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Mexico

POULTRY AND PRODUCTS ANNUAL

2009 Annual Poultry and Products Report

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Report Highlights:

Mexican poultry production is forecast to grow through MY 2010, despite facing its first reduction in MY 2009 (Jan-Dec). Economic crisis, lower family income and the H1N1 flu outbreak affected and will continue to affect the sector. Imports of U.S. poultry and poultry products are forecast to increase in response to growing demand, but at a slower rate then in years past and the composition of import products will change.

Executive Summary:

While the entire Mexican GDP is declining the agriculture GDP is increasing and the Mexican poultry sector has an opportunity to expand. In 2010, the Mexican consumer will enjoy chicken, turkey and egg products at competitive prices. Furthermore, chicken will be the leading meat produced within Mexico.

Chicken meat production is expected to increase in 2010, however it is anticipated to decline 1.5 percent in 2009, such a decline has not occurred for over a decade. This decline is primarily attributed to the economic crisis, industry consolidation, imported grain prices, and continued competition from poultry imports.

Mexico lacks an equivalency agreement with USDA (Food Safety and Inspection Service) which would, allow for the export of domestically produced poultry meat and egg products to the United States, although efforts continue toward developing such an agreement.

Imports of frozen mechanically separated meat and cuts for further processing have declined, due to the volatility of the exchange rate. Although, another factor is the imposed import bans on products from regions of the United States due to a low-pathogenic avian influenza (LPAI) outbreaks. This year exports from counties within Kentucky, Tennessee and Minnesota were banned from exporting product to Mexico

Note: Data included in this report are not official USDA data. Official USDA data are available at http://www.fas.usda.gov/psdonlineonline

Commodities:

Poultry, Meat, Broiler
Poultry, Meat, Turkey

Production:

For 2008, the Mexican poultry sector contributed the following to the Mexican economy:

- Poultry production generated 1.14 million jobs, from which 190,000 are direct and 950,000 are indirect.
- Poultry production represents 11.5 percent of the gross agricultural product.

The Mexican poultry sector produces the number one meat product, chicken, and is principally produced within 14 states. Chicken meat represents 92 percent of the total poultry production. Turkey meat production in Mexico is principally produced in 2 states: Chihuahua (25 percent) and Yucatan (21 percent). These two states account for approximately 46 percent of the total turkey meat production of Mexico.

Poultry producers continue to be major users of imported feedstuffs from the United States. According to the Mexican Poultry Producers Association (UNA), feed consumption for MY 2008 was estimated at 13.7 Million Metric Tons (MMT), (8.6 MMT of feed grains, 2.7 MMT of oilseeds and protein meals, and 2.3 MMT of other raw materials). UNA estimates that feed consumption will grow about 1.5 percent in MY 2009. Furthermore, chicken meat production consumed 7.6 MMT of feed while turkey production consumed 52 thousand tons.

The second semester of CY 2009 is expected to be difficult for the poultry sector due to the economic crisis, lower family income and the instability of the exchange rate. Sixty-five to seventy percent of the cost of production in Mexico is tied to the dollar; thus, the devaluation of the peso directly affects the profitability of the sector. Feed costs in Mexico represented approximately 67 percent of the total cost of production.

Chicken Meat

Mexican chicken meat production is forecast to increase for MY 2010 (Jan-Dec) 2.5 percent. This forecast is dependent on the dollar exchange rate, the recovery from economic crisis, and exports. MY 2009 production was revised 0.5 percent higher than the previous forecast. Overproduction is expected to occur in the second half of 2009 due to improvements in productivity which have occurred over the recent past.

Chicken production for MY 2008 was revised upward (1.75 percent) according to UNA data. Overproduction in 2008 and the economic crisis will result in a production decline of 1.5 percent in 2009.

Industry consolidation is expected to continue. Furthermore, the industry continues to invest in infrastructure despite the economic down town. More consolidation is taking place in an effort to cope with high input prices. In 2008, three leading companies accounted for 55 percent of total domestic production of chicken meat. Medium-size companies will likely merge into cooperatives and associations, with smaller players becoming contract producers.

