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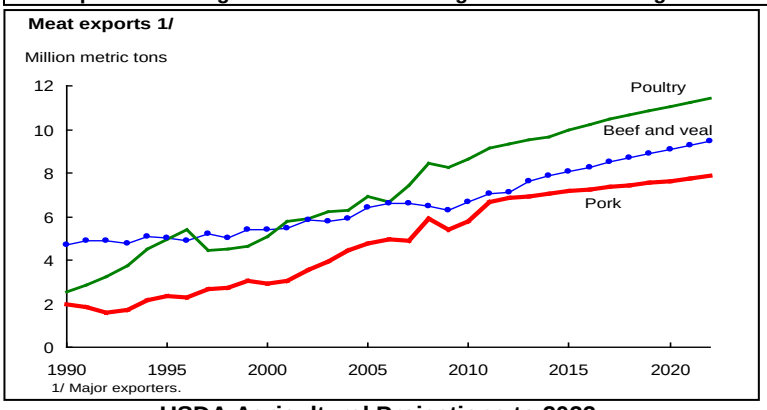
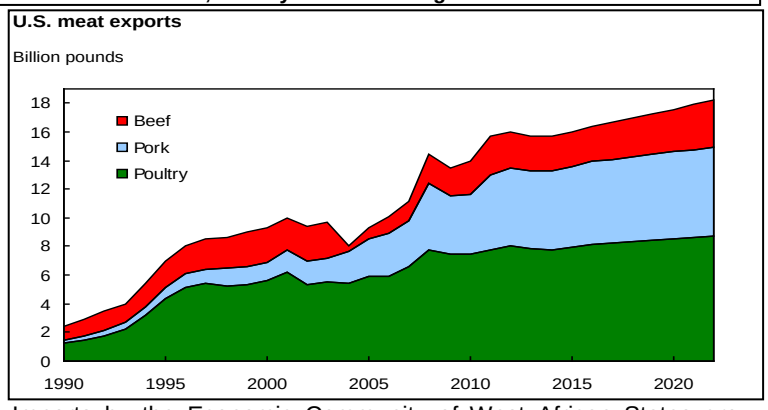
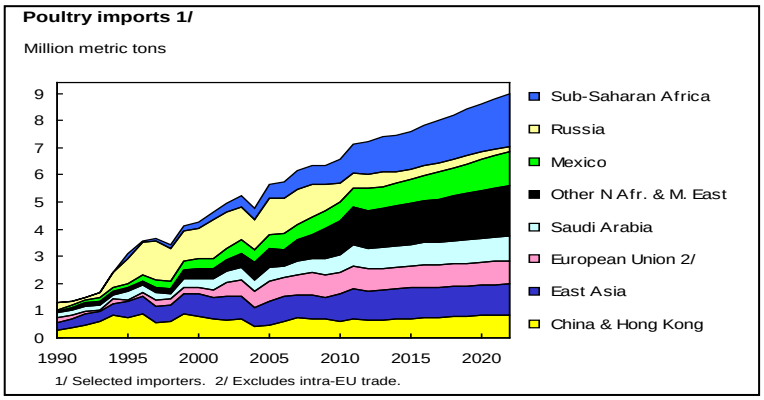




USDA Agricultural Projections to 2022

The projected growth rates of exports from major exporters of beef, pork, and poultry meat are 2.4%, 1.4%, and 2.0% per year respectively. During this period, exports rise 1.8 million metric tons (MMT) for beef, 0.9 MMT for pork, and 1.9 MMT for poultry. Brazil is expected to continue to be the largest exporter of poultry products due to a combination of competitive production costs and export prices.

Poultry meat imports by major importers are projected to increase by 1.6 MMT (21%) during the projections period, reaching 9 MMT by 2022. Strong import growth is projected for much of the world except,



most notably, for Russia (where policies constrain imports), and Japan.

Poultry imports by Africa and the Middle East currently account for 45% of imports by the major importers. Income and population growth boosts demand in the projections. In addition, ongoing animal-disease concerns in a number of countries are expected to slow growth in production and to increase demand for imports. As a result, the region's imports grow more than the rest of the world combined and by 2022 account for 52% of world imports. The Middle East accounts for more than half of the region's projected increase in imports.

