



INTERNATIONAL EGG AND POULTRY REVIEW



U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News and Analysis Branch

Philippines Poultry Industry Grew 3.72% in 2010

According to the Philippines Bureau of Statistics (BAS), the poultry subsector grew by 3.72% in 2010 and accounted for 14.93% of total agricultural production. Chicken and chicken egg production has steadily grown over the past few years. In contrast, duck and duck egg production has steadily declined. Native chickens accounted for 47% of the chicken inventory, broilers 34%, and layers 19% in 2010.

Poultry and Eggs: Volume of Production

Poultry Products, Period and Year, in thousand metric tons

	Chicken eggs	Duck eggs	Chicken	Duck
2000	243,381	53,465	997,816	51,490
2001	246,700	53,913	1,098,793	53,520
2002	260,830	53,633	1,173,738	54,107
2003	274,813	54,044	1,188,738	53,903
2004	296,576	56,593	1,231,794	53,195
2005	320,322	53,232	1,215,674	49,380
2006	330,288	50,027	1,205,951	45,987
2007	335,104	46,990	1,211,622	42,456
2008	350,789	42,454	1,281,343	39,206
2009	368,464	39,617	1,300,898	35,928
2010	387,335	36,676	1,353,127	32,978

Source: Bureau of Agricultural Statistics, www.bas.gov.ph

Chicken production grew by 4.01% in 2010. The larger volume of broilers was due to expansion in stocking capacity and sufficient supply of day old chicks. Chicken egg production grew by 5.12%; a higher inventory of laying flocks combined with increases in the egg-laying efficiency ratio of layers in several provinces. The downward trend in duck and duck eggs production continued with this year's declines of 8.24% and 7.44%, respectively. Duck egg production was constrained by lingering hot weather that resulted in low laying efficiency ratios.

Value of Production at Current Prices, in million pesos

	January-December 2008-2010			Growth Rates	
	2008	2009	2010	08-09	09-10
Poultry	131,691.23	145,093.47	152,065.13	10.18	4.80
Chicken	98,317.99	108,221.87	112,972.82	10.07	4.39
Duck	2,633.90	2,465.48	2,505.82	-6.39	1.64
Chicken Eggs	27,928.31	31,462.80	33,714.07	12.66	7.16
Duck Eggs	2,811.04	2,943.32	2,872.41	4.71	-2.41

Source: Bureau of Agricultural Statistics, www.bas.gov.ph

The gross value of poultry production at current prices in 2010 totaled P152.1 billion, up 4.80% compared to 2009. The value of chickens rose 4.39%, ducks 1.64% and chicken eggs 7.16%. The gross earnings of duck eggs fell 2.41% due to lower production. Weighted average farmgate prices for poultry rose 1.04% in 2010. The largest increase came in duck prices, from an average of 68.60 pesos per kilogram in 2009 to 75.98 pesos per kilogram in 2010.

Weighted Average Farmgate Price January-December 2008-2010

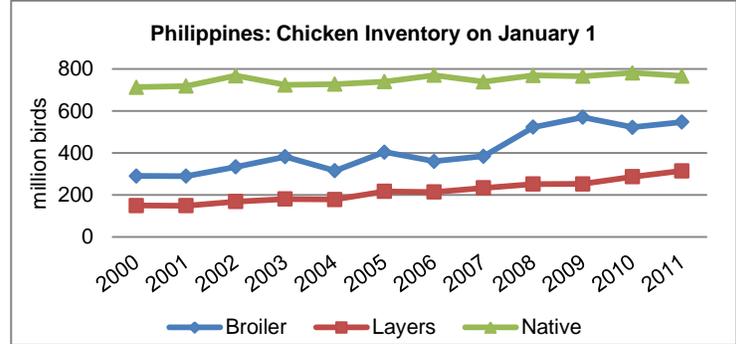
	Peso Per Kilogram			Growth Rates	
	2008	2009	2010	08-09	09-10
Chicken	76.73	83.19	83.49	8.42	0.36
Duck	67.14	68.60	75.98	2.17	10.76
Chicken Eggs	79.62	85.39	87.04	7.25	1.93
Duck Eggs	66.22	74.27	78.31	12.16	5.44

Source: Bureau of Agricultural Statistics, www.bas.gov.ph

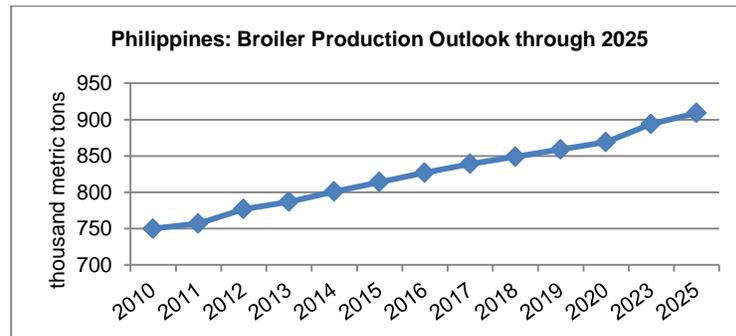
Poultry Consumption (per capita kg/yr)

