

INTERNATIONAL EGG AND POULTRY REVIEW



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

World Turkey Meat Production and Trade

The U.S. is the largest turkey meat producer in the world. U.S. turkey meat production grew from 2,464 thousand metric tons (MT) in 2005 to an estimated 2,567 thousand MT in 2009 and are forecast to reach 2,607 thousand MT in 2010. In 2009 the U.S. has 51% of the world's turkey production and the EU-27 has 36%.

Turkey Meat Production in 1,000 MT (ready to cook equivalent)

	2005	2006	2007	2008	2009	2010
U.S.	2,464	2,543	2,664	2,796	2,567	2,607
EU-27	1,919	1,858	1,790	1,830	1,820	1,815
Brazil	360	353	458	438	437	480
Canada	155	163	169	180	170	180
Russia	17	19	25	35	40	45
Mexico	14	14	15	15	15	15
South Africa	5	5	7	7	8	8
China	4	4	5	5	5	6
Others	4	4	4	nr	nr	nr
World Total	4,942	4,963	5,137	5,306	5,062	5,156

From 2008, Taiwan is excluded. 'nr' = 'no data'

Data for 2009 is preliminary. Data for 2010 is forecast.

The U.S. is also the top turkey meat consumer, followed by Canada, the EU-27, Mexico, Brazil and Russia.

Turkey Meat Consumption, kilograms per person

	2003	2004	2005	2006	2007	2008(p)	2009(f)
U.S.	7.9	7.8	7.6	7.7	8.0	8.2	8.0
Brazil	0.9	1.0	1.1	1.0	1.4	1.5	1.6
Canada	4.3	4.3	4.4	4.4	4.5	4.7	4.7
EU-27	3.7	3.7	3.6	3.5	3.3	3.3	3.3
Mexico	1.6	1.5	1.9	1.9	2.0	2.0	2.0
Russia	0.9	0.8	0.9	0.8	0.7	0.8	0.9

The top turkey meat exporters are the U.S., Brazil, the EU-27 and Canada. In 2009 the U.S. has a 44% market share, while Brazil has 31%. Brazil's market share has steadily increased and in 2010 Brazil's share is expect to reach 32%. Total world exports are projected to fall 19% in 2009. In 2008 the EU-27 became a net importer as imports outweighed exports.

Turkey Meat Exports in 1,000 MT (ready to cook equivalent)

	2005	2006	2007	2008	2009	2010
U.S.	258	248	248	307	235	247
Brazil	161	156	177	204	163	175
EU-27	159	130	124	120	110	105
Canada	24	27	27	25	24	24
Others	2	3	4	0	0	0
Total	604	564	580	656	532	551

Turkey Meat Imports in 1,000 MT (ready to cook equivalent)

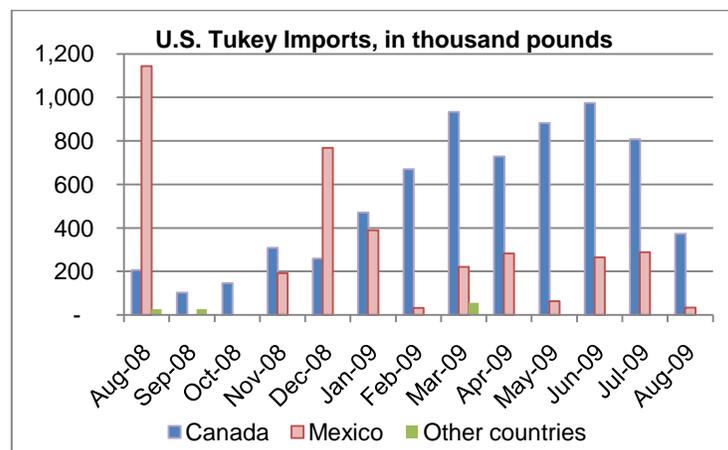
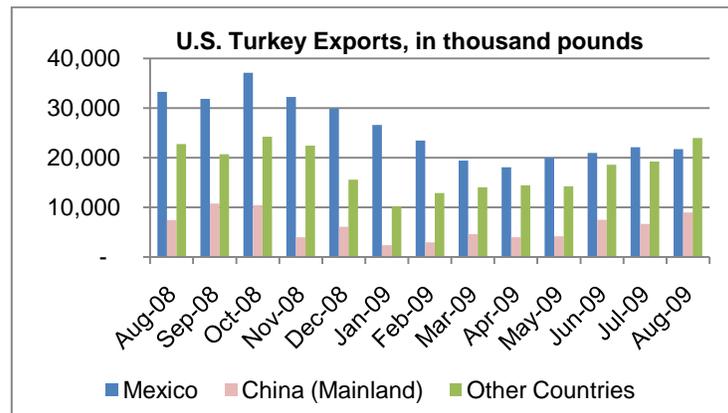
	2005	2006	2007	2008	2009	2010
U.S.	3	5	4	4	6	5
Mexico	185	189	202	204	170	190
EU-27	128	113	103	125	120	120
Russia	107	91	75	68	45	50
South Africa	25	34	40	31	25	30
China	12	17	30	45	25	25
Canada	12	9	9	9	9	9
Others	18	19	19	0	0	0
Total	490	477	482	486	400	429

