USDA Weekly Retail Turkey Feature Activity

Fri. Apr 03, 2009

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/03 thru 04/09.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

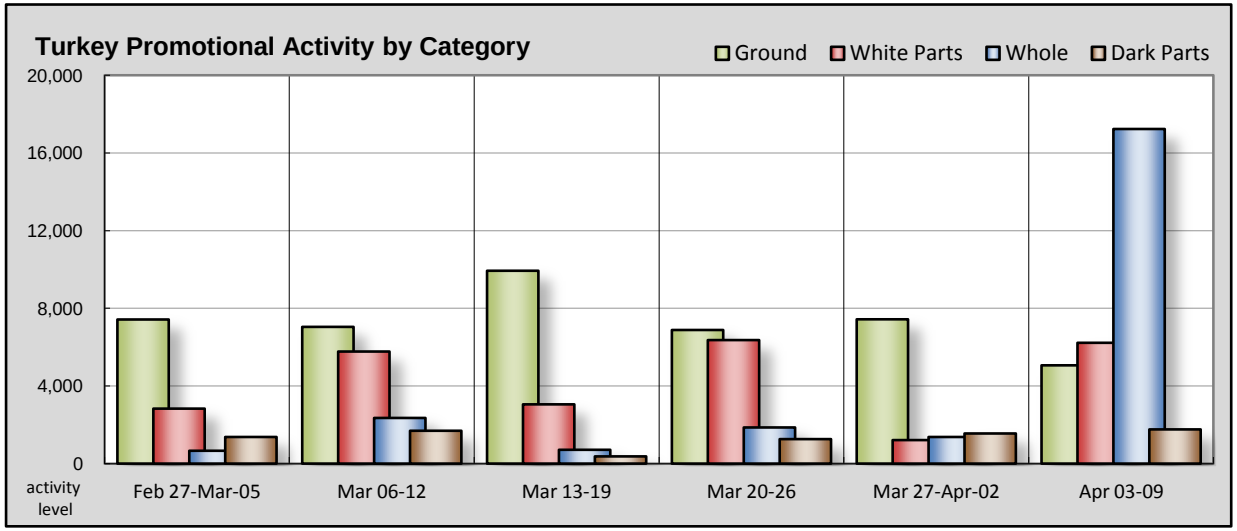
NATIONAL SUMMARY

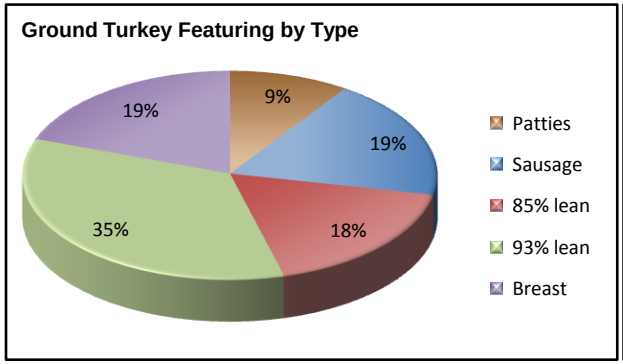
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	60.5% of 18,600 outlets		36.7% of 18,600 outlets		44.7% of 18,000 outlets	
Special Rate 4/	4.8%		3.5%		2.7%	
Activity Index 2/	30,810		13,400		11,460	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	4,120	1.29			160	1.61
" - Toms	3,550	1.26			110	1.61
Frozen - Hens	5,020	0.94	740	1.17	40	0.89
" - Toms	4,540	0.92	630	1.16		
PARTS:						
Breast:						
Bone-in, whole						
Fresh	870	2.59	10	2.39	270	2.29
Frozen	3,570	1.51	740	1.79	290	1.85
Hotel Style						
Fresh	290	1.04	30	1.89		
Frozen						
Split, bone-in						
Fresh			20	2.58	60	2.49
Rotisserie	240	7.10	220	7.63	590	7.30
Boneless, whole	80	3.99	50	4.20	80	3.99
Cutlets	350	5.08	80	4.39	690	3.98
Cutlets, thin sliced	240	5.21	10	4.59		
Strips	140	5.37	20	5.60	20	4.54
Tenders	440	4.77	30	4.39	110	3.94
Marinated Tenders	400	3.82	680	4.75	970	3.93
Drumsticks	280	1.30	700	1.52	110	1.39
Thighs	100	1.54	20	1.85		
Wings	200	1.24	700	1.51	130	1.41
Necks	20	1.69			60	1.29
Smoked Drumsticks	500	1.65	40	1.79	20	1.64
Smoked Wings	500	1.65	50	1.73	20	1.64
Smoked Necks	160	1.78	40	1.79	10	1.49
GROUND TURKEY:	**5,060**	**2.92**	**7,430**	**2.69**	**7,510**	**2.82**
Patties	480	2.49	650	2.46	880	2.93
Sausage	950	2.60	1,990	2.61	1,520	2.50
85% lean	890	1.95	1,130	2.17	1,460	1.85
93% lean	1,750	2.66	2,770	2.54	1,920	2.49
Breast	990	4.76	890	4.15	1,730	4.21
Rolls (frsh/frz 1 lb.)	140	1.40	1,160	1.15	210	1.25

