



INTERNATIONAL EGG AND POULTRY REVIEW

ISSN 1522-5100



U. S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

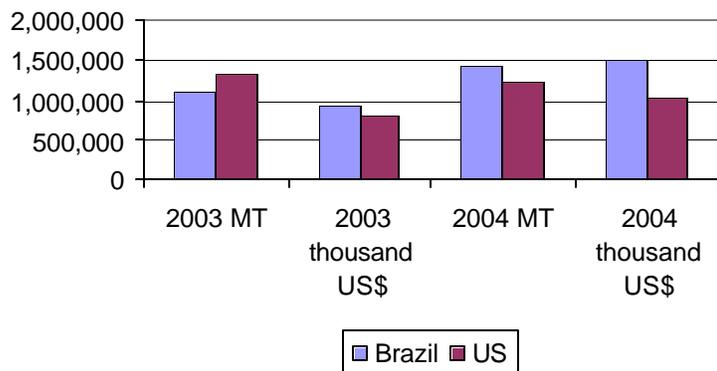
Market News Branch

Brazil

Brazil might pass the U.S. to become the largest poultry exporter in 2004. Brazil's exports continued to expand due to a favorable exchange rate, new export markets, outbreaks of highly pathogenic avian influenza around the world in 2004 and the continuing presence of highly pathogenic avian influenza in Asia. Exports to the EU should improve since the European Commission cancelled the special controls that had been imposed on Brazil. The EU began testing 100 percent of Brazilian broiler meat imports after several shipments tested positive for nitrofurans in 2002. In January 2004 the EU eased the testing requirement to 20 percent of shipments and in September 2004, the EU withdrew the 20 percent testing requirement.

For the first seven months of 2004, Brazil's poultry exports totaled 1.43 million metric tons (MMT) compared to U.S. poultry exports of 1.29 MMT. For the same period in 2003, Brazil had 1.10 MMT and the U.S. had 1.42 MMT.

**U.S. and Brazil Poultry Exports,
January-July 2003 and 2004**



Poultry production is expected to increase six percent for broilers and 14 percent for turkeys in 2005. Estimates for broiler production are 8,105,000 MT for 2004 and 8,620,000 MT for 2005. The estimated cost of production during the first half of 2004 was about US\$0.22 per pound, live weight, compared to US\$0.21 for the same period in 2003. Estimates for broiler exports are 2,255,000 MT in 2004 and 2,480,000 MT in 2005, up almost 20 percent. In 2003, Brazil produced 7,645,000 MT and exported 1,960,000 MT.

Turkey production climbed from 200,000 MT in 2003 to an estimated 220,000 MT in 2004 and a projected 250,000 MT in 2005. Exports are expected to climb from 112,000 MT in 2003 and to 128,000 MT in 2004 and 155,000 MT in 2005.

Source: USDA/FAS, Brazil Ministry of Agriculture, news wires

Brazil's Exports of Chicken Cuts

	Aug/03-Jul-04		Aug/02-Jul/03	
	'000 US\$	MT	'000 US\$	MT
Japan	408,073	256,070	191,088	179,830
Netherland	174,176	95,086	128,998	82,911
Hong Kong	136,826	195,019	100,970	196,806
Germany	103,908	57,215	176,768	117,868
Russia	73,506	89,475	105,284	198,370
UK	70,867	33,018	79,043	44,776
Singapore	49,140	46,970	33,939	45,339
So. Africa	46,901	91,394	21,136	62,899
Saudi Arabia	43,373	28,036	15,031	12,766
Spain	30,293	22,198	24,565	24,850
Ukraine	29,997	43,449	4,812	11,7970
UAE	28,901	22,999	14,364	14,574
Czech Republic	28,084	19,851	10,608	7,794
Canada	26,218	17,024	2,136	1,602
Romania	23,882	30,131	11,585	19,590
Sub-total	1,274,145	1,047,935	920,327	1,021,772
Others	200,921	229,650	77,209	112,347
Total	1,475,066	1,277,585	997,536	1,134,119

Source: Brazil Ministry of Agriculture

Avian Influenza Update

Further outbreaks of H5N1 Highly Pathogenic Avian Influenza (HPAI) were suspected in Malaysia, near the border with Thailand. Additional HPAI cases in poultry were reported in Thailand and Viet Nam reported new infected areas.

Thailand reported suspected cases of HPAI infection on September 16, 2004 in ducks and native chickens. An outbreak in broilers was confirmed and the 14,459 birds were culled. As of September 8, 2004, a total of 27 outbreaks in 11 provinces are subject to the 21 day surveillance period imposed by the Department of Livestock Development (DLD), Ministry of Agriculture and Cooperatives.

Viet Nam reported new H5N1 infections, the latest in Ho Chi Minh City on September 15, 2004. In Ho Chi Minh City, 421 households raise more than 881,000 quail, chickens and ducks.