Imports by the Economic Community of West African States grow much more rapidly in percentage terms, but from a small base.

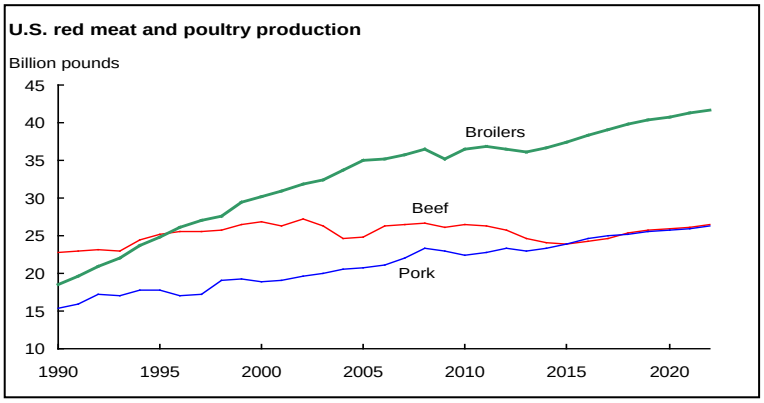
Rising consumer incomes increase poultry demand and imports in Mexico and in the Central America and Caribbean region. Poultry products remain less expensive than beef or pork, further stimulating demand. Mexico's domestic poultry production continues to increase during the projection period, but rises at a slower rate than consumption, with the result that imports rise by 0.41 MMT (50%).

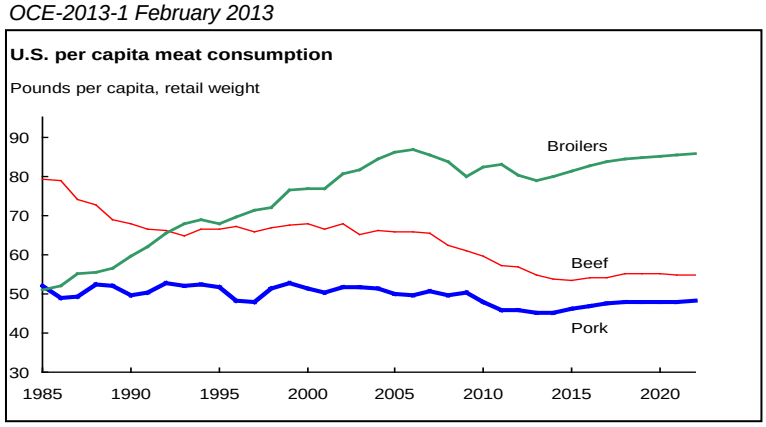
Russia's poultry imports are projected to decline steadily. The projections assume that Russian policies will limit poultry imports to stimulate domestic production. High poultry prices and slower income growth inhibit growth in per capita poultry consumption. China's rising consumption of poultry meat is met by expanding domestic production. The country's growth in poultry exports slightly exceeds the increase in imports.

Fully cooked products are projected to account for most poultry exports from China and Thailand. With higher unit costs most of these products are marketed to higher income countries in Asia, Europe, and the Middle East. In addition, Thailand's exports to the EU are expected to rise because trade to that market in uncooked chicken is been reopened.

Global per capita meat consumption continues to increase with poultry consumption rising faster than pork or beef consumption. Growth in world meat consumption is projected to increase about 1.8% per year during 2013-2022 and meat shipments from major exporters rise nearly 2% per year.

