

TURKEY MARKET NEWS REPORT

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U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News & Analysis Branch

NATIONAL TURKEY MARKET AT-A-GLANCE



The market tone on 8-16 lb. hens and 16-24 lb. toms was steady to fully steady. Demand was light to moderate with most interest on deferred arrivals. Trading was light to moderate on frozen whole birds for fill-in basis. Fresh trading was light to moderate and best for the November holiday. Offerings of whole turkeys both fresh and frozen was mixed, ranging from light to adequate. Tom bulk parts was steady to fully steady, instances firm for full cut wings. Demand was light to moderate. Offerings were short to barely adequate. White meat trade sentiment was fully steady, instances firm. Trading was slow to

EXPORT MARKET HIGHLIGHTS

moderate. Offerings light to adequate.

DOMESTIC MARKET HIGHLIGHTS

Trading was slow to moderate. Demand was light to moderate with buyers cautious and selective. Offerings were short to adequate.

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

| for October 01, 2009 | | CURRENT | SHIPMEN | TS 2/ | FORW | ARD SHIPMI | ENTS 6/ | OPEN COMMITMENTS 7/ VOLUME DEL | | |
|--------------------------|--------|---------|------------|-----------------|------------|-----------------|------------|-----------------------------------|-----|--|
| 101 0010001 01, 2000 | OFFERS | | WTD AVG | VOLUME (000) | WTD AVG | VOLUME (000) | DEL PER | (000) | PER | |
| 8-16 LB HENS | | | | | | | | - | - | |
| EASTERN REGION 3/ | 78-82 | 81-81.5 | 81.17 | 120 | - | - | - | - | - | |
| CENTRAL REGION 4/ | 78-84 | 84 | 84.00 | 140 | - | - | - | - | - | |
| WESTERN REGION 5/ | 78-85 | 85 | 85.00 | 40 | - | - | - | | | |
| 16-24 LB TOMS | | | | | | | | - | - | |
| EASTERN REGION | 78-82 | 81.5 | 81.50 | 40 | - | - | - | | | |
| CENTRAL REGION | 78-82 | - | - | - | - | - | - | - | - | |
| WESTERN REGION | 78-85 | 85 | 85.00 | 40 | - | - | - | - | - | |

| | | | | | | | | OPEN COMMITMENTS | | | |
|----------------------|--------|---------|----------|--------|------|-------------|---------|------------------|-----|--|--|
| for October 02, 2009 | (| CURRENT | SHIPMEN' | TS 2/ | FORW | /ARD SHIPMI | ENTS 6/ | VOLUME | DEL | | |
| | OFFERS | SALES | WTD | VOLUME | WTD | VOLUME | DEL | (000) | PER | | |
| | | | AVG | (000) | AVG | (000) | PER | | | | |
| 8-16 LB HENS | | | | | | | | _ | - | | |
| EASTERN REGION 3/ | 80-83 | 81-83 | 82.00 | 120 | - | - | - | _ | - | | |
| CENTRAL REGION 4/ | 80-84 | 83 | 83.00 | 40 | - | - | - | _ | - | | |
| WESTERN REGION 5/ | 80-85 | - | - | - | - | - | - | | | | |
| | | | | | | | | | | | |
| 16-24 LB TOMS | | | | | | | | - | - | | |
| EASTERN REGION | 80-83 | 81-83 | 82.00 | 120 | - | - | - | - | - | | |
| CENTRAL REGION | 80-82 | - | - | - | - | - | - | - | - | | |
| WESTERN REGION | 80-85 | - | - | - | _ | _ | - | | | | |

^{1/} May include product stored at temperatures in range of 1 to 25 degrees F.

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 ENDING OCT 02, 2009 8-16 LB HENS | CURRENT WEEK | LAST WEEK | SAME WEEK YEAR AGO | MONTH OF SEPTEMBER 8-16 LB HENS | CURRENT MONTH | LAST MONTH | SAME MONTH YEAR AGO |
|---|-----------------|--------------|-----------------------|---------------------------------------|------------------|---------------|------------------------|
| EASTERN REGION | 81.58 | 79.01 | 100.00** | EASTERN REGION | 80.26 | 81.33 | 99.86 |
| CENTRAL REGION | 83.58 | 81.00 | 100.00 | CENTRAL REGION | 80.00 | 81.14 | 99.24 |
| WESTERN REGION | 85.00 | 83.18 | 100.50** | WESTERN REGION | 80.50 | 81.14 | 100.10 |
| 16-24 LB TOMS | | | | 16-24 LB TOMS | | | |
| EASTERN REGION | 81.88 | 74.12 | 99.50** | EASTERN REGION | 80.11 | 81.05 | 99.62 |
| CENTRAL REGION | 80.20** | 81.33 | 100.00 | CENTRAL REGION | 80.21 | 80.89 | 99.50 |
| WESTERN REGION | 85.00 | 80.00 ** | 100.50** | WESTERN REGION | 80.21 | 81.14 | 100.10 |
| **BASED ON OFFERS | 3 | | | | | | |

^{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.

