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Highly Pathogenic Avian Influenza H5N1 Continues to Spread

In October, Turkey and Romania became the latest countries to confirm the presence of Highly Pathogenic Avian Influenza (HPAI) subtype H5N1 in domestic poultry. The virus is the same strain as in Asia. HPAI has never been reported in Turkey and was last reported in 1942 in Romania.

In Turkey, an outbreak of HPAI was first reported in a flock of 4.5-month-old turkeys. The backyard flock was kept in a sparsely populated area and a 3-km-radius protection zone and a 10-km-radius surveillance zone were quickly established around the infected flock. The protection zone contains 7 farms, 2 of which had broiler poultry (a total of 15,907 birds). The broilers were slaughtered under official veterinary supervision in predetermined slaughter houses and the carcasses were stored. The remaining 5 farms did not house poultry. According to the OIE, the transmission of the AI virus to humans by food consumption has not been reported. The virus in meat is killed by cooking at 70 degrees Celsius (158 degrees Fahrenheit) for several seconds.

Poultry farms in the surveillance zone were identified; military and police services set up roadblocks at the entrance to the region to check vehicles entering and exiting the protection and surveillance zones; selling live backyard poultry in local markets and hunting wild migratory birds in the region was prohibited.

In Romania, laboratory tests identified avian influenza H5N1. The Romanian Central Veterinary Authority set up a 3-km-radius protection zone and a 10-km-radius surveillance zone. Since H5N1 had been confirmed in Turkey, the European Commission had already been working on the assumption that the virus in Romania was H5N1 and appropriate measures with a surveillance zone had already been taken.

On October 14, 2005 after two days of emergency talks, EU veterinary experts agreed to new measures to prevent H5N1 from entering the EU-25. Precautionary measures include strengthening biosecurity measures on farms and introducing early detection systems in high risk areas such as wetlands or farms along migratory flyways. Member States will be required to prevent contact between wild birds and poultry in high-risk areas such as wetlands. This could include keeping poultry indoors in high risk areas. The EU was also sending experts to Bulgaria, which neighbors Romania and Turkey, after Bulgaria requested assistance. Bulgaria has increased custom checks, banned wild bird hunting and increased monitoring of migratory birds.

H5N1 was first reported in South Korea in December 2003, and was followed by outbreaks in Cambodia, China, Hong Kong, Indonesia, Japan, Thailand and Vietnam in January and February of 2004. Malaysia reported an outbreak of H5N1 in August, 2004. In July 2005, H5N1 appeared in Russia, Kazakhstan and Mongolia, followed by Tibet in August.

Source: World Organization for Animal Health (OIE), European Commission Press Release, FAO Technical Task Force on Avian Influenza, news wires

Romania's Poultry Industry

The Romanian poultry industry has been steadily expanding for the past five years. Poultry inventories were up 4 percent at the end of 2004, reaching 79.3 million at the end of 2004. Broiler meat production in industrial operations expanded by 11 percent, reaching 205,000 MT carcass weight at the end of the year. Romania has benefited from abundant feed grain and protein crops combined with high productivity, improved feed conversion ratio, and depressed mortality.

The seven largest operations account for about 50 percent of the country's commercial production and there are numerous smaller farms producing 1,500 – 2,000 MT per year. Individual households count for roughly one third of poultry meat domestic consumption.

In 2004, roughly 320,000 MT of broiler meat were sold domestically, equaling about 14 KG/capita per year. About 54,000 MT of poultry meat were consumed from self-production, especially in rural households. Urban retail preference is for fresh, branded, attractively packaged products and many supermarkets have recently given up selling bulk frozen chicken parts. Close to 50 percent of locally produced poultry meat is sold chilled, rather than frozen.

Broiler meat imports totaled 119,567 MT in 2004, and totaled 69,494 MT in the first six months of 2005. The U.S. supplied more than half of the total broiler meat imports in 2004 and Brazil supplied 26 percent. Only 6 poultry slaughter houses and 4 processing units fully comply with EU requirements and are eligible to ship to Member States. Romania is scheduled to receive EU membership in January 2007.

