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Brazil Chicken Exports

According to Brazil's Ministry of Agriculture, chicken exports for June 2003 were up 65 percent on value (US\$140.8 million) and 86 percent on volume (158,183 metric tons) when compared to a June 2002. The price per ton was down .56 percent. For the 12 month period of July 2002 to June 2003 exports were valued at \$1,590,690,000, an increase of 25 percent and totaled 1,932,724 metric tons, up 50 percent from the same period a year ago.

Russia's quota on poultry imports went into effect on April 29 this year. The quota for April 29 – December 31, 2003 is 744,000 metric tons. For calendar year 2004 the quota is 1,050,000 metric tons. The U.S. received 74 percent of the quota shares, the EU received 19 percent and Brazil received 4 percent.

Brazil: 2003 Chicken Exports, in metric tons

	Jan	Feb	Mar	Apr	May	Jun
Whole	146,510	173,413	164,010	144,287	129,035	155,437
Cuts	1,721	2,566	2,383	4,211	2,964	2,746
Total	148,231	175,979	166,393	148,498	131,999	158,183

Brazil's chicken exports were strong in February and March while Russian bans on U.S. poultry were in effect. Brazil's chicken exports fell in May, after the Russian quota's took effect.

Broiler Meat Market Comparisons

Production in million metric tons

	1999	2000	2001	2002	2003f	2004e
World	43,412	45,800	47,618	49,169	49,095	50,500
Brazil	5,139	5,732	6,736	7,449	8,045	8,450
U.S.	13,367	13,703	14,033	14,467	14,505	N/A
Brazil Share	12%	13%	14%	15%	16%	17%
U.S. Share	31%	30%	29%	29%	30%	N/A

Export in million metric tons

	1999	2000	2001	2002	2003f	2004e
World	4,462	4,868	5,606	5,334	5,556	5,800
Brazil	771	916	1,249	1,600	1,760	1,850
U.S.	2,080	2,231	2,521	2,177	2,325	N/A
Brazil Share	17%	19%	22%	30%	31%	32%
U.S. Share	47%	46%	45%	41%	42%	N/A

Source: Brazil's Ministry of Agriculture, U.S. Department of Commerce, USDA/Economic Research Service Livestock, Dairy & Poultry Outlook

Poland

U.S. poultry meat exports to Poland will terminate late 2003 or early 2004 when Polish Veterinary Authorities implement EU import requirements. The exact date of implementation of the EU rules is not known. According to preliminary statements of Polish Veterinary Authorities, transshipment of U.S. poultry meat through Poland will be allowed after Poland's EU accession in May 2004. Regulations regarding post EU accession transshipments have not been established yet. Meanwhile, it is expected that Poland's chicken broiler production will increase six percent in 2003 and another four percent in 2004. Turkey meat production is expected to slightly increase or stabilize in 2003.

Poultry meat consumption doubled over the last 10 years. According to estimates of the Institute of Rural Economics, in 2003 the average per capita consumption of poultry meat will be 21.0 kilograms compared to 19.8 kg in 2002. Consumption of chicken and turkey meat continue to grow as Poles become more health conscious and substitute poultry for other meats. The growing number of fast food restaurants also has stimulated demand for poultry meat.

Poland: Poultry Imports in metric tons

Time period Jan - Dec

Broilers	2001	2002
U.S.	2,842	487
The Netherlands	4,799	9,831
Denmark	657	1,004
Belgium	375	467
Germany	340	262
Ireland	306	139
Italy	280	119
Great Britain	225	85
France	119	71
Hungary	58	60
Canada	44	42
Total for Others	7,203	12,080
Others not Listed	195	126
Grand Total	10,240	12,693
Turkey		
U.S.	4,691	1,889
Great Britain	2,889	5,043
Italy	1,626	3,987
France	1,441	2,648
Canada	1,397	1,364
Denmark	508	484
The Netherlands	183	305
Germany	147	300
Hungary	96	194
Spain	36	158
Ireland	20	154
Total for Others	8,343	14,637
Others not Listed	7	294
Grand Total	13,041	16,820

Source: USDA/Foreign Agricultural Service

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

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

Week Ending July 26, 2003	Year-To-Date			
	2003	2002/1	2003	2002
Liquid	256	199	9,442	10,869
Frozen	0	0	96	21
Dried	0	41	326	369
Total	256	240	9,864	11,259

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

Week Ending July 26, 2003	Year-To-Date			
	2003	2002/1	2003	2002
Liquid	127	193	3,435	3,875
Frozen	0	93	1,760	2,104
Dried	4	121	862	3,207
Total	131	407	6,057	9,186

