



INTERNATIONAL EGG AND POULTRY REVIEW

ISSN 1522-5100



U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

Russia's Poultry Situation

Broiler production in 2002 is anticipated to increase 9 percent but will only partially fulfill the increase in domestic consumption. Broiler imports in 2002 are forecast to increase 5 percent to 1.35 million tons driven by strong domestic demand from a strengthening economy. Russia's broiler imports sharply increased in 2001 as broiler meat suited consumer demand for meat protein at attractive prices. The increased broiler consumption is forecast to continue in 2002 despite the recent import ban on U.S. poultry. In 2001, U.S. broiler exports to Russia, the largest market for the United States, were valued at \$635 million. However, U.S. broiler exports to Estonia and Latvia, which are for both direct consumption and re-exports to Russia, accounted for an additional \$30 million.

U.S. Russian Poultry Trade Talks

United States and Russian poultry trade talk apparently are progressing, but according to some, at a slow pace. Russian Agriculture Minister Alexei Gordeyev recently announced his unwillingness to compromise over its imports of U.S. poultry unless they satisfy Moscow's safety demands.

An Agriculture Ministry spokesman restated on Friday, June 28, 2002 that Russia would reimpose a ban on poultry imports on August 1 if the U.S. failed to produce a new veterinary certificate. The lifting of the ban was subject to conditions, including elaboration of a new U.S. certificate by June 30.

Sources: Various News Articles

	1996	1997	1998	1999	2000	2001(p)	2002(f)
(1,000 tons ready to cook equivalent)							
Production	290	200	280	350	380	430	470
Imports	1,102	1,283	1,032	930	949	1,280	1,350
Consumption	1,379	1,472	1,301	1,275	1,324	1,705	1,814
Exports	13	11	11	5	5	3	6

p - projected
f - forecast

Source: USDA/FAS

Japanese Powdered Egg Imports (in tons)

Month	Powdered			Total
	Whole Eggs	Powdered Yolks	Powdered Albumen	
2001				
January	233.2	199.3	910.1	1,342.6
February	177.9	172.4	758.2	1,108.5
March	211.1	194.9	905.1	1,311.1
2001 To-Date	3,008.0	2,261.2	9,801.1	15,070.3
2002				
January	253.1	187.4	841.7	1,282.2
February	261.9	191.7	481.0	934.6
March	251.1	244.7	665.7	1,161.5
2002 To-Date	766.1	623.8	1,988.4	3,378.3

Source: ALIC Monthly Statistics

Russian Poultry Duties

Russia decided on July 1 that they would impose special duties on imported poultry. The duties are still undecided and could be determined in four weeks at a meeting of the Russian commission on protective measures. These duties would be on top of the current 25% for poultry. German Gref, the Russian Economic Development and Trade Minister, reported that the special duties will be in place until at least the end of the year to bolster the domestic food industry in the face of the current high level of imported products. German Gref also announced a preliminary investigation into large losses by Russian poultry producers because of imports.

Russia had previously announced that it may propose to raise its tariffs on poultry from 25% to approximately 33%, beef and pork from 15% to 25% and 80%, respectively. Agriculture Ministry First Deputy Minister Anatoly Mikhalov said the increase would be in response to a European Union proposal to increase tariffs on grain imports.

Russia currently accounts for 41% of U.S. chicken exports, 17% of turkey exports and 1% of poultry production. As for meat, Russia accounts for a fraction of beef exports and 5% of pork exports.

Sources: Feedstuffs and Other Various News Articles

RUSSIA BROILER IMPORTS (in metric tons)

	1997	1998	1999	2000	2001
Parts	1,156,650	936,112	897,044	906,299	1,194,574
US Market Share	90%	91%	87%	86%	90%
Grand Total*	1,265,802	1,020,039	929,912	943,455	1,280,876
US Market Share	84%	85%	85%	83%	85%

* Includes whole, parts & prepared chicken

Source: USDA/FAS

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

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

Week Ending June 29, 2002	Year-To-Date			
	2002	2001 /1	2002	2001
Type				
Liquid	351	228	9,007	5,626
Frozen	0	38	21	78
Dried	0	0	190	40
Total	351	266	9,218	5,744

