

# Tennessee Market Highlights

**UTEXTENSION**  
INSTITUTE OF AGRICULTURE  
THE UNIVERSITY OF TENNESSEE

February 24, 2023

Number: 8

## Trends for the Week Compared to a Week Ago

### Slaughter Cows

\$1 to \$3 higher

### Slaughter Bulls

Steady to \$2 higher

### Feeder Steers

\$2 to \$6 higher

### Feeder Heifers

\$3 to \$8 higher

Feeder Cattle Index: 182.57

### Fed Cattle

The 5-area live price on Thursday of \$163.65 was up \$2.94. The dressed price of \$259.93 was up \$3.63.

### Corn

March closed at \$6.50 a bushel, down 27 cents since last Friday.

### Soybeans

March closed at \$15.29 a bushel, up 2 cents since last Friday.

### Wheat

March closed at \$7.08 a bushel, down 57 cents since last Friday.

### Cotton

March closed at 85.13 cents per lb, up 4.88 cents since last Friday.

## Livestock Comments by Dr. Andrew P. Griffith

**FED CATTLE:** Fed cattle traded \$2 to \$3 higher than last week on a live basis. Prices on a live basis were mainly \$163 to \$164 while dressed prices were mainly \$259 to \$260.

The 5-area weighted average prices thru Thursday were \$163.65 live, up \$2.94 compared to last week and \$259.93 dressed, up \$3.36 from a week ago. A year ago, prices were \$143.40 live and \$227.02 dressed.

It was not long ago that cattle feeders were under the pressure of packers and had to bend and flex to their desires. The tide has turned and now packers are being forced to bend and flex as cattle feeders have the advantage due to a reduced number of market ready cattle. On top of the number of cattle available, dressed weights are much lower than a year ago. Steer dressed weights to start 2023 are 10 to 15 pounds lighter than last year while heifer dressed weights are closer to 20 pounds lighter than the start of 2022. This has packers competing for all the cattle that are not under contract. Cattle feeders are expected to maintain this leverage for the foreseeable future.

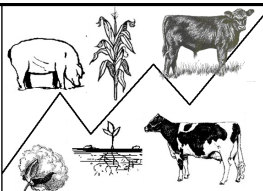
**BEEF CUTOUT:** At midday Friday, the Choice cutout was \$288.31 up \$0.40 from Thursday and up \$7.42 from a week ago. The Select cutout was \$276.65 up \$0.78 from Thursday and up \$10.00 from last week. The Choice Select spread was \$11.66 compared to \$14.24 a week ago.

Choice wholesale beef prices are at their highest level in over a year. Prices are certainly outperforming most people's expectations, and it would appear they remain primed to continue increasing. There is concern amongst some that consumers will not be able to afford beef due to inflation, higher interest rates and increasing beef prices. Regardless if this thought process seems logical, there is no reason to

presume this will actually occur. Up to this point, the domestic market has been experiencing inflation, higher interest rates and high retail beef prices for many months, but consumer demand for beef appears to be strong despite all of these circumstances. The assumption at this point is that wholesale beef prices will continue to increase as the summer grilling season is on the horizon. Will prices push past \$300? The answer is unknown, but it would appear it could happen sooner rather than later. The expected lower production is likely the largest factor pushing beef prices higher.

**OUTLOOK:** Based on Tennessee weekly auction price averages, steer prices were \$2 to \$6 higher this week compared to last week while heifer prices were \$3 to \$8 higher compared to the previous week. Slaughter cow prices were \$1 to \$3 higher than last week while slaughter bull prices were steady to \$2 higher compared to a week ago. The mid-winter calf market is outperforming expectations as cattle meant for spring grass turnout are a hot commodity. The price of 550 pound steers in Tennessee has increased around \$30 per hundredweight since the beginning of the year, and approximately \$20 per hundredweight of that increase has been during February. This means 550 pound steer values have increased \$165 per head since the start of the year. With such a strong increase in prices during the month of February, some may expect price movement in March and April to be much more subdued compared to historical expectations. Frankly, attempting to guess or thinking one will be correct could be a costly error. There is no reason to expect prices to slow their positive price movement until such a slowing is actually experienced. There is a lot more of the spring market to work through and the number

