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Livestock, Poultry and Grain Market News

Uruguay Grants Full Market Access for U.S. Poultry Products

On April 21, 2014, Uruguay granted final approval for importing U.S. fresh and frozen poultry and poultry products (including U.S. fresh chicken). Following several years of technical discussions, USDA representatives from APHIS and FSIS reached agreement with Uruguay on the sanitary measures for U.S. poultry products. Access to Uruguay had been previously limited to U.S. fresh and frozen turkey meat for a seasonal market and U.S. cooked (processed) chicken meat. U.S. poultry exports to Uruguay were valued at \$250,000 in 2013 (up from \$130,000 in 2012), with potential to expand further under this new agreement.

Source: <http://www.aphis.usda.gov/>

Outlook for Poultry Production, Supply and Demand in kilotons

	2013	2014	2015	2016	2017	2018	2019	2020
Production	57.8	59.3	62.1	62.9	63.7	64.3	64.7	65.1
Imports	3.7	3.6	3.4	3.5	3.5	3.7	3.8	4.1
Exports	13.3	13.6	14.8	14.5	14	13.4	12.7	11.9
Consumption	48.2	49.4	50.6	51.9	53.2	54.5	55.9	57.3

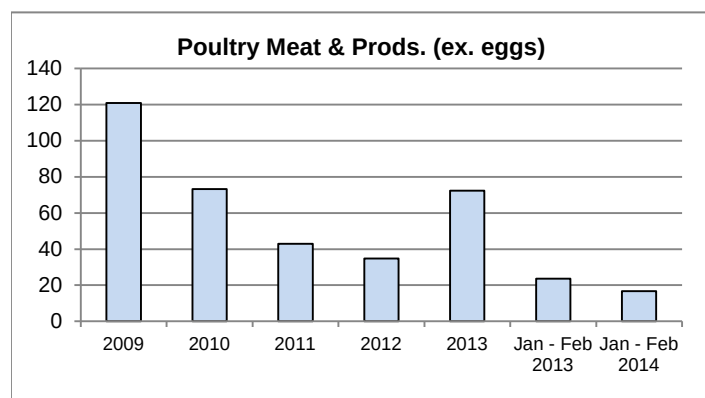
Source: OECD-FAO Agricultural Outlook 2013-2022, © OECD

<http://www.oecd.org/site/oecd-faoagriculturaloutlook/>

2012-2013 Annual Meat Consumption in kilograms per capita

	2009	2010	2011	2012	2013	% change
Beef	58.2	61.2	60.6	60.0	59.4	-0.6
Lamb	5.8	4.5	4.1	4.0	4.3	0.3
Pork	8.6	9.7	10.5	14.0	16.8	2.8
Poultry	19.0	19.0	19.5	20.0	20.7	0.7
Total	91.6	94.4	94.7	98.0	101.2	3.2

http://www.inac.gub.uy/innovaportal/file/9200/1/mercado_interno_cierra_ano_2013.pdf



HS codes 0207, 160100, 160232

Data Source: U.S. Census Bureau Trade Data

U.S. exports of eggs and egg products to Uruguay are very light, most consisting of processed/cooked bird eggs in shell.

U.S. Exports of Eggs and Egg Products to Uruguay

HS Code	UOM	2011	2012	2013	January-February	
					2013	2014
407900000	dozens	2.8	0.0	3,660.0	840.0	2,490.0
408990000	metric tons	0.0	3.6	4.4	4.4	0.0
408190000	metric tons	0.0	0.0	1.7	1.7	0.0

UOM – Unit of measure

407900000 - Bird eggs, processed/cooked (in shell)

408990000 - Bird egg no/shell, fresh

408190000 - Egg yolk, fresh, frozen, cooked

Data Source: U.S. Census Bureau Trade Data

Uruguay

Uruguay is a small country with a population of 3.3 million, nearly half of which is concentrated in its capital city, Montevideo. Around 95% of the total population resides in urban areas.

The Uruguayan economy has grown steadily since its recovery from a deep economic and financial crisis that struck the country in 2002. Annual average growth rates of 6.5% (2004-2008) made Uruguay one of the fastest growing economies in Latin America. World economic slowdown brought lower rates of around 3% for 2009, peaking at 8.9% in 2010 and declining again in 2011 (6.5%), 2012 (3.9%) and 2013 (3.5%). Domestic consumption has fueled the economy, bolstered by an increase in incomes, a stable employment rate and easily accessible consumer credit.

Meat represents a high percentage of the population's diet as well as prepared meats and sausages. The strong competition of cheaper poultry continues and, based on consumption levels in neighboring countries; it still has significant room to grow. In 2013 the per capita consumption of beef was at 59.4 kilos, poultry 20.7 kilos, pork 16.8 kilos and lamb 4.3 kilos (mainly consumed on-farm).

