



INTERNATIONAL EGG AND POULTRY REVIEW



U. S. Department of Agriculture Agricultural Marketing Service Poultry Programs Market News Branch

U.S. Frozen Chicken in Poland

Poland may become the number one market for U.S. poultry meat in Central Europe. By 1997 U.S. poultry producers had claimed 61% of Poland's 60,000 tons of poultry product imports, compared to 55% in 1996. Poultry imports, mainly frozen chicken parts, rose 39% in 1997. Poland's domestic poultry industry increased 13% in 1997, up to 430,000 tons. They exported 25,000 tons of poultry meat, mostly duck and geese.

Per capita poultry consumption in 1997 was 11.5 kilograms of poultry meat compared to 46.6 kg in the United States. While overall meat consumption is increasing in Poland, poultry meat production is on its own fast track. Increased poultry consumption is due to the popularity of U.S. fast-food restaurants, limited supplies of red meats in 1997, poultry's lower prices (excluding turkey) and health considerations.

Besides the trend towards more poultry consumption, Russia and Ukraine have become the final destination of much poultry originally shipped to Poland. Some major importers estimate only 15 percent of Poland's imported poultry meat is consumed in-country. As much as a third to a half of U.S. poultry is transhipped, escaping the strict import quotas of 8.5 percent of Poland's production the previous year.

Polish poultry consumption is expected to increase 11 percent in 1998 and 4 percent in 1999. Chicken makes up 70 percent of the poultry flocks, with the balance consisting of turkey, goose and duck. In 1997, turkey meat consumption rose from 14 to 16 percent of Poland's poultry meat market share. Most turkey meat is processed and sold in poultry sausage, which competes with pork sausage. Fresh or frozen turkey isn't traditional and costs about three times as much as chicken, and thus is less popular.

Strong demand and stiff competition from imports have forced Poland's own poultry industry to reduce margins and increase efficiency. Large poultry processing plants were privatized, and high-quality genetics introduced, to make the industry competitive. Over 70 percent of Poland's poultry comes from large poultry farms. The balance is household flocks. Most of the larger poultry slaughterhouses also have processing facilities to make sausage and smoked products. Six large companies dominate half the production, most with their own distribution and retailing systems. About 35 percent of all poultry meat consumed in Poland is processed. In 1997, canned poultry meat and sausage amounted to 140,000 tons (12 percent higher than in 1996). Processed production is expected to increase another 12 percent in 1998. Poultry meat imports are restricted by a tariff-rate quota (TRQ) and stiff tariffs. The tariff rate for poultry meat inside the quota of 34,460 tons in 1998 is 30 percent, over its 60 percent.

Source: USDA/FAS/AgExporter

USDA 1999 Foreign Market Development Program

On December 29, 1998, Agriculture Secretary Dan Glickman announced that 26 U.S. trade organizations would receive \$33.5 million for export promotion activities under the Foreign Market Development Program (FMD) for fiscal year 1999. USA Poultry and Egg Export Council was awarded a budget ceiling of \$1,564,498 for fiscal year 1999.

"With the economic troubles in Asia, Russia, and other markets, and increasingly competitive world markets, we're determined to provide American agricultural exporters with resources to help them compete aggressively in overseas markets," Glickman said.

The FMD program is designed to develop, maintain, and expand long-term export markets for U.S. agricultural, fish, and forest products. Under the program, USDA's Foreign Agricultural Service enters into agreements with nonprofit U.S. trade organizations that are nationwide in membership and scope. The FMD has mobilized private sector support and funding for market development activities in more than 100 countries worldwide.

Source: USDA, Foreign Agricultural Service

1997-1998 JAPANESE POWDERED EGG IMPORTS (IN TONS)

Month	Powdered			Total
	Whole Eggs	Powdered Yolks	Powdered Albumen	
1997				
January	205.3	187.0	672.9	1065.2
February	154.6	230.1	594.3	979.0
March	207.2	261.3	643.2	1111.7
April	250.4	210.3	543.4	1004.1
May	136.9	307.0	660.8	1104.7
June	200.4	123.5	655.1	979.0
July	155.8	183.9	754.9	1094.6
August	190.5	211.4	658.8	1060.7
September	141.1	194.8	766.4	1102.3
1997 To-Date	1,642.2	1,909.3	5,949.8	9,501.3
1998				
January	133.7	192.2	598.4	924.3
February	234.6	220.2	698.0	1,152.8
March	296.2	235.4	553.9	1,085.5
April	118.9	250.9	786.0	1,155.8
May	101.7	169.0	500.1	770.8
June	152.9	187.1	655.6	995.6
July	204.0	211.1	807.2	1222.3
August	183.8	133.8	519.2	836.8
September	222.3	299.9	779.3	1301.5
1998 To-Date	1,648.1	1,899.6	5,897.7	9,445.4

