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Poultry Programs

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Thailand Poultry

Driven by broiler meat exports in 2001, Thailand's total broiler meat production is forecast to increase further in 2002. In addition, the overall production in broiler farming should continue to improve, due to the greater use of evaporated cooling systems by integrated producers and improved broiler genetics. Under the same farm conditions and prevailing prices for major inputs, the introduction of new chicken varieties may reduce their cost of production for live broilers by five to seven percent in 2002. Chick production in 2001 has increased to 17-18 million birds/week from an average 15-16 million birds/week in 2000.

Thailand's Broiler Meat Exports in 2000 and 2001 (Jan-May)

Country	Selected Countries (in metric tons)		
	2001	2000	% Change
Japan	69,354	65,921	5
Singapore	8,519	5,827	46
China	5,463	2,210	147
Hong Kong	3,078	3,825	-20
S. Korea	13,880	2,263	513
Malaysia	3,083	1,378	124
Germany	23,804	13,287	79
Netherlands	21,286	12,185	75
U.K.	16,414	8,884	85

Although the devaluation in Brazilian currency and the possible abolishment of import bans for Chinese chicken in the EU and Japan would generate intense export competition, trade sources believe that Thailand's chicken meat exports in 2002 should maintain its growth of 10-12 percent over the 2001 level. This is because the EU market for chicken meat should further expand and Thai processors have successfully reduced their cost of production.

Japan and European countries remain the major markets for Thai broiler meat in 2001. In the first five months of 2001, Japan accounted for 41 percent of total broiler meat export (against 56 in 2000). Meanwhile, the EU accounted for 38 percent of total exports. In addition to providing more than 200 items of product for export, some processors are able to satisfy such special conditions as free of antibiotics, no use of animal protein ingredients, and no use of growth promoters. All processing plants now have certificates on ISO 9000 and HACCP standard. Thai chicken processors are also able to abide by the EU's directives on animal welfare requirement for export eligibility after they began to improve their farm and plant management in recent years.

Thailand has been a promising market for U.S. turkey meat. Although the official imports of turkey meat (reported by the Thai Customs Department) were only US\$ 95,000 in value in 2000, trade sources indicated that the actual figures highly exceeded this number due to the prevailing smuggling activities in Thailand. About 90 percent of total imports is currently supplied by the U.S.

Source: USDA/Foreign Agriculture Service

Republic of Korea

Korea's poultry production and imports are on the increase in 2001 primarily due to food scares in Europe (BSE and FMD) which drove consumers to poultry as an alternative meat. Consequently, domestic production and import volume expanded rapidly to meet the rising demand despite the slowing Korean economy. Aggressive marketing efforts enabled Thailand to capture a large share of the Korean market at the expense of U.S. poultry. Turkey production is insignificant. Mechanically deboned turkey meat has been a primary raw ingredient in sausage for many years, but the market is shrinking due to greater competition from domestic pork that stayed in the market when Korean pork was banned from international markets for FMD.

Korean Imports of Poultry Meat in metric tons

	Chicken		Turkey	
	Jan-Dec 2000	Jan-Jun 2001	Jan-Dec 2000	Jan-Jun 2001
U.S.	53,610	23,883	5,912	2,614
France	-	-	142	96
Canada	333	24	809	431
Thailand	10,145	14,702	0	48
China	1,862	2,433	6,863	3,189
Denmark	106	94		
Australia	25	0		
U.K.	0	22		
Total	66,081	41,227		

In July 2001 the Ministry of Agriculture and Forestry released the "Overall Plan for Development of Poultry Industry." This 10 year plan has a target flock size, of both layers and broilers, of 60 million birds by 2010. At this level, Korea would maintain a self-sufficiency ratio for poultry meat at 77.6 percent and for eggs at 100 percent. The plan calls for chicken exports totaling 60,000 MT by 2010, mainly to Japan. The plan will introduce a grading system to improve chicken and egg quality and a vaccination program to eradicate New Castle disease. By 2003, the full industry will be required to have a HACCP program in place.

Korean Imports of Egg Products in metric tons

	Yolk		Albumin	
	Dried	Other	Dried	Other
Jan-Dec 2000	230	571	188	479
Jan-Jun 2001	133	448	96	322

Korea's egg industry is emerging from the sluggish market that depressed production in 2000. Low production due to snow damage early this year and strong demand for eggs resulted in a recovery in farm-gate prices. Layer numbers, in turn, rose in the second quarter as farmers were encouraged by rising farm-gate prices. Due to low production and high prices, imports of egg products are on the rise.

