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Agricultural Marketing Service

**Poultry Programs** 

Market News and Analysis Branch

## **Argentina Poultry and Egg Situation**

According to USDA FAS data, Argentine broiler production and exports accounted for 1.9% and 0.8% respectively of world totals in 2007, which was far behind the US (23.9% and 36.2%) and Brazil (15.2% and 40.4%). However in the first half of 2008, broiler meat and egg and egg product exports increased from 2007 levels. Argentina's domestic consumption was 1,226,000 metric tons (MT) in 2007. Source: Senasa DNFA DTI/USDA FAS

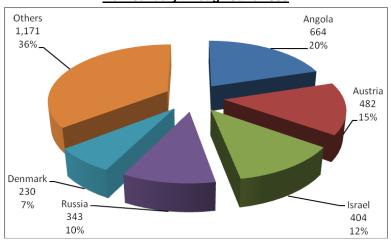
## Comparison of Top Argentine Egg and Egg By-Product Exports from January through June (MT)

	Angola			Austria			Israel			
	<u>2007</u>	2008	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	
Shell Eggs	322	637	+98	10	8	-20	-	403	-	
Eggs*	188	27	-86	317	177	-44	-	-	-	
Yolk	-	-	-	244	187	-23	-	-	-	
Albumin	-	-	-	178	109	-39	-	-	-	
	R	ussia		Denmark			C	Others		
	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	
Shell Eggs	-	4	-	-	-	-	214	288	+35	
Eggs*	-	56	-	163	203	+25	383	468	+22	
Yolk	356	110	-69	25	-	-	435	273	-37	
Albumin	32	171	+34	-	27	-	232	141	-39	

Note: Eggs\* = Eggs for Industrial Use. % = Percentage Change.

Source: Senasa DNFA DTI

## Argentine Egg and Egg By-Product Exports by Destination (MT) from January through June 2008



Note: Egg and Egg By-Products include shell eggs, eggs for industrial use, yolk, and albumin. Source: Senasa DNFA DTI

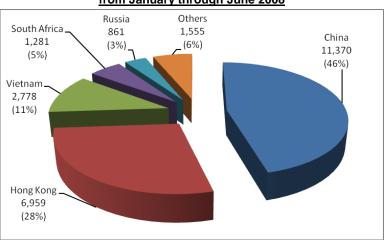
# Comparison of Top Argentine Broiler By-Product Exports from

Comp	Comparison of Top Argentine Broiler By-Product Exports from									
	January through June (MT)									
		China		Hor	Hong Kong			Vietnam		
	<u>2007</u>	<u>2008</u>	<u>%</u>	2007	2008	<u>%</u>	2007	2008	<u>%</u>	
Paws	8,316	9,882	+19	6,789	6,794	-	-	180	-	
Wings	1,913	1,489	-22	183	166	-9	800	2,545 -	+218	
Trim	-	-	-	-	-	-	-	53	-	
	Sou	ıth Afric	ca	R	Russia			Others	;	
	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>	
Paws	134	-	-	-	-	-	52	187 -	+260	
Wings	1,112	629	-43	615	862	+40	382	1,015	+166	
Trim	2,667	651	-76	l -	-	-	769	350	-54	

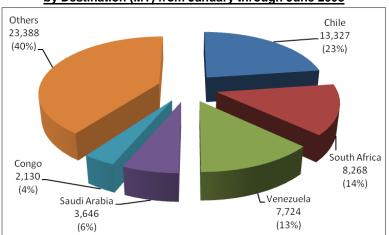
Note: Trim = Broiler Trimming. % = Percentage Change.

Source: Senasa DNFA DTI

## Argentine Exports of Broiler By-Products by Destination (MT) from January through June 2008



## **Argentine Broiler Meat Exports Excluding Poultry By-Products** by Destination (MT) from January through June 2008



Note: Broiler By-Products includes chicken paws, wings, and trimmings. Other chicken includes whole broilers, breasts, legs or hind limbs, hind quarters, poultry carcasses, boneless meat, mechanically deboned meat, chuck neck, and fore Source: Senasa DNFA DTI quarter.

