

**USDA FOODS**



HEALTHY CHOICES  
AMERICAN GROWN

# Welcome

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**Angie Snyder**

*Office of the Deputy Administrator, LPS Program*



# **Livestock and Poultry Economic Outlook**

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U.S. Department of Agriculture

**AMS Annual Industry Conference**

Egg, Fish, Poultry, and Red Meat Breakout Sessions

Doubletree Hotel by Hilton – Crystal City

Arlington, Virginia

October 26, 2016

# Broiler Industry

- Supply
  - Production increasing in 2017 – up 2%
  - Live weights appear to have plateaued
- Demand
  - 2016 per capita disappearance 90.3 lbs, up 2%
  - 2017 per capita disappearance 91.8 lbs, up 2%
  - Exports up in 2017 by 5%
- Price Trends
  - 2017 wholesale whole bird—\$0.84/lb, down 1%
  - Retail composite—\$1.95/lb, up 3%

# Turkey Industry

- Supply
  - Industry has recovered from HPAI
  - Production up in 2017 by 1.2%
  - Live weights continue to increase
- Demand
  - 2016 per capita disappearance 17.0 lbs, up 6%
  - 2017 per capita disappearance remains at 17.0 lbs
  - 2017 turkey exports up 12%
- Price Trends
  - 2017 wholesale whole hen \$1.16/lb, down 3%
  - Retail whole bird \$1.52/lb, up 1%

# Egg Industry

- Supply
  - Industry beginning to transition to cage-free
  - Table egg production up 2% in 2017
  - Eggs broken up 3% in 2016
- Demand
  - Per capita disappearance 266 eggs in 2016, up 5%
  - Per capita disappearance unchanged in 2017
  - Exports up 14% in 2017
- Price Trends
  - 2017 wholesale Grade A large \$0.99/doz, up 15%
  - Retail Grade A large \$1.78/doz, up <1%

# Cattle/Beef Industry

- Supply—Record high production
  - Production increase 5% in 2016 to 25 billion lbs.
  - Production increase 4% in 2017 to 26 billion lbs.
  - Imports down 9 and 11%
- Demand
  - Per capita disappearance 2016 55.4 lbs, up 3%
  - Per capita disappearance 2017 55.6 lbs, up slightly
  - Exports up 7 and 9%
- Price Trends
  - Current Retail Choice beef \$5.72/lb, Wholesale \$2.74/lb
  - Prices down 5% in 2016, up 2-3% in 2017

# Swine/Pork Industry

- Supply—Record High Production
  - Production increase 2% in 2016 to 25 billion lbs.
  - Production increase 4% in 2017 to 26 billion lbs.
  - Imports up 2%,
- Demand
  - Per capita disappearance 2016 49.9 lbs, up slightly
  - Per capita disappearance 2017 51.4 lbs, up 3%
  - Exports up 4%, both years
- Price Trends
  - Current Retail price \$3.79 per lb., wholesale price \$1.55 lb.
  - Down 2-4% in 2016, Up 0-1% in 2017



# Sheep/Lamb Industry

- Supply
  - Production increase 1% in 2016 to 152 million lbs.
  - Production flat in 2017
  - Imports up 2% in 2016, down 14% in 2017
- Demand
  - Per capita disappearance 2016 1.0 lbs.
  - Per capita disappearance 2017 0.9 lbs.
- Price Trends
  - Up 2-3% in both 2016 and 2017

# Fish

- Catfish (Top 3 states)
  - Surface acres down 4% in 2016 from prior year
  - Broodfish numbers down 3%, Foodsize fish down 13%, Stockers up 13%
- Salmon
  - Harvest data not yet available
  - Sockeye harvest up, pink very low

## **Fish, cont'd.**

- Pollock
  - BSAI Catch up 30,000 MT from 2015's 1,310,000 MT
  - GOA Catch ongoing but up
  
- Fish/seafood prices up slightly in 2016, 1-2% in 2017

# General Outlook

- Feed situation
  - Corn—Prices down 46 cents per bu. to \$3.09 per bu.
  - Soybean meal—Prices up \$8 per short ton to \$338
- Trade
  - Continued strength in U.S. dollar in 2017, but forecast for imports down, exports up

*Note: All forecasts assume no new HPAI outbreak*

# Questions?

**Don't forget to check out our monthly publication,  
"The Economic Landscape" available at**

**[www.ams.usda.gov/AMSV1.0/AMSAgriculturalAnalytics](http://www.ams.usda.gov/AMSV1.0/AMSAgriculturalAnalytics)**

# ***QUALITY ASSESSMENT DIVISION***



Annual Industry Meeting  
October 26, 2016

# Auditing & Processing Updates

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- ▶ **Oversights**
- ▶ **Grading**
- ▶ **Auditing**
- ▶ **Technical**



