Welcome

Angie Snyder
Office of the Deputy Administrator, LPS Program
Livestock and Poultry
Economic Outlook

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AMS Annual Industry Conference
Egg, Fish, Poultry, and Red Meat Breakout Sessions
Doubletree Hotel by Hilton – Crystal City
Arlington, Virginia
October 26, 2016
Broiler Industry

- Supply
  - Production increasing in 2017 – up 2%
  - Live weights appear to have plateaued

- Demand
  - 2016 per capita disappearance 90.3 lbs, up 2%
  - 2017 per capita disappearance 91.8 lbs, up 2%
  - Exports up in 2017 by 5%

- Price Trends
  - 2017 wholesale whole bird—$0.84/lb, down 1%
  - Retail composite—$1.95/lb, up 3%
Turkey Industry

- Supply
  - Industry has recovered from HPAI
  - Production up in 2017 by 1.2%
  - Live weights continue to increase

- Demand
  - 2016 per capita disappearance 17.0 lbs, up 6%
  - 2017 per capita disappearance remains at 17.0 lbs
  - 2017 turkey exports up 12%

- Price Trends
  - 2017 wholesale whole hen $1.16/lb, down 3%
  - Retail whole bird $1.52/lb, up 1%
Egg Industry

- **Supply**
  - Industry beginning to transition to cage-free
  - Table egg production up 2% in 2017
  - Eggs broken up 3% in 2016

- **Demand**
  - Per capita disappearance 266 eggs in 2016, up 5%
  - Per capita disappearance unchanged in 2017
  - Exports up 14% in 2017

- **Price Trends**
  - 2017 wholesale Grade A large $0.99/doz, up 15%
  - Retail Grade A large $1.78/doz, up <1%
Cattle/Beef Industry

- **Supply**—Record high production
  - Production increase 5% in 2016 to 25 billion lbs.
  - Production increase 4% in 2017 to 26 billion lbs.
  - Imports down 9 and 11%

- **Demand**
  - Per capita disappearance 2016 55.4 lbs, up 3%
  - Per capita disappearance 2017 55.6 lbs, up slightly
  - Exports up 7 and 9%

- **Price Trends**
  - Current Retail Choice beef $5.72/lb, Wholesale $2.74/lb
  - Prices down 5% in 2016, up 2-3% in 2017
Swine/Pork Industry

- Supply—Record High Production
  - Production increase 2% in 2016 to 25 billion lbs.
  - Production increase 4% in 2017 to 26 billion lbs.
  - Imports up 2%,

- Demand
  - Per capita disappearance 2016 49.9 lbs, up slightly
  - Per capita disappearance 2017 51.4 lbs, up 3%
  - Exports up 4%, both years

- Price Trends
  - Current Retail price $3.79 per lb., wholesale price $1.55 lb.
  - Down 2-4% in 2016, Up 0-1% in 2017
Sheep/Lamb Industry

- **Supply**
  - Production increase 1% in 2016 to 152 million lbs.
  - Production flat in 2017
  - Imports up 2% in 2016, down 14% in 2017

- **Demand**
  - Per capita disappearance 2016 1.0 lbs.
  - Per capita disappearance 2017 0.9 lbs.

- **Price Trends**
  - Up 2-3% in both 2016 and 2017
Fish

- Catfish (Top 3 states)
  - Surface acres down 4% in 2016 from prior year
  - Broodfish numbers down 3%, Foodsize fish down 13%, Stockers up 13%

- Salmon
  - Harvest data not yet available
  - Sockeye harvest up, pink very low
Fish, cont’d.

- Pollock
  - BSAI Catch up 30,000 MT from 2015’s 1,310,000 MT
  - GOA Catch ongoing but up

- Fish/seafood prices up slightly in 2016, 1-2% in 2017
General Outlook

- Feed situation
  - Corn—Prices down 46 cents per bu. to $3.09 per bu.
  - Soybean meal—Prices up $8 per short ton to $338

- Trade
  - Continued strength in U.S. dollar in 2017, but forecast for imports down, exports up

*Note: All forecasts assume no new HPAI outbreak*
Questions?

Don’t forget to check out our monthly publication, “The Economic Landscape” available at

www.ams.usda.gov/AM Sv1.0/AMS Agricultural Analytics
QUALITY ASSESSMENT DIVISION

Annual Industry Meeting
October 26, 2016
Auditing & Processing Updates

- Oversights
- Grading
- Auditing
- Technical
Auditing & Processing Updates (cont’d)

- Further Processing Certification Program

- Checkloading

- Freezing Time and Temperature Requirement
FOOD SAFETY AND COMMODITY SPECIFICATIONS DIVISION

Annual Industry Meeting
October 26, 2016
Dr. Chandramohan Ch Chawan

1944 - 2016
Food Safety and Commodity Specification Division
Key Issues

- Performance-based Specifications
- Process Control Analysis
- Raised without Antibiotics
- *Salmonella* Dublin
- Case Count vs. Pounds
Agenda

- Poultry & Egg Products
- Beef & Pork Products
- Aquatic Products
Poultry and Egg Products

- New Product Development
  - Whole Muscle Chicken Fillet/Chicken Patty
  - Chicken Drumstick
  - Turkey Crumble
  - Egg Patty
Poultry and Egg Products (cont’d)

- Specification Review
  - Turkey Deli, Sliced
    - Packaging and sodium reduction
  - Turkey Taco
    - Flavor profile
  - Turkey Roast
    - Sodium reduction
  - Frozen Whole Egg
    - Extension of time to pasteurization
    - Addition of 2lb. carton
Poultry and Egg Products (cont’d)

- Future Objectives
  - Increased industry involvement/interaction
  - Update specification format
Beef & Pork Products - New

- Beef Strips
  - Lightly Seasoned

- Canned Chili w/ Beans
  - ≤ 300 mg Sodium /100g
  - ≤ 8 g Fat /100 g
Beef & Pork Products - Revisions

- Beef Stew
  - ≤ 325 mg Sodium /100 g
- Beef Crumbles
  - ≤ 300 mg Sodium /100 g
- Beef Patties
  - ≤ 300 mg Sodium /100 g
- Pulled Pork
  - ≤ 385 mg Sodium /100 g
Pollock Blocks

- Federal Purchase Program Specification (FPPS) for Once-Frozen Alaska Pollock Blocks

- Section 511 – QUALITY ASSURANCE
  Revise language to clarify inspection and grading requirements.
Tuna

- Updated Federal Purchase Program Specification (FPPS) for Canned/Pouch Tuna published in September 2016

- Added requirement - All tuna products shall be certified Kosher and include the registered Kashruth certification symbol of the certification agent.
Thank you....

Questions & Discussion
FOOD SAFETY AND COMMODITY SPECIFICATIONS DIVISION

ADL Update & Data Review

Annual Industry Meeting
October 26, 2016
Agenda

- ADL Meeting Summary
- FY2016 Microbiological Review
- Supplement 211 & 212 Vendor Performance Handouts
- Animal Handling & Welfare Review