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Poultry and Products

Annual

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Report Highlights:
After several years of increases, France's poultry production decreased in 1999 but will increase again in 2000, driven by larger turkey and duck production. Chicken production will continue to decrease in 2000, due to sluggish domestic demand and to increased competition abroad, pushing poultry prices down. France has a well-developed, export-oriented industry with very competitive prices on exports but BOURGOIN SA, a major French poultry company, went bankrupt 2000. French poultry exports to the EU are up. Exports to the Middle East region are down, due to the acute competition from Brazil.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

In 1999, about 2.23 million MT of poultry meat was produced in France. Both turkey (0.69 MMT) and chicken meat (1.12 MMT) production was down while production of other poultry meat (duck, guinea fowl and goose) was up. The trend is expected to continue in 2000 for chicken meat due to sluggish demand at home and abroad, while turkey meat production is likely to increase, fueled by a strong demand for value-added products as well as by EU export markets. A growing share of French poultry production is made up of expensive free-range birds under a program called Red Label.

French poultry companies, especially DOUX and LDC, are European leaders. DOUX exports mostly frozen broilers to the Middle East. The BOURGOIN company, which ranked second in the French poultry industry, went bankrupt in the first quarter of 2000 and most of its subsidiaries either closed down or were sold to competitors.

Although poultry prices for export are not officially published, they were estimated in 1999 at 0.45 USD/lb for frozen broilers, down from CY 1998. French poultry consumption was 22.7 kg per person in 1999 and is

expected to decrease slightly in 1999 but to either remain stable or grow slightly in CY 2000. Poultry parts and value-added products are taking a growing share of total poultry meat consumption at the expense of whole birds.

More than 40 percent of French poultry production was exported in 1999. EU countries, especially Germany and UK, and, although declining, Middle East countries and Russia, are the main export markets for France. Despite stiffer competition in its traditional market in the Middle East, declining exports to Russia, and because exports to other EU countries are on the increase, French poultry exports are expected to grow slightly in 2000.

Sources

Data and other information in this report are gathered from both governmental and industry sources. Governmental sources include the Ministry of Agriculture, Fisheries and Food (MinAg) and the French Meat and Poultry Board (OFIVAL).

Industry sources include: the French Technical Institute for Poultry (ITAVI) and various poultry companies.

Production

General

French poultry meat production exceeded 2.2 million MT in CY 1999, maintaining France's position as the largest poultry producer in the European Union (EU) and the fourth largest in the world, after the United States, China and Brazil. French poultry meat production has doubled in the last twenty years.

French poultry production (in CY 1998 and 1999) (thousand MT)

	1998	1999
Chicken	1190	1120
Turkey	725	690
Duck	224	230
Guinea fowl	57	56
Others (hen, goose, quail, pigeon, ...)	124	132
Total	**2320**	**2228**

(Source OFIVAL, Ministry of Agriculture and Fisheries)

The chicken production figure in the PS&D does not include production of live birds for export (about 50,000 MT). It includes only chicken produced for slaughtering in France.

Early data for CY 2000 show that chicken slaughter in France declined by 6 percent in the January to May period compared to the same period of CY 1999. This decrease is due to the closing of many chicken farms in Brittany. Farmers who stop producing chicken receive a subsidy of FF 150 (EURO 22.86) per square meter of production facility, given by the State and by the regional council of Brittany. This plan has been rather successful, with hundreds of farmers quitting chicken production.

On the other hand, turkey slaughtering increased significantly in the January to May period, driven by a strong demand on domestic market for value added products and on export market, especially Italy. To prevent another over-production, the French Turkey Association (CIDEF) has asked turkey producers to lower their flock density.

Free range and Red Label poultry production
Beginning in the early 1970's, France developed free-range poultry production under the Red Label program.

This program set a wide range of production criteria such as genetics (or breed), feed, and duration of grow out. The French Ministry of Agriculture grants the Red Label to farmers' groups or cooperatives whose production matches the program's standards. Red Label poultry production is subject to thorough controls at each stage of the process to ensure quality. In the aftermath of the "mad cow" crisis that made consumers wary of industrially-produced meat, Red Label poultry consumption has increased sharply despite its higher price. In 1999, more than 15 percent of French chicken meat production was Red Label. Red Label poultry was also less affected by the drop in demand for poultry meat in the aftermath of the dioxin scandal in Belgium in May 1999. Preliminary data show that Red Label poultry is on the increase in the first months of 2000.

