

Tennessee Market Highlights

UTEXTENSION
INSTITUTE OF AGRICULTURE
THE UNIVERSITY OF TENNESSEE

May 7, 2021

Number: 18

Trends for the Week Compared to a Week Ago

Slaughter Cows

steady to \$1 higher

Slaughter Bulls

steady to \$1 higher

Feeder Steers

\$2 to \$6 lower

Feeder Heifers

steady to \$5 lower

Feeder Cattle Index: 131.56

Fed Cattle

The 5-area live price on Thursday of \$118.35 was down \$0.54. The dressed price of \$188.47 was down \$1.94.

Corn

July closed at \$7.32 a bushel, up 59 cents since last Friday.

Soybeans

July closed at \$15.89 a bushel, up 55 cents since last Friday.

Wheat

July closed at \$7.61 a bushel, up 27 cents since last Friday.

Cotton

July closed at 89.66 cents per lb, up 1.58 cents since last Friday.

Livestock Comments by Dr. Andrew P. Griffith

FED CATTLE: Fed cattle traded steady to \$1 lower compared to last week on a live basis. Prices on a live basis were primarily \$118 to \$119 while dressed prices were mostly \$187 to \$189.

The 5-area weighted average prices thru Thursday were \$118.35 live, down \$0.54 compared to last week and \$188.47 dressed, down \$1.94 from a week ago. A year ago, prices were \$100.04 live and \$159.40 dressed.

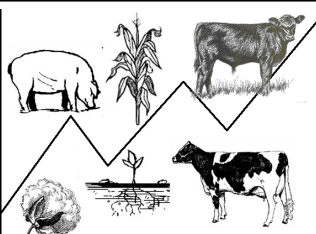
There are many factors that can drag the feeder cattle market to a low point. There are not as many that can place pressure on the finished cattle market. Packing capacity is the most likely culprit for the soft finished cattle market relative to extremely strong boxed beef prices. Packers have all the reason in the world from a profit standpoint to run line speeds as fast as possible, but they cannot slaughter all the market ready animals. There is approximately 5,000 head per day capacity planned to come on line split between four different facilities, but that will do nothing until they begin competing for cattle. Packing is the bottleneck in the market at this time, which has been really good for the packing industry and not so much for cattle producers.

BEEF CUTOUT: At midday Friday, the Choice cutout was \$305.96 down \$0.41 from Thursday and up \$9.59 from a week ago. The Select cutout was \$283.67 up \$3.04 from Thursday and up \$8.73 from last week. The Choice Select spread was \$13.56 compared to \$12.70 a week ago. The beef market must be a balloon filled with hot air or helium, because it continues to rise. What goes up must come down, but there is no timetable for when that has to happen. There are two ways for a balloon to come down. The first is for the air to slowly cool or the helium to

slowly leak out, which results in a slow and somewhat predictable descent. The other is for pressure to burst the balloon resulting in a free fall. There is no way to know which route beef prices will take, but they will decline at some point. The preferred method would be for prices to soften in a slow and predictable manner, but the cattle and beef complex have become accustomed to volatility. Thus, a sudden and violent price decline is possible. Packers will continue to market beef at the elevated price levels as long as possible. This may last longer than most expect given strong beef demand. What packers have no intention of doing is passing any profits down the line to cattle producers. The producer's day will come, but it will take several more months.

OUTLOOK: Based on Tennessee weekly auction market data, steer prices were \$2 to \$6 lower compared to last week while heifer prices were steady to \$5 lower compared to a week ago. Slaughter cow prices were steady to \$1 higher while bull prices were steady to \$1 higher compared to the previous week. The calf and feeder cattle markets are perfect examples of markets with all the cards stacked against them. The fed cattle pipeline is full with packers slaughtering as many cattle as they desire, which has kept fed cattle prices in check. Corn prices have increased rapidly and appear to be supported at the higher price level. Drought dominates much of the Western United States as well as a large portion of the Plain States, which could lead to even more heifers destined for the feedlot. All of these situations result in lower feeder cattle and calf prices. Is there a light at the end of the tunnel, and when are prices going to improve? There definitely is a light at the end of the tunnel, and the light gets brighter as the market gets worse even if it is farther away. It will likely be the end