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## Livestock Comments by Dr. Andrew Griffith

(Continued from page 1)

of calves made available is likely to decline and thus support prices. With the increase in calf prices, stocker and back-grounding operations may need to consider price risk management for cattle to be sold in late summer and fall. The CME feeder cattle index is currently trading near \$182.50 per hundredweight and the summer and fall feeder cattle futures contracts are anticipating feeder cattle prices to increase \$30 to \$35 per hundredweight over the next six to eight months. Such a price increase is not uncommon, and prices could increase even more than what is being predicted right now. However, the question is if cattle buyers today can afford to take on the risk of price expectations declining.

The February cattle on feed report for feedlots with a 1000 head or more capacity indicated cattle and calves on feed as of February 1, 2023 totaled 11.70 million head, down 4.1% compared to a year ago, with the pre-report estimate average expecting a 3.9% decline. January placements in feedlots totaled 1.93 million head, down 3.6% from a year ago with the pre-report estimate average expecting placements down 2.8%. January marketing's totaled 1.77 million head up 4.2% from 2022 with pre-report estimates expecting a 4.0% increase in marketings. Placements on feed by weight: under 700 pounds down 4.6%, 700 to 899 pounds down 2.3%, 900 pounds and over down 5.7%.

**ASK ANDREW, TN THINK TANK:** A question concerning a specific operation was asked this week. In general, the question related to cooperating with other cattle producers and insuring everyone was profitable while maintaining autonomy. There is no reason to pretend everyone can be profitable in all situations, but this question did spur me to think about the opportunities cattle producers have to work together. In doing so, producers could assist each other in adding total value to the animals being produced. This same question also reminded me of the importance of relationship in any business. The cattle business is an extremely small business as it relates to the number of people actively involved. Word of a negative experience travels quickly and broadly, which could put a person in a tough situation. Thus, it is imperative to try to foster these relationships. There will certainly be people producers make the decision to not do business with, but that does not mean the bridge needs to be burned.

Please send questions and comments to [agriff14@utk.edu](mailto: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 –February \$165.20 +0.05; April \$165.38 +0.05; June \$161.08 -0.20; Feeder cattle –March \$189.08 -0.15; April \$193.58 -0.10; May \$198.05 +0.33; August \$211.53 +0.18; March corn closed at \$6.50 down 10 cents from Thursday.

## Crop Comments by Dr. Aaron Smith

### Overview

Corn and wheat were down; cotton was up; and soybeans were mixed for the week.

On Thursday February 23 at the annual USDA Agricultural Outlook Forum updated supply and demand projections for the 2023 crop were released.

For corn, production was projected at 15.085 billion bushels, based on a 181.5 bu/acre national average yield and harvested acreage of 83.1 million acres (91 million acres planted). If realized this would be a 1.355-billion-bushel increase over the 2022 crop. On the demand side, exports were projected to increase to 2.2 billion bushels, up 275 million bushels compared to the current marketing year. Total corn use was projected at 14.49 billion bushels. Ending stocks were projected up 620 million bushels at 1.887 billion. Season average farm price was projected at \$5.60, down \$0.90 cents compared to the current marketing year.

Soybean production was projected at 4.51 billion bushels based on a national average yield of 52 bu/acre and harvested acreage of 86.7 million (87.5 million acres planted). Exports and crush were both increased year-over-year resulting in total use increasing from 4.34 billion to 4.461 billion bushels. Projected ending stocks and season average farm price were projected at 290 million bushels, up 65 million bushels year-over-year, and \$12.90, down \$1.40.

Cotton acreage planted was lower than the NCC survey estimate at 10.9 million acres. Yield per harvested acre was projected at 852 lbs./acre resulting in projected production of 15.8 million bales, up 1.12 million bales year-over-year. Exports were projected to increase 1.8 million bales to 13.8 million bales for the 2023/24 marketing year. U.S. ending stocks are projected to fall 300,000 bales to 4 million bales and season average price was projected at 80 cents, 3 cents lower than the current marketing year.

