

# LA CUMBRE AVÍCOLA LATINOAMERICANA



## ¿Qué pasa con el maíz y sus ingredientes relacionados?

Ana María Ballesteros

Directora de Marketing para América Latina  
Consejo de Granos de los Estados Unidos - U.S. Grains Council

En colaboración con:



## El maíz en la producción avícola

- Impacto económico
  - Oferta
  - Demanda
- Impacto nutricional
  - Calidad

10 reporte de la calidad de la  
cosecha de maíz – ciclo 2020/2021



**FAMSUN** Integrated Solution Provider

# US animal feed costs expected to rise 12% in 2021



By Ann Reus | December 11, 2020



Specialty ingredients for young animal nutrition.

Improves *health and performance*

READ MORE

### Latest Articles

**BASF, Adifo to roll out feed sustainability software**

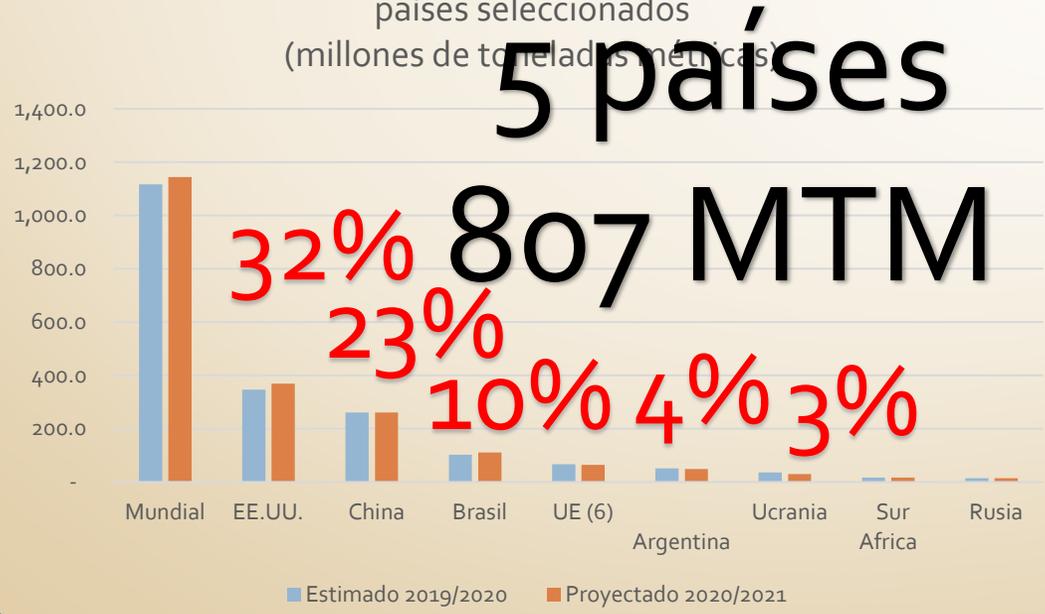
By Emma Penrod | December 22, 2020

**COVID relief bill includes US\$13 billion for ag aid**

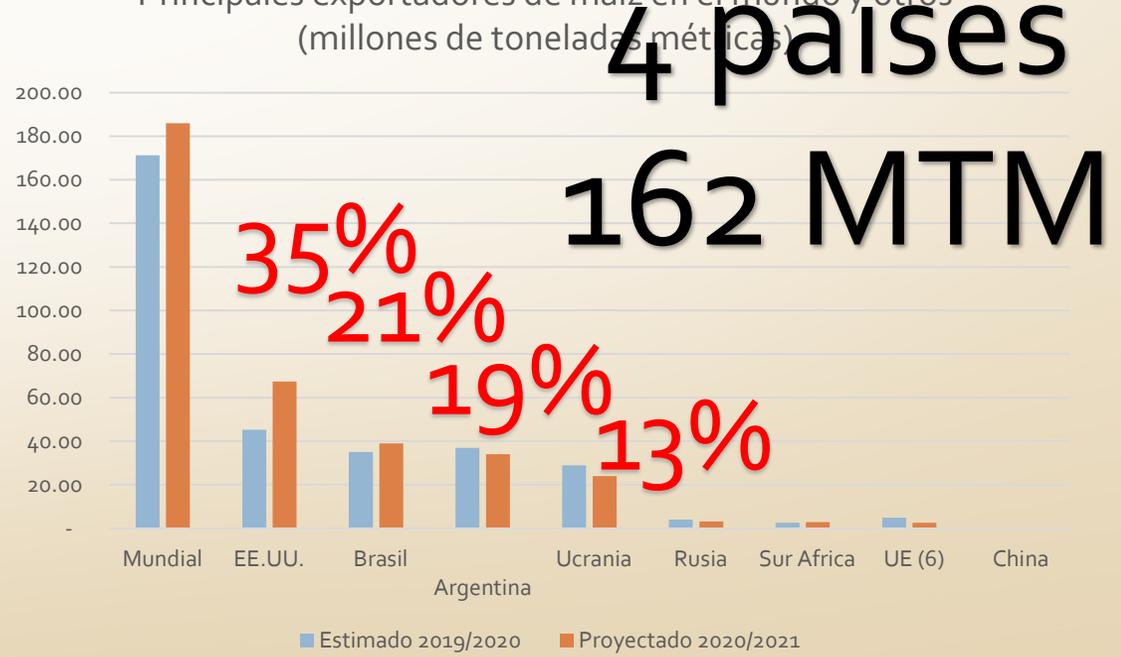
By Ann Reus | December 22, 2020

# Oferta Mundial

Principales productores de maíz en el mundo y otros países seleccionados (millones de toneladas métricas)



