



# TURKEY MARKET NEWS REPORT

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## National Turkey Market At-A-Glance

### Domestic Market Highlights

The market on frozen 8-16 lb. hens and 16-24 lb. toms is steady. Frozen demand light to moderate. Fresh demand for November moderate. Frozen offerings very light to moderate, mostly very light to light with consumer sized toms the most available. November fresh offerings light to moderate. Frozen basted equivalent offering prices on a national basis for hens 108.00-116.00 cents shipping point and 16-24 lb. toms 108.00-113.00 cents shipping point for current deliveries. Trading light on frozen basted equivalent hens at 116.50 cent shipping point and consumer sized toms at 112- 112.50 cents shipping point.



The market on white meat is mostly steady. The undertone on frozen breast trim is steady to weak, frozen tom breast meat and destrapped tenderloins steady to firm, balance of white meat steady. Demand light to moderate. Offerings of frozen breast trim are moderate to heavy with the balance of white meat very light to instances moderate. The market on consumer sized rib breasts is steady to firm and steady on institutional sizes. Demand light to moderate. Offerings of 4-8 lb. breasts are very light to light and institutional sizes light. The active export demand continues to strongly influence the domestic parts and thigh meat markets. The market on hen and tom bulk parts is steady to firm. Demand moderate to good. Offerings very light to light. The market on thigh meat is steady to firm. Demand moderate to good, mostly moderate. Offerings very light to light. The market on fresh mechanically separated turkey is steady at best and frozen steady. Demand and offerings light to moderate with frozen tightest. Trading light to moderate.

### Export Market Highlights

Trading light to moderate with activity also reported on fresh thigh meat, fresh tom drums and fries. The market is steady to firm. Demand moderate to good. Offerings very light to light.

## California Processed Turkey – cents per pound

### San Francisco - delivered to restaurants & institutions

|                               | Range   |
|-------------------------------|---------|
| Turkeys Y Hens                | 147-169 |
| Turkeys Y Toms under 22#      | 144-169 |
| Turkeys Y Toms 22-24#         | 144-169 |
| Turkeys Y Toms 24-26#         | 146-169 |
| Turkeys Y Toms 26 lbs. & Over | 148-169 |

### Southern (Los Angeles area) - delivered to retailers

|                              | Range   |
|------------------------------|---------|
| Fresh Turkeys Y Hens 8-16#   | 118-128 |
| Fresh Turkeys Y Toms 14-24#  |         |
| Frozen Turkeys Y Hens 8-16#  | 109-114 |
| Frozen Turkeys Y Toms 14-24# | 111-120 |
| Frozen Turkeys Y Toms 24-28# | 115-125 |

## Live Turkeys Slaughtered Under Federal Inspection

Week ending 01-Oct-2011 (Preliminary)

|   | Young               |           | Breeder |       | Total     |
|---|---------------------|-----------|---------|-------|-----------|
|   | Hens                | Toms      | Young   | Old   |           |
|   | -----Thousands----- |           |         |       |           |
| Head  | 1,969               | 2,678     | 11      | 9     | 4,667     |
| Avg Wt  | 17.07               | 38.13     | 26.89   | 24.93 | 29.19     |
| Last week   | 1,775               | 2,565     | 30      | 2     | 4,372     |
| Same wk yr ago                                      | 1,734               | 2,740     | 30      | 13    | 4,517     |
| Avg Wt  | 16.97               | 36.60     | 28.66   | 32.72 | 29.23     |
| To-date/2011*                                       | 70,622              | 100,249   | 812     | 268   | 171,951   |
| To-date/2010*                                       | 69,782              | 99,669    | 825     | 283   | 170,559   |
| % Change YTD  | 1%                  | 1%        | -2%     | -5%   | 1%        |
| <i>Ready-to-Cook Weight and Dressing Percentage</i> |                     |           |         |       |           |
| Current week  | 26,889              | 81,680    | 228     | 173   | 108,970   |
| Last week   | 25,259              | 78,131    | 578     | 51    | 104,019   |
| Same wk yr ago                                      | 23,541              | 80,227    | 662     | 328   | 104,758   |
| To-date/2011*                                       | 961,165             | 3,105,093 | 16,252  | 6,389 | 4,088,899 |
| To-date/2010*                                       | 943,977             | 3,042,936 | 16,321  | 7,230 | 4,010,464 |
| % Change YTD  | 2%                  | 2%        | 0%      | -12%  | 2%        |
| Dressing %  | 80.0%               | 80.0%     | 77.0%   | 77.0% |           |

(A) Dressing % adjustments reflect quarterly update.

