



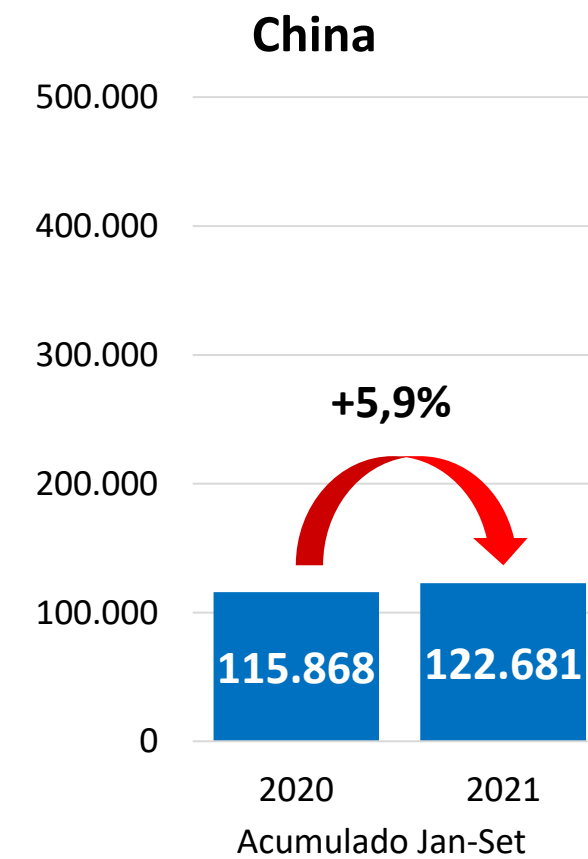
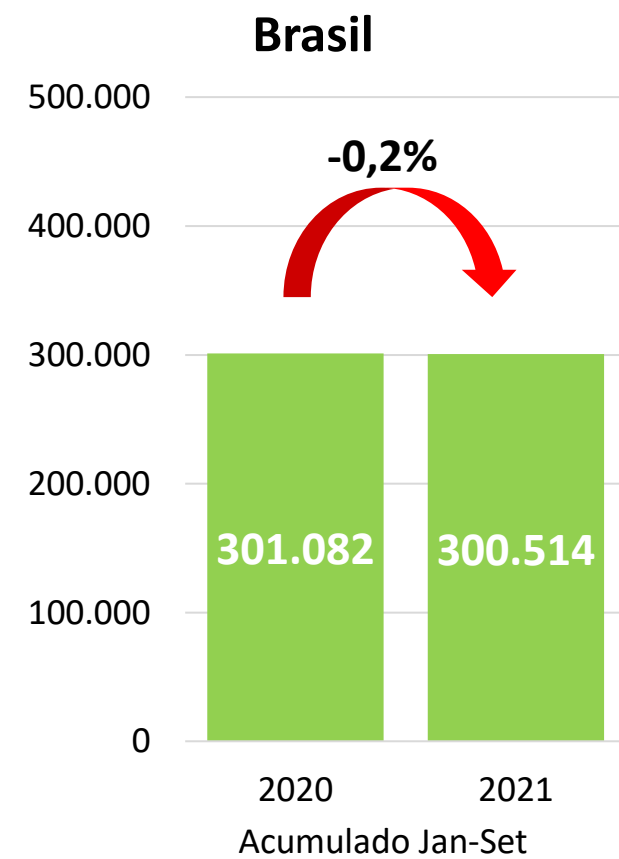
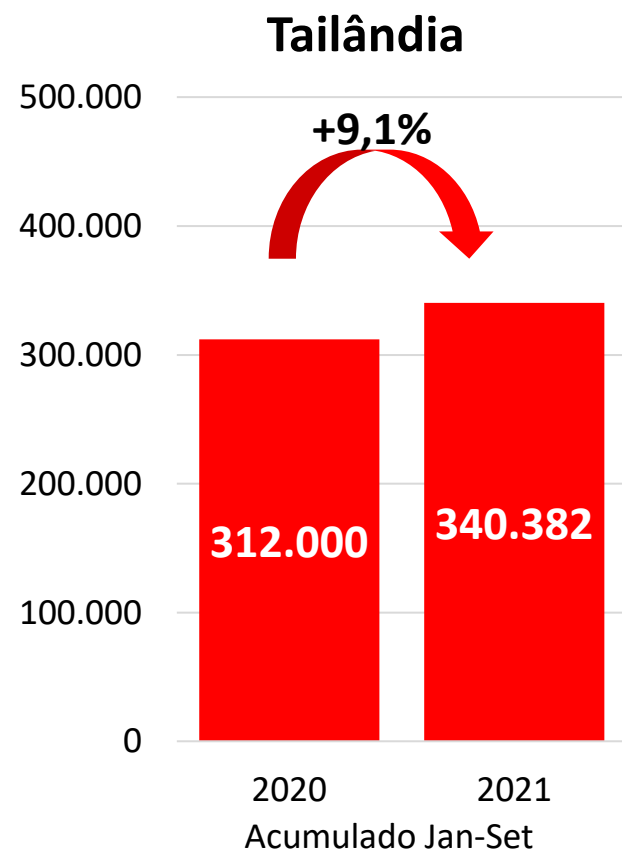
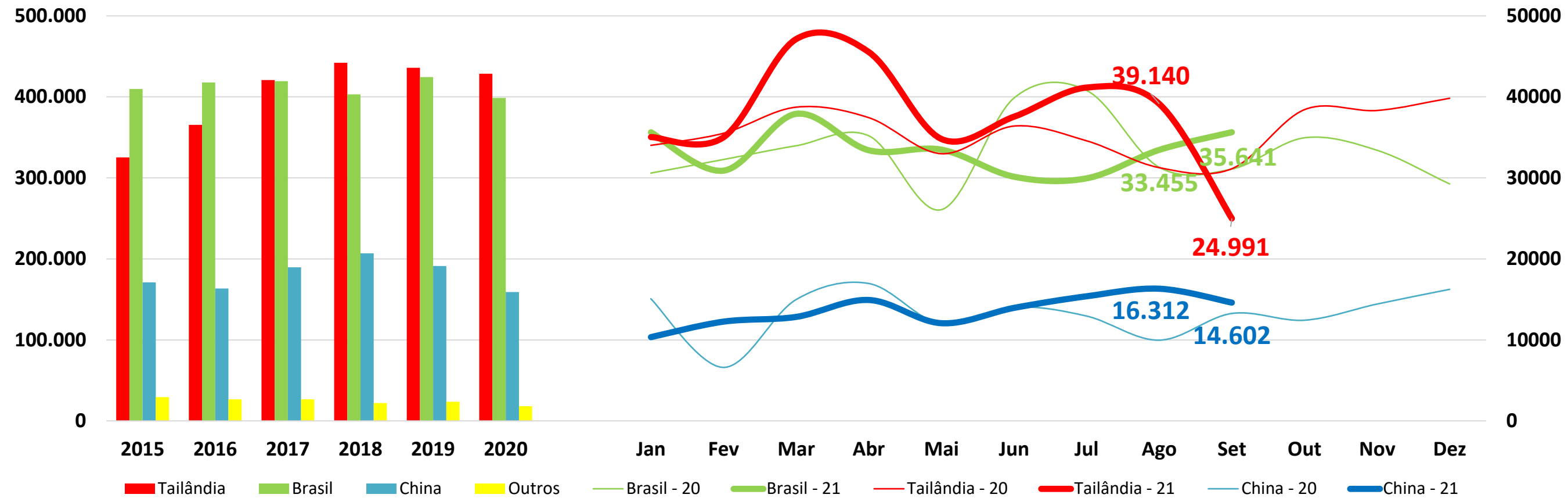
Núcleo de Inteligência Competitiva