Table 3. Mexico: Concentration of Chicken Production

Table 3. Mexico: Concentration of Chicken Production				
	COMPANIES		% SHARE OF PRODUCTION	
SIZE*	1996	2008	1996	2008
LARGE	2	3	33	55
MEDIUM	27	28	40	41
SMALL	181	150	27	4

Source: National Poultry Union (UNA)

* GOM classifies a small company as having no more than 100 employees; a medium company has from 100 to 250 employees, and a large company has more than 250 employees.

In 2008, there were 21 Federal Inspection Facilities (TIF) and more are coming online focusing on value added chicken products. According to UNA data, in 2008, 764 million birds were slaughtered in TIFs, an increase of approximately 16 percent since 1994.

Table 4. Mexico: 2008 Poultry Slaughter By State

Table 4. Mexico: 2008 Poultry Slaughtering By State		
State	Number of heads (millions)	% Participation Total slaughter
Jalisco	126.9	16.6
Comarca Lagunera	105.7	13.8
Queretaro	92.7	12.1
Puebla	85.9	11.2
Sinaloa	75.6	9.9
Yucatan	53.2	7.0
Nuevo Leon	46.8	6.1
Guanajuato	41.9	5.5

Hidalgo	39.0	5.1
Chiapas	35.5	4.7
Aguascalientes	26.6	3.5
San Luis Potosi	19.5	2.5
Sonora	7.5	1.0
Nayarit	3.1	0.4
Chihuahua	2.5	0.3
Veracruz	1.6	0.2
Total	**764.2**	**100.0**

Source: National Poultry Union (UNA)

Grow-out period/Genetics

The average bird grow-out period depends largely on where and how the bird will be sold. For live birds and whole chickens (New York dressed), which are commonly sold in street markets, the average grow-out period is 49-56 days. Birds for the RTC broiler market have an average grow-out period of 40-44 days. Those grown for sale in supermarkets (RTC and chicken cuts) are typically grown-out in 44-49 days. The average daily gain is 36-44 grams per bird. The average bird weight when marketed is on average 2.2 kg. The poultry industry reports that the average feed conversion ratio is 2:1.

Genetics are usually sourced from the United States. The main chicken genetics present in the flocks in Mexico are Ross (78 percent) and Cobb (19 percent). The main turkey breeding flocks in Mexico are Nicolas with 75 percent and Hybrid (Hendrix Genetics) with 25 percent. Producers import almost all of the grandparent and parent stock and are also importing fertile eggs for light and heavy breeders.

Turkey Meat

Turkey meat production for MY 2010 (Jan-Dec) is forecast to increase to 15,200 MT as demand for turkey meat continues to strengthen. Meat production for MY 2009 is estimated at 14,800 MT, a slight decrease (1.16 percent) from MY 2008. Domestic producers continue to face competition from U.S. and Chilean imports, however; from January to May 2009 turkey imports declined approximately 22.5 percent. Domestic turkey meat production represents less than 10 percent of total poultry meat consumption, and domestic firms sell about 75 percent of their production as uncooked whole turkeys for the Christmas season. The balance is sold as domestic turkey cuts and further-processed products such as turkey patties, nuggets, cold cuts, turkey hams, hot dogs, and oven-cooked turkey legs.

Most turkey is produced in the states of Chihuahua (25 percent), Yucatan (21 percent), and Puebla (10 percent) which represents 56 percent of the total Mexican turkey production.

Consumption:

In spite of the economic crisis, consumers are becoming more health conscious and changing diets to include lighter and healthier food choices which include more poultry products; thus, for 2010 turkey and chicken consumption is estimated to increase. According to INEGI [1] , in 2008 gross family income decreased 0.9 percent due to the economic crisis; however, poultry products, especially turkey products, enjoyed favorable demand, and consumption is still growing.

Within Mexico, per-capita consumption of chicken is approximately 25.47 kg, and of turkey is 1.97 kg per year.

Chicken Meat

Chicken producers will continue to enjoy the same demand for their products due to the affordability of chicken relative to other meats, furthermore, increased usage in processed food products, along with improved product quality, will continue to support poultry consumption. For 2010 chicken consumption is expected to increase 2.31 percent, principally value added products and chicken cuts. However, the consumption for 2009 will not only remain steady, but also consumers prefer cheaper priced fresh whole chickens instead of chicken cuts because of the reduction in family income; furthermore, a lower demand for chicken leg quarters (CLQ's) is expected because of an increase in consumer prices. In contrast in 2008 purchases of chicken cuts increased slowly.

