USDA Weekly Retail Turkey Feature Activity

Fri. Dec 31, 2010

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/31 thru 01/06.

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

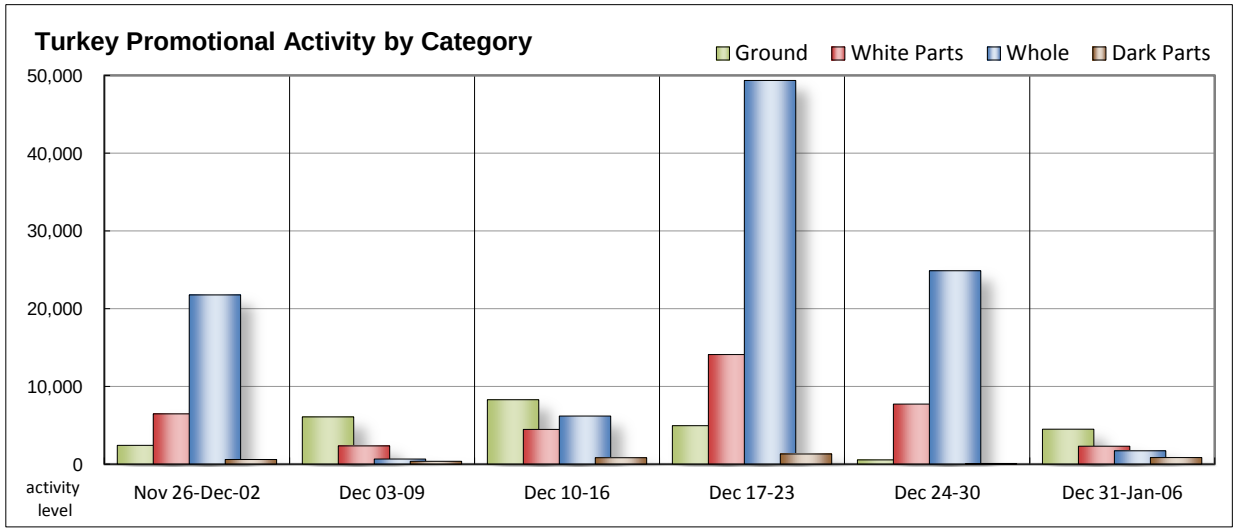
NATIONAL SUMMARY

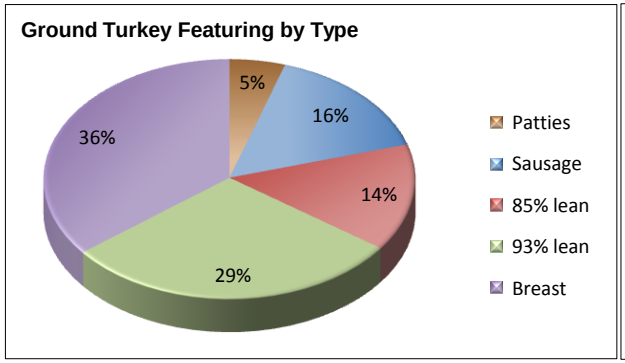
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	23.4% of 19,500 outlets		50.1% of 19,200 outlets		33.7% of 19,200 outlets	
Special Rate 4/	1.2%		1.7%		4.7%	
Activity Index 2/	10,210		33,320		8,240	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	200	1.45	7,270	1.43	40	1.25
" - Toms	170	1.44	7,220	1.43	40	1.25
Frozen - Hens	670	1.05	4,740	1.10	410	0.95
" - Toms	670	1.03	5,640	1.06	410	0.95
PARTS:						
Breast:						
Bone-in, whole						
Fresh	40	2.45	2,040	2.37	10	1.89
Frozen	210	1.86	2,740	1.53	620	1.68
Split, bone-in						
Fresh	100	4.26			10	1.89
Rotisserie	1,010	7.43	2,810	7.81	170	7.99
Boneless, whole	10	5.45			150	3.99
Cutlets	380	4.52	120	4.29	180	4.09
Cutlets, thin sliced			10	4.59	170	5.49
Strips					20	5.51
Tenders	550	4.55			50	3.46
Marinated Tenders	190	3.89	170	4.00	180	3.87
Drumsticks	170	1.67	10	1.39		
Thighs	10	1.89				
Wings	180	1.67	10	1.39		
Necks	10	1.29				
Smoked Drumsticks	160	2.31			20	1.94
Smoked Wings	160	2.31			10	2.19
Smoked Necks	150	2.31				
GROUND TURKEY:	**4,490**	**2.95**	**540**	**3.41**	**5,520**	**3.25**
Patties	220	3.01			400	2.97
Sausage	700	2.78	10	2.91	1,080	2.95
85% lean	650	2.11	140	2.31	670	2.24
93% lean	1,320	2.65	200	2.30	1,530	2.62
Breast	1,600	3.60	190	5.40	1,840	4.38
Rolls (frsh/frz 1 lb.)	480	1.61			230	1.63
Specialty 5/						
Patties						
93-94% lean	10	3.49	140	3.49		
Breast	190	5.08				