## Comparison of Top Argentine Broiler Meat Exports from January

through June (MI)									
		Chile		So	uth Af	rica		Venezue	ela
	<u>2007</u>	<u>2008</u>	<u>%</u> -2	2007	2008	<u>%</u>	<u>2007</u>	<u>2008</u>	<u>%</u>
Whole	9,862	9,658	-2	3,003	1,951	-35	-	7,435	-
Breast	371	944	+154	67	49	-27	-	289	-
Leg	624	1,225	+96	481	256	-47	-	-	-
HQ	387	922	+138	58	1,017	+55	-	-	-
MDM	-	527	-	-	1,181		-	-	-
	Sau	di Arab	oia		Congo	)		Others	;
	2007	2008	<u>%</u>	2007	2008	%	2007	2008	<u>%</u>
Whole	3,198	3,646	+14	1,605	1,100	-31	10,720	13,645	+27
Breast	-	-	-	-	-	-	5,656	4,963	-12
Leg	-	-	-	-	-	-	1,160	2,086	+80
HQ	-	-	-	-	-	-	102	1,106	+984
MDM	-	-	-	-	50	-	-	399	-

Note: Whole = Whole Broiler; HQ = Hind Quarter; MDM = Mechanically Deboned Meat. % = Percentage Change. Source: Senasa DNFA DTI

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

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

Week Endir	ng July 26, 200	Year-To	-Date	
Туре	2008	2007 /1	2008 /2	2007
Liquid	0	0	396	2,462
Frozen	0	13	39	25
Dried	40	38	406	447
Total	40	51	841	2,934

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

Week Ending July 26, 2008			Year-To	o-Date
Type	2008	2007 /1	2008 /2	2007
Liquid	632	490	11,183	9,474
Frozen	0	3	327	259
Dried	25	40	393	589
Total	657	533	11,903	10,322

#### Inspected Shell Eggs

U.S Exports to Canada, In 30-Dozen Cases (Preliminary)									
Week Ending	July 26, 200	)8	Year-Te	o-Date					
	2008	2007 /1	2008 /2	2007					
Jumbo	0	0	0	0					
Extra Large	1,500	1,200	33,190	24,679					
Large	2,600	3,520	38,063	45,166					
Medium	420	2,370	25,631	31,715					
Ungraded	1,410	1,008	215,324	**24,056					
Misc	0	840	1,562	***4,885					
Total	5.930	8.938	313.770	130.501					

<sup>\*\* 2007</sup> total includes 528 for the week ending July 21, 2007.

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

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

## U.S./CANADIAN LIVE POULTRY-SLAUGHTERED UNDER INSPECTION

Week Ending 26-Jul-08 (Preliminary)

U.S. fowl slaughtered domestically									
Light Hens Heavy Hens Total H									
	Thousands								
Head	1,465	1,812	3,277						
Last Week	1,434	1,873	3,307						
Same week yr ago	1,075	1,730	2,805						
To-date/2008	42,050	47,549	89,599						
To-date/2007	33,442	42,841	76,283						

U.S. fowl slaughtered in Canada									
Light Hens Heavy Hens Total HensThousands									
Head	470	0	470						
Last Week	412	0	412						
Same week yr ago	296	3	299						
To-date/2008	9,802	38	9,840						
To-date/2007	7,449	23	7,472						

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	1,935	1,812	3,747
Last Week	1,846	1,873	3,719
Same week yr ago	1,371	1,733	3,104
To-date/2008	51,852	47,587	99,439
To-date/2007	40,891	42,864	83,755

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

#### NATIONAL MECHANICALLY SEPARATED CHICKEN

(FOB Shipper Dock or equiv., negotiated prices in trucklot and less-than-trucklot volumes reported in thousand lb. quantities, cents/lb.; delivery within 2 weeks.)

The MSC market tone remained steady to fully steady. Offerings of fresh 15-20% were well cleared with the remainder in close balance to tight. Inquiry for fresh and frozen was moderate to good. Supplies of raw materials continued tight and sought after. Domestic trading was good. Export demand was good with best inquiry from Mexico, Central American and Asian countries. All schedules were full time with a few disruptions noted. Frame values were steady ranging 5 to 9 cents FOB, mostly 7 to 9 cents.

## Weekly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)

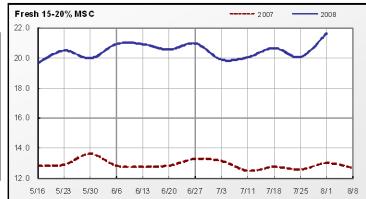
		Frozen		Fresh			
Fat Content	1-Aug-08	Last Week	Last Year	1-Aug-08	Last Week	LastYear	
15% or Less							
Price Range	-	-	18.00	24.00 - 25.00	23.00 - 24.50	15 00-16.00	
Wtd Avg Price			18.00	24.38	23.57	15.88	
Volume Traded	-	-	261	424	140	321	
Volume Exported	-	-	261	-	-	-	
15-20%							
Price Range	19.00 - 34.00	25.50 - 30.00	17.00-21.00	18.00 - 29.00	17.00 - 25.00	11.00-16.00	
Wtd Avg Price	26.94	28.00	17.96	21.65	20.07	1271	
Volume Traded	2,191	1,474	1,656	3,455	2,901	2,210	
Volume Exported	1,547	1,274	1,416	612	266	411	
20% or More							
Price Range	-	-	-	21.00	-	14.00	
Wtd Avg Price			-	21.00		14.00	
Volume Traded	-	-	-	156	-	80	
Volume Exported	-	-	-	-	-	-	