Source: Foreign Agricultural Service/USDA

U.S. Turkey Imports and Exports, in 1,000 pounds

	2005	2006	2007	2008	January - August 2008	2009
Imports						
Canada	6,660	10,299	10,240	6,080	5,261	5,841
Mexico	4,849	7,116	9,768	9,047	8,087	1,577
Other Countries	1,068	60	168	92	65	56
Total	12,577	17,475	20,175	15,219	13,413	7,474
Exports						
Mexico	353,759	310,915	301,541	358,311	227,198	172,375
China						
(Mainland)	21,459	35,430	48,214	85,623	54,350	41,110
Russia	20,009	25,240	30,714	26,056	21,386	10,878
Canada	27,620	21,926	23,710	22,271	13,355	10,235
China (Taiwan)	19,770	17,990	11,878	18,030	14,889	8,869
Hong Kong	11,560	18,203	14,550	19,372	12,704	13,198
Panama	10,328	13,322	11,776	9,183	4,939	4,816
DR*	7,634	6,192	7,494	13,625	8,021	10,360
Other Countries	97,411	97,390	96,645	123,753	74,029	69,175
Total	569,550	546,608	546,522	676,222	430,872	341,017

Source: ERS calculations using data from U.S. Department of Commerce, Bureau of the Census. Date run: 10/9/2009 2:22:30 PM



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

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

Type	Year-To-Date			
	2009	2008 /1	2009 /2	2008
Liquid	439	102	10,176	1,033
Frozen	0	0	95	39
Dried	44	0	680	444
Total	483	102	10,951	1,516

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

Type	Year-To-Date			
	2009	2008 /1	2009 /2	2008
Liquid	282	369	14,188	15,963
Frozen	4	42	261	523
Dried	0	37	0	627
Total	286	448	14,449	17,113

Inspected Shell Eggs

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

	Year-To-Date			
	2009	2008 /1	2009 /2	2008
Jumbo	0	0	0	0
Extra Large	3,420	3,090	66,001	62,394
Large	5,810	2,150	142,069	78,510
Medium	840	1,770	43,237	40,551
Ungraded	15,876	15,300	337,351	372,666
Misc	0	716	9,770	6,690
Total	25,946	23,026	598,428	560,811

/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 24-Oct-09 (Preliminary)

U.S. fowl slaughtered domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,128	1,531	2,659
Last Week	1,120	1,564	2,684
Same week yr ago	1,317	1,626	2,943
To-date/2009*	53,987	63,496	117,483
To-date/2008*	57,798	69,214	127,012

U.S. fowl slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	185	0	185
Last Week	188	0	188
Same week yr ago	171	12	183
To-date/2009*	12,999	43	13,042
To-date/2008*	13,553	62	13,615

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	1,313	1,531	2,844
Last Week	1,308	1,564	2,872
Same week yr ago	1,488	1,638	3,126
To-date/2009*	66,986	63,539	130,525
To-date/2008*	71,351	69,276	140,627

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

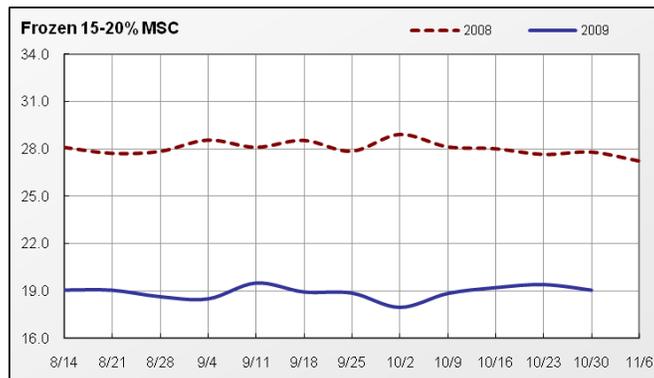
NATIONAL MECHANICALLY SEPARATED CHICKEN

(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 was generally steady on all fat contents. Supplies of fresh and frozen 15-20% were at least adequate for trade requirements. The remainder of fat contents was at least sufficient with dealers closely monitoring market conditions as contract season begins. Supplies of raw material ranged adequate to available. Export and domestic demand was light to moderate. Schedules were seasonally normal. Frame values were steady, mostly 7-9 cents FOB.