	Chicken Eggs	Duck Eggs	Chicken	Duck
2008	3.57	0.44	9.43	0.16
2009	3.69	0.40	9.58	0.15

Source: Bureau of Agricultural Statistics, www.bas.gov.ph



Source: Bureau of Agricultural Statistics, www.bas.gov.ph



Source: FAPRI-ISU 2011 Agricultural Outlook

Philippines chicken imports in MT

	2007	2008	2009	2008/07	2009/08
Chicken cuts	1,951	3,387	2,993	74%	-12%
CLQ*	24,537	16,069	26,372	-35%	64%
Chicken offal		16	40		153%
Deboned	18,080	25,421	36,887	41%	45%
Fats	11	47	212	333%	348%
Rind/skin	27	421	511	1,458%	21%
Whole chicken	469	410	251	-13%	-39%
Total	45,075	45,772	67,265	2%	47%

*Chicken leg quarters

Philippines chicken imports by country/market share in MT

	2007	2008	2009		
Australia	5,727	13%	5,477	12%	5,881 9%
Belgium	27	0%	321	1%	1,477 2%
Brazil	5,763	13%	8,216	18%	14,125 21%
Canada	13,627	30%	17,122	38%	17,115 25%
Netherlands	5	0%	277	1%	390 1%
Malaysia	24	0%	0	0%	51 0%
USA	19,848	44%	13,743	30%	27,636 41%
UK	0	0%	0	0%	525 1%
France	0	0%	585	1%	0 0%
New Zealand	0	0%	31	0%	40 0%
Others	54	0%	0	0%	24 0%
Total	45,075		45,772		67,265

Source: Bureau of Animal Industry, National Veterinary Quarantine Service

Chicken meat imports grew 47% between 2008 and 2009. In 2009 the majority came from the United States (41%), Canada (25%) and Brazil (21%). In 2009, the Philippine Department of Agriculture approved special importations of chicken of up to 8,000 MT, exempt from special safeguard duties, which contributed to the increase in chicken trade last year.

Source: USDA GAIN Report, Philippines Bureau of Agricultural Statistics

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

U.S. Exports to Canada, in Pounds (000) (Preliminary)
Week Ending Apr 09, 2011 Year-To-Date*

Type	2011	2010 /1	2011 /2	2010
Liquid	0	96	338	1,503
Frozen	0	0	0	0
Dried	0	0	0	156
Total	0	96	338	1,659

U.S. Imports From Canada, in Pounds (000) (Preliminary)
Week Ending Apr 09, 2011 Year-To-Date*

Type	2011	2010 /1	2011 /2	2010
Liquid	356	316	4,901	5,511
Frozen	16	5	240	116
Dried	0	0	0	0
Total	372	321	5,141	5,627

Inspected Shell Eggs

U.S Exports to Canada, In 30-Dozen Cases (Preliminary)
Week Ending Apr 09, 2011 Year-To-Date*

Type	2011	2010 /1	2011 /2	2010
Jumbo	0	0	0	0
Extra Large	2,610	2,130	15,559	9,810
Large	4,860	30	29,140	31,160
Medium	1,740	1,590	5,755	10,050
Ungraded	648	11,226	20,836	61,866
Misc	0	0	0	0
Total	9,858	14,976	71,290	112,886

/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 Apr 09, 2011 (Preliminary)

U.S. fowl slaughtered domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,493	1,392	2,885
Last Week	1,060	1,301	2,361
Same week yr ago	1,449	1,135	2,584
To-date/2011*	20,143	20,763	40,906
To-date/2010*	20,425	18,409	38,834

U.S. fowl slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	316	0	316
Last Week	409	25	434
Same week yr ago	438	0	438
To-date/2011*	5,358	121	5,479
To-date/2010*	4,665	80	4,745

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	1,809	1,392	3,201
Last Week	1,469	1,326	2,795
Same week yr ago	1,887	1,135	3,022
To-date/2011*	25,501	20,884	46,385
To-date/2010*	25,090	18,489	43,579

*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 trended firm to higher on fresh 15-20%; steady to higher on frozen. Supplies are light to moderate. Schedules were mostly normal. Demand into domestic channels was moderate to good; with best interest centering on movement of fresh 15-20%. Export demand was also moderate to good with good interest continuing on frozen 15-20% with light trade activity due to product availability. Market activity was moderate to active. The spot marketplace remains strong although industry maintains a cautious attitude and many packers continue to stay out front on MSC sales. Supplies of raw materials are tight. Frame values were firm with limited trading occurring between 11-13.5 cents FOB.

