



INTERNATIONAL EGG AND POULTRY REVIEW



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

EU-27 Layer Welfare

The European Union adopted Council Directive 1999/74/EC, setting minimum standards for the protection of laying hens in July, 1999. The Directive set minimum standards for laying hens kept in battery cages. It exempts establishments with fewer than 350 laying hens and establishments rearing breeding laying hens.

Provisions for unenriched cage systems went into effect on January 1, 2003 requiring a minimum space of at least 550 cm² per hen per cage, among other requirements, and no new cage systems could be built as of this date. Effective January 1, 2012 keeping laying hens in conventional cages will be prohibited.

A set of requirements was set for alternative systems; from January 1, 2002 all newly built or rebuilt systems brought into use for the first time had to meet these requirements. From January 1, 2007 the minimum requirements applied to all alternative systems.

After January 1, 2002 minimum requirements for enriched cages include at least 750 cm² of cage area per hen, 600 cm² of which shall be usable, and no cage shall have a total area that is less than 2000 cm². Additional provisions are made for other details of enriched cages.

Member States are allowed to maintain or apply more stringent provisions. Austria banned the use of conventional cages effective January 1, 2009 and enriched cages will be banned by 2020; Germany required all laying hens to be out of conventional cages by the end of 2009; Sweden phased out conventional cages by the end of 2002.

Source: Official Journal of the European Communities, news wires

Number of Laying Hens by way of keeping in '000 heads

	2007	%	2008	%	2009	%
Cage	266,931	68.8	262,990	67.8	251,121	49.3
Enriched Cage					8,080	1.6
Free Range	65,725	16.9	65,610	16.9	32,497	6.4
Barn	49,103	12.6	50,383	13.0	60,463	11.9
Organic	7338	1.9	8,716	2.2	9,510	1.9
Other*					147,649	29.0
Total	389,097		387,699		509,320	

*Difference between the total of the Eurofarm Structure survey and the total of the communications according to reg. 589/2008

Source: European Commission, Agriculture and Rural Development DG

2008 EU-27 Average Number of Laying Hens by Production Type

	Cage		Production Alternative			Total Alternative	Total Production	% Alternative of Total Prod.
	Non-Enriched	Enriched	Free Range	Barn	Organic			
Italy	39,956,235		560,600	8,173,438	1,014,634	9,748,672	49,704,907	19.61
Spain	44,985,124		557,280	696,284	90,667	1,344,231	46,329,355	2.90
Germany	27,500,691		5,834,743	9,715,820	2,454,140	18,004,703	45,505,394	39.57
France	36,040,960		5,378,748	1,302,190	1,526,583	8,207,521	44,248,481	18.55
Romania	3,221,658	1,134,401	34,229,743	752,338	3,860	34,985,941	39,342,000	88.93
UK	16,588,017	1,323,448	12,255,474	2,573,069	1,543,794	16,372,337	34,283,802	47.76
Poland*	32,012,721		125,410	1,827,837	16,800	1,970,047	33,982,768	5.80
NL	13,916,200		3,633,400	12,750,000	760,800	17,144,200	31,060,400	55.20
Czech Rep	5,577,012		2,747	170,591	6,920	180,258	5,757,270	3.13
Others	40,544,012	189,460	3,031,840	12,421,179	1,297,982	16,751,001	57,484,473	0.29
EUR 27	262,989,939		65,609,985	50,382,746	8,716,180	124,708,911	387,698,850	32.17

*Polish-industrial laying hens, which is 64% of total laying hen population

Source: <http://circa.europa.eu/Public/irc/agri/pig/library>

EU-27 Egg Production Forecast in 1,000 metric tons

	FR	ES	IT	DE	NL	UK	PL	RO	CZ	Others	Total
2010	943	924	743	716	639	645	590	335	188	1,260	6,983
2009	943	924	743	671	645	647	590	335	188	1,248	6,934
2008	947	924	748	787	644	646	590	335	192	1,274	7,086

**Data based on Regulation (EC) no. 557/2007 art 31

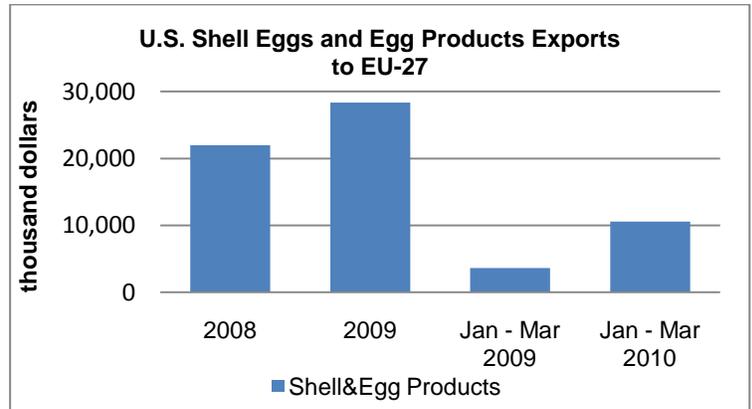
(France, Spain, Italy, Germany, Netherlands, United Kingdom, Poland, Romania, Czech Republic)