\*Note: Year to-date totals reflect comparable time periods.

## Turkeys Slaughtered In Federally Inspected Plants

Week ending 01-Oct -2011 (Preliminary)

|                | -----Young Turkeys----- |    |         | Old               | Total Turkeys |     |
|----------------|-------------------------|----|---------|-------------------|---------------|-----|
|                | Thousand                | %  | Avg     |                   | Breeders      | Avg |
|                | Head                    | PW | Live wt | --Thousand head-- | Live wt       |     |
| North East     | 621                     | 2  | 26.37   | (A)               | 623 26.37     |     |
| South Atlantic | 737                     | 10 | 34.44   | (A)               | 739 34.44     |     |
| North Central  | 2,342                   | 8  | 31.45   | (A)               | 2,344 31.45   |     |
| South Central  | 726                     | 7  | 18.85   | (A)               | 728 18.85     |     |
| West           | 232                     | -2 | 29.78   | (A)               | 233 29.78     |     |
| U.S. total     | 4,658(B)                | 7  | 29.19   | 9                 | 4,667 29.19   |     |
| To-date        |                         |    |         |                   |               |     |
| 2011*          | 171,683(B)              |    |         | 268               | 171,951       |     |
| To-date        |                         |    |         |                   |               |     |
| 2010*          | 170,276(B)              |    |         | 283               | 170,559       |     |

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 11,000; for the current year to date\* 812,000; for last year to date\* 825,000.

\*Note: Year to-date totals reflect comparable time periods.

**Weekly National Fresh and Frozen Whole Young Turkeys**

Weighted Average Prices, cents per pound, F.O.B. Shipper Dock Basis - Week Ending October 07, 2011

**FROZEN Whole Body Turkeys** - commodity pack or equivalent; minimum 10,000 lb lots; current negotiation for delivery within two weeks.

| U.S. Grade A - FROZEN | Current Week       |                   | Last Week           |                   | Last Year          |                   | September Averages |            |           |
|-----------------------|--------------------|-------------------|---------------------|-------------------|--------------------|-------------------|--------------------|------------|-----------|
|                       | wtd avg (cents/lb) | volume (000 lbs.) | wtd avg (cents/lb)  | volume (000 lbs.) | wtd avg (cents/lb) | volume (000 lbs.) | This Month         | Last Month | Last Year |
| 8-16 lb. (Hens)       | 112.08             | 240               | 112.20 <sup>1</sup> |                   | 105.83             | 39                | 109.79             | 105.39     | 102.02    |
| 16-24 lb. (Toms)      | 111.25             | 160               | 109.90 <sup>1</sup> |                   | 105.00             | 12                | 108.87             | 106.91     | 100.28    |

<sup>1</sup> based on offers.

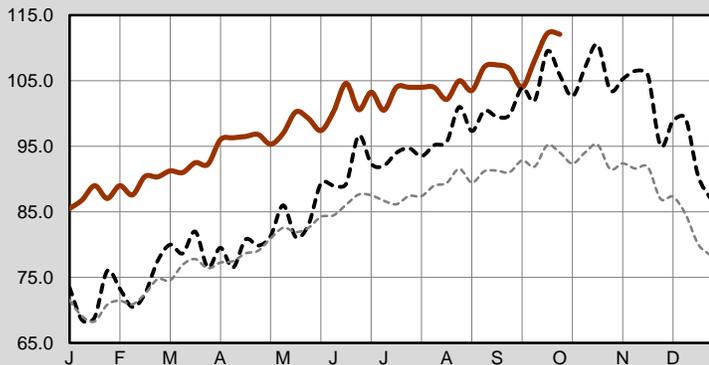
**FRESH Whole Body Turkeys** - with timers; for delivery within the next seven days.

