



USDA TURKEY MARKET NEWS REPORT

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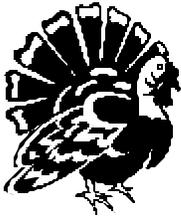
U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET - AT A GLANCE



DOMESTIC MARKET HIGHLIGHTS

The market tone continued unsettled on frozen commodity hens and consumer sized toms with some more willing than others to negotiate in order to move inventories. Demand light to fair with buyers bargain shopping. Trading centered on a heavy volume of frozen commodity 12-16 lb. hens for July-August shipments, balance limited. Offerings adequate to ample with 8-12 lb. frozen commodity hens held with the most confidence. Trading was slow on bulk parts, meat and rib breasts.

EXPORT MARKET HIGHLIGHTS

Trading was light and centered on tom bulk parts at steady to barely steady price levels. Some frozen basted-netted hens and toms traded at 65.50 cents delivered port for October shipment. Inquiry was light to fair, best for Russia.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 15, 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/	55-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	55-61	-	-	-	-	-	-	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	55-61.5	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	55-59	-	-	-	-	-	-	-	-
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) **JULY 16, 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/	55.5-60	55.5	55.50	30	-	-	-	-	-
CENTRAL REGION 4/	53-60	53	53.00	400	53.00	400	AUG	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	55.5-59	55.5	55.50	10	-	-	-	-	-
CENTRAL REGION 4/	55-59	-	-	-	-	-	-	120	JUL
WESTERN REGION 5/	58-59	-	-	-	-	-	-	-	-

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 15 July 2003.

The trade sentiment on tom bulk parts was mostly steady on drums and 2-joint wings, balance steady to barely steady. Demand was moderate on drums, light to fair on 2-joint wings, balance of tom parts slow. Offerings of tom drums and tom 2-joint wings were light to adequate, balance adequate to fully adequate. The undertone on mechanically separated turkey was mostly steady. Domestic trading was slow on all items. Fresh breast trim traded at 63 cents delivered domestic. Export trading centered on a moderate volume of tom 2-joint wings, balance light. Tom necks traded at 16-19 mostly 16 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	88.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	153.00	18
BREASTS, 4-8 LBS PLANT GRADE 2/	79.00		79.00	160
DRUMSTICKS, TOM	25.00-25.50		25.37	54
DRUMSTICKS, TOM—FRESH		F	26.50	80
DRUMSTICKS, HEN		W	24.00	9
WINGS, FULL-CUT, TOM	19.00		19.00	54
WINGS, FULL-CUT, HEN	20.00		20.00	14
WINGS, V-TYPE, TOM		M	25.00	12
WINGS, V-TYPE, HEN		M	54.00	40
NECKS, TOM		M	17.00	120
NECKS, HEN		M	17.00	15
BREASTS, B/S, TOM 3/		R	108.00	40
BREASTS, B/S, TOM—FRESH 3/		M	118.00	25
THIGH MEAT		M	52.00	10
THIGH MEAT—FRESH		F	51.43	140
BREAST TRIM MEAT		W	62.00	134
SCAPULA MEAT	53.00		53.00	40
TENDERLOINS				
DESTRAPPED TENDERS		R	89.00	20
DESTRAPPED TENDERS—FRESH		F	111.29	28
WING MEAT WITH SKIN		W	38.00	20
MECHANICALLY SEPARATED 4/	16.00		16.00	40
MECHANICALLY SEPARATED—FRESH 4/	18.00-21.00		19.50	40
EXPORT TRADING				
DRUMSTICKS, TOMS	22.00		22.00	208
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	20.75-24.50		23.05	520
TAILS		F	21.00	40
MECHANICALLY SEPARATED 4/		F	17.85	1,408
THIGH MEAT - FROZEN	54.00		54.00	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 16 JULY 2003.

The undertone on fresh tom breast meat was steady and the balance of fresh white meat was steady to barely steady. The undertone frozen white meat was barely steady at best. Fresh white meat demand ranged light to moderate with the best interest noted on tom breast meat, frozen slow. Offerings of fresh tom breast meat were uneven with availability dependant upon supplier and delivery time frame, but were mostly adequate. The balance of fresh white offerings were adequate to fully adequate. Frozen white meat offerings were available with some noted at lower trending prices due to age considerations. Trading centered on light volumes of tom bulk parts for export at steady to barely steady price levels.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	88.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/	153.00		153.00	13
BREASTS, 4-8 LBS PLANT GRADE 2/		T	79.00	160
DRUMSTICKS, TOM	22.50-26.00		23.70	200
DRUMSTICKS, TOM—FRESH		F	26.50	80
DRUMSTICKS, HEN		W	24.00	9
WINGS, FULL-CUT, TOM	19.00-21.00		19.80	100
WINGS, FULL-CUT, HEN		T	20.00	14
WINGS, V-TYPE, TOM		M	25.00	12
WINGS, V-TYPE, HEN		M	54.00	40
NECKS, TOM	17.00-18.00		17.67	30
NECKS, HEN		M	17.00	15
BREASTS, B/S, TOM 3/		R	108.00	40
BREASTS, B/S, TOM—FRESH 3/	118.00		118.00	40
THIGH MEAT	51.00		51.00	28
THIGH MEAT—FRESH		F	51.43	140
BREAST TRIM MEAT	56.50		56.50	80
SCAPULA MEAT		T	53.00	40
TENDERLOINS				
DESTRAPPED TENDERS		R	89.00	20
DESTRAPPED TENDERS—FRESH	109.00		109.00	40
WING MEAT WITH SKIN		W	38.00	20
MECHANICALLY SEPARATED 4/		T	16.00	40
MECHANICALLY SEPARATED—FRESH 4/	18.00		18.00	40

EXPORT TRADING

DRUMSTICKS, TOMS	23.00-26.00		24.83	120
WINGS FULL-CUT - TOMS	17.50-18.00		17.57	364
WINGS, V-TYPE, TOM		T	23.05	520
TAILS		F	21.00	40
MECHANICALLY SEPARATED 4/		F	17.85	1,408
THIGH MEAT - FROZEN	51.00-52.50		52.08	144

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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 07/16/03**POULTRY HEALTH BOARD**

SEASON	ACCUMULATED		
	HEAVY WHITE	HEAVY WHITES	ALL BREEDS
JULY 1 TO JUNE 30			
2003-2004	-	-	-
2002-2003	-	-	-