



USDA BROILER MARKET NEWS REPORT

WEDNESDAY
JULY 23, 2003
VOL. 50 NO. 87

ISSN 1522-0567

U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL BROILER MARKET-AT-A-GLANCE



Trade sentiment in the East was irregular ranging at least steady on heavier weight product, but no better than steady on lighter weights; in all other areas, markets were steady. Retail demand was slow to fair, food service was mostly light to moderate. Supplies of all sizes varied, but overall, were obtainable. In the parts structure, all items were at least adequate or available with breast items and wings in a better balance. In production areas, live supplies were moderate. Weights were mostly desirable, but trending lighter in areas affected by hotter weather.

GEORGIA F.O.B. DOCK PRICES The Georgia f.o.b. dock quoted price on broilers/fryers for next week's trading advanced .25 cents to 67.75 cents based on full truck load lots of ice-packed USDA grade "A" sized 2 1/2 to 3 pound birds. This compares to 64.25 cents last year on July 24, 2002.

Georgia f.o.b. dock quoted prices on ice-packed parts for next week's trading.

ITEM	DOCK PRICE (CENTS PER POUND)
LINE RUN TENDERS	202.50
BREASTS - B/S	195.00
BREASTS - WHOLE	102.00
THIGH MEAT - B/S	77.50
LEG QUARTERS	31.00
WINGS	72.00

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

SOUTHERN Trade sentiment was generally steady. Demand for mid-week was light to moderate into all channels with ads and fast food promotions best. Supplies were sufficient for trade needs. In the parts structure, movement was fair at best. Breast items and wings were adequate to better balanced, but still available. Dark meat was in the best position, aided in part by export interest. In production areas, live supplies were moderate at mixed, but mostly desirable weights.

NORTHEAST Trucklot buying interest on ready-to-cook whole broiler/fryers was at best fair as dealers limited purchases to regular commitments. Offerings of the 3-pound and lighter birds were available to fully adequate. The heavier sizes were closely cleared. Movement through retail and distributive channels was noted as light to fair. The market tone was at least steady on the 3.5 pound and larger birds, no better than steady on the lighter weights. In the parts complex, availability of breast items and wings improved but were currently steady. Leg quarters were clearing, other items were generally reported as sufficient for full needs.

MIDWEST Whole fryer market tone remained steady. Offerings of additional whole fryers were sufficient for the fair buyer demand. Retail movement continued at a lackluster pace with whole birds clearing best. Food service trade was spotty, mostly light to moderate. Floor stocks were adequate to fully adequate. Weights were mostly desirable. Offerings of parts items were generally in balance with trade needs. Buyer interest was marginal as most were focused on current reduction. The market tone was unsettled on boneless/skinless breasts with all other parts mostly steady.

WESTERN The market tone was generally steady. Offering of lighter weight whole body product building in some areas due to hotter weather conditions elsewhere adequate, heavier weight product fully adequate. Retailer demand was moderate to good best for parts. Floor stocks adequate overall.

CHICK PLACEMENT AND EGG SET TOTAL

19 STATES WEEK ENDING 07/19/03	2003	2002	PERCENT CHANGE PREVIOUS YEAR
EGGS SET	206,346	209,219	-01
CHICKS PLACED	165,293	166,514	-01

BROILER EGGS SET IN 19 SELECTED STATES DOWN 1 PERCENT

Commercial hatcheries in the 19-State weekly program set 206 million eggs in incubators during the week ending July 19, 2003. This was down 1 percent from the eggs set the corresponding week a year earlier. Average hatchability for chicks hatched during the week was 83 percent. Average hatchability is calculated by dividing chicks hatched during the week by eggs set three weeks earlier.

BROILER CHICKS PLACED DOWN 1 PERCENT

Broiler growers in the 19-State weekly program placed 165 million chicks for meat production during the week ending July 19, 2003. Placements were down 1 percent from the comparable week a year earlier. Cumulative placements from December 29, 2002 through July 19, 2003 were 4.88 billion, down 1 percent from the same period a year earlier.

WEEKLY FRYERS AVAILABLE FOR MARKETING

Based on the preliminary chick placements, the number of fryers available for the marketing during the week ending 30-Aug-03 is estimated at 154.0 million head. This compares to 156.8 million head the previous week and to 157.2 million head the same week a year ago, when the slaughter was 167.6 million head and the composite weighted average 56.31 cents per pound.

