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Agricultural Marketing Service

Poultry Programs

Market News Branch

Brazil

Post projects broiler exports in 2003 to drop by 4 percent in volume. Excess chicken meat in the world market resulted in lower export prices the first half of 2002 and the increase in the import tariff in the European Union for Brazilian broiler parts from 15.4 to 70 percent, because of the change in the salt content for parts from 1.2-1.5 to 1.9 percent. The change in the salt content forced the European Union officials to change the HTS category of Brazilian broiler parts. As a result, beginning October 1, 2002 Brazilian exporters will pay a 70 percent import tariff for broiler parts. This measure will affect 85 percent of all Brazilian exports to the European Union. Brazilian trade sources believe that Russian officials will eventually impose import quotas and higher import tariffs, which will likely cut Brazilian exports to Russia by 50 percent.

Source: USDA/Foreign Agricultural Service

India

India's broiler sector is expected to grow by 15 percent in 2002. Production is estimated at 1.4 million tons, due to increasing demand, better feed availability and affordable prices supported by the increasing trend of integration. Production is forecast to accelerate in 2003 to 1.5 million tons of meat due to increasing demand, the beginning of export oriented production, and favorable feed situation in the country.

Source: USDA/Foreign Agricultural Service

Saudi Arabia

In 2002, the Kingdom's poultry meat imports are forecast at 390,000 metric tons, down 2.5 percent from the 2001 level of 400,000 due to the temporary ban imposed on French chicken imports in late July 2002. The ban on French poultry imports is expected to further increase the Brazilian poultry exports to Saudi Arabia this year. With more than 60 percent market share in recent years, Brazil has remained the leading supplier of frozen broilers to the Kingdom, followed by France and China (for deboned chicken). the U.S. has been a distant fourth.

Brazilian poultry exports to the Kingdom reached 255,989 mt in 2001 (an increase of 23 percent compared to 2000). French exports fell from 113,327 mt in 2000 to 107,175 mt in 2001. In recent years, French exports have been declining due to lack of price competitiveness. Poultry meat imports from China increased about 82 percent, from 18,475 mt in 2000 to 33,534 mt in 2001. Poultry meat imports from the U.S. decreased 70 percent in 2001 compared to 2000, dropping to 2,109 mt from 6,952 mt. The main factor for the huge decline in U.S. exports is the inability of American exporters to offer competitive priced poultry meat derived from poultry fed on a 100 vegetable protein diet.

Source: USDA/Foreign Agricultural Service

New Russian Veterinary Certificate

USDA Food Safety and Inspection Service updated the Library of Export Requirements for Russia on September 4, 2002. Rurrev55 9/4/2002 covers testing requirements and procedures, inspection guidelines and process, hygienic requirements, and documentation and procedures.

A new form is "A Weekly Certification from APHIS-Accredited Veterinarian for Export of Poultry Meat to the Russian Federation." In addition to covering the health status of commercial poultry flocks, the form certifies the poultry did not receive feed containing hormones, antibiotics or other preparations intended for stimulating growth other than bambarmycin, bacitracin or virginiamycin and that the poultry did not receive tetracycline, chlortetracycline or oxytetracycline.

Source: USDA/FSIS, <http://www.fsis.usda.gov/OFO/export/explib.htm>

Argentina's Meat Exports and Imports

During the first seven months of 2002, Argentina's exports of fresh and processed meats totaled US\$275 million. Beef accounted for 85 percent of meat exports, horsemeat exports were valued at \$26 million and poultry and rabbit meats totaled \$6 million.

The value of meat exports fell from a high of \$1,109,932 f.o.b. in 1985 to \$304,036 f.o.b. in 2001. However, as a percent of total meat exports, the value of poultry exports climbed from .2 percent in 1985 to 3.85 percent in 2001.

Poultry's share of imports has fallen from 35.96 percent in 1995 to 23.37 percent in 2001.

Source: Boletin quincenal Mercados Ganaderos SAGPyA

U.S. Chicken Leg Quarter Exports in metric tons

	Jan-Jun 2002						
	Jan	Feb	Mar	Apr	May	Jun	Total
N. America	1,558	1,845	1,340	2,512	1,964	1,478	10,697
Caribbean	1,855	4,346	1,342	4,522	6,585	11,463	30,113
C. America	2,665	2,716	2,995	2,910	3,527	3,183	17,995
S. America	977	491	714	943	593	520	4,237
EU	1,871	492	879	1,938	3,928	2,970	12,077
W. Europe	241	-	-	-	-	71	312
FSU	82,804	44,225	33,333	10,138	40,735	52,860	264,095
E. Europe	1,829	1,607	1,972	5,563	10,714	8,905	30,590
MidEast	1,683	3,450	3,194	6,685	7,327	3,676	26,015
Other Africa	3,657	1,437	5,350	4,295	9,840	5,379	29,958
Other Asia	9,639	11,130	12,421	12,712	12,874	8,002	66,777
Oceania	327	643	548	356	993	619	3,486
World	109,106	72,382	64,087	52,574	99,079	99,123	496,351