Análise da Perna Japão

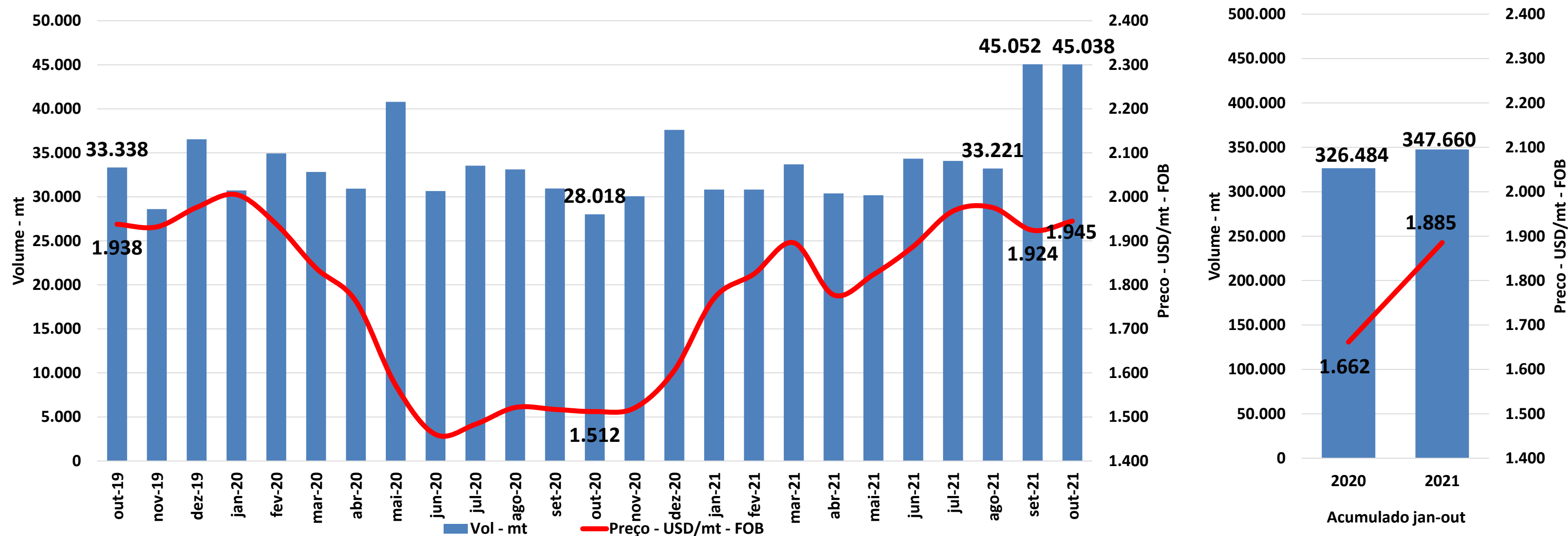
Novembro
2021

JAPÃO - IMPORTAÇÕES DE CARNE DE FRANGO - POR ORIGEM

Japão - Importação de Carne de Frango - Total - mt

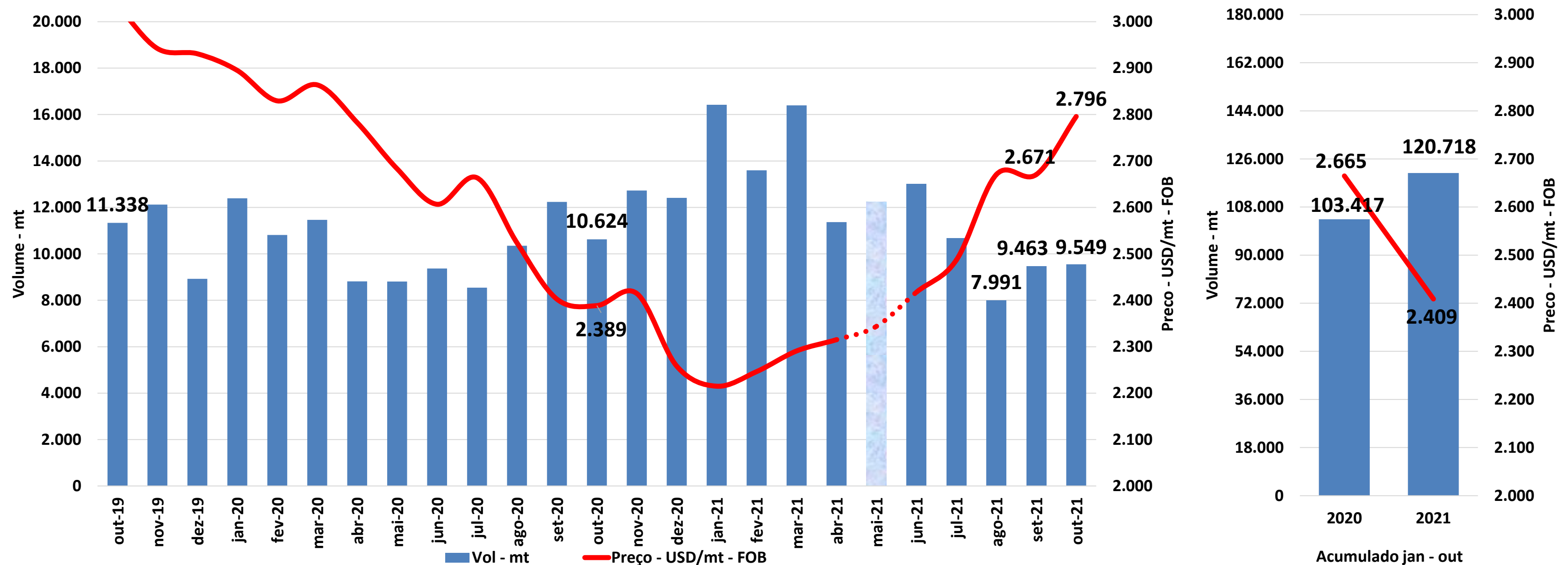


Exportações do Brasil - Cortes In Natura



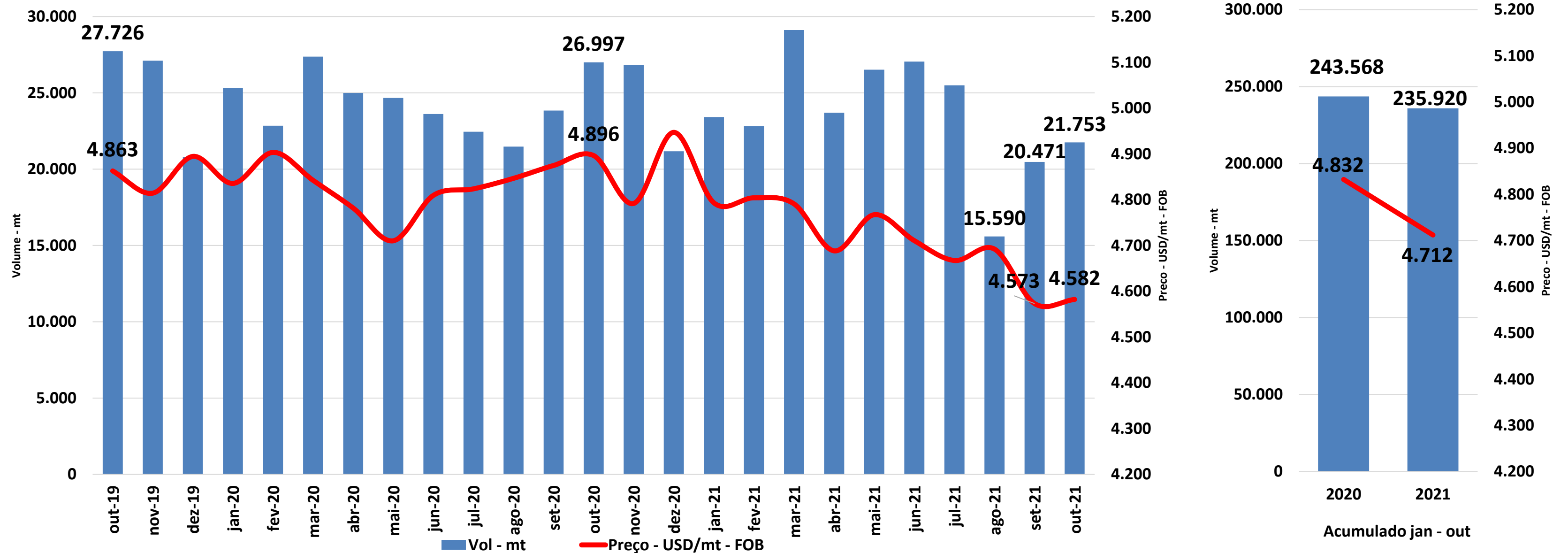
Quadro Comparativo	Volume		Preço		Receita	
	ton	%	USD/ton	%	USD	%
out-21 x set-21	↓ -13	0,0%	↑ 21	1,1%	↑ 911	1,1%
out-21 x out-20	↑ 17.021	60,7%	↑ 433	28,6%	↑ 45.231	106,8%
jan-out/21 x jan-out/20	↑ 21.176	6,5%	↑ 224	13,5%	↑ 113.018	20,8%

Exportações da Tailândia - Cortes In Natura



Quadro Comparativo	Volume		Preço		Receita	
	ton	%	USD/ton	%	USD	%
out-21 x set-21	↑ 86	0,9%	↑ 125	4,7%	↑ 1.424	5,6%
out-21 x out-20	↓ -1.075	-10,1%	↑ 407	17,1%	↑ 1.320	5,2%
jan-out/21 x jan-out/20	↑ 17.301	16,7%	↓ -256	-9,6%	↑ 15.256	5,5%

