

## **USDA Weekly Retail Turkey Feature Activity**

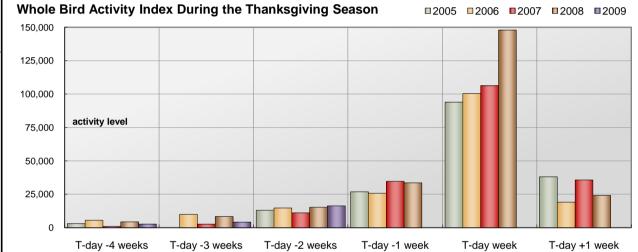
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/06 thru 11/12.

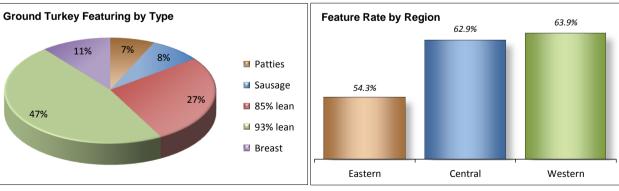
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY													
		WEEK		WEEK	LAST YEAR								
Feature Rate 1/		of 18,600 tlets		of 18,600 tlets	51.8% of 18,000 outlets 5.3%								
Special Rate 4/		.9%		.0%									
Activity Index 2/		,250		,760	28,980								
3/	Stores Wtd Avg		Stores Wtd Avg			Wtd Avg							
WHOLE BIRDS:													
Fresh - Hens	50	1.59			50	1.59							
" - Toms	50	1.59			50	1.59							
Frozen - Hens	8,190	0.74	2,030	0.88	7,620	0.71							
" - Toms	8,040	0.72	2,020	0.88	7,520	0.70							
PARTS:													
Breast:													
Bone-in, whole													
Fresh	40	2.14	150	2.08	40	2.14							
Frozen	1,720	1.38	1,690	1.39	1,420	1.94							
Hotel Style													
Fresh													
Frozen													
Split, bone-in													
Fresh			160	2.99	40	2.49							
Rotisserie	900	7.50	580	7.66	260	8.65							
Boneless, whole	240	3.76	720	4.27	160	4.32							
Cutlets	220	4.55	1,070	4.77	770	4.31							
Cutlets, thin sliced	10	4.99	720	4.68	300	5.33							
Strips			10	5.45	30	4.81							
Tenders	260	4.59	580	4.34	330	3.74							
Marinated Tenders	750	3.85	640	3.64	660	3.96							
Drumsticks	10	0.99	60	1.44	250	1.52							
Thighs	20	1.39	20	1.75	40	1.99							
Wings	40	1.44	60	1.40	210	1.49							
Necks	40	1.22	60	1.40									
Smoked Drumsticks	180	1.70	20	2.19	180	1.80							
Smoked Wings	160	2.00	20	2.19	180	1.80							
Smoked Necks	150	1.49	10	2.19									
<b>GROUND TURKEY:</b>	9,140	2.52	9,110	2.91	8,600	2.79							
Patties	630	2.09	320	2.81	620	3.35							
Sausage	730	2.72	2,450	2.61	1,940	2.87							
85% lean	2,490	2.06	1,580	2.07	960	1.86							
93% lean	4,300	2.49	2,480	2.52	4,250								
Breast	990	3.92	2,280	4.24	830	4.10							
Rolls (frsh/frz 1 lb.)	40		30	1.50	270	1.25							

This Week's Turkey Feature Highlights

Thanksgiving is only three weeks away and retailers are rolling out their holiday promotions. Offers on whole turkeys are more active than the same week a year ago. Prices are in a full range and many stores are offering free turkeys through purchase programs. Other stores are encouraging shoppers to order their fresh turkey now for pick-up closer to Thanksgiving. Frozen bone-in breasts are more active and average prices are similar to last week. Rotisserie ads increase and advertised prices trend lower. White meat cuts are less prominent this week, especially cutlets. Promotions increase on dark parts with the focus on smoked items this week. Ground turkey continues to be active; the weighted average price is sharply lower as grocers offer more lean grinds and less ground breast and sausage. Next week we'll see more even more whole turkeys offered as we get closer to the holiday.