Inspected Shell Eggs

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

Week Ending July 26, 2003	Year-To-Date			
	2003	2002 /1	2003	2002
Jumbo	17	0	273	1,161
Extra Large	180	920	13,737	16,054
Large	2,340	3,211	58,943	77,104
Medium	0	1,315	38,069	30,721
Ungraded	2,880	5,520	48,506	177,755
Misc	0	0	3,852	12,282
Total	5,417	10,966	163,380	315,077

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 26-Jul-03
(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,105	1,459	2,564
LAST WEEK	1,141	1,642	2,783
SAME WEEK YR AGO	1,829	1,536	3,365
TO-DATE/2003	47,286	41,107	88,393
TO-DATE/2002	53,128	40,500	93,628

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	276	0	276
LAST WEEK	366	8	334
SAME WEEK YR AGO	302	33	335
TO-DATE/2003	7,710	108	7,818
TO-DATE/2002	9,482	181	9,663

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	1,381	1,459	2,840
LAST WEEK	1,507	1,650	3,117
SAME WEEK YR AGO	2,131	1,569	3,700
TO-DATE/2003	54,996	41,215	96,211
TO-DATE/2002	62,610	40,681	103,291

SOURCE: USDA/AMS PLTRY PROGRAMS, MARKET 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.

01-AUG-2003

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	19.00	13.00-16.00	121,600	-
WTD AVERAGE	19.00	14.50		
15-20%				
RANGE	12.00-17.00	10.50-16.50	2,914,400	1,406,400
WTD AVERAGE	12.21	13.21		
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.

01-AUG-2003

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	15.25-18.50	17.00	512,000	472,000
WTD AVERAGE	16.90	17.00		
15-20%				
RANGE	12.00-16.50	10.00-16.00	1,704,000	504,000
WTD AVERAGE	15.88	12.79		
20% OR MORE				
RANGE	-	11.00	40,000	-
WTD AVERAGE		11.00		

* 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 1 AUGUST 2003.

Seller sentiment was steady to fully steady on fresh tom breast meat and fresh wing meat, balance mostly steady. Demand on fresh tom breast meat was in a full range, mostly fair with some buyers not needing full contract needs while others take additional product. Demand on the balance of fresh white meat was slow to moderate. Offerings of fresh white meat ranged from light to adequate with wing meat held with the most confidence. The trade sentiment on tom drums and full-cut wings was steady to fully steady, however some export buyer resistance was starting to be noted at the higher seller offering prices. Domestic trading light. Mechanically separated turkey trading consisted mostly of part loads. Fresh wing meat 40-42, fresh scapula 52, fresh breast trim 62 cents delivered domestic. Export trading was also light. For export: hen necks 14, fresh tom drums 26 cents delivered.

FRIDAY, AUGUST 01, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	25.00-26.00		25.20	196	25.65	1,168
WINGS FULL-CUT - TOMS		W	20.00	108	20.00	108
WINGS, V-TYPE, TOM		T	23.00	156	22.64	243
TAILS	19.50		19.50	40	20.25	80
MECHANICALLY SEPARATED 2/	15.00-16.00		15.66	76	15.79	368
THIGH MEAT - FROZEN	49.50-51.00		50.82	222	55.69	1,022

THURSDAY, JULY 31, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	25.90	392
WINGS FULL-CUT - TOMS		W	20.00	108
WINGS, V-TYPE, TOM		T	23.00	156
TAILS	21.00		21.00	40
MECHANICALLY SEPARATED 2/	15.00		15.00	52
THIGH MEAT - FROZEN	67.00		67.00	52

WEDNESDAY, JULY 30, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	25.50-26.00		25.90	392
WINGS FULL-CUT - TOMS	20.00		20.00	108
WINGS, V-TYPE, TOM		T	23.00	156
TAILS		R	15.83	380
MECHANICALLY SEPARATED 2/	16.00		16.00	200
THIGH MEAT - FROZEN	50.00-68.00		56.07	328

TUESDAY, JULY 29, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	25.00-26.00		25.63	580
WINGS FULL-CUT - TOMS		F	19.00	104
WINGS, V-TYPE, TOM	23.00		23.00	156
TAILS		R	15.83	380
MECHANICALLY SEPARATED 2/	16.00		16.00	40
THIGH MEAT - FROZEN	51.00		51.00	104

MONDAY, JULY 28, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		F	26.00	160
WINGS FULL-CUT - TOMS		F	19.00	104
WINGS, V-TYPE, TOM	22.00		22.00	87
TAILS		R	15.83	380
MECHANICALLY SEPARATED 2/		F	17.00	120
THIGH MEAT - FROZEN	50.00-67.00		58.39	316

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.