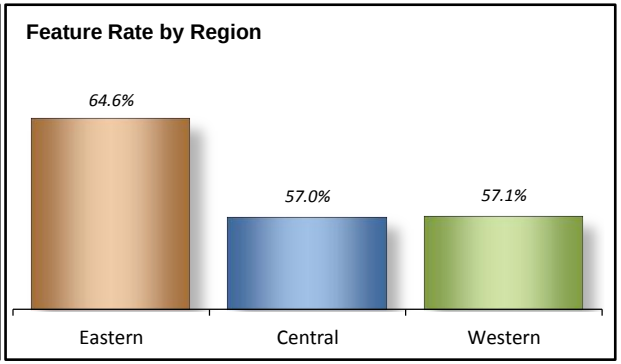
Note: rolls not included in ground fresh ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Supermarket advertising activity for turkey products is increasing dramatically across the country as the market enters the Easter/Passover demand season. Featuring of whole birds, a popular holiday choice, is offered to consumers as an alternative to mountains of ham with ad price levels slightly higher than those of last year's holiday and with most activity currently centered in the Eastern U.S. Whole bone-in breasts also enjoy increased promotion with the focus more on frozen offerings at reduced pricing. The rest of the white parts are seeing increased ad space and at higher ad pricing. A variety of dark parts are offered including a significant offering of smoked parts. Ground product continues to see good feature activity across all types on mostly higher ad prices. Turkey promotional activity can be expected to continue into next weekend, after which, it fades into the background until Thanksgiving.







All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)

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	EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME, NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)			CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN, MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)			WESTERN U.S. (AZ,CA,CO,ID,MT, NM,NV,OR,UT,WA,WY)		
Feature Rate [1/]	**64.6% of 8,400 sampled outlets**			**57.0% of 5,900 sampled outlets**			**57.1% of 4,300 sampled outlets**		
Special Rate [4/]	**2.1% of stores w/ no-price promotions**			**7.2% of stores w/ no-price promotions**			**7.0% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 21,600**			**Activity Index = 5,490**			**Activity Index = 3,580**		
	Price Range ($/pound)	Summary Stores	Wtd Avg	Price Range ($/pound)	Summary Stores	Wtd Avg	Price Range ($/pound)	Summary Stores	Wtd Avg
WHOLE BIRDS:									
Fresh - Hens	0.99 - 1.69	3,870	1.28	1.19 - 1.69	240	1.47	0.99 - 1.49	10	1.22
" - Toms	0.99 - 1.69	3,310	1.25	1.19 - 1.69	240	1.47			
Frozen - Hens	0.79 - 1.39	3,740	0.95	0.59 - 1.39	1,140	0.96	0.54	140	0.54
" - Toms	0.79 - 1.39	3,460	0.93	0.59 - 1.39	940	0.97	0.39	140	0.39
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.19 - 2.99	580	2.39	2.69 - 2.99	290	2.98			
Frozen	0.99 - 1.99	2,300	1.53	0.99 - 1.79	1,030	1.34	1.39 - 1.99	240	1.96
Hotel Style									
Fresh	0.97 - 1.99	290	1.04						
Frozen									
Split, bone-in									
Fresh									
Rotisserie	6.89 - 7.58	110	7.23				6.99	130	6.99
Boneless, whole	3.99	80	3.99						
Cutlets	2.99 - 3.99	80	3.81	5.45	200	5.45	5.45	70	5.45
Cutlets, thin sliced	4.99	100	4.99				4.54 - 5.45	140	5.37
Strips							4.54 - 5.45	140	5.37
Tenders	4.79	30	4.79	4.79	200	4.79	3.99 - 4.79	210	4.74
Marinated Tenders	4.26	180	4.26	3.19 - 4.26	170	3.53	2.39 - 3.72	50	3.25
Drumsticks	0.99 - 1.99	180	1.18	1.39 - 1.99	10	1.69	1.49	90	1.49
Thighs				1.99	10	1.99	1.49	90	1.49
Wings	0.99 - 1.99	190	1.21	1.39 - 1.99	10	1.69			
Necks	1.99	10	1.99	1.39	10	1.39			
Smoked Drumsticks	1.39 - 1.79	450	1.66	1.49	50	1.49			
Smoked Wings	1.39 - 1.79	450	1.66	1.49	50	1.49			
Smoked Necks	1.68 - 1.79	160	1.78						
GROUND TURKEY:									
Patties	1.99 - 2.69	290	2.41	2.50 - 3.00	40	2.70	2.49 - 3.50	150	2.59
Sausage	2.39 - 2.99	730	2.61	2.39 - 2.87	150	2.54	2.05 - 2.86	70	2.63
85% lean	1.59 - 2.30	200	1.92	1.66 - 2.29	250	1.72	1.99 - 2.29	440	2.09
93% lean	2.31 - 3.84	670	2.49	1.67 - 2.80	180	2.37	2.00 - 3.19	900	2.85
Breast (99-100% lean)	4.61 - 4.79	140	4.78	3.74 - 4.99	280	4.58	4.79 - 5.19	570	4.84
Rolls (frsh/frz 1 lb.)	1.00 - 2.59	30	1.97	1.00 - 2.09	80	1.35	0.99	30	0.99

A full breakdown of supermarket promotions featuring turkey and other poultry for Easter/Passover will be available on April 10, 2009 on our website at:

www.ams.usda.gov/pymarketnews.htm

"Poultry and Egg Market Reports"
"Holiday Advertising"

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, roaster chickens, capons, cornish hens, gizzards, livers, ducklings, geese, baking hens, shell eggs, and liquid eggs.

This and all of our other holiday promotions reports are also available in spreadsheet format. Please contact us at the number/e-mail address below to receive the spreadsheet files.

USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911 - PYMN@usda.gov