Source: USDA FAS GAIN Report *Uruguay Food Exporters Guide*

Uruguay Poultry Meat and Products Exports and Imports

Uruguay Poultry Meat Exports (HS 0207)

Period	US\$ FOB	Net Weight (kg)
1/2014 Until 2/2014	5,036,873	2,402,093
1/2013 Until 12/2013	23,925,958	13,174,488
1/2012 Until 12/2012	27,510,479	15,816,476
1/2011 Until 12/2011	22,531,483	12,942,617

0207 - Meat and edible offal, of the poultry of heading No 0105, fresh, chilled or frozen

Uruguay's major markets for poultry meat by net weight in 2013 were Venezuela (9,699,927 kg), Congo (693,390 kg), and Hong Kong (661,673 kg).

Uruguay Poultry Meat Imports (HS 1602)

Period	US\$ FOB	Net Weight (kg)
1/2014 Until 2/2014	1,279,049	483,828
1/2013 Until 12/2013	7,182,308	2,847,614
1/2012 Until 12/2012	6,133,937	2,116,292
1/2011 Until 12/2011	4,671,454	1,649,808

16023100 - Prepared preserved edible, of turkey Until 16023900 - Prepared preserved edible, of other birds

Brazil is the major supplier of prepared/cooked/preserved poultry meat, accounting for 2,226,849 kg out of a total of 2,847,614 kg in 2013.

Uruguay Poultry Meat Imports (HS 0207)

Period	US\$ FOB	Net Weight (kg)
1/2014 Until 2/2014	0	0
1/2013 Until 12/2013	144,304	31,369
1/2012 Until 12/2012	113,743	16,935
1/2011 Until 12/2011	53,074	5,829

0207 - Meat and edible offal, of the poultry of heading No 0105, fresh, chilled or frozen

Uruguay primarily imports turkey meat from the United States. In 2013 imports of turkey meat from the U.S. totaled 23,502 kg.

Data Source: <http://alicewebmercosul.desenvolvimento.gov.br>

INSPECTED EGG PRODUCTS-U.S. & CANADA IMPORT/EXPORT TRADE**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending Apr 26, 2014

Year-To-Date*

Type	2014	2013 /1	2014 /2	2013
Liquid	0	0	2,185	616
Frozen	0	0	39	0
Dried	0	0	158	56
Total	0	0	2,382	672

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

Week Ending Apr 26, 2014

Year-To-Date*

Type	2014	2013 /1	2014 /2	2013
Liquid	29	273	2,183	3,336
Frozen	6	47	441	479
Dried	0	0	46	0
Total	35	320	2,670	3,815

INSPECTED SHELL EGGS**U.S Exports to Canada, in 30-Dozen Cases (Preliminary)**

Week Ending Apr 26, 2014

Year-To-Date*

Type	2014	2013 /1	2014 /2	2013
Jumbo	0	0	0	0
Extra Large	4,009	0	49,147	31,865
Large	11,291	5,080	107,131	68,670
Medium	780	780	5,322	11,643
Ungraded	20,016	11,691	260,564	74,240
Misc	2,160	0	11,640	0
Total	38,256	17,551	433,804	186,418

/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 26, 2014 (Preliminary)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
	-----Thousands-----		
Head	1,407	1,456	2,863
Last Week	1,378	1,495	2,873
Same week yr ago	2,061	1,471	3,532
To-date/2014*	25,442	24,751	50,193
To-date/2013*	27,968	23,988	51,956

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
	-----Thousands-----		
Head	601	0	601
Last Week	475	0	475
Same week yr ago	464	0	464
To-date/2014*	6,271	0	6,271
To-date/2013*	6,123	0	6,123

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	2,008	1,456	3,464
Last Week	1,853	1,495	3,348
Same week yr ago	2,525	1,471	3,996
To-date/2014*	31,713	24,751	56,464
To-date/2013*	34,091	23,988	58,079

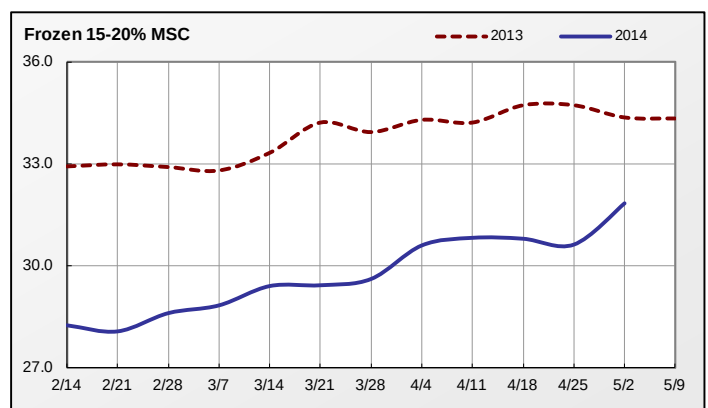
*Note: Year to-date totals reflect comparable time periods.

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.)

MSC prices are steady to firm on all fat contents. Demand into domestic and export channels is mostly moderate; Mexico is light. Supplies are light to moderate. Schedules are mostly normal with a few disruptions noted. The spot marketplace is a mix of sporadic activity, but overall just moderate as industry watches for any new developments. Producers are keeping MSC and frame supplies in good balance as they continue to test prices; however prices continue to hover in the same range. Finished product movement is generally average for most. Market activity is moderate. Supplies of raw materials are light to moderate. Frame prices are firm with trading levels between 14-16 cents FOB.