Source: European Commission, Agriculture and Rural Development DG

U.S. Shell Egg and Egg Product Exports to EU-27 Shell Eggs in dozens, Egg Products in MT

	2008	2009	2009	2010
			Jan - Mar	2010
0407000040 - Brd egg fr,pr,ck	772,645	395,065	89,858	0
0408910000 - Bird eggs n/shell	1,981	3,653	549	1,808
0408110000 - Egg yolks, dried	2,708	3,049	228	718
3502110000 - Egg albm, dried	288	609	70	184
3502190000 - Egg albm x d	22	396	0	27
0408990000 - Brd egg n/sh,fr	870	322	0	174
0408190000 - Egg ylk,fr,fz,ck	43	123	0	261

U.S. shell egg and egg products exports to the EU expanded sharply in 2009, and continued to expand in the first quarter of 2010. The major destinations were Germany, Denmark and the Netherlands. For the first three months of 2010, exports to Germany grew 103% (from \$2.1 million to \$4.40 million); Denmark rose 256% (from \$623,000 to \$2.2 million) and the Netherlands increased tenfold (from \$100,000 to \$1.1 million).



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

INSPECTED EGG PRODUCTS-

U.S. & CANADA IMPORT/EXPORT TRADE

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

Type	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Liquid	44	478	1,933	3,928
Frozen	0	0	0	0
Dried	8	38	204	260
Total	52	516	2,137	4,188

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

Type	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Liquid	321	272	8,538	6,900
Frozen	3	5	186	171
Dried	0	0	0	0
Total	324	277	8,724	7,071

Inspected Shell Eggs

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

	Year-To-Date			
	2010	2009 /1	2010 /2	2009
Jumbo	0	0	0	0
Extra Large	3,930	1,660	25,746	21,303
Large	4,720	3,460	47,055	55,289
Medium	1,545	1,890	20,862	23,550
Ungraded	3,780	3,948	86,863	106,370
Misc	0	1,133	0	3,708
Total	13,975	12,091	180,526	210,220

/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 29-May-10 (Preliminary)

U.S. fowl slaughtered domestically

	Light Hens	Heavy Hens	Total Hens
	-----Thousands-----		
Head	1,440	1,386	2,826
Last Week	1,380	1,490	2,870
Same week yr ago	1,174	1,207	2,381
To-date/2010*	30,762	28,409	59,171
To-date/2009*	26,658	31,165	57,823

U.S. fowl slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
	-----Thousands-----		
Head	293	0	293
Last Week	387	15	402
Same week yr ago	137	0	137
To-date/2010*	7,549	153	7,702
To-date/2009*	5,649	11	5,660

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	1,733	1,386	3,119
Last Week	1,767	1,505	3,272
Same week yr ago	1,311	1,207	2,518
To-date/2010*	38,311	28,562	66,873
To-date/2009*	32,307	31,176	63,483

*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 price trend for fresh and frozen 15-20% MSC was steady to lower with the balance of fat contents steady. Supplies of fresh and frozen 15-20% were moderate to heavy with the remainder of fat contents moderate. Schedules were seasonally normal. Export and domestic demand on frozen 15-20% was moderate and light on fresh 15-20%. MSC moved best into countries in the Caribbean and Central America with very light interest and movement into Mexico. Market activity was slow to moderate following the Memorial Day holiday as many were buying hand to mouth. The marketplace was mixed with some noting increased availability of frames for sale or going to rendering, while others were working to cover regular orders on a short week. Many are watching the protein complex closely these next few weeks to see how things unfold as we begin to prepare for the season's traditional peak. Supplies of raw materials were heavy. Frame values were steady to lower with trading levels ranging 6.5-10 cents FOB, mostly 8 cents FOB.