Principales exportadores de maíz en el mundo y otros países seleccionados (millones de toneladas métricas)



# Estados Unidos

Hoja de Balance EE.UU.	2018/2019	2019/2020 estimado	2020/2021 proy. Dic	2020/2021 proy. Ene	cambio
	<i>Millones de hectáreas</i>				
Área plantada	36.0	36.3	36.8	36.8	
Área cosechada	32.8	32.9	33.4	33.4	
	<i>toneladas por hectárea</i>				
Rendimiento por ha	11.06	10.50	11.02	10.78	-0.24
	<i>Millones de toneladas métricas</i>				
Inventarios iniciales	54.36	56.41	50.67	48.74	-1.93
Producción	364.24	345.95	368.48	360.22	-8.26
Importaciones	0.71	1.07	0.64	0.64	
<b>Oferta total</b>	<b>419.30</b>	<b>403.43</b>	<b>419.79</b>	<b>409.60</b>	
Alimentación animal y residual	137.90	148.01	144.78	143.51	
Alimento, semilla e industrial	172.54	159.56	164.47	161.93	
Etanol y co-productos	136.60	123.24	128.27	125.73	-2.54
Exportaciones	52.48	45.16	67.31	64.77	-2.54
<b>Uso total</b>	<b>362.92</b>	<b>352.73</b>	<b>376.56</b>	<b>370.21</b>	
Inventarios finales	56.16	50.67	43.23	39.42	-3.81
<b>Razon inventarios a uso</b>	<b>15.5%</b>	<b>14.4%</b>	<b>11.5%</b>	<b>10.6%</b>	

