



USDA BROILER MARKET NEWS REPORT

MONDAY,
JUNE 23, 2003
VOL. 50 NO. 74

ISSN 1522-0567

U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL BROILER MARKET AT-A-GLANCE



Majority prices were mixed, but mostly unchanged when compared to prior week's values. Trade sentiment was generally steady. Retail demand was seasonally light to moderate, best for ads. Food service was moderate to good, best for catering and fast food promotions. Supplies were overall in good balance for trade needs. In the parts structure, trading was light and selective to fair. Dark meat was in the strongest position and continued to clear well. Breast items were in better balance, but still sufficient for needs, and wings were adequate to fully adequate. In production areas, live supplies were moderate. Weights were light to heavy, but mostly desirable.

Final report of prices negotiated for trucklot sales of ready-to-cook broiler/fryers delivered to first receivers at major market areas week of 06/23/03-06/27/03 (cents per lb)

| AREAS | US GRADE A (Includes branded product) | | COMPOSITE | | |
|---------------|--|----------------|-----------|------------|-------|
| | MAJORITY | WTD AVG | LOADS | WTD AVG | LOADS |
| | Delivered to First Receivers | | | | |
| Bos/New Eng | 60.00-65.00 | 61.88 | 16 | 62.70 | 29 |
| Chicago | 52.00-55.00 | 55.38 | 42 | 57.31 | 82 |
| Ohio Cities | TFEWR | — | — | 59.11 | 25 |
| Denver | 70.50 | 70.50 | 16 | 69.83 | 18 |
| Detroit | 54.00 | 56.44 | 9 | 59.22 | 46 |
| Los Angeles | 71.00 | 69.06 | 68 | 66.78 | 146 |
| New York | 58.00-61.00 | 59.14 | 22 | 58.88 | 46 |
| Philadelphia | 57.50-60.00 | 58.36 | 11 | 58.46 | 23 |
| Pittsburgh | 58.00-61.00 | 58.91 | 11 | 60.71 | 50 |
| St. Louis | 54.75-55.00 | 54.47 | 25 | 55.64 | 44 |
| San Francisco | 71.50 | 70.32 | 30 | 71.75 | 57 |
| | Composite Weighted Average | | | | |
| Loads | 06/23/03 | Change/Last Wk | 06/16/03 | 06/24/02 | |
| 566 | 61.96 | 0.58 | 61.38 | 58.37 | |

WOG BROILERS (without giblets) - prices paid per lb delv'd to first receivers in trucklot and less than trucklot quantities.

| REGIONS | MAJORITY | WTD AVG | LOADS |
|-------------|---|---------|-------|
| East | 59.00-61.00 | 60.69 | 28 |
| Central | 55.00-63.25 | 60.17 | 63 |
| West | 57.00-62.00 | 60.003 | 43 |
| | Southeast Area FOB Dock Equivalent | | |
| Mississippi | 65.00-66.50 | 65.53 | 82 |

GEORGIA F.O.B. DOCK PRICES Georgia f.o.b. dock quoted price on broilers/fryers for this week's trading is 66.00 cents based on ice-packed USDA grade "A" sized 2 1/2 to 3 pound birds.

| LOADS | RANGE | MONDAY FINAL WTD AVG FOB DOCK OR EQUIVALENT |
|-------|-------------|--|
| 1,144 | 55.00-68.00 | 64.04 |

The Georgia f.o.b. dock confirmed final weighted average prices on ice packed parts:

| ITEM | WTD AVG (CENTS PER POUND) | VOLUME (000 POUNDS) |
|------------------|------------------------------|------------------------|
| LINE RUN TENDERS | 198.00 | 1,474 |
| BREASTS - B/S | 181.50 | 5,450 |
| BREASTS - WHOLE | 99.50 | 1,953 |
| THIGH MEAT - B/S | 70.50 | 1,013 |
| LEG QUARTERS | 26.00 | 9,347 |
| WINGS | 73.50 | 3,125 |

THIS INFORMATION IS SUPPLIED BY THE GEORGIA DEPARTMENT OF AGRICULTURE'S POULTRY MARKET NEWS SERVICE.

