

INTERNATIONAL EGG AND POULTRY REVIEW



U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News and Analysis Branch

Association of Southeast Asian Nations

At the ASEAN Summit in July, 2009, Secretary of State Hillary Rodham Clinton announced the U.S. intension to open a mission to ASEAN in Jakarta with a resident Ambassador. The Association of Southeast Asian Nations (ASEAN) includes 10 countries with a combined population of 584 million people and an international merchandise trade of \$1,710.4 billion in 2008. U.S. trade with ASEAN countries totaled \$182 billion in 2008 in two-way trade.

Indonesia, Malaysia, Philippines, Singapore and Thailand formed ASEAN in 1967. Membership in ASEAN grew to include Brunei Darussalam (1984), Vietnam (1995), Lao PDR and Myanmar (1997) and Cambodia (1999). The aims of the Association are (1) to accelerate economic growth, social progress and cultural development in the region and (2) promote regional peace and stability through respect for justice and the rule of law.

ASEAN has Free Trade Agreements with China, Japan, Korea, and Australia and New Zealand. The ASEAN-India Trade in Goods Agreement was concluded in August after six years of negotiations and will enter into effect on January 1, 2010 once India and at least one ASEAN Member State notify completion of their internal ratification process.

	Poultry* Meat Production, in metric tons								
	2003	2004	2005	2006	2007				
Brunei	14,179	16,014	14,069	16,392	18,390				
Cambodia	26,500	26,550	26,200	25,450	25,550				
Indonesia	1,138,960	1,213,121	1,147,060	1,284,679	1,339,945				
Lao	17,800	19,430	19,740	20,540	21,420				
Malaysia	846,654	927,490	967,000	1,030,000	1,042,000				
Philippines	658,811	681,385	671,185	663,355	693,578				
Singapore	91,505	72,587	81,532	80,798	88,700				
Thailand	1,299,775	964,103	1,035,805	1,047,730	1,071,797				
Vietnam	455,521	404,609	410,090	430,400	442,800				
*Includes ch	nicken, turke	ey, ducks, ge	ese and gui	nea fowl					

U.S. poultry meat exports to the ten ASEAN countries totaled 127,185 metric tons valued at \$146 million in 2008. For the first half of 2009 exports to ASEAN countries 63, 667 metric tons valued at \$66 million. Vietnam is our largest market in ASEAN. The bulk of U.S. poultry meat exports to Vietnam consisted of frozen chicken cuts and offal.

Source: Office of the United States Trade Representative; U.S. Department of State; Association of Southeast Asian Nations; Department of Commerce, U.S. Census Bureau, Foreign Trade

Source: FAO Statistics Division, data retrieved 26 August 2009

H1N1 in Turkeys

Chile reported an outbreak of H1N1 to the World Organization for Animal Health (OIE) on August 21, 2009. The virus was detected in breeder turkeys after workers noticed a drop in egg production and a reduction in shell quality.

The affected farms were systematically monitored through the Official Health Surveillance Program, which is in place for the early detection of the diseases that affect poultry flocks. Once the drop in egg production was noted the company activated the work protocol established for these cases. The facilities were quarantined and disinfected, but affected birds were not treated or culled. Serotyping allowed exclusion of the presence of H5 and H7 viruses and allowed confirmation of the detection of A/H1N1 2009 pandemic influenza virus.

Outbreaks were reported at two locations. Both are breeding turkey operations owned by the same company. The farms are vertically integrated operations with biosecurity measures in place. Some birds had been exposed to people showing respiratory symptoms prior to drop in egg production The breeding stock was back to normal egg production levels in less than three weeks from the initial outbreak. Vaccination is not allowed in Chile. FAO's interim Chief Veterinary Officer Juan Lubroth said "once the sick birds have recovered, safe production and processing can continue. They do not pose a threat to the food chain."

This is the first time the virus has been detected outside of humans and pigs. Three countries have reported cases of H1N1 in pigs: Canada, Argentina, and Australia. The H1N1 virus was first seen in March, 2009 and has since been detected in about 180 countries. The H1N1 virus has only caused mild symptoms in turkeys and pigs.

The Center for Disease Control (CDC) lists the 2009 H1N1 influenza virus as the dominant influenza virus in circulation in the world. In a CDC Joint Briefing with NIH and FDA on 2009 H1N1 Influenza, Dr. Anthony Fauci, the Director of the National Institute of Allergy and Infectious Diseases at the National Institutes for Health (NIH) said, "It's not surprising we see this infecting turkeys because the bird, swine, human access with influenza is well-established...so the report of turkeys being affect in Chile, although it's of interest, did not raise any great concerns among us."

