



# INTERNATIONAL EGG AND POULTRY REVIEW

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## Poultry Production in Italy

Total Italian poultry meat production in 1998 increased 1.4 percent from 1997 levels mainly due to a 6.7% increase in turkey meat production. Poultry meat consumption in 1999 is forecast to decline about 7 percent due to the dioxin scandal but should return to previous levels in 2000. Poultry production is expected to follow a similar pattern. The egg sector will also be affected by the dioxin scandal in 1998.

During 1998, the average wholesale price for broiler meat was 4 percent below 1997 levels. In 1999 prices are expected to be negatively affected by the dioxin scandal. The Italian poultry meat trade balance was largely positive in 1998. Italian exports increased significantly especially for turkey meat.

The situation of the Italian egg industry is similar to that of the Italian poultry meat industry. An increase in production in 1998 (+1.1 %) resulted in a decline in prices (-2.96 %). This is just a continuation of a negative trend affecting the sector since 1997, after a brief positive market situation following the BSE crisis.

In 1999, Italian egg production will also be affected by the "Dioxin" scandal even though Italian egg production is considered to be safe. As consumption and prices drop, egg production is expected to decline. Per capita egg consumption dropped from 211 in 1998 to an estimated 204 in 1999.

### Export Trade in Metric Tons

	Chicken		Turkey	
	1997	1998	1997	1998
Exports for			Exports for	
United Kingdom	4,500	6,000	Germany	17,500 24,000
Germany	3,000	4,000	Spain	6,700 9,000
Netherlands	2,500	3,000	Belgium-Lux	5,200 7,000
Other EU	13,000	14,000	Other EU	12,600 18,000
Ukraine	3,000	3,000	Others	6,000 8,000
Croatia	1,500	2,000	Grand Total	48,000 66,000
Albania		1,500		
Others	5,500	2,500		
Grand Total	33,000	36,000		

Italy imported 11,000 metric tons of chicken in 1998, unchanged from 1997. Hungary and Brazil were the two main suppliers.

Imports of turkey totaled 7,000 metric tons in 1998 compared to 5,000 in 1997. In 1998 most imports came from the United Kingdom, France and Hungary.

In 1998 Italy exported 195 million eggs, up from 185 million in 1997. Most trading was with Albania and within the EU. Imports were at 516 million eggs in 1998, compared to 600 million in 1997, and were almost entirely from within the EU.

Source: USDA/Foreign Agricultural Service Attache Report

## U.S. Partially Lifts Embargo of North Korea

This month the United States lifted key parts of a trade embargo against North Korea in response to North Korea's pledge to refrain from test-firing long-range missiles. The sanctions date to 1950, when North Korea invaded South Korea. Trade in consumer goods and raw materials will now be legal and investment in agriculture will be allowed. U.S. trade would likely be limited due to North Korea's economic problems. North Korea's economy is among the world's most primitive.

North Korea, officially Democratic People's Republic of Korea, is the world's most centrally planned economy. Unable to produce enough food to be self sufficient, North Korea depends on food imports. Agricultural land in this poor, mountainous country is collectivized and only 15 percent of the land is arable. There are fertilizer shortages and farm machinery remains idle due to lack of fuel and spare parts. Oxen are often used to pull plows. Several years of unfavorable weather and underlying problems in the economy and agriculture have resulted in a substantial decrease of food supplies. Crop yields are much lower than in other countries. Rice yields in North Korea have averaged 1.47 tons per acre over the last 10 years compared to 2.52 in South Korea. Corn yields averaged 1.30, well below China's estimated average yield of 1.89 tons per acre.

Various Sources

## 1998-1999 JAPANESE POWDERED EGG IMPORTS (IN TONS)

Month	Powdered			Total
	Whole Eggs	Powdered Yolks	Powdered Albumen	
1998				
January	133.7	192.2	598.4	924.3
February	234.6	220.2	698.0	1152.8
March	296.2	235.4	553.9	1085.5
April	118.9	250.9	786.0	1155.8
May	101.7	169.0	500.1	770.8
June	152.9	187.1	655.6	995.6
1998 To-Date	1,038.0	1,254.8	3,792.0	6,084.8
1999				
January	200.2	269.1	912.5	1,381.8
February	201.6	251.3	566.2	1,019.1
March	233.3	121.9	740.6	1,095.8
April	249.6	175.8	881.1	1,306.5
May	130.9	136.0	874.5	1,141.4
June	164.4	53.3	809.7	1,027.4
1999 To-Date	1,180.0	1,007.4	4,784.6	6,972.0

Source: ALIC Monthly Statistics

**INSPECTED EGG PRODUCTS**

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

Type	Week Ending September 18, 1999		Year-To-Date	
	1999	1998 /1	1999	1998
Liquid	343	338	10,115	10,846
Frozen	0	0	6	50
Dried	0	0	464	537
Total	343	338	10,585	11,433

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

Type	Week Ending September 18, 1999		Year-To-Date	
	1999	1998 /1	1999	1998
Liquid	32	124	3,437	3,074
Frozen	5	4	360	163
Dried	0	0	166	235
Total	37	128	3,963	3,472

**Inspected Shell Eggs**

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

Type	Week Ending September 18, 1999		Year-To-Date	
	1999	1998 /1	1999	1998
Jumbo	93	0	1,091	1,195
Extra Large	2,915	350	30,279	27,207
Large	3,233	1,975	99,005	81,090
Medium	750	0	36,560	42,226
Ungraded	22,560	15,488	448,623	226,043
Misc	0	0	6,978	6,133
Total	29,551	17,813	622,536	383,894

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

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

**CENTRAL REGION** PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND FOR DELIVERY WITHIN TWO WEEKS. 24-SEP-99

**CHICKEN PRICES**

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

0 pounds, this includes 0 pounds for export shipment.

