

INTERNATIONAL EGG AND POULTRY REVIEW



U.S. Department of Agriculture

Agricultural Marketing Service

Livestock, Poultry and Grain Market News

Angola

Angola's growth rate averaged more than 17% per year from 2004 to 2008. GDP growth for 2013 is estimated at 5.6%. Angola's high growth rate in recent years was driven by high international prices for its oil. Oil production and its supporting activities contribute about 85% of GDP. Diamond exports contribute an additional 5%. Subsistence agriculture provides the main livelihood for most of the people, but half of the country's food is still imported.

Angola: Land use, labor force and GDP

Land use:	GDP: composition, by sector of origin
0.23% permanent crops	Agriculture: 10.2%
3.29% arable	Industry: 61.4%
96.48% other (2011)	Services: 28.4% (2011 est)
Labor Force by occupation:	
Agriculture: 85%	Industry and services: 15% (2003 estimate)
Source: CIA World Factbook	

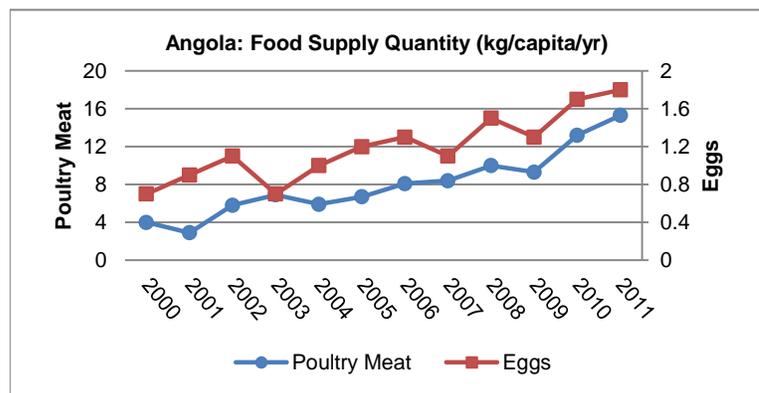
Angola's agricultural sector employs 85% of the labor force, but only accounts for 10.2% of GDP. Most of Angola's agricultural production is subsistence-based and rain-fed, with low productivity levels. Over 90% of all food products in retail stores, restaurants, and hotel business are imported. For fresh meat, several retail chains bring it in through air freight from South Africa, EU, Brazil, Argentina and Uruguay due to the lack of cold storage or reefer plug-in facilities at the port.

Broiler meat production has grown slowly, increasing from 8,000 tons in 2004 to an estimated 26,000 tons in 2015. Imports of broiler meat grew at a faster rate, rising from 85,000 tons in 2004 to an estimated 350,000 tons in 2015. Income growth is strengthening demand; total domestic consumption is expected to reach 376,000 tons in 2015, up 7% from 2014 (350,000 tons).

Angola poultry meat (HS 0207) imports in MT

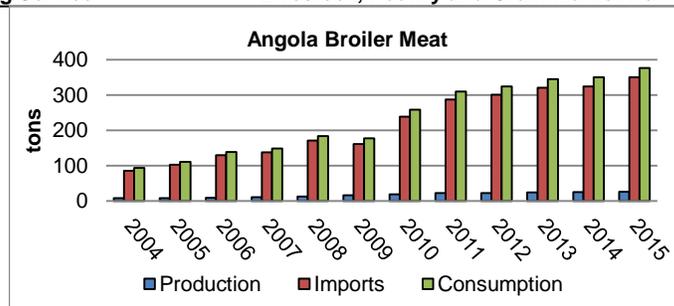
	2010	2011	2012	2013	2013/2012 % chg
USA	140,275	167,044	185,721	209,871	113%
Brazil	112,038	108,815	108,319	100,099	92%
Argentina	3,402	5,449	6,019	9,076	151%
Belgium	11,902	7,689	5,889	6,734	114%
Turkey	800	2,146	4,545	5,879	129%
Portugal	2,389	1,912	3,352	2,916	87%
Italy	2,829	2,652	2,323	1,976	85%
Chile	375	452	1,088	990	91%
France	3,120	1,936	964	987	102%
Netherlands	1,596	1,427	988	976	99%
Ukraine	-	27	135	853	630%
Others	4,173	4,073	4,396	1,894	43%
Total	282,900	303,621	323,740	342,250	106%

Source: DESA/UNSD, United Nations Comtrade database



Source: FAOSTAT | © FAO Statistics Division 2014 | 21 November 2014

Source: CIA World Factbook; UN FAO Angola BEFS Country Brief; UN FAO Food Outlook October 2014; USDA FAS GAIN Report 2/27/2013



Source: Foreign Agricultural Service, Official USDA Estimates

Highly Pathogenic Avian Influenza H5N8

Highly Pathogenic Avian Influenza (HPAI) H5N8 was first reported in Korea on January 17, 2014 followed by: Japan on April 13; China on October 24; Germany on November 6; Netherlands on November 16; and the UK on November 17.