	Previous	Current	Change
USD Index	103.78	105.16	1.38
Crude Oil	76.34	76.32	-0.02
DJIA	33,827	32,816	-1,011

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## Crop Comments by Dr. Aaron Smith

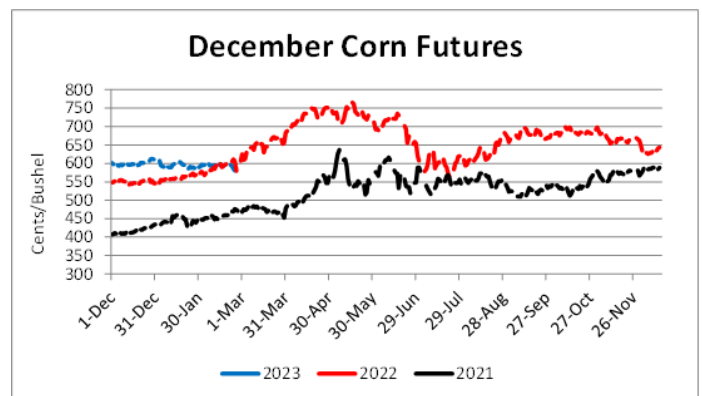
All wheat production was projected at 1.887 billion bushels, up 237 million compared to 2022. National average yield and harvested acreage was projected at 49.2 bu/acre and 38.4 million acres. Total wheat use was increased 67 million bushels, largely due to increased exports. U.S. wheat stocks were projected to grow year-over-year by 40 million bushels. Season average price was projected 50 cents lower at \$8.50.

USDA projections will continue to be revised throughout the 2023 production year. However, the February projections paint a more bearish picture than the one realized for the 2022 crop. A great deal of uncertainty remains for the 2023 crop, but producers should consider risk management strategies that can limit downside price risk.

### Corn

Ethanol production for the week ending February 17 was 1.029 million barrels per day, up 15,000 from the previous week. Ethanol stocks were 25.588 million barrels, up 0.249 million compared to last week. Corn net sales reported by exporters for February 10-16 were 32.4 million bushels for the 2022/23 marketing year and 1.0 million bushels for the 23/24 marketing year. Exports for the same period were up 3% compared to last week at 27.1 million bushels. Corn export sales and commitments were 59% of the USDA estimated total annual exports for the 2022/23 marketing year (September 1 to August 31) compared to the previous 5-year average of 75%. Across Tennessee, average corn basis (cash price-nearby futures price) weakened or remained unchanged at West, Northwest, North-Central, West-Central, and Mississippi River elevators and barge points. Overall, basis for the week ranged from 40 under to 42 over, with an average of 14 over the March futures at elevators and barge points. March 2023 corn futures closed at \$6.50, down 27 cents since last Friday. For the week, March 2023 corn futures traded between \$6.49 and \$6.83. May 2023 corn futures closed at \$6.49, down 28 cents since last Friday. Mar/May and Mar/Dec future spreads were -1 and -74 cents.

Corn	Mar 23	Change	Dec 23	Change
Price	\$6.50	-\$0.27	\$5.76	-\$0.19
Support	\$6.41	-\$0.32	\$5.66	-\$0.24
Resistance	\$6.66	-\$0.15	\$5.91	-\$0.08
20 Day MA	\$6.76	-\$0.02	\$5.92	-\$0.01
50 Day MA	\$6.70	\$0.02	\$5.95	-\$0.01
100 Day MA	\$6.73	\$0.00	\$6.05	-\$0.01
4-Week High	\$6.88	\$0.00	\$5.98	-\$0.08
4-Week Low	\$6.41	-\$0.20	\$5.74	-\$0.09
Technical Trend	Down	-	Down	=



New crop cash prices ranged from \$4.96 to \$6.01 at elevators and barge points. December 2023 corn futures closed at \$5.76, down 19 cents since last Friday. Downside price protection could be obtained by purchasing a \$5.80 December 2023 Put Option costing 46 cents establishing a \$5.34 futures floor.

