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Japan

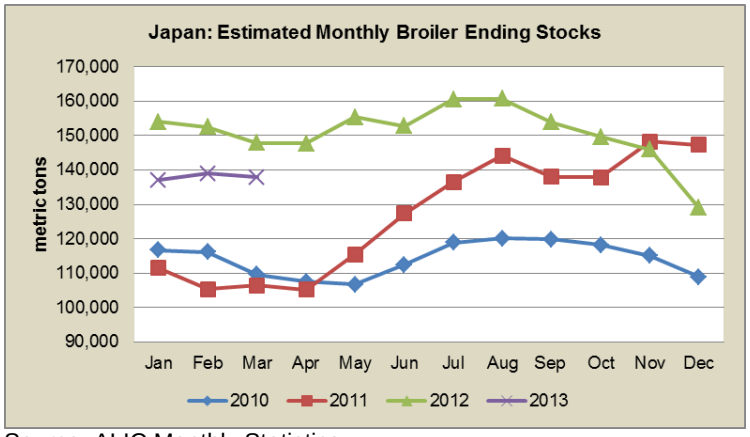
It has been two years since the outbreaks of highly pathogenic avian Influenza (HPAI) in early 2011 and the Great East Japan Earthquake and tsunami of March 2011. Broiler meat production recovered in 2012, increasing 6.5% over 2011. This year broiler meat production is expected to decline slightly compared to the previous year. Broiler meat imports were strong in 2011 due to shortages of domestic broiler production; imports fell 2.1% in 2012 and are expected to drop an additional 1.8% in 2013 compared to 2012.

Japan: Broiler Production and Imports* in Calendar Years
Thousand Metric Tons

	2008	2009	2010	2011	2012	2013
Production	1,255	1,283	1,295	1,251	1,332	1,330
Imports	737	645	788	895	876	860

*Includes prepared meat
Source: Foreign Agricultural Service, Official USDA Estimates

Estimated broiler stocks grew throughout 2011, exceeding 2010 levels for every month starting in May. Broiler stocks continued to be above year ago levels until November 2012, when broiler stocks fell to 145,932 MT. In 2013 broiler stocks have been lower compared to 2012, but still higher than 2010 and 2011.



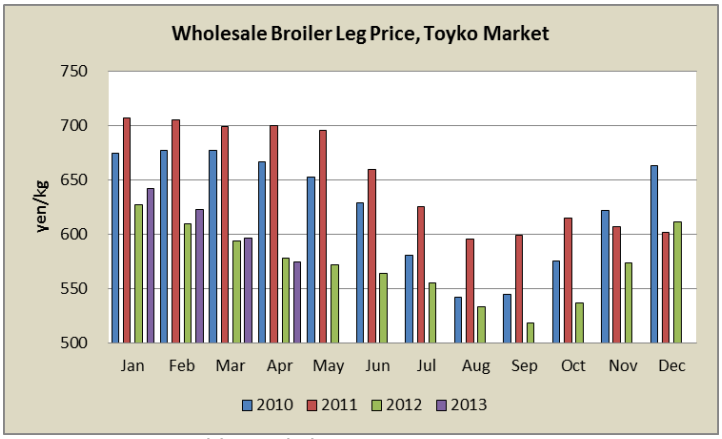
Source: ALIC Monthly Statistics

Broiler Meat Supply in Fiscal Years (April – March)

	Beginning		Production		Imports	
	Tons	Change	Tons	Change	Tons	Change
2008	112,518	-4%	1,375,258	1%	419,964	16%
2009	154,195	37%	1,398,635	2%	342,958	-18%
2010	109,643	-19%	1,386,301	-1%	431,195	26%
2011	106,385	-3%	1,398,337	1%	475,334	10%
2012	147,844	39%	1,460,040	4%	422,922	-11%

Source: ALIC Monthly Statistics
Sources: MAFF, "Meat Marketing Statistics", Ministry of Finance," Japan Exports and Imports"
Notes: Bone in cuts equivalent. Figures for stocks and production (2010～) are estimated by ALIC.