According to industry information, broiler chickens (RTC) account for 26 percent of chicken meat consumption, while chickens sold in wet markets and stalls (roasters New York dressed) account for approximately 21 percent of the total. Live birds represent 27 percent of total chicken meat consumption. Live chicken sales which have been trending downward for the past six years increased one percent this year. Chicken meat consumption purchased in supermarkets increased from 7 to 12 percent in 2008 (broiler and roasters RTC), and chicken cuts account for 10 percent of total consumption. Value-added products account for about 4 percent of total consumption, which is a 3 percent decline from last year.

Prices

In spite of the H1N1 flu outbreak and the increase seasonal demand of chicken and turkey meat, because of the Lenten season[2] , the price of broiler declined along with chicken leg quarters in the first months of 2009. See tables 5 and 6 of this report.

For the third quarter of 2008, the price of CLQs was down as a result of lower production costs, the economic crisis and a higher exchange rate. Since then, prices have recovered although 2009 continues to be a volatile year. The first quarter of 2009, the price of CLQs was significantly higher compared to the first quarter of 2008 but, the price of CLQs declined during the second quarter.

Table 5. Mexico: Mexico City broiler wet market monthly prices 2006-2009, pesos/kilogram

Table 5. Mexico: Mexico City Broiler[1] Wet Market monthly Prices 2006-2008 Pesos/kilogram					
Month	2006	2007	2008	2009	% Change 08/09
January	23.04	27.00	19.05	22.14	16.22
February	22.50	24.50	20.08	22.65	12.79
March	22.73	21.00	22.38	23.20	3.66
April	19.25	21.22	25.20	22.91	(9.08)
May	26.50	22.96	26.79	22.72	(15.19)
June	19.00	26.13	22.39	22.23	(0.26)
July	20.33	22.50	22.29	20.27	(9.06)
August	20.58	23.91	21.63	N/A	N/A
September	21.50	24.86	22.22	N/A	N/A

October	21.25	25.67	25.84	N/A	N/A
November	20.48	30.06	24.80	N/A	N/A
December	23.58	24.42	24.30	N/A	N/A
Annual Avg.	**21.73**	**24.52**	**23.08**	**22.30**	**N/A**
① Whole chicken including offal					

Source: National Poultry Union (UNA)

Table 6. Mexico: Mexico City Chicken Leg Quarter Wholesale Monthly Prices 2006-2009, Pesos/Kilogram

Table 6. Mexico: Mexico City Chicken Leg Quarter Wholesale monhtly Prices 2006-2009 Pesos/kilogram					
Month	**2006**	**2007**	**2008**	**2009**	**% Change 08/09**
January	17.00	21.06	22.05	27.52	24.80
February	17.96	20.61	20.79	27.78	33.62
March	18.91	18.23	20.83	28.42	36.43
April	18.30	19.99	22.22	23.55	5.98
May	20.87	25.07	25.24	26.10	3.40
June	24.66	23.81	25.85	26.90	4.06
July	18.57	23.99	21.83	23.52	7.74
August	22.42	24.78	20.26	N/A	N/A
September	20.05	23.65	19.26	N/A	N/A
October	20.00	20.50	20.85	N/A	N/A
November	21.66	23.79	23.79	N/A	N/A
December	24.50	24.46	26.29	N/A	N/A
Annual Avg.	**20.41**	**22.49**	**22.43**	**26.25**	N/A

Source: National information market service, (SNIIM)

2006 Exchange Rate Avg.: U.S. $1.00 = 10.90 pesos

2007 Exchange Rate Avg.: U.S. $1.00 = 10.92 pesos

2008 Exchange Rate Avg.: U.S. $1.00 = 11.15 pesos

2009 (Jan-Jul) Exchange Rate Avg.: U.S. $1.00 = 13.78 pesos

Turkey Meat

Turkey meat consumption for MY 2010 is forecast to increase 0.5 percent to 221,000 MT owing to the availability of cheaper turkey processed products. Due to the economic down turn, the 2009 estimate has been revised down from the previous estimate. MY 2008 consumption was revised to reflect industry data.

