



INTERNATIONAL EGG AND POULTRY REVIEW

ISSN 1522-5100



U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

Romania HRI Food Sector

Romania is the second largest market in east-central Europe after Poland, with 21.7 million emerging consumers and a strategic position on the Black Sea. Romania has one of the fastest growing economies in Europe and the GDP growth expanded by an estimated 4.9 percent in 2003. Foreign direct investment inflows continue the ascendant trend, with an anticipated value of \$1.5 billion for 2004. In 2002 more than half of the Romanian population was living in cities 55.9%.

According with the Romanian Customs Directorate, imports of agri-food products reached \$1.7 billion in 2003, 40% higher than in 2002. About 33% of total agri-food imports were sourced from the EU. The value of U.S. exports to Romania was \$93 million (5.5%), to some extent lower than in 2002. The major imported products were poultry meat, soybeans, cigarettes, raw tobacco, pork meat, fish, nuts.

Monthly purchases in restaurants, Bucharest

Product	Romanian (\$/month)	U.S. origin (\$/month)
Pork	300,000	-
Beef	188,000	5,500
Poultry	569,000	105,000
Ocean fish & seafood	-	2,700

Source: Mednet Research 2003

The main foreign suppliers of poultry are the United States, Brazil and Hungary. The most frequently used meats are chicken legs, poultry liver, and turkey meat. The United States (49%) and Brazil (29%) were major supply sources of poultry to Romania in 2003. The U.S. has competitive prices compared to local producers, especially for chicken leg quarters that are preferred by the Romanian consumers.

Source: USDA/FAS

U.S. Frozen Poultry Exports to Romania, in metric tons

	January - December				
	1999	2000	2001	2002	2003
Chicken leg quarters	141	6,991	11,575	22,633	33,456
Chicken, cuts, offal, other	1,595	1,019	2,454	3,398	3,881
Chicken legs, excluding LQ	0	0	748	1,949	3,446
Chicken, not cut, other	283	0	48	1,114	1,535
*Chicken Cuts and Offal	194	24	64	260	962
Chicken Paws	0	0	236	0	958
Turkey Cuts	0	101	695	405	825
Chicken Offal	154	559	587	2,263	450
Other items	50	50	429	369	609
Total	2,417	8,745	16,835	32,392	46,122

*Fresh/Chilled

Source: Dept of Commerce, U.S. Census Bureau

U.S. Frozen Chicken Exports to Iraq, in metric tons

	January - December				January-February	
	2003		2003		2004	2004
	MT	Val	MT	Val	MT	Val
Leg Quarters	465.5	250	0.0	0	1129.6	719
Other Leg	24.5	13	0.0	0	73.5	42
Other Chicken	0.0	0	0.0	0	118.8	81
TOTAL	490.0	263	0.0	0	1321.9	842

Value in '000 USD

Source: Dept of Commerce, U.S. Census Bureau

EU Firm on Export Subsidies

The European Union is sticking by its position that it is only prepared to eliminate export subsidies on products of export interest to developing countries, despite growing pressure from other WTO members for a commitment by mid-year to negotiate an end-date for the end of export refunds on all products. The EU Commission's director for international affairs in agriculture, Mary Minch, insisted that the mandate for the Doha Round of farm trade talks "doesn't imply an end date for all products. I don't think that it's a good idea to say when, if or how WTO members could eliminate export subsidies at this stage," Minch told reporters during a week-long negotiating session in Geneva at the end of March, marking the re-launch of the agriculture talks.

Source: International Egg Commission

Mexico will export poultry meat to Japan

The President of the National Farmers Confederation (CNC), Heladio Ramirez, indicated that Mexico will export 3,000 MT of poultry meat to Japan during 2004. Mr. Ramirez added that, with this new trade agreement, it is urgent that the Mexican Government support producers by investing in the agricultural sector in order to train them and to increase the level of infrastructure. During a meeting with the President of the Agricultural Committee of the Lower House, the need to take advantage of the trade opportunities with Japan was discussed, given that Mexico imports about 70 percent of its food products. (Source: La Jornada, 02/12/04)