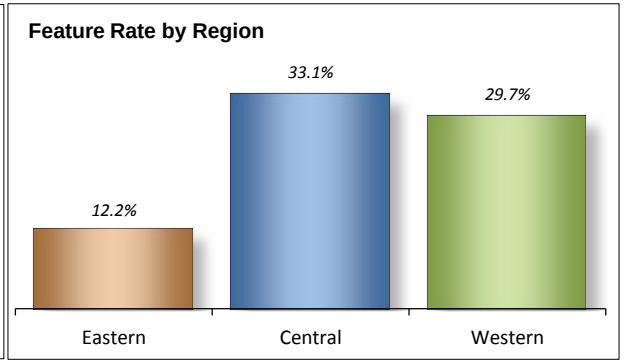
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail activity on bone-in, boneless, and ground turkey is seasonally light; deli is more active this week. Few stores offer whole turkeys now that we are leaving the holiday season. Offers are light on fresh and frozen bone-in breasts and prices trend higher. Rotisserie breasts are still popular, but not as heavily promoted this week. Boneless white parts are inching back into the circulars; cutlets and tenders are the main items offered. Dark parts are fully represented, and are quite a bit more popular this week. Ground items are active; the weighted average price is lower. Promotions are most active on ground breast and 93% lean, good choices for health conscious consumers. There are some very attractive prices on ground breast, prices trend higher on 93% lean. The service deli is busy this week, particularly in the east, both in fresh sliced and in prepared deli trays for New Year's gatherings. Self-service deli meat is more common in the western two-thirds of the nation.







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.) **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/31 thru 01/06.

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

Fri. Dec 31, 2010

	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/]	**12.2% of 8,400 sampled outlets**			**33.1% of 6,400 sampled outlets**			**29.7% of 4,700 sampled outlets**		
Special Rate [4/]	**2.3% of stores w/ no-price promotions**			**0.4% of stores w/ no-price promotions**			**0.3% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 5,140**			**Activity Index = 2,380**			**Activity Index = 2,490**		
	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	1.29 - 1.59	160	1.43	1.39 - 1.79	40	1.52			
" - Toms	1.29 - 1.49	140	1.42	1.49	30	1.49			
Frozen - Hens	0.88 - 1.29	160	1.24	0.79 - 1.29	270	0.98	1.00	240	1.00
" - Toms	0.88 - 1.29	160	1.24	0.79 - 1.29	270	0.94	1.00	240	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69 - 2.79	20	2.76	1.99 - 2.40	20	2.14			
Frozen	1.99	130	1.99	1.49 - 1.99	80	1.66			
Split, bone-in									
Fresh	3.99 - 4.49	90	4.41	2.89	10	2.89			
Rotisserie	6.99 - 8.99	720	7.20	8.99	10	8.99	6.99 - 8.99	280	7.95
Boneless, whole							5.45	10	5.45
Cutlets	3.49 - 5.49	370	4.53	2.68 - 5.49	10	3.88			
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.99	340	4.90				3.99	210	3.99
Marinated Tenders	3.73 - 4.26	140	3.76	4.26	50	4.26			
Drumsticks	1.29	20	1.29	1.29 - 1.49	20	1.38	1.78	130	1.78
Thighs				1.89	10	1.89			
Wings	1.39	20	1.39	1.29 - 1.49	30	1.36	1.78	130	1.78
Necks				1.29	10	1.29			
Smoked Drumsticks				1.69 - 2.40	30	1.98	2.38	130	2.38
Smoked Wings				1.69 - 2.40	30	1.98	2.38	130	2.38
Smoked Necks				1.69 - 2.00	20	1.89	2.38	130	2.38
GROUND TURKEY:									
Patties	2.99 - 3.99	20	3.47	1.68 - 3.99	200	2.97			
Sausage	2.39 - 2.95	560	2.73	2.73 - 2.99	40	2.87	3.00	100	3.00
85% lean	2.16 - 2.49	170	2.44	1.69 - 2.00	260	1.99	1.98 - 1.99	220	1.99
93% lean	2.49 - 3.84	610	2.86	2.00 - 2.55	450	2.31	2.39 - 3.19	260	2.77
Breast (99-100% lean)	2.29 - 5.38	1,250	3.31	4.79	70	4.79	4.61	280	4.61
Rolls (frsh/frz 1 lb.)	1.99	60	1.99	1.25 - 1.99	420	1.56			
Specialty [5/]									
Patties									
93-94% lean				3.49	10	3.49			
Breast	4.99 - 5.99	170	5.09	5.00	20	5.00			