| U.S. Grade A - FRESH           | Current Week       |                   | Last Week          |                   | Last Year          |                   | September Averages |            |           |
|--------------------------------|--------------------|-------------------|--------------------|-------------------|--------------------|-------------------|--------------------|------------|-----------|
|                                | wtd avg (cents/lb) | volume (000 lbs.) | wtd avg (cents/lb) | volume (000 lbs.) | wtd avg (cents/lb) | volume (000 lbs.) | This Month         | Last Month | Last Year |
| <b>Priced At Time Of Sale:</b> |                    |                   |                    |                   |                    |                   |                    |            |           |
| 8-16 lb. (Hens)                | 124.89             | 118.2             | 124.27             | 116.5             | 111.98             | 171.0             | 122.27             | 116.91     | 108.84    |
| 16-24 lb. (Toms)               | 125.81             | 65.0              | 124.42             | 71.0              | 112.00             | 60.0              | 122.67             | 115.92     | 108.57    |
| <b>Price To Be Determined:</b> |                    |                   |                    |                   |                    |                   |                    |            |           |
| 8-16 lb. (Hens)                | --                 | 2.5               | --                 | 2.5               | --                 | 5.0               | --                 | --         | --        |
| 16-24 lb. (Toms)               | --                 | 2.5               | --                 | 2.5               | --                 | 5.0               | --                 | --         | --        |

— 2011 — 2010 — Prior 3 Year Avg.

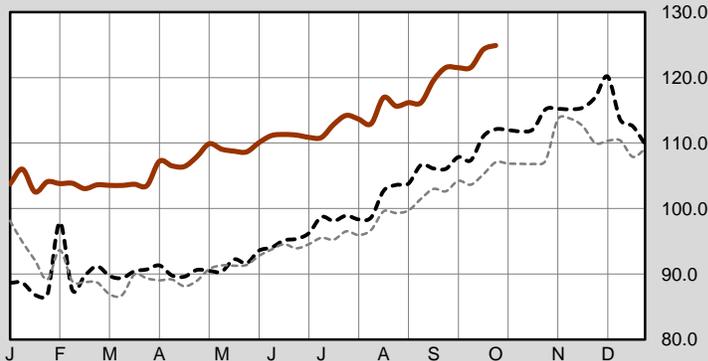
**National FROZEN Hen Trend**

(weighted average price in cents per pound; f.o.b. shipper dock)

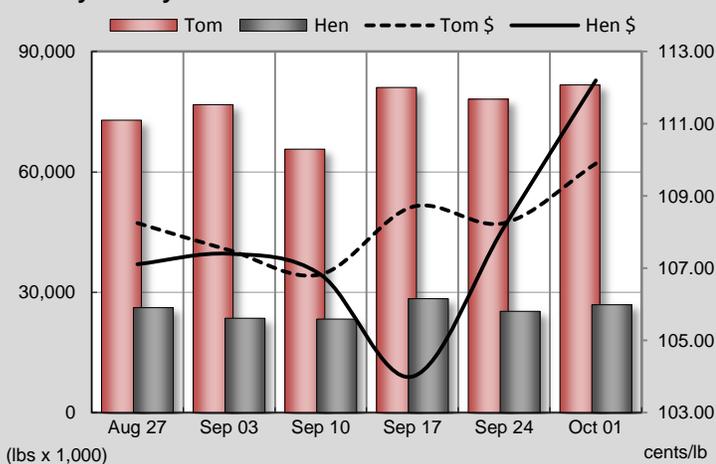


**National FRESH Hen Trend**

(weighted average price in cents per pound; f.o.b. shipper dock)

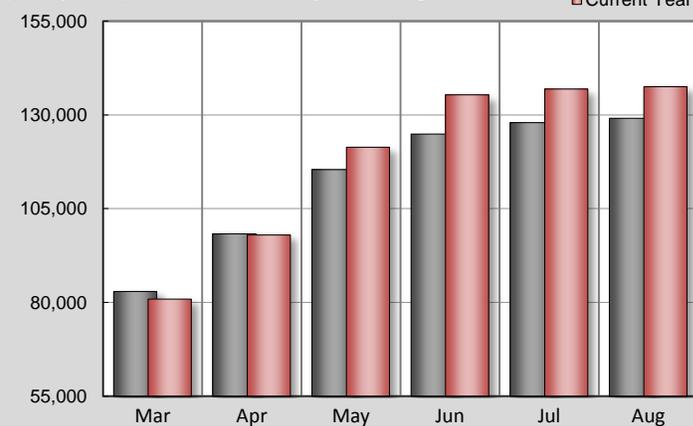


**Weekly Turkey: RTC Volume vs. Frozen Price**



**Cold Storage Holdings - Frozen Hen Turkeys**

(1,000 pounds) Source: NASS Monthly Cold Storage



**National Young Turkey Parts**

Including bulk meat and frozen (unless specified), cents per lb., delivered first receivers, part and full trucklots as of 06 Oct 2011.