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

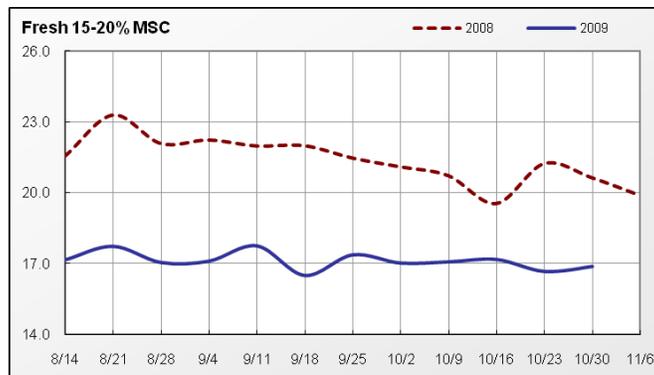
Fat Content	Frozen			Fresh		
	30-Oct-09	Last Week	Last Year	30-Oct-09	Last Week	Last Year
15% or Less						
Price Range			-	18.00 - 19.00	18.00 - 19.00	23.00-26.00
Wtd Avg Price			-	18.67	18.57	24.73
Volume Traded	-	-	-	364	282	282
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	17.00 - 22.50	17.00 - 22.50	24.00-31.00	15.00 - 20.50	15.00 - 19.00	16.50-24.00
Wtd Avg Price	19.03	19.39	27.80	16.87	16.66	20.64
Volume Traded	1,072	1,859	1,026	2,736	2,767	2,980
Volume Exported	952	1,618	786	734	857	849
20% or More						
Price Range	-	-	-	17.00	17.00	20.00
Wtd Avg Price	-	-	-	17.00	17.00	20.00
Volume Traded	-	-	-	41	41	80
Volume Exported	-	-	-	-	-	-



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

Fat Content	Frozen			Fresh		
	Sep 2009	Aug 2009	Sep 2008	Sep 2009	Aug 2009	Sep 2008
15% or Less						
Wtd Avg Price	-	20.00	27.49	19.07	20.20	27.17
Volume Traded	-	216	316	1,170	981	1,148
Volume Exported	-	216	316	-	-	-
15-20%						
Wtd Avg Price	18.86	19.34	28.25	17.21	17.77	21.88
Volume Traded	6,748	7,073	6,260	13,286	12,115	12,855
Volume Exported	5,948	6,532	5,142	3,773	2,774	3,915
20% or More						
Wtd Avg Price	-	-	-	17.80	19.66	21.00
Volume Traded	-	-	-	204	246	322
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 30 OCTOBER 2009.

The market tone on tom bulk parts was steady to fully steady. Demand was light to moderate. Offerings were short to barely adequate with full cut wings short of full needs. The trade sentiment on white meat items was steady. Demand was light. Offerings were adequate to fully adequate. The market tone on thigh meat was firm. Demand was moderate to good. Offerings failing to fulfill requirements. Domestic: Frozen hearts 27, fresh tom necks 38-40, fresh MST 17 for pet food, fresh to full-cut wings 76, fresh scapula 113 and fresh wing meat 130-132.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, OCTOBER 30, 2009	RANGE	CODE 1/	PRICE	(000)	PRICE	(000)
DRUMSTICKS, TOMS	59.00		59.00	80	58.25	160
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	73.00	120	72.53	174
TAILS		W	32.00	27	32.00	27
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		W	99.00	40	99.00	80

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
THURSDAY, OCTOBER 29, 2009	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		W	57.50	80
WINGS FULL-CUT - TOMS		R	73.00	54
WINGS, V-TYPE, TOM	73.00		73.00	120
TAILS		W	32.00	27
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	20.50	108
		W	99.00	40

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
WEDNESDAY, OCTOBER 28, 2009	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	57.00-58.00		57.50	80
WINGS FULL-CUT - TOMS		R	73.00	54
WINGS, V-TYPE, TOM	71.50		71.50	54
TAILS	32.00		32.00	27
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	99.00	R	20.50	108
			99.00	40

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
TUESDAY, OCTOBER 27, 2009	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	56.00	80
WINGS FULL-CUT - TOMS		R	73.00	54
WINGS, V-TYPE, TOM		F	66.00	360
TAILS		F	31.19	134
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	99.00	R	20.50	108
			99.00	40

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
MONDAY, OCTOBER 26, 2009	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	56.00	80
WINGS FULL-CUT - TOMS		R	73.00	54
WINGS, V-TYPE, TOM		F	66.00	360
TAILS		F	31.19	134
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	20.50	108
		F	96.00	80

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.