Germany reported an outbreak of H5N8 in fattening turkeys in North East Germany on November 6, 2014. The holding keeps about 31,000 fattening turkeys. The source of the infection is unknown. The Dutch outbreak was reported on November 11 and the British outbreak on November 17; the Dutch outbreak involved 150,000 layer and breeding hens; the British outbreak was on a Yorkshire farm housing 6,000 60-week old breeding ducks.

Autumn is a time with high wild bird migrations, especially waterfowl. There is an increased risk of incursion of avian influenza into the poultry sector through direct and indirect contact with wild birds. Experts hypothesize that the virus may have travelled during the spring season from eastern Asia into the breeding ground of migratory birds in Central Asia; these migratory birds may now be carrying the virus with them as they migrate into more moderate climates.

Since early 2013 several new avian influenza virus strains have been reported in East and Southeast Asia. In March 2013, H7N9 emerged in China; it is of low pathogenicity in birds but can cause lethal pulmonary infection in mammals without prior trans-species adaptation. H10N8 was reported in December 2013, causing three human cases in China; H5N8 emerged the month after and was the cause of at least 40 poultry outbreaks, mainly in the Republic of Korea but also in Japan and China. This was followed by the first reports from China and Lao Peoples Democratic Republic in early May 2014 describing outbreaks in poultry caused by a highly pathogenic H5N6. The finding of a H5N3 subtype was reported for the first time in October 2014 from a live bird market.

New avian influenza virus types and sub-types detected in East and Southeast Asia since early 2013 (as of November 27, 2014)

Type	Country	Poultry outbreaks	First Report
H7N9	China	*	March 2013
H10N7	China	?	December 2013
H5N8	China, Korea, Japan	42	January 2014
H5N6	China, Lao PDR, Viet Nam	34	May 2014
H5N3	China	1	October 2014

*In the absence of clinical signs in poultry the term outbreak cannot be used. However the virus has been found in 132 out of over 600,000 samples collected by the Chinese Ministry of Agriculture from poultry or the environment and 63 environmental samples collected during traceback surveillance of human cases in China between April 2013 and September 2014.

Source: World Organization for Animal Health; WHO/Europe; UN FAO Empress Watch; UN FAO Animal Production and Health; USDA FAS GAIN Report GM14041

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

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

Type	Year-To-Date*			2013
	2014	2013 /1	2014 /2	
Liquid	0	272	6,241	2,032
Frozen	0	0	39	40
Dried	87	0	1,063	159
Total	87	272	7,343	2,231

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

Type	Year-To-Date*			2013
	2014	2013 /1	2014 /2	
Liquid	18	61	5,712	6,069
Frozen	0	8	1,451	1,299
Dried	10	0	241	51
Total	28	69	7,404	7,419

INSPECTED SHELL EGGS

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

	Year-To-Date*			2013
	2014	2013 /1	2014 /2	
Jumbo	0	0	0	0
Extra Large	2,250	6,780	184,386	147,316
Large	8,350	9,150	408,077	299,654
Medium	810	0	23,251	25,325
Ungraded	16,770	31,152	1,071,267	455,052
Misc	0	0	27,322	3,720
Total	28,180	47,082	1,714,303	931,067

/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 Nov 22, 2014 (Preliminary)

	U.S. Fowl Slaughtered Domestically		Total Hens
	Light Hens	Heavy Hens	
	-----Thousands-----		
Head	1,005	1,849	2,854
Last Week	1,004	1,680	2,684
Same week yr ago	1,081	1,303	2,384
To-date/2014*	66,831	73,613	140,444
To-date/2013*	69,015	70,235	139,250

	U.S. Fowl Slaughtered in Canada		Total Hens
	Light Hens	Heavy Hens	
	-----Thousands-----		
Head	262	0	262
Last Week	169	0	169
Same week yr ago	214	0	214
To-date/2014*	17,150	0	17,150
To-date/2013*	15,811	0	15,811

	Total U.S. Fowl Slaughtered in the U.S. and Canada		Total Hens
	Light Hens	Heavy Hens	
	-----Thousands-----		
Head	1,267	1,849	3,116
Last Week	1,173	1,680	2,853
Same week yr ago	1,295	1,303	2,598
To-date/2014*	83,981	73,613	157,594
To-date/2013*	84,826	70,235	155,061

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

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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 of MSC are trending steady to mostly weak on all fat contents. Demand is light to moderate into both domestic and export channels. Supplies are moderate to heavy for current needs. Industry continues to watch the spot marketplace as MSC and frames clear slowly due to the Thanksgiving holiday. Contract negotiations persist for 2015 with more confirmations rolling in each week. Confirmed prices for 2015 are at similar to lower levels than current 2014 contract prices in addition to formula based pricing. Market activity is slow to moderate. Raw material supplies are moderate to heavy. Frame prices are steady to weak with trading levels between 10-12 cents FOB.

