October 09, 2012
VOL. 15 NO. 41

INTERNATIONAL EGG AND POULTRY REVIEW

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

Sub-Saharan Africa

The gross domestic product of Sub-Saharan Africa (SSA) has grown 5 to 6% in real terms during recent years. In most countries in SSA food and agriculture has grown on a per capita basis, something considered unattainable a decade ago. While food imports have increased in most SSA countries, the region relies mostly on domestic production for its food consumption.

SSA's estimated broiler meat production for 2012 is up 8% since 2008 and up 40% since 2002. However, total domestic broiler meat consumption is estimated to be up 26% since 2008 and up 91% since 2002.

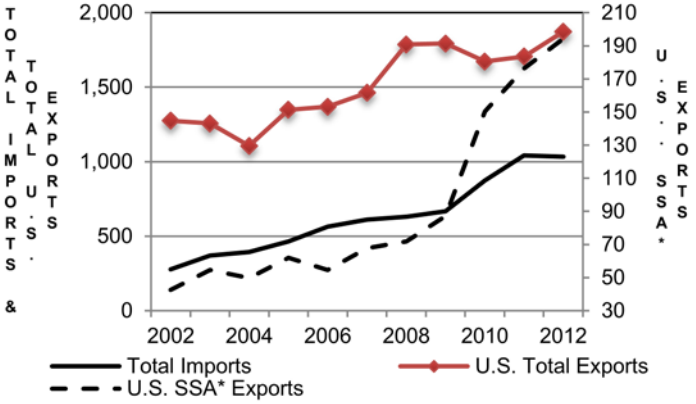
Estimated total turkey meat production has grown 14% since 2008 and 167% higher since 2002. Estimated total domestic turkey meat consumption for SSA over the last 5 years has been increasing again after dropping several years to where 2012 is estimated to be unchanged since 2008. However, total estimated domestic turkey meat consumption is still below the 2007 10 year high of 47,000 metric tons. Total domestic turkey meat consumption for 2012, even with the down turn, is estimated to be up 138% since 2002.

When comparing regions of the world for United States (U.S.) cumulative total poultry exports for the January-July 2012 time frame, SSA ranked 5th for broiler meat and for turkey meat, and 13th for egg and egg product exports.

U.S. January-July cumulative total broiler meat exports for 2012 are up 10% over 2011 and have increased 357% since 2002 over the same time frames. U.S. turkey meat cumulative total exports are up 72% over 2011 and 186% higher than 2002 for comparable January-July time frames. U.S. January-July, 2012 cumulative total egg and egg product exports are up significantly over 2011 while no exports were reported to the region in 2002 for the same time frame.

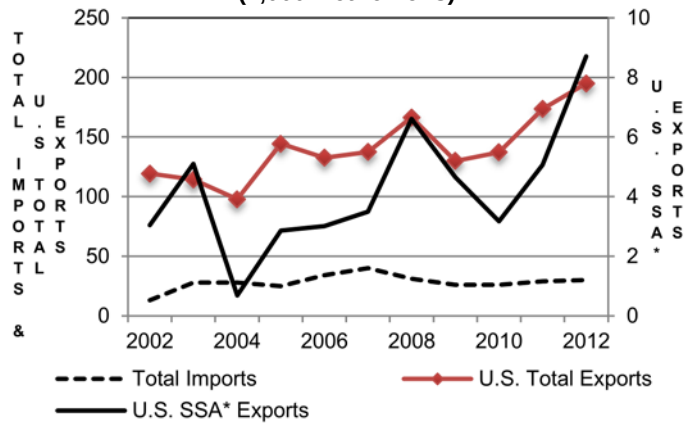
Sources: Amber Waves, September 2012, USDA, Economic Research Service; USDA, Foreign Agricultural Service, Official USDA Estimates; Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

Sub-Saharan Africa Broiler Meat
Total Imports & U.S. January-July Total Export Comparisons
(1,000 Metric Tons)



*Sub-Saharan Africa
Sources: USDA, Foreign Agricultural Service, Official USDA Estimates; Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

Sub-Saharan Africa Turkey Meat
Total Imports & U.S. January-July Total Export Comparisons
(1,000 Metric Tons)



*Sub-Saharan Africa
Sources: USDA, Foreign Agricultural Service, Official USDA Estimates; Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

Sub-Saharan Africa
Broiler & Turkey Meat Production
& Consumption Comparisons
(1,000 Metric Tons)

	2008	2009	2010	2011	2012
Broiler Meat					
Production	1,302	1,313	1,365	1,382	1,409
Consumption	1,930	1,967	2,223	2,416	2,435
Turkey Meat					
Production	7	8	8	8	8
Consumption	38	34	34	37	38

