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EU Expansion

On May 1 Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, the Slovak Republic, and Slovenia are to join the European Union. The EU will have 25 member countries creating the world's third largest territorial unit.

The EU-25 will have 450 million inhabitants, compared to 300 million in the U.S. The EU-15 already accounts for 20 percent of world trade and accounts for more than 25 percent of the world's Gross Domestic Product.

EU 25 compared to EU 15: almost 20% increase in population

	Total Population in millions	Structure of the population by age in 2002 (percent)		
		by age in 2002 (percent)		
		Jan 1, 2004	< 15 yrs	15-64 yrs
EU25	454.9	16.8*	67.2*	16.0*
EU15	380.8	16.6*	66.8*	16.6*
US	291.4	21.4	66.2	12.4

Eurostat first estimate

*Estimated

The new member countries have a level of income about half of that of the EU-15, but income growth rates are about 2-3 times that of the EU-15. The Gross Domestic Product (GDP) of the new countries are significantly lower than in the EU-15. As a percent of the EU average, the differences ranged from a low of 28 percent in Lithuania up to 83 percent in Cyprus in 2001. Data was not available for Malta. Agricultural share of employment was highest in Poland (19.2), Lithuania (16.5) and Latvia (15.1) and lowest in Malta (2.3), Cyprus (4.8) and the Czech Republic (4.6).

Hungary, Poland, Estonia, the Czech Republic, Slovenia and Cyprus began accession negotiations on March 31, 1998. Negotiations began on October 13, 1999 for Romania, the Slovak Republic, Latvia, Lithuania, Bulgaria and Malta. On May 1, 2004, the 10 new member countries will have to implement 80,000 pages of regulations known as the "acquis communautaire." Romania and Bulgaria are expected to accede in 2007.

Several countries have processing plants, dairies and slaughterhouses that don't meet EU hygiene standards. In mid-April the EU granted transition periods to some 1,000 establishments, which will be allowed to continue selling food in their home member state. Products deemed below EU norms will be stamped with a special mark to ensure they are not sold outside the domestic market.

As of May 1, 2004, B class eggs (eggs over 20 days old, up to six months) will not be permitted to be sold in supermarkets. They must be sold to the food industry to be pasteurized. All class A eggs (fresh eggs) sold in supermarkets will need to have a certification stamp on their shell for traceability under the EU directives of food safety.

U.S. poultry exports to the new member countries will fall dramatically due to stricter import policies in the EU. During most of the 1990s, the U.S. was the principal supplier of poultry meat to Poland and the Baltic States. Poultry meat exports are allowed to transship through the EU, and mostly consist of chicken leg quarters, legs, feet (paws) and mechanically separated turkey. Most of the meat was shipped to Greece and the Netherlands and goes to the countries of the former Soviet Union.

U.S. Poultry and Poultry Products, Eggs and Egg Products Exports January-December 2003, in U.S. Dollars

	EU15**	EU-10
0105 Live Poultry	8,327,000	411,000
0407 Bird Eggs	17,032,000	620,000
0408 Egg Products*	2,990,000	-
0207 Poultry Meat	29,039,000	61,454,000
1601-1602 Prepared meat	2,537,000	933,000

*including 3502.11 and 3502.19 - albumins, dried and other

** Includes transshipments

U.S. Exports to selected countries in '000 dollars

	Estonia	Latvia	Poland
1994	295	355	48,070
1995	48,761	1,288	44,833
1996	23,704	69,741	49,523
1997	16,768	90,660	45,590
1998	35,075	87,704	47,386
1999	79,012	135,798	26,253
2000	36,269	61,867	24,964
2001	2,169	28,949	53,437
2002	1,325	18,439	32,311
2003	3,271	24,172	28,223

U.S. Exports to selected countries in metric tons

	Estonia	Latvia	Poland
1994	423	343	62,459
1995	58,019	1,271	54,100
1996	26,508	67,990	56,920
1997	24,042	109,746	54,845
1998	52,178	131,882	61,029
1999	154,192	313,712	45,700
2000	70,879	141,141	51,248
2001	2,411	44,379	62,900
2002	2,121	44,173	65,035
2003	5,938	44,161	65,349

Source: European Commission, Eurostat, World Bank, USDA/ERS, USDA/FAS, U.S. Census Bureau, various media news stories

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

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

Week Ending April 10, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
LIQUID	95	303	2,170	2,832
FROZEN	0	0	0	14
DRIED	0	0	154	135
TOTAL	95	303	2,324	2,981