NORTHEAST REGION BROILER/FRYER Trucklot buying activity on ready-to-cook whole/fryers was generally fair entering the week. Offerings of all sizes were sufficient for current needs. Retail and distributive movement was about fair. The market tone was steady. In the parts complex, breast items were balanced to adequate. Wings were adequate to available. The balance of cuts were manageable.

SOUTHERN REGION BROILER/FRYERS Trade sentiment was generally steady. Demand was light to moderate, best for features and ads, with limited trading and markets monitored; however, interest is expected to increase due to first of the month and upcoming July 4 holiday needs. Supplies were better balanced, but sufficient to handle trade needs. In the parts structure, movement was fair, but improvements and optimism were reported. Dark meat was in good balance and moving, breast items and wings were in better shape, but available. In production areas, live supplies were moderate at mostly desirable weights.

WESTERN REGION BROILER/FRYERS The final majority prices were unchanged from last week. Trade sentiment was about steady with new negotiations reported trading at mixed levels and regular commitments at unchanged prices. Offerings were in fairly good to close balance on WOGs less than 3.5 pounds and heavier weights fully adequate to cover immediate needs. Buying activity was fair with most buyers' evaluating needs for the approaching 4th of July holiday. Retailer demand was moderate overall best for parts. Dealers reported satisfactory weekend clearances. Trading reported on parts: drumstick low 30s, boneless leg meat high 60s, wings mid 70s, leg quarters bulk 25-27.5 and 4/10 mainly 27.5-32, boneless thigh meat high 60s, breast bone-in 91-101 and boneless 150-167. The Los Angeles negotiated WOG weighted average was 57.94 up .83 with the volume reported at 33 loads up 6 percent from last Monday level.

MIDWEST REGION BROILER/FRYER Final majority prices were TFEWR into Ohio cities, unchanged to slightly higher elsewhere from last Monday's final. Whole broiler/fryer market tone was steady. Offers were sufficient for the light buyer interest. Demand into all sectors was moderate to good, best into catering and fast food. Weights desirable. Floor stocks adequate to some instances ample. Parts trading was cautious to fair, best interest on dark meat and wings. Supplies were adequate in some instances long on white meat cuts. The market tone was steady on legs and cautiously steady on breasts and wings.

DELMARVA BROILER/FRYERS Movement of ready-to-cook whole birds was fair to moderate. Seller offerings were adequate and in generally good balance. Live supplies were moderate; weights were light to heavy, mostly desirable. Processor schedules were moderate to moderately heavy. Less than trucklot asking prices were unchanged at 59 to 68 cents. Trade sentiment was fully steady. In the parts complex, bone-in breasts remained readily available. Wings were fully adequate. Boneless skinless breasts were irregularly available, but at least adequate. Leg cuts were adequate to fully adequate.

*BROILER/FRYER CURRENT NEGOTIATED PRICES FOR IMMEDIATE DELIVERY INCLUDES MOSTLY MULTIPLE-DROP SHIPMENTS OF BRANDED AND WING TAGGED TO NEW YORK CITY FROM DELMARVA.

| BRANDED U.S. GRADE A | |
|----------------------|-------|
| RANGE | 56-71 |
| WEIGHTED AVERAGE | 61.55 |
| NO. OF BOXES | 9,050 |

*8 of 8 plants reporting.

NORTHEAST BROILER/FRYER PARTS Trucklot buying activity was generally cautious and selective entering the week. Offerings of breast items were noted as better balanced. Dark meat cuts were at least sufficient. Wings were adequate to available at times. Retail and distributive movement was fair at best. The market tone was steady. ICE PACKED BROILER/FRYER PARTS, DELIVERED TO FIRST RECEIVERS IN POOL TRUCKLOT AND TRUCKLOT QUANTITIES, CENTS PER POUND