#### Monthly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)

	Frozen			Fresh			
Fat Content	Jul 2008	Jun 2008	Jul 2007	Jul 2008	Jun 2008	Jul 2007	
15% or Less							
Wtd Avg Price	30 00	26.00	17.93	23.72	24.78	15.84	
Volume Traded	40	164	1,169	647	684	1,366	
Volume Exported	-	164	1,047	-	-	-	
15-20%							
Wtd Avg Price	27.53	27.60	17.81	20.16	20.83	1271	
Volume Traded	5,069	5,261	6,151	12,334	10,252	8,597	
Volume Exported	4,269	4,620	5,303	2,830	1,345	1,835	
20% or More							
Wtd Avg Price	-	-	-	-	-	14.00	
Volume Traded	_	-	-	-	-	280	
Volume Exported	-	-	-	-	-	-	

Note: Volume exported refers to that portion of the total volume that is destined for export markets.



<sup>\*\*\* 2007</sup> total includes 840 for the week ending July 21, 2007.

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

<sup>/2</sup> Includes revisions to previous week(s)

NATIONAL YOUNG TURKEY PARTS, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 01 AUGUST 2008.

The market tone on tom drums was steady to instances weak, tails steady to fully steady, balance of tom bulk parts mostly steady with instances of increased confidence noted on necks and full-cut wings. Demand moderate to good, best for export. Offerings of tom drums in a full range, tails light and spotty, tom wings and necks adequate to fully adequate with some sellers' inventories becoming better balanced in response to the increased activity. The market tone on thigh meat was steady to fully steady with cautiousness noted. Demand light to moderate. Offerings mixed, light to instances fully adequate. Some increased demand was noted on tom breast meat as some buyers take additional contract loads in response to an increase in further processed demand. Domestic trading was active on 4-8 lb. breasts, slow to moderate on the balance of items. Export trading was active on fresh and frozen tom drums, balance slow to moderate. For domestic: hearts 26, tails 39-42, breeder wings 40, fresh tom wings 43, fresh wing meat with skin 94.50, fresh scapula 111-125, fresh breast trim 122-133, plant grade basted 20-24 lb. breasts 160 cents delivered. For export: fresh tom drums 50-51, fresh thigh meat 102 cents delivered.

EXPORT TRADING FRIDAY, AUGUST 01, 2008 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/	PRICE RANGE 49.50-52.00 42.00-46.00 58.00-64.50 43.00	L.S.T. CODE 1/	WTD AVG PRICE 50.67 43.85 62.33 43.00 27.50	VOLUME (000) 810 350 324 80 80	WEEKLY WTD AVG PRICE 50.96 43.06 62.33 42.03 27.50	WEEKLY VOLUME (000) 912 2,008 324 155 80
THIGH MEAT - FROZEN  EXPORT TRADING THURSDAY, JULY 31, 2008 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	105.50-109.0  PRICE RANGE  41.00 27.00-28.00	L.S.T. CODE 1/ W W F	107.60  WTD AVG PRICE 54.00 42.80 64.00 41.00 27.50 101.67	540  VOLUME (000) 54 1,456 810 40 80 120	107.60	540
EXPORT TRADING WEDNESDAY, JULY 30, 2008 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	PRICE RANGE 54.00 42.00-45.00	L.S.T. CODE 1/ F T F F	WTD AVG PRICE 54.00 42.80 64.00 41.00 24.00 101.67	VOLUME (000) 54 1,456 810 35 80 120		
EXPORT TRADING TUESDAY, JULY 29, 2008 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	PRICE RANGE 52.00 44.00	L.S.T. CODE 1/ F F F	WTD AVG PRICE 52.00 44.00 64.00 41.00 24.00 101.67	VOLUME (000) 8 40 810 35 80 120		
EXPORT TRADING MONDAY, JULY 28, 2008 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	PRICE RANGE 52.50 43.50	L.S.T. CODE 1/ F W F F	WTD AVG PRICE 52.50 43.50 64.00 41.16 24.00 101.67	VOLUME (000) 40 162 810 345 80 120		

<sup>1/</sup> 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.