The market on bulk parts was fully steady to firm. Demand was moderate to good and best for export. Offerings limited. The market on tom breast meat was steady to firm, balance of white meat steady. Demand and offerings light to moderate. The thigh meat market is steady to fully steady. Demand was moderate. Offerings light. Trading was slow to moderate. For domestic: fresh full cut wings 85 cents and frozen A grade breast 10-12lb. breast 175 cents, 12-14 lb. breast 175 cents, 14-16 lb. breast 180 cents and 16-18 lb. breast 190 cents.

| <b>Domestic Trading</b>             | <b>Price Range</b> | <b>L.S.T. Code 1/</b> | <b>Wtd Avg Price</b> | <b>Volume (000)</b> |
|-------------------------------------|--------------------|-----------------------|----------------------|---------------------|
| Breasts, 4-8 lbs. Grade A 2/        | 134.00             |                       | 134.00               | 40                  |
| Breasts, 4-8 lbs. Grade A--Fresh 2/ | 145.00-189.00      |                       | 165.33               | 30                  |
| Breasts, 4-8 lbs. Plant Grade 2/    |                    |                       |                      |                     |
| Drumsticks, Tom                     | 92.00-95.00        |                       | 92.24                | 44                  |
| Drumsticks, Tom--Fresh              |                    | W                     | 84.00                | 40                  |
| Drumsticks, Hen                     |                    | W                     | 84.00                | 4                   |
| Wings, Full-Cut, Tom                | 91.00              |                       | 91.00                | 80                  |
| Wings, Full-Cut, Hen                |                    | W                     | 84.00                | 4                   |
| Wings, V-Type, Tom                  | 116.00-117.00      |                       | 116.77               | 36                  |
| Wings, V-Type, Hen                  |                    |                       |                      |                     |
| Necks, Tom                          | 46.00-47.00        |                       | 46.25                | 80                  |
| Necks, Hen                          |                    | W                     | 39.00                | 2                   |
| Breasts, B/S, Tom 3/                |                    | M                     | 256.00               | 80                  |
| Breasts, B/S, Tom--Fresh 3/         |                    | M                     | 267.00               | 40                  |
| Thigh Meat                          | 138.00             |                       | 138.00               | 11                  |
| Thigh Meat--Fresh                   | 136.00             |                       | 136.00               | 40                  |
| Breast Trim Meat                    | 170.00             |                       | 170.00               | 40                  |
| Scapula Meat                        |                    | F                     | 192.00               | 16                  |
| Wing Meat with Skin                 |                    | T                     | 160.00               | 7                   |
| Tenderloins                         |                    | F                     | 215.00               | 2                   |
| Destrapped Tenders                  |                    |                       |                      |                     |
| Destrapped Tenders--Fresh           | 238.00             |                       | 238.00               | 40                  |
| Mechanically Separated 4/           |                    | W                     | 35.00                | 40                  |
| Mechanically Separated--Fresh 4/    |                    | W                     | 33.00                | 251                 |
| <b>Export Trading</b>               |                    |                       |                      |                     |
| Drumsticks, Toms                    | 116.00             |                       | 116.00               | 54                  |
| Wings Full-Cut - Toms               |                    |                       |                      |                     |
| Wings, V-Type, Tom                  | 119.00             |                       | 119.00               | 216                 |
| Tails                               |                    | W                     | 49.89                | 148                 |
| Mechanically Separated 4/           |                    |                       |                      |                     |
| Thigh Meat - Frozen                 |                    | F                     | 135.00               | 54                  |

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 07 Oct 2011.