| ITEM | NEGOTIATED TRADING | CURRENT AVG | WTD AVG | VOLUME /LBS |
|----------------------------|--------------------|-------------|---------|-------------|
| BREAST - B/S | | 160 | 162.55 | 514,240 |
| TENDERLOINS | 140-145 | | 148.62 | 182,500 |
| BREAST - WITH RIBS | 79-80 | | 85.08 | 190,960 |
| BREAST - LINE RUN | 79 | | 82.19 | 96,080 |
| LEGS | 34-35 | | 35.94 | 262,080 |
| LEG QUARTERS (BULK) | 25-26 | | 24.81 | 511,548 |
| DRUMSTICKS | 29-30 | | 33.67 | 96,311 |
| THIGHS | 27-28 | | 35.89 | 60,357 |
| B/S THIGHS | 68-69 | | 67.85 | 124,520 |
| WINGS (WHOLE) | 66-67 | | 76.00 | 239,420 |
| BACKS AND NECKS (STRIPPED) | 10-12 | | 12.39 | 34,360 |
| LIVERS (5 POUND TUBS) | 25-30 | | 26.02 | 8,640 |
| GIZZARDS (HEARTS) | 35-40 | | 41.03 | 17,640 |

INCLUDES NEW YORK CITY METROPOLITAN AREA, NORTHERN NEW JERSEY, MASSACHUSETTS, CONNECTICUT, RHODE ISLAND, AND PENNSYLVANIA (NORTHEAST OF HARRISBURG).

* TODAY'S NEGOTIATED SALES AS OF 11:30 A.M.
 ** WEIGHTED AVERAGE PRICE OF ALL GRADES AND BRANDS OF PRODUCT SHIPPED, OR TO BE SHIPPED AS OF 1:30 P.M.

ARKANSAS BROILER/FRYER PARTS F.O.B. DOCK OR EQUIVALENT, ICED-PACKED, PRICES SHOWN ARE DAY OF SHIPMENT (INCLUDES CURRENT AND PRIOR NEGOTIATIONS), TRUCKLOT AND LESS THAN TRUCKLOT VOLUME, CENTS PER POUND.

| ITEM | LBS (000) | RANGE | MAJORITY WT. | AVG |
|---------------------|-----------|---------------------|--------------|--------|
| BREAST - B/S | 903 | 147.00-163.00 | 153-163 | 157.99 |
| TENDERLOINS | 244 | 133.00-197.00 | - | 151.64 |
| BREAST - WITH RIBS | 200 | 80.00-105.00 | 81-84 | 86.62 |
| FRONT HALVES | 258 | 68.00-81.00 | 68 | 68.88 |
| LEGS | | NO TRADING REPORTED | | |
| LEG QUARTERS (BULK) | 887 | 20.00-23.00 | 21 | 20.88 |
| LEG QUARTERS (4/10) | 908 | 23.00-24.00 | - | 23.92 |
| WINGS (WHOLE) | 719 | 69.00-74.00 | 69 | 69.55 |
| DRUMSTICKS | | NO TRADING REPORTED | | |
| THIGHS | 1,360 | 17.00-22.00 | 20-21 | 20.07 |

ESTIMATED SLAUGHTER OF BROILER-FRYERS (IN THOUSANDS)

| | ESTIMATE | ACTUAL | AVG WTS | ACTUAL | AVG WTS |
|----------|-----------|--------|---------|------------|---------|
| | 06/23 | 06/19 | 06/19 | 06/16 | 06/12 |
| ALA | 4,166 | 3,962 | 5.10 | 4,028 | 5.20 |
| ARK | 5,373 | 5,328 | 4.93 | 5,241 | 4.92 |
| DELMARVA | 2,358 | 2,333 | 5.27 | 2,369 | 5.17 |
| KY-LA-TN | 1,985 | 1,971 | 4.83 | 1,959 | 4.87 |
| MISS | 3,022 | 3,111 | 5.39 | 3,019 | 5.34 |
| NC | 2,631 | 2,577 | 5.99 | 2,614 | 6.06 |
| TEXAS | 2,472 | 2,503 | 4.88 | 2,479 | 4.82 |
| TOTAL | 22,007 | 21,785 | 5.17 | 21,709 | 5.18 |
| MON | 22,007(A) | | | 21,709 (A) | |