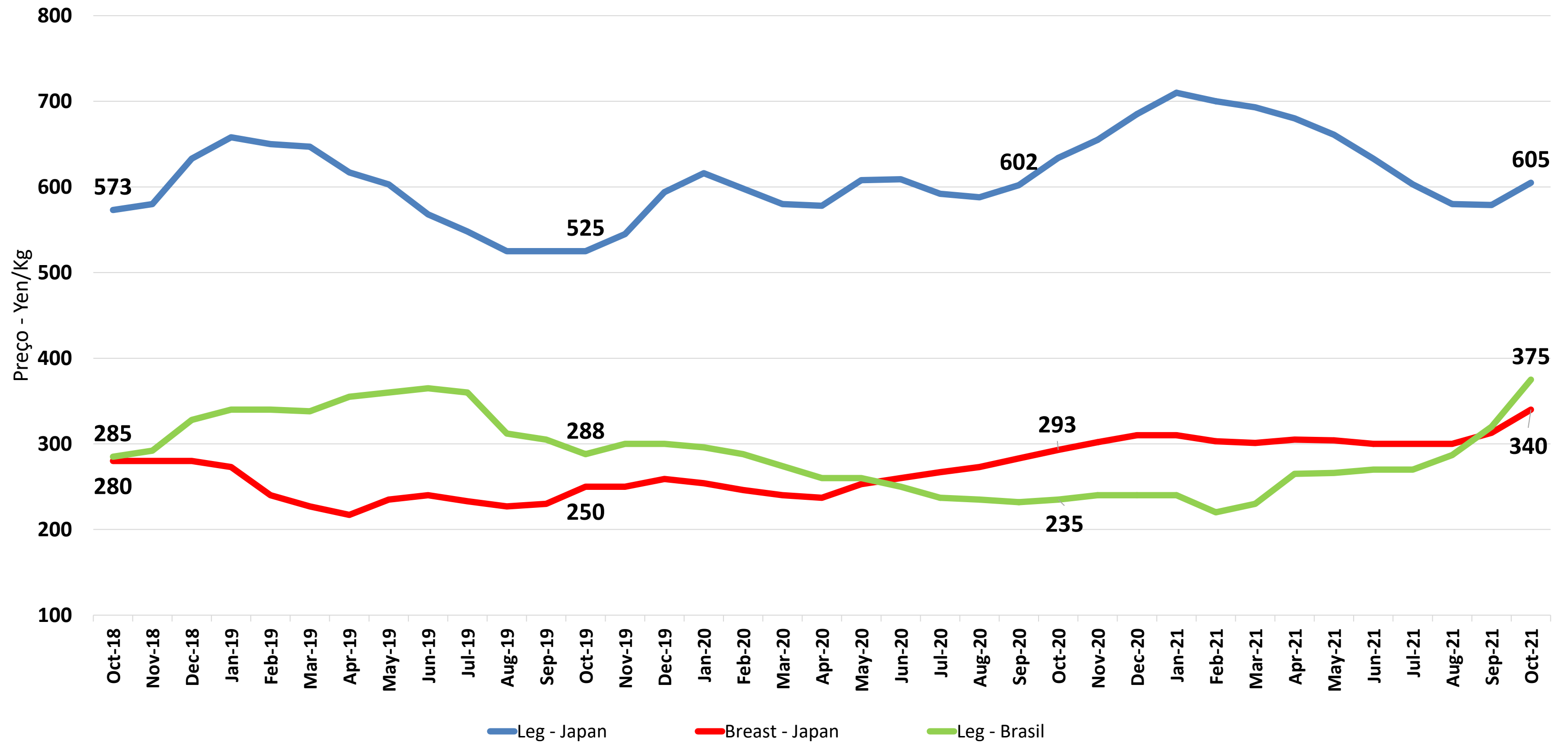
Exportações da Tailândia - Processados



Quadro Comparativo	Volume		Preço		Receita	
	ton	%	USD/ton	%	USD	%
out-21 x set-21	↑ 1.282	6,3%	↑ 9	0,2%	↑ 6.057	6,5%
out-21 x out-20	↓ -5.245	-19,4%	↓ -314	-6,4%	↓ -32.517	-24,6%
jan-out/21 x jan-out/20	↓ -7.648	-3,1%	↓ -120	-2,5%	↓ -65.312	-5,5%

