USDA Weekly Retail Turkey Feature Activity

Fri. Nov 13, 2009

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/13 thru 11/19.

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

NATIONAL SUMMARY

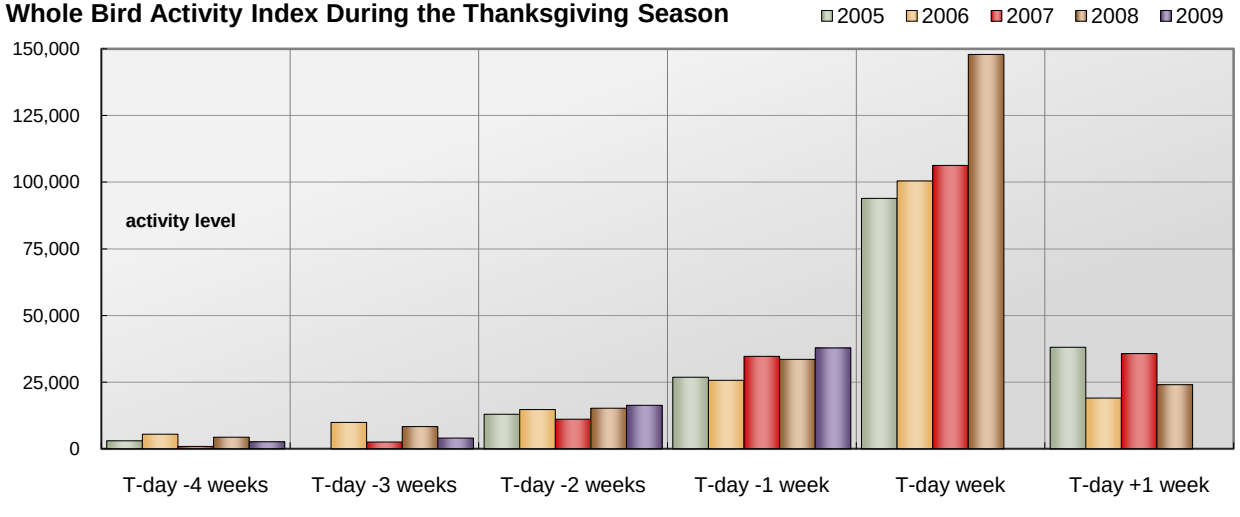
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	**78.5% of 18,600 outlets**		**59.3% of 18,600 outlets**		**63.2% of 18,000 outlets**	
Special Rate 4/	**11.2%**		**4.9%**		**9.1%**	
Activity Index 2/	**53,220**		**30,250**		**45,980**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens	2,690	1.21	50	1.59	3,020	1.36
" - Toms	2,910	1.22	50	1.59	3,010	1.36
Frozen - Hens	15,810	0.73	8,190	0.74	13,790	0.79
" - Toms	16,410	0.73	8,040	0.72	13,740	0.79
PARTS:						
Breast:						
Bone-in, whole						
Fresh	1,840	2.38	40	2.14	1,890	2.32
Frozen	4,460	1.64	1,720	1.38	3,240	2.13
Hotel Style						
Fresh					20	1.99
Frozen	20	1.99				
Split, bone-in						
Fresh						
Rotisserie	1,570	5.24	900	7.50	590	6.65
Boneless, whole	10	4.99	240	3.76	120	4.56
Cutlets	500	4.88	220	4.55	520	4.79
Cutlets, thin sliced			10	4.99	120	4.94
Strips	10	6.35				
Tenders	460	4.56	260	4.59	700	4.48
Marinated Tenders	660	4.96	750	3.85	170	4.08
Drumsticks	30	1.89	10	0.99		
Thighs			20	1.39		
Wings	30	1.89	40	1.44		
Necks			40	1.22		
Smoked Drumsticks	20	2.24	180	1.70	40	1.99
Smoked Wings	20	2.24	160	2.00		
Smoked Necks	10	2.19	150	1.49		
GROUND TURKEY:	**5,730**	**2.91**	**9,140**	**2.52**	**4,310**	**2.87**
Patties	700	2.70	630	2.09	80	3.14
Sausage	1,470	2.85	730	2.72	1,310	2.52
85% lean	840	2.10	2,490	2.06	520	2.00
93% lean	1,660	2.63	4,300	2.49	1,350	2.47
Breast	1,060	4.23	990	3.92	1,050	4.25
Rolls (frsh/frz 1 lb.)	30	1.50	40	1.00	700	1.40