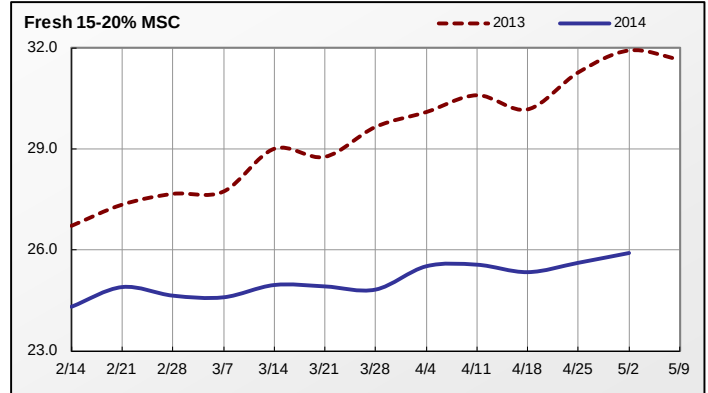
Weekly MSC Weighted Average Prices (cents/pound) and Volumes (1,000 pounds)

Fat Content	Frozen			Fresh		
	2-May-14	Last Week	Last Year	2-May-14	Last Week	Last Year
15% or Less						
Price Range	31.00	-	32.00	27.00 - 28.00	28.00	29.00-31.00
Wtd Avg Price	31.00	-	32.00	27.71	28.00	30.20
Volume Traded	40	-	40	143	41	204
Volume Exported	-	-	-	-	-	-
15-20%						
Price Range	30.00 - 36.00	29.00 - 34.00	32.00-38.00	24.00 - 28.00	24.00 - 28.00	28.50-33.00
Wtd Avg Price	31.84	30.63	34.73	25.91	25.62	30.18
Volume Traded	1,375	1,706	1,825	3,257	2,652	3,835
Volume Exported	1,215	825	1,545	204	367	530
20% or More						
Price Range	-	-	-	22.50	22.50	22.00
Wtd Avg Price	-	-	-	22.50	22.50	22.00
Volume Traded	-	-	-	82	82	82
Volume Exported	-	-	-	-	-	-

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

Fat Content	Frozen			Fresh		
	Apr 2014	Mar 2014	Apr 2013	Apr 2014	Mar 2014	Apr 2013
15% or Less						
Wtd Avg Price	31.00	31.00	32.00	27.69	27.76	30.29
Volume Traded	80	80	40	530	673	775
Volume Exported	-	-	-	-	-	-
15-20%						
Wtd Avg Price	30.71	29.37	34.54	25.51	24.81	30.55
Volume Traded	6,926	5,930	8,831	12,069	11,854	20,114
Volume Exported	5,605	5,690	8,191	1,754	1,703	1,428
20% or More						
Wtd Avg Price	-	-	-	22.39	22.36	22.14
Volume Traded	-	-	-	367	449	286
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 02 MAY 2014.

The market on white meat and white trims is steady to firm with higher fresh tom breast meat prices reported. Demand moderate to good. Offerings light at best. The market on bone-in breasts is steady to firm. Demand light to good, mostly light to moderate. Offerings very light to light. The market on tom 2-joint wings is steady to instances firm, balance of tom bulk parts market steady. Demand light to good, mostly moderate. Offerings very light to light. The thigh meat market is steady. Demand moderate. Offerings light to instances moderate. Trading light to moderate. For domestic: livers 24 fob pet food, tails 58 fob, Grade A non-basted rib breasts: 12-16 lb. 181, 20-22 lb. 192; fresh tom full-cut wings 73, fresh scapula 176.75-184 cents delivered. For export: fresh tom drums 89, fresh thigh meat 168 cents delivered.

EXPORT TRADING

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
FRIDAY, MAY 02, 2014						
DRUMSTICKS, TOMS		F	93.67	324		
WINGS FULL-CUT - TOMS		M	78.00	108	78.00	108
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M	174.00	108	174.00	108
THURSDAY, MAY 01, 2014						
DRUMSTICKS, TOMS		F	93.67	324		
WINGS FULL-CUT - TOMS		M	78.00	108		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M	174.00	108		
WEDNESDAY, APRIL 30, 2014						
DRUMSTICKS, TOMS						
WINGS FULL-CUT - TOMS		F	93.67	324		
WINGS, V-TYPE, TOM		M	78.00	108		
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN						
TUESDAY, APRIL 29, 2014						
DRUMSTICKS, TOMS		F	93.67	324		
WINGS FULL-CUT - TOMS		M	78.00	108		
WINGS, V-TYPE, TOM						
TAILS						
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		M	174.00	108		
MONDAY, APRIL 28, 2014						
DRUMSTICKS, TOMS		F	93.67	324		
WINGS FULL-CUT - TOMS	78.00		78.00	108		
WINGS, V-TYPE, TOM		M	68.00	108		
TAILS		M	59.50	11		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	174.00		174.00	108		

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.