Elaboración propia. Fuente: Reporte WASDE Enero 2020 - USDA

<https://www.usda.gov/oce/commodity/wasde>

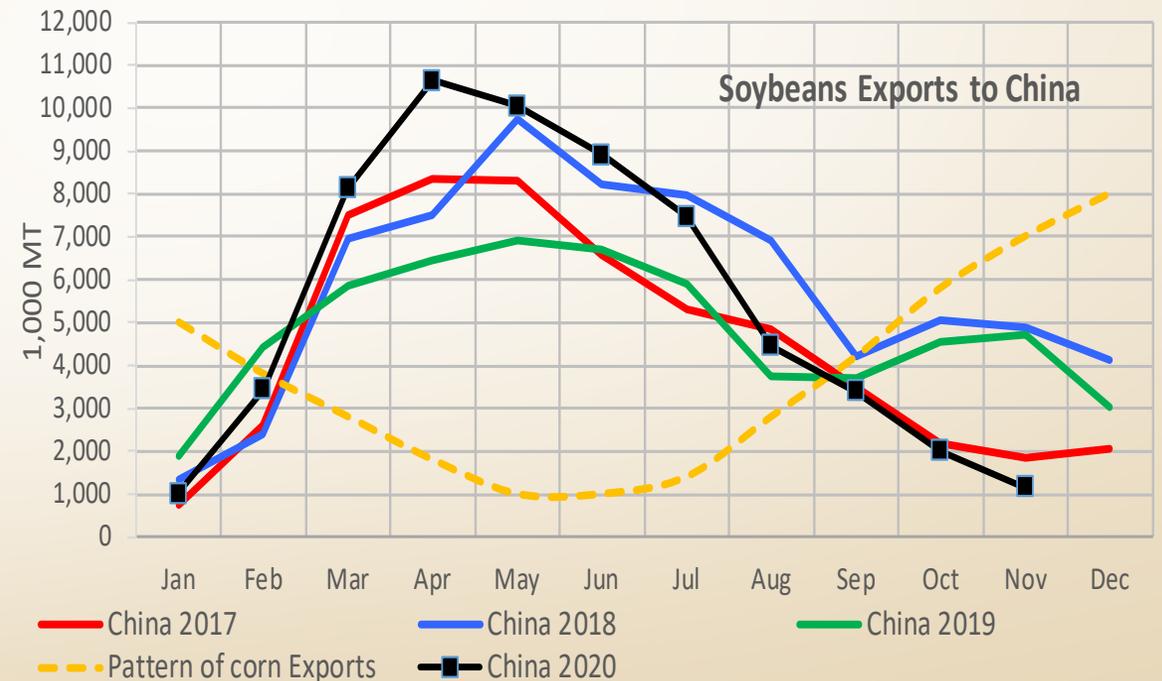
- Producción alta, pero bajó 8 MTM
- Igual las exportaciones
- Etanol: 35% de la producción
- Reducción en el uso para alimentación animal?
- Inventarios finales (abajo 4 MTM) y la razón inventarios finales a uso: demasiado bajos!

# Brasil

## Siembra en proceso: lluvias

- Exportaciones de soya impactan las exportaciones de maíz:
  - Ene-Nov 2020 - Récord histórico: 82.9 MTM (17% más que en 2019) – **60.7 MTM a China**
- 3 cosechas de maíz:
  - Verano: 23.4% - 24.2 MTM (25.27 en 2020)
  - Invierno (zafrihna): 74% - 76.8 MTM (2.3% + que en 2020)
  - Tercera: 2.6% - 1.6 MTM

Por ahora sólo estimados



Elaboración USGC Brasil

# Brasil

Corn commentary: Futures continue to rise following production cuts

## Brazil suspends corn, soybean import tax as prices rise

7 hours ago | [Andy Allan](#)

Brazil is set to remove tariffs on corn and soybean for at least three months, the country's Foreign Trade Chamber has announced, amid rising inflation for both commodities.

Following rumours last week that the government would remove the 8% import tax for corn and beans coming from countries outside of the Mercosul trade bloc, the government confirmed in a statement on Saturday that the tax will be suspended for soybeans until January 15, 2021 and for corn until March 31.

Brazil's agricultural statistics agency

at \$5.29/bu, up \$0.1/bu.