As ending stocks rose, the Tokyo wholesale price for legs fell, resulting in high priced inventories. The wholesale price of broiler legs in the Tokyo market was 707 yen/kg in January 2011, up 5% from 674 yen/kg in January 2010. By January 2012 prices were down 11% from the same month a year earlier, and in January 2013 prices were only 642 yen/kg.



Source: ALIC Monthly Statistics

Brazil is the major supplier of frozen poultry meat, accounting for 90% of raw poultry imports in 2012. The United States had a 7% share of imports. China and Thailand are the major suppliers of processed poultry meat, accounting for 41% and 34% respectively.

Japan Poultry Meat Imports HS 0207, in metric tons

	2010	2011	2012	2012*	2013*
Brazil	380,615	413,905	388,376	97,623	99,027
USA	35,059	46,707	29,965	6,503	4,137
Philippines	3,988	6,869	5,381	1,396	824
France	1,513	1,707	1,653	230	271
Hungary	754	2,244	1,537	102	227
Others	2,615	6,026	3,305	1,207	354
Total	424,543	477,457	430,217	107,060	104,841

*Jan-Mar
Source: Ministry of Finance Japan, Trade Statistics of Japan

Japan Poultry Meat Imports HS 1601-1602, in metric tons

	2010	2011	2012	2012*	2013*
China	235,538	273,477	289,051	63,981	58,893
Thailand	203,107	218,554	239,524	49,910	56,529
USA	112,900	119,153	127,290	32,559	31,558
Brazil	6,366	6,533	6,309	1,422	1,325
Others	39,802	39,885	45,394	10,391	11,173
Total	597,714	657,601	707,568	158,262	159,477

*Jan-Mar
Source: Ministry of Finance Japan, Trade Statistics of Japan

Source: USDA FAS GAIN Reports JA 1007;USDA AMS Market News International Egg and Poultry Review, May 3, 2011

Japan's Livestock and Poultry Population (Unit: 1,000 heads)

	2000	2006	2007	2008	2009	2010	2011	2012	2013*	%2013/00
Dairy cows	1,764	1,635	1,592	1,533	1,500	1,484	1,467	1,449	1,400	79.40%
Beef cattle	2,824	2,755	2,806	2,890	2,923	2,892	2,763	2,723	2,700	95.60%
Swine	9,806	9,620	9,759	9,745	9,899	9,750*	9,768	9,735	9,720	99.10%
Layers	140,365	136,894	142,765	142,523	139,910	139,200*	137,352	135,477	135,000	96.20%
Broilers	108,410	103,687	105,287	102,987	107,141	106,400*	103,800*	106,900*	106,000	97.80%

Source: MAFF (as of February each year) *FAS/Tokyo forecast

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

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

Week Ending May 18, 2013 Year-To-Date*

Type	2013	2012 /1	2013 /2	2012
Liquid	0	48	1,386	527
Frozen	0	0	40	0
Dried	0	0	59	10
Total	0	48	1,485	537

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

Week Ending May 18, 2013 Year-To-Date*

Type	2013	2012 /1	2013 /2	2012
Liquid	149	293	4,860	6,512
Frozen	78	50	631	433
Dried	0	0	4	0
Total	227	343	5,495	6,945

INSPECTED SHELL EGGS

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

Week Ending May 18, 2013 Year-To-Date*

	2013	2012 /1	2013 /2	2012
Jumbo	0	0	0	0
Extra Large	4,140	1,860	43,400	34,020
Large	3,880	5,890	83,000	75,322
Medium	510	810	13,593	13,713
Ungraded	7,008	3,600	89,557	55,368
Misc	0	0	0	1,620
Total	15,538	12,160	229,550	180,043