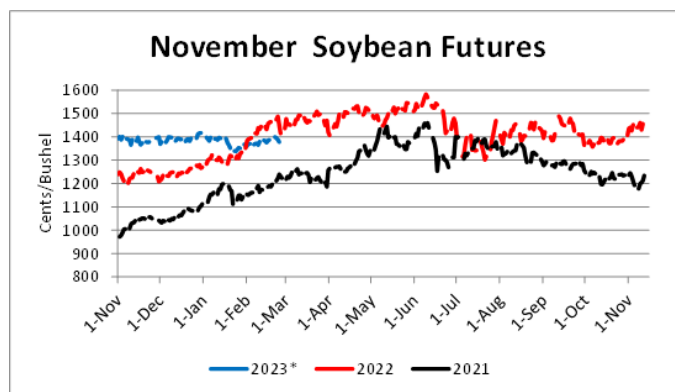
### Soybeans

Across Tennessee, average soybean basis weakened or remained unchanged at West, Northwest, West-Central, North-Central, and Mississippi River elevators and barge points. Basis ranged from even to 39 over, with an average basis of 22 over the March futures contract. Soybean net weekly sales reported by exporters were 20.0 million bushels for the 2022/23 marketing year and 0.4 million bushels for the 2023/24 marketing year. Exports for the same period were down 9% compared to last week at 63.9 million bushels. Soybean export sales and commitments were 90% of the USDA estimated total annual exports for the 2022/23 marketing year (September 1 to August 31), compared to the previous 5-year average of 84%. March 2023 soybean futures closed at \$15.29, up 2 cents since last Friday. For the week, March 2023 soybean futures traded between \$15.26 and \$15.54. Mar/May and Mar/Nov future spreads were -10 and -155 cents. May 2023 soybean futures closed at \$15.19, down 3 cents since last Friday.

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## Crop Comments by Dr. Aaron Smith

Soybeans	Mar 23	Change	Nov 23	Change
Price	\$15.29	\$0.02	\$13.74	-\$0.12
Support	\$15.14	-\$0.05	\$13.58	-\$0.21
Resistance	\$15.51	\$0.14	\$13.98	\$0.07
20 Day MA	\$15.29	\$0.07	\$13.75	\$0.09
50 Day MA	\$15.10	\$0.05	\$13.80	-\$0.01
100 Day MA	\$14.70	\$0.05	\$13.76	\$0.01
4-Week High	\$15.55	\$0.00	\$14.02	\$0.06
4-Week Low	\$14.78	\$0.00	\$13.30	\$0.00
Technical Trend	Up	=	Up	=

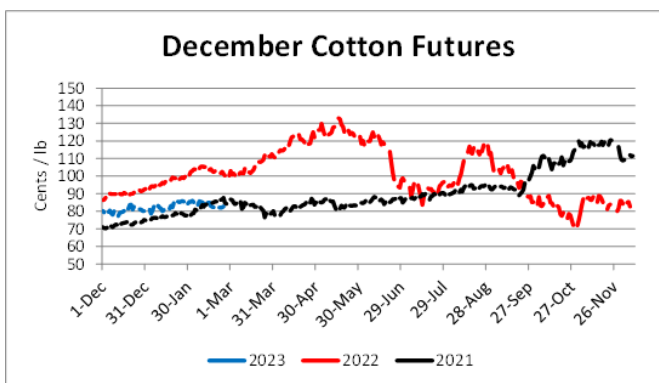


November 2023 soybean futures closed at \$13.74, down 12 cents since last Friday. New crop cash soybean prices at elevators and barge points ranged from \$13.56 to \$14.27. Downside price protection could be achieved by purchasing a \$13.80 November 2023 Put Option which would cost 76 cents and set a \$13.04 futures floor. Nov/Dec 2023 soybean-to-corn price ratio was 2.34 at the end of the week.