Source: OIE WAHID Disease Information; CDC Joint Briefing with HIH & FDA on 2009 H1N1 Influenza; Centers for Disease Control; FAO Newsroom; UN Influenza.org; news wires

U.S. Poultry Exports to ASEAN Countries, in metric tons

				,	January-D	ecember			Janua	ry-June			
	20	005	2	006	20	007	20	800	20	08	20	09	% Chng
	MT	Value	MT	Value	MT	Value	MT	Value	MT	Value	MT	Value	Value
Brunei	76	60	22.1	15	0	0	26	83	0	0	0	0	-
Cambodia	0	0	15.2	34	10	31	4	12	1.9	9	3.8	7	-22.22
Indonesia	2,520	920	782.2	656	246	170	4,266	4,717	543	519	1,811	2,472	376.3
Malaysia	2,607	2,467	1,567	1,465	2,195	2,566	2,975	3,368	1,421	1,538	2,332	2,328	51.37
Philippines	11,948	10,345	19,545	12,971	23,119	22,721	19,715	20885	7,564	7506	8,661	8,859	18.03
Singapore	15,890	18,065	16,636	15,981	19,156	23,690	31,350	42,832	10,612	13,625	10,905	14,018	2.88
Thailand	4,685	2,486	4,164	2,512	799	722	541	703	47	157	232	302	92.36
Vietnam	1,417	1,198	9,211	6,830	29,019	29,106	68,309	73,399	42,298	45,684	39,722	38,301	-16.16
Total	39.142	35.541	51.943	40.463	74.543	79.006	127.185	145.999	62.487	69.038	63.667	66.287	-3.98

Includes: Poultry: whole and cuts, fresh/chilled/frozen; Prepared: fowl, turkey, duck; Sausage: chicken, turkey

Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Week
Type
Liquid
Frozer
Dried

Total Hens

INSPECTED EGG PRODUCTS-

U.S. & CANADA IMPORT/EXPORT TRADE

U.S. I	exports to Car	iada, in Pour	108 (000) (Pre	enminary)
Endin	g Aug 22, 2009	9	Year-	To-Date
	2009	2008 /1	2009 /2	2008
	197	48	6,880	493
n	95	0	95	39
	40	0	498	406

Total 332 48 7,473 938 U.S. Imports From Canada, in Pounds (000) (Preliminary) Week Ending Aug 22, 2009 Year-To-Date

	,	••				
Type	2009	2008 /1	2009 /2	2008		
Liquid	368	325	11,096	12,814		
Frozen	0	5	215	398		
Dried	0	0	0	393		
Total	368	330	11,311	13,605		

Inspected Shell Eggs

U.S Exports to 0	Canada, I	n 30-Dozen	Cases	(Preliminary)
ant Ending Aug 00	2000		V-	or To Doto	

Week Ending	g Aug 22, 2009	2, 2009 Year-To-Date				
	2009	2008 /1	2009 /2	2008		
Jumbo	0	0	0	0		
Extra Large	1,320	1,950	44,363	40,240		
Large	2,500	1,260	93,992	46,875		
Medium	1,560	1,500	35,627	28,676		
Ungraded	16,224	9,900	203,107	235,634		
Misc	0	1,620	6,218	3,182		
Total	21,604	16,230	383,307	354,607		
/1 Comparable	a Wook to data	figures may n	at total due to re	ounding		

/1 Comparable Week, to-date figures may not total due to rounding. /2 Includes revisions to previous week(s)

Note: Year to-date totals reflect comparable time periods.

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

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

Week Ending 22-Aug-09 (Preliminary)

-	U.S.	fowl	slaughtered	domestically	,

L	ight Hens	Heavy Hens	Total Hens
	Thousai	nds	
Head	1,412	1,531	2,943
Last Week	1,301	1,763	3,064
Same week yr ago	1,401	1,875	3,276
To-date/2009*	42,827	49,629	92,456
To-date/2008*	46,498	53,580	100,078

U.S. fowl slaughtered in Canada Light Hens Heavy Hens

	Thousands		
Head	525	0	525
Last Week	441	0	441
Same week yr ago	373	4	377
To-date/2009*	10,254	19	10,273
To-date/2008*	11,176	50	11,226

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-----1,937 1,531 3,46

Head 3.468 Last Week 1.742 1.763 3.505 Same week yr ago 1,774 1,879 3,653 To-date/2009* 53,081 49,648 102,729 To-date/2008* 57.674 53.630 111,304 *Note: Year to-date totals reflect comparable time periods.

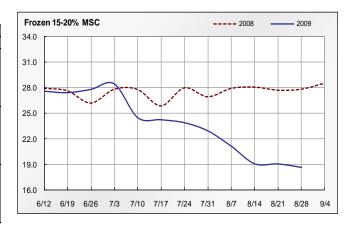
NATIONAL MECHANICALLY SEPARATED CHICKEN

(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 market tone continued unsettled, steady to barely steady on all fat contents. Supplies of fresh and frozen 15-20% were adequate to available with the balance sufficient for current requirements. With the contract season approaching, many are closely watching market developments. Raw material supplies were available. Export and domestic demand was light to moderate at best with some anticipating improvements to Mexico. Schedules were normal. Frame values were steady to barely steady ranging mostly 7-9 cents FOB.