## The month of 2021. **Brazil's corn ethanol production to rise 64% in 2020/21: UNEM**

"The month of 2 hours ago | [Thomas Hughes](#)

High priority Realist Corn-based ethanol production in Brazil is expected to reach 2.75 billion litres in the 2020/21 marketing year as capacity in core corn-growing states has grown, the country's National Corn Ethanol Union (UNEM) said late Tuesday.

Production from January to October alone has now reached 2.1 billion litres owing to the entry into the market of two new plants – one operated by FS Bioenergia and the other by Inpassa – in the state of Mato Grosso.

Over the past three years the growth of the sector, while still small in relation to sugar, has been rapid despite escalating corn prices and the impact of the Covid-19 pandemic this year.

Total output is still markedly smaller than that from sugar overall, which hit 28.3 billion litres at plants in the centre and south of the country in April to October alone.

It will, however, be higher than sugar-based plants in the north of the country where production is likely to be no more than 1.9 billion litres during the April-March marketing year.

In terms of the effects of the pandemic, of the four corn-based ethanol plants that were set to be launched this year, only one plant – Etamil in Mato Grosso – was delayed and production is now slated to commence at the beginning of next year.

Additionally, DDGS production is set to increase as a result of greater ethanol production with volumes set to hit 2 million mt in the same period.

# Argentina

- Siembra de maíz al 10 de enero **85.3%**
- Algo de retraso vs año anterior
  - Lluvias
  - Condiciones irregulares
  - Falta de humedad en las regions de cosecha temprana
- Estimaciones preliminares de 47 MTM vs 51.5 MTM año pasado

<b>CORN</b>		<b>2019-20</b>	<b>2020-21*</b>
Production	000 Tons	58.400	53.000
Initial Stock	000 Tons	1.700	3.680
<b>TOTAL SUPPLY</b>	<b>000 Tons</b>	<b>60.100</b>	<b>56.680</b>
Domestic Consumption	000 Tons	20.420	21.620
<i>Milling</i>	<i>000 Tons</i>	6.420	6.620
<i>Feed+Others</i>	<i>000 Tons</i>	14.000	15.000
Exports	000 Tons	36.000	32.000
<b>TOTAL DEMAND</b>	<b>000 Tons</b>	<b>56.420</b>	<b>53.620</b>
Ending Stocks	000 Tons	3.680	3.059
<b>DEMAND - Dic 30th</b>	<b>000 Tons</b>	<b>55.904</b>	<b>12.839</b>
		93%	23%
<i>Exporters</i>	<i>000 Tons</i>	37.697	11.174
<i>Industry</i>	<i>000 Tons</i>	4.705	128
<i>Feed &amp; Others</i>	<i>000 Tons</i>	13.500	
<i>MAT</i>	<i>000 Tons</i>	2	1.538
<b>UNSOLD STOCKS</b>	<b>000 Tons</b>	<b>4.196</b>	<b>43.841</b>
		7%	77%
Shipments Nov 30th	000 Tons	-35.673	
Industrial Usage	000 Tons	-5.394	
Export Sales	000 Tons	33.753	8.961
Exporters Position	000 Tons	3.944	20.135

Source: Based on MAGyP, Bolsa de Cereales and privates information

16 (14) V

**Argentina closes 19/20 corn export regs. to safeguard internal supply**

← →

50 minutes ago | [Juan Pedro Tomas](#), [Tim Worledge](#)

Argentina's Agriculture Ministry has temporarily suspended the registration of foreign export sales for corn with a shipment start date prior to March 1, 2021, the start of the

**Argentine government drops corn export ban, strike action ends**

“This  
of a  
The  
The  
ens

10 minutes ago | [Juan Pedro Tomas](#)

The  
The  
ens

Argentina's agriculture ministry has lifted all restrictions on old crop corn exports after holding a further meeting with the farming sector, the ministry has said in a statement.

“Even  
regi

In the statement, the ministry claimed the meetings had provided further reassurance as the government seeks to balance the interests of private companies with the need to guarantee domestic supply.