Source: ALIC Monthly Statistics

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INSPECTED EGG PRODUCTS

U.S. Exports to Canada, in Pounds (000) (Preliminary)

	Week Ending		Year-To-Date	
	December 26, 1998			

NOT AVAILABLE

U.S. Imports From Canada, in Pounds(000) (Preliminary)

	Week Ending		Year-To-Date	
	December 26, 1998		1998 1997	
Type	1998	1997/1	1998	1997

NOT AVAILABLE

Inspected Shell Eggs

U.S Exports To Canada, In 30-Dozen Cases (Preliminary)

	Week Ending		Year-To-Date	
	December 26, 1998		1998 1997	
	1998	1997/1	1998	1997

NOT AVAILABLE

/1 Comparable Week, to-date figures may not total due to rounding.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 26-Dec-98

PRELIMINARY IN THOUSANDS

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT	HEAVY	TOTAL
	HENS	HENS	HENS

NOT AVAILABLE

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT	HEAVY	TOTAL
	HENS	HENS	HENS

NOT AVAILABLE

SOURCE: AGRICULTURE CANADA, POULTRY DEVELOPMENT DIVISION

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT	HEAVY	TOTAL
	HENS	HENS	HENS

NOT AVAILABLE

CENTRAL REGION PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND FOR DELIVERY WITHIN TWO WEEKS. January 01, 1999

CHICKEN PRICES

	FROZEN		FRESH	
FAT	FOB DELIVERED		FOB DELIVERED	
CONTENT	DOCK		DOCK	
15% OR LESS				
RANGE	-	-	15.00	-
WTD AVG			15.00	

2,040 pounds, this includes 0 pounds for export shipment.

CHICKEN PRICES, WITH ADDED SKIN

15% OR LESS				
RANGE	-	-	10.00-15.25	15.00
WTD AVG	-	-	13.61	15.00

158,400 pounds, this includes 0 pounds for export shipment.

15-20%

RANGE	10.50-20.00	12.00-13.50	8.50-18.00	10.00-14.00
WTD AVERAGE	13.63	12.99	12.34	12.25

1,552,160 pounds, this includes 243,200 pounds for export shipment.

20% OR MORE

RANGE	-	-	-	-
WTD AVG				

0 pounds, this includes 0 pounds for export shipment.

EASTERN REGION PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND FOR DELIVERY WITHIN TWO WEEKS. January 01, 1999

CHICKEN PRICES

	FROZEN		FRESH	
FAT	FOB DELIVERED		FOB DELIVERED	
CONTENT	DOCK		DOCK	
15% OR LESS				
RANGE	15.00-16.00	-	-	17.00
WTD AVG	15.43	-	-	17.00

680,000 pounds, this includes 240,000 pounds for export shipment.

CHICKEN PRICES, WITH ADDED SKIN

15% OR LESS				
RANGE	-	-	-	17.00
WTD AVERAGE	-	-	-	17.00

120,000 pounds, this includes 0 pounds for export shipment.

15-20%

RANGE	-	14.00	11.50-12.00	14.00
WTD AVERAGE	-	14.00	11.88	14.00

1,180,000 pounds, this includes 0 pounds for export shipment.

20% OR MORE

RANGE	-	-	-	-
WTD AVG				

0 pounds, this includes 0 pounds for export shipment.

* INCLUDES THE FOLLOWING STATES: CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

YOUNG TURKEY PARTS - DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS, CENTS PER POUND, FROZEN, EXPORT SALES

EASTERN REGION

Wednesday, December 30, 1998

Thursday, December 31, 1998

	WTD.	AVG.	LBS (000)	OPEN COMM		WTD.	AVG.	LBS (000)	OPEN COMM
WINGS V-TYPE - TOMS	21.00		468						
NECKS - HENS	18.00		40						

CENTRAL REGION

Wednesday, December 30, 1998

Thursday, December 31, 1998

	WTD.	AVG.	LBS (000)	OPEN COMM		WTD.	AVG.	LBS (000)	OPEN COMM
DRUMSTICKS - TOMS	21.00		80						
WINGS FULL-CUT - TOMS	22.00		200						
TAILS	20.00		40						
THIGH MEAT - FROZEN	61.00		40	200					

WESTERN REGION

Wednesday, December 30, 1998

Thursday, December 31, 1998

	WTD.	AVG.	LBS (000)	OPEN COMM		WTD.	AVG.	LBS (000)	OPEN COMM
WINGS V-TYPE - TOMS	24.62		674						