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Livestock Comments by Dr. Andrew Griffith

(Continued from page 1)

of summer or the beginning of fall before the market demonstrates any semblance of improvement or recovery. That means there are several more months to suffer through this weak market. If drought persists and encroaches more on the Corn Belt then a more dismal market may still be ahead of the cattle industry. It is not all bad news, because one thing that is known is that good times tend to follow the bad times. Thus, cattle producers can look forward to the market recovering and demonstrating considerable strength at some point. There is a good chance the market one year from now will not bear any resemblance to the current market. Between now and next year, cattle producers will have to manage costs carefully and be even more diligent in their marketing if they want to realize profits in the cattle business.

ASK ANDREW, TN THINK TANK: At a producer meeting this week, an individual asked if he would be better off from a profitability standpoint stocking a new piece of ground by purchasing bred cows, bred heifers, or breeding some of his own heifers. This is an extremely difficult question to answer. The final answer really comes back to the expected net present value of each alternative and the current market conditions. If a person is in the situation of having to market a group of open heifers at extremely low prices then breeding

them and starting a new herd may be a feasible alternative. However, if bred heifers, bred cows, or three-in-one cows are available for purchase then that also has to be evaluated. Net present value is the best determinant of this decision, because cash outlays and revenue streams may start at different points for each alternative in a commercial operation. For niche markets or for producers who manage genetics very strictly, the alternatives may be slightly different. This is a question that takes some math skills to answer.

Please send questions and comments to agriff14@utk.edu or send a letter to Andrew P. Griffith, University of Tennessee, P.O. Box 160, 1000 Main Entrance Dr., Spring Hill, TN 37174.

FRIDAY'S FUTURES MARKET CLOSING PRICES: Friday's closing prices were as follows: Live/fed cattle –June \$116.03 +0.55; August \$118.85 +0.38; October \$123.45 -0.03; Feeder cattle –May \$131.73 +1.25; August \$144.28 +0.88; September \$146.05 +0.50; October \$147.75 +0.28; May corn closed at \$7.73 up 13 cents from Thursday.

Crop Comments by Dr. Aaron Smith

Overview

Corn, soybeans, wheat, and cotton were up for the week.

What a difference a year makes! On May 7, 2020, December corn closed at \$3.34, November soybeans at \$8.48 $\frac{1}{4}$, December cotton at 56.95 cents, and July wheat at \$5.22 $\frac{1}{2}$. All four commodities experienced dramatic price declines as a result of the COVID-19 pandemic. One year later, May 7, 2021, harvest futures for corn, soybeans, cotton, and wheat closed at \$6.36, \$14.33, 86.89, and \$7.61. Price increases of 90%, 69%, 53%, and 46%. A tremendous change in fortunes in just 12 months. The causes of the prolonged rally have been well documented -- reduced domestic production at the end of the 2020 US growing season -- due to storms and drought, record setting purchases by China for agricultural products, weather issues in South America, and a global/US economic recovery that has pulled most commodity prices higher.

The question on farmers' minds is how high can prices go? The answer will depend on growing conditions in the US and other major production regions, continued strong demand by China and other importers, and the direction of the global / US economy. If the current drought intensifies, nearby corn and soybean futures could reach or exceed 2012 highs of \$8.43 and \$17.94. Alternatively, if drought conditions improve, new crop futures prices could take a step back to \$5.00-\$6.00 and \$11.50-\$13.00 range, still well above recent prices over the past five years. It does seem very unlikely (not impossible) for prices to retreat to year ago levels. Overall the short term bias is for increased prices.

Exports continue to be one of the key drivers in the current price rally, however the pace of new sales, for the current marketing year, has waned in recent weeks. This is largely due to limited stocks available for old crop sales. New crop (2021) sales will provide greater insight into demand at current prices as we move through the production season. Actual export shipments remain very strong with previous weekly/monthly sales departing US ports at a very robust pace. With exports sales data it is important to distinguish between current and next marketing year sales and sales versus shipments.

