



USDA TURKEY MARKET NEWS REPORT

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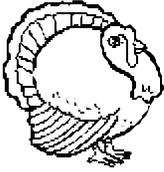
NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone on hens and 16-24 lb. toms was steady with instances of seller nervousness noted. Demand light on frozen whole turkeys as buyers continues to take a wait and see position for November holiday needs. The lack of buyer inquiry has resulted in some seller concern. Offerings of frozen whole turkey ranged light to adequate with supplies in the East held with the most confidence. Bulk meat demand fair on fresh mechanically separated turkey, balance meat and parts demand light.

EXPORT MARKET HIGHLIGHTS

Trading was heavy on frozen thigh meat and drums, balance light. Renewed export interest was noted from Russia and continued demand was noted from Africa, Asia, Eastern Europe and Mexico. Some increased confidence was noted on dark meat items as a result of the continued trading activity.



WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 26, 2002**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL PER	VOLUME (000)	DEL PER
8-16 LB HENS									
EASTERN REGION 3/	66-67	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	65-66	-	-	-	-	-	-	-	-
WESTERN REGION 5/	65-67	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	60-61	-	-	-	-	-	-	-	-
CENTRAL REGION	59-60	-	-	-	-	-	-	-	-
WESTERN REGION	59-61	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 25, 2002**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL PER	VOLUME (000)	DEL PER
8-16 LB HENS									
EASTERN REGION 3/	66-67	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	65-66	-	-	-	72.00	180	OCT	1720	JUL-SEP
WESTERN REGION 5/	65-67	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	60-61	-	-	-	-	-	-	-	-
CENTRAL REGION	59-60	-	-	-	66.00	60	OCT	920	JUL-SEP
WESTERN REGION	59-61	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days. 3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK ENDING JULY 26, 2002	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	66.00	68.00	65.00
CENTRAL REGION	65.50**	66.00	65.00**
WESTERN REGION	66.00**	66.80**	66.00**
16-24 LB TOMS			
EASTERN REGION	60.00	62.00	62.50**
CENTRAL REGION	59.50**	60.00	61.00**
WESTERN REGION	59.00	59.00	62.00**

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	71
FROZEN TURKEYS Y TOMS 14-24#	66
FROZEN TURKEYS Y TOMS 24-28#	68-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	89-119
TURKEYS Y TOMS UNDER 22#	89-119
TURKEYS Y TOMS 22-24#	85-105
TURKEYS Y TOMS 24-26#	84-105
TURKEYS Y TOMS 26 LBS & OVER	102-105

**FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION, CENTS
PER POUND, WEEK OF 29-JUL-2002**

	<u>(8-16#)</u>		<u>(16-24#)</u>	
	<u>HENS</u>	<u>LBS</u>	<u>TOMS</u>	<u>LBS</u>
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	71.63	32	65.33	15
SALES (PROMOTIONS NOT INCLUDED)	71.63	32	65.33	15
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

**TURKEY MOVEMENT TREND
(IN THOUSAND POUNDS)****SLAUGHTER-CERTIFIED RTC TURKEYS**

JUNE	431,206*
JULY 1-20, 2002	297,802*
To date 2002	2,867,209*
To date 2001	2,860,880*

*PRELIMINARY

**NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS
BY GEOGRAPHICAL AREAS WEEK ENDING 20-Jul-2002**

(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
	<u>-THOUSAND HEAD-</u>	<u>PCT</u>	<u>AVG</u>	<u>OLD</u>	<u>AVG</u>
		<u>CHG</u>	<u>LIVE</u>	<u>BANDED</u>	<u>LIVE</u>
		<u>PW</u>	<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>
N EAST	782	17	22.31	(A)	783 22.31
SATL	960	16	25.30	(A)	961 25.30
N CENT	2,324	-3	30.07	(A)	2,325 30.07
S CENT	478	-6	22.31	(A)	479 22.31
WEST	419	-5	26.22	(A)	419 26.22
U.S. TOTAL	4,963(B)	2	26.86	4	4,967 26.86
TO-DATE					
2002	131,261(B)			232	131,493
TO-DATE					
2001	136,214(B)			348	136,562

(A) Not published to avoid disclosing individual operations.
(B) Number of young banded breeder turks included: this week 34,000 for the year 1,364,000; last year to date 1,129,000.**LIVE TURKEYS SLAUGHTERED WEEK ENDING 20-Jul-2002**

	<u>YOUNG</u>	<u>TOMS</u>	<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>		<u>BREEDERS</u>		
	<u>THOUSANDS</u>				
HEAD	2,109	2,820	34	4	4,967
AVG WT	15.98	35.01	24.38	42.16	26.86
LAST WEEK	1,836	2,950	69	19	4,874
SAME WK YR AGO	2,000	2,803	45	24	4,872
AVG WT	16.29	34.12	24.27	27.62	26.67
TO-DATE/2002	52,489	77,408	1,364	232	131,493
TO-DATE/2001	57,737	77,348	1,129	348	136,562

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 25 JULY 2002.