After declining in 2012 and 2013, US poultry production rises through the end of the projection period, but at lower rates than in the 1980s and 1990s. Production growth is expected to come from both higher bird numbers and higher average weights at slaughter. Increased demand is expected to strengthen broiler prices, although poultry will face competition from increasing red meat production from 2015 forward. *Source: USDA Agricultural Projections to 2022, Office of the Chief Economist, World Agriculture Outlook Board, Long-term Projections Report OCE-2013-1 February 2013*





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

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

Week Ending Feb 16, 2013 Year-To-Date*

Type	2013	2012 /1	2013 /2	2012
Liquid	0	0	337	151
Frozen	0	0	0	0
Dried	0	0	3	0
Total	0	0	340	151

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

Week Ending Feb 16, 2013 Year-To-Date*

Type	2013	2012 /1	2013 /2	2012
Liquid	288	400	1,342	2,186
Frozen	19	10	229	214
Dried	0	0	4	0
Total	307	410	1,575	2,400

INSPECTED SHELL EGGS

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

Week Ending Feb 16, 2013 Year-To-Date*

	2013	2012 /1	2013 /2	2012
Jumbo	0	0	0	0
Extra Large	3,290	570	6,770	5,250
Large	3,640	630	6,120	2,196
Medium	1,590	1,560	3,333	3,300
Ungraded	1,170	1,344	8,699	7,806
Misc	0	0	0	0
Total	9,690	4,104	24,922	18,552

/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 Feb 16, 2013 (Preliminary)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	1,310	1,433	2,743
Last Week	1,451	1,439	2,890
Same week yr ago	1,574	1,615	3,189
To-date/2013*	11,164	10,309	21,473
To-date/2012*	10,890	10,914	21,804

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	200	0	200
Last Week	361	0	361
Same week yr ago	0	0	0
To-date/2013*	2,175	0	2,175
To-date/2012*	1,880	36	1,916

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	1,510	1,433	2,943
Last Week	1,812	1,439	3,251
Same week yr ago	1,574	1,615	3,189
To-date/2013*	13,339	10,309	23,648
To-date/2012*	12,770	10,950	23,720

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

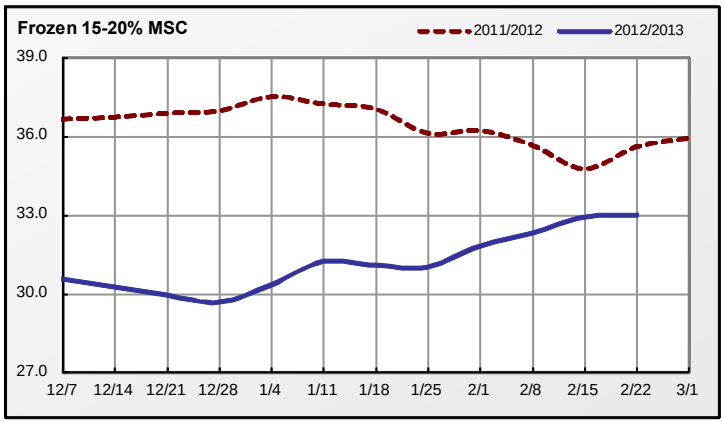
NATIONAL MECHANICALLY SEPARATED CHICKEN

(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.)

Prices for MSC are steady to firm on all fat contents with Fresh 15-20% MSC in the best position. Supplies are light to moderate. Schedules are normal to instances reduced due to a few disruptions related to severe weather across the country. Demand is mixed ranging light to instances good into domestic and export channels. Industry continues to keep a cautious and traditional attitude during this Lenten season, closely monitoring the spot marketplace. Sellers remain out front with sales of MSC. Market activity is moderate to active. Supplies of raw materials are light and sought after. Frames are firm trading mostly between 14-15 cents FOB.