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

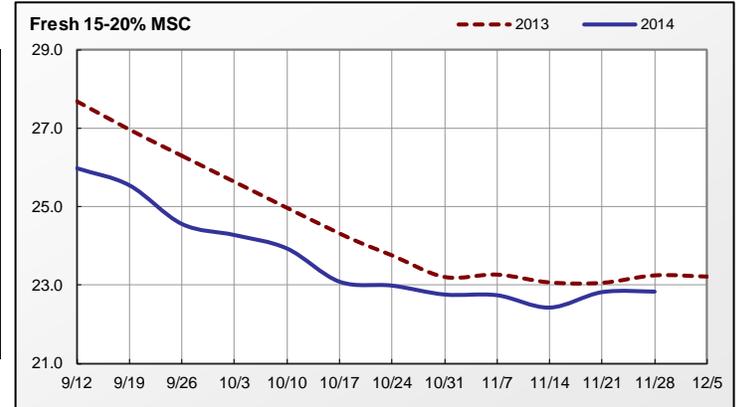
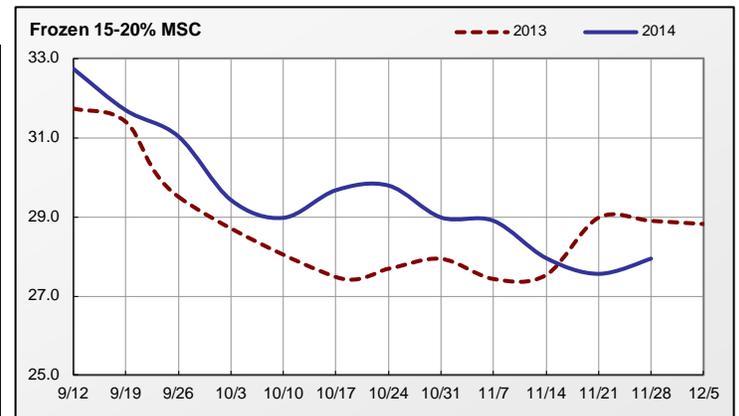
Fat Content	Frozen			Fresh		
	28-Nov-14	Last Week	Last Year	28-Nov-14	Last Week	Last Year
15% or Less						
Price Range	-	-	-	27.00	27.00	27.00-28.00
Wtd Avg Price	-	-	-	27.00	27.00	27.50
Volume Traded	-	-	-	122	61	163
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	25.50 - 31.00	25.50 - 31.00	27.00-31.00	21.00 - 26.00	21.00 - 25.00	19.00-26.00
Wtd Avg Price	27.94	27.56	28.90	22.83	22.82	23.25
Volume Traded	1,085	1,676	1,227	2,784	2,652	2,434
Volume Exported	965	1,676	1,147	898	775	530
20% or More						
Price Range	-	-	-	-	21.00	22.00
Wtd Avg Price	-	-	-	-	21.00	22.00
Volume Traded	-	-	-	-	82	41
Volume Exported	-	-	-	-	-	-

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

Fat Content	Frozen			Fresh		
	Oct 2014	Sep 2014	Oct 2013	Oct 2014	Sep 2014	Oct 2013
15% or Less						
Wtd Avg Price	28.00	32.00	33.00	27.65	32.56	28.17
Volume Traded	108	40	40	469	653	245
Volume Exported	108	-	-	-	-	-
15-20%						
Wtd Avg Price	29.33	32.01	27.60	23.47	25.53	24.01
Volume Traded	9,129	9,665	5,090	13,056	11,483	6,294
Volume Exported	8,529	8,585	4,730	3,264	2,734	1,142
20% or More						
Wtd Avg Price	-	-	-	21.63	22.29	22.00
Volume Traded	-	-	-	326	286	82
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 28 NOVEMBER 2014.

The market is generally steady on most items. Demand light and trading slow in response to most processors running shortened holiday processing schedules and industry members taking time off today. Offerings light to moderate. For domestic: tails 64, tom machine defatted gizzards 96 cents delivered. For export: fresh tom drums 102-103 cents delivered to the Border.

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
FRIDAY, NOVEMBER 28, 2014						
DRUMSTICKS, TOMS		W	105.00	40	105.00	40
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		W	56.00	108	56.00	108
MECHANICALLY SEPARATED 2/	24.00-25.00		24.50	80	25.81	350
THIGH MEAT - FROZEN	160.00-161.00		160.50	80	160.83	240

No trading reported on Thursday, November 27, 2014 - due to Thanksgiving Day Holiday.

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
WEDNESDAY, NOVEMBER 26, 2014				
DRUMSTICKS, TOMS	105.00		105.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	56.00		56.00	108
MECHANICALLY SEPARATED 2/	25.00-27.00		26.20	270
THIGH MEAT - FROZEN	164.00		164.00	40

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
TUESDAY, NOVEMBER 25, 2014				
DRUMSTICKS, TOMS		R	112.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	57.00	20
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN	160.00		160.00	120

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
MONDAY, NOVEMBER 24, 2014				
DRUMSTICKS, TOMS		R	112.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	57.00	20
MECHANICALLY SEPARATED 2/				
THIGH MEAT - FROZEN		F	151.45	440

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.