Acc  
prev

The authorities committed to lift the export limit, which was set at 30,000 mt per day at the start of the week, but confirmed that they will continuously monitor the exportable balance to guarantee internal supply until the beginning of the new corn campaign in March.

For  
Min  
rice

The 30,000 mt limit was itself a replacement for a complete suspension on all old crop corn exports during January and February, which was introduced at the end of December amid surging international corn, wheat and soybean prices.

Dat

However, according to private estimates, there is a stock of more than 8 million mt of corn in the domestic market, a volume more than enough to supply the 3.46 million mt required by the domestic market during January and February.

Can

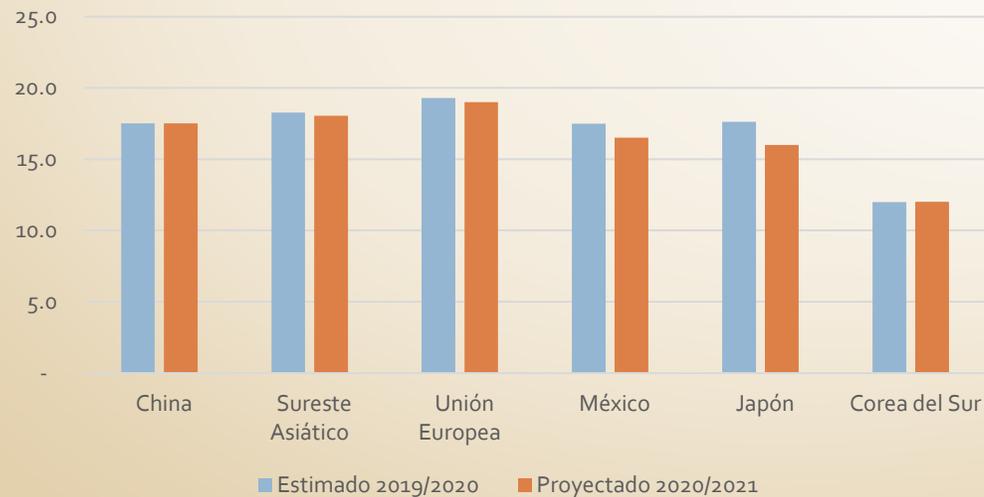
“For the national government, it is a priority to decouple domestic prices from the dynamics of international prices, while we can continue to strengthen the development of the sector and exports. From the Ministry we work to find the best tools that allow us to grow with this dual objective,” agriculture minister Luis Basterra said.

The sector has set up a roundtable representing more than 32 companies from across the agriculture industry in a bid to find a solution that allows the sector to benefit from high international prices, and the opportunity that brings to generate foreign currency, while also protecting the domestic market from the price rises.