/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 May 18, 2013 (Preliminary)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	1,735	1,473	3,208
Last Week	1,838	1,594	3,432
Same week yr ago	1,705	1,674	3,379
To-date/2013*	33,255	28,471	61,726
To-date/2012*	33,579	29,672	63,251

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
	----------Thousands----------		
Head	562	0	562
Last Week	428	0	428
Same week yr ago	418	0	418
To-date/2013*	7,743	0	7,743
To-date/2012*	6,332	36	6,368

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	2,297	1,473	3,770
Last Week	2,266	1,594	3,860
Same week yr ago	2,123	1,674	3,797
To-date/2013*	40,998	28,471	69,469
To-date/2012*	39,911	29,708	69,619

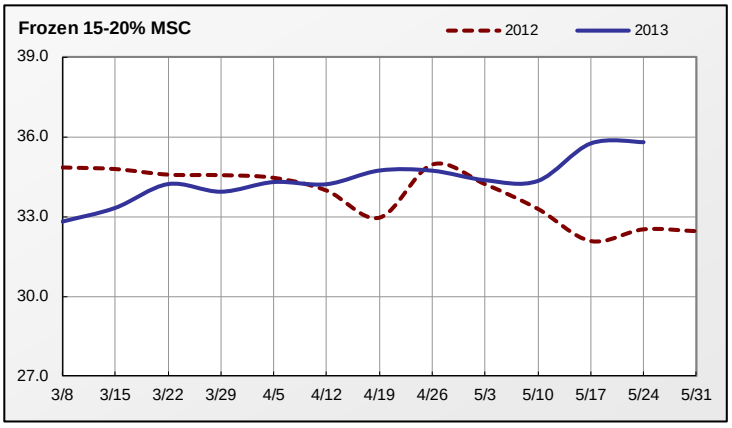
*Note: Year to-date totals reflect comparable time periods.

NATIONAL MECHANICALLY SEPARATED CHICKEN (F.O.B. Shipper Dock or equivalent; negotiated prices in trucklot and less-than-trucklot volumes reported in thousand pound quantities, cents/pound; delivery within 2 weeks.)

Prices are trending steady to instances firm on all fat contents of MSC. Supplies are light to moderate. Schedules are normal. Demand is moderate into both domestic and export channels. Industry continues to watch the marketplace closely for any new developments or changes that might offer any indication in market direction. Otherwise many are making last minute preparations entering the Memorial Day holiday weekend. Market activity is moderate to active. Supplies of raw materials are light to moderate. Frames are steady, trading between 14-16.5 cents FOB, mostly 15-16 cents FOB.

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

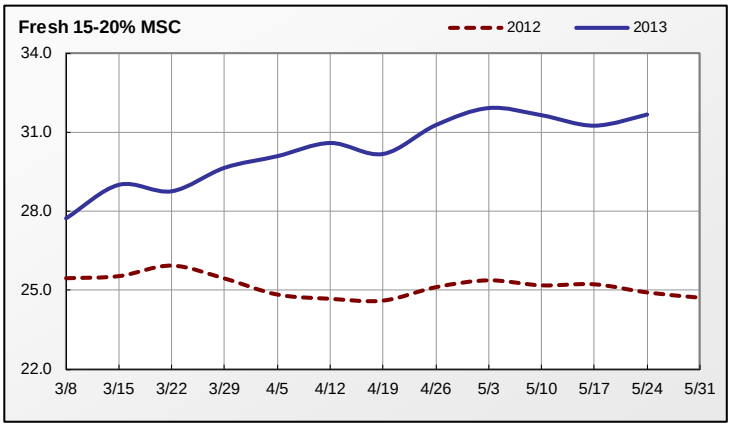
	Frozen			Fresh		
Fat Content	24-May-13	Last Week	Last Year	24-May-13	Last Week	Last Year
15% or Less						
Price Range			-	32.00 - 33.00	32.00 - 33.00	26.00-27.00
Wtd Avg Price			-	32.57	32.67	26.75
Volume Traded	-	-	-	143	122	163
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	33.00 - 37.00	34.00 - 38.00	29.00-34.00	29.00 - 36.00	28.00 - 36.00	20.00-28.00
Wtd Avg Price	35.80	35.75	32.52	31.68	31.26	24.92
Volume Traded	1,240	1,260	1,075	4,279	3,713	3,917
Volume Exported	1,000	1,260	955	938	612	612
20% or More						
Price Range	-	-	-	22.50	22.50	22.00
Wtd Avg Price	-	-	-	22.50	22.50	22.00
Volume Traded	-	-	-	82	82	82
Volume Exported	-	-	-	-	-	-