Source: USDA/FAS

Japan Imports: Frozen Broilers (in MT)					
	U.S.	China*	Brazil	Thailand**	Total
2003					
May	3,124	6,770	13,443	12,338	35,675
June	2,264	52	14,128	14,191	30,635
July	8,955	122	16,732	16,774	42,583
YTD	28,234	46,027	89,071	97,810	261,142
2004					
May	245	108	29,120	8	29,481
June	245	174	22,468	31	22,918
July	595	106	27,931	0	28,632
YTD	5,662	7,981	159,404	12,238	185,285
2005					
May	3,457	212	29,522	2	33,193
June	3,265	88	36,120	2	39,475
July	1,447	85	33,111	7	34,650
YTD	16,979	756	212,435	33	230,203

*Japan suspended imports from May 12, 2003 through August 19, 2003 and again in January 2004 due to the detection of H5N1.

**Japan suspended imports after H5N1 was detected in January 2004.

Source: ALIC, Japan Ministry of Agriculture Forestry and Fisheries

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

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

Week Ending October 08, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	351	704	13,469	13,731
Frozen	0	0	130	11
Dried	89	40	579	589
Total	440	744	14,178	14,331

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

Week Ending October 08, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	224	67	5,549	6,942
Frozen	0	81	708	1,447
Dried	0	0	371	1,853
Total	224	148	6,628	10,242

Inspected Shell Eggs

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

Week Ending October 08, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	0	179	378
Extra Large	1,970	7,630	168,745	157,794
Large	4,570	18,653	262,688	328,413
Medium	2,154	3,240	86,419	103,939
Ungraded	7,320	9,720	149,914	254,382
Misc	0	0	8,053	16,790
Total	16,014	39,243	675,998	861,696

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.

U.S./Canadian Live Poultry Slaughtered Under Inspection

W/E 8-Oct-05 (PRELIMINARY)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,250	1,445	2,695
Last Week	1,250	1,132	2,382
Same week yr ago	1,270	1,512	2,782
To-date/2005	58,522	56,594	115,116
To-date/2004	54,574	54,002	108,576

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	136	18	154
Last Week	218	0	218
Same week yr ago	185	8	193
To-date/2005	10,476	58	10,534
To-date/2004	9,789	98	9,887

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	1,386	1,463	2,849
Last Week	1,468	1,132	2,600
Same week yr ago	1,455	1,520	2,975
To-date/2005	68,998	56,652	125,650
To-date/2004	64,363	54,100	118,463

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.

Oct 14, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	22.00	81,600	-
WTD AVERAGE		22.00		
15-20%				
RANGE	16.00-20.00	13.00-22.00	2,212,000	1,254,800
WTD AVERAGE	17.91	16.13		
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.

Oct 14, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	19.00	18.00-21.00	609,000	208,000
WTD AVERAGE	19.00	19.10		
15-20%				
RANGE	16.00-21.00	13.00-19.00	1,952,000	832,000
WTD AVERAGE	18.13	15.57		
20% OR MORE				
RANGE	-	14.00	80,000	-
WTD AVERAGE		14.00		

* 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 14 OCTOBER 2005.

The market tone on fresh tom breast meat was steady as supplies became more available. Destrapped tenders, scapula and wing meat with skin were steady and supplies mostly adequate. Less than trucklot quantities of fresh scapula moved at 126-129 cents delivered. Demand on white meat items was mostly moderate. Ground turkey packed 2/10 traded at 74 cents. Export activity was light. Fresh tom drums moved at open prices for next week's delivery.

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
FRIDAY, OCTOBER 14, 2005						
DRUMSTICKS, TOMS		W	45.00	104	44.72	144
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		R	32.00	80	32.00	80
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	95.00	F	26.00	40	94.50	240
			95.00	40		

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
THURSDAY, OCTOBER 13, 2005						
DRUMSTICKS, TOMS		W	45.00	104		
WINGS FULL-CUT - TOMS		R	42.57	280		
WINGS, V-TYPE, TOM						
TAILS	32.00		32.00	80		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		F	26.00	40		
		T	94.40	200		

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
WEDNESDAY, OCTOBER 12, 2005						
DRUMSTICKS, TOMS	45.00		45.00	104		
WINGS FULL-CUT - TOMS		R	42.57	280		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		F	26.00	40		
		T	94.40	200		

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
TUESDAY, OCTOBER 11, 2005						
DRUMSTICKS, TOMS	44.00		44.00	40		
WINGS FULL-CUT - TOMS		R	42.57	280		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	94.00-96.00	F	26.00	40		
			94.40	200		

**NO EXPORT TRADING REPORTED
ON MONDAY, OCTOBER 10, 2005
DUE TO COLUMBUS 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.