USDA Weekly Retail Turkey Feature Activity

Fri. Jul 16, 2010

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/16 thru 07/22.

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

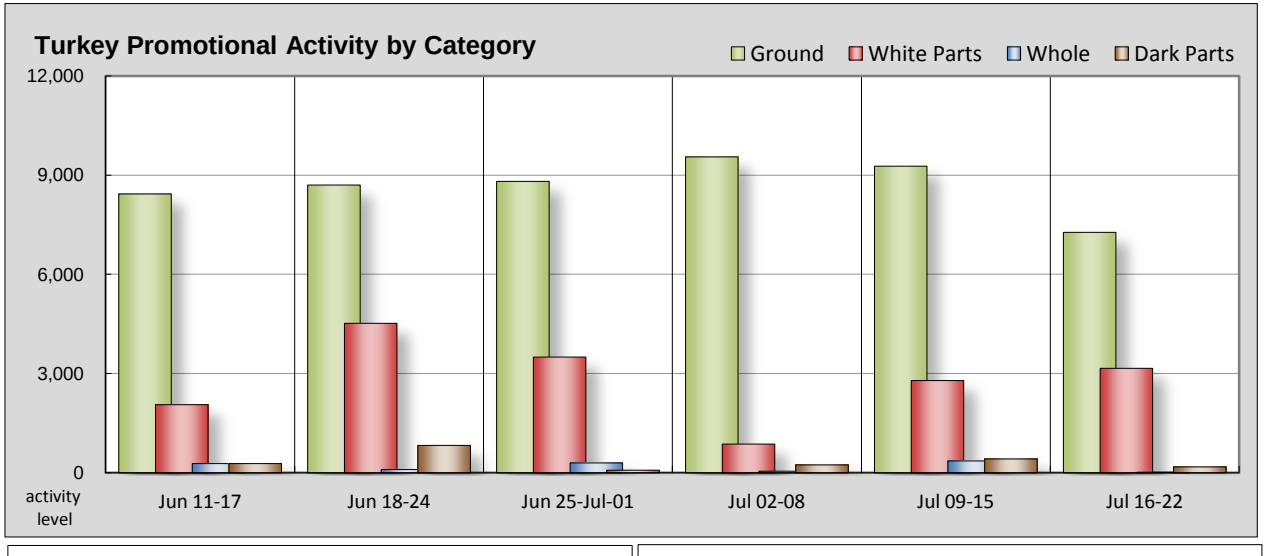
NATIONAL SUMMARY

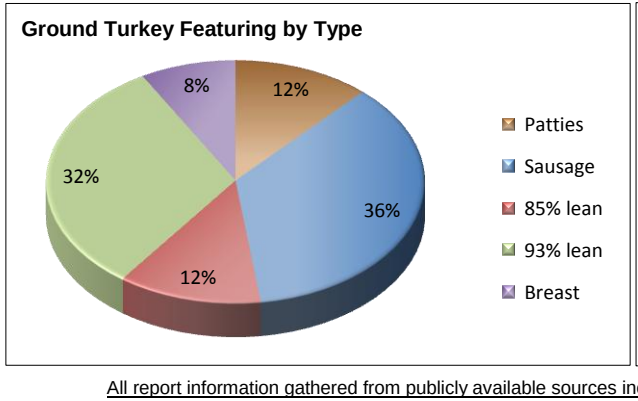
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	31.0% of 19,200 outlets		46.9% of 19,200 outlets		45.0% of 18,600 outlets	
Special Rate 4/	6.1%		4.1%		5.2%	
Activity Index 2/	10,990		14,750		13,680	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	10	1.59	10	1.29	20	1.44
" - Toms			10	1.29	10	1.49
Frozen - Hens	10	1.29	170	0.83	10	0.79
" - Toms			170	0.83		
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	1.99	10	2.28	40	1.66
Frozen	1,150	1.88	730	1.80	1,070	1.31
Hotel Style						
Fresh						
Frozen						
Split, bone-in						
Fresh	10	2.49	10	2.99	10	2.49
Rotisserie			600	8.32	150	7.12
Boneless, whole	160	4.90	40	4.74	210	4.54
Cutlets	1,230	4.47	730	4.72	1,060	4.77
Cutlets, thin sliced	320	4.99	150	4.79	10	4.59
Strips					10	5.45
Tenders	280	4.45	520	4.21	840	4.59
Marinated Tenders	270	3.94	1,660	4.09	620	3.84
Drumsticks	30	1.42	80	1.86	640	1.62
Thighs			40	2.19	10	1.59
Wings	10	1.49	290	1.56	640	1.63
Necks	10	0.79	10	1.39	20	1.49
Smoked Drumsticks	50	2.10				
Smoked Wings	60	2.08				
Smoked Necks	20	2.24				
GROUND TURKEY:	**7,270**	**2.74**	**9,270**	**2.99**	**8,260**	**2.80**
Patties	860	2.81	910	2.66	1,070	2.82
Sausage	2,620	2.73	2,040	2.59	850	2.77
85% lean	890	2.10	1,450	2.18	900	1.84
93% lean	2,300	2.57	2,490	2.71	4,120	2.39
Breast	600	4.20	2,380	4.24	1,320	4.72
Rolls (frsh/frz 1 lb.)	90	1.35	250	1.58	50	1.42