Source: FAO/IDnews

http://www.fao.org/ag/AGA/AGAH/EMPRES/live_vis/e_warn.asp

World Supply & Utilization of Broilers and Turkeys, in million MT

	1997	1998	1999	2000	2001	2002	2003	2004F
Production	47.8	49.5	52.3	54.9	56.6	58.5	58.8	60.5
Consumption	47.3	48.8	51.6	53.8	55.2	56.8	57.0	58.1
*Exports	4.6	4.7	4.9	5.4	6.2	6.4	6.7	6.6

*Excludes intra-EU trade but includes intra-FSU trade

Source: USDA/ERS

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

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

Week Ending September 11, 2004	Year-To-Date			
TYPE	2004	2003 1/	2004 2/	2003
Liquid	256	460	11,104	11,593
Frozen	0	0	11	96
Dried	60	3	499	388
Total	316	463	11,614	12,077

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

Week Ending September 11, 2004	Year-To-Date			
TYPE	2004	2003 1/	2004 2/	2003
Liquid	79	251	5,520	4,094
Frozen	40	223	1,176	2,376
Dried	0	0	1,764	903
Total	119	474	8,460	7,373

Inspected Shell Eggs

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

Week Ending September 11, 2004	Year-To-Date			
TYPE	2004	2003 1/	2004 2/	2003
Jumbo	0	0	349	290
Extra Large	5,600	1,080	75,940	19,367
Large	7,068	1,640	163,636	76,426
Medium	1,752	2,430	76,212	43,527
Ungraded	11,076	7,204	218,988	102,060
Misc	0	0	15,504	12,642
Total	25,496	12,354	550,629	254,312

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week (s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section
Source: USDA/AMS Poultry Programs, Market News Branch.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 11-Sep-04

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	1,231	1,346	2,577
Last Week	1,464	1,571	3,035
Same week yr ago	1,121	1,597	2,718
To-date/2004	48,922	48,040	96,962
To-date/2003	54,095	50,502	104,597

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	153	0	153
Last Week	167	0	167
Same week yr ago	61	7	68
To-date/2004	8,457	91	8,548
To-date/2003	8,520	125	8,645

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

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

	LIGHT HENS	HEAVY HENS	TOTAL HENS
THOUSANDS			
Head	1,384	1,346	2,730
Last Week	1,631	1,571	3,202
Same week yr ago	1,182	1,604	2,786
To-date/2004	57,379	48,131	105,510
To-date/2003	62,615	50,627	113,242

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	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	19.00	40,800	-
WTD AVERAGE		19.00		

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15-20%				
RANGE	13.00-17.00	11.50-18.00	1,584,000	566,400
WTD AVERAGE	15.11	13.83		

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
20% OR MORE				
RANGE	-	12.50	81,600	-
WTD AVERAGE		12.50		

* 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	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.25-18.50	22.00	1,020,000	580,000
WTD AVERAGE	17.29	22.00		

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15-20%				
RANGE	16.50-23.00	17.00-19.00	1,648,000	1,128,000
WTD AVERAGE	19.96	18.02		

CHICKEN, WITH SKIN ADDED	September 17, 2004			
	PRICES		VOLUME	
	(Cents per Pound)			
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
20% OR MORE				
RANGE	-	17.50	120,000	-
WTD AVERAGE		17.50		

* 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 17 SEPTEMBER 2004.

Trade sentiment on tom bulk parts was steady to instances firm with full-cut wings in the strongest position. Demand slow to moderate with offerings held with confidence. Hen bulk parts trade sentiment steady to instances firm with 2-joint wings strongest. Demand mixed. Offerings of hen bulk parts short to instances light with necks the most available. Domestic trading was heavy on fresh tom breast meat, fair on fresh and frozen destrapped tenderloins, balance light. Export trading was fair on frozen thigh meat, balance slow. For domestic (fresh): wing meat with skin 106-113 mostly 106-108, scapula 107-112 cents delivered. For export: livers 20 shipping point, fresh mechanically separated turkey 18, fresh thigh meat 88 cents delivered.

FRIDAY, SEPTEMBER 17, 2004

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	43.00-44.00		43.67	120	43.63	320
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		F	34.00	80		
MECHANICALLY SEPARATED 2/	18.00		18.00	80	17.38	264
THIGH MEAT - FROZEN	81.00-84.00		81.56	320	82.94	744

THURSDAY, SEPTEMBER 16, 2004

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	43.60	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	34.00	80
MECHANICALLY SEPARATED 2/	17.50		17.50	40
THIGH MEAT - FROZEN	84.50		84.50	104

WEDNESDAY, SEPTEMBER 15, 2004

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	43.60	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	34.00	80
MECHANICALLY SEPARATED 2/	17.00		17.00	144
THIGH MEAT - FROZEN	84.00		84.00	80

TUESDAY, SEPTEMBER 14, 2004

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	43.00-44.00		43.60	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	34.00	80
MECHANICALLY SEPARATED 2/		R	17.73	212
THIGH MEAT - FROZEN	81.00		81.00	40

MONDAY 13, 2004

<u>EXPORT TRADING</u>	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		R	40.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	34.00	80
MECHANICALLY SEPARATED 2/		R	17.73	212
THIGH MEAT - FROZEN	81.50-85.00		84.30	200

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.