(A) Weekly cumulative for states listed above.
 Broiler-fryer slaughter under federal inspection for 23-Jun 2003 is estimated to be 32,925,000 up 1.07 percent from a week ago and up 3.93 percent from a year ago.
 (Last week 32,577,000 last year 31,679,000)

SOUTHERN STATES BROILER/FRYER PARTS F.O.B. DOCK OR EQUIVALENT, ICED-PACKED, PRICES SHOWN ARE DAY OF SHIPMENT (INCLUDES CURRENT AND PRIOR NEGOTIATIONS), TRUCKLOT AND LESS THAN TRUCKLOT VOLUME, CENTS PER POUND.

| ITEM | POUNDS (000) | RANGE | MAJORITY | WTD AVG |
|---------------------|--------------|-------------------|----------|---------|
| BREAST - B/S | 910 | 150.00-226.00 | 152-155 | 155.31 |
| TENDERLOINS | 194 | 147.00-211.00 | 147-151 | 159.37 |
| BREAST - LINE RUN | 113 | 87.00-105.00 | 89-93 | 92.20 |
| FRONT HALVES | | TOO FEW TO REPORT | | |
| LEGS | 90 | 28.00-41.00 | 30-31 | 31.55 |
| LEG QUARTERS (BULK) | 641 | 21.00-24.00 | 21-22 | 22.05 |
| LEG QUARTERS (4/10) | 1,095 | 23.00-28.00 | 25-26 | 25.47 |
| WINGS (WHOLE) | 281 | 60.00-76.00 | - | 73.35 |
| WINGS (CUT) | 465 | 77.00-90.00 | 83-85 | 83.99 |
| DRUMSTICKS | 66 | 41.00-56.00 | - | 42.36 |
| THIGHS | | TOO FEW TO REPORT | | |
| B/S THIGHS | 93 | 64.00-73.00 | - | 68.75 |

WHOLE BODY INDEX BASED ON SOUTHERN STATES PARTS TRADING FOR JUNE 23, 2003 — F.O.B. DOCK.

| RANGE | TODAY'S AVERAGE | 5-DAY AVERAGE |
|---------------|-----------------|---------------|
| 49.50 - 53.50 | 51.62 | 51.36 |

MIDWEST REGION BROILER/FRYER ICE-PACKED POOL TRUCKLOT AND TRUCKLOT QUANTITIES DELIVERED TO: IL, IN, IA, KS, MI, MN MO, NE, ND, OH, SD, AND WI WEEK OF 23-JUN-2003 TO 27-JUN-2003 CENTS PER POUND

| | Price Per Lb. | Mostly |
|----------------------------|-----------------|-----------------|
| BREAST - B/S | 155.00 - 172.00 | 155.00 - 165.00 |
| BREAST - LINE RUN | 82.00 - 107.50 | 85.00 - 94.00 |
| LEGS | 32.00 - 41.00 | - |
| LEG QUARTERS (BULK) | 21.00 - 28.00 | 23.00 - 25.00 |
| DRUMSTICKS | 26.00 - 38.00 | - |
| THIGHS | 25.00 - 34.00 | - |
| WINGS (WHOLE) | 58.00 - 80.00 | 70.00 - 72.00 |
| BACKS AND NECKS (STRIPPED) | 10.00 - 17.00 | - |
| LIVERS | 30.00 - 40.00 | - |
| GIZZARDS (HEARTS) | 40.00 - 45.00 | - |

SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED POULTRY, DELIVERED TO RESTAURANTS AND INSTITUTIONS

| | RANGE |
|----------------------------------|-------|
| WOGS 2# & UP - WHOLE | 83 |
| WOGS 2# & UP - CUT UP 8&9 PIECES | 86-90 |
| FROZEN HENS 5# & UP | |
| FROZEN DUCKS | |
| FROZEN SQUABS | 589 |

