



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/21 thru 01/27.

Fri. Jan 21, 2011

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

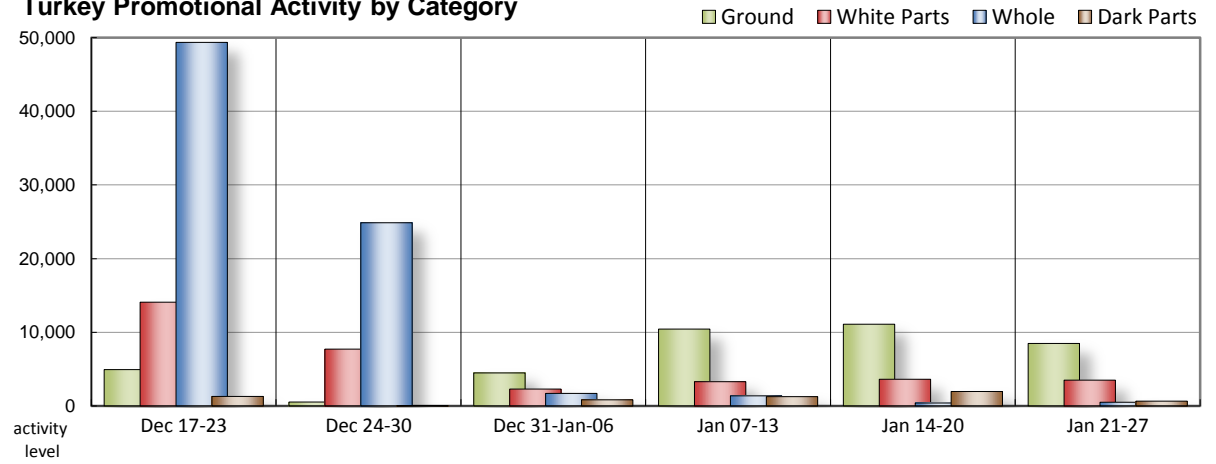
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	43.6% of 19,500 outlets		47.9% of 19,500 outlets		45.3% of 19,200 outlets	
Special Rate ^{4/}	9.5%		2.1%		4.4%	
Activity Index ^{2/}	15,260		18,770		13,140	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	250	0.99	270	1.29	720	0.89
" - Toms	260	1.00	140	1.29	710	0.89
PARTS:						
Breast:						
Bone-in, whole						
Fresh	110	2.07	50	2.26	170	2.04
Frozen	830	1.74	940	1.51	1,330	1.14
Split, bone-in						
Fresh			190	2.46	60	2.49
Rotisserie	330	7.83	1,300	7.65	230	7.84
Boneless, whole						
Cutlets	1,330	4.75	550	4.36	580	5.01
Cutlets, thin sliced	140	5.49	230	4.49	10	4.99
Strips	20	3.99			10	5.54
Tenders	550	4.47	90	4.56	370	4.50
Marinated Tenders	1,400	4.08	870	4.01	70	3.87
Drumsticks						
Thighs	120	1.56	870	1.42	330	1.46
Wings	130	1.55	880	1.48	280	1.48
Necks			20	1.25	160	1.39
Smoked Drumsticks	200	2.59	20	2.39	150	1.79
Smoked Wings	70	2.05			170	1.98
Smoked Necks	140	1.99			150	1.59
GROUND TURKEY:						
Patties	550	2.87	640	2.93	490	2.96
Sausage	1,300	2.85	1,740	2.85	1,470	2.90
85% lean	2,020	2.17	3,840	2.22	830	1.95
93% lean	2,290	2.68	3,490	2.54	3,280	2.35
Breast	2,330	4.27	1,390	3.99	930	4.30
Rolls (frsh/frz 1 lb.)	450	1.51	480	1.14	220	1.16
Specialty ^{5/}						
Patties					20	3.59
93-94% lean	190	3.86	140	3.49	120	3.50
Breast	50	5.99			240	6.55

