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U.S. Department of Agriculture Agricultural Marketing Service Poultry Programs Market News and Analysis Branch

FSIS Library of Exports Update

Recently Revised List of Countries Eligible to Export Poultry and Egg and Egg Products to the US as of September 28, 2007:

Country	Date	Country	Date
New Zealand*	24-Sep-07	Canada	27-Aug-07
Mexico**	27-Aug-07	Australia*	9-Jul-07

Recently Revised List of Eligible US Plants for Poultry and Egg and Egg Product Exports as of September 28, 2007:

Country	Date	Country	Date
Russia	25-Sep-07	Australia	30-Aug-07
Japan***	23-Aug-07	Egypt	9-Aug-07
South Africa	31-Jul-07	Mexico	24-Jul-07

Recently Revised Export Requirements as of September 28, 2007:

Country	Date	Country	Date
Bulgaria****	25-Sep-07	Romania****	25-Sep-07
Germany****	24-Sep-07	Russia	18-Sep-07
Japan	14-Sep-07	Hong Kong	11-Sep-07
Cuba	7-Sep-07	Indonesia	31-Aug-07
China*****	21-Aug-07	Thailand	9-Aug-07
Philippines	8-Aug-07	Mexico	3-Aug-07

Note: * Ratites only; ** Mexico approved to export only processed poultry products slaughtered under Federal inspection in the US or in a country eligible to export slaughtered poultry to the US; *** People's Republic of China; *** Cold Storage Facilities; **** Products harmonized by the EU; ***** People's Republic of China
Source: USDA FSIS

Thai Poultry Exports ('000 MT)

	2003	2004	2005	2006
Germany	59,972	5,706	40	102
HK	9,141	265	56	43
Japan	179,028	10,414	1,335	1,910
Lao	0	16	9	34
UK	13,666	1,171	2,670	1,117
Vietnam	185	342	591	7,798
Other	109,651	8,748	367	416
Total	371,643	26,663	5,068	11,421

Note: HK = Hong Kong; Lao = Lao Republic; UK = United Kingdom
Source: Thai Customs Department

Thailand Broiler Consumption

Domestic consumption is expected to rebound 4% after the new general election in early 2008, which has hampered economic growth due to political tension, and in anticipation of higher prices on other proteins. 2007 broiler meat consumption is projected to be slightly higher than 2006 levels, due to the unfavorable economic situation associated with a military coup in late 2006 and political uncertainty, and increasing chicken meat prices.

Thailand Broiler Production

In 2008, Thailand's broiler meat production is projected to increase at least 8%, due to improved market conditions and increased productivity. Production estimates for 2007 have been lowered as processors decreased their chick production from 18-19 million birds per week in late 2006 to 14-15 million birds per week at present in response to business losses in 2006 and large stocks in early 2007. These decreased supplies are expected to last through the remainder of 2007.

Feed costs rose 3-4% in the first 7 months of 2007 from the same period a year ago to about 29 baht/kg (39 cents/pound) and are currently at 29.50 baht/kg (about 40 cents/pound). Production costs for 2008 are estimated to be 28-29 baht/kilogram (38-39 cents/pound), which is close to the 2007 level.

Poultry production, which represents half of Thailand's total feed corn consumption, is expected to lower Thai corn exports for MY 2007/2008 from the previous year. Domestic corn production is expected to increase slightly to 3.85 million tons with a higher average yield in MY 2007/2008 from the previous year due to favorable rainfall. Corn acreage and imports are also projected to increase in MY 2007/2008 with domestic prices expected to be higher than the projected flat export prices.

Thailand Broiler Exports

Exports of cooked chicken meat are expected to increase at least 10% in 2008, due to strong demand from the EU and Japan. Chicken meat exports in 2007 are estimated to reach 290,000 MT based on export figures from the first half of 2007 and market reports. From January through June of 2007 the EU (49%) and Japan (40%) continued to be major export markets of cooked Thai chicken meat.