JULY 22, 2003

SOUTHERN STATES BROILER/FRYER PARTS

JULY 23, 2003

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.

POUNDS				WTD	POUNDS				WTD
ITEM	(000)	RANGE	MAJORITY	AVG	ITEM	(000)	RANGE	MAJORITY	AVG
BREAST - B/S	914	152.00-235.00	154-156	157.53	BREAST - B/S	874	152.00-234.00	153-158	155.73
TENDERLOINS	229	135.00-211.00	142-147	150.50	TENDERLOINS	225	135.00-212.00	142-145	150.50
BREAST - LINE RUN	95	89.00-109.00	90-92	93.05	BREAST - LINE RUN	95	88.00-111.00	90-92	92.84
FRONT HALVES	132	78.00-83.00	-	80.05	FRONT HALVES	TOO FEW TO REPORT			
LEGS	120	29.00-47.00	30-32	32.35	LEGS	92	29.00-47.00	30-32	33.39
LEG QUARTERS (BULK)	601	24.00-27.00	25	24.94	LEG QUARTERS (BULK)	656	24.00-27.00	24-25	24.86
LEG QUARTERS (4/10)	1,059	26.00-33.00	27-28	27.72	LEG QUARTERS (4/10)	699	26.00-33.00	26-28	27.31
WINGS (WHOLE)	276	54.00-76.50	-	72.53	WINGS (WHOLE)	276	54.00-76.00	-	72.17
WINGS (CUT)	490	71.00-82.00	74-77	75.95	WINGS (CUT)	425	71.00-82.00	74-77	75.82
DRUMSTICKS	TOO FEW TO REPORT				DRUMSTICKS	69	47.00-60.00	-	48.70
THIGHS	TOO FEW TO REPORT				THIGHS	TOO FEW TO REPORT			
B/S THIGHS	120	62.00-82.00	-	72.83	B/S THIGHS	105	65.00-85.00	-	75.68

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

RANGE	TODAY'S AVERAGE	RANGE	TODAY'S AVERAGE	5-DAY AVERAGE
51.00 - 55.00	52.50	51.00 - 55.00	52.60	52.59

The Index is intended solely as an indicator of values for commodity-type product and does not represent industry's willingness to sell or ability to buy.

NORTHEAST BROILER/FRYER PARTS

Trucklot buying activity was light and unaggressive with most traders reporting business as slow. However, offerings of breast items and wings were adequate to available but in a better balance than a day earlier. Boneless dark meat was generally sufficient, but leg quarters were well cleared. Retail and distributive movement was limited. The market tone was usually no better than steady, however some improvement was noted on b/s breast and irregular on other items.

*PRICES PAID PER LB, ICE PACKED AND CO2 PACKED BROILER/FRYER PARTS, DLIVRD TO FIRST RCVRS IN POOL TRUCKLOT AND TRUCKLOT QUANTITIES

JULY 22, 2003

JULY 23, 2003

ITEM	CURRENT NEG TRADING*	WTD AVG**	VOL/LBS	ITEM	CURRENT NEG TRADING*	WTD AVG**	VOL/LBS
BREAST - B/S	165	165.97	664,640	BREAST - B/S	165	166.07	518,600
TENDERLOINS	140	139.26	138,240	TENDERLOINS	140	139.43	121,500
BREAST - WITH RIBS	84-85	89.69	219,080	BREAST - WITH RIBS	84-85	88.12	188,560
BREAST - LINE RUN	84	84.29	68,840	BREAST - LINE RUN	84-37	84.70	58,560
LEGS	37-38	35.53	265,720	LEGS	37-38	36.87	292,880
LEG QUARTERS (BULK)	25-26	26.90	561,628	LEG QUARTERS (BULK)	25-26	26.78	291,581
DRUMSTICKS	33-34	37.07	240,630	DRUMSTICKS	33-34	36.25	131,520
THIGHS	27-28	37.24	63,080	THIGHS	26-27	39.86	43,200
B/S THIGHS	69-70	72.20	87,090	B/S THIGHS	69-70	73.82	81,380
WINGS (WHOLE)	62-63	67.72	172,640	WINGS (WHOLE)	62-63	68.62	195,280
BACKS AND NECKS (STRIPPED)	10-12	12.22	41,360	BACKS AND NECKS (STRIPPED)	10-12	11.94	29,840
LIVERS (5 POUND TUBS)	25-30	25.52	18,645	LIVERS (5 POUND TUBS)	25-30	19.03	50,080
GIZZARDS (HEARTS)	35-40	41.04	21,860	GIZZARDS (HEARTS)	35-40	40.95	23,110

INCLUDES: NY CITY METRO. AREA, RI, NORTHERN NJ, MA, CT, PA (NORTHEAST OF HARRISBURG). * TODAY'S NEG. SALES AS OF 11:30 A.M.