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

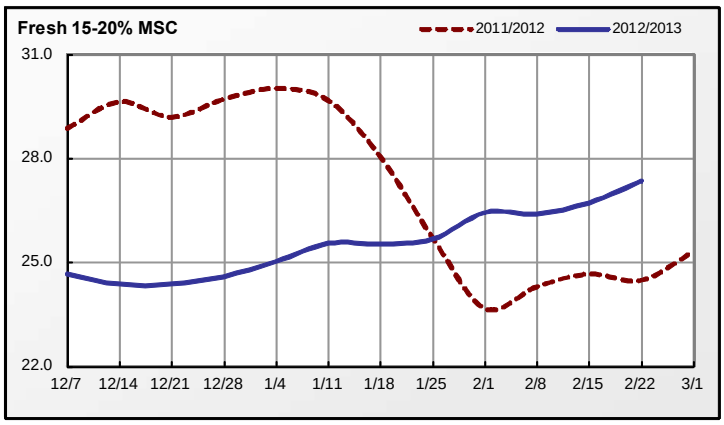
	Frozen			Fresh		
Fat Content	22-Feb-13	Last Week	Last Year	22-Feb-13	Last Week	Last Year
15% or Less						
Price Range	30.00		-	26.00 - 28.00	26.00 - 28.00	26.00-27.00
Wtd Avg Price	30.00		-	26.80	27.33	26.67
Volume Traded	40	-	-	102	184	122
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	31.00 - 35.00	31.00 - 35.00	30.00-38.00	24.00 - 31.00	24.00 - 29.00	20.00-30.00
Wtd Avg Price	32.99	32.93	35.60	27.35	26.72	24.48
Volume Traded	1,875	1,617	1,460	3,815	4,488	4,906
Volume Exported	1,675	1,417	1,340	775	571	1,020
20% or More						
Price Range	-	-	-	22.00	22.00	22.50
Wtd Avg Price	-	-	-	22.00	22.00	22.50
Volume Traded	-	-	-	41	82	41
Volume Exported	-	-	-	-	-	-



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

	Frozen			Fresh		
Fat Content	Jan 2013	Dec 2012	Jan 2012	Jan 2013	Dec 2012	Jan 2012
15% or Less						
Wtd Avg Price	30.00	30.00	-	25.13	25.11	31.81
Volume Traded	80	40	-	653	449	734
Volume Exported	-	-	-	-	-	-
15-20%						
Wtd Avg Price	30.97	30.20	37.00	25.48	24.50	28.51
Volume Traded	4,923	4,730	6,795	17,411	14,667	14,390
Volume Exported	4,563	4,370	6,195	5,834	1,836	1,306
20% or More						
Wtd Avg Price	-	-	-	20.00	21.43	22.36
Volume Traded	-	-	-	204	286	286
Volume Exported	-	-	-	-	-	-

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



Source: USDA AMS Livestock, Poultry & Grain Market News (www.ams.usda.gov/lpsmarketnewspage)

NATIONAL YOUNG TURKEY PARTS

INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 22 FEBRUARY 2013.

The market on bulk parts was steady, with tom full cut wings steady, instances firm. Demand and offerings was light to moderate. The market on tom breast meat and tenderloins continues weak. Demand was light. Offerings moderate to heavy. The balance of white meat was steady. Demand and offerings was light to moderate. Thigh meat market was weak. Demand was light. Offerings moderate. Trading was slow to moderate. For domestic: fresh tom full cut wings 42 cents, fresh tom neck 43 cents, fresh tails 51 cents, fresh scapula 110-114.5 cents, frozen livers 25 cents, frozen tails 53 cents and frozen hearts 37 cents delivered. For export: fresh tom drums 56 cents, fresh thigh meat 121-128 cents and frozen tom breast meat 176 cents delivered to port or Border.

EXPORT TRADING

FRIDAY, FEBRUARY 22, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		R	62.00	540	62.47	634
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	83.00-89.00		86.55	780	86.61	888
TAILS	60.00		60.00	40	60.00	40
MECHANICALLY SEPARATED 2/	30.00		30.00	14	34.44	54
THIGH MEAT - FROZEN	115.00-125.0		117.81	338	120.56	888

THURSDAY, FEBRUARY 21, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	62.00		62.00	540
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	87.00		87.00	108
TAILS		R	53.25	120
MECHANICALLY SEPARATED 2/		T	36.00	40
THIGH MEAT - FROZEN		T	122.25	550

WEDNESDAY, FEBRUARY 20, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	65.15	94
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	53.25	120
MECHANICALLY SEPARATED 2/		T	36.00	40
THIGH MEAT - FROZEN		T	122.25	550

TUESDAY, FEBRUARY 19, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	64.00-66.00		65.15	94
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	53.25	120
MECHANICALLY SEPARATED 2/	36.00		36.00	40
THIGH MEAT - FROZEN	114.00-133.00		122.25	550

MONDAY, FEBRUARY 18, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	No Report Released Due to President's Day Holiday			
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN				

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.