For more detailed information about the Red Label program, contact:
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Overview of the French poultry industry

General

The rapid development of the French poultry sector is linked to increased regional specialization. Close to 80 percent of French poultry meat is produced in the western quarter of the country, Brittany alone accounting for 47 percent of total French production. However, increased environmental constraints are likely to limit further production increases in these regions, to the benefit of other parts of France. Such constraints may eventually hamper French poultry's competitiveness by raising prices.

Close to 95 percent of poultry farmers have contracts with poultry companies. The company provides chicks and feed and sometimes the building; it pays the farmer according to weight and quality of the birds.

Poultry Companies

In France, seven poultry companies have sales in excess of 1 billion FF (USD 170 million). Of those, 3 major groups, DOUX, LDC and BSA-BOURGOIN account for more than 67 percent of total French poultry sales. DOUX S.A. is the largest EU poultry producer. The company employs 8,000 workers in France and has facilities in Germany, Spain, Portugal, the United States and Switzerland. DOUX is a highly integrated poultry company, owning its breeding facilities, feed compounder, slaughterhouses and shipping company, specializing in chicken meat (70 percent of its sales) and turkey meat (25 percent). DOUX is the leading French exporter of frozen whole chicken to the Middle East region. However, the decrease in EU export subsidies mandated by the Marrakesh agreement, as well as increased Brazilian competition led DOUX to focus more on the domestic market for fresh value-added poultry products. In 1998, DOUX purchased the Brazilian poultry company FRANGOSUL S.A. AGRO AVICOLA INDUSTRIAL, the fourth largest Brazilian poultry company with USD 300 million sales, of which USD 123 million in exports. Most poultry analysts forecast that DOUX will be producing more and more export poultry in low cost countries such as Brazil to keep its competitiveness.

LDC Group is the second French poultry company. Not as integrated as DOUX, LDC has a very strong position on the domestic market, with a specialization in Red Label poultry. LDC has also subsidiaries in Spain, Poland and China.

BSA-BOURGOIN Group used to be the second largest EU poultry group, employing as many as 6,500 workers in 40 industrial plants and is highly integrated. It was a large turkey meat exporter, especially for mechanically deboned turkey meat exports to Russia. However, In March 2000, its main subsidiary, BSAD filed for bankruptcy. Its jointly owned chicken export subsidiary, TILLY SABCO, was sold to its other owner, UNICOPA, and one of its two slaughterhouses was closed. UNICOPA plans to withdrew from the frozen chicken export market and focus on fresh and value added poultry products. Other feed, slaughter and transportation subsidiaries were closed down. DUC, the main domestic quality poultry brand was sold to investors.

A list and more information on French poultry companies can also be found on this website: http://www.mhr-viandes.com/en/mainbody.htm

Production costs and prices

General

Due to the contractual relationships between farmers and poultry companies, assessment of production costs is difficult. However, some studies help to estimate the price competitiveness of French poultry.

Export Prices

The average wholesale price, as published by the French Ministry of Agriculture, does not represent export prices. It shows prices for broilers for domestic consumption. Birds for domestic production are heavier, take longer to grow and the farmer usually produces 5.9 flocks per year (versus the 6.7 to 7.2 flocks/year for export chickens). The wholesale price is therefore 2 to 4 FF per kilo (USD 0.15 to 0.30/lb), live weight, higher than export birds.

Moreover, export companies such as DOUX have built facilities specifically targeted for the export market, from production to slaughtering and packaging, hence reducing their costs. DOUX, which accounts for 70 to 80 percent of French frozen poultry exports to the Middle East, uses 4 chartered ships built specifically for shipping frozen poultry. Each ship carries 5,000 MT of frozen chicken in the hull and 1,200 MT in 52 containers on the deck. Each journey to Jeddah takes 15-20 days. Southern Hemisphere fruits, such as apples, kiwis, pineapples, avocados and oranges, are back loaded from South Africa.