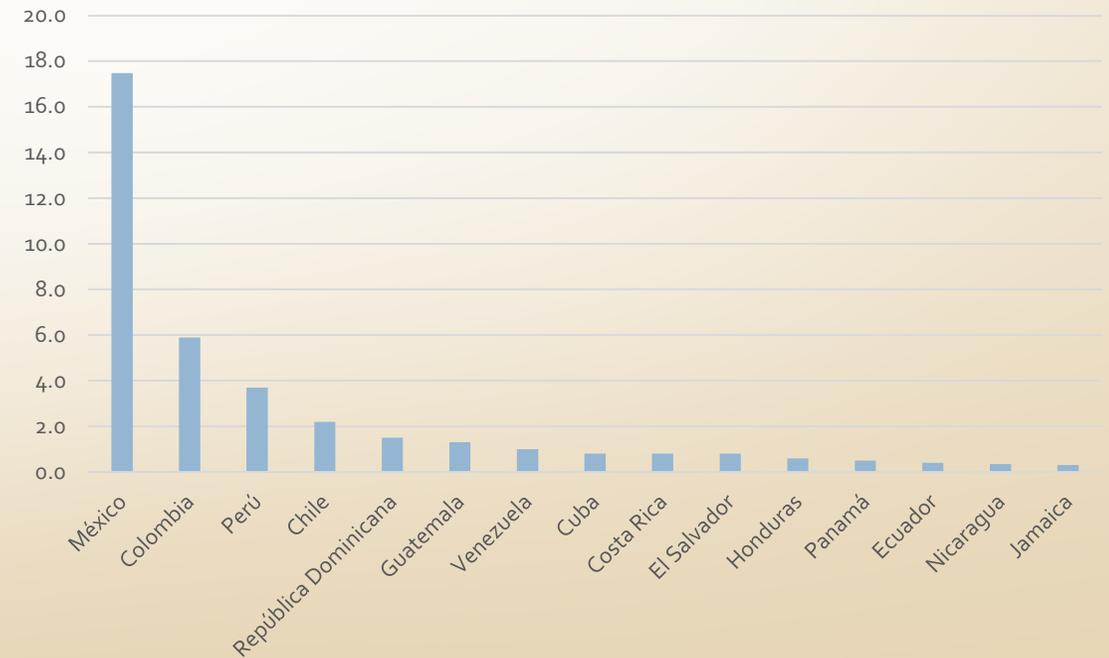
The suspension of the export license register for old crop corn sparked a furious response from farmer lobby groups, who mounted industrial action on Monday to protest at the decision, with three of the country's main rural entities launching a 72-hour strike.

# Demanda mundial y de América Latina

Principales importadores de maíz del mundo  
(millones de toneladas métricas)

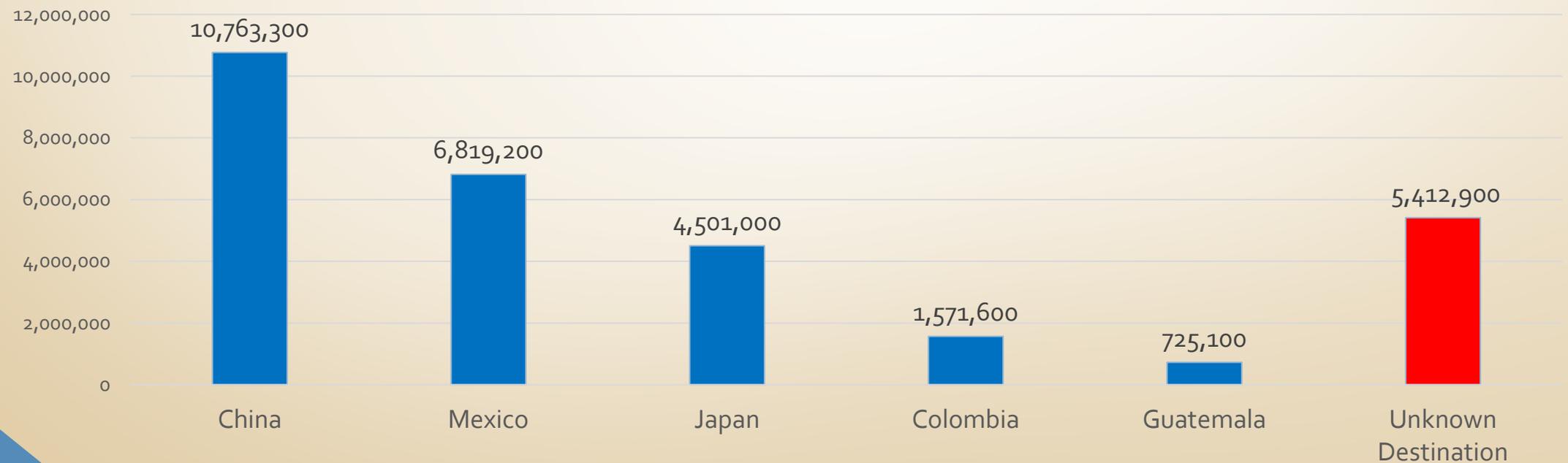


Importaciones de América Latina y el Caribe (2019/2020)  
(MTM)



