USDA Weekly Retail Turkey Feature Activity

Fri. Jul 31, 2009

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/31 thru 08/06.

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

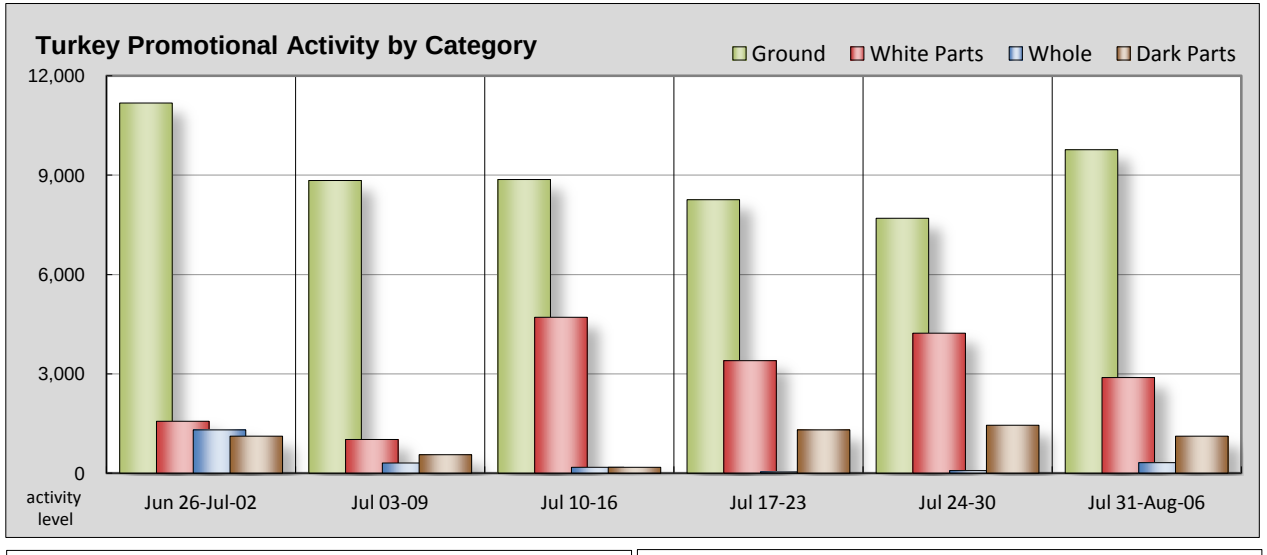
NATIONAL SUMMARY

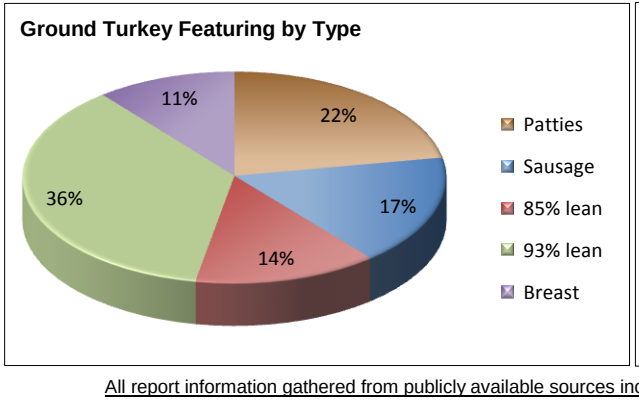
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	**52.6% of 18,600 outlets**		**43.1% of 18,600 outlets**		**43.8% of 18,000 outlets**	
Special Rate 4/	**8.9%**		**1.5%**		**3.9%**	
Activity Index 2/	**15,330**		**14,880**		**17,000**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens			10	1.37		
" - Toms			10	1.37		
Frozen - Hens	160	0.88	60	0.90		
" - Toms	160	0.88				
PARTS:						
Breast:						
Bone-in, whole						
Fresh	190	1.65	100	1.28	320	2.02
Frozen	1,570	1.33	1,510	1.34	760	1.52
Hotel Style						
Fresh	20	1.49				
Frozen						
Split, bone-in						
Fresh	160	2.73				
Rotisserie	360	7.34	480	8.07	740	8.68
Boneless, whole	50	4.43	50	4.03	410	3.84
Cutlets	390	4.65	780	4.54	2,090	4.25
Cutlets, thin sliced	100	4.99	270	4.92	820	4.29
Strips	10	5.45			380	3.95
Tenders	40	4.34	1,040	4.01	1,280	4.19
Marinated Tenders	950	4.00	970	4.22	270	3.82
Drumsticks	280	1.65	510	1.32	220	1.12
Thighs	80	1.83	110	1.35		
Wings	190	1.72	500	1.32	250	1.15
Necks	70	1.59	50	1.29	10	1.39
Smoked Drumsticks	250	1.69	150	1.51	30	1.40
Smoked Wings	250	1.69	130	1.55		
Smoked Necks						
GROUND TURKEY:	**9,770**	**2.78**	**7,700**	**2.95**	**9,220**	**2.92**
Patties	2,170	2.85	1,080	2.89	950	2.96
Sausage	1,640	2.74	2,050	2.65	2,340	2.65
85% lean	1,360	2.11	1,060	1.92	790	1.93
93% lean	3,540	2.56	1,850	2.67	3,440	2.56
Breast	1,060	4.31	1,660	4.32	1,700	4.47
Rolls (frsh/frz 1 lb.)	280	1.67	450	1.30	200	1.36