1998 Cost estimates for frozen whole broilers (70 percent with offal) exported to the Middle East

	FF per Kg	USD per pound (1 USD = 5.90 FF)
Chick costs (1.40 FF per chick)	0.75	0.058
Feed cost	+2.15	+0.166
Farmer’s revenue	+1.25	+0.097
Total: Price of Live Chicken	**4.15**	**0.320**
Price after slaughtering (78 percent slaughtering yield) and losses (2 percent)	5.40	0.416

Industrial costs (trucking, slaughtering, freezing, etc...)	+2.10	+0.162
Price before shipping	**7.30**	**0.563**
Shipping costs (Brest to Jeddah)	+1.20	+0.093
Price Chicken CIF Jeddah	**8.50**	**0.655**

(*Sources: Ministry of Agriculture, ITAVI*)

Shipping costs: Frozen poultry from Brest (France) to Jeddah (data from 1996 - no more recent data available)

Total:	**180 USD** per metric ton
inc. loading of the ship:	35 USD per metric ton
inc. freight and insurance:	15 USD per metric ton
Supplement for loading at Dammam (Eastern coast of Saudi Arabia)	50 USD per metric ton

(Sources: Centre d'Economie Rurale du Finistère, ITAVI)

According to several poultry specialists, several factors could increase French poultry production costs in forthcoming years:
- **Animal Welfare**: a mandatory decrease in production density (number of birds per square meter) could increase costs by 0.1 to 0.3 FF per KG of live bird (0.8 to 2.4 cents/lb)
- **Environmental constraints**: disposal of manure and other wastes could increase production costs by as much as 0.28 FF/KG of live bird (2.2 cents/lb)
- **Prohibition on additives, including antibiotics, in feed** would increase mortality and feed consumption. This extra cost could be charged to the farmer's income, but it is very likely that he would ask the poultry company to bear part of the burden.
- **Feed cost**: grain prices are expected to decrease by as much as 15 percent, due to the new EU farm policy, reducing production costs by 0.1 to 0.2 FF per KG live weight (0.8 to 1.6 cents/lb). On the other hand, the ban on animal meals in feed proposed by several EU countries could increase production cost by 0.1 to 0.15 FF per KG of live bird (0.8 to 1.2 cents/lb).

Although these constraints are not implemented yet, discussions of their imposition have started at the EU level. One can expect poultry companies and some EU member states, possibly including France, to oppose those proposals.

The table below shows export prices calculated by dividing the export value by the export volume. It gives an idea of the FOB price and does include restitutions. The difference between the EU-15 price and the third country price is also explained by different classes of products. Frozen whole chickens exported from France to the EU-15 are generally Class A broilers (minimum 41 days before slaughtering, average live weight 1.89 kilo) versus a standard export chicken (usually 35 to 38 days before slaughtering, average live weight 1.40 to 1.43 kilo).

Whole frozen chicken export prices for selected destinations, calculated with customs data

USD/lb	Frozen whole chicken		
	1997	1998	1999

Angola	0.572	0.439	0.266
Iran	0.505	0.472	0.427
Saudi Arabia	0.545	0.49	0.466
Kuwait	0.553	0.481	0.452
Bahrein	0.568	0.484	0.438
Qatar	0.573	0.489	0.448
U.A.E.	0.553	0.478	0.427
Oman	0.549	0.474	0.426
Yemen	0.554	0.477	0.433
Avg. Middle East	**0.55**	**0.483**	**0.451**
Russia	0.608	0.602	0.285
EU-15	0.692	0.652	0.589
Third Countries	0.559	0.496	0.433
World	**0.578**	**0.511**	**0.445**

(Source OFIVAL, French customs)

French export prices have been steadily declining over the past three years. Recent data showed that the trend strengthened in the first half of 2000, fueled by an acute competition with Brazil. To compete more effectively, French poultry exporters have even asked for a special restitution scheme for exports to Yemen. However, the EU commission has not yet responded to their demand.

Consumption

General

French poultry meat production was 22.7 kg per person in 1999, down from 1998. In the last 25 years, poultry meat consumption has almost doubled. However, poultry meat still ranks third, after pork (35.2 kg/person/year) and beef (26.7 kg/person/year). The consumption drop in 1999 is mainly due to the dioxin crisis in Belgium which was heavily mediatized in France and a competition from other meats whose prices became more attractive to consumers. Between May and August 99, consumption dropped by 10 percent, but partially recovered at the end of the year. The drop in consumption was higher for standard broiler while Red Label chicken and turkey were less affected.

