



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone was generally steady on frozen hens and toms. Fresh turkeys was mostly steady with some reporting a weak undertone. Holiday demand mostly for fill-in basis. Fair to good trading centered on frozen packer labels. Frozen offerings ranged from adequate in the West to short or barely adequate on toms in the East and parts of the Midwest. Bulk parts and meat demand was seasonally slow.



EXPORT MARKET HIGHLIGHTS

Demand was light to moderate with interest noted for frozen tom drums and thigh meat. Trading centered on light volumes of frozen thigh meat and moderate volume of mechanically separated turkey. Offerings mixed.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) NOVEMBER 21, 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/	68-72	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	67-72	-	-	-	-	-	-	-	-
WESTERN REGION 5/	68-72	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	58-63	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	59-63.5	-	-	-	-	-	-	-	-
WESTERN REGION 5/	55-61	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) NOVEMBER 22, 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/	68-72	70-70.5	70.43	24.00	-	-	-	-	-
CENTRAL REGION 4/	67-72	-	-	-	-	-	-	-	-
WESTERN REGION 5/	68-72	68	68.00	720	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	58-63	63	63.00	240	-	-	-	-	-
CENTRAL REGION 4/	59-63.5	-	-	-	-	-	-	-	-
WESTERN REGION 5/	55-62	60-62	60.69	610	-	-	-	-	-

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 OF NOV 22, 2002	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	70.23	70.50	73.33
CENTRAL REGION	69.44	70.12	74.00
WESTERN REGION	68.00	70.04	73.94
16-24 LB TOMS			
EASTERN REGION	60.36	60.00	68.00
CENTRAL REGION	61.56	63.49	67.64
WESTERN REGION	60.69	55.00	67.50

**BASED ON OFFERS

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

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96-107
FRESH TURKEYS Y TOMS 14-24#	96-107
FROZEN TURKEYS Y HENS 8-16#	73
FROZEN TURKEYS Y TOMS 14-24#	66
FROZEN TURKEYS Y TOMS 24-28#	73-86

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

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	119-125
TURKEYS Y TOMS 22-24#	105-125
TURKEYS Y TOMS 24-26#	105-129
TURKEYS Y TOMS 26 LBS & OVER	105-129

FRESH TURKEYS WITH TIMERS OR EQUIVALENT****SPECIAL REPORT - SEE CENTRAL AND WESTERN REGIONS**U.S. GRADE A, DELIVERED FIRST RECEIVERS, CENTS PER POUND,
WEEK OF 25-NOV-2002

	(8-16#)	(16-24#)		
	HENS	LBS TOMS	LBS	
<u>EASTERN REGION</u>	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	76.90	1,132	73.30	362
SALES (PROMOTIONS NOT INCLUDED)	76.90	1,132	73.30	362
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

CENTRAL REGION

SALES (PROMOTIONS INCLUDED)	80.72	3,170	77.76	2,490
SALES (PROMOTIONS NOT INCLUDED)	80.72	3,170	77.76	2,490
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

WESTERN REGION

SALES (PROMOTIONS INCLUDED)	81.00	1,600	79.00	1,200
SALES (PROMOTIONS NOT INCLUDED)	81.00	1,600	79.00	1,200
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 16-Nov-2002
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

	<u>YOUNG TURKEYS</u>				<u>TOTAL TURKEYS</u>	
	PCT	AVG	OLD	AVG		
	CHG	LIVE	BANDED	LIVE		
<u>-THOUSAND HEAD-</u>	<u>PW</u>	<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>		
N EAST	989	2	21.57	(A)	998	21.57
SATL	848	-18	31.45	(A)	857	31.45
N CENT	2,571	1	29.87	(A)	2,580	29.87
S CENT	552	-1	20.59	(A)	560	20.59
WEST	736	-12	22.92	(A)	744	22.92
U.S. TOTAL	5,696(B)	-426.87	43	5,739	26.87	
TO-DATE						
2002	216,193(B)			509	216,702	
TO-DATE						
2001	224,421(B)			536	224,957	

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 64,000; for the year 2,519,000; last year to date 2,108,000.

TURKEY MOVEMENT TREND

(IN THOUSAND POUNDS)

SLAUGHTER-CERTIFIED RTC TURKEYS

OCTOBER	515,338*
NOVEMBER 1-16, 2002	273,473*

To date 2002	4,638,366*
To date 2001	4,660,100*

*PRELIMINARY

LIVE TURKEYS SLAUGHTERED

WEEK ENDING 16-Nov-2002

	<u>YOUNG</u>		<u>OLD</u>	<u>TOTAL</u>	
	<u>HENS</u>	<u>TOMS</u>			
	<u>THOUSANDS</u>				
HEAD	2,392	3,240	64	43	5,739
AVG WT	16.24	34.76	24.37	27.81	26.87
LAST WEEK	2,585	3,268	87	30	5,970
SAME WK YR AGO	2,376	3,150	39	6	5,571
AVG WT	15.87	33.14	24.10	25.93	25.71
TO-DATE/2002	86,143	127,531	2,519	509	216,702
TO-DATE/2001	93,972	128,341	2,108	536	224,957

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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 21 NOVEMBER 2002.