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

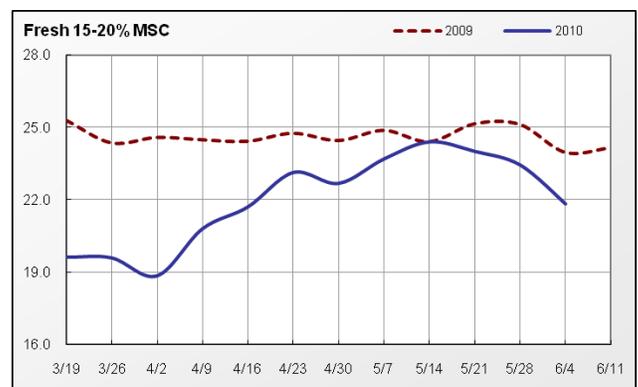
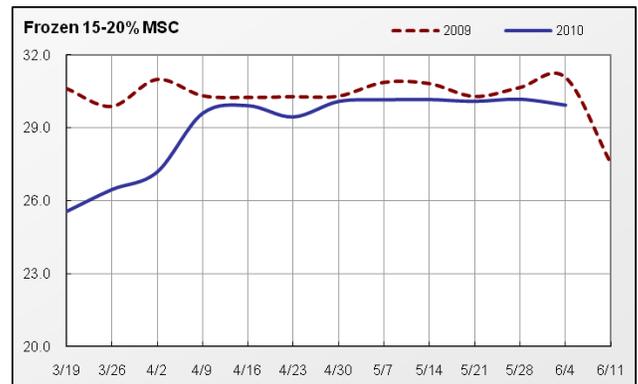
Fat Content	Frozen			Fresh		
	4-Jun-10	Last Week	Last Year	4-Jun-10	Last Week	Last Year
15% or Less						
Price Range		32.00	-	26.00 - 28.00	26.00-31.00	29.00-31.00
Wtd Avg Price		32.00	-	27.20	26.96	29.60
Volume Traded	-	40	-	136	213	336
Volume Exported	-	-	-	54	50	54
15-20%						
Price Range	26.00 - 33.00	28.00 - 33.00	27.00-35.00	18.00 - 26.00	15.00 - 28.00	17.00-28.00
Wtd Avg Price	29.94	30.18	31.09	21.81	23.43	23.96
Volume Traded	1,522	1,714	1,055	3,519	2,774	2,599
Volume Exported	1,266	1,402	935	41	41	734
20% or More						
Price Range	-	-	-	22.00	22.00	22.00
Wtd Avg Price	-	-	-	22.00	22.00	22.00
Volume Traded	-	-	-	41	41	82
Volume Exported	-	-	-	-	-	-

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

Fat Content	Frozen			Fresh		
	May 2010	Apr 2010	May 2009	May 2010	Apr 2010	May 2009
15% or Less						
Wtd Avg Price	32.00	31.00	-	26.28	26.18	29.12
Volume Traded	40	120	-	718	679	1,947
Volume Exported	-	-	-	100	100	272
15-20%						
Wtd Avg Price	30.15	29.13	30.53	23.90	21.83	24.83
Volume Traded	7,357	10,639	7,835	15,816	22,877	16,136
Volume Exported	6,645	9,319	6,515	2,407	1,795	5,916
20% or More						
Wtd Avg Price	-	-	-	22.00	20.20	22.00
Volume Traded	-	-	-	204	204	326
Volume Exported	-	-	-	-	-	-

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

Source: USDA AMS Poultry Market News & Analysis



Source: USDA AMS Poultry Market News & Analysis

NATIONAL YOUNG TURKEY PARTS, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 04 JUNE, 2010.

The market tone on bulk parts was steady to fully steady with the exception of tom necks steady to instances weak. Demand and offerings remained light to moderate. Tom necks most available but offered at current market levels. White meat was steady to firm. Demand was light to moderate, most inquiry centering on trims. Offerings were light to at times very light and confidently held. High meat was steady. Demand was light to moderate. Offerings were light. Market activity was slow to moderate. For domestic: frozen plant grade 20-24 lb. breasts (basted) 120, frozen mature breeder hen destrapped tenders 178, fresh scapula meat 151, frozen tom gizzards (machine cut, machine defatted) 94 cents delivered. For Export: frozen tom breast meat 225, fresh tom drums 71 cents delivered port or border.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, JUNE 04, 2010	RANGE	CODE 1/	PRICE	(000)	WTD AVG	VOLUME
					PRICE	(000)
DRUMSTICKS, TOMS	72.00		72.00	108	72.60	270
WINGS FULL-CUT - TOMS		F	72.00	108		
WINGS, V-TYPE, TOM	87.00-88.00		87.50	216	87.50	216
TAILS	40.00		40.00	40	40.00	60
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	120.00-121.0		120.20	300	120.32	440

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
THURSDAY, JUNE 03, 2010	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		W	73.00	162
WINGS FULL-CUT - TOMS		F	72.00	108
WINGS, V-TYPE, TOM		R	86.68	564
TAILS	40.00		40.00	20
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	121.00		121.00	80

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
WEDNESDAY, JUNE 02, 2010	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	73.00		73.00	162
WINGS FULL-CUT - TOMS		F	72.00	108
WINGS, V-TYPE, TOM		R	86.68	564
TAILS		F	40.42	118
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		T	120.00	60

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
TUESDAY, JUNE 01, 2010	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	75.25	80
WINGS FULL-CUT - TOMS		F	72.00	108
WINGS, V-TYPE, TOM		R	86.68	564
TAILS		F	40.42	118
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	120.00		120.00	60

NO EXPORT TRADING ON MONDAY, MAY 31, 2010 ~ DUE TO MEMORIAL DAY HOLIDAY ~

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.