Poultry meat consumption in France (kg/person/year)

	1990	1995	1996	1997	1998	1999
Total Poultry	**21.3**	**22.9**	**23.7**	**23.4**	**23.7**	**22.7**
Chicken	11.3	11.2	12.3	12.1	12.2	11.7
Turkey	5.5	6.4	6.1	5.8	5.8	5.4

Duck	1.8	2.6	2.6	2.8	2.8	2.8
Guinea Fowl	0.9	0.9	0.9	0.9	0.9	0.9

(Source OFIVAL, Ministry of Agriculture)

On average, it is estimated that every year, each French person eats 9 chickens (including 1.5 free range Red Label), 1 turkey, 1 duck, 1 guinea fowl and 2 kg of other poultry such as hen, goose, quail and pigeon. An increasing part of poultry meat is consumed either as parts or as value-added products.

About 55 percent of poultry meat is sold in super- or hypermarkets. Traditional butchers account for 23 percent and catering and restaurants for 22 percent. Catering purchases of poultry meat grew by 5 percent in 1998.

Note that consumption figures in the PS&Ds include stock variations, which are not known precisely.

Consumption trends

According to various research institutes, poultry meat consumption in France is likely to remain stable or to increase slightly in 2000, with larger sales of poultry parts and value added products, but lower sales of whole birds. Although the proposed CAP reform should lower beef prices, the high rate of unemployment and stagnant incomes in France are likely to sustain cheap poultry meat consumption. On the other hand, consumers will also be looking for luxury poultry products (such as capon, free range whole turkey and goose) for the holiday seasons. Finally, analysts expect consumers to pay more attention to environmental and ethical criteria such as animal welfare. Growing sales of Red Label products reflect such concerns.

Trade

General

More than 40 percent of French poultry production was exported in 1999 (2 birds out of 5). Net exports reached FF 8.79 billion (USD 1.43 billion). The EU remained the largest customer for French poultry. More than half of French exports (of which 60 percent were parts) to UK and Germany, the second and third French export markets, were fresh or chilled, while almost all exports to Saudi Arabia, the leading French export market, were frozen.

French poultry exports in CY 2000 are expected to increase despite strong competition in both third-country and EU markets. Chicken exports are expected to decrease, especially exports of frozen whole chicken to the Middle East region, due to the competition with Brazilian poultry meat and the reduction in the total volume authorized by the WTO agreement to be exported with subsidies. On the other hand, exports of turkey meat are expected to grow significantly, especially to Italy, where the demand has been higher due to avian influenza. French poultry exporters are likely to face a difficult situation in Britain and Germany, as retailers are favoring domestic producers with labels such as "buy British". Note that poultry total, chicken and turkey meat export data in the PS&D have been revised from previous reports. Because of inconstitent conversion rates between product weight basis and RTC, discrepancies were large between sources. Post has chosen the most reliable source (OFIVAL) to revise data.

The Russian market is expected to remain difficult for French poultry exports. For the first 4 months of CY

2000, exports dropped by 20 percent, compared with the same period of CY 1999. Exports of frozen whole chicken fell by 15 percent, as well as exports of mechanically deboned turkey meat (minus 21 percent), which had increased in CY 1999. Its price remained very low (FF 2.44/KG or USD 0.18/lb).

France imports mostly deboned meat (chicken and duck) from EU countries, Hungary, Thailand, Israel and several others Eastern European countries.

Note that export matrices for "poultry meat, total" "chicken meat" and "turkey meat" are on MT, RTC basis.

Export strategy

France has a very competitive and export-oriented poultry industry and has built strong commercial ties with buyers in the Middle East region. For example, DOUX employs Arabic staff, both in France and in the region. Such commercial ties can offset higher prices, as DOUX is often considered a trusted partner. French products meet the market`s demand for a small chicken (less than 1 kilo per bird); in fact, even if the price per kilo of French poultry is higher than Brazil’s, the price per chicken is lower.

French exporters also choose to diversify their product lines: instead of focusing solely on frozen whole broilers, they now export more and more MDM as well as processed products such as poultry sausages or offal. In fact, French poultry companies are now imitating the U.S. trend toward selling value-added products at a premium price in the home market while discounting legs, wings and offal destined for export markets. Such a policy reduces the need for export restitutions.