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

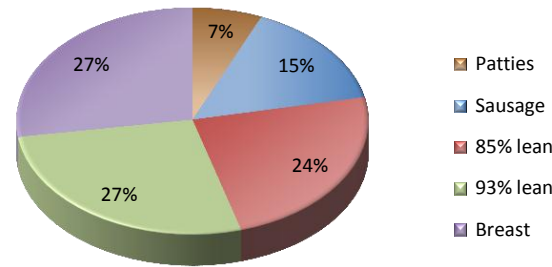
This Week's Turkey Feature Highlights

Retail activity slows on most categories but increases on the poultry deli meats. Promotions on frozen whole turkeys increase; prices are sharply lower. Offers on bone-in breasts are about the same volume as last week. Fresh bone-in breasts prices trend lower; frozen prices trend higher. Offers on rotisserie breasts slow this week. As an alternative, activity is sharply higher on cutlets, tenders and marinated tenders. Prices are much higher on cutlets, lower on tenders, slightly higher on marinated tenders. Offers on dark meat slow after last week's very active levels. This week there are plenty of ads promoting grinds, just not as many as last week. Promotions are fairly evenly spread between 85%, 93% and ground breast. Deli meats are highly visible in the circulars. Prices are trending higher on most service deli turkey items. Self-service is more active for turkey, less active for chicken.

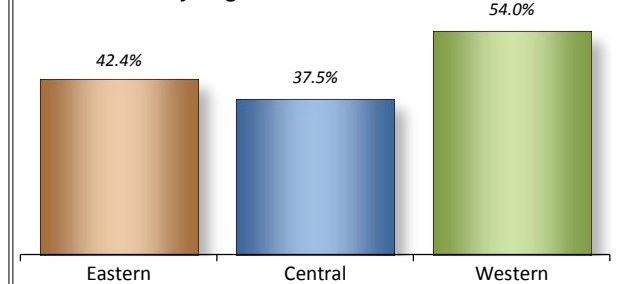
Turkey Promotional Activity by Category



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



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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/} Special Rate ^{4/} Activity Index ^{2/}	42.4% of 8,400 sampled outlets 8.0% of stores w/ no-price promotions Activity Index = 8,060			37.5% of 6,400 sampled outlets 14.5% of stores w/ no-price promotions Activity Index = 3,770			54.0% of 4,700 sampled outlets 5.4% of stores w/ no-price promotions Activity Index = 3,190		
	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									
" - Toms									
Frozen - Hens	0.99	20	0.99	0.99	230	0.99			
" - Toms	0.99	20	0.99	0.99 - 1.29	240	1.00			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.89	10	2.89	1.99	100	1.99			
Frozen	1.39 - 1.69	320	1.54	0.99 - 1.99	350	1.83	1.48 - 1.99	160	1.96
Split, bone-in									
Fresh									
Rotisserie	5.99 - 7.99	310	7.69	9.99	20	9.99			
Boneless, whole	3.29 - 5.49	180	4.26	2.69 - 3.99	20	3.23			
Cutlets	3.29 - 5.49	1,330	4.75						
Cutlets, thin sliced	5.49	140	5.49						
Strips	3.99	20	3.99						
Tenders	3.42 - 4.99	540	4.47	4.79	10	4.79			
Marinated Tenders	3.19 - 4.79	520	4.34	2.66 - 5.33	460	4.79	2.66 - 3.19	420	2.99
Drumsticks	1.39 - 1.69	100	1.58	1.39	10	1.39	1.49	10	1.49
Thighs									
Wings	1.39 - 1.69	110	1.57	1.39	10	1.39	1.49	10	1.49
Necks									
Smoked Drumsticks	1.99 - 2.78	70	2.10	2.39	10	2.39	2.89	120	2.89
Smoked Wings	1.99	60	1.99	2.39	10	2.39			
Smoked Necks	1.99	140	1.99						
GROUND TURKEY:									
Patties	2.50 - 2.99	220	2.95	2.49 - 3.00	20	2.71	2.50 - 3.50	310	2.82
Sausage	1.99 - 3.21	990	2.87	2.39 - 2.79	130	2.45	2.69 - 3.50	180	3.06
85% lean	1.75 - 2.39	900	2.22	1.65 - 2.40	680	2.08	1.58 - 2.80	440	2.21
93% lean	2.33 - 3.84	1,140	2.73	2.49 - 2.99	490	2.59	1.84 - 3.29	660	2.68
Breast (99-100% lean)	3.84 - 4.95	650	4.49	3.33 - 4.99	820	4.23	3.99 - 5.69	860	4.14
Rolls (frsh/frz 1 lb.)	1.00 - 2.49	270	1.43	0.99 - 2.99	160	1.61	1.69	20	1.69
Specialty ^{3/}									
Patties									
93-94% lean	3.89 - 4.99	170	3.92	3.33	20	3.33			
Breast	5.99	20	5.99				5.99	30	5.99



