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World Meat Markets

Approximately one-third of global meat exports, or 6 million tons, are presently being affected by animal disease outbreaks. This includes meat product exports from nearly 12-13 countries which have been banned or constrained in 2004 as a result of animal disease concerns.

Canada, the U.S., China, Thailand and 8 other Asia countries have reported outbreaks of different strains of avian influenza. These countries account for almost 50 percent of world exports of poultry meat (about 4 million tons).

In the United States and Canada, the identification of BSE-infected cows led to markets around the world banning product. The US and Canada account for more than one-quarter of global beef export supplies (or 1.6 million tons).

Non-traditional exporters are moving to supply Japanese import poultry demand. Both Malaysia and the Philippines have moved to finalize agreements to export poultry to Japan. Malaysia will export 200 to 240 tons of boneless chicken) while the Philippines are hoping to ship 30,000 tons.

The Japanese are reaching a tentative agreement with Thailand to resume imports of processed/heat treated poultry. Out of the \$450 million of Thai poultry exported to Japan last year, approximately one quarter is in processed form. The EU is already taking processed product from Thailand.

Brazilian exporters indicate that stronger demand for Brazilian poultry products in the wake of AI outbreaks would increase 2004 output by 5-6 percent while pushing poultry exports up by 15 percent.

Chinese exports are forecast to decline 20 percent in 2004 in response to AI outbreaks; meanwhile imports are expected to decline even more, down 25 percent due to a slowdown in consumption and poultry product import bans on AI-affected suppliers, including the U.S. As of February 19, China had culled 7,961,400 birds and 10,211,800 had received compulsory vaccinations.

As of February 23, 2004, 29 countries had trade bans on U.S. poultry exports in place or pending. The scope of the bans varies widely by country. Some countries allow product subjected to heat treatment, while some countries even ban poultry bone meal and feather meal. Some restrictions are limited to select states while other countries have a blanket ban on the U.S.

For more information on avian influenza in the United States visit Hot Issues at www.aphis.usda.gov or the Library of Export Requirements at www.fsis.usda.gov to view the most current status.

U.S. Egg and Egg Products and Live Birds: Exports for 2003

	Volume 2003	Value 2003
Table Eggs	40,844,060 dozen	\$26,552,000
Hatching Eggs	46,440 dozen	\$94,395,000
Egg Products	33,692 metric tons	\$89,596,000
Breeder Broiler Chicks	35,655,894	\$74,492,000
Breeder Layer Chicks	4,941,096	\$13,979,000
Chicks-not for breeding	3,935,461	\$2,487,000
Live Turkeys <185 grams	7,652,030	\$8,456,000

World and Selected Countries Bovine Meat: Export

	2001	2002	2003	2001	2002	2003
	(000 mt - CWE)			Percent		
*World	5,507.3	5,875.7	5,991.3	100.0	100.0	100.0
Australia	1,265.5	1,236.0	1,135.0	23.0	21.0	18.9
United States	1,010.6	1,071.9	1,150.0	18.4	18.2	19.2
*EU (15)	547.0	500.0	450.0	9.9	8.5	7.5
Canada	542.3	579.5	430.0	9.8	9.9	7.2
New Zealand	449.1	430.0	475.0	8.2	7.3	7.9
Brazil	645.0	755.0	980.0	11.7	12.8	16.4
BSE-affected	1,553.0	1,651.4	1,580.0	28.2	28.1	26.4

World and Selected Countries Poultry Meat: Export

	2001	2002	2003	2001	2002	2003
	(000 mt - CWE)			Percent		
*World	7,798.7	7,869.9	7,870.6	100.0	100.0	100.0
United States	3,171.4	2,686.9	2,731.0	40.7	34.1	34.7
*EU (15)	961.0	1,090.0	920.0	12.3	13.9	11.7
Brazil	1,343.6	1,720.0	1,865.0	17.2	21.9	23.7
AI-Infected	4,361.0	3,966.4	4,016.0	55.9	50.4	51.0

World and Selected Countries Pig Meat: Export

	2001	2002	2003	2001	2002	2003
	(000 mt - CWE)			Percent		
*World	3,456.3	4,060.5	4,078.8	100.0	100.0	100.0
*EU (15)	1,090.0	1,240.0	1,060.0	31.5	30.5	26.0
Canada	659.1	772.5	880.0	19.1	19.0	21.6
United States	628.9	652.6	660.0	18.2	16.1	16.2
Brazil	297.2	520.0	530.0	8.6	12.8	13.0