** WTD AVG PRICE OF ALL GRADES AND BRANDS OF PRODUCT SHIPPE, OR TO BE SHIPPED AS OF 1:30 P.M.

ESTIMATED SLAUGHTER OF BROILER-FRYERS (IN THOUSANDS)

	ESTIMATED		ACTUAL		AVG WT		ACTUAL		AVG WTS		
	07/23	07/22	07/21	07/18	07/21	07/18	07/16	07/14	07/16	07/14	
ALA	4,033	4,115	4,070	3,939	5.17	4.99	4,022	5.26			
ARK	5,182	5,133	4,866	5,319	4.89	4.81	5,133	5.00			
DELMARVA	2,307	2,094	2,239	2,208	5.33	5.29	2,267	5.37			
KY-LA-TN	1,969	1,943	1,949	2,316	4.77	4.62	1,839	4.83			
MISS	3,010	3,003	3,010	2,738	5.31	5.27	2,879	5.40			
NC	2,553	2,280	2,477	2,659	6.09	6.06	2,533	6.07			
TEXAS	2,496	2,463	2,462	2,587	4.95	4.98	2,363	5.08			
TOTAL	21,550	21,031	21,073	22,027	5.19	5.11	21,036	5.27			
MON-FRI	64,069(A)				63,464(A)						

(A) Weekly cumulative for states listed above. Broiler-fryer slaughter under federal inspection for 23-Jul 03 and 24-Jul-03 is estimated to be 32,241,000 up 2.14 percent from a week ago and down 0.8 percent from a year ago.

(Last week 31,567,000; last year 32,489,000)

Weekly broiler-fryer slaughter under federal inspection for the weekending 24-Jul-03 is estimated to be 155,973,000 head down 2 percent from a week ago, and down 3 percent from a year ago

(Last week 159,849,000 Last year 159,974,000)

SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED

POULTRY, DELIVERED TO RETAILERS	RANGE
FRESH FRYERS	91-97
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	RANGE
FRESH FRYERS	DRY PACK 107-108
	ICE PACK 100-102
ROASTERS 4# & UP	DRY PACK 113
	ICE PACK 104-105
HENS OVER 5#	ICE PACK 91-98
	DRY PACK
DUCKS	155-166

ESTIMATED U.S. LIVE POULTRY SLAUGHTER

UNDER FEDERAL INSPECTION FOR WEEK ENDING 26-JUL-03

CLASS	CURRENT WEEK		PREVIOUS WEEK
	07/26/03 (1)	07/19/03	
	THOUSAND HEAD		
BRO-FRY	161,842 (2)	162,640	
LT HENS	1,217	1,244	
HVY HENS	1,548	1,698	
CHECK TOTAL	164,607	165,582	

(1)ESTIMATED

(2)The estimated number of broiler-fryers available for slaughter the week ending 26-Jul-03 is 162.6 million head compared to 163.2 million head slaughtered the same week last year. The estimated U.S. slaughter this week is 162.2 million head or 0.4 million less than estimated available. For week of 02-Aug-03 the estimated available is 162.7 million head.

WEEKLY COLD STORAGE HOLDINGS-SELECTED STGE CENTERS (INCL GOVT STOCKS) (IN THOUSANDS)

	PROCESSED TURKEY		PROCESSED POULTRY	
	LBS		LBS	
AM 07/21/03	217,974	55,745		
AM 07/01/03	206,919	57,844		
CHG	11,055	-2,099		
PCT CHG	5	-4		

COLD STORAGE MOVEMENT (IN THOUSANDS)

	PROCESSED TURKEYS			PROCESSED POULTRY		
	7/21/03	7/14/03	7/22/02	7/21/03	7/14/03	7/22/02
PACIFIC						
COAST	15,112	15,614	26,056	4,716	7,233	5,488
LOS ANGELES	164	142	350	2,765	2,636	3,588