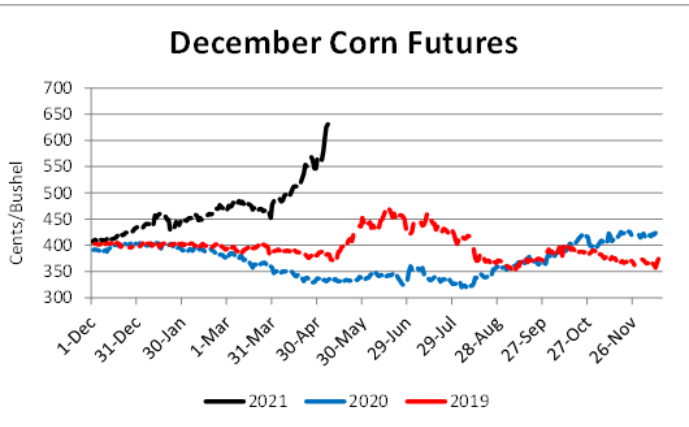
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Crop Comments by Dr. Aaron Smith

Corn

Ethanol production for the week ending April 30 was 0.952 million barrels per day, up 7,000 from the previous week. Ethanol stocks were 20.44 million barrels, up 0.704 million barrels compared to last week. Corn net sales reported by exporters for April 23-29, 2021 were down compared to last week with net sales of 5.4 million bushels for the 2020/21 marketing year and 4.2 million bushels for the 2021/22 marketing year. Exports for the same time period were up 15% from last week at 86.4 million bushels. Corn export sales and commitments were 100% of the USDA estimated total exports for the 2020/21 marketing year (September 1 to August 31) compared to the previous 5-year average of 89%. Across Tennessee, average corn basis (cash price-nearby futures price) weakened or remained unchanged at West, Mississippi River, North-Central, West-Central, and North-west elevators and barge points. Overall, basis for the week ranged from 24 over to 74 over, with an average of 48 over the July futures at elevators and barge points. July 2021 corn futures closed at \$7.32, up 59 cents since last Friday. For the week, July 2021 corn futures traded between \$6.74 and \$7.35. Jul/Sep and Jul/Dec future spreads were -78 and -96 cents. September 2021 corn futures closed at \$6.54, up 62 cents since last Friday.

Corn	Jul 21	Change	Dec 21	Change
Price	\$7.32	\$0.59	\$6.36	\$0.73
Support	\$6.98	\$0.71	\$5.96	\$0.63
Resistance	\$7.42	\$0.79	\$6.42	\$0.86
20 Day MA	\$6.35	\$0.39	\$5.51	\$0.29
50 Day MA	\$5.75	\$0.16	\$5.06	\$0.13
100 Day MA	\$5.40	\$0.14	\$4.74	\$0.09
4-Week High	\$7.35	\$0.51	\$6.38	\$0.45
4-Week Low	\$5.44	\$0.26	\$4.84	\$0.35
Technical Trend	Up	=	Up	=



Nationally, this week's Crop Progress report estimated corn planted at 46% compared to 17% last week, 48% last year, and a 5-year average of 36%; and corn emerged at 8% compared to 3% last week, 7% last year, and a 5-year average of 9%. In Tennessee, corn planted was estimated at 65% compared to 48% last week, 51% last year, and a 5-year average of 61%; and corn emerged at 35% compared to 18% last week, 24% last year, and a 5-year average of 32%. In Tennessee, new crop cash corn prices at elevators and barge points ranged from \$5.53 to \$6.52. December 2021 corn futures closed at \$6.36, up 73 cents since last Friday. Downside price protection could be obtained by purchasing a \$6.40 December 2021 Put Option costing 74 cents establishing a \$5.66 futures floor.