### Cotton

Delta upland cotton spot price quotes for February 23 were 81.66 cents/lb (41-4-34) and 83.91 cents/lb (31-3-35). Adjusted world price (AWP) was down 3.27 cents at 70.78 cents. Cotton net weekly sales reported by exporters were net sales of 425,300 bales for the 2022/23 marketing year – a marketing year high – and 11,900 bales for the 2023/24 marketing year. Exports for the same period were up 4% compared to last week at 193,600 bales. Upland cotton export sales were 92% of the USDA estimated total annual exports for the 2022/23 marketing year (August 1 to July 31), compared to the previous 5-year average of 91%. March 2023 cotton futures closed at 85.13 cents, up 4.88 cents since last Friday. For the week, March 2023 cotton futures traded between 79.8 and 85.13 cents. May 2023 cotton futures closed at 84.9 cents, up 3.4 cents since last Friday. Mar/May and Mar/Dec cotton futures spreads were -0.81 cents and -0.23 cents.

Cotton	Mar 23	Change	Dec 23	Change
Price	85.13	4.88	84.32	2.07
Support	80.96	2.04	81.04	0.22
Resistance	87.22	4.80	86.14	2.54
20 Day MA	84.32	-0.86	84.26	-0.57
50 Day MA	84.25	0.15	82.87	0.36
100 Day MA	83.00	-0.07	79.77	0.33
4-Week High	88.88	0.00	86.98	0.00
4-Week Low	79.80	-0.20	81.50	0.00
Technical Trend	Up	+	Up	+



December 2023 cotton futures closed at 84.32 cents, up 2.07 cents since last Friday. Downside price protection could be obtained by purchasing an 85 cent December 2023 Put Option costing 8.02 cents establishing a 76.98 cent futures floor.

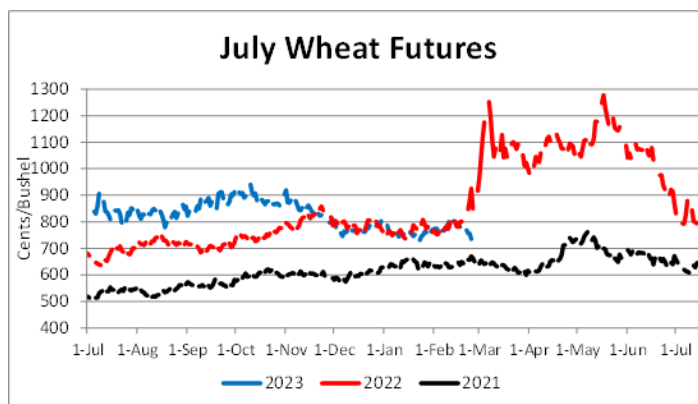
### Wheat

Wheat net weekly sales reported by exporters were 12.4 million bushels for the 2022/23 marketing year and 2.9 million bushels for the 2023/24 marketing year. Exports for the same period were down 32% compared to last week at 12.4 million bushels. Wheat export sales were 80% of the USDA estimated total annual exports for the 2022/23 marketing year (June 1 to May 31), compared to the previous 5-year average of 93%. Wheat cash prices at elevators and barge points ranged from \$6.86 to \$7.58. March 2023 wheat futures closed at \$7.08, down 57 cents since last Friday. March 2023 wheat futures traded between \$7.03

## Crop Comments by Dr. Aaron Smith

and \$7.73 this week. March wheat-to-corn price ratio was 1.09. May 2023 wheat futures closed at \$7.21, down 55 cents since last Friday. Mar/May and Mar/Jul future spreads were 13 and 21 cents.

Wheat	Mar 23	Change	Jul 23	Change
Price	\$7.08	-\$0.57	\$7.29	-\$0.52
Support	\$6.79	-\$0.74	\$7.03	-\$0.68
Resistance	\$7.55	-\$0.22	\$7.72	-\$0.18
20 Day MA	\$7.58	\$0.00	\$7.73	\$0.02
50 Day MA	\$7.54	-\$0.01	\$7.67	-\$0.01
100 Day MA	\$7.98	-\$0.07	\$8.09	-\$0.06
4-Week High	\$7.97	\$0.00	\$8.10	\$0.00
4-Week Low	\$7.03	-\$0.09	\$7.25	\$0.02
Technical Trend	Down	-	Down	-



New crop wheat cash prices at elevators and barge points ranged from \$7.16 to \$7.64. July 2023 wheat futures closed at \$7.29, down 52 cents since last Friday. Downside price protection could be obtained by purchasing a \$7.30 July 2023 Put Option costing 44 cents establishing a \$6.86 futures floor.

