



# INTERNATIONAL EGG AND POULTRY REVIEW



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

## Colombia

The United States (U.S.)-Colombia Trade Promotion Agreement will take effect May 15, 2012 since both countries have now exchanged letters confirming they had completed applicable legal requirements and procedures. The U.S.-Colombia Trade Promotion Agreement implementing bill was approved on October 12, 2011.

Currently, poultry meat ranks highest in per-capita consumption for Colombia when compared to beef and pork meat. Throughout the negotiating process Colombia had been seeking lenient agriculture positions resulting in the U.S. agreeing to give the most sensitive sectors longer tariff phase out periods and poultry is one of these.

Colombia currently places a 20% import duty on U.S. chicken leg quarters. When the agreement is implemented Colombia will provide the U.S. an immediate duty-free 27,040 metric ton (MT) tariff-rate quota (TRQ) that increases 4% annually. The 164.4% over-quota tariff for fresh, chilled and frozen leg quarters and the 70% over quota tariff for processed leg quarters will be phased out over 18 years with no reduction happening the first 6 years of the agreement. Colombia will also have access to a safeguard on chicken leg quarters in case of an annual import surge during the 18 year tariff phase-out period.

Colombia will provide a 412 MT spent fowl TRQ. The TRQ will increase 3% annually and the 45% over-quota tariff will phase out over 18 years. Spent fowl will also have access to an annual import surge safeguard during the phase-out period. Also, duties on eggs for consumption will phase out over 10 years, tariffs on turkey products over 5 years, and immediately on poultry products such as breast meat and wings.

Sources: Office of the U.S. Trade Representative; USDA, Foreign Agricultural Service, March 15, 2012 Colombia Grain and Feed Annual; USDA, Foreign Agricultural Service, U.S.-Colombia Trade Promotion Agreement Benefits for Agriculture; ThePoultrySite

## Total Colombia Broiler Meat Imports, Exports & Per Capita Consumption 2008-2012 Comparisons (Imports & Exports in 1,000 Metric Tons)

	2008	2009	2010	2011	2012
<b>Total Imports</b>	30	29	36	37	40
<b>Exports</b>	4	2	5	5	5
<b>Per Capita Consumption*</b>	24.04	23.97	23.89	24.10	24.10

\*Kilograms

Source: USDA, Foreign Agricultural Service, Official USDA Estimates

## U.S. Broiler Meat Exports to Colombia January-February 2008-2012 Comparisons

	Top 3 Items (Metric Tons)				
	2008	2009	2010	2011	2012
<b>Frozen Other Chicken</b>	98	2,061	504	1,419	4,484
<b>Frozen MSC*</b>	2,725	2,961	2,465	1,496	845
<b>Frozen Chicken Leg Quarters</b>	222	99	385	64	126
<b>Other</b>	969	777	1,341	589	171
<b>Total of All Items</b>	4,013	5,899	4,695	3,567	5,626

\* Mechanically Separated Chicken

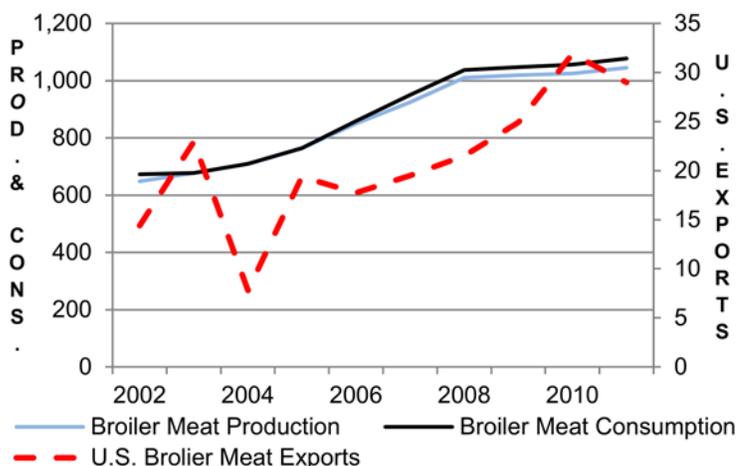
Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

## 2008-2012 U.S. Turkey Meat Exports to Colombia January-February Cumulative Total Comparisons

	Top 3 Items (Metric Tons)				
	2008	2009	2010	2011	2012
<b>Other Turkey</b>	0.0	0.0	0.0	0.0	158
<b>Frozen Turkeys</b>	1.7	.6	13.7	0.0	37
<b>Frozen Turkey Breast</b>	2.7	0.0	3.0	0.0	25.1
<b>Other</b>	0.0	4.7	5.4	26.5	4.5
<b>Total of All Items</b>	4.4	5.3	22.1	26.5	224.8