Marketing

Non-Tariff Barriers

Following a decree of 1961, France currently prohibits imports of U.S. poultry for human consumption due to veterinary regulations banning imports from countries that include arsenic in poultry feed.

Eggs

Production

France is the largest EU egg producer, with close to 19 percent of total EU egg production. French egg production is expected to decrease slightly in CY 2000 after reaching a peak in CY 1999. Such a decrease, which happened later than in other egg-producing EU countries, have already impacted positively on egg prices (+15 to 20 percent) in the first half of CY 2000.

Consumption

It is difficult to assess precisely French egg consumption. Using the PS&Ds, egg consumption is expected to grow by 0.5 percent in CY 2000. However, consumer panel studies show a 2 percent decrease for the first half of CY 2000. Average French egg consumption is still about 250 eggs per person per year, putting France first in egg consumption in the EU.

The production of egg products uses about 3,100 million shell eggs (20 percent of total domestic egg consumption). This figure has doubled in the last 10 years. About 70 to 75 percent of egg products are sold to the catering sector and 25 percent to the food industry. Only a negligible share of egg products are sold to households.

Household shell egg consumption is estimated at 7,500 million eggs annually, 70 percent through supermarkets sales. The food industry accounts for approximately 1,000 million shell eggs yearly.

Free range and organic eggs account for 6 to 7 percent of total household purchases of shell eggs. Sales of organic and free range eggs have increased significantly in CY 1999, following the dioxin scandal.

(Note: The difference between this figure and the above PS&D domestic consumption figures is due to losses, unaccounted uses and unavailable stock estimates. Also note that new data for losses and non-food uses have allowed Post to update "Shell Eggs, OT Use, Loss" and "Other Dom. Consumption" in the PS&Ds)

Egg producing companies

In 1999, three large companies produced and sold eggs on the domestic market: MATINES SA, GIE APPRO LUSTUCRU and L'OEUF DE NOS VILLAGES. Each of these companies had 3 to 5 million laying hens in production facilities nationwide.

There are three main French companies that specialize in egg products: GLON SA, EPI BRETAGNE and IGRECA. These companies have subsidiaries in other EU countries.

Egg Trade

Exports and imports represent only a minor part of total French egg production and distribution.

As in the previous year, the largest share of the trade is within the EU. Germany is the primary customer for French shell eggs, while the Netherlands and Belgium are France’s primary shell egg suppliers. France imports mostly small-size eggs for breaking.

French egg products trade was in net surplus in 1999. France purchases low cost products, such as liquid or frozen eggs, and exports high value products, such as dried yolk and albumin to EU countries as well as to other industrialized countries, such as Japan.

Despite WTO import quotas, France does not import from the U.S., due to high prices for U.S. eggs. There have been rumors of imports of U.S. eggs for breaking and processing through the inward processing and re-export regime. However, the existence of this has not been confirmed.

Tables

Poultry meat, total

PSD Table						
Country	France					

Commodity	Poultry, Meat, Total				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
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	2245	2228	2240	2250	0	2321
Whole, Imports	29	14	31	17	0	17
Parts, Imports	142	146	156	154	0	161
Intra EC Imports	141	141	157	149	0	155
Other Imports	0	0	0	0	0	0
TOTAL Imports	171	160	187	171	0	178
TOTAL SUPPLY	2416	2388	2427	2421	0	2499
Whole, Exports	413	420	405	406	0	379
Parts, Exports	580	437	586	468	0	499
Intra EC Exports	490	403	491	439	0	470
Other Exports	0	0	0	0	0	0
TOTAL Exports	993	857	991	874	0	878
Human Consumption	1423	1531	1436	1547	0	1621
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	1423	1531	1436	1547	0	1621
TOTAL Use	2416	2388	2427	2421	0	2499
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	2416	2388	2427	2421	0	2499
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	France		
Commodity	Poultry, Meat, Total		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	154	U.S.	
Others		Others	
Belgium/Lux	49446	Belgium	42275
Spain	20289	Netherlands	36462
Netherlands	20281	United Kingdom	21637