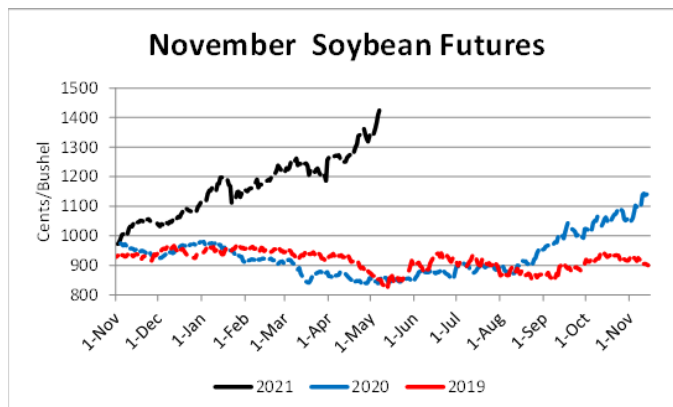
Soybeans

Net sales reported by exporters were down compared to last week with net sales of 6.1 million bushels for the 2020/21 marketing year and 7.1 million bushels for the 2021/22 marketing year. Exports for the same period were down 22% compared to last week at 9.7 million bushels. Soybean export sales and commitments were 99% of the USDA estimated total annual exports for the 2020/21 marketing year (September 1 to August 31), compared to the previous 5-year average of 94%. Across Tennessee, average soybean basis weakened or remained unchanged at Northwest, West, West-Central, North-Central, and Mississippi River elevators and barge points. Basis ranged from 30 over to 64 over the July futures contract. Average basis at the end of the week was 45 over the July futures contract. July 2021 soybean futures closed at \$15.89, up 55 cents since last Friday. For the week, July 2021 soybean futures traded between \$15.15 and \$15.99. Jul/Aug and Jul/Nov future spreads were -52 and -156 cents. July 2021 soybean-to-corn price ratio was 2.17 at the end of the week. August 2021 soybean futures closed at \$15.37, up 66 cents since last Friday.

(Continued on page 4)

Crop Comments by Dr. Aaron Smith

Soybeans	Jul 21	Change	Nov 21	Change
Price	\$15.89	\$0.55	\$14.33	\$0.94
Support	\$15.33	\$0.50	\$13.68	\$0.64
Resistance	\$16.07	\$0.72	\$14.57	\$1.11
20 Day MA	\$14.88	\$0.36	\$13.25	\$0.29
50 Day MA	\$14.36	\$0.16	\$12.72	\$0.17
100 Day MA	\$13.82	\$0.20	\$12.10	\$0.17
4-Week High	\$15.99	\$0.25	\$14.43	\$0.59
4-Week Low	\$13.74	\$0.19	\$12.42	\$0.58
Technical Trend	Up	=	Up	=

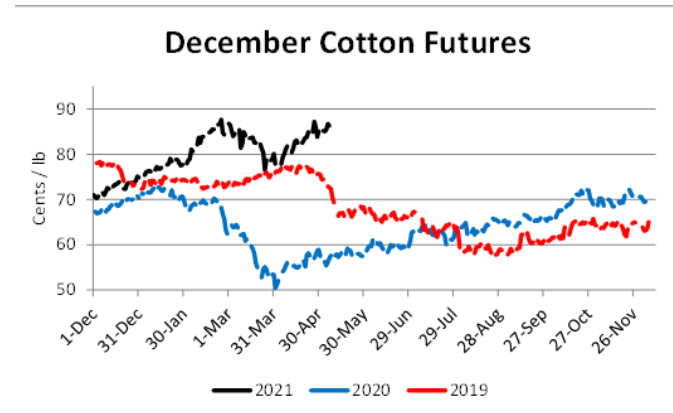


Nationally, this week's Crop Progress report estimated soybeans planted at 24% compared to 8% last week, 21% last year, and a 5-year average of 11%. In Tennessee, soybeans planted were estimated at 15% compared to 8% last week, 13% last year, and a 5-year average of 9%. In Tennessee, new crop cash soybean prices at elevators and barge points ranged from \$13.37 to \$14.41. November 2021 soybean futures closed at \$14.33, up 94 cents since last Friday. Downside price protection could be achieved by purchasing a \$14.40 November 2021 Put Option which would cost 99 cents and set a \$13.41 futures floor. Nov/Dec 2021 soybean-to-corn price ratio was 2.25 at the end of the week.