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

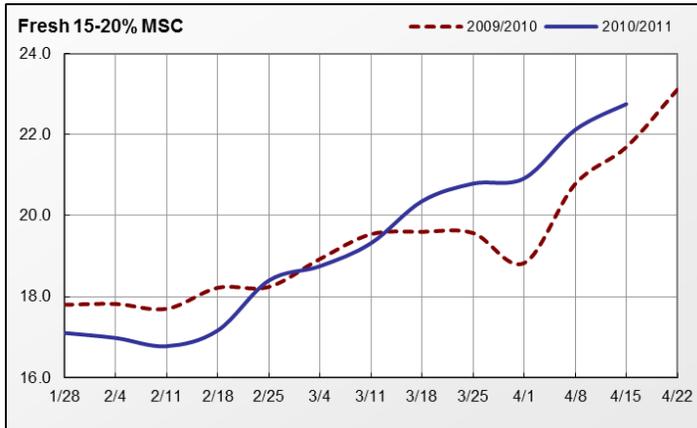
Fat Content	Frozen			Fresh		
	15-Apr-11	Last Week	Last Year	15-Apr-11	Last Week	Last Year
15% or Less						
Price Range		28.00	30.00	24.00	23.00	25.00-26.00
Wtd Avg Price		28.00	30.00	24.00	23.00	25.71
Volume Traded	-	80	40	82	143	173
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	24.00 - 27.00	24.00 - 27.00	24.00-33.00	21.50 - 25.00	20.00 - 25.00	16.25-30.00
Wtd Avg Price	25.70	25.70	29.92	22.75	22.12	21.69
Volume Traded	1,978	1,752	2,036	3,457	4,119	3,998
Volume Exported	1,838	1,472	1,716	-	-	-
20% or More						
Price Range	-	-	-	18.00 - 20.00	18.00 - 20.00	20.00
Wtd Avg Price	-	-	-	19.00	19.00	20.00
Volume Traded	-	-	-	82	163	41
Volume Exported	-	-	-	-	-	-

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

Fat Content	Frozen			Fresh		
	Mar 2011	Feb 2011	Mar 2010	Mar 2011	Feb 2011	Mar 2010
15% or Less						
Wtd Avg Price	-	-	25.00	20.83	19.29	23.30
Volume Traded	-	-	40	245	694	408
Volume Exported	-	-	-	-	-	-
15-20%						
Wtd Avg Price	23.86	22.69	25.48	19.80	17.34	19.37
Volume Traded	6,170	6,087	5,689	13,826	15,732	14,453
Volume Exported	5,930	5,367	4,937	1,183	1,224	1,958
20% or More						
Wtd Avg Price	-	-	-	18.91	19.00	18.50
Volume Traded	-	-	-	449	571	245
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 15 April 2011.

The market on bulk parts was steady to fully steady. Demand was light to moderate. Offerings light and short of full needs. The market on all white meat was steady to fully steady. Demand was light to moderate. Offerings of all white meat was light to moderate, mostly light. Thigh meat market is steady to firm. Demand was light to moderate with light offerings. The market on mechanically separated turkey is steady. Demand was light. Offerings light to moderate. Trading was slow to moderate.

Export Trading	Price	L.S.T.	Wtd Avg	Volume	Weekly	Weekly
Friday, April 15, 2011	Range	Code 1/	Price	(000)	Wtd Avg	Volume
					Price	(000)
Drumsticks, Toms	78.00		78.00	54	80.82	228
Wings Full-Cut - Toms						
Wings, V-Type, Tom		F	97.00	240		
Tails	41.00		41.00	40	41.50	80
Mechanically Separated 2/	30.00		30.00	80	30.00	80
Thigh Meat - Frozen		W	134.00	42	134.00	42
Export Trading	Price	L.S.T.	Wtd Avg	Volume		
Thursday, April 14, 2011	Range	Code 1/	Price	(000)		
Drumsticks, Toms	81.00-82.00		81.69	174		
Wings Full-Cut - Toms						
Wings, V-Type, Tom		F	97.00	240		
Tails	42.00		42.00	40		
Mechanically Separated 2/		F	31.00	54		
Thigh Meat - Frozen		W	134.00	42		
Export Trading	Price	L.S.T.	Wtd Avg	Volume		
Wednesday, April 13, 2011	Range	Code 1/	Price	(000)		
Drumsticks, Toms						
Wings Full-Cut - Toms						
Wings, V-Type, Tom		F	97.00	240		
Tails		F	42.00	40		
Mechanically Separated 2/		F	31.00	54		
Thigh Meat - Frozen	134.00		134.00	42		
Export Trading	Price	L.S.T.	Wtd Avg	Volume		
Tuesday, April 12, 2011	Range	Code 1/	Price	(000)		
Drumsticks, Toms						
Wings Full-Cut - Toms						
Wings, V-Type, Tom		F	97.00	240		
Tails		F	42.00	40		
Mechanically Separated 2/		F	31.00	54		
Thigh Meat - Frozen		R	132.00	27		
Export Trading	Price	L.S.T.	Wtd Avg	Volume		
Monday, April 11, 2011	Range	Code 1/	Price	(000)		
Drumsticks, Toms						
Wings Full-Cut - Toms						
Wings, V-Type, Tom		F	97.00	240		
Tails		F	42.00	40		
Mechanically Separated 2/		F	31.00	54		
Thigh Meat - Frozen		R	132.00	27		

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.