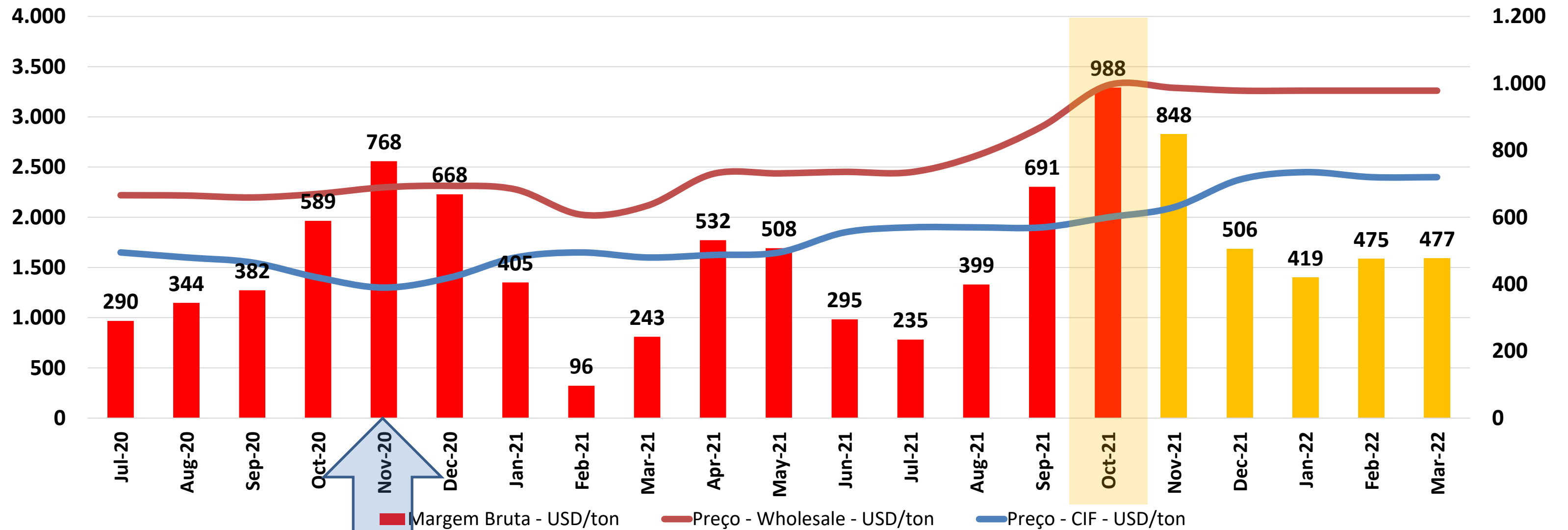
Evolução de Preços no Atacado Japonês

Evolução de Preços - Local Market - Yen/Kg



JAPÃO - Estimativa da Evolução das Margens do Importador

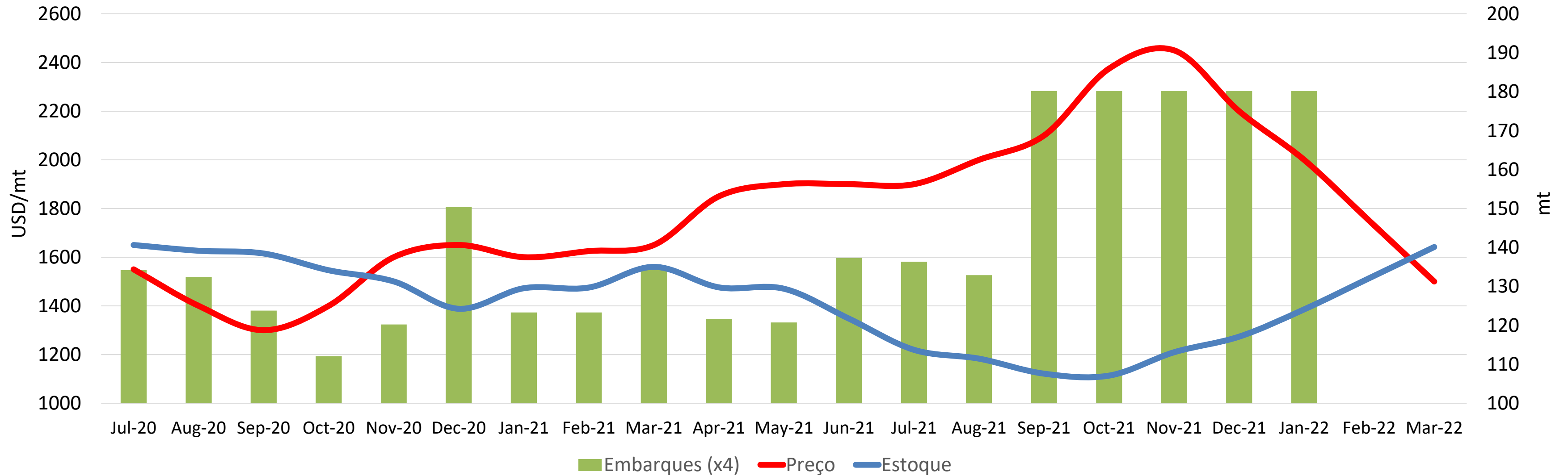
Evolução da Margem Bruta do Importador



Perna Japão - Cortes	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22
@ rate	106,8	106,0	105,6	105,2	104,4	103,8	105,4	108,6	108,7	108,9	109,2	110,1	110,3	109,8	110,2	113,1	114,0	115,0	115,0	115,0	115,0
Preço - Wholesale Local - Yen/Kg	237	235	232	235	240	240	240	220	230	265	266	270	270	287	320	375	375	375	375	375	375
Preço - Wholesale - USD/ton	2.220	2.217	2.197	2.234	2.298	2.313	2.277	2.026	2.115	2.433	2.437	2.452	2.449	2.613	2.905	3.316	3.289	3.261	3.261	3.261	3.261
Preço - CIF - USD/ton	1.650	1.600	1.550	1.400	1.300	1.400	1.600	1.650	1.600	1.625	1.650	1.850	1.900	1.900	1.900	2.000	2.100	2.375	2.450	2.400	2.400
Preço - CIF - Yen/Kg	176	170	164	147	136	145	169	179	174	177	180	204	209	209	209	226	239	273	282	276	276
Margem Bruta - USD/ton	290	344	382	589	768	668	405	96	243	532	508	295	235	399	691	988	848	506	419	475	477
Margem Bruta - %	13%	16%	17%	26%	33%	29%	18%	5%	11%	22%	21%	12%	10%	15%	24%	30%	26%	16%	13%	15%	15%