Cotton

Net sales reported by exporters were up compared to last week with net sales of 63,700 bales for the 2020/21 marketing year and 61,200 bales for the 2021/22 marketing year. Exports for the same time period were up 34% compared to last week at 456,600 bales – a marketing year high. Upland cotton export sales were 105% of the USDA estimated total annual exports for the 2020/21 marketing year (August 1 to July 31), compared to the previous 5-year average of 104%. Delta upland cotton spot price quotes for May 6 were 88.33 cents/lb (41-4-34) and 90.58 cents/lb (31-3-35). Adjusted world price decreased 2.32 cents to 71.39 cents. July 2021 cotton futures closed at 89.66, up 1.58 cents since last Friday. For the week, July 2021 cotton futures traded between 86.36 and 91 cents. Jul/Dec and Jul/Mar cotton futures spreads were -2.77 cents and -3.74 cents.

Cotton	Jul 21	Change	Dec 21	Change
Price	89.66	1.58	86.89	1.83
Support	86.21	2.80	84.82	3.56
Resistance	93.07	1.24	87.82	-0.02
20 Day MA	86.99	1.77	84.22	1.44
50 Day MA	86.00	-0.40	82.90	-0.04
100 Day MA	84.70	0.68	80.70	0.70
4-Week High	91.66	0.00	87.43	0.00
4-Week Low	80.91	1.94	80.00	2.73
Technical Trend	Up	=	Up	=



Nationally, this week's Crop Progress report estimated cotton planted at 16% compared to 12% last week, 17% last year, and a 5-year average of 16%. In Tennessee, cotton planted was estimated at 2% compared to 1% last week, 4% last year, and a 5-year average of 7%. December 2021 cotton futures closed at 86.89 cents, up 1.83 cents since last Friday. Downside price protection could be obtained by purchasing an 87 cent December 2021 Put Option costing 7.77 cents establishing a 79.23 cent futures floor. March 2022 cotton futures closed at 85.92 cents, up 1.61 cents since last Friday.

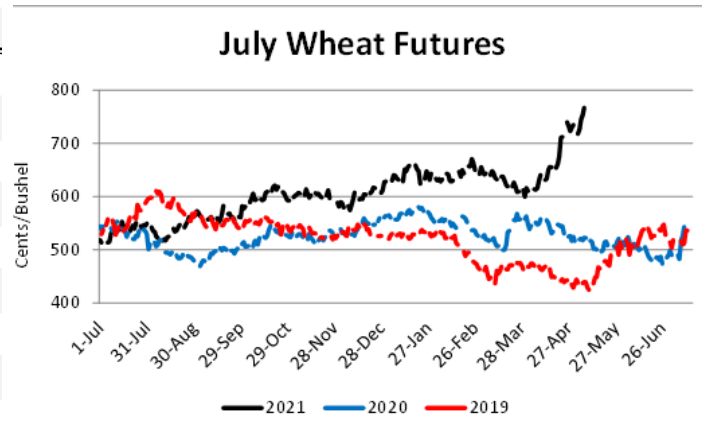
Wheat

Wheat net sales reported by exporters were up compared to last week with net sales of 3.5 million bushels for the 2020/21 marketing year and 14.7 million bushels for the 2021/22 marketing year. Exports for the same time period were up 7% from last week at 21.5 million bushels. Wheat export sales were 96% of the USDA estimated total annual exports for the 2020/21

Crop Comments by Dr. Aaron Smith

marketing year (June 1 to May 31), compared to the previous 5-year average of 105%. In Tennessee, spot wheat prices ranged from \$7.48 to \$7.84.