World and Selected Countries Total Meat: Export

	2001	2002	2003	2001	2002	2003
	(000 mt - CWE)			Percent		
World	17,761.3	18,772.7	18,929.5	100	100	100
United States	4,855.3	4,457.8	4,587.0	27.3	23.7	24.2
EU (15)	2,618.8	2,850.1	2,449.0	14.7	15.2	12.9
Brazil	2,304.6	3,014.1	3,394.1	13.0	16.1	17.9
Canada	1,314.9	1,482.8	1,426.4	7.4	7.9	7.5
Meat Disease-affected exports	5,914.0	5,617.8	5,596.0	33.3	29.9	29.6

*EU (15) excluding intra-trade

Source: USDA/APHIS and FAS, FAO, OIE

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

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

	Week Ending February 14, 2004		Year-To-Date	
	2003	2002/1	2003	2002
LIQUID	147	0	732	1,464
FROZEN	0	0	0	0
DRIED	40	0	49	84
TOTAL	187	0	781	1,548

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

	Week Ending February 14, 2004		Year-To-Date	
	2003	2002/1	2003	2002
LIQUID	73	193	684	1,037
FROZEN	48	42	105	369
DRIED	40	0	475	40
TOTAL	161	235	1,264	1,446

Inspected Shell Eggs

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

	Week Ending February 14, 2004		Year-To-Date	
	2003	2002/1	2003	2002
JUMBO	0	0	50	0
EXTRA LARGE	780	0	780	150
LARGE	750	1,680	4,443	2,785
MEDIUM	1,500	799	2,280	2,679
UNGRADED	7,200	0	7,950	1,470
MISC	0	0	0	0
TOTAL	10,230	2,479	15,503	7,084

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 14-Feb-04
(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,230	1,319	2,549
LAST WEEK	1,117	1,273	2,390
SAME WEEK YR AGO	1,793	1,257	3,050
TO-DATE/2004	7,834	7,665	15,499
TO-DATE/2003	10,384	8,287	18,671

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	153	8	161
LAST WEEK	220	0	220
SAME WEEK YR AGO	541	0	541
TO-DATE/2004	1,592	26	1,618
TO-DATE/2003	2,346	43	2,389

Source: Agriculture Canada, Poultry Development Division

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

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,383	1,327	2,710
LAST WEEK	1,337	1,273	2,610
SAME WEEK YR AGO	2,334	1,257	3,591
TO-DATE/2004	9,426	7,691	17,117
TO-DATE/2003	12,730	8,330	21,060

Source: USDA/AMS Poultry Programs, Market News Branch

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	Feb 20, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	Feb 20, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	13.00-15.00	140,200	-
WTD AVERAGE		13.40		
15-20%				
RANGE	12.50-15.00	11.00-14.00	2,120,800	846,400
WTD AVERAGE	13.85	12.04		
20% OR MORE				
RANGE	-	12.50-13.00	81,600	-
WTD AVERAGE		12.75		

* 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.

CHICKEN	Feb 20, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	Feb 20, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	13.50-17.50	15.00	1,106,000	678,000
WTD AVERAGE	15.29	15.00		
15-20%				
RANGE	15.50-20.00	12.50-19.00	2,200,000	1,248,000
WTD AVERAGE	17.18	14.33		
20% OR MORE				
RANGE	-	12.00	160,000	-
WTD AVERAGE		12.00		

* 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 20 FEBRUARY 2004.

The fresh white meat market continued fully steady to firm for prompt shipments, frozen steady to firm. Demand was fair to good on fresh for immediate deliveries, frozen slow to moderate. Offerings were short to instances light and held with confidence. The tom bulks undertone was mostly steady on 2-joint wings, steady to fully steady on drums, firm on full-cut wings and necks. Domestic demand was fair to good while export interest was mixed with some buyers resisting current price levels. Industry members continue to watch Asia's closed market to U.S. poultry production. Demand light to fair on 4-8 lb. breasts for the mostly adequate offerings. Domestic trading centered on a moderately heavy volume of 4-8 lb. breasts, balance light to fair. Export trading slow. For domestic: fresh tom necks 51, fresh wing meat with skin 82-88, fresh scapula 85-87, fresh breast trim 93 cents delivered.

FRIDAY, FEBRUARY 20, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	56.00-57.00		56.67	120	56.25	160
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	87.00		87.00	80	87.00	80

THURSDAY, FEBRUARY 19, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	55.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	83.67	120

WEDNESDAY, FEBRUARY 18, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	55.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	83.67	120

TUESDAY, FEBRUARY 17, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	55.00		55.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	83.67	120

MONDAY, FEBRUARY 16, 2004

NO EXPORT TRADING REPORTED DUE TO PRESIDENTS 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.

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