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

	Frozen			Fresh		
Fat Content	Apr 2013	Mar 2013	Apr 2012	Apr 2013	Mar 2013	Apr 2012
15% or Less						
Wtd Avg Price	32.00	31.00	-	30.29	29.16	25.39
Volume Traded	40	80	-	775	561	367
Volume Exported	-	-	-	-	-	-
15-20%						
Wtd Avg Price	34.54	33.40	33.93	30.55	28.52	24.83
Volume Traded	8,831	6,348	6,532	20,114	17,485	14,195
Volume Exported	8,191	5,700	5,292	1,428	1,958	1,997
20% or More						
Wtd Avg Price	-	-	-	22.14	22.00	22.50
Volume Traded	-	-	-	286	367	245
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 24 MAY 2013.

The market on breast trim is firm, scapula steady to firm, balance of white meat items steady. The market on tom drums is steady to firm, balance of tom bulk parts steady. Demand on mostly items light to good, mostly moderate and slowing for the holiday weekend. Offerings overall mixed varying by seller. For domestic: livers 23 fob pet food; tails 54-56; frozen non-basted Grade A bone-in breasts - 8-10 lb. 132, 12-14 lb. 137, 14-16 lb. 137-140, 16-18 lbs. 140; Grade A basted - 12-14 lb. 125, 14-16 lb. and 18-20 lb. 130; basted plant grade bone-in breasts 16-18 lbs. 130; fresh scapula 124 cents delivered. For export: fresh tom drums 63-64, hen drums 60, tom hand defatted gizzards 94, frozen whole tenderloins 140 and destrapped 146, frozen tom breast meat 158 cents delivered.

EXPORT TRADING

FRIDAY, MAY 24, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	71.00		71.00	135	69.03	1,151
WINGS FULL-CUT - TOMS	42.00-43.00		42.64	336	42.24	444
WINGS, V-TYPE, TOM	75.00		75.00	324	76.86	607
TAILS		F	55.00	40		
MECHANICALLY SEPARATED 2/	40.00		40.00	40	40.00	40
THIGH MEAT - FROZEN	102.00-110.0		105.51	564	106.13	1,220
*Wings Full-Cut-Toms, May 17, 2013**	*44.00**		*44.00**	*240*	*44.71**	*456*

**Revised to reflect corrections*

THURSDAY, MAY 23, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	69.00		69.00	648
WINGS FULL-CUT - TOMS		W	41.00	108
WINGS, V-TYPE, TOM		M	79.00	283
TAILS		F	55.00	40
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	108.00		108.00	54

WEDNESDAY, MAY 22, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	70.00		70.00	108
WINGS FULL-CUT - TOMS	41.00		41.00	108
WINGS, V-TYPE, TOM		M	79.00	283
TAILS		F	55.00	40
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M	106.54	602

TUESDAY, MAY 21, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	67.69	260
WINGS FULL-CUT - TOMS		F	34.00	240
WINGS, V-TYPE, TOM		M	79.00	283
TAILS		F	55.00	40
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M	106.54	602

MONDAY, MAY 20, 2013	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	66.00-68.00		67.69	260
WINGS FULL-CUT - TOMS		F	34.00	240
WINGS, V-TYPE, TOM	79.00		79.00	283
TAILS		F	55.00	40
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	103.00-108.00		106.54	602

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.