Wheat	Jul 21	Change	Sep 21	Change
Price	\$7.61	\$0.27	\$7.62	\$0.30
Support	\$7.23	\$0.17	\$7.23	\$0.18
Resistance	\$7.70	\$0.25	\$7.71	\$0.30
20 Day MA	\$7.85	\$1.15	\$7.00	\$0.29
50 Day MA	\$6.57	\$0.09	\$6.57	\$0.09
100 Day MA	\$6.45	\$0.08	\$6.45	\$0.08
4-Week High	\$7.69	\$0.00	\$7.67	\$0.01
4-Week Low	\$6.16	\$0.24	\$6.18	\$0.24
Technical Trend	Up	=	Up	=



Nationally, the Crop Progress report estimated winter wheat condition at 48% good-to-excellent and 19% poor to very poor; winter wheat headed at 27% compared to 17% last week, 30% last year, and a 5-year average of 34%; spring wheat planted at 49% compared to 28% last week, 27% last year, and a 5-year average of 32%; and spring wheat emerged at 14% compared to 7% last week, 6% last year, and a 5-year average of 10%. In Tennessee, winter wheat condition was estimated at 76% good-to-excellent and 3% poor to very poor; winter wheat headed at 59% compared to 33% last week, 78% last year, and a 5-year average of 69%; and winter wheat jointing at 94% compared to 88% last week, 98% last year, and a 5-year average of 95%. July 2021 wheat futures closed at \$7.61, up 27 cents since last Friday. July 2021 wheat futures traded between \$7.13 and \$7.66 this week. Downside price protection could be obtained by purchasing a \$7.65 July 2021 Put Option costing 49 cents establishing a \$7.16 futures floor. July wheat-to-corn price ratio was 1.04. Jul/Sep and Jul/Jul future spreads were 1 and -49 cents. In Tennessee, new crop wheat cash contracts ranged from \$7.00 to \$7.78. September wheat-to-corn futures price ratio was 1.17. September 2021 wheat futures closed at \$7.62, up 30 cents since last Friday. July 2022 wheat futures closed at \$7.12, up 24 cents since last Friday.

Additional Information:

Links for data presented:

U.S. Export Sales - <https://apps.fas.usda.gov/export-sales/esrd1.html>

USDA FAS: Weekly Export Performance Indicator – <https://apps.fas.usda.gov/esrquery/esrpi.aspx>

EIA: Weekly ethanol Plant Production - https://www.eia.gov/dnav/pet/pet_pnp_wprode_s1_w.htm

EIA: Weekly Supply Estimates - https://www.eia.gov/dnav/pet/pet_sum_sndw_a_EPOOXE_sae_mbb1_w.htm

Upland Cotton Reports - <https://www.fsa.usda.gov/FSA/epasReports?area=home&subject=ecpa&topic=fta-uc>

Tennessee Crop Progress - https://www.nass.usda.gov/Statistics_by_State/Tennessee/Publications/

