



## EGGS

### Production

August table egg production totaled 664 million dozen, up 3 percent from August 2017. On September 1, the number of birds in the table egg flock was 325 million, up 3 percent compared to a year earlier. Egg-type hatching egg production was 87.2 million eggs, up 13 percent from a year earlier. There were 1.11 billion broiler-type hatching eggs produced in August, up 2 percent from last year. The broiler-type laying flock on September 1 was 57.4 million hens, 1 percent above September 2017. Shell eggs broken totaled 212 million dozen during August, up 7 percent from August a year ago and up 4 percent from the 203 million broken in July. Pullets for all egg-types added to flocks in August were up 8 percent year-over-year.

### Price

After the turbulence that characterized the market for most of the year, table egg price changes were modest in September. The price of one dozen Grade A Large eggs in the New York wholesale market began the month at 114 cents/dozen before dropping to 107 cents/dozen in the first week of the month. After remaining at that level for two weeks, prices began to rise modestly, in line with the traditional fall run-up towards the baking season, and closed September where they began, at 114 cents/dozen. Breaking stock prices showed even less volatility. Breaking stock prices began the month at 57 cents/dozen, dropped for a week to 52 cents/dozen, and then returned to 57 cents/dozen for the remainder of the month.

### International Trade

Exports of shell eggs in August totaled 18 million dozen valued at \$35.6 million. This was an increase of 20 percent in volume and 4 percent in value compared with July and an increase of 9 percent in volume and an increase of 16 percent in value compared with August 2017. Through August, 2018 exports were up 6 percent in volume and up 15 percent in value compared with 2017. The U.S. exported \$11.6 million of egg products in August, 15 percent above July but 10 percent below last August. For the first eight months of 2018, the value of egg products exports were 1 percent below the same period in 2017. Mexico, Canada, Hong Kong, Japan, and Brazil were the five largest importers of U.S. eggs and egg products in August.

## TURKEY

### Production

August turkey production totaled 514 million pounds on a ready-to-cook basis. For August, daily production was 3 percent below July and 5 percent below last August. These decreases were driven entirely by reductions in the number of birds slaughtered. Dressed weights were unchanged from last month and year. It is likely these production declines will continue for the next few months. Since the beginning of the year, eggs in incubators have been below year-earlier every month, and poults placed have been below year-earlier levels for every month except July, when poults destined for the fresh holiday markets are placed. Total turkey holdings on August 31 were up 1 percent from August 2017. Total holdings of whole frozen birds were unchanged, but whole toms were up 10 percent while whole hens were down 10 percent compared with last August. Stocks of white meat were down 10 percent year-over-year, while stocks of dark meat were up 43 percent.

### Price

Whole body turkey prices continue to struggle. Whole frozen hen prices were unchanged overall in September, ending the month at 84 cents/lb., while whole frozen toms saw a 1 percent increase to 83 cents/lb. The hen price is 12 cents below the same time last year and 42 cents below the 2014 – 2016 average for the end of September. For turkey producers, the one bright spot may be boneless/skinless (B/S) breast meat prices. B/S breast meat prices rose 13 cents (6 percent) during September to close at 211 cents/lb., its highest level since November 2016. B/S thigh meat rose 1 percent to end the month at 130 cents/lb. Tom drumsticks rose 5 percent to 70 cents/lb., their highest level since January 2015.

### International Trade

U.S. turkey exports in August totaled 22 thousand metric tons valued at \$49.5 million. Exports in August were down 11 percent in volume and 7 percent in value compared with July but up 3 percent in volume and 4 percent in value compared with last August. For the first eight months of the year, exports were up 2 percent in volume and up 7 percent in value compared with 2017. The top five destinations for exports of turkey in August were Mexico, Japan, Canada, the Dominican Republic, and Hong Kong.

## Production

In August, the U.S. produced 3.89 billion pounds of chicken on a ready-to-cook basis. Daily production in August was 2 percent below July but 3 percent above August 2017. The year-over-year increase was primarily driven by an increase in dressed weights, which were up nearly 2 percent. Any production increases in the coming weeks will likely be driven by increases in weights; both eggs in incubators and chicks placed for the four weeks ending September 22 were unchanged from the same period last year.

Total stocks of chicken in cold storage on August 31 were up 6 percent compared with the end of July and up 19 percent compared with August 2017. Inventories of broilers and broiler products were 9 percent above July and 10 percent above last August. Whole broiler supplies were 27 percent above July but 6 percent below last year. Breasts and breast meat stocks were up 3 percent both month-over-month and year-over-year. Dark meat supplies were up 14 percent on the month and 4 percent on the year, with leg quarter holdings up 20 percent from July but down 14 percent from last August. Thighs and thigh meat stocks were up 6 percent month-over-month and up 38 percent year-over-year. Drumstick holdings were up 2 percent compared with July but up 53 percent compared with August 2017. Inventories of wings were up 10 percent on the month and up 54 percent on the year.