United Kingdom	17479	Spain	16551
Hungary	8713	Germany	14018
Germany	6910	Italy	4438
Italy	3528	Denmark	3623
Ireland	3069	Portugal	2595
Denmark	2036		
Sweden	2031		
Total for Others	133782		141599
Others not Listed	10491		31240
Grand Total	144427		172839

Export Trade Matrix			
Country	France		
Commodity	Poultry, Meat, Total		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	25	U.S.	
Others		Others	
Saudi Arabia	105983	Saudi Arabia	135962
United Kingdom	104986	Germany	123989
Germany	98774	United Kingdom	121859
Russia	73203	Belgium	92654
Belgium/Lux	58697	Russia	84638
Spain	57336	Spain	60473
Iran	43130	Yemen	38178
Yemen	38248	Netherlands	36168
United Arab Emirates	32511	United Arab Emirates	33099
Netherlands	29172	Oman	21697
Total for Others	642040		748717
Others not Listed	207206		216042
Grand Total	849271		964759

Chicken Meat,

PSD Table						
Country	France					
Commodity	Plty, Meat, Chicken -16 wks				(1000 MT)(MIL HEAD)	

	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
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	1160	1120	1120	1085	0	1100
Whole, Imports	23	12	25	15	0	15
Parts, Imports	122	129	135	135	0	140
Intra EC Imports	130	128	145	134	0	140
Other Imports	0	0	0	0	0	0
TOTAL Imports	145	141	160	150	0	155
TOTAL SUPPLY	1305	1261	1280	1235	0	1255
Whole, Exports	360	352	350	330	0	300
Parts, Exports	180	162	175	165	0	180
Intra EC Exports	180	177	175	180	0	190
Other Exports	0	0	0	0	0	0
TOTAL Exports	540	514	525	495	0	480
Human Consumption	765	747	755	740	0	775
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	765	747	755	740	0	775
TOTAL Use	1305	1261	1280	1235	0	1255
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1305	1261	1280	1235	0	1255
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	France		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	166	U.S.	
Others		Others	
Belgium/Lux	46428	Belgium	39641
Netherlands	19604	Netherlands	35342
Spain	14678	United Kingdom	20067

United Kingdom	17439	Spain	15262
Germany	7614	Germany	12520
Hungary	5676	Ireland	5227
Thailand	2844	Denmark	3466
Italy	2369	Italy	2222
Ireland	2342		
Denmark	2083		
Total for Others	121077		133747
Others not Listed	4717		18335
Grand Total	125960		152082

Export Trade Matrix			
Country	France		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	20	U.S.	
Others		Others	
Saudi Arabia	113659	Saudi Arabia	135842
United Kingdom	87287	United Kingdom	92841
Iran	46445	Belgium	51183
Yemen	41069	Germany	42460
United Arab Emirates	34393	Yemen	38178
Germany	32345	United Arab Emirates	32960
Russia	28199	Oman	21697
Spain	23274	Spain	21305
Belgium/Lux	21566	Netherlands	16640
Oman	20995	Kuwait	9498
Total for Others	449232		462604
Others not Listed	119381		125098
Grand Total	568633		587702

Turkey Meat

PSD Table						
Country	France					
Commodity	Poultry, Meat, Turkey				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
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	691	688	715	705	0	715
Whole, Imports	1	1	1	1	0	1
Parts, Imports	10	6	10	7	0	8
Intra EC Imports	10	7	10	8	0	8
Other Imports	0	0	0	0	0	0
TOTAL Imports	11	7	11	8	0	9
TOTAL SUPPLY	702	695	726	713	0	724
Whole, Exports	34	32	35	38	0	40
Parts, Exports	364	271	375	295	0	310
Intra EC Exports	255	189	260	220	0	240
Other Exports	0	0	0	0	0	0
TOTAL Exports	398	303	410	333	0	350
Human Consumption	304	392	316	380	0	374
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	304	392	316	380	0	374
TOTAL Use	702	695	726	713	0	724
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	702	695	726	713	0	724
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Export Trade Matrix			
Country	France		
Commodity	Poultry, Meat, Turkey		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	70938	Russia	66438

Russia	63279	Germany	61965
Belgium/Lux	46305	Belgium	36868
Spain	43471	Spain	36503
United Kingdom	31227	United Kingdom	22196
Netherlands	21309	Netherlands	16456
Cuba	13576	Austria	10739
Austria	13417		
Benin	11833		
Denmark	9731		
Total for Others	325086		251165
Others not Listed	48713		72491
Grand Total	373799		323656

