



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 on 8-16 lb. hens and 16-24 lb. toms was steady to fully steady, instances firm. Demand was mixed. Limited sales reported of packer label hens for immediate shipment. Bulk parts and meats trading was light. Inquiry light to moderate. Offerings remain limited and held in firm hands.



EXPORT MARKET HIGHLIGHTS

Trading was mixed. Movement was centered on tom drums and thigh meat, balance limited. Offerings were light. Mechanically separated turkey, thigh meat and tom drums remain steady to firm. Most interest noted from Russia, Mexico and Asia.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **SEPTEMBER 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/	60-63	63	63.00	120	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	760	SEP-OCT
WESTERN REGION 5/	61-62	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	60-62	61	61.00	20	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	560	SEP-OCT
WESTERN REGION 5/	59-60	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **SEPTEMBER 26, 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/	62-64	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-64	-	-	-	-	-	-	-	-
WESTERN REGION 5/	62-65	62	62.00	80	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	60-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

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 SEPTEMBER 26, 2003 CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	62.57	62.00	65.41
CENTRAL REGION	61.20 **	61.99	67.67
WESTERN REGION	63.25	64.57	67.40 **
16-24 LB TOMS			
EASTERN REGION	60.50	61.26	55.81
CENTRAL REGION	62.00	59.50 **	57.55
WESTERN REGION	59.00	62.00	57.00

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#	66-67
FROZEN TURKEYS Y TOMS 14-24#	65-67
FROZEN TURKEYS Y TOMS 24-28#	69-72

SAN FRANCISCO PROCESSED TURKEY DELIVERED TO RESTAURANTS AND INSTITUTIONS

	<u>RANGE</u>
TURKEYS Y HENS	90-109
TURKEYS Y TOMS UNDER 22#	81-99
TURKEYS Y TOMS 22-24#	81-99
TURKEYS Y TOMS 24-26#	79-99
TURKEYS Y TOMS 26 LBS & OVER	94-105

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A, DELIVERED FIRST RECEIVERS, EASTERN REGION CENTS PER POUND, WEEK OF 29-SEP-2003

	(8-16#)	(16-24#)		
	HENS	LBS TOMS	LBS	
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	71.69	320	69.20	100
SALES (PROMOTIONS NOT INCLUDED)	71.69	320	69.20	100
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)		20		20

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

AUGUST	433,041*
SEPTEMBER 1-20, 2003	290,878*
To date 2003	4,187,248*
To date 2002	3,744,855*

* PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS

BY GEOGRAPHICAL AREAS WEEK ENDING 20-Sep-2003 (PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

	<u>YOUNG TURKEYS</u>			<u>TOTAL TURKEYS</u>	
	<u>PCT CHG</u>	<u>AVG LIVE WT</u>	<u>OLD BANDED</u>	<u>AVG LIVE WT</u>	
<u>-THOUSAND HEAD-</u>	<u>PW</u>	<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>	
N EAST	815	-3	21.66	(A)	818 21.66
SATL	694	-24	29.46	(A)	697 29.46
N CENT	2,179	-1	30.25	(A)	2,182 30.25
S CENT	473	-2	19.94	(A)	476 19.94
WEST	514	12	21.73	(A)	516 21.73
U.S. TOTAL	4,675(B)	-5	26.66	14	4,689 26.66
TO-DATE					
2003	175,883(B)			531	176,414
TO-DATE					
2002	175,344(B)			310	175,654

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 81,000; for the year 2,363,000; last year to date 1,983,000.

LIVE TURKEYS SLAUGHTERED

	<u>YOUNG</u>		<u>YOUNG BREEDERS</u>		<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>	<u>BREEDERS</u>		
	<u>THOUSANDS</u>					
HEAD	1,876	2,718	81	14		4,689
AVG WT	15.38	34.52	23.85	29.43		26.66
LAST WEEK	1,980	2,882	37	8		4,907
SAME WK YR AGO	2,002	2,974	73	17		5,066
AVG WT	15.35	34.11	23.78	28.89		26.52
TO-DATE/2003	70,629	102,891	2,363	531		176,414
TO-DATE/2002	70,065	103,296	1,983	310		175,654

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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 SEPTEMBER 2003.