## Price

Whole chicken prices climbed modestly in September before giving back all their gains the last week of the month. The National composite price for whole broilers ended the month at 83 cents/lb. Most parts prices declined in September. Boneless/skinless (B/S) breast prices fell 11 percent during the month to close at 95 cents/lb., their lowest level since November 2006. Leg quarter prices fell 2 cents to 28 cents/lb., their lowest level since March 2017. B/S thigh meat prices fell by 3 percent to end the month at 116 cents/lb. Drumsticks fell 5 percent to 40 cents/lb. Wings, on the other hand, rose 8 percent to 153 cents/lb.

## International Trade

The United States exported 283 thousand metric tons of chicken products in August with a value of \$280 million. August's export volume was 8 percent above July but down 1 percent in value and was 7 percent higher in volume than August 2017 and 5 percent higher in value. Through August, 2018 exports were up 3 percent in volume and up 5 percent in value compared with the same period in 2017. In August, our five largest export destinations for chicken were Mexico, Canada, Angola, Hong Kong, and Taiwan.

## Production

In August, 2.43 billion pounds of beef were produced, 1 percent above August 2017 and 9 percent above the July 2018 volume (with 2 more production days). Cattle slaughter totaled about 2.98 million head, up 1 percent from last August and up 8 percent monthly. The average live weight was down 1 pound from last year, at 1,344 pounds. Total beef production for the first eight months of 2018 grew 4 percent from last year. August veal production was up 2 percent from last year, and up 7 percent from July at 6.5 million pounds. 52,300 head of calves were slaughtered in July, a 13 percent increase from 2017 and 9 percent higher monthly. The average live weight was down 23 pounds from last year, at 215 pounds. Year-to-date veal production was 1 percent higher than in 2017.

Total beef in cold storage hit a record high for the month of August, adding 4 percent to supplies in July and 6 percent to 2017 levels. Boneless beef stocks were also record high with increases of 3 percent on a month-over-month basis and 5 percent year-over-year. Frozen beef cut inventories gained 12 percent monthly and 17 percent yearly. The volume of veal in cold storage was down 21 percent from July and down 7 percent from 2017.

## Price

Live cattle prices (FOB, steers and heifers) began September at \$107 per cwt, and mostly remained steady, closing at \$111 per cwt, 2 percent higher than last year. In the first half of the month, the beef cutout value lost the \$7 gained in September, ending the month at \$205 per cwt, 5 percent higher than 2017. The 90 percent lean boneless beef wholesale price continued to steadily fall, dropping \$13 to \$197 per cwt, 11 percent below the year before. The 50 percent lean trim price lost \$24 in value through September hitting a peak of \$92 per cwt but turned down sharply to end with a net loss for the month of \$4 at \$69 per cwt, 1 percent lower than last year. Non packer-owned veal carcass held steady through most of the month as did packer-owned veal carcass prices, ending the month at \$307 and \$305 per cwt, 6 and 7 percent below 2017, respectively. The veal cutout average lost \$8 to \$395 per cwt, 7 percent below last year's value.

## International Trade

Compared to August 2017, beef and veal exports (including variety meats) increased 7 percent to 120 thousand MT, and the export value rose 11 percent to \$752 million. The export volume and value were up 3 and 4 percent, respectively, from July. Cumulative beef exports were higher in volume by 9 percent relative to 2017, and value was 19 percent higher. Japan, South Korea and Mexico were our largest export markets in August. Year-over-year beef import volumes were 5 percent lower at 97 thousand MT, and down slightly in value at \$523 million. Compared to July, beef imports and value were both 7 percent lower. Year-to-date beef and veal imports were slightly lower while import values were up 8 percent from last year. Australia, Canada and Mexico were the largest sources of imported beef to the U.S.

## Production

August pork production totaled 2.32 billion pounds, an increase of 5 percent over last year and 17 percent above July (with 2 additional slaughter days). Total hog slaughter was 11.2 million head, up 5 percent from last year and 16 percent above the month before. The average live weight was steady with last year at 278 pounds. Accumulated pork production for January-August 2018 was 4 percent higher than last year and hit a record high for the month of August.