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

| | <u>RANGE</u> |
|------------------------------|--------------|
| TURKEYS Y HENS | 113-149 |
| TURKEYS Y TOMS UNDER 22# | 109-149 |
| TURKEYS Y TOMS 22-24# | 109-149 |
| TURKEYS Y TOMS 24-26# | 107-149 |
| TURKEYS Y TOMS 26 LBS & OVER | 120-149 |

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

| | RANGE |
|------------------------------|---------|
| FRESH TURKEYS Y HENS 8-16# | 110-120 |
| FRESH TURKEYS Y TOMS 14-24# | |
| FROZEN TURKEYS Y HENS 8-16# | 81-91 |
| FROZEN TURKEYS Y TOMS 14-24# | 81-91 |
| FROZEN TURKEYS Y TOMS 24-28# | 81-92 |

NATIONAL FRESH TURKEYS

U.S. GRADE A, DELIVERED TO FIRST RECEIVERS (prices reflect turkeys with timers), Week of 05-OCT-2009

| | Price (cents/lb.) | Volume (lbs.) |
|--------------------------------------|---------------------------------|-------------------|
| PRICED AT 8-16 lbs. 16-24 lbs. | TIME OF SALE 101.27 99.82 | 223,200 85,000 |
| | BE DETERMINED | 00,000 |
| 8-16 lbs. 16-24 lbs. | | 5,000 5,000 |

Total Volume: 318,200

TURKEYS SLAUGHTERED IN FEDERALLY INSPECTED PLANTS

W/E 26-SEP-2009 (Preliminary)

| W/L 20-3LF-2009 (Fleiililliary) | | | | | | | |
|---------------------------------|-------------|----------|--------|------------|------------|--------|---------|
| | Old | Total to | ırkeys | | | | |
| | | Pct C | hg | Avg | Banded | | Avg |
| -Thousan | d Head- | Prev | wk | Live wt | Thousand | head | Live wt |
| North East | 664 | | -6 | 26.48 | (A) | 670 | 26.48 |
| South Atlantic | 775 | | 11 | 33.69 | (A) | 780 | 33.69 |
| North Central | 2,178 | | -3 | 31.96 | (A) | 2,183 | 31.96 |
| South Central | 692 | | -7 | 19.70 | (A) | 697 | 19.70 |
| West | 352 | | 11 | 26.65 | (A) | 357 | 26.65 |
| U.S. total | 4,661 | (B) | -1 | 29.22 | 26 | 4,687 | 29.22 |
| To-date | | | | | | | |
| 2009* | 172,563 | (B) | | | 243 1 | 72,806 | |
| To-date | | ` , | | | | | |
| 2008* | 181,739 | (B) | | | 376 1 | 82,115 | |
| (A) Not published | hiove at he | diéclo | eina | leubivibai | operations | | |

⁽A) Not published to avoid disclosing individual operations.

Young

LIVE TURKEYS SLAUGHTERED UNDER FEDERAL INSPECTION

Young

Young

19.721

Old

8,561 4,115,594

Total

W/E 26-SEP-2009 (Preliminary)

| | Hens | Toms | Toms Breeders | | Turkeys |
|----------------|------------|-------------|---------------|-------|-----------|
| | | Thoι | ısands | | |
| Head | 1,716 | 2,902 | 43 | 26 | 4,687 |
| Avg Wt | 17.13 | 36.44 | 27.37 | 25.26 | 29.22 |
| Last week | 1,901 | 2,773 | 42 | 15 | 4,731 |
| Same wk yr ago | 2,114 | 2,873 | 37 | 9 | 5,033 |
| Avg Wt | 17.25 | 38.07 | 25.14 | 31.23 | 29.22 |
| To-date/2009* | 72,851 | 98,779 | 933 | 243 | 172,806 |
| To-date/2008* | 76,268 | 104,425 | 1,046 | 376 | 182,115 |
| Ready-to-Cook | Weight and | Dressing Pe | ercentage | | |
| • | Ū | • | J | | |
| Current week | 23,522 | 84,591 | 900 | 502 | 109,515 |
| Last week | 25,676 | 81,824 | 815 | 329 | 108,644 |
| Same wk yr ago | 29,173 | 87,500 | 712 | 215 | 117,600 |
| To-date/2009* | 956.468 | 2.914.821 | 18.870 | 5.614 | 3.895.773 |
| 10-uate/2009 | 950,400 | 2,314,021 | 10,070 | 5,614 | 3,083,773 |