Exports of Thai broiler meat have and are expected to increase due to food safety concerns with one of its biggest competitors, China, and strong demand from the EU under the EU quota administration. Under the agreement, Thailand received 92,610 MT out of the total quota of 264,245 MT for salted poultry meat (EU HS02109939). In-quota imports will be subject to a tariff rate of 15.4%, while out-of-quota imports will be at a rate of 1,300 €/ton. For cooked chicken meat (EU HS16023219) Thailand received 160,033 MT out of the total quota of 250,953 MT. In-quota imports will be subject to an 8% tariff rate, while out-of-quota imports of cooked chicken will be at a rate of 1,024 €/ton.

Thailand benefits from the agreement because the allocated quotas for both salted poultry meat and cooked chicken meat are higher than historical averages of Thai poultry exports to the EU, the EU reduced a bound tariff rate for in-quota cooked chicken meat for Thailand from 10.9% to 8%, and out-of-quota Thai cooked products will be cheaper than out-of-quota Brazilian products. At present, Thailand is working to convince the EU and Japan to accept the compartmentalization practice initiated by the World Animal Health Organization (OIE) to allow Thailand to export raw/uncooked chicken meat to these markets again regardless of AI disease status. A pilot project is in the works for a couple integrated companies with the Japanese in late 2007.

No new trade policies have been developed since March of 2007. However Thailand's Ministry of Agriculture and Cooperatives, Department of Livestock Development (DLD) announced July 26, 2007 the suspension of live poultry and poultry carcasses from Nebraska, due to the detection of low pathogenic avian influenza (LPAI). The ban on California, North Carolina, and Missouri was lifted June 8, 2007, yet the DLD is now requiring all US states animal health certificates to include the statement "I hereby declare that the goods are derived from origin of animals which is free from Avian Influenza and Newcastle diseases."
Source: USDA FAS/various news wires

INSPECTED EGG PRODUCTS-
U.S. & CANADA IMPORT/EXPORT TRADE

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

Week Ending	September 22, 2007		Year-To-Date	
Type	2007	2006 /1	2007 /2	2006
Liquid	104	491	2,815	7,572
Frozen	0	0	65	172
Dried	0	40	489	490
Total	104	531	3,369	8,234

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

Week Ending	September 22, 2007		Year-To-Date	
Type	2007	2006 /1	2007 /2	2006
Liquid	140	54	12,104	2,871
Frozen	10	100	276	866
Dried	40	0	739	66
Total	190	154	13,119	3,803

Inspected Shell Eggs

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

Week Ending	September 22, 2007		Year-To-Date	
	2007	2006 /1	2007 /2	2006
Jumbo	0	0	0	150
Extra Large	2,720	2,790	37,239	67,671
Large	3,300	5,420	58,950	128,526
Medium	1,650	1,080	42,509	67,662
Ungraded	14,520	16,560	75,638	107,618
Misc	0	780	7,105	6,975
Total	22,190	26,630	221,441	378,602

/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 & Analysis

U.S./Canadian Live Poultry Slaughtered Under Inspection

Week Ending September 22, 2007 (Preliminary)

U.S. fowl slaughtered domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,102	1,548	2,650
Last Week	947	1,551	2,498
Same week yr ago	1,054	1,384	2,438
To-date/2007	41,900	55,095	96,995
To-date/2006	41,618	56,173	97,791

U.S. fowl slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	303	0	303
Last Week	463	3	466
Same week yr ago	94	0	94
To-date/2007	9,827	26	9,853
To-date/2006	5,964	26	5,990

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	1,405	1,548	2,953
Last Week	1,410	1,554	2,964
Same week yr ago	1,148	1,384	2,532
To-date/2007	51,727	55,121	106,848
To-date/2006	47,582	56,199	103,781

Source: USDA AMS Poultry Programs, Market News & Analysis Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