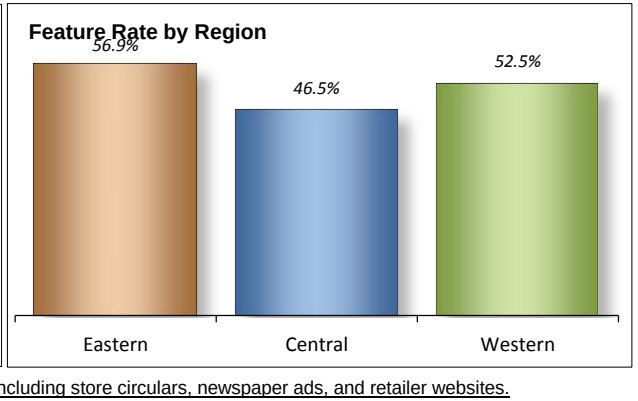
Note: rolls not included in ground fresh ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Turkey is popular this week and featured in over half the stores surveyed. "No price" promotions are active, encouraging consumers to buy one get one or to select from multiple items at a percent discount. Offers increase on fresh and frozen whole turkeys and ad prices trend lower. Bone-in breasts continue to be a popular summer item. Few stores offer rotisserie breasts; boneless white parts are also less available. Tenders almost disappear from the circulars this week and only the marinated tenders find much ad space. Dark parts are not as active and prices are less competitive. Ground turkey is widely promoted and provides an affordable option for dinner menus. The 93% lean and patties are the most popular and ad prices trend lower. This is the end of the month and school supplies are on the shopping list for many consumers. Money is tight and ground turkey will be a popular choice.







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/]	**56.9% of 8,400 sampled outlets**			**46.5% of 5,900 sampled outlets**			**52.5% of 4,300 sampled outlets**		
Special Rate [4/]	**5.3% of stores w/ no-price promotions**			**11.1% of stores w/ no-price promotions**			**12.9% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 7,430**			**Activity Index = 2,970**			**Activity Index = 4,650**		
	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens				0.88 - 0.99	160	0.88			
" - Toms				0.88 - 0.99	160	0.88			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.59	170	1.59	1.89	10	1.89	2.49	10	2.49
Frozen	1.29 - 1.59	1,300	1.32	0.99 - 1.69	220	1.41	1.00 - 1.49	50	1.29
Hotel Style									
Fresh	1.49	20	1.49						
Frozen									
Split, bone-in									
Fresh	1.49	20	1.49	1.89	10	1.89	2.99	130	2.99
Rotisserie	7.50 - 7.99	240	7.94	5.99 - 7.99	120	6.14			
Boneless, whole	2.99 - 4.99	50	4.43						
Cutlets	3.29 - 4.99	350	4.67	4.19	30	4.19	5.45	10	5.45
Cutlets, thin sliced	4.99	100	4.99						
Strips							5.45	10	5.45
Tenders				4.19	30	4.19	4.79	10	4.79
Marinated Tenders	3.49 - 4.53	660	4.12	3.14 - 3.73	260	3.71	3.99	30	3.99
Drumsticks	1.38 - 1.69	250	1.65	1.39 - 1.69	30	1.62			
Thighs	1.89	70	1.89	1.39	10	1.39			
Wings	1.38 - 1.89	170	1.74	1.39 - 1.69	20	1.56			
Necks	1.59	70	1.59						
Smoked Drumsticks	1.69	250	1.69						
Smoked Wings	1.69	250	1.69						
Smoked Necks									
GROUND TURKEY:									
Patties	2.50 - 3.50	420	2.96	1.99 - 2.50	410	2.42	2.49 - 3.00	1,340	2.95
Sausage	2.29 - 2.99	800	2.65	2.19 - 3.19	390	2.75	2.40 - 3.99	450	2.88
85% lean	1.66 - 2.49	760	1.91	1.67 - 2.30	30	1.95	2.39	570	2.39
93% lean	1.92 - 2.95	1,280	2.54	2.08 - 3.33	900	2.80	2.31 - 3.99	1,360	2.42
Breast (99-100% lean)	4.38 - 4.61	200	4.60	2.99 - 3.33	180	3.02	3.99 - 4.79	680	4.57
Rolls (frsh/frz 1 lb.)	0.99 - 1.19	40	1.12	1.49 - 2.00	240	1.76			