JAPÃO - Cenário da Evolução de Estoques X Preço

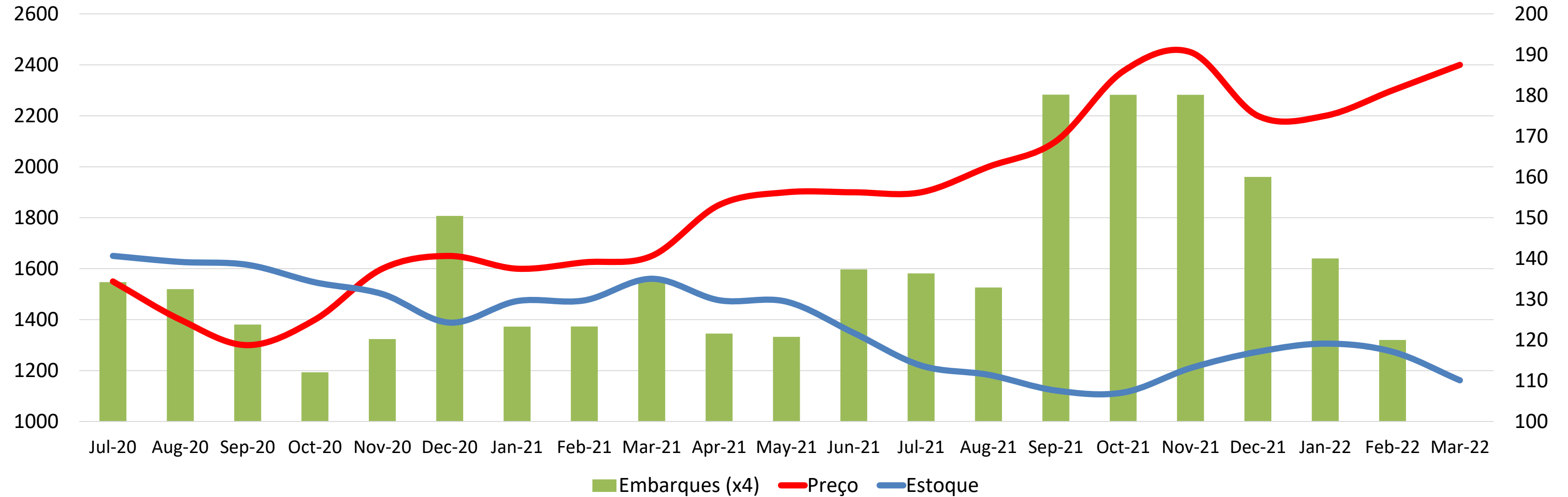
Cenário 1



Cenário 1	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22
Preço - USD/mt CFR	1.550	1.400	1.300	1.400	1.600	1.650	1.600	1.625	1.650	1.850	1.900	1.900	1.900	2.000	2.100	2.375	2.450	2.200	2.000	1.750	1.500
Estoque - mt	140.623	139.150	138.439	134.145	131.279	124.260	129.534	129.711	135.017	129.751	129.405	121.726	113.728	111.459	107.605	107.105	113.105	117.105	124.105	132.105	140.105
Embarques - mt	33.548	33.118	30.950	28.018	30.060	37.613	30.826	30.829	33.690	30.395	30.191	34.333	34.084	33.221	45.052	45.038	45.000	45.000	45.000		

JAPÃO - Cenário da Evolução de Estoques X Preço

Cenário 2



Cenário 2	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22
Preço - USD/mt C	1.550	1.400	1.300	1.400	1.600	1.650	1.600	1.625	1.650	1.850	1.900	1.900	1.900	2.000	2.100	2.375	2.450	2.200	2.200	2.300	2.400
Estoque - mt	140.623	139.150	138.439	134.145	131.279	124.260	129.534	129.711	135.017	129.751	129.405	121.726	113.728	111.459	107.605	107.105	113.105	117.105	119.105	117.105	110.105
Embarques - mt	33.548	33.118	30.950	28.018	30.060	37.613	30.826	30.829	33.690	30.395	30.191	34.333	34.084	33.221	45.052	45.038	45.038	40.000	35.000	30.000	0

