

ArrowStream

Poultry

USDA young chicken harvest for the week was 174.8 million head, which was up 1.2% w/w and higher by 1.4% to the same week last year. Breaking out the segment, the National Composite WOGs was flat at \$1.04/lb. Looking at the parts, the white meat segment was mixed last week. Boneless/skinless breasts were down \$0.01 to \$1.14/lb. Breasts are lower by 1% m/m and down 23% y/y. Chicken tenderloins were flat at \$1.40/lb. Tenderloins are now down 1% m/m and 17% this year. Chicken wings were down \$0.05 to \$1.02/lb, and drumsticks were flat at \$0.47/lb. Wings are down 5% m/m and by 46% y/y. Boneless/skinless thigh meat was flat at \$1.23/lb, and B/I thighs were also flat at \$0.60/lb. Looking at the chart, boneless/skinless thigh meat is down 18% m/m and 24% y/y while being 1% higher compared to the five-year average. In the turkey segment, boneless turkey breasts were up 2% w/w and are higher by 283% this year. Whole B/I turkeys were flat w/w and are up 40% y/y. In the egg market, as we have been reporting in our Friday daily bullets, increasing HPAI cases have led to some strength in prices with the USDA's large eggshell index up another 11% w/w and 53% m/m. Looking ahead, wholesale prices across the chicken complex have posted notable declines over the past several months as broiler production surged and post-summer-grilling demand eased. The pace of those declines has moderated in recent weeks, and the market is expected to remain generally steady through the end of 2025. FOB per pound except when noted.

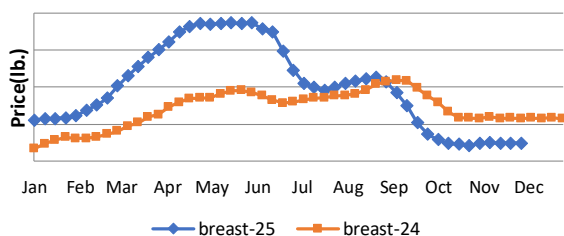
Description	Market Trend	Supplies	Price vs. Last Year
Chicken WOG National	Increasing	Steady-Short	Lower
Whole Wings	Decreasing	Available	Lower
Drumsticks	Decreasing	Available	Lower
Breasts Boneless/Skinless	Increasing	Available	Lower
Breasts Line Run	Increasing	Steady-Available	Lower
Stripped Backs and Necks	Increasing	Steady	Lower
Tenderloins	Increasing	Available	Lower
Legs - Bone-in	Increasing	Available	Lower
Bulk Leg Quarters	Increasing	Available	Lower
Thighs Bone-In	Increasing	Available	Lower
Thighs Boneless/Skinless	Decreasing	Available	Lower

Description	Market Trend	Supplies	Price vs. Last Year
Whole Turkey (8-16 lb)	Steady	Steady	Higher
Turkey Breast, Bnls/Sknls	Increasing	Steady-Short	Higher

Eggs

Description	Market Trend	Supplies	Price vs. Last Year
Large Eggs (dozen)	Increasing	Short	Lower
Medium Eggs (dozen)	Decreasing	Steady-Short	Lower
Liquid Whole Eggs	Decreasing	Steady-Available	Lower
Liquid Egg Whites	Decreasing	Steady	Higher
Liquid Egg Yolks	Steady	Steady-Available	Higher
Egg Breaker Stock Central	Decreasing	Steady	Lower

Boneless Skinless Chicken Breast



Large Shell Eggs