FOB SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

September 28, 2007

CHICKEN WITH SKIN ADDED

FAT CONTENT	---- PRICES ----		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	21.00	16.00	154,000	-
WTD AVERAGE	21.00	16.00		
15-20%				
RANGE	20.00	11.00-15.75	1,167,200	571,200
WTD AVERAGE	20.00	12.41		
20% OR MORE				
RANGE	-	13.50	81,600	-
WTD AVERAGE		13.50		

* 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

FOB SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

September 28, 2007

CHICKEN WITH SKIN ADDED

FAT CONTENT	---- PRICES ----		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	18.00	15.00-16.00	502,000	262,000
WTD AVERAGE	18.00	15.83		
15-20%				
RANGE	16.00-21.00	11.00-16.00	1,830,400	1,070,400
WTD AVERAGE	17.78	13.56		
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, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 SEPTEMBER 2007.

The market tone on fresh tom breast meat was steady to barely steady, balance of fresh white meat generally steady. Fresh white meat demand light to moderate with instances of buyers canceling loads of fresh tom breast meat noted for October. Offerings of fresh tom breast meat light to instances fully adequate mostly adequate, balance of fresh white meat generally adequate. The market tone on frozen white meat was barely steady to weak on scapula, steady to barely steady on destrapped tenderloins and wing meat with skin, balance mostly steady. Demand light to moderate. Offerings of frozen scapula adequate to burdensome, frozen destrapped tenderloins and wing meat with skin adequate to fully adequate, frozen tom breast meat spotty. Trading was slow to instances moderate and centered on fresh tom breast meat. For domestic: tails 28, fresh wing meat with skin 94-97 mostly 94, scapula - fresh 116, frozen -6 months age 92 November shipments, Grade A non-basted breasts - 8-10 lb. 140, 10-12 lb. 180, 14-18 lb. 195, 18 lb. and heavier 200 cents delivered.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, SEPTEMBER 28, 2007	RANGE	CODE 1/	PRICE	(000)	PRICE	(000)
DRUMSTICKS, TOMS		R	60.00	160	58.35	536
WINGS FULL-CUT - TOMS		R	49.00	40	48.60	50
WINGS, V-TYPE, TOM		F	62.00	104		
TAILS		R	25.50	52	26.16	166
MECHANICALLY SEPARATED 2/		M	17.50	208	17.50	208
THIGH MEAT - FROZEN		R	90.30	92	90.30	92

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
THURSDAY, SEPTEMBER 27, 2007	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	60.00		60.00	160
WINGS FULL-CUT - TOMS	49.00		49.00	40
WINGS, V-TYPE, TOM		F	62.00	104
TAILS	25.50		25.50	52
MECHANICALLY SEPARATED 2/		M	17.50	208
THIGH MEAT - FROZEN	89.00-92.00		90.30	92

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
WEDNESDAY, SEPTEMBER 26, 2007	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		M	57.65	376
WINGS FULL-CUT - TOMS		M	47.00	10
WINGS, V-TYPE, TOM		F	62.00	104
TAILS	26.50		26.50	104
MECHANICALLY SEPARATED 2/		M	17.50	208
THIGH MEAT - FROZEN				

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
TUESDAY, SEPTEMBER 25, 2007	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		M	57.65	376
WINGS FULL-CUT - TOMS		M	47.00	10
WINGS, V-TYPE, TOM		F	62.00	104
TAILS		M	26.00	10
MECHANICALLY SEPARATED 2/		M	17.50	208
THIGH MEAT - FROZEN		T	88.43	184

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
MONDAY, SEPTEMBER 24, 2007	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	57.00-60.00		57.65	376
WINGS FULL-CUT - TOMS	47.00		47.00	10
WINGS, V-TYPE, TOM		F	62.00	104
TAILS	26.00		26.00	10
MECHANICALLY SEPARATED 2/	17.00-18.00		17.50	208
THIGH MEAT - FROZEN		T	88.43	184

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.