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats
 Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/21 thru 01/27.
 (prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

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Feature Rate ^{1/}	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)			
	82.4% of 19,500 stores		76.9% of 19,500 stores		85.9% of 8,400 sampled outlets				81.2% of 6,400 sampled outlets				77.8% of 4,700 sampled outlets			
Activity Index ^{2/}	54,690		52,790		Activity Index = 29,160				Activity Index = 12,450				Activity Index = 13,080			
	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary (Stores Wtd Avg)		Price Range (\$/pound)	Summary (Stores Wtd Avg)		Price Range (\$/pound)	Summary (Stores Wtd Avg)				
SERVICE DELI - Turkey																
Category 1																
Processor Brand	6,030	7.81	5,190	7.45	5.49 - 9.99	5,230	7.88	5.99 - 8.99	730	7.19	7.99 - 12.90	70	8.99			
Private Brand	2,080	7.68	2,730	7.18	6.99 - 7.99	1,710	7.74	6.99 - 7.99	370	7.41						
Category 2																
Processor Brand	6,560	6.09	4,220	5.95	4.97 - 7.99	2,790	6.39	3.97 - 6.99	1,710	5.52	3.97 - 6.99	2,060	6.16			
Private Brand	4,640	6.44	4,960	6.27	4.48 - 6.99	3,410	6.47	4.99 - 6.58	730	6.04	5.99 - 7.99	500	6.84			
Category 3																
Processor Brand	1,620	4.34	1,370	4.09	3.98 - 4.99	930	4.45	2.98 - 4.99	320	4.33	2.29 - 5.99	370	4.09			
Private Brand	1,370	5.25	10	3.98	1.99	10	1.99	2.98	20	2.98	4.99 - 5.99	1,340	5.31			
Turkey Ham																
Processor Brand	540	3.46	290	2.94	2.98 - 3.99	360	3.84	1.99 - 2.99	50	2.85	2.29 - 2.79	130	2.65			
Private Brand	30	3.64	20	3.79	3.49 - 3.79	30	3.64									
Turkey Pastrami																
Processor Brand	150	3.69	680	4.00	3.49 - 3.99	110	3.95	2.99	40	2.99						
Private Brand																
SERVICE DELI - Chicken																
Category 1																
Processor Brand	3,360	6.67	4,050	7.38	4.99 - 8.99	1,110	7.27	4.97 - 7.99	1,160	6.15	4.97 - 8.99	1,090	6.61			
Private Brand	740	6.63	2,030	6.68	5.99 - 6.99	450	6.72	5.99 - 7.49	290	6.48						
Category 2																
Processor Brand	560	5.75	180	5.49	3.00 - 6.49	260	5.53	4.58 - 6.98	300	5.95						
Private Brand	140	5.99	730	6.05				5.99	140	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)																
Turkey 7-10 oz																
Processor Brand	10,430	2.98	11,910	2.98	1.75 - 3.99	4,610	3.00	1.99 - 3.99	2,740	2.83	2.50 - 3.99	3,080	3.08			
Private Brand	2,330	3.14	1,750	3.01	2.79 - 3.50	1,270	3.15	2.50 - 3.50	680	3.32	2.50 - 3.00	380	2.78			
Turkey 16 oz																
Processor Brand	2,370	5.09	630	4.36	3.00 - 6.99	1,470	5.01	3.29 - 5.48	500	4.67	3.29 - 6.99	400	5.92			
Private Brand	900	3.56	140	5.99	3.00 - 3.99	240	3.45	3.49	120	3.49	3.29 - 3.99	540	3.62			
Chicken 7-10 oz																
Processor Brand	8,540	2.99	10,190	3.01	1.75 - 3.99	3,900	2.98	2.00 - 3.99	1,900	2.93	2.50 - 3.99	2,740	3.04			
Private Brand	2,300	3.13	1,710	3.02	2.79 - 3.50	1,270	3.15	2.50 - 3.50	650	3.31	2.50 - 3.00	380	2.78			

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)

Source: USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911

website: www.ams.usda.gov/pymarketnews.htm