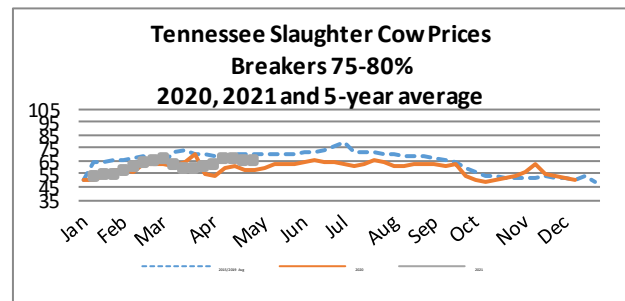
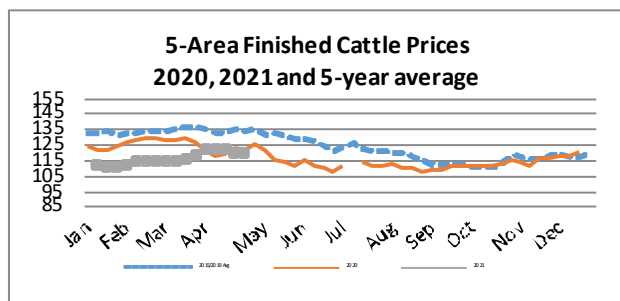
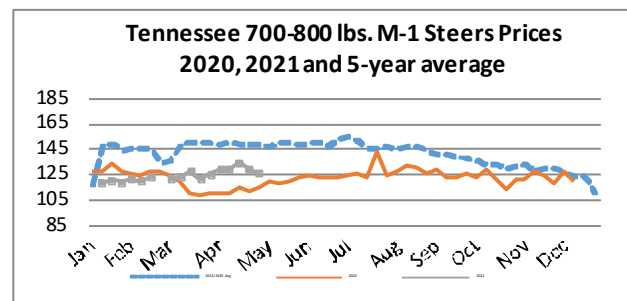
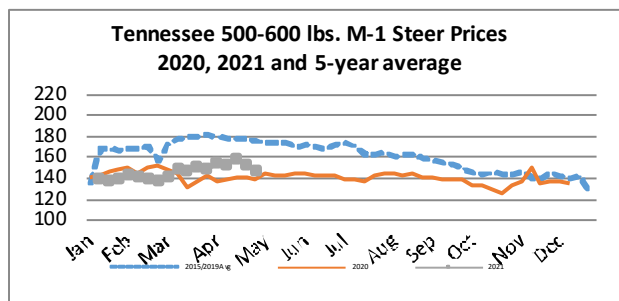
[Crop Progress & Condition/](#)

U.S. Crop Progress - <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1048>

USDA AMS: Market News - <https://www.ams.usda.gov/market-news/search-market-news>

If you would like further information or clarification on topics discussed in the crop comments section or would like to be added to our free email list please contact me at aaron.smith@utk.edu.

Prices Paid to Farmers by Elevators					
Friday, April 30, 2021---Thursday, May 6, 2021					
	Friday Average	Monday Average	Tuesday Average	Wednesday Average	Thursday Average
No. 2 Yellow Soybeans	-----\$/bushel-----				
Northwest	15.65	15.54			16.00
North Central	15.79	15.69			16.15
West Central	15.74	15.64			16.10
West	16.00	15.87			16.30
Mississippi River	15.99	15.86			16.20
Yellow Corn					
Northwest	7.12	7.16			7.42
North Central	7.23	7.30			7.59
West Central	7.23				7.69
West	7.76	7.53			7.84
Mississippi River	7.47	7.47			7.78
Wheat					
Northwest					
North Central	7.65	7.48			7.83
West					
Mississippi River					
Cotton	-----\$/pound-----				
Memphis	85.83-88.08	85.61-87.86	84.92-87.17	85.08-87.33	88.33-90.58



Futures Settlement Prices: Crops & Livestock

Corn: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/corn.html>

Soybeans: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/soybean.html>

Wheat: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/wheat.html>

Soybean Meal: <https://www.cmegroup.com/trading/agricultural/grain-and-oilseed/soybean-meal.html>

Cotton: <https://www.theice.com/products/254/Cotton-No-2-Futures/data?marketId=5352193>

Live Cattle: <https://www.cmegroup.com/trading/agricultural/livestock/live-cattle.html>

Feeder Cattle: <https://www.cmegroup.com/trading/agricultural/livestock/feeder-cattle.html>

Lean Hogs: <https://www.cmegroup.com/trading/agricultural/livestock/lean-hogs.html>

Class III Milk: <https://www.cmegroup.com/trading/agricultural/dairy/class-iii-milk.html>

Prices on Tennessee Reported Livestock Auctions for the week ending Monday, May 3, 2021

