



USDA TURKEY MARKET NEWS REPORT

FRIDAY
NOVEMBER 19, 2004
VOL. 51 NO. 139

ISSN 1522-0575

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 hens was mostly steady to fully steady. However, some spot unsettledness was noted in the East on 12 lb. heavier hens as processors clean up some spot excess inventories. The market tone on frozen commodity 16- 24 lb. toms was steady to instances weak as some processors demonstrate an increasing willingness to negotiate in order to move excess inventories before the holiday demand wanes. Holiday fill-in demand ranged from slow to instances good with the attractiveness of the feature often times playing a role. Offerings of frozen hens were light at best and spotty with 10-12 lb. sizes almost nonexistent. Offerings of frozen packer label 16-24 lb. toms ranged from tight in the West to instances ample in the Midwest and East. Trading was active on fresh white meat, light the balance of parts and meat items.

EXPORT MARKET HIGHLIGHTS

Trading light. Inquiry slow to instances moderate. Processors and exporters continued to note problems in obtaining both trucks and containers with some ports even limiting rail-car arrivals.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) NOVEMBER 18, 2004

	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/	75-83	75	75.00	200	-	-	-	-	-
CENTRAL REGION 4/	77-80	-	-	-	-	-	-	-	-
WESTERN REGION 5/	79-81	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	71-77	73	73.00	440	-	-	-	-	-
CENTRAL REGION 4/	71-76	-	-	-	-	-	-	-	-
WESTERN REGION 5/	74-78	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) NOVEMBER 19, 2004

	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/	75-80	76-78	77.91	464	-	-	-	-	-
CENTRAL REGION 4/	77-79	78	78.00	240	-	-	-	-	-
WESTERN REGION 5/	79-80	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	71-76	73-75	74.64	440	-	-	-	-	-
CENTRAL REGION 4/	71-76	73-75	73.57	280	-	-	-	-	-
WESTERN REGION 5/	72.5-77	72.5	72.50	400	-	-	-	-	-

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 19, 2004	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	77.25	77.50	69.20 **
CENTRAL REGION	78.74	78.50 **	68.00
WESTERN REGION	80.87	79.00 **	71.00
16-24 LB TOMS			
EASTERN REGION	73.76	76.50	64.40 **
CENTRAL REGION	74.45	76.00 **	63.20 **
WESTERN REGION	76.58	77.00 **	66.00

**BASED ON OFFERS

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

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	112
FRESH TURKEYS Y TOMS 14-24#	112
FROZEN TURKEYS Y HENS 8-16#	
FROZEN TURKEYS Y TOMS 14-24#	85
FROZEN TURKEYS Y TOMS 24-28#	85

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

	<u>RANGE</u>
TURKEYS Y HENS	105-123
TURKEYS Y TOMS UNDER 22#	99-123
TURKEYS Y TOMS 22-24#	99-116
TURKEYS Y TOMS 24-26#	98-120
TURKEYS Y TOMS 26 LBS & OVER	98-122

NATIONAL FRESH TURKEYS -

U.S. GRADE A, DELIVERED TO FIRST RECEIVERS
(prices reflect turkeys with timers) Week of 22-NOV-2004

Price (cents/lb.) Volume (lbs.)

PRICED AT TIME OF SALE

8-16 lbs.	91.96	2,740,000
16-24 lbs.	90.69	2,600,000

PRICE TO BE DETERMINED

8-16 lbs.	--	120,000
16-24 lbs.	--	60,000

Total Volume: 5,520,000

NOTE: For continuity during the report transition to a national basis,
Eastern Region data will be shown separately until December 2.

FRESH TURKEYS WITH TIMERS OR EQUIVALENT

U.S. GRADE A DELIVERED FIRST RECEIVERS, EASTERN REGION,
CENTS PER POUND, WEEK OF 22-NOV-2004

	<u>HENS (8-16#)</u>	<u>TOMS (16-24#)</u>		
	<u>PRICE (000)</u>	<u>PRICE (000)</u>		
SALES (Promotions Included)	91.98 2740	90.69 2600		
SALES (Promotions not Included)	91.98 2740	90.69 2600		
SALES (Promotions Only)				
SALES (Price to be Determined)	120	60		

TURKEYS SLAUGHTERED IN FEDERALLY INSPECTED PLANTS

W/E 13-Nov-2004 BY GEOGRAPHICAL AREAS (PRELIMINARY)

	<u>YOUNG TURKEYS</u>			<u>TOTAL TURKEYS</u>	
	<u>PCT</u>	<u>AVG</u>	<u>OLD</u>	<u>AVG</u>	
	<u>CHG</u>	<u>LIVE</u>	<u>BANDED</u>	<u>LIVE</u>	
<u>-THOUSAND HEAD-</u>	<u>PW</u>	<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>	
North East	766	-10	21.39	(A)	767 21.39
South Atlantic	793	3	29.48	(A)	794 29.48
North Central	2,355	6	31.13	(A)	2,355 31.13
South Central	691	4	18.62	(A)	691 18.62
West	731	6	21.67	(A)	731 21.67
U.S. total	5,336(B)	2	26.57	2	5,338 26.57
To-date					
2004	197,667(B)			313	197,980
To-date					
2003	214,195(B)			589	214,784

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week
48,000; for the current year to date 2,364,000; for last year to date
2,916,000.

TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)

Slaughter-certified ready-to-cook turkeys

October	429,228*
November 1-13, 2004	225,742*

To date 2004	4,435,033*
To date 2003	4,761,281*

*Preliminary

LIVE TURKEYS SLAUGHTERED UNDER FEDERAL INSPECTION

W/E 13-Nov-2004

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		
	<u>Thousands</u>				
Head	2,403	2,885	48	2	5,338
Avg Wt	16.08	35.36	23.29	30.10	26.57
Last week	2,332	2,834	46	1	5,213
Same wk yr ago	2,541	3,250	74	23	5,888
Avg Wt	15.57	33.65	25.09	27.33	25.72
To-date/2004	79,258	116,045	2,364	313	197,980
To-date/2003	86,314	124,965	2,916	589	214,784

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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 18 NOVEMBER 2004.

The market tone on fresh tom breast meat and fresh destrapped tenderloins was mostly steady. Some isolated unsettledness was noted in the market due to the upcoming holiday weekend. Demand slow to moderate. Most processors were running reduced schedules next week for the Thanksgiving holiday. The market tone on the balance of fresh white meat was steady to fully steady. Demand slow to moderate for the light at best, but spotty offerings. The mechanically separated turkey market tone was steady to instances barely steady. Inquiry slow to moderate. Offerings mixed ranging from tight to instances fully adequate. Trading slow to sometimes moderate with activity centered on fresh tom breast meat.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	100.00	200
BREASTS, 4-8 LBS GRADE A--FRESH 2/		T	159.12	306
BREASTS, 4-8 LBS PLANT GRADE 2/				
DRUMSTICKS, TOM	37.00		37.00	120
DRUMSTICKS, TOM--FRESH	39.00		39.00	40
DRUMSTICKS, HEN		F	40.00	40
WINGS, FULL-CUT, TOM		W	52.00	40
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM		T	55.00	80
WINGS, V-TYPE, HEN		W	103.00	40
NECKS, TOM	28.00		28.00	120
NECKS, HEN				
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM--FRESH 3/	214.00-216.00		215.00	240
THIGH MEAT				
THIGH MEAT--FRESH				
BREAST TRIM MEAT	138.00		138.00	17
SCAPULA MEAT		M	113.00	12
TENDERLOINS				
DESTRAPPED TENDERS	177.00		177.00	12
DESTRAPPED TENDERS--FRESH		M	191.00	80
WING MEAT WITH SKIN	100.00		100.00	32
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED--FRESH 4/		W	18.82	110
EXPORT TRADING				
DRUMSTICKS, TOMS	38.00		38.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		W	24.00	80
MECHANICALLY SEPARATED 4/		T	21.00	20
THIGH MEAT - FROZEN	81.00		81.00	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.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 19 NOVEMBER 2004.

The market tone on tom drums and tom full-cut wings was steady to barely steady, tom necks steady at best and tom 2-joint wings mostly steady. Buyer caution was noted on tom 2-joint wings with some watching for further market developments in December. Offerings of tom 2-joint wings light, but spotty. Offerings on the balance of tom bulk parts ranged from at least adequate on necks to sometimes fully adequate on drums and full-cut wings. Bulk parts supplies were least available from whole turkey processors. The market tone on hen bulk parts ranged from firm on 2-joint wings to barely steady on necks. Demand slow to instances good, best on hen 2-joint wings. Offerings of hen 2-joint wings short of buyers needs, hen drums light to adequate and hen necks fully adequate. Trading was heavy on fresh white meat for domestic shipments, balance slow. Increased trading was noted on fresh destrapped tenderloins at both lower trending prices for current shipments and spot premiums noted for early December. For domestic (fresh): scapula 118-122, breast trim 138 cents delivered. For export: fresh thigh meat 88-90, freezer destrapped tenderloins 180 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/ T	WTD AVG PRICE	VOLUME (000)	WEEKLY	WEEKLY
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	100.00	200	100.00	200
BREASTS, 4-8 LBS GRADE A--FRESH 2/	165.00		165.00	39	159.78	345
BREASTS, 4-8 LBS PLANT GRADE 2/						
DRUMSTICKS, TOM	38.00		38.00	160	37.80	300
DRUMSTICKS, TOM--FRESH		R	39.00	40	39.00	40
DRUMSTICKS, HEN		F	40.00	40		
WINGS, FULL-CUT, TOM	53.00		53.00	80	51.90	400
WINGS, FULL-CUT, HEN						
WINGS, V-TYPE, TOM		T	55.00	80	55.00	80
WINGS, V-TYPE, HEN		W	103.00	40	101.20	100
NECKS, TOM	28.00		28.00	220	28.10	400
NECKS, HEN						
BREASTS, B/S, TOM 3/	181.00		181.00	40	181.00	40
BREASTS, B/S, TOM--FRESH 3/	213.00-216.00		214.00	413	214.55	1093
THIGH MEAT						
THIGH MEAT--FRESH						
BREAST TRIM MEAT		R	138.00	17	137.63	27
SCAPULA MEAT		M	113.00	12	113.00	12
TENDERLOINS						
DESTRAPPED TENDERS		R	177.00	12	177.00	12
WING MEAT WITH SKIN		R	100.00	32	100.00	32
DESTRAPPED TENDERS--FRESH	191.00-195.00		191.87	298	191.68	378
MECHANICALLY SEPARATED 4/	21.00		21.00	40	21.00	40
MECHANICALLY SEPARATED--FRESH 4/	18.00-20.00		19.00	120	19.19	310
EXPORT TRADING						
DRUMSTICKS, TOMS	39.00		39.00	40	38.17	240
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		W	24.00	80	24.00	80
MECHANICALLY SEPARATED 4/	21.00		21.00	160	21.92	260
THIGH MEAT - FROZEN	82.00		82.00	52	81.30	980

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.