Equivalência entre produtos - BL vs. WL e Leg Quarter

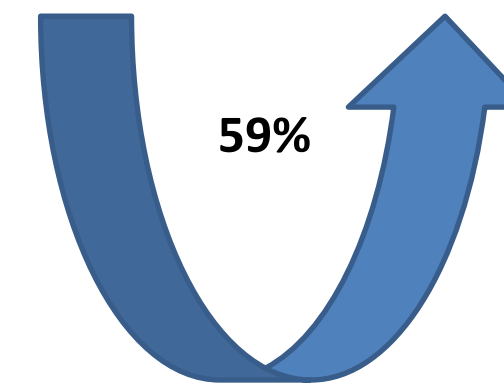
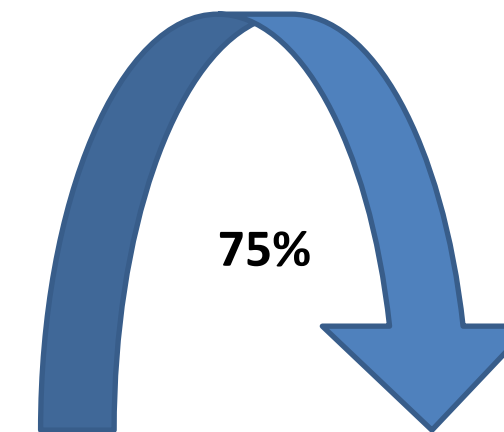
Taxa de cambio

5.5

BIL Local market => BL Jpn		R\$/Kg	USD/Kg
Price in R\$/KG -Gross		8.25	
Inland Freight +comm. + Storage R\$/Kg		0.70	
Local Duty 0%	0%	0	
Price Ex factory R\$/Kg		7.55	
Additional Cost of debonning and calibrating the BIL		1.38	0.250
Cost of rounding weight due nr. Pieces per polybag (3%)	3%	0.23	
Cost of meat after debonning and calibrating	75%	11.67	
Cost difference in packing material		0.13	
Inland Freight R\$/Kg		0.01	
Sea Freight + Port Expenses (USD/Kg)		1.2925	0.235
Price CFR per mt USD		13.10	2.382

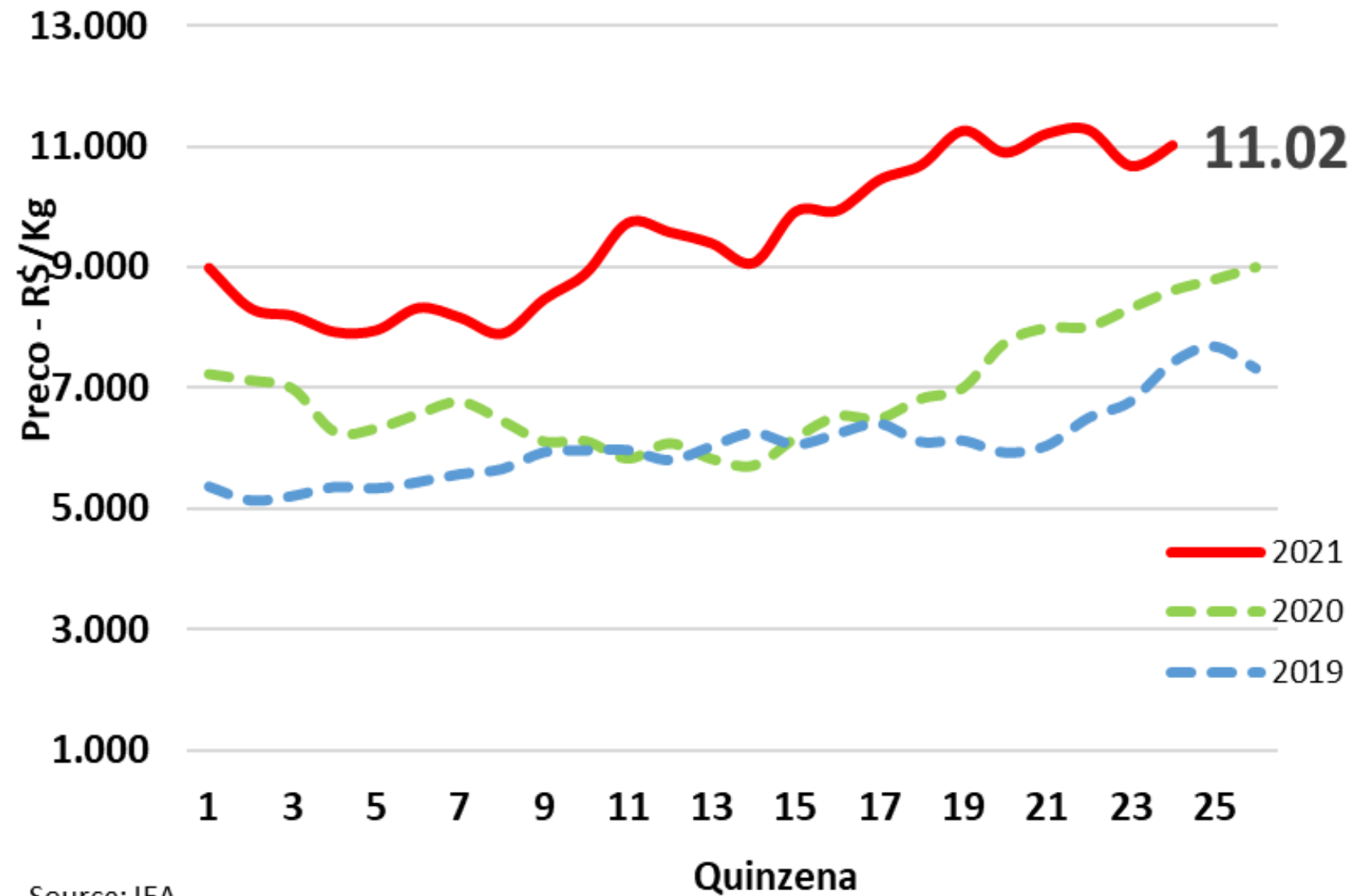
Equivalencia		Price		BL Jpn
MI - BIL	R\$/Kg CFR	8.25	USD/mt CFR	2.382
ME - CLQ	USD/mt FOB	1.10	USD/mt CFR	2.389