	This Week			Last Week's	Year Ago
	Low	High	Weighted Average	Weighted Average	Weighted Average
-----\$/cwt-----					
Steers: Medium/Large Frame #1-2					
300-400 lbs	155.00	186.00	169.49	172.51	158.74
400-500 lbs	142.50	173.00	157.22	163.07	145.25
500-600 lbs	125.00	161.00	144.85	151.81	139.21
600-700 lbs	124.00	146.00	134.65	136.48	123.27
700-800 lbs	115.00	133.00	124.56	128.34	109.75
Steers: Small Frame #1-2					
300-400 lbs	135.00	155.00	146.76	152.62	---
400-500 lbs	126.00	155.00	136.93	143.68	---
500-600 lbs	110.00	132.00	120.86	136.67	---
600-700 lbs	111.00	---	111.00	---	---
Steers: Medium/Large Frame #3					
300-400 lbs	138.00	165.00	150.94	160.08	141.75
400-500 lbs	131.00	160.00	145.87	151.80	136.33
500-600 lbs	120.00	145.00	134.49	140.09	125.27
600-700 lbs	117.50	132.00	125.47	130.75	108.21
700-800 lbs	100.00	115.00	109.32	119.01	100.80
Holstein Steers					
300-400 lbs	---	---	---	---	---
500-600 lbs	---	---	---	103.62	---
700-800 lbs	---	---	---	---	---
Slaughter Cows & Bulls					
Breakers 75-80%	55.00	70.00	64.12	64.98	58.28
Boners 80-85%	53.00	72.00	63.57	63.44	58.21
Lean 85-90%	42.00	63.00	55.21	55.56	50.15
Bulls YG 1	78.00	98.00	89.10	87.86	83.30
Heifers: Medium/Large Frame #1-2					
300-400 lbs	126.00	167.00	140.52	146.76	133.57
400-500 lbs	120.00	151.00	133.81	140.93	124.98
500-600 lbs	113.00	141.00	126.65	131.30	116.17
600-700 lbs	106.00	128.00	118.15	118.47	103.82
Heifers: Small Frame #1-2					
300-400 lbs	132.50	132.50	132.50	134.11	110.90
400-500 lbs	114.00	131.00	121.39	124.68	114.04
500-600 lbs	120.00	120.00	120.00	70.00	---
600-700 lbs	---	---	---	108.97	---
Heifers: Medium/Large Frame #3					
300-400 lbs	117.00	142.50	132.41	140.74	120.08
400-500 lbs	110.00	136.00	128.10	132.74	116.99
500-600 lbs	110.00	127.00	119.14	123.51	106.97
600-700 lbs	104.00	115.00	109.29	111.84	96.67

Cattle Receipts

This week:5,637

Week ago:8,156

Year ago:6,831

Link to report: https://www.ams.usda.gov/mnreports/ams_2063.pdf

Graded Sales, Video Board Sales, Video Sales & Loads

Graded Sheep & Goat Sale

Browning Livestock Market Video/Internet Auction- Lafayette, TN

Weighted Average Report for 05/5/2021

Total Receipts: 120

1 load of steers, avg 750 lbs., \$134.00

1 load of steers, avg 800 lbs., \$129.25

For complete report:

https://www.ams.usda.gov/mnreports/ams_3467.pdf

Hodge Livestock Network-May 6, 2021

1 load of heifers; est. wt. 700 lbs. Range 600-800 lbs.; Approx.

70% Black & BWF, 20% Char-X , and 10% Reds, 4 to 5 very light ear; 70% #1s and 20% #1 ½, and 10% good #2's; 80 %

Medium to 20% Large; Light Medium to Medium flesh;

\$114.00

1 load of steers; est. wt. 925 lbs. Range 850-1,000 lbs.; Ap-

prox. 88% Black & BWF, 10% Char-X , and 2% Reds; 80% #1s

and 20% #1 ½; Medium to Large; Medium flesh; \$115.50

Lower Middle Tennessee Cattlemen's Association-Video Board Sale-Columbia, TN

Weighted Average Report for 05/07/2021

Total Receipts:

For complete report: https://www.ams.usda.gov/mnreports/ams_3340.pdf

Department of Agricultural and Resource Economics

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USDA / Tennessee Department of Agriculture Market News Service <https://www.tn.gov/agriculture/farms/news.html>

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