Fresh white meat trade sentiment was steady to barely steady. Demand light at best with some further processors noting a less aggressive buyer interest in cooked and deli items. Offerings available. Frozen white meat trade sentiment was steady to instances weak. Demand slow for the adequate to instances burdensome offerings. Domestic and export trading centered on a moderately heavy volume of frozen thigh meat and a light volume of tom drums for export. Some frozen course grind 90% lean bulk ground turkey traded at 55 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	95.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/	154.00		154.00	10
BREASTS, 4-8 LBS PLANT GRADE 2/		F	91.00	240
DRUMSTICKS, TOM		F	18.26	432
DRUMSTICKS, TOM—FRESH		W	21.00	40
DRUMSTICKS, HEN	19.00-20.00		19.56	36
WINGS, FULL-CUT, TOM	22.00		22.00	2
WINGS, FULL-CUT, HEN	22.00-23.00		22.67	30
WINGS, V-TYPE, TOM	28.00		28.00	120
WINGS, V-TYPE, HEN	52.00		52.00	20
NECKS, TOM	15.00		15.00	2
NECKS, HEN	14.00		14.00	10
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM—FRESH 3/	159.00		159.00	40
THIGH MEAT		F	49.00	14
THIGH MEAT—FRESH				
BREAST TRIM MEAT		F	84.50	80
SCAPULA MEAT		F	77.25	80
TENDERLOINS	121.00		121.00	14
DESTRAPPED TENDERS	116.00		116.00	80
DESTRAPPED TENDERS—FRESH		M	133.00	80
WING MEAT WITH SKIN		M	59.00	40
MECHANICALLY SEPARATED 4/		W	18.00	40
MECHANICALLY SEPARATED—FRESH 4/		W	19.00	80
EXPORT TRADING				
DRUMSTICKS, TOMS	20.00-21.00		20.25	212
WINGS FULL-CUT - TOMS		R	19.50	40
WINGS, V-TYPE, TOM		W	26.00	52
TAILS		T	15.00	240
MECHANICALLY SEPARATED 4/		F	18.67	60
THIGH MEAT - FROZEN	39.00-50.00		43.59	788

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 26 JULY 2002.

The undertone on tom bulk parts was mixed. The market was active on tom drums for export at steady to lower trending price levels with interest noted mostly from Mexico and Asia, domestic light. The increased export activity on drums has resulted in some sellers' inventories becoming better balanced and instances of increased confidence in the market. The market on tom wings was steady to instances weak with export trading noted on 2-joints at lower trending prices. Demand light for the adequate to ample offerings. Hen and tom neck market slow for the readily available offerings. The market was firm on hen 2-joint wings, steady to fully steady on hen full wings, and steady on hen drums. Domestic trading was slow on all items. Export trading was heavy on drums and thigh meat, balance light. The renewed export interest from Russia and demand from Eastern Europe, Africa, Asia and Mexico has resulted in some increased confidence in the market on dark meat items.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	WEEKLY
					WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	99.00		99.00	80	97.67	120
BREASTS, 4-8 LBS GRADE A—FRESH 2/		R	154.00	10	155.33	30
BREASTS, 4-8 LBS PLANT GRADE 2/		F	91.00	240		
DRUMSTICKS, TOM	19.00-22.00		20.49	132	20.49	132
DRUMSTICKS, TOM—FRESH	21.00		21.00	40	21.00	80
DRUMSTICKS, HEN	21.00		21.00	40	20.55	116
WINGS, FULL-CUT, TOM	21.00-23.00		21.68	156	21.68	158
WINGS, FULL-CUT, HEN	22.00		22.00	40	22.18	110
WINGS, V-TYPE, TOM		R	28.00	120	28.29	280
WINGS, V-TYPE, HEN	54.00		54.00	12	54.00	72
NECKS, TOM	13.00-15.00		13.60	93	13.63	95
NECKS, HEN		R	14.00	10	14.00	10
BREASTS, B/S, TOM 3/	133.00		133.00	40	133.00	40
BREASTS, B/S, TOM—FRESH 3/	155.00-159.00		157.25	320	157.34	581
THIGH MEAT	49.00		49.00	10	49.00	10
THIGH MEAT—FRESH	50.00-51.00		50.44	36	50.44	36
BREAST TRIM MEAT		F	84.50	80		
SCAPULA MEAT	77.50-79.00		78.50	120	78.50	120
TENDERLOINS		R	121.00	14	121.00	14
DESTRAPPED TENDERS		R	116.00	80	116.00	160
DESTRAPPED TENDERS—FRESH		M	133.00	80	133.00	80
WING MEAT WITH SKIN	58.00		58.00	24	58.63	64
MECHANICALLY SEPARATED 4/	16.50-17.00		16.75	80	17.25	160
MECHANICALLY SEPARATED—FRESH 4/	20.00		20.00	160	18.38	1,160
EXPORT TRADING						
DRUMSTICKS, TOMS	19.00-21.00		19.67	944	19.99	2,476
WINGS FULL-CUT - TOMS	22.00		22.00	40	22.00	40
WINGS, V-TYPE, TOM	26.50		26.50	208	26.40	260
TAILS		T	15.00	240	15.00	240
MECHANICALLY SEPARATED 4/		F	18.67	60		
THIGH MEAT - FROZEN	42.00-55.50		47.75	1,490	47.45	3,056

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.