3.120.368

USDA, AMS, POULTRY PROGRAMS, MARKET NEWS AND ANALYSIS BRANCH OFFICES

To-date/2008*

| Washington, DC | Voice Fax | (202)720-6911 (202)720-2403 | Michael Sheats, Chief |
|----------------|--------------------------|---|---|
| Atlanta, GA | Voice Fax | (404)562-5850 (404)562-5875 | Annie Terry, Officer-in-Charge |
| Jackson, MS | Voice Fax | (601)965-4662 (601)359-1175 | Gary Brown, Southern States Area Supervisor |
| Des Moines, IA | Voice Fax Recorded | (515)284-4471 (515)284-4468 (515)284-4545 | Mary L. Adkins, Officer-in-Charge |

⁽B) Number of young banded breeder turks included: this week 43,000; for the current year to date* 933,000; for last year to date* 1,046,000.

^{*}Note: Year to-date totals reflect comparable time periods.

^{966.944} (A) Dressing % adjustments reflect quarterly update.

^{*}Note: Year to-date totals reflect comparable time periods.

NATIONAL YOUNG TURKEY PARTS, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 01 OCT 2009.

The market tone on tom full-cut wings was steady to firm, balance of tom bulk parts steady to fully steady. Demand ranged from light to good. Offerings were short to adequate with full-cut wings in the tightest position. White meat trade sentiment was steady to fully steady. Demand on white meat was light to moderate while offerings were adequate. The market tone on thigh meat was fully steady to firm. Demand was moderate to good for domestic and export. Offerings were short. The trade sentiment on mechanically separated turkey was steady to barely steady. Demand was mostly light with offerings adequate to fully adequate. Domestic: fresh scapula meat 122.5, frozen ground breast trim 125.75 cents delivered.

| DOMESTIC TRADING | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|---|--------------------------|-------------------|------------------|-----------------|
| BREASTS, 4-8 LBS GRADE A 2/ BREASTS, 4-8 LBS GRADE AFRESH 2/ | 179.00 | | 179.00 | 4 |
| BREASTS, 4-8 LBS PLANT GRADE 2/ | = 4 00 = = 00 | | 50.00 | |
| DRUMSTICKS, TOM DRUMSTICKS, TOMFRESH | 54.00-57.00 | W | 56.00 53.00 | 60 80 |
| DRUMSTICKS, HEN | | VV | 55.00 | 80 |
| WINGS, FULL-CUT, TOM | 70.00-74.00 | | 71.33 | 60 |
| WINGS, FULL-CUT, HEN | == 00 | | 00 | |
| WINGS, V-TYPE, TOM WINGS, V-TYPE, HEN | 77.00 | | 77.00 | 80 |
| NECKS, TOM | | W | 39.66 | 178 |
| NECKS, HEN | | F | 38.00 | 5 |
| BREASTS, B/S, TOM 3/ | | F | 135.00 | 20 |
| BREASTS, B/S, TOMFRESH 3/ THIGH MEAT | 166.00 | W | 166.00 99.50 | 40 |
| THIGH MEAT | 102.00 | VV | 102.00 | 160 40 |
| BREAST TRIM MEAT | 102.00 | W | 122.00 | 40 |
| SCAPULA MEAT | 114.50-115.75 | | 114.88 | 26 |
| WING MEAT WITH SKIN | 103.50 | _ | 103.50 | 18 |
| TENDERLOINS DESTRAPPED TENDERS | | F | 125.00 | 10 |
| DESTRAPPED TENDERSFRESH | 140.00-142.50 | | 141.00 | 50 |
| MECHANICALLY SEPARATED 4/ | | F | 19.00 | 40 |
| MECHANICALLY SEPARATEDFRESH 4/ | 25.00-27.00 | | 26.25 | 48 |
| EXPORT TRADING | | | | |
| DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS | | W | 55.00 | 162 |
| WINGS, V-TYPE, TOM | | F | 73.31 | 804 |
| TAILS | | W | 27.00 | 36 |
| MECHANICALLY SEPARATED 4/ | | W W | 23.00 | 108 |
| THIGH MEAT - FROZEN | | VV | 100.80 | 100 |

^{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, INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 02 OCT 2009.