### 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](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\\_mbbl\\_w.htm](https://www.eia.gov/dnav/pet/pet_sum_sndw_a_EPOOXE_sae_mbbl_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/](https://www.nass.usda.gov/Statistics_by_State/Tennessee/Publications/)

[Crop Progress & Condition/](#)

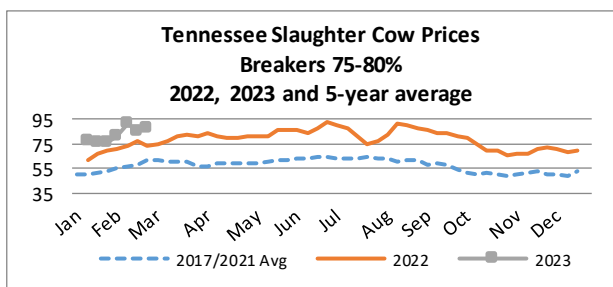
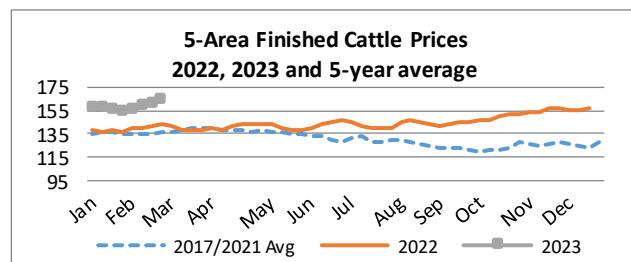
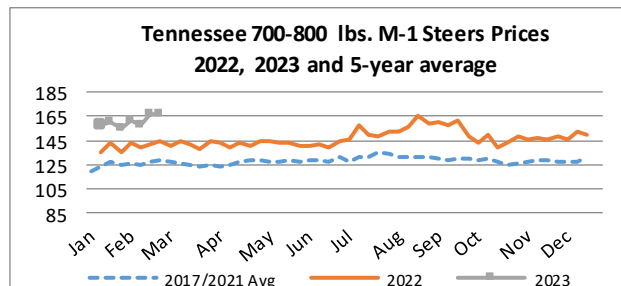
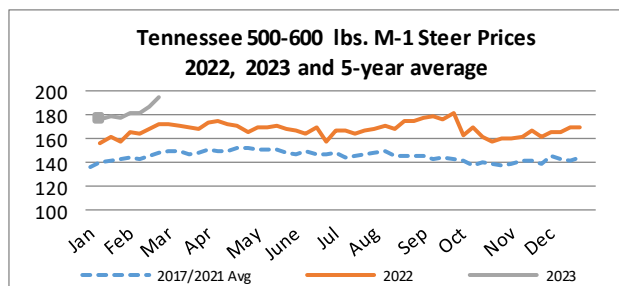
U.S. Crop Progress - <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1048>

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](mailto:aaron.smith@utk.edu).



Prices Paid to Farmers by Elevators					
Friday, February 17, 2023---Thursday, February 23, 2023					
	Friday Average	Monday Average	Tuesday Average	Wednesday Average	Thursday Average
<b>No. 2 Yellow Soybeans</b>	-----\$/bushel-----				
Northwest	15.27		15.49	15.40	15.34
North Central	15.42		15.64	15.55	15.49
West Central	15.57		15.79	15.70	15.64
West	15.66		15.88	15.77	15.71
Mississippi River	15.64		15.85	15.73	15.65
<b>Yellow Corn</b>					
Northwest	6.93		6.96	6.89	6.75
North Central	9.38		6.41	6.34	6.20
West Central	7.20		7.23	7.16	7.02
West	7.11		7.14	7.08	6.90
Mississippi River	7.02		7.05	6.98	6.84
<b>Wheat</b>					
Northwest	7.16		7.01	6.87	6.88
North Central	7.71		7.56	7.42	7.43
West					
Mississippi River	7.72		7.58	7.45	7.47
<b>Cotton</b>	-----\$/pound-----				
Memphis	81.00-83.25		81.03-83.28	81.38-83.63	81.66-83.91