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

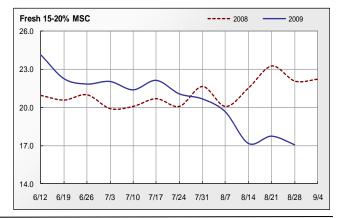
		F			Fresh	
		Frozen				
Fat Content	28-Aug-09	Last Week	Last Year	28-Aug-09	Last Week	Last Year
15% or Less						
Price Range			25.00-34.00	19.00 - 20.00	19.00 - 20.00	26.50-27.00
Wtd Avg Price			29.00	19.14	19.25	26.70
Volume Traded	-	-	320	286	163	200
Volume Exported	-		280	-	-	-
15-20%						
Price Range	17.00 - 23.00	15.00 - 23.00	24.00-31.00	14.00 - 21.00	14.50 - 22.00	18.00-27.00
Wtd Avg Price	18.63	19.03	27.84	17.04	17.72	22.08
Volume Traded	1,757	2,099	1,646	3,421	2,521	2,080
Volume Exported	1,677	1,859	1,246	898	775	667
20% or More						
Price Range	-	-	-	18.00	18.00	21.00
Wtd Avg Price			-	18.00	18.00	21.00
Volume Traded	-	-	-	42	82	80
Volume Exported	-	-	-	-	-	-



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

		Frozen		Fresh			
Fat Content	Jul 2009	Jun 2009	Jul 2008	Jul 2009	Jun 2009	Jul 2008	
15% or Less							
Wtd Avg Price	-	-	30.00	25.39	28.55	23.72	
Volume Traded	-	-	40	1,443	1,233	647	
Volume Exported	-	-		163	216	-	
15-20%							
Wtd Avg Price	24.66	28.18	27.53	21.53	23.08	20.16	
Volume Traded	8,099	6,088	5,069	15,295	12,262	12,334	
Volume Exported	7,299	5,371	4,269	4,769	4,692	2,830	
20% or More							
Wtd Avg Price	-	-	-	22.00	22.00	-	
Volume Traded	-	-	-	326	286	-	
Volume Exported	-	-	-	-	-	-	

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



NATIONAL YOUNG TURKEY PARTS, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 AUGUST 2009.

The market tone on fresh tom breast meat was steady to fully steady with the balance of white meat items mostly steady. Demand was light to moderate. Offerings were adequate. The trade sentiment on tom bulk parts was steady to fully steady, instances firm for full-cut wings and necks. Demand was light to moderate. Offerings were mixed from tight to adequate, tom full-cut wings in the best position. The market tone on thigh meat was fully steady instances firm. Demand and trading was light to moderate with most inquiry on fresh thigh meat. Offerings were adequate. Domestic: hearts 27 cents, fresh wing meat 106, fresh scapula 108, tom defatted gizzards machine defatted 88, plant grade 20#/ up breast 115 cents and fresh scapula 111 cents delivered. Export: destrapped tenders 141 cents port.

EXPORT TRADING FRIDAY, AUGUST 28, 2009 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS	PRICE RANGE 55.00-65.00	L.S.T. CODE 1/	WTD AVG PRICE 59.38	VOLUME (000) 864	WEEKLY WTD AVG PRICE 58.45	WEEKLY VOLUME (000) 1,188
WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/	78.00-80.00 27.00		79.00 27.00	216 40	76.13 27.00	816 80
THIGH MEAT - FROZEN	84.00		84.00	40	84.00	40
EXPORT TRADING THURSDAY, AUGUST 27, 2009 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM TAILS	PRICE RANGE	L.S.T. CODE 1/ W M M	WTD AVG PRICE 56.00 75.10 27.00	VOLUME (000) 324 600 40		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN			200			
EXPORT TRADING WEDNESDAY, AUGUST 26, 2009 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS	PRICE RANGE 56.00	L.S.T. CODE 1/	WTD AVG PRICE 56.00	VOLUME (000) 324		
WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M M	75.10 27.00	600 40		
EXPORT TRADING TUESDAY, AUGUST 25, 2009 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS	PRICE RANGE	L.S.T. CODE 1/ F	WTD AVG PRICE 51.82	VOLUME (000) 548		
WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M M	75.10 27.00	600 40		
EXPORT TRADING MONDAY, AUGUST 24, 2009 DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS	PRICE RANGE	L.S.T. CODE 1/ F	WTD AVG PRICE 51.82	VOLUME (000) 548		
WINGS, V-TYPE, TOM TAILS MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	73.50-76.00 27.00		75.10 27.00	600 40		

^{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.