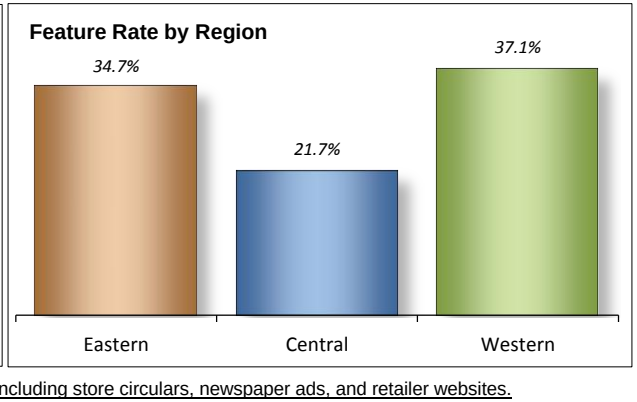
Note: rolls not included in ground fresh ground turkey total and weighted average.

This Week's Turkey Feature Highlights

This week, retailers are promoting less turkey, but those that are feature multiple turkey items. Whole turkeys are virtually unnoticed this week and, when shown, they are at higher price levels. Bone-in breasts increase in offers again at similar price levels to last week. Rotisserie breasts are non-existent. Cutlets are the most featured of the white parts at cheaper rates than last week; boneless breasts are more prevalent at higher levels; tenders appear less often with those that are marinated at slightly cheaper rates than the previous week. Smoked dark parts are visible this week and appear more frequently than fresh parts. Grinds continue to be heavily promoted but at a lower level than the previous week with 93% lean and sausage receiving the largest volume of circular space. The volume of sausage ads increase this week at higher levels, 93% is slightly less promoted and at lower price values. It is a good time to fire up the grill with summer heat upon us.







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/]	**34.7% of 8,400 sampled outlets**			**21.7% of 6,300 sampled outlets**			**37.1% of 4,500 sampled outlets**		
Special Rate [4/]	**2.1% of stores w/ no-price promotions**			**3.0% of stores w/ no-price promotions**			**17.8% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 6,580**			**Activity Index = 2,100**			**Activity Index = 2,310**		
	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	1.59	10	1.59						
" - Toms									
Frozen - Hens				1.29	10	1.29			
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh							1.99	10	1.99
Frozen	0.99 - 1.99	350	1.80	0.99 - 1.99	480	1.88	1.69 - 1.99	320	1.98
Hotel Style									
Fresh									
Frozen									
Split, bone-in									
Fresh	2.49	10	2.49						
Rotisserie									
Boneless, whole	3.59 - 4.99	150	4.90	4.99	10	4.99			
Cutlets	2.79 - 4.99	1,060	4.40	3.63 - 4.99	30	4.45	4.99	140	4.99
Cutlets, thin sliced	4.99	310	4.99	4.99	10	4.99			
Strips									
Tenders	4.79	30	4.79	3.19 - 4.99	50	4.15	4.39 - 4.66	200	4.47
Marinated Tenders	3.46 - 3.99	220	3.94				3.73 - 3.99	50	3.95
Drumsticks	1.79	10	1.79	0.99	10	0.99	1.49	10	1.49
Thighs									
Wings							1.49	10	1.49
Necks	0.79	10	0.79						
Smoked Drumsticks	1.99	10	1.99	1.59 - 2.49	30	2.01	2.49	10	2.49
Smoked Wings	1.99	20	1.99	1.59 - 2.49	30	2.01	2.49	10	2.49
Smoked Necks	1.99	10	1.99				2.49	10	2.49
GROUND TURKEY:									
Patties	2.39 - 2.99	490	2.70	2.50 - 3.00	130	2.96	2.69 - 2.99	240	2.98
Sausage	2.30 - 3.49	2,260	2.71	2.50 - 2.99	230	2.94	2.80	130	2.80
85% lean	2.00 - 2.69	300	2.45	1.66 - 2.30	280	1.85	1.99 - 2.00	310	2.00
93% lean	2.29 - 2.77	1,110	2.55	2.08 - 3.20	590	2.67	2.00 - 2.99	600	2.52
Breast (99-100% lean)	3.38 - 4.61	220	4.33	3.19 - 4.39	120	3.53	4.39	260	4.39
Rolls (frsh/frz 1 lb.)				0.99 - 1.50	90	1.35			

A full breakdown of supermarket promotions featuring turkey and other poultry for Easter/Passover will be available on April 02, 2010 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