# Auditing & Processing Updates (cont'd)

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- Further Processing Certification Program
- Checkloading
- Freezing Time and Temperature Requirement



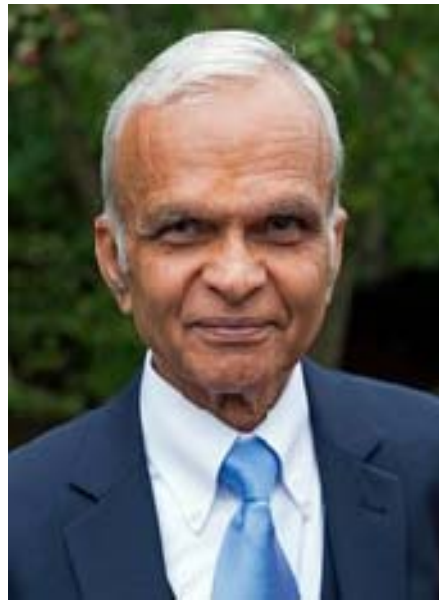
# ***FOOD SAFETY AND COMMODITY SPECIFICATIONS DIVISION***



Annual Industry Meeting  
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# Dr. Chandramohan Chawan

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1944 - 2016

# Food Safety and Commodity Specification Division

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Agricultural Marketing Service  
Livestock, Poultry and Seed Program  
Food Safety and Commodity Specifications Division

# Key Issues

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- ▶ Performance-based Specifications
- ▶ Process Control Analysis
- ▶ Raised without Antibiotics
- ▶ *Salmonella* Dublin
- ▶ Case Count vs. Pounds



# ***FOOD SAFETY AND COMMODITY SPECIFICATIONS DIVISION***

*Product Development*



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October 26, 2016

# Agenda

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- ▶ Poultry & Egg Products
- ▶ Beef & Pork Products
- ▶ Aquatic Products



# Poultry and Egg Products

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- ▶ New Product Development
  - ▶ Whole Muscle Chicken Fillet/Chicken Patty
  - ▶ Chicken Drumstick
  - ▶ Turkey Crumble
  - ▶ Egg Patty



# Poultry and Egg Products (cont'd)

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- ▶ Specification Review
  - ▶ Turkey Deli, Sliced
    - ▶ Packaging and sodium reduction
  - ▶ Turkey Taco
    - ▶ Flavor profile
  - ▶ Turkey Roast
    - ▶ Sodium reduction
  - ▶ Frozen Whole Egg
    - ▶ Extension of time to pasteurization
    - ▶ Addition of 2lb. carton





# Poultry and Egg Products (cont'd)

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- ▶ Future Objectives
  - ▶ Increased industry involvement/interaction
  - ▶ Update specification format



# Beef & Pork Products - New

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- ▶ Beef Strips
  - ▶ Lightly Seasoned
- ▶ Canned Chili w/ Beans
  - ▶  $\leq 300$  mg Sodium /100g
  - ▶  $\leq 8$  g Fat /100 g



# Beef & Pork Products - Revisions

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- ▶ Beef Stew
  - ▶  $\leq 325$  mg Sodium /100 g
- ▶ Beef Crumbles
  - ▶  $\leq 300$  mg Sodium /100 g
- ▶ Beef Patties
  - ▶  $\leq 300$  mg Sodium /100 g
- ▶ Pulled Pork
  - ▶  $\leq 385$  mg Sodium /100 g



# Pollock Blocks

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- ▶ Federal Purchase Program Specification (FPPS) for Once-Frozen Alaska Pollock Blocks
- ▶ Section 511 – QUALITY ASSURANCE  
Revise language to clarify inspection and grading requirements.



# Tuna

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- ▶ Updated Federal Purchase Program Specification (FPPS) for Canned/Pouch Tuna published in September 2016
- ▶ Added requirement - All tuna products shall be certified Kosher and include the registered Kashrut certification symbol of the certification agent.



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# Thank you....

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## Questions & Discussion



Agricultural Marketing Service  
Livestock, Poultry and Seed Program  
Food Safety and Commodity Specifications Division

# ***FOOD SAFETY AND COMMODITY SPECIFICATIONS DIVISION***

*ADL Update & Data Review*



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# Agenda

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- ▶ ADL Meeting Summary
- ▶ FY2016 Microbiological Review
- ▶ Supplement 211 & 212 Vendor Performance Handouts
- ▶ Animal Handling & Welfare Review