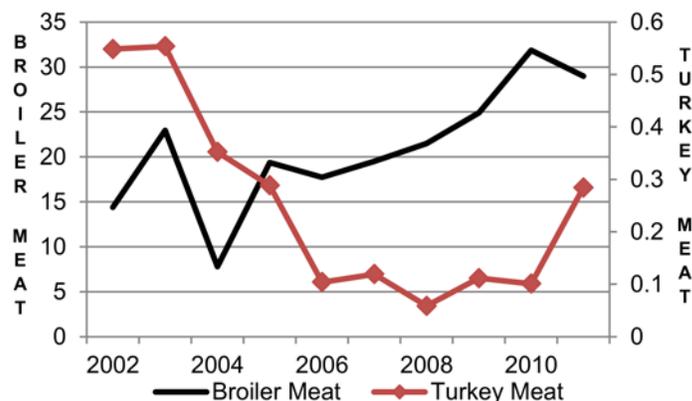
Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

**U.S. Broiler Meat Colombia Exports Versus Total Colombia Broiler Meat Domestic Consumption & Production 2002-2011 Comparisons (1,000 Metric Tons)**



Sources: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service; USDA, Foreign Agricultural Service, Official USDA Estimates

**U.S. Broiler & Turkey Meat Exports to Colombia 2002-2011 Comparisons (Thousand Metric Tons)**



Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics/USDA, Foreign Agricultural Service

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

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

Type	Year-To-Date*			
	2012	2011 /1	2012 /2	2011
Liquid	49	48	431	386
Frozen	0	0	0	0
Dried	0	0	0	0
Total	49	48	431	386

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

Type	Year-To-Date*			
	2012	2011 /1	2012 /2	2011
Liquid	208	236	5,785	5,531
Frozen	3	3	355	252
Dried	0	0	0	0
Total	211	239	6,140	5,783

**INSPECTED SHELL EGGS**

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

Type	Year-To-Date*			
	2012	2011 /1	2012 /2	2011
Jumbo	0	0	0	0
Extra Large	1,920	3,720	25,500	24,109
Large	4,080	7,350	55,292	43,290
Medium	1,031	1,200	11,133	8,725
Ungraded	1,920	4,920	37,608	29,178
Misc	0	0	0	0
Total	8,951	17,190	129,533	105,302

/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 21, 2012 (Preliminary)

**U.S. Fowl Slaughtered Domestically**

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,969	1,483	3,452
Last Week	1,828	1,402	3,230
Same week yr ago	1,519	1,387	2,906
To-date/2012*	25,981	23,460	49,441
To-date/2011*	22,983	23,487	46,470

**U.S. Fowl Slaughtered in Canada**

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	447	0	447
Last Week	309	0	309
Same week yr ago	411	12	423
To-date/2012*	4,913	36	4,949
To-date/2011*	6,320	133	6,453

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	2,416	1,483	3,899
Last Week	2,137	1,402	3,539
Same week yr ago	1,930	1,399	3,329
To-date/2012*	30,894	23,496	54,390
To-date/2011*	29,303	23,620	52,923

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

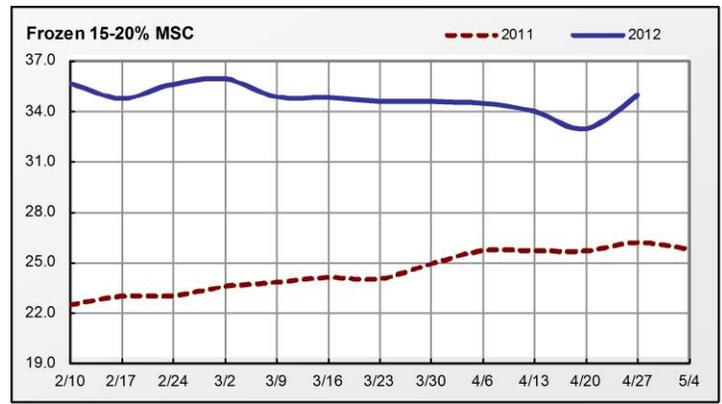
**NATIONAL MECHANICALLY SEPARATED CHICKEN**

(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 are trending steady on MSC. Supplies are moderate to heavy. Schedules are mostly normal. Domestic and export demand is light to moderate. The spot marketplace is slow to moderate as producers were somewhat cautious and took a conservative outlook on the future marketplace and continue to utilize all options available to stay ahead on spot sales of MSC. Market activity is light to moderate. Supplies of raw material are moderate to heavy. Spot trading for frames was noted at 11-14 cents FOB, mostly 11-13.50 FOB.

