



# INTERNATIONAL EGG AND POULTRY REVIEW

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U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

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## Bosnia Herzegovina

Bosnia and Herzegovina's (BiH) population of 3.75 million consumes about 12kg of chicken meat and 150 eggs per capita per year. Thus total consumption for poultry meat is estimated at 45,000 MT and 562 million for eggs. Poultry consumption dropped during the 1992-1995 war but has risen every year since 1996. It is estimated that today's consumption is again at prewar levels.

Domestic production meets approximately two-thirds of the demand for chicken meat and shell eggs. Production of broilers is approximately 15-20 million birds. The stock of layers is about 1.8 million birds with total production of around 400 million eggs.

Chicken is the most popular form of poultry. Turkey is rarely produced in BiH and consumers are generally not familiar with it in processed products.

Domestic production is expected to grow further because local demand is high and there is some excess production capacity. Given that purchasing power in BiH is quite low by European standards, poultry meat and products are a good source of protein relative to other meats. In addition, recent outbreaks of cattle, sheep and pig diseases in the country have left consumers wary of other meat products. Genetics and management are getting better for local producers and the major obstacle to industry expansion now seems to be the poor quality of slaughter facilities and a lack of refrigerated storage in some parts of the country. There is a shortage of de-boned chicken meat for the processing. Importers regularly protest against the 10% tariff paid for whole poultry versus the 2 KM (\$1.01) per kilo tariff on de-boned meat.

Holland is the largest exporter to BiH followed by Slovenia and Croatia. Officially, BiH imported around 15,000 MT of poultry meat in 2001, but there has historically been a significant amount of smuggling from Hungary.

### Imports of Poultry Meat

Country	Value (\$)	Market Share (%)
Netherlands	2,984,962	20.6
Slovenia	2,743,584	19
Croatia	2,468,815	17
Belgium	1,562,250	10.8
Germany	1,230,440	8.5
Italy	791,085	5.5
China	760,599	5.3
Austria	616,182	4.3
Hungary	574,051	4

Under the 1995 Dayton Peace Agreement, Bosnia and Herzegovina (BiH) is divided into two Entities: the Federation of Bosnia and Herzegovina (F BiH) and Republika Srpska (RS). There is also the Brcko District with a special administrative status.

Source: USDA/FAS

## Mexico Investigates Bilateral Safeguards on Chicken Leg Quarters

The Secretariat Economy (SE) published on November 22, 2002, in the Diario Oficial (Federal Register), the Resolution accepting the request of the Mexican Poultry Association, and beginning the investigation of bilateral safeguard measures on imported U.S. chicken leg quarters. According to the Resolution, the time frame for the investigation will be from 1997 to 2001, along with projections for 2002 and 2003.

There is a 30 day working period (beginning on November 21, 2002) so that interested parties (importers, exporters, etc.) can present to SE an official feedback form of investigation, provided at the SE offices. This announcement indicates that a provisional imposition of a safeguard is still being analyzed. This resolution went into effect on November 22, 2002.

The Mexican Poultry Producers Association (UNA) presented the safeguard request to SE on September 10, 2002, and based on NAFTA article 801, requested that a bilateral safeguard of 98.8 percent be applied to tariff rates applicable to imports of chicken leg quarters from the United States. This safeguard would be in place until December 31, 2007. UNA indicated that such a level of protection is required to enable the poultry industry to further develop and better compete with imports of U.S. chicken.

The SE indicates that as a result of the analysis done along with this resolution, there is enough evidence to presume that the lifting of current poultry tariffs, without the imposition of safeguards, will result in a significant increase in poultry imports that could cause serious damage to domestic production levels. Consequently, SE considers it necessary to initiate an investigation to evaluate the imposition of bilateral safeguard measures for imported chicken leg quarters.

Disclaimer: This summary is based on a cursory review of the subject announcement and therefore should not, under any circumstances, be viewed as a definitive reading of the regulation in question, or of its implications for U.S. agricultural export trade interests.

Source: USDA/FAS

## Mexico Establishes Listeria Testing Requirement

The Government of Mexico recently established a listeria testing procedure for "hamburgers, nuggets, cold cuts, or any other prepared chicken and turkey product ready for human consumption." The testing procedure will take 4-12 working days, however, shipments will be permitted to enter prior to the receipt of final test results. Exporters should plan on this procedure being in place indefinitely.

Source: USDA/FAS

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

**U.S. Exports to Canada, in Pounds (000) (Preliminary)**  
 Week Ending December 07, 2002      Year-To-Date

	2002	2001/1	2002	2001
Liquid	510	227	19,690	12,635
Frozen	0	0	21	78
Dried	40	64	800	426
Total	550	291	20,511	13,139

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**  
 Week Ending December 07, 2002      Year-To-Date

	2002	2001/1	2002	2001
Liquid	34	137	5,918	5,664
Frozen	137	108	3,254	1,663
Dried	80	4	4,969	618
Total	251	249	14,141	7,945

**Inspected Shell Eggs**

**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**  
 Week Ending December 07, 2002      Year-To-Date

	2002	2001 /1	2002	2001
Jumbo	33	0	1,605	87
Extra Large	2,405	2,076	50,754	68,478
Large	6,503	2,719	139,424	134,933
Medium	856	646	47,747	43,897
Ungraded	18,860	12,510	356,845	433,120
Misc	0	0	14,737	70,364
Total	28,657	17,951	611,112	750,879

/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.

