USDA Weekly Retail Turkey Feature Activity

Fri. Feb 25, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/25 thru 03/03.

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

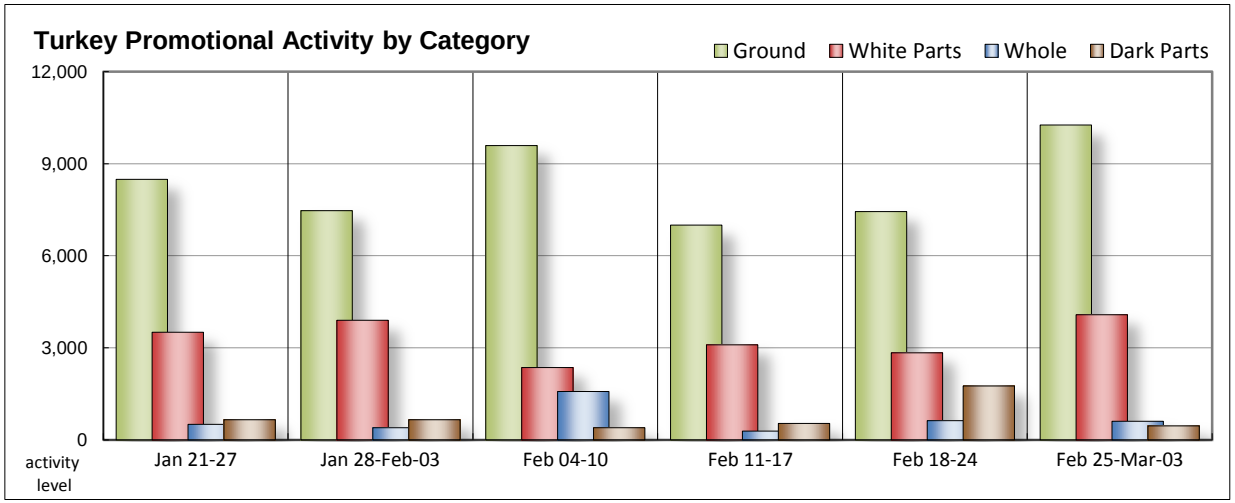
NATIONAL SUMMARY

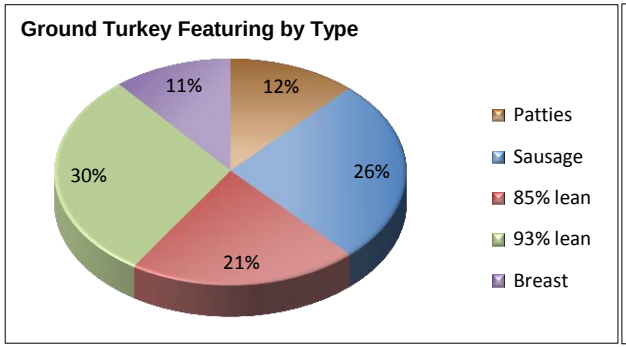
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**49.8% of 19,500 outlets**		**56.8% of 19,500 outlets**		**60.9% of 19,200 outlets**	
Special Rate [4/]	**1.7%**		**2.4%**		**7.9%**	
Activity Index [2/]	**17,190**		**15,660**		**20,460**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	350	1.05	240	0.74	700	0.87
" - Toms	260	0.86	390	0.81	770	0.86
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	1.99	30	2.26	260	1.88
Frozen	1,750	1.85	570	1.66	1,150	1.33
Split, bone-in						
Fresh	180	2.49	20	2.47	10	1.88
Rotisserie	1,150	7.27	990	7.94	720	8.15
Boneless, whole	230	4.61			20	4.49
Cutlets	310	4.73	730	4.87	950	4.58
Cutlets, thin sliced	20	4.99	20	3.99	80	4.54
Strips	130	4.99				
Tenders	300	4.60	480	4.67	130	4.54
Marinated Tenders	1,010	3.87	2,620	3.82	390	4.01
Drumsticks	180	1.21	380	1.53	250	1.42
Thighs	10	2.49	260	1.73	120	1.44
Wings	190	1.20	520	1.71	240	1.42
Necks	60	1.05	20	1.55	40	0.78
Smoked Drumsticks	10	2.98	340	2.43	60	1.77
Smoked Wings	10	1.69	40	1.88	60	1.99
Smoked Necks			200	2.03	20	1.69
GROUND TURKEY:	**10,260**	**2.89**	**7,440**	**2.93**	**13,940**	**2.73**
Patties	1,220	2.99	720	2.73	1,410	2.85
Sausage	2,700	2.96	1,960	2.65	3,730	2.86
85% lean	2,150	2.23	1,190	2.13	3,990	2.06
93% lean	3,060	2.74	2,430	2.82	2,740	2.42
Breast	1,130	4.24	1,140	4.61	2,070	4.09
Rolls (frsh/frz 1 lb.)	430	1.10	330	1.94	550	1.50
Specialty [5/]						
Patties						
93-94% lean	330	4.62	140	3.49	20	2.30
Breast	10	4.59			170	3.99

