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Effects of Japan's Suspension of Poultry Products from China

Japan's agriculture ministry (MAFF) suspended imports of poultry and poultry products from China effective May 12, 2003, after the Japanese Animal Quarantine Office isolated and identified highly pathogenic avian influenza from duck meat imported from China. After MAFF confirmed that over 90 days had passed since the last outbreak of avian influenza and appropriate sanitary measures had been taken, MAFF decided to lift the import suspension of chicken meat and products derived from chickens that were slaughtered on and after August 17, 2003. During the ban, China continued to supply prepared broiler products produced at plants that were approved by MAFF.

Japan: Imports, Frozen Broilers in metric tons

	U.S.	China	Brazil	Thailand	Total
2002					
January	3,179	11,207	21,107	22,347	57,840
February	5,264	5,890	15,369	18,500	45,023
March	2,181	5,930	15,647	16,595	40,353
April	3,457	8,192	17,865	16,430	45,944
May	2,654	10,131	17,700	14,511	44,996
June	2,928	11,076	7,704	14,189	35,897
July	5,606	12,561	4,686	14,457	37,310
August	5,152	9,628	15,298	12,313	42,391
September	3,006	9,661	8,350	13,277	33,479
Year to Date	33,427	83,461	123,726	142,616	383,233
2003					
January	4,555	9,529	18,014	14,602	46,700
February	2,959	7,566	9,444	12,969	32,938
March	3,036	9,633	9,754	13,539	35,962
April	3,341	12,355	7,556	13,397	36,649
May	3,124	6,770	13,443	12,338	35,675
June	2,264	52	14,128	14,191	30,635
July	8,955	175	16,732	16,774	42,636
August	5,093	144	20,354	15,680	41,271
September	4,928	353	19,817	17,809	42,907
Year to Date	38,255	46,577	129,242	131,299	345,373

Source: ALIC Monthly statistics, MAFF, and USDA/FAS

Avian Influenza in South Korea

A suspected case of Highly Pathogenic Avian Influenza (HPAI) has been detected in South Korea. Between December 5 and December 11 the virus killed nearly 19,000 of 24,000 chickens at a broiler breeder farm, located about 50 miles southeast of Seoul. The remaining 5,000 birds were destroyed as a precautionary measure, and a quarantine was placed on 76 poultry farms within a 6.2-mile radius of the farm. On December 16, the Agriculture Ministry disclosed it was investigating a neighboring farm's 3,300 ducks.

South Korea's poultry industry has 100 million chickens, mostly for local consumption. This year chicken exports totaled 300,000 chickens worth \$591,200 and 3,000 tons of chicken meat worth \$7,263,514. Korea's main export market is Japan. The government and the Korean Chicken Council have aggressively promoted exports of chilled chicken parts and some cooked chicken soup to Japan. Its main competitors are China and Thailand.

Recent outbreaks of Avian Influenza have been in the southeastern most part of China and in Hong Kong. Earlier this year there was an outbreak in the Netherlands, which spread to Germany and Belgium. HPAI has never been detected in South Korea and Japan has not had an outbreak since 1925. Korea has had sporadic cases of low pathogenic avian influenza since 1996.

Source: OIE, news wires

Russia

The Russian Government recently approved a resolution requiring country of origin certificates for a wide range of products, including agricultural goods. The measure is designed to prevent transshipment of third country products intentionally mislabeled to gain tariff preferences. The decree becomes effective January 1, 2004.

The Russian Statistics Committee reported domestic chicken leg quarter prices increased nearly 6.8 percent in November, while imported chicken leg quarter prices were flat. The price premium for domestic chicken leg quarters returned to the long-term trend of about 30 percent above imported leg quarter prices. Prices on domestic poultry frozen carcasses and boneless breasts decreased in November.

Source: USDA/FAS and other sources

Table 1. Moscow Wholesale Poultry Meat Prices, January – November 2003

Date	Rate, ruble/\$	Domestic chicken			Imported chicken		
		Frozen carcasses	Frozen breast, boneless	Frozen leg quarters	Frozen carcasses	Frozen breast, boneless	Frozen leg Quarters
01/30/2003	31.80	42.81	58.28	47.05	38.55	55.47	34.69
02/28/2003	31.58	42.32	56.28	41.16	40.81	54.89	35.04
03/30/2003	31.38	41.68	55.17	42.27	42.15	54.15	34.92
04/30/2003	31.10	41.77	55.67	44.50	41.90	56.38	34.42
05/30/2003	30.67	43.93	57.62	45.00	43.76	62.17	39.55
06/30/2003	30.35	49.07	59.32	49.50	48.27	73.08	39.77
07/30/2003	30.25	53.55	78.00	50.83	55.78	81.69	41.76
08/30/2003	30.50	59.04	99.67	59.62	59.09	101.00	44.81
09/30/2003	30.61	59.96	108.00	61.09	58.58	107.77	45.45
10/30/2003	29.82	58.77	105.50	57.23	58.21	103.48	47.08
11/30/2003	29.74	57.96	101.00	61.13	56.42	95.08	47.11