Frozen pork supplies at the end of August were 6 percent higher than in July, and 1 percent higher than in 2017. Stocks of pork bellies were down 14 percent monthly but were up 82 percent from last year. Picnics in cold storage rose 10 percent monthly and 9 percent yearly. Ham inventories were up 23 percent from July, and up slightly from last year. Rib holdings fell 5 percent from the prior month but gained 5 percent on a yearly basis, while loin supplies rose 16 percent from July but fell 5 percent from 2017. Pork trimmings in cold storage gained 7 percent monthly and 21 percent yearly.

## Price

In September, the negotiated carcass price for barrows and gilts regained nearly all the losses of August, adding \$26 to end at \$63 per cwt, 32 percent above 2017. The pork cutout value regained more than the losses of September, closing the month up \$14 to \$80 per cwt, 10 percent above last year. Trimmed, bone-in hams, 23-27 pounds gained \$11 in the second half of September to \$63 per cwt, 11 percent higher yearly. The picnic meat combos, cushion out price rose \$17 through September, ending at \$74 per cwt, 20 percent below 2017. Pork trim, 72 percent lean gained \$20 to \$62 per cwt, 1 percent below the prior year. Pork belly primals added \$42 to close the month at \$117 per cwt, 28 percent above 2017.

## International Trade

Pork exports in August (including variety meats) were down 1 percent from 2017 at 177 thousand MT, and the value was 6 percent lower at \$460 million. Pork export volume was 3 percent above July and the value was up 6 percent. For 2018 so far, pork exports are up from 2017 by 1 percent in both volume and value. The largest overseas markets for U.S. pork were Japan, Mexico and Canada. Compared to 2017, the August pork import volume fell 17 percent to 37 thousand MT, and value lost 22 percent to \$130 million. The volume of pork imports lost 5 percent relative to July, and the value was down 7 percent. Year-to-date pork import volume and value were down 3 and 6 percent, respectively. The countries of Canada, Poland and Denmark imported the largest volumes of pork to the U.S.

## Production

August production of lamb and mutton was 13.4 million pounds, 4 percent higher than 2017, and up 11 percent from July (the result of 2 extra slaughter days). Sheep slaughter was 204,500 head, up 5 percent from last year and up 14 percent from July. The average live weight was down 1 pound from 2017 at 131 pounds. Total 2018 commercial lamb and mutton production was 5 percent higher than 2017. Lamb and mutton stocks were 6 percent lower monthly but up 23 percent the year before.

## Price

Negotiated live slaughter lamb prices were variable in September, but ended up \$2 to \$136 per cwt, 12 percent less than in 2017. However, the lamb cutout value lost \$8 to \$375, 8 percent below the value a year ago. Leg of lamb, trotter-off values broke the stability seen since March, and lost \$14 to end at \$356 per cwt, 8 percent below 2017. The wholesale price of boneless square-cut lamb shoulders increased \$4 to close the month at \$551 per cwt, 14 percent below last year.