13-DEC-2002

<b>CHICKEN</b>	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	81,600	-
WTD AVERAGE		13.00		
15-20%				
RANGE	11.00-13.00	10.00-14.00	1,270,000	856,800
WTD AVERAGE	12.00	10.72		
20% OR MORE				
RANGE	-	10.00-11.00	80,000	-
WTD AVERAGE		10.50		

\* 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 7-Dec-02

(PRELIMINARY)      U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,739	1,425	3,164
LAST WEEK	1,223	1,010	2,233
SAME WEEK YR AGO	1,901	1,684	3,585
TO-DATE/2002	84,862	69,353	154,215
TO-DATE/2001	87,091	67,838	154,929

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	300	0	300
LAST WEEK	235	7	242
SAME WEEK YR AGO	392	11	403
TO-DATE/2002	14,672	297	14,969
TO-DATE/2001	20,032	301	20,333

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

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

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	2,039	1,425	3,464
LAST WEEK	1,458	1,017	2,475
SAME WEEK YR AGO	2,293	1,695	3,988
TO-DATE/2002	99,534	69,650	169,184
TO-DATE/2001	107,123	68,139	175,262

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.

13-DEC-2002

<b>CHICKEN</b>	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	14.50-16.00	13.50	1,009,000	668,000
WTD AVERAGE	15.17	13.50		
15-20%				
RANGE	-	10.00-14.50	1,570,000	-
WTD AVERAGE		12.30		
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 13 DECEMBER 2002.**

The tom bulk parts undertone on full-cut wings was steady to barely steady, 2-joint wings steady to weak (both domestic and export), and drums steady to instances weak, tails steady. The undertone was at least steady on hen wings, drums mostly steady, and necks barely steady. Domestic bulk parts demand was light to instances fair with some increased activity noted on tom drums and tom 2-joint wings at lower trending price levels. Export demand on tom drums and tom 2-joint wings continued active, balance of parts slow to instances moderate. Tom bulk parts ranged from at least adequate on full-cut wings to burdensome on necks. Some tom 2-joint wing inventories are becoming better balanced, others remain burdensome. Hen bulk parts offerings ranged from light on wings to fully adequate on necks. Trading centered on a moderate volume of tom 2-joint wings and a fair volume of tom drums for export, balance light. For domestic: fresh breast trim 83- 85, plant grade non-basted basted 12-16 lb. breasts 98, plant grade basted 18-20 lb. breasts 115, hearts 26, fresh wing meat 50-51, breast patterned skin 50 cents delivered. For export: frozen MST -90 days age 13, frozen thigh trim with bone fragments 31 cents delivered.

**FRIDAY, DECEMBER 13, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	19.00-20.00		19.36	440	19.57	1,012
WINGS FULL-CUT - TOMS		F	19.00	52		
WINGS, V-TYPE, TOM	17.00		17.00	520	17.33	1,248
TAILS		W	18.00	80	18.33	120
MECHANICALLY SEPARATED 2/	15.00		15.00	80	15.57	572
THIGH MEAT - FROZEN	54.00		54.00	20	56.16	456

**THURSDAY, DECEMBER 12, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	18.50-21.00		19.64	440
WINGS FULL-CUT - TOMS		F	19.00	52
WINGS, V-TYPE, TOM		W	17.57	728
TAILS		W	18.00	80
MECHANICALLY SEPARATED 2/		W	15.68	212
THIGH MEAT - FROZEN	53.00-59.50		57.37	316

**WEDNESDAY, DECEMBER 11, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	20.00		20.00	80
WINGS FULL-CUT - TOMS		F	19.00	52
WINGS, V-TYPE, TOM	17.00-19.00		17.57	728
TAILS	18.00		18.00	80
MECHANICALLY SEPARATED 2/	15.00-17.00		15.68	212
THIGH MEAT - FROZEN		T	53.33	120

**TUESDAY, DECEMBER 10, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	20.00	52
WINGS FULL-CUT - TOMS		F	19.00	52
WINGS, V-TYPE, TOM		F	19.60	200
TAILS		M	19.00	40
MECHANICALLY SEPARATED 2/	15.50-16.00		15.64	280
THIGH MEAT - FROZEN	53.00-54.00		53.33	120

**MONDAY, DECEMBER 09, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	20.00		20.00	52
WINGS FULL-CUT - TOMS		F	19.00	52
WINGS, V-TYPE, TOM		F	19.60	200
TAILS	19.00		19.00	40
MECHANICALLY SEPARATED 2/		R	16.00	208
THIGH MEAT - FROZEN		F	53.00	240

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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