Prices are in rubles per kilogram

Source: Russian Institute for Agricultural Market Studies (KAR)

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

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

	Week Ending December 6, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	354	510	16,525	19,788
Frozen	0	0	96	21
Dried	0	40	559	803
Total	354	550	17,180	20,612

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

	Week Ending December 6, 2003		Year-To-Date	
	2003	2002/1	2003	2002
Liquid	2	34	5,356	5,918
Frozen	7	137	3,604	3,295
Dried	32	80	1,252	5,043
Total	41	251	10,212	14,256

Inspected Shell Eggs

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

	Week Ending December 6, 2003		Year-To-Date	
	2003	2002 /1	2003	2002
Jumbo	66	33	570	1,606
Extra Large	2,370	2,405	37,038	50,097
Large	6,390	6,503	135,062	146,790
Medium	1,849	856	65,671	48,953
Ungraded	3,330	18,890	180,852	356,815
Misc	0	0	14,642	14,017
Total	14,005	28,687	433,835	618,278

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	12-DEC-2003			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	12-DEC-2003			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	20.00	13.00-15.00	142,000	-
WTD AVERAGE	20.00	14.20		
15-20%				
RANGE	15.25-18.00	10.50-14.00	2,292,400	1,096,800
WTD AVERAGE	15.91	11.53		
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 6-Dec-03 (PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,399	1,437	2,836
LAST WEEK	668	897	1,565
SAME WEEK YR AGO	1,739	1,425	3,164
TO-DATE/2003	69,258	68,510	137,768
TO-DATE/2002	84,862	69,353	154,215
	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	250	4	254
LAST WEEK	0	0	-
SAME WEEK YR AGO	300	0	300
TO-DATE/2003	10,450	145	10,595
TO-DATE/2002	14,791	290	15,081

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	1,649	1,441	3,090
LAST WEEK	668	897	1,565
SAME WEEK YR AGO	2,039	1,425	3,464
TO-DATE/2003	79,708	68,655	148,363
TO-DATE/2002	99,653	69,643	169,296

SOURCE: USDA/AMS PLTRY PROGRAMS, MARKET 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.

CHICKEN	12-DEC-2003			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	12-DEC-2003			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	15.50-16.50	16.00	416,000	320,000
WTD AVERAGE	15.61	16.00		
15-20%				
RANGE	16.00-19.00	11.00-14.50	1,404,000	468,000
WTD AVERAGE	18.33	11.88		
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 12 DECEMBER 2003.

The trade sentiment on tom bulk parts was steady to barely steady on full-cut and 2-joint wings, drums mostly steady and necks steady to instances firm. Demand on tom bulk parts was slow to instances moderate. Offerings of tom full-cut wings were mixed ranging from light to instances ample, drums short to sometimes adequate, and necks short of buyers' needs. The undertone hen parts ranged from steady on drums to fully steady on the balance of items. Demand light to fair. Offerings of hen drums light to instances adequate with some noting supplies not as tight as previous weeks, balance light at best. The thigh meat undertone was steady to weak. Demand slow for the adequate to instances burdensome offerings. Trading light on all items. Fresh wing meat traded at 66-74 and fresh scapula at 72-83 cents delivered domestic. Frozen 15-20% mechanically separated turkey traded at 18 cents delivered export for January, 2004 shipments.

FRIDAY, DECEMBER 12, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	42.00-43.00		42.20	200	42.09	704
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/		R	16.67	120	17.53	344
THIGH MEAT - FROZEN	79.00		79.00	52	84.24	572

THURSDAY, DECEMBER 11, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	40.00-42.00		40.50	160
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/	14.00-18.00		16.67	120
THIGH MEAT - FROZEN	88.00		88.00	80

WEDNESDAY, DECEMBER 10, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	42.76	344
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/		T	18.00	120
THIGH MEAT - FROZEN		T	91.33	120

TUESDAY, DECEMBER 09, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	41.00-44.00		42.76	344
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/	18.00		18.00	120
THIGH MEAT - FROZEN	91.00-92.00		91.33	120

MONDAY, DECEMBER 08, 2003**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		F	41.67	360
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/	18.00		18.00	104
THIGH MEAT - FROZEN	80.00-83.00		81.50	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.