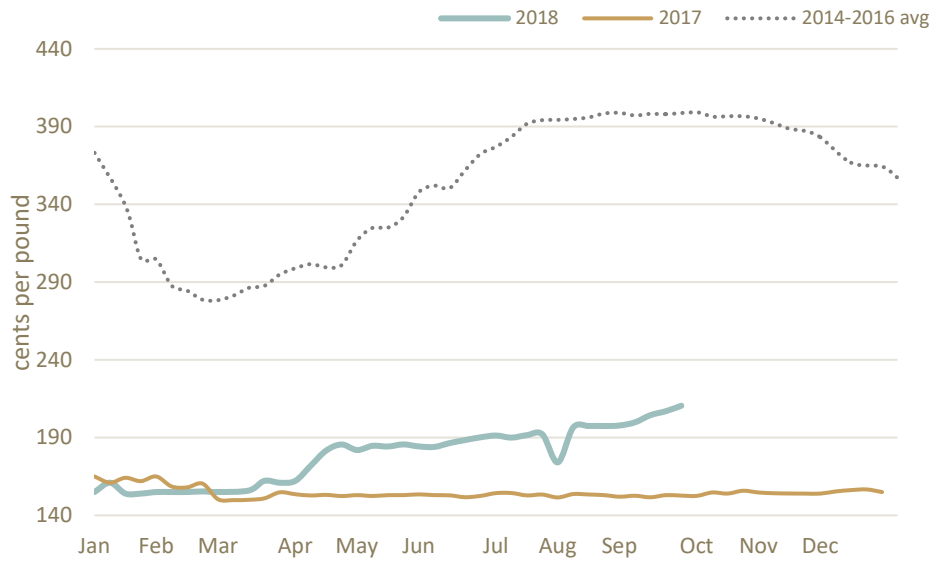
## International Trade

August lamb exports were down 31 percent from 2017 at 143 MT, and down 33 percent in value to \$0.84 million. Compared to July, export volume was down 54 percent and the value was down 38 percent. Year-to-date exports of lamb added 15 percent in volume and 4 percent in value over this period in 2017. Mexico, The Bahamas and United Arab Emirates were the largest export markets for lamb and mutton. U.S. lamb imports in July were up 15 percent from 2017 at 10 thousand MT, and the value lost 2 percent to \$75 million. The August import volume and value were down 21 percent. 2018 total lamb imports were up 11 percent in volume and 16 percent in value from last year. Australia, New Zealand and Chile were the largest sources of imports.

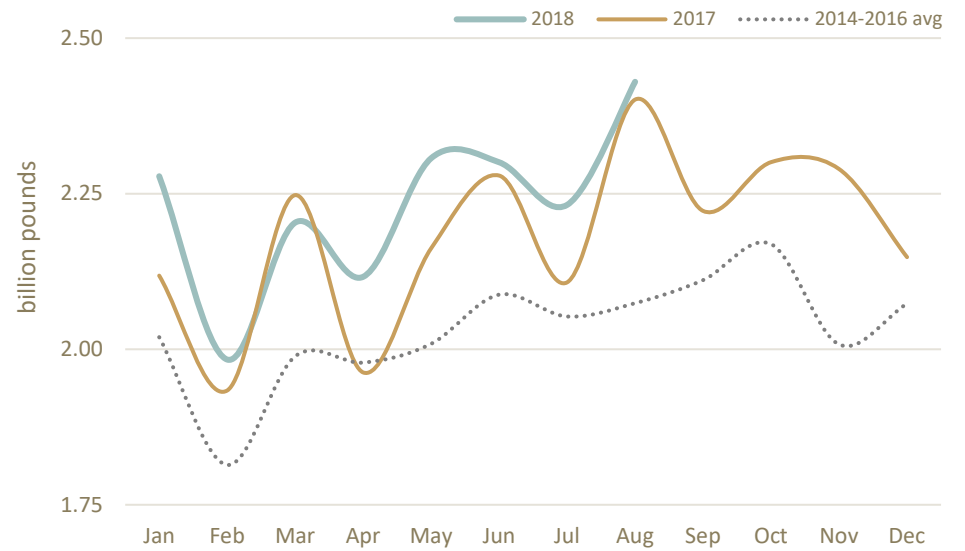
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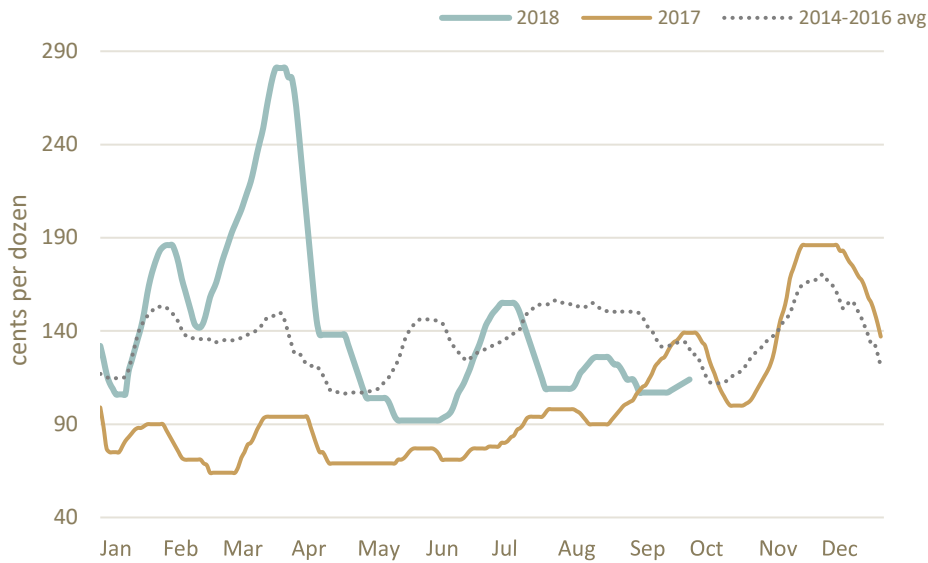
### Fresh Boneless/Skinless Tom Turkey Breast



### Monthly Commercial Beef Production



### New York Shell Egg Price (Grade A Large - wholesale)



### Monthly Commercial Pork Production