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

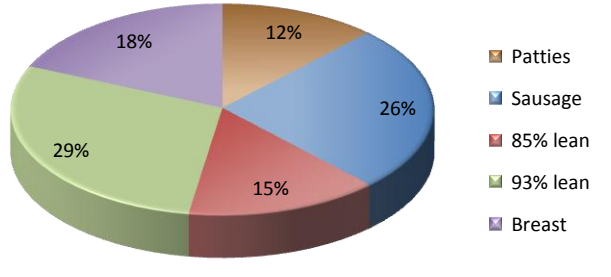
This Week's Turkey Feature Highlights

Feature activity is building as we head closer to Thanksgiving. Offers on frozen hens and toms are sharply higher this week and retailers are starting to show fresh birds. Compared to a year ago, average prices trend a few cents lower on frozen and are sharply lower on fresh. Over 16 percent of the stores surveyed offer purchased based promotions. More stores offer specialty turkeys ranging from organic to kosher. Bone-in breasts are a good choice for smaller families and there are plenty to be found; average prices trend sharply lower frozen, higher on fresh when compared to last year. Offers on rotisserie breasts are active for shoppers who can't wait until Thanksgiving to have turkey for dinner; prices are very attractive. Cutlets and tenders are more active; offers on dark parts retreat. Fewer stores offer ground turkey.

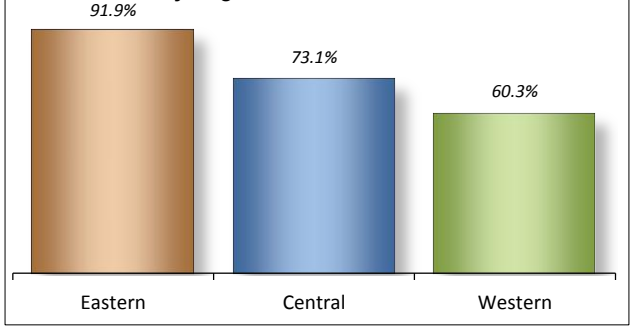
Whole Bird Activity Index During the Thanksgiving Season



Ground Turkey Featuring by Type



Feature Rate by Region



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.)

USDA Weekly Retail Turkey Feature Activity

Fri. Nov 13, 2009

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/13 thru 11/19.

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

	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/]	**91.9% of 8,400 sampled outlets**			**73.1% of 5,900 sampled outlets**			**60.3% of 4,300 sampled outlets**		
Special Rate [4/]	**6.3% of stores w/ no-price promotions**			**19.8% of stores w/ no-price promotions**			**9.0% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 30,240**			**Activity Index = 12,200**			**Activity Index = 10,750**		
	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	0.88 - 1.99	2,500	1.18	1.39 - 1.89	160	1.80	0.79	30	0.79
" - Toms	0.88 - 1.99	2,590	1.19	1.29 - 1.89	290	1.57	0.79	30	0.79
Frozen - Hens	0.28 - 1.49	8,440	0.73	0.33 - 1.39	4,360	0.77	0.33 - 1.29	3,010	0.69
" - Toms	0.28 - 1.69	8,760	0.73	0.33 - 1.39	4,640	0.77	0.23 - 1.29	3,010	0.64
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99 - 2.99	1,710	2.37	2.79	50	2.79	2.29	80	2.29
Frozen	0.99 - 2.99	2,310	1.59	0.99 - 1.99	1,440	1.56	1.69 - 1.99	710	1.94
Hotel Style									
Fresh									
Frozen	1.99	20	1.99						
Split, bone-in									
Fresh									
Rotisserie	4.99 - 5.00	210	5.00	3.99 - 5.00	140	4.91	5.00 - 7.99	1,220	5.32
Boneless, whole							4.99	10	4.99
Cutlets	3.99 - 6.35	70	4.98	4.54	120	4.54	4.99	310	4.99
Cutlets, thin sliced									
Strips	6.35	10	6.35						
Tenders	4.49 - 5.59	30	5.11	4.79	120	4.79	4.39 - 4.99	310	4.41
Marinated Tenders	3.73 - 4.26	240	4.04				5.49	420	5.49
Drumsticks	1.89	30	1.89						
Thighs									
Wings	1.89	30	1.89						
Necks									
Smoked Drumsticks	2.19	10	2.19	2.29	10	2.29			
Smoked Wings	2.19	10	2.19	2.29	10	2.29			
Smoked Necks	2.19	10	2.19						
GROUND TURKEY:									
Patties	1.64 - 3.99	440	2.19	2.00 - 3.99	110	3.67	3.27 - 3.50	150	3.47
Sausage	2.39 - 3.99	1,130	2.70	2.79 - 3.99	160	3.55	2.49 - 3.79	180	3.16
85% lean	1.60 - 2.99	640	2.22	1.60 - 2.30	200	1.70			
93% lean	1.88 - 3.00	710	2.41	2.31 - 2.91	200	2.61	2.39 - 3.19	750	2.83
Breast (99-100% lean)	3.30 - 4.61	340	3.90	3.99 - 4.99	190	4.37	4.39	530	4.39
Rolls (frsh/frz 1 lb.)				1.50	30	1.50			

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