Import Trade Matrix			
Country	France		
Commodity	Poultry, Meat, Turkey		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Belgium/Lux	2133	Italy	2122
Spain	1607	Belgium	1422
United Kingdom	1094	United Kingdom	1330
Italy	994	Spain	1171
Israel	717	Germany	1063
Total for Others	6545		7108
Others not Listed	2575		2782
Grand Total	9120		9890

Eggs

PSD Table						
Country	France					
Commodity	Poultry, Eggs				(MIL HEAD)	(MIL PCS)
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Layers	50	50	50	50	0	0
Beginning Stocks	0	0	0	0	0	0
Production	17400	17550	17200	17500	0	17450
Hatch Eggs, Imports	20	22	20	20	0	20
Shell Eggs, Imports	720	861	650	880	0	900
Other Imports	930	768	880	800	0	820
Intra EC Imports	1580	1650	1460	1680	0	1720
TOTAL Imports	1670	1651	1550	1700	0	1740
TOTAL SUPPLY	19070	19201	18750	19200	0	19190
Hatch Eggs, Exports	120	85	110	90	0	90
Shell Eggs, Exports	490	675	480	680	0	700
Other Exports	1260	1230	1230	1250	0	1270
Intra EC Exports	1540	1622	1480	1640	0	1670
TOTAL Exports	1870	1990	1820	2020	0	2060
Hatch Eggs,Consumption	1500	1450	1410	1420	0	1420
Shell Eggs, Human	14220	14220	14040	14280	0	14230
Shell Eggs,OT.Use/Loss	130	130	130	130	0	130
Other Dom. Consumption	1350	1411	1350	1350	0	1350
Total Dom. Consumption	17200	17211	16930	17180	0	17130
TOTAL Use	19070	19201	18750	19200	0	19190
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	19070	19201	18750	19200	0	19190
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	France		
Commodity	Poultry, Eggs		
Time period	Jan-Dec	Units:	MT, shell eggs equivalent
Imports for:	1998		1999
U.S.	63	U.S.	

Others		Others	
Belgium/Lux	32227	Spain	21148
Germany	19656	Netherlands	21074
Netherlands	12801	Germany	18767
Spain	11943	Spain	16007
Italy	7367	United Kingdom	4463
United Kingdom	4677	Italy	3966
Portugal	1845		
Total for Others	90516		85425
Others not Listed	431		4191
Grand Total	91010		89616

Export Trade Matrix			
Country	France		
Commodity	Poultry, Eggs		
Time period	Jan-Dec	Units:	MT, Eggs equivalent
Exports for:	1998		1999
U.S.	8	U.S.	
Others		Others	
Germany	24640	Germany	29351
Belgium/Lux	15918	Belgium	18354
Italy	15053	Italy	16248
Netherlands	10143	Netherlands	15215
United Kingdom	9873	United Kingdom	11907
Spain	6706	Spain	3347
Switzerland	6452		
Japan	1300		
Austria	1250		
Denmark	1038		
Total for Others	92373		94422
Others not Listed	6822		20884
Grand Total	99203		115306

Feed demand, strategic indicator tables for France

FEED DEMAND						
STRATEGIC INDICATOR TABLES FOR FRANCE						
MEAT PRODUCTION						
		Last Year	Current Year	Out Year Forecast		
Calendar Year:	1998	1999	2000	2001		
Poultry						
Poultry Meat (1,000 MT, CWE):	2,324	2,228	2,250	2321		
Eggs (1,000 MT, shell eggs equivalent):	1,023	1,053	1,050	1047		
Pork (1,000 MT, CWE):	2,328	2,378	2,315	2270		
Beef and Veal (1,000 MT, CWE)	1,593	1,568	1,600	1600		
COMPOUND FEED SECTOR						
		Last Year	Current Year	Out Year Forecast		
Calendar Year:	1998	1999	2000	2001		
Compound Feed Capacity						
Total Compound Feed Produced (1,000 MT)	23,600	23,445				
------ by integrated producers (cooperatives)	50 percent	55 percent	N/A	N/A		
------ by commercial producers (private companies)	50 percent	45 percent	N/A	N/A		
FEED GRAIN USE						
		Last Year	Current Year	Out Year Forecast		
Marketing Year:	1998	1999	2000	2001		