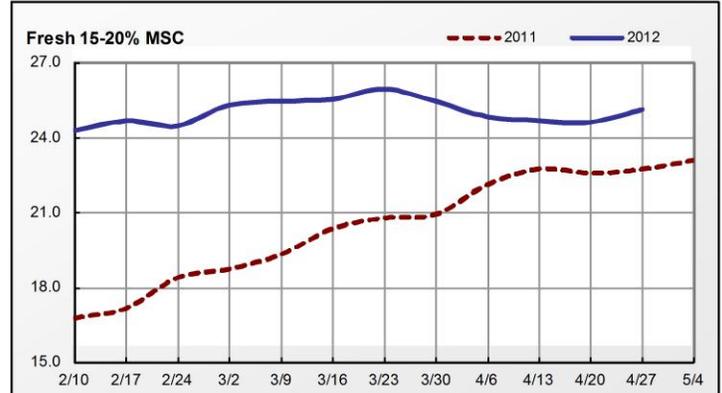
**Weekly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)**

Fat Content	Frozen			Fresh		
	27-Apr-12	Last Week	Last Year	27-Apr-12	Last Week	Last Year
<b>15% or Less</b>						
Price Range			-	25.25	-	26.00
Wtd Avg Price			-	25.25	-	26.00
Volume Traded	-	-	-	82	-	204
Volume Exported	-	-	-	-	-	-
<b>15-20%</b>						
Price Range	32.00 - 37.00	28.00 - 37.00	24.00-29.00	22.50 - 35.00	18.00 - 27.00	20.00-26.00
Wtd Avg Price	34.96	32.96	26.19	25.12	24.61	22.73
Volume Traded	1,175	2,241	1,898	4,002	3,259	3,345
Volume Exported	935	1,601	1,578	691	204	-
<b>20% or More</b>						
Price Range	-	-	-	22.50	22.50	20.00
Wtd Avg Price	-	-	-	22.50	22.50	20.00
Volume Traded	-	-	-	82	41	122
Volume Exported	-	-	-	-	-	-



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

Fat Content	Frozen			Fresh		
	Mar 2012	Feb 2012	Mar 2011	Mar 2012	Feb 2012	Mar 2011
<b>15% or Less</b>						
Wtd Avg Price	-	-	-	26.92	27.56	20.83
Volume Traded	-	-	-	775	653	245
Volume Exported	-	-	-	-	-	-
<b>15-20%</b>						
Wtd Avg Price	34.92	35.46	23.86	25.56	24.33	19.80
Volume Traded	9,964	7,800	6,170	19,562	15,773	13,826
Volume Exported	8,629	6,839	5,930	4,264	2,693	1,183
<b>20% or More</b>						
Wtd Avg Price	-	-	-	22.30	22.38	18.91
Volume Traded	-	-	-	408	163	449
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 ([www.ams.usda.gov/pymarketnews.htm](http://www.ams.usda.gov/pymarketnews.htm))

**NATIONAL YOUNG TURKEY PARTS**

INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 27 APR 2012.

The market on bulk parts was steady, instances weak. Demand and offerings was light to moderate. The white meat market is steady to weak. Demand was light. Offerings light to heavy. The market on thigh meat was barely steady to weak. Demand was limited. Offerings light to heavy. Mechanically separated turkey was steady. Demand and offerings light to moderate. Trading was slow to moderate. For domestic: fresh full cut wings 56-60 cents, fresh tom necks 47-51 cents, fresh tail 54 cents, fresh scapula 99.5-107 cents, frozen tails 54 cents, frozen hearts 38 cents, and frozen grade A breast non basted 8-10 lbs. 167 cents, 12-16 lbs 177 cents delivered.

**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
<b>FRIDAY, APRIL 27, 2012</b>						
DRUMSTICKS, TOMS	68.00-71.00		70.07	174	69.92	552
WINGS FULL-CUT - TOMS	55.00		55.00	120	55.00	444
WINGS, V-TYPE, TOM		R	107.25	108	107.25	108
TAILS	52.00		52.00	40	52.00	40
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	117.00		117.00	40	117.00	40
<b>THURSDAY, APRIL 26, 2012</b>						
DRUMSTICKS, TOMS	69.00-72.00		69.75	216		
WINGS FULL-CUT - TOMS		W	55.00	324		
WINGS, V-TYPE, TOM	107.25		107.25	108		
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN						
<b>WEDNESDAY, APRIL 25, 2012</b>						
DRUMSTICKS, TOMS	70.00		70.00	162		
WINGS FULL-CUT - TOMS	55.00		55.00	324		
WINGS, V-TYPE, TOM		F	106.50	162		
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN						
<b>TUESDAY, APRIL 24, 2012</b>						
DRUMSTICKS, TOMS		F	80.13	324		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		F	106.50	162		
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		T	135.50	80		
<b>MONDAY, APRIL 23, 2012</b>						
DRUMSTICKS, TOMS		F	80.13	324		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		F	106.50	162		
TAILS		M	51.00	40		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		T	135.50	80		

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.