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Dec 31, 2010

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/31 thru 01/06.

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

	NATIONAL SUMMARY				EASTERN U.S.			CENTRAL U.S.			WESTERN U.S.		
	This Week		Last Week		(CT,DC,DE,FL,GA,MA,MD,ME, NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)			(AL,AR,IA,IL,IN,KS,KY,LA,MI,MN, MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)			(AZ,CA,CO,ID,MT, NM,NV,OR,UT,WA,WY)		
Feature Rate 1/	73.0% of 19,500 stores		40.3% of 19,200 stores		81.8% of 8,400 sampled outlets			65.5% of 6,400 sampled outlets			67.6% of 4,700 sampled outlets		
Activity Index 2/	40,500		19,210		Activity Index = 21,500			Activity Index = 11,590			Activity Index = 7,410		
	Stores	Wtd Avg	Stores	Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey													
Category 1													
Processor Brand	4,840	7.13	2,160	7.49	4.99 - 8.99	3,080	7.09	5.98 - 9.99	810	7.12	6.99 - 11.99	950	7.27
Private Brand	3,210	7.42	380	7.10	6.99 - 7.99	2,970	7.46	6.59 - 6.99	230	6.92	7.99	10	7.99
Category 2													
Processor Brand	2,880	5.40	3,550	5.93	3.99 - 5.99	1,100	5.22	4.19 - 6.99	1,180	5.46	4.29 - 5.99	600	5.62
Private Brand	3,850	5.72	2,080	6.44	3.99 - 6.99	1,000	5.73	3.99 - 6.99	1,470	5.72	4.99 - 6.99	1,380	5.72
Category 3													
Processor Brand	1,130	4.38	990	4.23	2.69 - 4.99	750	4.59	3.97 - 3.99	360	3.99	3.97	20	3.97
Private Brand	250	4.44	190	4.10	3.99	40	3.99	3.99 - 4.99	210	4.53			
Turkey Ham													
Processor Brand	330	3.03	230	3.35	2.69 - 3.99	100	3.80	2.88 - 3.99	40	3.20	2.49 - 2.96	190	2.59
Private Brand													
Turkey Pastrami													
Processor Brand	450	3.45	110	4.10	2.28 - 4.49	90	3.65	2.98 - 3.99	40	3.60	2.49 - 3.49	320	3.37
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,790	7.32	1,180	7.71	4.99 - 8.99	2,620	7.53	5.98 - 8.99	890	6.81	6.99	280	6.99
Private Brand	160	6.71	700	6.41	6.49 - 6.99	90	6.88	6.49	70	6.49			
Category 2													
Processor Brand	160	4.95	790	6.69				4.49 - 4.99	140	4.94	4.97	20	4.97
Private Brand			210	5.99									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	7,620	2.96	1,400	3.20	2.19 - 3.99	4,340	2.86	2.50 - 3.99	2,590	3.15	1.99 - 4.29	690	2.85
Private Brand	1,690	3.24	2,170	2.77	3.33 - 3.50	390	3.48	2.50 - 3.50	650	3.34	2.99 - 3.00	650	2.99
Turkey 16 oz													
Processor Brand	1,400	4.99	430	4.06	4.99	170	4.99	3.98 - 5.99	130	5.19	3.49 - 4.99	1,100	4.97
Private Brand	120	2.88									2.88	120	2.88
Chicken 7-10 oz													
Processor Brand	6,820	2.99	990	3.17	2.19 - 3.99	4,370	2.86	2.50 - 3.99	2,020	3.19	2.79 - 4.29	430	3.36
Private Brand	1,800	3.25	1,650	2.74	3.33 - 3.50	390	3.48	2.50 - 3.50	760	3.36	2.99 - 3.00	650	2.99

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)