## 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 Tuesday, February 21, 2023

	This Week			Last Week's	Year Ago
	Low	High	Weighted Average	Weighted Average	Weighted Average
-----\$/cwt-----					
<b>Steers: Medium/Large Frame #1-2</b>					
300-400 lbs.	190.00	250.00	222.51	212.71	195.50
400-500 lbs.	193.00	230.00	212.69	202.79	187.81
500-600 lbs.	171.00	215.00	195.03	186.85	171.97
600-700 lbs.	160.00	193.00	176.40	178.37	156.42
700-800 lbs.	150.00	182.00	166.75	166.70	144.78
<b>Steers: Small Frame #1-2</b>					
300-400 lbs.	---	---	---	179.57	163.75
400-500 lbs.	---	---	---	176.67	---
500-600 lbs.	---	---	---	155.30	---
600-700 lbs.	---	---	---	---	---
<b>Steers: Medium/Large Frame #3</b>					
300-400 lbs.	163.00	215.00	190.28	186.06	176.94
400-500 lbs.	160.00	207.50	185.22	181.32	168.57
500-600 lbs.	153.00	191.00	168.67	164.72	155.95
600-700 lbs.	150.00	170.00	157.17	162.76	139.78
700-800 lbs.	138.00	160.00	145.96	139.13	132.79
<b>Holstein Steers</b>					
300-400 lbs.	---	---	---	---	---
500-600 lbs.	---	---	---	---	---
700-800 lbs.	---	---	---	---	---
<b>Slaughter Cows &amp; Bulls</b>					
Breakers 75-80%	79.00	97.00	87.45	84.50	73.68
Boners 80-85%	76.00	91.00	84.36	82.71	71.91
Lean 85-90%	62.00	79.00	71.33	72.70	62.04
Bulls YG 1	95.00	117.00	107.39	106.09	99.01
<b>Heifers: Medium/Large Frame #1-2</b>					
300-400 lbs.	161.00	210.00	184.20	180.00	157.78
400-500 lbs.	155.00	202.50	175.13	170.02	153.83
500-600 lbs.	150.00	182.50	163.56	158.04	147.34
600-700 lbs.	135.00	173.00	154.31	148.98	137.22
<b>Heifers: Small Frame #1-2</b>					
300-400 lbs.	155.00	170.00	162.50	148.15	---
400-500 lbs.	---	---	---	143.38	127.77
500-600 lbs.	130.00	150.00	139.87	142.95	126.64
600-700 lbs.	---	---	---	---	---
<b>Heifers: Medium/Large Frame #2-3</b>					
300-400 lbs.	140.00	205.00	176.64	160.40	141.47
400-500 lbs.	142.50	180.00	162.37	152.39	138.91
500-600 lbs.	140.00	166.00	149.92	146.39	134.13
600-700 lbs.	130.00	156.00	139.51	137.90	127.36

### Cattle Receipts

This week:7,298

Week ago:7,252

Year ago:8,761

Link to report: [https://www.ams.usda.gov/mnreports/ams\\_2063.pdf](https://www.ams.usda.gov/mnreports/ams_2063.pdf)

## Graded Sales, Video Board Sales, Video Sales & Loads

## Graded Goat & Sheep Sales

### East Tennessee Livestock Center Graded Holstein Steer Sale

- Sweetwater, TN

2/17/2023

Total Receipts: 351

For complete report:

[https://www.ams.usda.gov/mnreports/ams\\_2072.pdf](https://www.ams.usda.gov/mnreports/ams_2072.pdf)

### Warren Co. Livestock Graded Sale - McMinnville, TN

2/20/2023

Total Receipts: 1,115

For complete report:

[https://www.ams.usda.gov/mnreports/ams\\_2079.pdf](https://www.ams.usda.gov/mnreports/ams_2079.pdf)

### Warren Co. Livestock Video Auction - McMinnville, TN

2/20/2023

Total Receipts: 365

For complete report:

[https://www.ams.usda.gov/mnreports/ams\\_3665.pdf](https://www.ams.usda.gov/mnreports/ams_3665.pdf)

## Department of Agricultural and Resource Economics

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