Consumption of turkey meat in the form of cold cuts continues to increase primarily through sales in supermarkets and delicatessen-type restaurants. Cooked hams made from blends of domestic pork and U.S. turkey thigh meats are substantially cheaper than all-pork cooked hams.

Most whole turkey demand occurs during the Christmas season. The average bird weight when marketed is on average 15 pounds. Industry sources report that consumption patterns for turkey and turkey products are changing as consumers become increasingly health conscious with food habits.

[1] INEGI= Instituto Nacional de Estadistica, Geografia e Informatica. The U.S. equivalent USDA, National Agricultural Statistics Service.
[2] In Mexico during Lent poultry meat is the only acceptable meat product for consumption; only red meat is prohibited during this period.

Trade:

The most important poultry meat imported by Mexico is CLQ´s to be sold in supermarkets. While the processing industry imports most mechanically deboned poultry, chicken and turkey (MDC & MDT), and poultry cuts as inputs for the domestic sausage and cold-cut industries. Large meat processors prefer fresh, refrigerated product, while small and medium processors tend to use frozen product.

The top three products imported by Mexico are fresh or chilled mechanically deboned chicken meat, fresh and chilled turkey parts, and frozen chicken leg quarters, although, imports of poultry products are increasingly diversified. Recently, imports of whole chickens principally for the self-service supermarkets have occurred. Supermarkets import a higher quantity of cuts when prices in the U.S. are cheaper than in the domestic market (i.e., thighs, leg quarters and drumsticks **[1]**).

The United States is the main supplier of imports to Mexico, approximately 90 percent. Currently, the only other competitor in this market is Chile with approximately 10 percent of imports.

On the other hand, Mexico exported $1.7 million dollars of poultry and poultry products to the world in 2008, primary destinations were countries within Africa. The leading exported product is table eggs, which accounted for 69 percent of all exports.

Chicken Meat

Imports of chicken cuts, mainly leg quarters, and mechanically separated chicken for MY 2010 are forecast to increase due to rising consumer demand and the demand from the processing industry but, at a slower pace. In spite of the economic crisis, imports for 2009 will increase approximately 12 percent; however, the composition of imports is changing. Whole chicken (fresh and frozen) imports have increased about 50 percent; in contrast the imports of MDC have declined. Imports are affected primarily by the exchange rate but, Mexican processors are seeking and sourcing products domestically.

Imports of chicken meat for MY 2008 were revised to reflect official data.

At the beginning of year, the meat processing industry expected to import more raw materials such as mechanically separated chicken and turkey meat due to higher demand for cheaper meat inputs for the production of such items as mortadella, sausage, pastry or hams. However, a volatile exchange rate has reduced the importation of MDC from the United States but, not from Chile. Chile's exports of MDC increased 120 percent for the first 5 months of 2009 compared to the same period of 2008.

U.S. exports continue to be restricted by import bans imposed by Mexico for sanitary conditions. This year, Mexico has imposed import bans for poultry and poultry products produced within the county of Edmonson in Kentucky, the counties of Giles and Lincoln in Tennessee and the county of Meeker in

Minnesota due to an outbreak of low-pathogenic avian influenza (LPAI). (See GAIN reports MX9022 and MX9034).

Table 7 summarizes some of the regulations currently implemented by the Mexican government for imports of live poultry and poultry meat from the United States.

Table 7. Mexico: Current Import Regulations for Poultry and Poultry Products.

Table 7. Mexico: Current Import Regulations for Poultry and Poultry Products

ITEM	RAW POULTRY FOR RETAIL & FOR FURTHER PROCESSING*	FULLY COOKED POULTRY MEAT AND EGG PRODUCTS	TABLE, SPF** AND HATCHING EGGS	LIVE BIRDS
Export Status from All U.S. States **1/**	YES❺	YES	YES ❶❺	YES❺
Required Language On Cleaning And Disinfection Of Trucks	YES	NO	YES	YES
Required Sealing Of Trucks At Point Of Origin	NO	NO	NO	YES
Required Language that Product is Fit for Human Consumption and Freely Marketed in the U.S.	YES	NO	❷	❷
Agar Gel or ELISA Test Required	❸	NO	❸	❸
Certification Requirements On Exotic Newcastle Disease ❹	YES	YES	YES	YES

***** MDM and cut exports are only approved to proceed to Federal Inspected Plant (TIF) meat processing facilities authorized by SAGARPA.