The undertone continued unsettled on fresh tom breast meat with trading noted at mixed values. The undertone on fresh destrapped tenderloins was steady to instances fully steady with trading noted on part load quantities at higher trending price levels. Offerings light. The undertone on the balance of white meat items was fully steady on new production -3 months age, however, offers of older production continued to be noted at discounted prices. Trade sentiment on tom bulk parts was steady to firm. Instances of regional price differences were noted on tom 2-joint wings due to freight considerations. Domestic trading centered on a light volume of fresh tom breast meat, balance slow. For domestic: frozen Grade A non-basted 12-14 lb. WOGs 66, plant grade non-basted 10-14 lb. breasts 92, fresh breast trim 80-86 mostly 80, livers 16 .50 cents delivered pet foods for October - December shipments. Export trading centered on a fair volume of tom drums, balance light. For export: fresh tom drums 44, frozen tom breast meat 128 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	88.00	40
BREASTS, 4-8 LBS GRADE A--FRESH 2/		W	153.00	19
BREASTS, 4-8 LBS PLANT GRADE 2/		W	84.00	640
DRUMSTICKS, TOM		W	41.25	80
DRUMSTICKS, TOM--FRESH		T	41.00	80
DRUMSTICKS, HEN		T	39.00	60
WINGS, FULL-CUT, TOM		W	28.00	15
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM	39.00-45.00		42.50	80
WINGS, V-TYPE, HEN				
NECKS, TOM		W	18.45	55
NECKS, HEN				
BREASTS, B/S, TOM 3/		T	123.00	40
BREASTS, B/S, TOM--FRESH 3/	168.00-175.00		170.18	220
THIGH MEAT				
THIGH MEAT--FRESH	94.00-98.00		95.33	60
BREAST TRIM MEAT	84.00		84.00	10
SCAPULA MEAT		W	72.00	20
TENDERLOINS				
DESTRAPPED TENDERS		T	91.00	20
DESTRAPPED TENDERS--FRESH	124.00-127.00		125.67	45
WING MEAT WITH SKIN		W	53.00	20
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED--FRESH 4/	29.00		29.00	20
EXPORT TRADING				
DRUMSTICKS, TOMS	40.00-42.00		40.94	424
WINGS FULL-CUT - TOMS	29.50-31.00		30.15	92
WINGS, V-TYPE, TOM				
TAILS		W	23.25	120
MECHANICALLY SEPARATED 4/	33.00		33.00	40
THIGH MEAT - FROZEN	93.00		93.00	240

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 SEPTEMBER 2003.

The undertone was steady to barely steady on fresh tom breast meat, at least steady on fresh destrapped tenderloins and fresh white meat trims fully steady. The undertone on frozen white meat was at least steady on tom breast meat and destrapped tenderloins, steady to fully steady on the balance of white meat items. Trade sentiment was steady to firm on toms drums and thigh meat with export interest continuing to be noted at the higher trending market levels. The trade sentiment on tom wings was steady to instances firm, tom necks at least steady and fully steady to firm on mechanically separated turkey. Trading centered on fair volumes of dark meat items for export, balance light. Fresh wing meat traded at 52 cents delivered domestic and frozen tom breast meat 117 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	LST CDE	WTD AVG PRICE	VOLUME (000)	WEEKLY	
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	90.00	1/	90.00	40	89.00	80
BREASTS, 4-8 LBS GRADE A--FRESH 2/		W	153.00	19	153.00	19
BREASTS, 4-8 LBS PLANT GRADE 2/		W	84.00	640	82.64	880
DRUMSTICKS, TOM		W	41.25	80	41.25	80
DRUMSTICKS, TOM--FRESH		T	41.00	80	41.00	80
DRUMSTICKS, HEN		T	39.00	60	39.00	60
WINGS, FULL-CUT, TOM	29.00		29.00	40	28.42	95
WINGS, FULL-CUT, HEN						
WINGS, V-TYPE, TOM		R	42.50	80	42.14	140
WINGS, V-TYPE, HEN	65.00		65.00	40	65.00	40
NECKS, TOM		W	18.45	55	18.45	55
NECKS, HEN						
BREASTS, B/S, TOM 3/		T	123.00	40	123.00	40
BREASTS, B/S, TOM--FRESH 3/	166.00		166.00	80	168.21	728
THIGH MEAT						
THIGH MEAT--FRESH		R	95.33	60	95.33	60
BREAST TRIM MEAT		R	84.00	10	84.00	10
SCAPULA MEAT		W	72.00	20	72.00	20
TENDERLOINS						
DESTRAPPED TENDERS		T	91.00	20	91.00	20
WING MEAT WITH SKIN		W	53.00	20	53.00	20
DESTRAPPED TENDERS--FRESH	120.00		120.00	20	123.92	65
MECHANICALLY SEPARATED 4/	30.00		30.00	40	30.00	40
MECHANICALLY SEPARATED--FRESH 4/	25.00-27.00		26.00	40	24.62	260
EXPORT TRADING						
DRUMSTICKS, TOMS	42.00-45.00		42.86	280	41.59	984
WINGS FULL-CUT - TOMS		R	30.15	92	30.15	92
WINGS, V-TYPE, TOM						
TAILS		W	23.25	120	23.25	120
MECHANICALLY SEPARATED 4/	33.50		33.50	40	29.90	200
THIGH MEAT - FROZEN	93.00		93.00	240	92.78	1,200

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.