Source: USDA, Foreign Agricultural Service, Official USDA Estimates

U.S. Egg Product Exports
January-July Total Comparisons
(Metric Tons)

	2008	2009	2010	2011	2012
World Total	183,895	192,813	212,141	254,756	262,301
Sub-Saharan Africa	16	47	9	17*	119
Sub-Saharan Africa					
South Africa	16	47	9	13	100
Equatorial Guinea	0	0	0	3	19
Total Sub-Saharan Africa	**16**	**47**	**9**	**16***	**119**

*Due to rounding totals may not agree
Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

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

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

Week Ending Sep 29, 2012 Year-To-Date*

Type	2012	2011 /1	2012 /2	2011
Liquid	0	49	1,067	1,643
Frozen	0	0	0	0
Dried	40	0	179	139
Total	40	49	1,246	1,782

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

Week Ending Sep 29, 2012 Year-To-Date*

Type	2012	2011 /1	2012 /2	2011
Liquid	108	341	10,312	12,015
Frozen	22	8	997	757
Dried	0	0	0	48
Total	130	349	11,309	12,820

INSPECTED SHELL EGGS

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

Week Ending Sep 29, 2012 Year-To-Date*

	2012	2011 /1	2012 /2	2011
Jumbo	0	0	0	0
Extra Large	2,190	3,540	75,181	63,829
Large	14,070	6,208	154,226	122,584
Medium	840	810	25,320	32,041
Ungraded	14,250	3,948	128,954	129,164
Misc	0	0	1,620	1,440
Total	31,350	14,506	385,301	349,058

/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 Sep 29, 2012 (Preliminary)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	1,576	1,828	3,404
Last Week	1,507	2,046	3,553
Same week yr ago	1,377	1,557	2,934
To-date/2012*	59,861	63,645	123,506
To-date/2011*	53,247	60,280	113,527

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	203	0	203
Last Week	413	0	413
Same week yr ago	100	0	100
To-date/2012*	10,535	36	10,571
To-date/2011*	13,918	385	14,303

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	1,779	1,828	3,607
Last Week	1,920	2,046	3,966
Same week yr ago	1,477	1,557	3,034
To-date/2012*	70,396	63,681	134,077
To-date/2011*	67,165	60,665	127,830

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

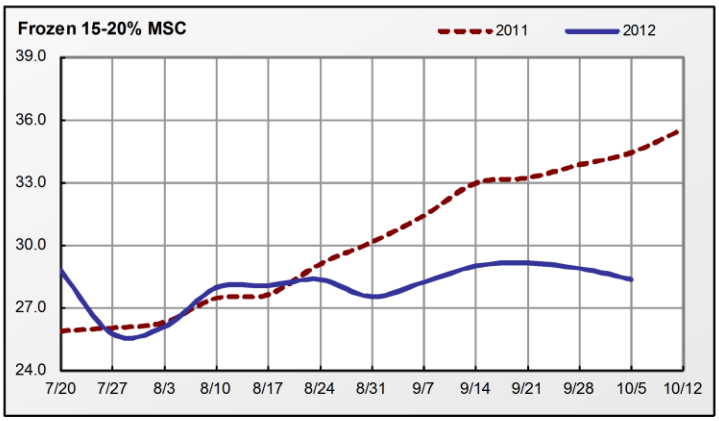
NATIONAL MECHANICALLY SEPARATED CHICKEN

(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.)

MSC prices on all fat contents trended steady. Supplies are moderate to at times heavy. Schedules are seasonally normal. Domestic and export demand is light to moderate. Demand for stews, soups, potted meats, and other hurricane provisional items is moderate to good, although it has slowed into other finished goods such as hot dogs and deli items among others, which is typical. This week the spot marketplace has slowed both domestically and into export channels, and producers reacted by selling frames and staying out front on spot sales of MSC if able. Industry as a whole maintains a close eye on production, demand, the spot marketplace, and grain markets looking for future market direction. Contract negotiations for 2013 persist with some progress to note. Market activity is slow. Supplies of raw materials are moderate to heavy. Spot frames traded between 11-14 cents FOB, mostly 11-12 FOB.