Source: Commerce Department, Census Bureau

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

U.S. Exports to Canada, in Pounds (000) (Preliminary)
 Week Ending August 31, 2002 Year-To-Date

	2002	2001 /1	2002	2001
Liquid	392	285	12,070	7,778
Frozen	0	0	21	78
Dried	1	0	387	40
Total	393	285	12,478	7,896

U.S. Imports From Canada, in Pounds (000) (Preliminary)
 Week Ending August 31, 2002 Year-To-Date

	2002	2001/1	2002	2001
Liquid	204	76	4,472	3,697
Frozen	67	66	2,883	1,003
Dried	70	72	3,428	473
Total	341	214	10,783	5,173

Inspected Shell Eggs

U.S Exports To Canada, In 30-Dozen Cases (Preliminary)
 Week Ending August 31, 2002 Year-To-Date

	2002	2001 /1	2002	2001
Jumbo	0	0	1,193	87
Extra Large	475	2,550	38,463	41,911
Large	4,629	3,109	95,690	84,891
Medium	1,201	240	40,284	32,218
Ungraded	5,940	10,410	193,685	257,210
Misc	120	1,495	13,692	64,774
Total	12,365	17,804	383,007	481,091

/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.

06-SEP-2002
CHICKEN — 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	-	13.00-14.00	40,800	-
WTD AVERAGE		13.50		
15-20%				
RANGE	11.00-13.00	11.00-14.00	1,478,400	530,400
WTD AVERAGE	11.18	11.58		
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 31-Aug-02
 (PRELIMINARY) **U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	—————THOUSANDS—————		
HEAD	1,848	1,640	3,488
LAST WEEK	1,779	1,650	3,429
SAME WEEK YR AGO	1,924	1,410	3,334
TO-DATE/2002	61,890	48,478	110,368
TO-DATE/2001	61,856	48,196	110,052

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	—————THOUSANDS—————		
HEAD	271	0	271
LAST WEEK	203	4	207
SAME WEEK YR AGO	408	0	408
TO-DATE/2002	10,767	223	10,990
TO-DATE/2001	15,693	224	15,917

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	2,119	1,640	3,759
LAST WEEK	1,982	1,654	3,636
SAME WEEK YR AGO	2,332	1,410	3,742
TO-DATE/2002	72,657	48,701	121,358
TO-DATE/2001	77,549	48,420	125,969

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

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.

06-SEP-2002
CHICKEN — 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	14.50-17.00	13.50-14.00	1,097,500	519,500
WTD AVERAGE	16.37	13.72		
15-20%				
RANGE	12.00-13.00	10.00-16.00	1,126,000	80,000
WTD AVERAGE	12.52	13.69		
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 6 SEPTEMBER 2002.

Domestic activity was mostly light. A moderate volume of fresh tom breast meat moved at steady to slightly higher prices and supplies were adequate for the current demand. Tom drums moved into a closer balance and traded at steady to higher trending prices. Grade A non-basted 10-16 lb. breasts moved at 102 and plant grade non-basted 10-16 lb breasts at 92 cents. Export activity was fair at best. Fresh thigh meat traded at 55 cents to the border and frozen hen drums at 18 cents.

FRIDAY, SEPTEMBER 06, 2002

<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	22.00		22.00	52	19.34	432
WINGS FULL-CUT - TOMS	18.00		18.00	104	17.86	364
WINGS, V-TYPE, TOM		W	26.00	104	26.00	104
TAILS		T	14.25	156	14.25	156
MECHANICALLY SEPARATED 2/		R	17.00	104	17.29	202
THIGH MEAT - FROZEN	50.00-51.00		50.50	320	51.01	798

THURSDAY SEPTEMBER 05, 2002

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	20.00-22.00		20.67	120
WINGS FULL-CUT - TOMS		W	18.00	52
WINGS, V-TYPE, TOM		W	26.00	104
TAILS		T	14.25	156
MECHANICALLY SEPARATED 2/	17.00		17.00	104
THIGH MEAT - FROZEN	49.50-58.00		52.69	320

WEDNESDAY, SEPTEMBER 04, 2002

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	19.00		19.00	52
WINGS FULL-CUT - TOMS	18.00		18.00	52
WINGS, V-TYPE, TOM	26.00		26.00	104
TAILS		T	14.25	156
MECHANICALLY SEPARATED 2/		T	17.61	98
THIGH MEAT - FROZEN		T	48.63	158

TUESDAY, SEPTEMBER 03, 2002

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	18.00		18.00	208
WINGS FULL-CUT - TOMS	17.50-18.00		17.75	208
WINGS, V-TYPE, TOM		F	28.50	104
TAILS	14.25		14.25	156
MECHANICALLY SEPARATED 2/	17.25-19.00		17.61	98
THIGH MEAT - FROZEN	48.25-49.00		48.63	158

*****NOTICE*****

MONDAY, SEPTEMBER 02, 2002

NO EXPORT TRADING REPORTED DUE TO LABOR DAY HOLIDAY

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.