Corn (Domestic consumption: feed)	5,086	4,626	5,353	5000		
Other (specify) (1,000 MT)						
soft 'wheat (1,000 MT)	10,434	10,407	10,659	10800		
PROTEIN - ENERGY USAGE						
		Last Year	Current Year	Out Year Forecast		
Marketing Year (1,000 MT):	1998	1999	2000	2001		
Total Protein Meal (feed waste domestic consumption) (including rape meal, sunflower meal, soybean meal, fish meal and peanut meal)	6,404	6,416	6,416	N/A		
Soy Bean Meal (feed waste domestic consumption) (MY October/September)	4,305	4,280	4,280	N/A		
Other Protein Meal: Rape Meal (feed waste domestic consumption) (MY July/June)	930	980	980	N/A		
Other Protein Meal: Sun Meal (feed waste domestic consumption) (MY July/June)	941	930	940	N/A		
Fish Meal (MY October/September)	96	95	95	N/A		
Palm Crude Oil (feed waste domestic consumption)	0	0	0	N/A		
TRADE (1,000 Metric Tonnes)						
		Last Year	Current Year	Out Year Forecast		
Calendar Year:	1998	1999	2000	2001		
Corn				N/A		
Imports:	228	235	229	N/A		
Exports:	7,694	8,359	8,080	N/A		
Soy Beans				N/A		
Imports:	603	550	550	N/A		
Exports:	18	20	20	N/A		
Soy Bean Meal				N/A		

Imports:	3,939	3,950	3,950	N/A		
Exports:	39	30	30	N/A		
Fish Meal				N/A		
Imports:	91	90	90	N/A		
Exports:	17	15	15	N/A		
Palm Crude Oil				N/A		
Imports:	112	110	110	N/A		
Exports:	2	2	2	N/A		
PROTEIN PRODUCTS TARIFFS AND TAXES		Bound Rate	Applied Rate	Other		
	Product	(%)	(%)	Import		
Report Year (from July 1, 2000 to June 30, 2001):	Description 1/			Taxes/Fees		
0505.90	FEATHER MEAL	exemption	exemption			
1501.00.00.60 including:	YELLOW GREASE					
1501 00 11: swine grease for industrial use other than food processing		exemption	exemption			
1501 00 19: other swine grease		17.2 Euros/100 kg	17.2 Euros/100 kg			
1501 00 90: poultry grease		11.5 percent	11.5 percent			
1502.00.00.40 including:	INEDIBLE TALLOW					
1502 00 10: animal fat for industrial use other than food processing		exemption	exemption			
1502 00 90: other		3.2 percent	3.2 percent			
1511 including:	PALM OIL					
1511 10 10: raw palm oil for technical or industrial use other than food processing		0.7 percent	0.7 percent			
1511 10 90: other raw palm oil		4.2 percent	4.2 percent			
1511 90 11: solid fractions of palm oil packed in 1 kg package maximum		14 percent	14 percent			

1511 90 19: solid fractions of palm oil packed differently		11.9 percent	11.9 percent			
1511 90 91: palm oil (other than raw or solid fractions) for technical/ industrial use		5.6 percent	5.6 percent			
1511 90 99: palm oil (other than raw or solid fractions) for other use		9.8 percent	9.8 percent			
1518 including:	ANML/VG FTS &OILS					
1518 00 10: linoxyne		7.7 percent	7.7 percent			
1518 00 31: raw animal and vegetable fats and oils fixed, fluid, simply mixed for technical/industrial use other than food processing		3.5 percent	3.5 percent			
1518 00 39: other than raw fats and oils as above		5.6 percent	5.6 percent			
1518 00 91: animal and vegetable fats and oils and their fractions, simply mixed, cooked, oxidated, dehydrated, sulfured or chemically modified in a different way, other than those of 1516		8.4 percent	8.4 percent			
1518 00 95: Non food mixtures or preparations of animal and vegetable fats and oils		2 percent	2 percent			
1518 00 99: other animal and vegetable fats and oils		8.4 percent	8.4 percent			
2301.10	MEAT AND BONE MEAL	exemption	exemption			
2301.20	FISH MEAL	exemption	exemption			