The market on bulk parts was fully steady to firm. Demand was moderate to good and best for export. Offerings limited. The market on tom breast meat was steady to firm, balance of white meat steady. Demand and offerings light to moderate. The thigh meat market is steady to fully steady. Demand was moderate. Offerings light. Trading was slow to moderate. For domestic: fresh full cut wings 85-88 cents, fresh hen breeder breast meat 218 cents, fresh scapula 191 cents, fresh tom necks 45-47 cents and fresh tails 49-54 cents. For export: fresh thigh meat 137 cents and fresh tom drums 85 cents.

| Domestic Trading                    | Price Range   | L.S.T Code<br>1/ | Wtd Avg Price | Volume (000) | Weekly Wtd Avg Price | Weekly Volume (000) |
|-------------------------------------|---------------|------------------|---------------|--------------|----------------------|---------------------|
| Breasts, 4-8 lbs. Grade A 2/        | 134.00        |                  | 134.00        | 40           | 133.25               | 160                 |
| Breasts, 4-8 lbs. Grade A--Fresh 2/ |               | R                | 165.33        | 30           | 165.33               | 30                  |
| Breasts, 4-8 lbs. Plant Grade 2/    |               |                  |               |              |                      |                     |
| Drumsticks, Tom                     | 90.00-93.00   |                  | 92.67         | 45           | 92.46                | 89                  |
| Drumsticks, Tom--Fresh              | 84.00-90.00   |                  | 87.24         | 331          | 86.26                | 766                 |
| Drumsticks, Hen                     |               | W                | 84.00         | 4            | 84.00                | 4                   |
| Wings, Full-Cut, Tom                | 90.00-93.00   |                  | 91.80         | 200          | 91.17                | 307                 |
| Wings, Full-Cut, Hen                |               | W                | 84.00         | 4            | 84.00                | 4                   |
| Wings, V-Type, Tom                  |               | R                | 116.77        | 36           | 116.61               | 71                  |
| Wings, V-Type, Hen                  |               |                  |               |              |                      |                     |
| Necks, Tom                          | 44.00-46.00   |                  | 44.33         | 48           | 46.34                | 305                 |
| Necks, Hen                          |               | W                | 39.00         | 2            | 39.00                | 2                   |
| Breasts, B/S, Tom 3/                | 259.00        |                  | 259.00        | 80           | 257.50               | 160                 |
| Breasts, B/S, Tom--Fresh 3/         | 267.00        |                  | 267.00        | 160          | 267.00               | 200                 |
| Thigh Meat                          | 136.00        |                  | 136.00        | 88           | 136.10               | 109                 |
| Thigh Meat--Fresh                   | 136.00-137.00 |                  | 136.12        | 156          | 135.60               | 451                 |
| Breast Trim Meat                    | 164.00        |                  | 164.00        | 80           | 166.41               | 170                 |
| Scapula Meat                        | 194.00        |                  | 194.00        | 40           | 194.00               | 40                  |
| Wing Meat with Skin                 | 160.00        |                  | 160.00        | 40           | 160.00               | 47                  |
| Tenderloins                         |               | F                | 215.00        | 2            |                      |                     |
| Destrapped Tenders                  | 220.00        |                  | 220.00        | 24           | 220.00               | 24                  |
| Destrapped Tenders--Fresh           |               | R                | 238.00        | 40           | 239.13               | 64                  |
| Mechanically Separated 4/           |               | W                | 35.00         | 40           | 34.00                | 80                  |
| Mechanically Separated--Fresh 4/    | 32.00-33.00   |                  | 32.82         | 221          | 33.21                | 896                 |
| <b>Export Trading</b>               |               |                  |               |              |                      |                     |
| Drumsticks, Toms                    | 92.00-117.00  |                  | 110.24        | 148          | 112.67               | 256                 |
| Wings Full-Cut - Toms               |               |                  |               |              |                      |                     |
| Wings, V-Type, Tom                  |               | R                | 119.00        | 216          | 119.00               | 432                 |
| Tails                               | 51.00         |                  | 51.00         | 40           | 50.13                | 188                 |
| Mechanically Separated 4/           | 36.00         |                  | 36.00         | 80           | 36.00                | 80                  |
| Thigh Meat - Frozen                 |               | F                | 135.00        | 54           |                      |                     |

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