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

Week Ending June 29, 2002	Year-To-Date			
	2002	2001 /1	2002	2001
Type				
Liquid	112	99	2,743	2,737
Frozen	149	5	1,759	643
Dried	168	0	2,326	301
Total	429	104	6,828	3,681

Inspected Shell Eggs

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

Week Ending June 29, 2002	Year-To-Date			
	2002	2001 /1	2002	2001
Jumbo	0	0	1,155	87
Extra Large	1,525	0	14,219	23,022
Large	2,400	3,958	55,926	61,341
Medium	1,680	2,540	24,877	24,568
Ungraded	2,430	11,010	178,285	176,870
Misc	0	3,450	11,224	44,354
Total	8,035	20,958	285,686	330,242

/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.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 29-Jun-02
 (PRELIMINARY) **U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,572	1,582	3,154
LAST WEEK	1,703	1,517	3,220
SAME WEEK YR AGO	1,931	1,418	3,349
TO-DATE/2002	47,075	34,933	82,008
TO-DATE/2001	46,788	35,014	81,802

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	256	0	256
LAST WEEK	402	0	402
SAME WEEK YR AGO	310	0	310
TO-DATE/2002	8,408	38	8,446
TO-DATE/2001	12,476	192	12,668

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	1,828	1,582	3,410
LAST WEEK	2,105	1,517	3,622
SAME WEEK YR AGO	2,241	1,418	3,659
TO-DATE/2002	55,483	34,971	90,454
TO-DATE/2001	59,264	35,206	94,470

SOURCE: USDA/AMS PLTRY PROGRAMS, MRKT NEWS BR.

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.

05-JUL-2002

CHICKEN	PRICES		VOLUME	
	(Cents per Pound)			
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

FAT	PRICES		VOLUME	
	(Cents per Pound)			
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.00-18.00	13.00	120,800	-
WTD AVERAGE	17.00	13.00		

15-20%

RANGE	12.50-13.50	10.00-13.00	1,285,200	81,600
WTD AVERAGE	13.00	11.46		
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

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.

05-JUL-2002

CHICKEN	PRICES		VOLUME	
	(Cents per Pound)			
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

FAT	PRICES		VOLUME	
	(Cents per Pound)			
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	12.00-16.00	13.50-14.00	964,000	364,000
WTD AVERAGE	15.43	13.54		

15-20%

RANGE	12.00-15.50	9.00-15.00	858,000	208,000
WTD AVERAGE	13.75	11.65		
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 5 JULY 2002.

The undertone on fresh tom breast meat and destrapped tenderloins was steady to sometimes fully steady with some strength being noted for post holiday plant start-ups, steady on the balance of fresh white meat. The frozen white meat undertone was mostly steady on frozen tom breast meat, scapula and regular breast trim; barely steady on ground breast trim; and barely steady to weak on wing meat. White meat inquiry was light to instances fair for post holiday needs. Offerings of fresh white meat ranged light to adequate, frozen adequate to ample. Domestic and export trading was slow on all items. Some hen necks traded at 15 cents delivered export.

FRIDAY, JULY 05, 2002

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	22.00		22.00	104	22.56	144
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		F	16.65	616		
MECHANICALLY SEPARATED 2/						
THIGH MEAT - FROZEN	52.00		52.00	80	52.00	120

*****NOTICE***
DUE TO FOURTH OF JULY HOLIDAY
NO REPORT ISSUED**

WEDNESDAY, JULY 03, 2002

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	24.00		24.00	40
WINGS FULL-CUT - TOMS		W	22.50	40
WINGS, V-TYPE, TOM				
TAILS		F	16.65	616
MECHANICALLY SEPARATED 2/		W	18.50	80
THIGH MEAT - FROZEN	52.00		52.00	40

TUESDAY, JULY 02, 2002

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		R	24.00	80
WINGS FULL-CUT - TOMS		W	22.50	40
WINGS, V-TYPE, TOM				
TAILS		F	16.65	616
MECHANICALLY SEPARATED 2/		W	18.50	80
THIGH MEAT - FROZEN		F	44.50	400

MONDAY, JULY 01, 2002

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		R	24.00	80
WINGS FULL-CUT - TOMS		W	22.50	40
WINGS, V-TYPE, TOM				
TAILS		F	16.65	616
MECHANICALLY SEPARATED 2/		W	18.50	80
THIGH MEAT - FROZEN		F	44.50	400

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.