Negotiations to export poultry to the U.S. worked out

The President of the Poultry Producers Association, Cesar de Anda, stated that the project to export value-added poultry products and powder eggs to the United States has been worked out and by July Mexican producers can begin to export to that market. There have been negotiations with U.S. poultry producers and by the end of April Mexico expects that inspectors from the United States Department of Agriculture will have certified Mexican poultry plants. Currently there are only three plants authorized to export product to the United States; these are located in the states of Yucatan, Sinaloa, and Jalisco. Poultry exports were banned due the presence of Newcastle disease and salmonella, but Sinaloa, Sonora and Jalisco are free of these diseases and would be eligible to export value-added poultry products and processed eggs. (Source : Reforma 02/06/04)

Source: USDA/FAS

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

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

Week Ending April 17, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
LIQUID	196	301	2,366	3,335
FROZEN	0	49	0	63
DRIED	0	0	154	135
TOTAL	196	350	2,520	3,533

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

Week Ending April 17, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
LIQUID	29	41	1,196	1,620
FROZEN	45	37	464	1,206
DRIED	149	40	981	400
TOTAL	223	118	2,641	3,226

Inspected Shell Eggs

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

Week Ending April 17, 2004		Year-To-Date		
Type	2004	2003 /1	2004	2003
JUMBO	0	0	50	106
EXTRA LARGE	810	0	5,820	2,550
LARGE	180	1,430	13,753	10,863
MEDIUM	2,670	1,680	15,030	17,637
UNGRADED	9,123	3,720	38,167	8,016
MISC	270	30	6,184	3,342
TOTAL	13,053	6,860	79,004	42,514

/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 17-Apr-04

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,464	1,287	2,751
LAST WEEK	1,362	1,305	2,667
SAME WEEK YR AGO	1,751	1,235	2,986
TO-DATE/2004	19,334	18,970	38,304
TO-DATE/2003	25,711	20,118	45,829

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	341	9	350
LAST WEEK	200	0	200
SAME WEEK YR AGO	192	0	192
TO-DATE/2004	3,541	49	3,590
TO-DATE/2003	4,526	57	4,583

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	1,805	1,296	3,101
LAST WEEK	1,562	1,305	2,867
SAME WEEK YR AGO	1,943	1,235	3,178
TO-DATE/2004	22,875	19,019	41,894
TO-DATE/2003	30,237	20,175	50,412

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.

Apr 23, 2004

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	13.00-18.00	13.00-15.00	390,000	-
WTD AVERAGE	15.25	13.98		
15-20%				
RANGE	13.75-18.25	11.00-16.00	3,016,400	1,486,400
WTD AVERAGE	15.15	12.90		
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.

Apr 23, 2004

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	13.50-16.25	-	1,128,000	728,000
WTD AVERAGE	15.16			
15-20%				
RANGE	14.50-16.50	12.50-19.00	2,088,800	728,000
WTD AVERAGE	15.00	14.62		
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 23 APRIL 2004.

Tom bulk parts demand was good on drums for domestic and export shipments with inquiry noted from Mexico and the Middle East. Demand on tom necks was light at best and wings light to fair. Offerings of tom drums were being held with increased confidence, tom necks adequate to fully adequate and tom wings light to adequate. Hen drum demand was light to fair for domestic and export shipments, inquiry on the balance of hen parts was mostly for domestic shipments. Offerings ranged light to adequate. Trading centered on moderate to heavy volumes of tom drums for domestic and export shipments and on a fair volume of fresh tom breast meat for current shipments, balance light. Frozen destrapped tenderloins traded with -6 months age. For domestic: fresh scapula 104, frozen breeder tom breast meat 145 cents delivered. Livers traded at 20.50 cents delivered export.

FRIDAY, APRIL 23, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	29.00-31.00		29.32	760	29.61	986
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	30.00	156	30.00	156
TAILS						
MECHANICALLY SEPARATED 2/						
THIGH MEAT - FROZEN		W	89.00	40	89.00	80

THURSDAY, APRIL 22, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.00-33.00		30.80	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	28.00-34.00		30.00	156
TAILS		R	31.33	120
MECHANICALLY SEPARATED 2/		R	35.00	40
THIGH MEAT - FROZEN		W	89.00	40

WEDNESDAY, APRIL 21, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	29.00		29.00	26
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	31.33	120
MECHANICALLY SEPARATED 2/		R	35.00	40
THIGH MEAT - FROZEN	89.00		89.00	40

TUESDAY, APRIL 20, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		R	29.02	812
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	31.33	120
MECHANICALLY SEPARATED 2/		R	35.00	40
THIGH MEAT - FROZEN	89.00		89.00	40

MONDAY, APRIL 19, 2004**EXPORT TRADING**

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

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.