****** SPF, Specific Pathogen Free

1/ The exports of poultry products and by-products from the State of Arkansas, that come from birds slaughtered between May 10 until July 14, 2008 remains prohibited.

❶ Boxes of table eggs as well as SPF eggs must show the stamp of the competent authority.

❷ SPF, hatching eggs and live birds should be freely marketed in the U.S.

❸ When a plant and farm/flock is registered under the National Poultry Improvement Plan (NPIP), the Agar Gel or ELISA test will not be required; otherwise the tests will be required by SAGARPA.

❹ Exotic Newcastle Disease statement for meat, meat products and by products. - "That the product comes from flocks that have a monitoring program of 70 birds that began after 12 days of age, using viral isolation tests and identification of velogenic strains through a test that indicates intracerebral pathogenicity in chicks of one day of age and that is carried out for each lot that is delivered for slaughter, obtaining negative results for Velogenic Newcastle disease, or that comes from a country free of Velogenic Newcastle Disease."

❺Imports of live birds, fresh eggs, poultry meat products and by products chilled and /or frozen are prohibited by the Mexican Government Authorities:
As of March 9, 2009, from Edmonson County, Kentucky
As of April 3, 2009, from Giles County, Tennessee
As of April 10, 2009, from Lincoln County, Tennessee
As of July 5, 2009, from Meeker County, Minnesota

For additional information regarding poultry meat and egg products exports to Mexico see the FSIS Export Library at http://www.fsis.usda.gov/Regulations_&_Policies/Mexico_Requirements/index.asp
(Export Requirements for meat and poultry products).

The Mexican phyto-zoo-sanitary requirements sheets (HRZ's) for each kind of imported product to Mexico are

available at http://148.245.191.4/zooweb/inicio.aspx **Source**: SAGARPA/SENASICA/Animal Health Directorate.

Exports of Mexican chicken meat have increased slowly; furthermore, 2008 estimates have been revised to reflect official data. Exports consist of value added products such as ready-to-eat products (RTE) produced from imported U.S raw materials.

Turkey Meat

MY 2010 turkey meat imports are forecast to increase to 206,000 MT, only a 0.5 percent increase, as demand for turkey cuts for further processing is expected to grow. A similar small increase is expected for 2009 due to higher international prices as a result of the volatile exchange rate.

The MY 2008 import estimate was revised downward based on final trade data.

The United States is the main supplier of turkey meat in Mexico; however, Chile's presence in the poultry market is expected to continue growing as Mexican importers seek to diversify suppliers, but only if no sanitary outbreak occur in Chile. Chilean products are competitively priced and suitable for processors who are willing to work with frozen product. Chilean poultry imports are duty free under the Mexico-Chile Free Trade Agreement.

In 2008, turkey meat imports were 66 percent fresh parts, 26 percent frozen parts, 5 percent whole, and 2 percent smoked.

[1] Source: Georgia Department of Agriculture, prices compared from Sept 2008 to January 2009. http://agr.georgia.gov/00article/0,2086,38902732_0_40311595,00.html

Policy:

Chicken and Turkey Meat

The Mexican import requirements for poultry and poultry products are outlined in the Zoosanitary Import Requirement Sheets (HRZ). Currently raw poultry imports are to comply with one of two options regarding Avian Influenza (AI) testing: a) a negative result on 59 samples to AGID or ELISA tests or; b) that the flock/farm of origin is recorded in the U.S. National Poultry Improvement Plan (NPIP). SAGARPA and USDA agreed that the NPIP would be deemed as an equivalent program to the regulation NOM-044-ZOO-1995 "National Campaign against Avian Influenza" that was modified and implemented on August 14, 2006. However, on August 17, 2009, SAGARPA informed USDA the NPIP would not meet the AI testing requirements for breaking eggs. Currently, USDA and SAGARPA are holding technical discussions to address the concerns of SAGARPA regarding the possible AI risk this product presents to Mexico.

Domestic poultry producers have faced difficult times with the increased grain prices, the peso devaluation and most recently the economic crisis. Domestic producers have been looking for alternative financing options to avoid or minimize the effects of the markets on their revenue streams. In addition, domestic producers continue to invest in improving sanitary standards within their flocks and conditions within slaughtering facilities. Furthermore, efforts continue to obtain USDA recognition of disease-free areas within Mexico.