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

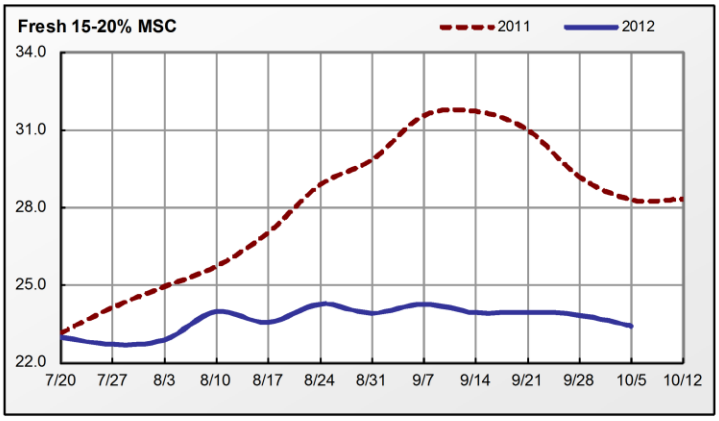
	Frozen			Fresh		
Fat Content	5-Oct-12	Last Week	Last Year	5-Oct-12	Last Week	Last Year
15% or Less						
Price Range			-	24.00 - 25.00	24.00 - 26.00	32.00
Wtd Avg Price			-	24.57	25.56	32.00
Volume Traded	-	-	-	143	184	82
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	27.00 - 31.00	26.00 - 31.00	32.00-38.00	18.00 - 26.00	19.00 - 26.00	24.00-33.00
Wtd Avg Price	28.37	28.90	34.43	23.42	23.84	28.30
Volume Traded	1,965	2,250	2,065	4,610	4,672	3,600
Volume Exported	1,325	2,090	1,745	326	408	408
20% or More						
Price Range	-	-	-	22.00	22.00	-
Wtd Avg Price			-	22.00	22.00	-
Volume Traded	-	-	-	82	82	-
Volume Exported	-	-	-	-	-	-



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

	Frozen			Fresh		
Fat Content	Sep 2012	Aug 2012	Sep 2011	Sep 2012	Aug 2012	Sep 2011
15% or Less						
Wtd Avg Price	30.00	30.00	-	25.50	25.65	32.06
Volume Traded	80	40	-	653	877	839
Volume Exported	-	-	-	-	-	-
15-20%						
Wtd Avg Price	28.84	27.43	32.48	24.00	23.70	30.69
Volume Traded	8,600	11,085	8,432	17,085	21,571	17,023
Volume Exported	8,080	10,205	7,872	2,203	1,468	4,406
20% or More						
Wtd Avg Price	-	-	-	22.29	22.20	-
Volume Traded	-	-	-	286	408	-
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 05 OCTOBER 2012.

The market on bulk parts was steady. Demand and offerings was light to moderate. The market on tom breast meat was steady. Demand was light to moderate. Offerings light. Thigh meat market was steady to firm. Demand was light to moderate. Offerings light. Mechanically separated turkey market was steady. Demand and offerings was light to moderate. Trading was slow. For domestic: frozen tails 51 cents, frozen machine defatted gizzards 91 cents, frozen grade A breast non basted 8-10 lbs. 155-157 cents, 12-14 lbs. 165-167 cents, 14-16 lbs. 167-170 cents, 16-18 lbs. 170 cents and 18-20 lbs. 175 cents delivered. For export: fresh tom drums 53-55 cents delivered to border.

EXPORT TRADING

FRIDAY, OCTOBER 05, 2012	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		M	68.95	148	68.95	148
WINGS FULL-CUT - TOMS		W	44.40	540	44.40	540
WINGS, V-TYPE, TOM		M	95.00	270	95.00	270
TAILS						
MECHANICALLY SEPARATED 2/						
THIGH MEAT - FROZEN		W	118.00	108	118.00	108

THURSDAY, OCTOBER 04, 2012	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	68.95	148
WINGS FULL-CUT - TOMS		W	44.40	540
WINGS, V-TYPE, TOM		M	95.00	270
TAILS				
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN		W	118.00	108

WEDNESDAY, OCTOBER 03, 2012	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	68.95	148
WINGS FULL-CUT - TOMS	44.00-46.00		44.40	540
WINGS, V-TYPE, TOM		M	95.00	270
TAILS				
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN	118.00		118.00	108

TUESDAY, OCTOBER 02, 2012	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	68.95	148
WINGS FULL-CUT - TOMS		R	45.91	594
WINGS, V-TYPE, TOM		M	95.00	270
TAILS				
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN		R	115.00	54

MONDAY, OCTOBER 01, 2012	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	58.00-73.00		68.95	148
WINGS FULL-CUT - TOMS		R	45.91	594
WINGS, V-TYPE, TOM	95.00		95.00	270
TAILS				
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN		R	115.00	54

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):
M=MONDAY T=TUESDAY W=WEDNESDAY R-THURSDAY F=FRIDAY
2/ 15-20% fat with skin added.