**CHICKEN PRICES. WITH ADDED SKIN**

15% OR LESS				
RANGE	18.00-19.00	20.00	14.00-15.00	-
WTD AVERAGE	18.62	20.00	14.33	
188,200 pounds, this includes 0 pounds for export shipment.				
15-20%				
RANGE	13.00-17.50	15.00-22.00	10.50-14.50	13.50-19.00
WTD AVERAGE	15.35	16.89	12.25	14.13
3,269,000 pounds, this includes 1,142,400 pounds for export shipment.				
20% OR MORE				
RANGE	15.00	-	-	-
WTD AVERAGE	15.00			

30,000 pounds, this includes 0 pounds for export shipment.

\* INCLUDES THE FOLLOWING STATES: AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**LIVE POULTRY SLTRD UNDER INSPECTION** 18-Sep-99  
PRELIMINARY

**U.S. FOWL SLAUGHTERED DOMESTICALLY (000'S)**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	HEAD	2,014	1,484
LAST WEEK	1,583	1,368	2,951
SAME WEEK YR AGO	1,863	1,240	3,103
TO-DATE/1999	78,122	51,119	129,241
TO-DATE/1998	77,071	46,581	123,652

**U.S. FOWL SLAUGHTERED IN CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	HEAD	409	0
LAST WEEK	300	0	300
SAME WEEK YR AGO	568	0	568
TO-DATE/1999	17,482	181	17,663
TO-DATE/1998	20,092	266	20,358

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

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

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	HEAD	2,423	1,484
LAST WEEK	1,883	1,368	3,251
SAME WEEK YR AGO	2,431	1,240	3,671
TO-DATE/1999	95,604	51,300	146,904
TO-DATE/1998	97,163	46,847	144,010

**EASTERN REGION** PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND FOR DELIVERY WITHIN TWO WEEKS. 24-SEP-99

**CHICKEN PRICES**

FAT CONTENT	-----FROZEN-----		-----FRESH-----	
	FOB DOCK	DELIVERED	FOB DOCK	DELIVERED
15% OR LESS				
RANGE	16.00-18.00	-	17.00	-
WTD AVERAGE	16.70		17.00	

1,370,800 pounds, this includes 320,000 pounds for export shipment.

**CHICKEN PRICES. WITH ADDED SKIN**

15% OR LESS				
RANGE	-	-	-	16.00
WTD AVERAGE				16.00
280,000 pounds, this includes 0 pounds for export shipment.				
15-20%				
RANGE	13.75-17.00	17.00-18.00	13.00-14.00	13.00-14.50
WTD AVERAGE	16.32	17.58	13.54	13.79
1,806,200 pounds, this includes 544,000 pounds for export shipment.				
20% OR MORE				
RANGE	-	-	13.50	-
WTD AVERAGE			13.50	

200,000 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

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT**

FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS

SEPTEMBER 24, 1999

Undertone fully steady to firm hen 2-joint wings and tom necks for October with trading at higher price levels. Thigh meat undertone fully steady with the increased fresh trading due in part to last week's hurricane. Tom breast meat undertone steady to barely steady on fresh, frozen barely steady at best with trading at 155 cents delivered November. Rib breast trading light on Grade A 12-14 lb. at 138 and 14-16 lb. 148, plant grade 10-12 lb. at 120 and 12-14 lb. 135, fresh destrapped tenderloins (part loads) 174-178. Fresh thigh meat (1 load) 63 cents delivered export. Line run fresh +20 lb. canner pack 52 cents.

**FRIDAY, SEPTEMBER 24, 1999**

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	17.00-19.00		17.87	92	18.44	1,172
WINGS FULL-CUT - TOMS		W	18.00	52	18.00	52
WINGS, V-TYPE, TOM		W	22.50	104	22.50	104
TAILS		W	13.00	240	13.00	240
MECHANICALLY SEPARATED 4/	23.00		23.00	40	20.44	424
THIGH MEAT - FROZEN	61.00		61.00	40	58.81	404

**THURSDAY, SEPTEMBER 23, 1999**

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	16.00		16.00	80
WINGS FULL-CUT - TOMS		W	18.00	52
WINGS, V-TYPE, TOM		W	22.50	104
TAILS		W	13.00	240
MECHANICALLY SEPARATED 4/	20.50		20.50	160
THIGH MEAT - FROZEN		W	58.25	208

**WEDNESDAY, SEPTEMBER 22, 1999**

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	17.50-19.75		19.15	600
WINGS FULL-CUT - TOMS	18.00		18.00	52
WINGS, V-TYPE, TOM	22.50		22.50	104
TAILS	13.00		13.00	240
MECHANICALLY SEPARATED 4/	19.50-22.00		19.95	224
THIGH MEAT - FROZEN	58.00-59.00		58.25	208

**TUESDAY, SEPTEMBER 21, 1999**

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	18.00		18.00	400
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	22.50	104
TAILS		R	13.00	400
MECHANICALLY SEPARATED 4/		F	21.25	20
THIGH MEAT - FROZEN		M	59.00	156

**MONDAY, SEPTEMBER 20, 1999**

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		F	17.00	120
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	22.50	104
TAILS		R	13.00	400
MECHANICALLY SEPARATED 4/		F	21.25	20
THIGH MEAT - FROZEN	59.00		59.00	156

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.