DELIVERED TO RETAILERS IN SOUTHERN CALIFORNIA (L.A. AREA)

| | |
|------------------|-------|
| FRESH FRYERS | 89-95 |
| ROASTERS 4# & UP | 80-95 |
| HENS UNDER 5# | |
| HENS OVER 5# | 63 |
| DUCKS | |
| RABBITS-WHOLE | |
| RABBITS-CUT UP | |

SAN FRANCISCO PROCESSED POULTRY DELIVERED TO RESTAURANTS AND INSTITUTIONS

| | | |
|------------------|----------|---------|
| FRESH FRYERS | ICE PACK | 98-100 |
| | DRY PACK | 105-106 |
| ROASTERS 4# & UP | ICE PACK | 104-105 |
| | DRY PACK | 113 |
| HENS OVER 5# | DRY PACK | |
| | ICE PACK | 91-98 |
| DUCKS | | 155-166 |

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 20-JUNE-2003
 _____ PRICES _____ VOLUME _____
 (Cents per Pound)

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|-------------|--------|-------|-------|--------|
| 15% OR LESS | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

CHICKEN WITH SKIN ADDED _____ PRICES _____ VOLUME _____
 (Cents per Pound)

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|-------------|-------------|-------------|-----------|---------|
| 15% OR LESS | | | | |
| RANGE | 15.50-18.50 | 17.00 | 580,000 | 522,000 |
| WTD AVERAGE | 16.99 | 17.00 | | |
| 15-20% | | | | |
| RANGE | 15.50-16.50 | 11.00-15.00 | 1,584,000 | 304,000 |
| WTD AVERAGE | 16.16 | 12.53 | | |
| 20% OR MORE | | | | |
| RANGE | - | 11.00 | 82,000 | - |
| WTD AVERAGE | | 11.00 | | |

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

SOUTHEAST HEAVY LIVE HEN Majority prices were unchanged when compared to a week earlier. Demand was light to no better than fair for the fully adequate offerings. Finished product supplies were adequate. Processing schedules were reported as normal to instances heavy. The undertone was generally steady.

HEAVY TYPE HENS (7 POUNDS AND UP) *FINAL PRICE, CENTS PER LB., GENERALLY FOR SLAUGHTER THE WEEK OF 23-JUN-03.

| | RANGE | MAJORITY | WTD AVG |
|--------------------------|-------------------|----------|---------|
| AT FARM BUYER LOADING | 6.5-8.75 | 8-8.5 | 8.07 |
| AT FARM PRODUCER LOADING | TOO FEW TO REPORT | | |
| FOB PLANT | TOO FEW TO REPORT | | |

*WEIGHTS UNDER 7 LBS. SUBJECT TO DISCOUNT.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 20-JUNE-2003
 _____ PRICES _____ VOLUME _____
 (Cents per Pound)

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|-------------|--------|-------|-------|--------|
| 15% OR LESS | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

CHICKEN, WITH SKIN ADDED _____ PRICES _____ VOLUME _____
 (Cents per Pound)

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|-------------|-------------|-------------|-----------|---------|
| 15% OR LESS | | | | |
| RANGE | 14.00-19.00 | 13.00-17.00 | 181,600 | - |
| WTD AVERAGE | 16.50 | 16.21 | | |
| 15-20% | | | | |
| RANGE | 14.00-15.00 | 10.00-15.00 | 2,031,200 | 440,800 |
| WTD AVERAGE | 14.09 | 11.74 | | |
| 20% OR MORE | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

SOUTH CENTRAL HEAVY LIVE HEN Pricing remained generally unchanged from the past week. Demand was moderate for adequate offerings of raw materials. Schedules were normal.

HEAVY TYPE HENS (7 POUNDS AND UP) *
 FINAL PRICE, CENTS PER LB., GENERALLY FOR SLAUGHTER THE WEEK OF 23-JUN-03

| | RANGE CENTS/LB. | MAJORITY | WTD AVG |
|-----------------------|-----------------|----------|---------|
| AT FARM BUYER LOADING | 6-11 | 8-8.5 | 8.48 |

*WEIGHTS UNDER 7 LBS. SUBJECT TO DISCOUNT.

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