The undertone on tom drums was mostly steady with some sellers showing trading at higher price levels while buyers still note product availability. The undertone tom necks and full-cut wings was steady at best, tom 2-joint wings barely steady to weak and the balance of parts mostly steady. Domestic bulk parts demand was slow due in part to the upcoming long holiday weekend with some processors going to be down 4 days. Export demand was slow to instances fair with the best interest noted on drums and some improved activity noted on thigh meat. For export: hen drums 17-19, scapula 81 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/				
BREASTS, 4-8 LBS GRADE A—FRESH 2/	154.00		154.00	40
BREASTS, 4-8 LBS PLANT GRADE 2/		T	92.00	40
DRUMSTICKS, TOM		T	21.00	27
DRUMSTICKS, TOM—FRESH		W	21.00	40
DRUMSTICKS, HEN		T	19.80	50
WINGS, FULL-CUT, TOM	23.00		23.00	40
WINGS, FULL-CUT, HEN	22.00		22.00	40
WINGS, V-TYPE, TOM		F	23.33	60
WINGS, V-TYPE, HEN		F	48.00	12
NECKS, TOM		T	14.43	21
NECKS, HEN		F	13.00	14
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM—FRESH 3/		W	157.44	90
THIGH MEAT		F	53.38	78
THIGH MEAT—FRESH		F	54.00	40
BREAST TRIM MEAT		W	88.50	80
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS		W	113.00	20
DESTRAPPED TENDERS—FRESH		M	138.00	6
WING MEAT WITH SKIN		M	51.00	40
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED—FRESH 4/		W	16.71	643
EXPORT TRADING				
DRUMSTICKS, TOMS	20.00-24.00		21.86	172
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	23.00		23.00	104
TAILS		T	17.00	80
MECHANICALLY SEPARATED 4/		T	19.00	60
THIGH MEAT - FROZEN	50.00-57.00		52.49	324

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 22 NOVEMBER 2002.

The trade sentiment on tom breast meat and frozen destrapped tenderloins was steady to instances weak, breast trim steady, barely steady on the balance of white meat items. Demand seasonally slow as the industry concentrates on Thanksgiving Holiday needs. Offerings available. Domestic bulk parts demand was light with trading centered tom full-cut wings. Offerings of bulk parts ranged from ample on tom 2-joint wings to mostly adequate on the balance of items with hen 2-joint wings held with the most confidence. Some spot weakness was noted on tom necks and tom full-cut wings. Domestic trading was light on all items. Export trading centered on a fair volume of frozen mechanically separated turkey for December shipments, balance light. Non basted rib breasts for domestic: Grade A 8-10 lb. 99 and 10-12 lb. 110, plant grade 12-14 lb. 100, and Grade A fresh 13-16 lb. WOGS traded at 75 cents delivered. Livers traded at 23.25 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/						
BREASTS, 4-8 LBS GRADE A—FRESH 2/	169.00		169.00	240	137.64	5,280
BREASTS, 4-8 LBS PLANT GRADE 2/		T	92.00	40	92.00	40
DRUMSTICKS, TOM	20.00-21.00		20.20	100	20.37	127
DRUMSTICKS, TOM—FRESH	20.00		20.00	7	20.85	47
DRUMSTICKS, HEN		T	19.80	50	19.80	50
WINGS, FULL-CUT, TOM	20.00-22.00		21.20	200	21.50	266
WINGS, FULL-CUT, HEN		R	22.00	40	21.69	58
WINGS, V-TYPE, TOM		F	23.33	60		
WINGS, V-TYPE, HEN		F	48.00	12		
NECKS, TOM	15.00		15.00	4	14.61	31
NECKS, HEN		F	13.00	14		
BREASTS, B/S, TOM 3/						
BREASTS, B/S, TOM—FRESH 3/		W	157.44	90	155.15	130
THIGH MEAT	54.50		54.50	8	54.50	8
THIGH MEAT—FRESH	58.00		58.00	40	58.00	40
BREAST TRIM MEAT	88.00		88.00	40	88.33	120
SCAPULA MEAT	80.00-82.00		80.29	49	80.29	49
TENDERLOINS						
DESTRAPPED TENDERS	113.00		113.00	20	113.00	40
DESTRAPPED TENDERS—FRESH		M	138.00	6	138.00	6
WING MEAT WITH SKIN	50.00-53.00		51.50	80	51.33	120
MECHANICALLY SEPARATED 4/						
MECHANICALLY SEPARATED—FRESH 4/		W	16.71	643	16.72	649
EXPORT TRADING						
DRUMSTICKS, TOMS	20.00		20.00	80	19.41	1,136
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	23.00	104	23.00	104
TAILS		T	17.00	80	17.50	120
MECHANICALLY SEPARATED 4/	19.00		19.00	400	19.00	460
THIGH MEAT - FROZEN	52.00-58.00		54.00	240	51.73	864

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.