



USDA TURKEY MARKET NEWS REPORT

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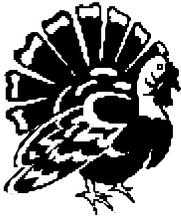
U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET - AT A GLANCE



DOMESTIC MARKET HIGHLIGHTS

The market tone on frozen 8-16 lb. hens and 16-24 lb. toms was steady to barely steady. No trading reported. Demand was limited. Supplies adequate. Parts and meats trading was slow. Offerings generally exceed buyer interest.

EXPORT MARKET HIGHLIGHTS

Trading centered on frozen tom drums and thigh meat, balance light. Demand continues to be slow and selective with most buyers bidding lower price levels. Supplies are adequate.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JUNE 24, 2003**

	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/	58-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	56-61	59	59.00	40	-	-	-	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	58-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	56-58	-	-	-	-	-	-	80	JUN
WESTERN REGION 5/	57-59	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JUNE 25, 2003**

	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/	58-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	56-61	-	-	-	-	-	-	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	58-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	56-58	-	-	-	-	-	-	-	-
WESTERN REGION 5/	57-59	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degree 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.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 24 JUNE 2003.

The undertone on fresh white meat was steady to instances weak, frozen barely steady to weak. Instances of increased confidence was noted in the white meat market due to increased cooked and deli movement being noted and predictions of warmer, drier weather in the East. Offerings available. The undertone on tom drums and full-cut wings was at least steady with most sellers ignoring the lower buyer bids into export channels, balance steady to barely steady. Inquiry slow to moderate. Offerings of tom drums and full-cut wings were light to adequate, balance of tom parts mixed but mostly adequate to fully adequate. Some unsettledness was noted into export channels due to the impending planned ocean freight rate increases. Trading centered on light volumes of tom drums into export channels, balance slow. Plant grade non-basted 10-12 lb. and 14-16 lb. breasts traded at 85 cents delivered domestic and fresh tom drums at 20.50-22 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		F	85.57	280
BREASTS, 4-8 LBS GRADE A—FRESH 2/		F	145.00	20
BREASTS, 4-8 LBS PLANT GRADE 2/	81.00		81.00	120
DRUMSTICKS, TOM		F	23.60	100
DRUMSTICKS, TOM—FRESH		F	23.50	40
DRUMSTICKS, HEN		F	21.00	40
WINGS, FULL-CUT, TOM		F	20.50	80
WINGS, FULL-CUT, HEN		W	20.00	9
WINGS, V-TYPE, TOM				
WINGS, V-TYPE, HEN				
NECKS, TOM	20.00		20.00	80
NECKS, HEN		F	17.00	20
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM—FRESH 3/		F	116.66	496
THIGH MEAT				
THIGH MEAT—FRESH		F	52.00	20
BREAST TRIM MEAT		T	55.00	80
SCAPULA MEAT		F	51.08	74
TENDERLOINS	98.00		98.00	6
DESTRAPPED TENDERS		F	89.50	400
DESTRAPPED TENDERS—FRESH		F	112.93	116
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		F	17.00	80
MECHANICALLY SEPARATED—FRESH 4/		F	15.00	60

EXPORT TRADING

DRUMSTICKS, TOMS	23.00-24.00		23.57	280
WINGS FULL-CUT - TOMS		T	18.00	40
WINGS, V-TYPE, TOM		T	20.00	208
TAILS		R	21.00	40
MECHANICALLY SEPARATED 4/	17.00		17.00	40
THIGH MEAT - FROZEN	51.00		51.00	40

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.

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

	RANGE
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	66
FROZEN TURKEYS Y TOMS 14-24#	63-65
FROZEN TURKEYS Y TOMS 24-28#	65-72

SAN FRANCISCO PROCESSED TURKEY DELIVERED TO RESTAURANTS AND INSTITUTIONS

	RANGE
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 25 JUNE 2003.

Trade sentiment on tom drums and tom full-cut wings was mostly steady to fully steady, tom necks and tom 2-joint wings steady to barely steady. Inquiry was light to fair. Trading was slow for domestic shipments, fair for export. Export activity centered on drums and thigh meat with interest the most active on fresh drums for Mexico and frozen thigh meat for Russia. Some industry members were waiting for clarification of the results of the last Russian plant inspections. Fresh tom drum traded at 23 cents delivered export for July shipment.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		F	85.57	280
BREASTS, 4-8 LBS GRADE A—FRESH 2/		F	145.00	20
BREASTS, 4-8 LBS PLANT GRADE 2/		T	81.00	120
DRUMSTICKS, TOM		F	23.60	100
DRUMSTICKS, TOM—FRESH		F	23.50	40
DRUMSTICKS, HEN		F	21.00	40
WINGS, FULL-CUT, TOM		F	20.50	80
WINGS, FULL-CUT, HEN		W	20.00	9
WINGS, V-TYPE, TOM				
WINGS, V-TYPE, HEN				
NECKS, TOM	18.00		18.00	14
NECKS, HEN		F	17.00	20
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM—FRESH 3/		F	116.66	496
THIGH MEAT				
THIGH MEAT—FRESH		F	52.00	20
BREAST TRIM MEAT				
SCAPULA MEAT		F	51.08	74
TENDERLOINS		T	98.00	6
DESTRAPPED TENDERS		F	89.50	400
DESTRAPPED TENDERS—FRESH		F	112.93	116
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		F	17.00	80
MECHANICALLY SEPARATED—FRESH 4/		F	15.00	60

EXPORT TRADING

DRUMSTICKS, TOMS	20.00-24.00		21.96	408
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		R	21.00	40
MECHANICALLY SEPARATED 4/	18.00		18.00	80
THIGH MEAT - FROZEN	46.50-52.00		48.52	352

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.

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BREEDER TURKEYS CERTIFIED IN CALIFORNIA W/E 06/25/03

SEASON	ACCUMULATED		
	HEAVY WHITE	HEAVY WHITES	ALL BREEDS
JULY 1 TO JUNE 30			
2002-2003	17,455	429,552	429,852
2001-2002	-	400,435	400,735