Source: USDA/Foreign Agriculture Service

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Inspected Egg Products-U.S. & Canada Export/Import Trade

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

Week Ending Aug 18, 2001	Year-To-Date			
	2001	2000 /1	2001	2000
Liquid	312	129	7,183	4,340
Frozen	0	0	78	126
Dried	0	0	40	340
Total	312	129	7,301	4,806

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

Week Ending Aug 18, 2001	Year-To-Date			
	2001	2000/1	2001	2000
Liquid	174	61	3,487	3,817
Frozen	33	3	847	511
Dried	0	0	375	654
Total	207	64	4,709	4,982

Inspected Shell Eggs

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

Week Ending Aug 18, 2001	Year-To-Date			
	2001	2000 /1	2001	2000
Jumbo	0	66	87	1,247
Extra Large	3,390	420	37,507	31,354
Large	3,629	1,520	79,623	90,657
Medium	750	1,062	31,228	23,496
Ungraded	8,130	16,380	236,600	222,364
Misc	3,000	0	61,029	7,887
Total	18,899	19,448	446,074	377,005

/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 MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 24-AUG-2001
 PRICES VOLUME
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

PRICES VOLUME
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	- 18.00-19.00		163,200	-
WTD AVERAGE		18.75		
15-20%				
RANGE	15.00-18.00	14.25-18.00	1,387,200	326,400
WTD AVERAGE	16.82	15.59		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of 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 W/E 18-Aug-01

(PRELIMINARY) **U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,795	1,466	3,261
LAST WEEK	1,571	1,513	3,084
SAME WEEK YR AGO	1,815	1,526	3,341
TO-DATE/2001	58,236	45,364	103,600
TO-DATE/2000	64,400	47,447	111,847

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	81	8	89
LAST WEEK	239	0	239
SAME WEEK YR AGO	400	32	432
TO-DATE/2001	14,574	227	14,801
TO-DATE/2000	15,938	413	16,351

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

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

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,876	1,474	3,350
LAST WEEK	1,810	1,513	3,323
SAME WEEK YR AGO	2,215	1,558	3,773
TO-DATE/2001	72,810	45,591	118,401
TO-DATE/2000	80,338	47,860	128,198

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 24-AUG-2001
 PRICES VOLUME
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	19.00	-	200,000	-
WTD AVERAGE	19.00			

CHICKEN, WITH SKIN ADDED

PRICES VOLUME
 (Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.50-19.00	17.50-20.00	787,000	266,000
WTD AVERAGE	17.75	18.09		
15-20%				
RANGE	16.00-18.50	14.00-18.00	1,468,800	728,000
WTD AVERAGE	17.86	16.03		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of 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 AS OF 24 AUGUST 2001.

Trade sentiment was steady to firm on fresh tom breast meat. Demand was fair to good, however, a less aggressive buyer interest was starting to be noted for pre-holiday needs. Offerings of fresh tom breast meat ranged short to adequate with offers not as tight when compared to early week. Fresh destrapped tenderloins, wing meat, breast trim and scapula were steady to fully steady for the light offerings. Frozen destrapped tenderloins and tom breast meat undertone was steady for the adequate offerings. Thigh meat undertone mixed with Russian approved product strong and offers noted at higher prices while non-Russian approved was unsettled with spot trading noted at lower prices. Trading was active on frozen thigh meat and mechanically separated turkey for export, balance light. For domestic: hearts 29, Grade A non-basted 10-14 lb. breasts 115, plant grade basted 18-20 lb. breasts 107 cents delivered. For export: livers 21, tom necks 28, fresh tom drums 30 cents delivered.

FRIDAY, AUGUST 24, 2001

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	30.00-31.00		30.93	560	30.52	1,260
WINGS FULL-CUT - TOMS	29.00		29.00	104	28.01	304
WINGS, V-TYPE, TOM		T	28.25	208	28.50	312
TAILS	28.00		28.00	104	28.00	184
MECHANICALLY SEPARATED 2/	16.00-17.00		16.61	408	16.79	792
THIGH MEAT - FROZEN	57.00-61.00		59.29	560	60.29	1,413

THURSDAY, AUGUST 23, 2001

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.00		29.00	40
WINGS FULL-CUT - TOMS		M	27.50	200
WINGS, V-TYPE, TOM		T	28.25	208
TAILS		M	28.00	80
MECHANICALLY SEPARATED 2/	15.00-16.00		15.28	144
THIGH MEAT - FROZEN	64.00		64.00	80

WEDNESDAY, AUGUST 22, 2001

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	31.00		31.00	40
WINGS FULL-CUT - TOMS		M	27.50	200
WINGS, V-TYPE, TOM		T	28.25	208
TAILS		M	28.00	80
MECHANICALLY SEPARATED 2/		M	18.00	240
THIGH MEAT - FROZEN	60.00-61.00		60.78	184

TUESDAY, AUGUST 21, 2001

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	31.00		31.00	260
WINGS FULL-CUT - TOMS		M	27.50	200
WINGS, V-TYPE, TOM	28.00-28.50		28.25	208
TAILS		M	28.00	80
MECHANICALLY SEPARATED 2/		M	18.00	240
THIGH MEAT - FROZEN	61.00		61.00	269

MONDAY, AUGUST 20, 2001

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.00-31.50		29.67	360
WINGS FULL-CUT - TOMS	27.50		27.50	200
WINGS, V-TYPE, TOM	29.00		29.00	104
TAILS	28.00		28.00	80
MECHANICALLY SEPARATED 2/	18.00		18.00	240
THIGH MEAT - FROZEN	60.00-61.00		60.25	320

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.

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