CENTRAL MISCELLANEOUS POULTRY RTC HENS

READY-TO-COOK PRICES NEGOTIATED FOR DELIVERY TO FIRST RECEIVERS, U.S. GRADE A AND PLANT GRADE, 5 LBS. AND UP, FOR WEEK OF JULY 21, 2003

HENS	ICE PACKED (12 PER BOX)	RANGE
		62-64
	VACUUM PACKED (6-9 PER BOX)	62-79

HACKETTSTOWN POULTRY SALES

	LOW HIGH AVG			FOR 7/22/03		
	LOW	HIGH	AVG	LOW	HIGH	AVG
HEAVY FOWL lb.	.25	1.00	.36	HEAVY FOWL ea.	-	.75
LIGHT FOWL lb.	.30	.65	.43	LIGHT FOWL ea.	-	2.00
MIXED FOWL lb.	-	-	-	MIXED FOWL ea.	-	-
BANTAMS lb.	-	-	-	BANTAMS ea.	.30	4.25
BROILERS lb.	-	-	-	BROILERS ea.	-	.50
ROASTERS lb.	-	-	-	ROASTERS ea.	-	-
FRYERS lb.	-	-	-	FRYERS ea.	-	-
CHICKS lb.	-	-	-	CHICKS ea.	.50	1.30
PULLETS lb.	-	-	-	PULLETS ea.	4.25	6.50
BUNNIES lb.	-	.60	-	BUNNIES ea.	.75	1.25
ROOSTERS lb.	.50	.95	.60	ROOSTERS ea.	-	4.50
GEESE lb.	-	-	-	GEESE ea.	2.75	3.00
TURKEYS lb.	-	.25	-	TURKEYS ea.	-	10.00
DUCKS lb.	.45	1.20	.72	DUCKS ea.	3.50	3.75
RABBITS lb.	.50	1.45	1.16	RABBITS ea.	-	1.75
PIGEONS lb.	-	-	-	PIGEONS ea.	2.25	4.25
GUINEA FOWL lb.	-	-	-	GUINEA FOWL ea.	-	-
DUCKLINGS lb.	-	-	-	DUCKLINGS ea.	-	3.80
GUINEA KEETS ea.	-	-	-	CALL DUCKS ea.	-	-
SILKIES ea.	-	.50	-	GOSLINGS ea.	-	-
GUINEA PIGS ea.	-	-	-	TURKEY POULTS ea.	-	-

TOTAL COOPS 99

MAJOR WHOLESALE MARKETS - Mexico City

Cents per pound for the week ending July 18, 2003

	Whole		Legs	Necks,Back	Livers/	Hens
	Chickens	Breasts	w/ Thighs	&Wings	Gizzards	
RAYON						
Low	58.27	131.43	87.62	13.14	17.52	56.95
High	63.08	140.19	96.38	17.52	21.90	56.95
Mostly	61.33	140.19	96.38	13.14	17.52	56.95
SAN JUAN						
Low	58.27	131.43	87.62	8.76	13.14	56.95
High	62.65	140.19	96.38	17.52	17.52	56.95
Mostly	61.33	131.43	87.62	13.14	17.52	56.95
NEW SAN JUAN						
Low	58.27	131.43	87.62	13.14	13.14	59.14
High	62.65	140.19	96.38	17.52	17.52	59.14
Mostly	61.33	131.43	92.00	13.14	17.52	59.14
BECERRA						
Low	58.70	131.43	87.62	13.14	13.14	59.14
High	63.52	140.19	96.38	17.52	17.52	59.14
Mostly	61.33	140.19	92.00	13.14	17.52	59.14

DELMARVA Movement of ready-to-cook whole birds remained centered on the generally well balanced to tight supply of 3.50 and 4.00 pound sizes; 2.50 and 3.00 pound sizes were readily available and slow to clear. Live supplies were mostly moderate; weights were desirable to light. Processing schedules were about moderate. Less than trucklot asking prices were unchanged at 59 to 68 cents. Trade sentiment was at least steady on the larger sizes; barely steady to weak on the lighter. In the parts complex, supplies were adequate for immediate delivery.

*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	52-73
WEIGHTED AVERAGE	62.06
NO. OF BOXES	7,517

*8 of 8 plants reporting.

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