CLQ FOB => BL Jpn		R\$/Kg	USD/Kg
Price in R\$/KG -Gross		6.05	1.100
Inland Freight R\$/Kg		0.10	
Local Duty 0%	0%	0	
Price Ex factory R\$/Kg		5.95	
Additional Cost of debonning and calibrating the BIL		1.375	0.250
Cost of rounding weight due nr. Pieces per polybag (3%)	3%	0.18	
Cost of meat after debonning and calibrating	59%	11.64	
Cost difference in packing material		0.20	
Inland Freight R\$/Kg		0.01	
Sea Freight + Port Expenses (USD/Kg)		1.2925	0.235
Price CFR per mt USD		13.14	2.389

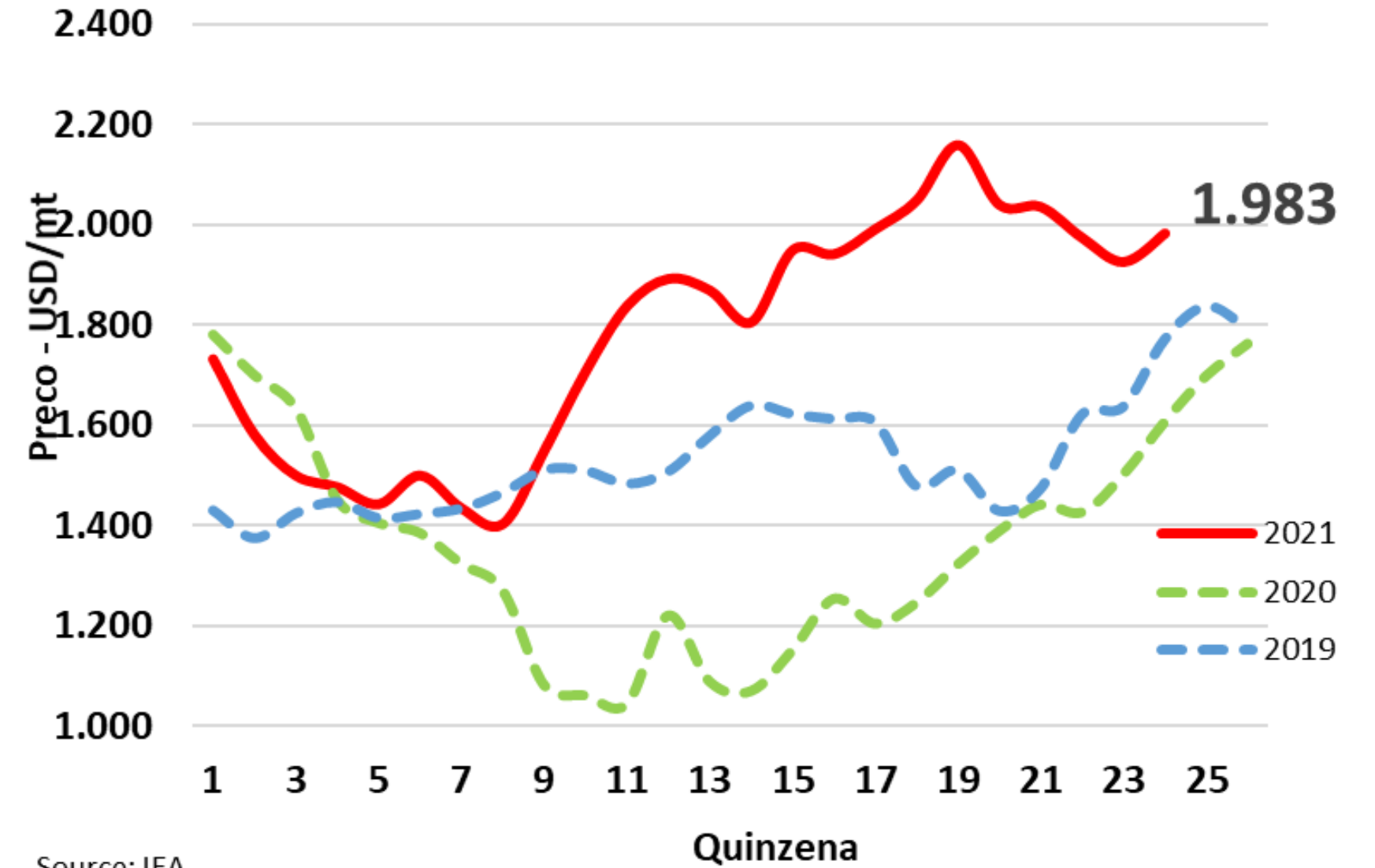


Mercado Atacadista de São Paulo

Preço Mais Comum no Mercado Atacadista de São Paulo - Coxa - R\$/Kg

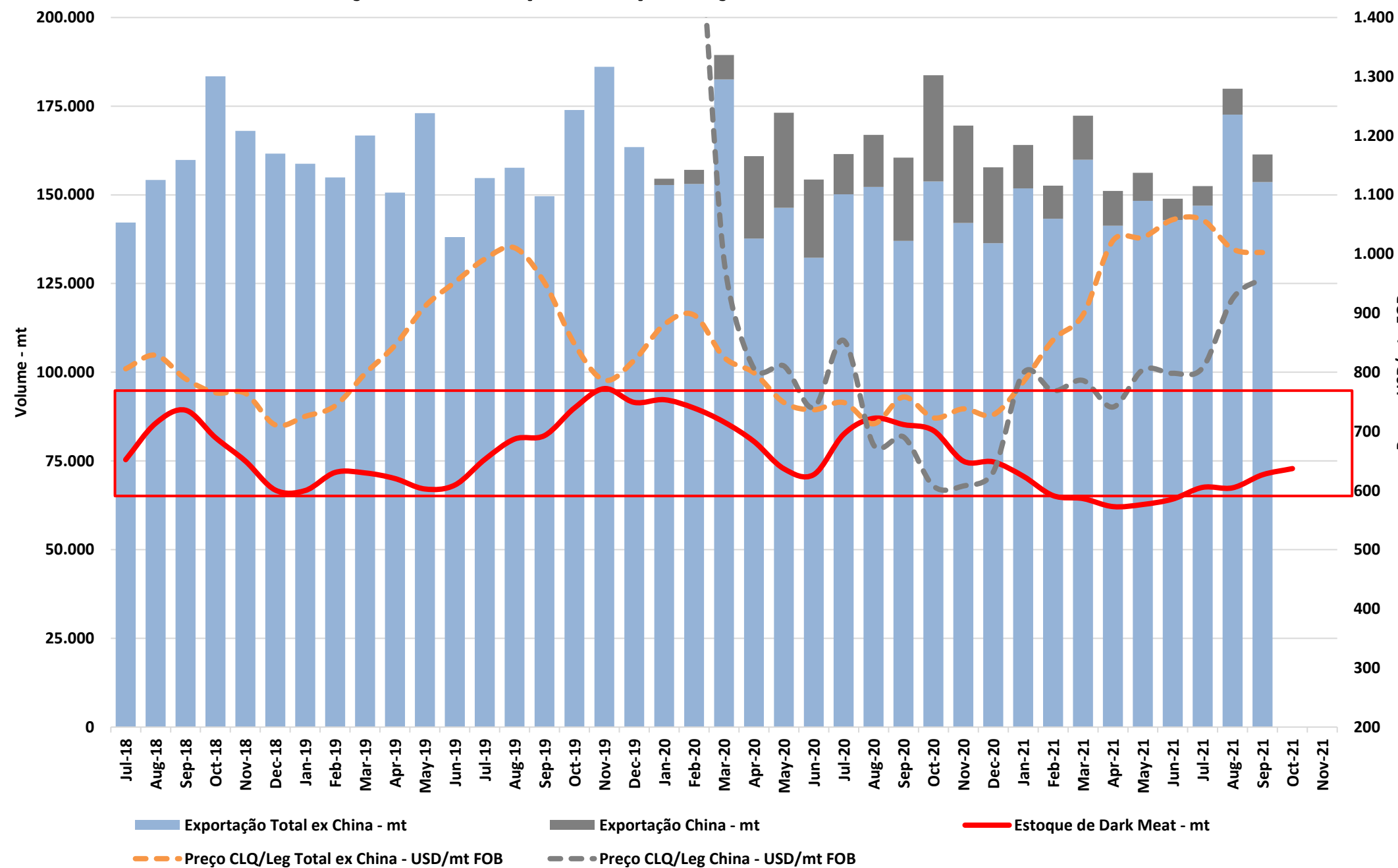


Preço Mais Comum no Mercado Atacadista de São Paulo - Coxa - USD/mt

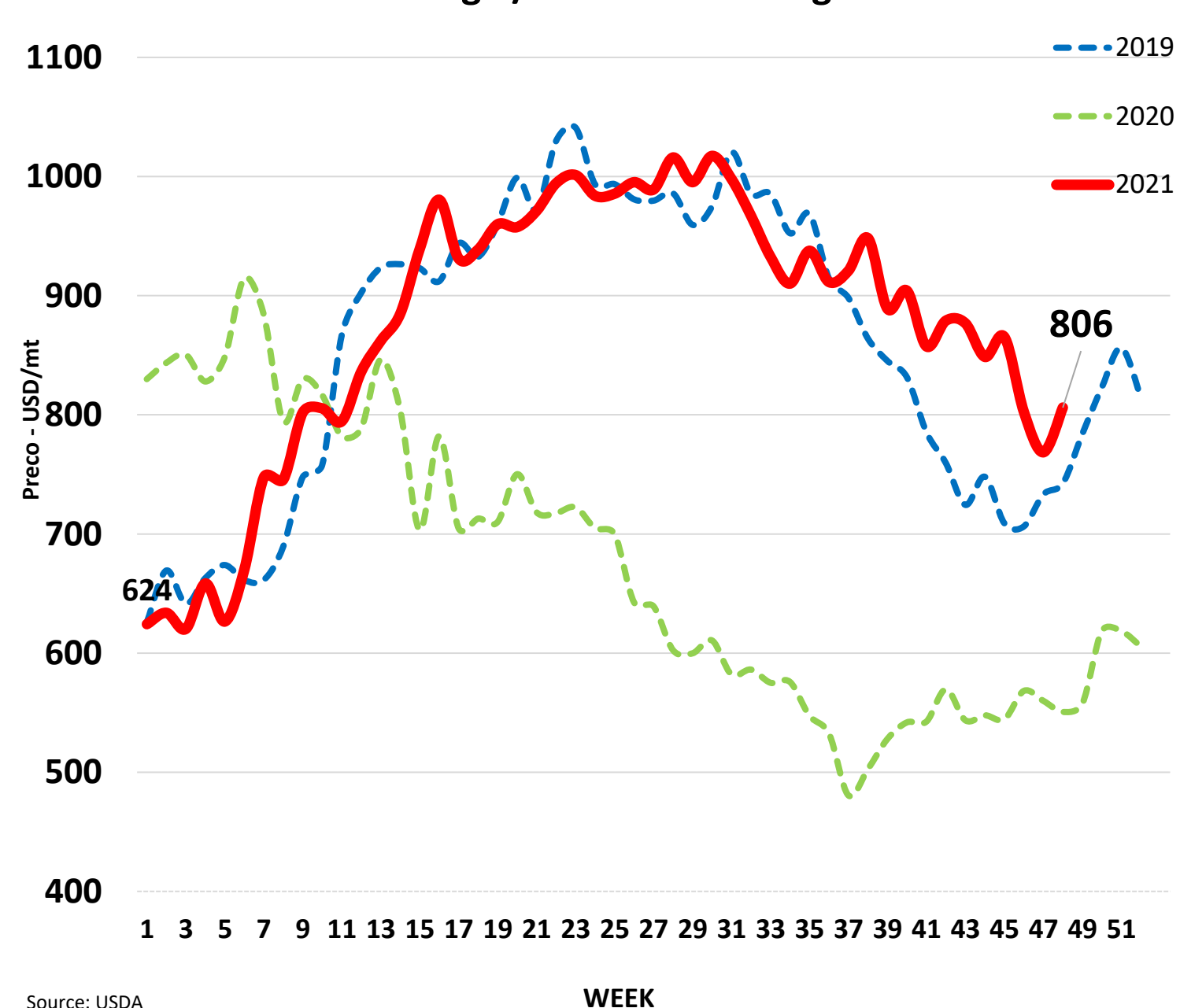


USA - Cenário da Evolução de Estoques X Preço do Leg Quarter

Evolução do Estoque x Exportações de Perna - Volume - mt



US - Leg 1/4 - Northeast Region





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