SAGARPA is developing a program of modernization of import inspection procedures at the borders, which could be published or implemented on November 1, 2009. These new procedures are not only a part of a plan to modernize inspection procedure, but also an effort to harmonize import procedures with NAFTA partners.
In addition, COFEMER (counterpart to the U.S. Office of Management and Budget) is reviewing new proposed regulations to the Animal Health Law. By the end of the year a draft proposal of these regulations may be published in the Federal Register. These regulations will outline the import procedures for import inspections by SAGARPA at the border for imported meat and meat products.

Recently, actions by the Secretariat of Health, specifically COFEPRIS [1], have indicated existence of a turf war over food safety within the Mexican Government. COFEPRIS has raised concerns with the importation of eggs, citing its authority within the import requirements of NOM-159-SSA-1996. Its concerns dealt with the cold chain processes for these imported eggs.

[1] COFEPRIS: Federal Commission for Sanitary Risk Protection. U.S. equivalent is the Food and Drug Administration.

Marketing:

Chicken and Turkey Meat

Most poultry meat in Mexico is sold as whole birds, although sales of chilled or refrigerated poultry cuts are continuing to increase, principally through supermarkets. The share of supermarket sales is expected to grow as consumers increasingly accept poultry cuts and other RTE poultry products.

Around 75 percent of Mexican turkey production is marketed during the Christmas season as whole turkeys, and approximately 25 percent is sold as cut-up and further processed turkey meat products. The USA Poultry & Egg Export Council (USAPEEC), along with local turkey producers and meat processors, has sponsored generic marketing campaigns to increase overall consumption of selected turkey products and processed products in Mexico.

USAPEEC's Mexico office has actively promoted poultry products in various large retail and food service exhibitions within USDA/Agricultural Trade Show Pavilions like Antad and Abastur. For cooked and processed poultry products, USAPEEC has also participated in Expohotel and Expo-Agroalimentaria. USAPEEC will continue to support marketing strategies within the NAFTA Egg and Poultry Partnership (NEPP), which promotes the exchange of information and technical expertise between both the U.S. and Mexican poultry industries. Last year, USAPEEC and UNA collaborated on a project to promote hard-boiled eggs as a snack. The development and testing of the marketing slogan "snack of the future" have yielded beneficial results. USAPEEC and UNA continue to develop a positioning strategy for the snack and intent to compete with high-carbohydrate and fatty-food products.

UNA will continue domestic investments in marketing and promotion of poultry meat. UNA plans to develop strategies in a collaborative effort with the National Poultry Institute (NPI) to educate consumers on the benefits of poultry, eggs and poultry products.

OTHER RELEVANT REPORTS

MX9034: Mexico Bans Poultry Imports from Two Tennessee Counties.

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Mexico%20Bans%20Poultry%20Imports%20from%20Two%20Tennessee%20Counties%20_Mexico_Mexico_5-21-2009.pdf

MX9017: Livestock and products Semi Annual
http://www.fas.usda.gov/gainfiles/200904/146347694.pdf

MX9009: Mexico Announces Three States as Free of Classical Swine Fever
http://www.fas.usda.gov/gainfiles/200903/146337552.pdf

MX9007: Grain & Feed Annual
http://www.fas.usda.gov/gainfiles/200903/146327454.pdf

MX9004: Poultry and Products Semi Annual
http://www.fas.usda.gov/gainfiles/200903/146347597.pdf

MX8072: October Update on Grain & Feed
http://www.fas.usda.gov/gainfiles/200810/146306303.pdf

MX8057: Poultry and Products Annual Report
http://www.fas.usda.gov/gainfiles/200809/146295692.pdf

MX8052: Livestock and Products Annual
http://www.fas.usda.gov/gainfiles/200810/146296082.pdf

Production, Supply and Demand Data Statistics:

PS&D Poultry Meat, Broilers

PS&D Table									
Country:	**Mexico**								
Commodity:	**Poultry, Meat, Broiler**								
	USDA Official	**Old Post Data**	**New Post Estimate**	**USDA Official**	**Old Post Data**	**New Post Estimate**	**USDA Official**	**Old Post Data**	**New Post Estimate**
Market Year Begin	**01/2008**			**01/2009**			**01/2010**		
Inventory (Reference)	0	0	0	0	0	0			0
Slaughter (Reference)	0	0	0	0	0	0			0
Beginning Stocks	0	0	0	0	0	0			0
Production	2,804	2,804	2,853	2,795	2,795	2,810			2,880
Whole, Imports	0	0	10	0	0	11			11
Parts, Imports	447	438	424	470	460	475			484
Intra-EU Imports	0	0	0	0	0	0			0
Other Imports	0	0	0	0	0	0			0
Total Imports	447	438	434	470	460	486			495
Total Supply	3,251	3,242	3,287	3,265	3,255	3,296			3,375
Whole, Exports	0	0	0	0	0	0			0
Parts, Exports	11	14	4	13	15	5			8
Intra EU Exports	0	0	0	0	0	0			0
Other Exports	0	0	0	0	0	0			0
Total Exports	11	14	4	13	15	5			8
Human Consumption	3,240	3,228	3,283	3,252	3,240	3,291			3,367
Other Use, Losses	0	0	0	0	0	0			0
Total Dom. Consumption	3,240	3,228	3,283	3,252	3,240	3,291			3,367
Total Use	3,251	3,242	3,287	3,265	3,255	3,296			3,375
Ending Stocks	0	0	0	0	0	0			0

Total Distribution	3,251	3,242	3,287	3,265	3,255	3,296			3,375

PS&D Poultry Meat, Turkey

PS&D Table									
Country:	Mexico								
Commodity:	Turkey								
	USDA Official	Old Post Data	New Post Estimate	USDA Official	Old Post Data	New Post Estimate	USDA Official	Old Post Data	New Post Estimate
Market Year Begin	**01/2008**			**01/2009**			**01/2010**		
Inventory (Reference)	0	0	0	0		0			0
Slaughter (Reference)	0	0	0	0		0			0
Beginning Stocks	0	0	0	0		0			0
Production	15	15	15	16		15			15
Whole, Imports	0	0	0	0		0			0
Parts, Imports	207	207	204	211		205			206
Intra-EU Imports	0	0	0	0		0			0
Other Imports	0	0	0	0		0			0
Total Imports	207	207	204	211		205			206
Total Supply	222	222	219	227		220			221
Whole, Exports	4	0	0	4		0			0
Parts, Exports	0	0	0	0		0			0
Intra EU Exports	0	0	0	0		0			0
Other Exports	0	0	0	0		0			0
Total Exports	4	0	0	4		0			0
Human Consumption	218	222	219	223		220			221
Other Use, Losses	0	0		0		0			0
Total Dom. Consumption	218	222	219	223		220			221
Total Use	222	222	219	227		220			221
Ending Stocks	0	0	0	0		0			0
Total Distribution	222	222	219	227		220			221

Table 1. Mexico: Quantities of birds and stages of production for 2008

Table 1. Mexico: Quantities of birds and stages of production for 2008	
Type of Bird	**Heads**
Laying Hens in production*	131,065,007
Pullets in grow out	39,319,502
Light Breeding Hens in production	909,079
Light Breeding Hens in grow out	375,484
Heavy Breeder Hens in production	9,433,00
Heavy Breeder Hens in grow out	6,453,000
Heavy Progenitor Hens in production	200,739
Heavy Progenitor Hens in grow out	132,169
Broilers (Per cycle)	260,883,268
Turkeys (Per cycle)	935,869
Total Poultry Flock	**449,707,117**
* It is estimated that there are 34 millions of laying hens of 2nd cycle	

Table 2. Mexico: Comparison of Selected Poultry Product Imports (MT)

Table 2. Mexico: Comparison of Selected Poultry Product Imports (MT)				
H.S. Tariff Number	Description & Country of Origin	Jan-May 2008	Jan-May 2009	Comparison 2009/08 (%)