# China dominando la demanda mundial y específicamente de los Estados Unidos

Top 6 Mercados de maíz USA 2020/21 (TM)



## China's Sinograin investigates corn quality in northeast warehouse

China bans feeding of food waste to hogs in provinces with African swine fever



China's state grain stockpiler Sinograin is investigating the quality of its warehouses in northeastern China, it said in a report after a video shared on social media alleged that the site was

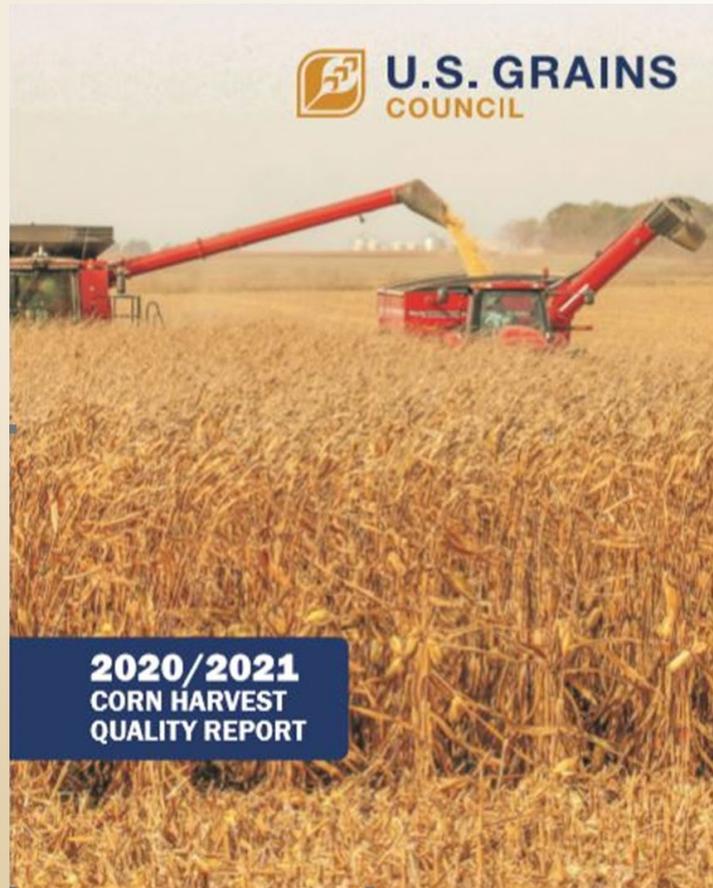
## *Xi Declares War on Food Waste, and China Races to Tighten Its Belt*

found corn inside a warehouse managed by a Sinograin subsidiary in Zhaodong in Heilongjiang province.

# Qué debemos monitorear

- Reporte de estimados de oferta y demanda mundial agrícola del USDA (WASDE)
- Exportaciones y demanda de China
- Clima en países productores: siembra - cosecha – transporte
- Otros factores que puedan afectar la oferta y la demanda (huelgas, restricciones al comercio, COVID19, otros)
- Políticas de la nueva administración en EE.UU. en relación a la producción de etanol
  - Impacto directo en maíz y co-productos como los DDGS pero sin impacto en otros como el gluten de maíz.
- Factores técnicos y posiciones de los fondos de inversión

# Calidad del maíz de los Estados Unidos ciclo 2020/2021



- 10A edición
- 2 partes del reporte anual: cosecha y punto de exportación
- Reporte de la cosecha disponible en:  
<https://grains.org/ita/resources-page/reports/reportes-de-calidad-de-maiz/>
- Video resumen, [aquí](#).
- Segunda parte del reporte disponible en Abril – Mayo.



# U.S. GRAINS COUNCIL

**Gracias!**

Ana María Ballesteros  
Directora de Marketing para América Latina  
U.S. Grains Council

[aballesteros@grains.org](mailto:aballesteros@grains.org)