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

Week Ending April 10, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
LIQUID	18	0	1,167	1,579
FROZEN	85	0	419	1,169
DRIED	78	40	832	360
TOTAL	181	40	2,418	3,108

Inspected Shell Eggs

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

Week Ending April 10, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
JUMBO	0	30	50	106
EXTRA LARGE	780	780	5,010	2,550
LARGE	1,660	3,690	13,573	9,433
MEDIUM	480	735	12,360	15,957
UNGRADED	4,276	2,826	29,044	4,296
MISC	1,090	330	5,914	3,312
TOTAL	8,286	8,391	65,951	35,654

/1Comparable Week, to-date figures may not total due to rounding.
Data Source: Agriculture Canada, Poultry Development Division.
Source: USDA/AMS Poultry Programs, Market News Branch.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 10-Apr-04

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
HEAD	1,362	1,305	2,667
LAST WEEK	1,234	1,172	2,406
SAME WEEK YR AGO	1,955	1,221	3,176
TO-DATE/2004	17,870	17,683	35,553
TO-DATE/2003	23,960	18,883	42,843

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
HEAD	200	0	200
LAST WEEK	211	0	211
SAME WEEK YR AGO	281	8	289
TO-DATE/2004	3,200	40	3,240
TO-DATE/2003	4,334	57	4,391

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	1,562	1,305	2,867
LAST WEEK	1,445	1,172	2,617
SAME WEEK YR AGO	2,236	1,229	3,465
TO-DATE/2004	21,070	17,723	38,793
TO-DATE/2003	28,294	18,940	47,234

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	Apr 16, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

CHICKEN, WITH SKIN ADDED	Apr 16, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	15.00-18.00	13.00	141,200	-
WTD AVERAGE	16.50	13.00		
15-20%				
RANGE	13.75-17.00	11.00-16.00	2,168,400	1,209,600
WTD AVERAGE	15.00	13.44		
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.

CHICKEN	Apr 16, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

CHICKEN, WITH SKIN ADDED	Apr 16, 2004			
	PRICES (Cents per Pound)		VOLUME	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	13.50-16.25	-	1,180,000	780,000
WTD AVERAGE	15.21			
15-20%				
RANGE	14.50-19.00	12.00-16.00	2,198,400	676,000
WTD AVERAGE	16.58	13.77		
20% OR MORE				
RANGE	-	12.00	200,000	-
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 16 APRIL 2004.

The fresh tom breast meat market was mostly steady, frozen tom breast meat steady to fully steady and destrapped tenderloins were strong. Fresh tom breast meat demand was light with some buyers only taking regular commitments. Demand was good on destrapped tenderloins and light to fair on frozen tom breast meat. Offerings of destrapped tenderloins continued tight and frozen tom breast meat was light. The fresh mechanically separated turkey market (MST) was steady to firm with trading noted at higher trending price levels. Offerings were held with confidence. Domestic trading centered on a heavy volume of fresh MST, balance light. No export trading reported. Increased confidence was being noted into some export channels due to anticipated removal of restrictions into some countries. For domestic (fresh): tom necks 59, scapula 102, wing meat 105, frozen plant grade basted 20-22 lb. breasts 115 cents delivered.

FRIDAY, APRIL 16, 2004

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		R	29.02	812	29.47	1,060
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		R	31.33	120	32.60	200
MECHANICALLY SEPARATED 2/		R	35.00	40	36.33	120
THIGH MEAT - FROZEN		R	80.73	1,008	81.78	1,088

THURSDAY, APRIL 15, 2004

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	28.00	104
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	34.00		34.00	40
MECHANICALLY SEPARATED 2/		M	37.00	80
THIGH MEAT - FROZEN		M	95.00	80

WEDNESDAY, APRIL 14, 2004

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	28.00	104
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	34.00		34.00	40
MECHANICALLY SEPARATED 2/		M	37.00	80
THIGH MEAT - FROZEN		M	95.00	80

TUESDAY, APRIL 13, 2004

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	28.00		28.00	104
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		M	35.00	40
MECHANICALLY SEPARATED 2/		M	37.00	80
THIGH MEAT - FROZEN		M	95.00	80

MONDAY, APRIL 12, 2004

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	32.00-36.00		33.11	144
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	35.00		35.00	40
MECHANICALLY SEPARATED 2/	37.00		37.00	80
THIGH MEAT - FROZEN	95.00		95.00	80

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.