0105.11.01	Day old chicks, which do not need feeding during transport			
	U.S. & SUBTOTAL (Thousand head)	746	741	(0.67)
0105.11.02	Breeding stock, layer-type with selected breed certificate when imports are no more of 15,000 heads in each operation.			
	U.S. & SUBTOTAL (Thousand head)	399	392	(1.75)
0105.11.99	Other			
	U.S. & SUBTOTAL	22	0	
0105.19.99	Other (Chickens)			
	U.S. & SUBTOTAL (Thousand head)	415	1,815	337.74
0207.11.01	Other fresh or chilled whole poultry			
	U.S. & SUBTOTAL	5,155	5,744	11.42
0207.12.01	Other frozen whole poultry			
	U.S. & SUBTOTAL	1,862	2,800	50.37
0207.25.01	Whole frozen turkey			
	U.S.	691	552	(20.11)
	CHILE	48	21	(56.25)
	OTHER	0	0	
	SUBTOTAL	739	573	(22.46)
0207.33.01	Not cut in pieces, frozen			
	U.S. & SUBTOTAL	407	459	12.77
0207.26.01	Mechanically deboned turkey meat			
	U.S. & SUBTOTAL	6,977	2,613	(62.54)
0207.26.99	Fresh & chilled turkey parts			
	U.S. & SUBTOTAL	43,305	34,362	(20.65)
0207.13.01	Mechanically deboned chicken meat fresh or Chilled			
	U.S. & SUBTOTAL	58,889	66,795	13.42
0207.14.01	Mechanically deboned chicken meat frozen			
	U.S.	18,558	14,104	(24.00)
	CHILE	2,376	5,241	120.58
	SUBTOTAL	20,934	19,345	(7.59)
0207.13.99	Fresh & chilled chicken parts			
	U.S. & SUBTOTAL	5,690	4,318	(24.11)
0207.14.99	Frozen poultry parts			
	U.S.	5,675	5,920	4.31
	OTHER	6,119	4,063	(33.60)
	SUBTOTAL	11,794	9,983	
0207.13.03	Chicken Leg Quarter, Fresh/chilled			
	U.S.	22,395	39,766	77.56
	OTHER	0	0	
	SUBTOTAL	22,395	39,766	77.56
0207.14.04	Chicken Leg Quarter, Frozen			
	U.S.	41,894	41,731	(1.24)
	OTHER	733	715	(2.45)
	SUBTOTAL	42,627	42,446	(0.42)
0207.27.01	Mechanically deboned turkey meat, frozen			
	U.S.	3,835	1,602	58.22)
	OTHER	371	365	(1.61)
	SUBTOTAL	4,206	1,967	(53.23)
0207.27.99	Frozen turkey parts			
	U.S.	19,380	14,261	(26.41)

	OTHER	1,250	1,659	32.72
	SUBTOTAL	20,630	15,920	(22.83)
0207.36.99	Duck, geese or guineas cuts, frozen			
	U.S. & SUBTOTAL	50	28	(44.00)
0207.14.02 & 0207.36.01	Poultry livers			
	U.S. & SUBTOTAL	3	21	600
0407.00.01	Table eggs, fresh, including hatching eggs			
	U.S. & SUBTOTAL	80	474	492.50
1601.00.01	Sausages of broiler or turkey			
	U.S.	8,213	7,113	(13.39)
	OTHER	0	62	100
	SUBTOTAL	8,213	7,175	(12.63)
1602.31.01	Processed meat (Turkey)			
	U.S.	591	253	(57.19)
	OTHER	34	45	32.35
	SUBTOTAL	625	298	(52.32)
1602.32.01	Prepared or preserved chicken meat or offal			
	U.S.	5,583	4,817	(13.72)
	OTHER	343	416	21.28
	SUBTOTAL	5,926	5,233	(11.69)
1602.39.99	Other processed poultry meat			
	U.S.	8	5	(37.50)
	FRANCE	3	5	66.66
	OTHER	0	0	
	SUBTOTAL	11	10	(9.09)
0207.13.02	Chicken carcasses, fresh or chilled			
	U.S. & SUBTOTAL	5,419	6,951	28.27
0207.14.03	Chicken carcasses, frozen			
	U.S. & SUBTOTAL	58	0	
0207.26.02	Turkey carcasses, fresh or chilled			
	U.S. & SUBTOTAL	0	0	
0207.27.03	Turkey carcasses, frozen			
	U.S. & SUBTOTAL	0	0	

Source: Global Trade Information Services, Inc. “World Trade Atlas” Mexico Edition, May 2009.