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

Note: rolls not included in ground fresh ground turkey total and weighted average. (e.g., buy 1, get 1 free, etc.)



S USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/06 thru 11/12.

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

(риссо и	EASTERN U.S.			CENTRAL U.S.			WESTERN U.S.			
		_							A	
	(CT,DC,DE,FL,GA,MA,MD,M			(AL,AR,IA,IL,IN,KS,KY,LA,N			(AZ,CA,CO,ID,MT,			
1/	NC,NH,NJ,NY,PA,RI,SC,VA,	·	V		S,ND,NE, OH, OK,SD,TN,TX,WI)		NM,NV,OR,UT,WA,WY)			
Feature Rate 1/	54.3% of 8,400 sampled outlets			62.9% of 5,900 sampled outlets			63.9% of 4,300 sampled outlets			
Special Rate 4/	3.4% of stores w/ no-price promotions			5.2% of stores v			7.6% of stores w/ no-price promotions			
Activity Index 2/		ndex = 13,060		Activity Index = 10,290 Price Range Summary			Activity Index = 6,860			
	Price Range	Summ	ary Wtd Avg	ŭ l		•	Price Range	Summary		
WHOLE BIRDS:	(\$/pound)	Stores	vvta Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
Fresh - Hens	1.49 - 1.69	50	1.59							
" - Toms	1.49 - 1.69	50	1.59							
Frozen - Hens	0.47 - 1.49	3,350	0.75	0.45 - 1.59	2,720	0.85	0.38 - 0.88	2,120	0.57	
" - Toms	0.47 - 1.49	3,340	0.73	0.38 - 1.59	2,700	0.84	0.38 - 0.88	2,000	0.55	
PARTS:		3,0.0	00	0.00 1.00		0.0.	0.00	2,000	0.00	
Breast:										
Bone-in, whole										
Fresh	1.99 - 2.49	40	2.14							
Frozen	0.98 - 1.69	740	1.40	0.88 - 1.69	880	1.35	1.19 - 1.69	100	1.44	
Hotel Style										
Fresh										
Frozen										
Split, bone-in										
Fresh										
Rotisserie	5.99 - 8.99	340	7.07	6.99 - 8.99	290	7.55	7.99	270	7.99	
Boneless, whole	3.59 - 4.99	240	3.76							
Cutlets	2.59 - 4.99	220	4.55							
Cutlets, thin sliced				4.99	10	4.99				
Strips										
Tenders	4.49 - 4.79	100	4.64	2.99 - 4.59	30	3.55	4.79	130	4.79	
Marinated Tenders	3.73 - 4.79	290	4.35	3.19 - 4.26	390	3.59	3.19	70	3.19	
Drumsticks				0.99	10	0.99				
Thighs	1.39	20	1.39							
Wings	1.59	30	1.59	0.99	10	0.99				
Necks	1.29	30	1.29	0.99	10	0.99				
Smoked Drumsticks	1.59 - 1.69	170	1.67	2.19	10	2.19				
Smoked Wings	1.99	150	1.99	2.19	10	2.19				
Smoked Necks GROUND TURKEY:	1.49	150	1.49							
Patties	1.99 - 2.99	240	2.04	2.00	200	2.00	1.99 - 3.99	190	2.26	
Sausage	2.39 - 3.49	410	2.86	2.29 - 2.50	280	2.49	2.87 - 3.27	40	3.05	
85% lean	1.99 - 2.79	1,170	2.24	1.58 - 2.30	1,290	1.90	1.58	30	1.58	
93% lean	2.08 - 3.49	1,750	2.60	1.67 - 3.19	940	2.15	2.00 - 3.19	1,610	2.56	
Breast (99-100% lean)	3.00 - 4.49	180	3.76	3.33 - 4.99	510	4.27	2.79 - 4.23	300	3.43	
Rolls (frsh/frz 1 lb.)				1.00	10	1.00	1.00	30	1.00	

A full breakdown of supermarket promotions featuring turkey and other poultry for Thanksgiving will be available on November 25, 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, egg nog, and liquid egg products.

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@ams.usda.gov