The market tone on bulk parts was steady to fully steady, instances firm on tom full-cut wings. Demand was light to good with offerings were short to adequate, full-cut wings in the tightest position. White meat trade sentiment was steady to at times firm. White meat demand was light to moderate. Offerings were adequate. The market tone on thigh meat ranged steady to firm. Demand was moderate to good while offerings were short of needs. The trade sentiment on mechanically separated turkey was steady to barely steady. Demand was light to moderate. Offerings were adequate to fully adequate. Domestic: frozen Grade A non-basted breasts 12-14 lbs. 115, 14-16 lbs. 120, plant grade basted breasts 14-16 lbs. 110, 18-20 lbs. 125, fresh breast trim 130, frozen tails 28 cents delivered. Export: frozen tom breast meat over 6 mo. age 142, frozen tom breast meat under 3 mo. 138 to 160 cents delivered port.

| DOMESTIC TRADING | PRICE RANGE | LST CODE 1/ | WTD AVG PRICE | VOLUME (000) | WEEKLY WTD AVG PRICE | WEEKLY VOLUME (000) |
|---|----------------|-------------------|---------------------|-----------------|-------------------------------|---------------------------|
| BREASTS, 4-8 LBS GRADE A 2/ | 104.00 | | 104.00 | 80 | 104.00 | 80 |
| BREASTS, 4-8 LBS GRADE AFRESH 2/ BREASTS, 4-8 LBS PLANT GRADE 2/ | | R | 179.00 | 4 | 171.29 | 7 |
| DRUMSTICKS, TOM | 55.00-57.00 | | 56.13 | 160 | 55.95 | 236 |
| DRUMSTICKS, TOMFRESH | 51.50-53.00 | | 51.88 | 160 | 52.25 | 240 |
| DRUMSTICKS, HEN | 52.00 | | 52.00 | 12 | 52.00 | 12 |
| WINGS, FULL-CUT, TOM | 69.00-72.00 | | 71.45 | 220 | 70.88 | 448 |
| WINGS, FULL-CUT, HEN | 66.00 | | 66.00 | 15 | 66.00 | 15 |
| WINGS, V-TYPE, TOM | 82.00 | | 82.00 | 40 | 78.67 | 120 |
| WINGS, V-TYPE, HEN | | | | | | |
| NECKS, TOM | 39.50-41.00 | | 40.79 | 140 | 40.16 | 318 |
| NECKS, HEN | | F | 38.00 | 5 | | |
| BREASTS, B/S, TOM 3/ | | F | 135.00 | 20 | | |
| BREASTS, B/S, TOMFRESH 3/ | 166.00-171.00 | | 169.46 | 260 | 169.00 | 300 |
| THIGH MEAT | 94.00-95.00 | | 94.94 | 43 | 98.54 | 203 |
| THIGH MEATFRESH | 94.00-96.00 | | 94.70 | 400 | 95.36 | 440 |
| BREAST TRIM MEAT | | W | 122.00 | 40 | 122.00 | 40 |
| SCAPULA MEAT | | R | 114.88 | 26 | 114.35 | 66 |
| WING MEAT WITH SKIN | 107.00-109.00 | | 108.00 | 80 | 107.17 | 98 |
| TENDERLOINS | 127.00 | | 127.00 | 15 | 127.00 | 15 |
| DESTRAPPED TENDERS | 135.00 | | 135.00 | 3 | 135.00 | 3 |
| DESTRAPPED TENDERSFRESH | 140.00-141.00 | | 140.78 | 80 | 140.19 | 170 |
| MECHANICALLY SEPARATED 4/ | 19.00-23.00 | | 21.00 | 80 | 21.00 | 80 |
| MECHANICALLY SEPARATEDFRESH 4/ | 24.00-26.00 | | 24.89 | 180 | 25.18 | 228 |
| EXPORT TRADING | | | | | | |
| DRUMSTICKS, TOMS | 55.00 | | 55.00 | 162 | 55.00 | 324 |
| WINGS FULL-CUT - TOMS | 71.00 | | 71.00 | 162 | 71.00 | 162 |
| WINGS, V-TYPE, TOM | | F | 73.31 | 804 | | |
| TAILS | 28.00-34.00 | | 30.33 | 120 | 29.56 | 156 |
| MECHANICALLY SEPARATED 4/ | | W | 23.00 | 108 | 23.00 | 108 |
| THIGH MEAT - FROZEN | 96.00 | | 96.00 | 54 | 99.12 | 154 |

^{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.