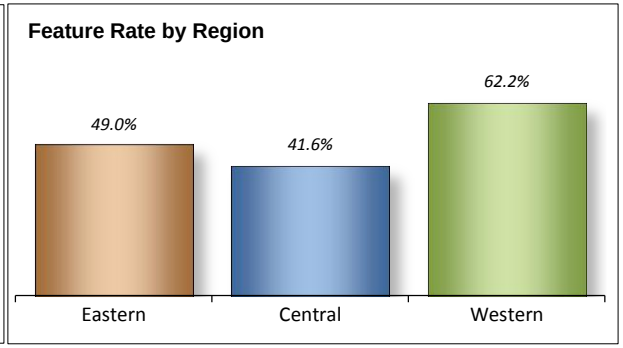
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Feature activity decreases this week. Frozen hen offers increase while frozen toms offers decrease; both are at increased ad price levels. Frozen bone-in breast activity more than triples from a week ago with average pricing higher. Rotisserie breasts are more prevalent and at reduced rates. Other white meat items occupy less ad space. Fresh and smoked dark parts decline significantly from a week ago and with fresh drums, wings, and necks at cheaper rates. Promotional activity on ground turkey rises; 93% lean and sausage continue as the leading offers. Pricing of 93% lean and ground breast meat decline with the balance of grinds showing increased price levels. Feature activity for deli items declines with more emphasis on self-service items but at lower ad prices. Promotions for service deli categories 2 and 3 turkey and for category 1 chicken increase in number; pricing is higher on turkey and lower on chicken.







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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(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/]	**49.0% of 8,400 sampled outlets**			**41.6% of 6,400 sampled outlets**			**62.2% of 4,700 sampled outlets**		
Special Rate [4/]	**0.3% of stores w/ no-price promotions**			**1.1% of stores w/ no-price promotions**			**4.9% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 8,470**			**Activity Index = 3,930**			**Activity Index = 4,450**		
	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									
" - Toms									
Frozen - Hens	1.49	100	1.49	0.75 - 0.99	250	0.87			
" - Toms				0.75 - 1.29	260	0.86			
PARTS:									
Breast:									
Bone-in, whole									
Fresh				1.99	10	1.99			
Frozen	1.48 - 1.99	540	1.86	0.99 - 1.99	290	1.51	0.99 - 2.19	920	1.94
Split, bone-in									
Fresh	2.49	180	2.49						
Rotisserie	5.99 - 8.49	350	7.50	7.49 - 8.99	220	7.52	5.99 - 7.99	580	7.04
Boneless, whole	4.49 - 5.49	220	4.64				3.99	10	3.99
Cutlets	4.15	20	4.15	5.45	80	5.45	3.99 - 4.99	210	4.51
Cutlets, thin sliced	4.99	20	4.99						
Strips	4.99	130	4.99						
Tenders	4.99	10	4.99	4.79	80	4.79	3.99 - 4.99	210	4.51
Marinated Tenders	3.73 - 4.66	470	3.93	3.73 - 4.66	480	3.87	3.32 - 3.33	60	3.32
Drumsticks	1.19	160	1.19	1.19 - 1.39	20	1.33			
Thighs	2.49	10	2.49						
Wings	0.98 - 1.19	170	1.18	1.39	20	1.39			
Necks	1.19	20	1.19	0.98	40	0.98			
Smoked Drumsticks				2.98	10	2.98			
Smoked Wings				1.69	10	1.69			
Smoked Necks									
GROUND TURKEY:									
Patties	2.49 - 3.49	830	2.90	2.99	190	2.99	2.99 - 3.99	200	3.34
Sausage	2.31 - 3.19	1,740	2.77	2.46 - 3.03	250	2.76	2.99 - 3.68	710	3.51
85% lean	1.79 - 2.66	1,460	2.28	1.66 - 2.50	380	2.15	1.79 - 2.59	310	2.05
93% lean	1.99 - 3.33	1,250	2.42	2.20 - 3.33	600	2.83	2.39 - 3.19	1,210	3.03
Breast (99-100% lean)	3.08 - 4.99	600	4.10	3.08 - 4.99	530	4.41			
Rolls (frsh/frz 1 lb.)	1.00	190	1.00	0.98 - 1.49	210	1.14	1.49	30	1.49
Specialty [5/]									
Patties									
93-94% lean	3.99 - 4.99	330	4.62						
Breast							4.59	10	4.59

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Feb 25, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/25 thru 03/03.

(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/	80.1% of 19,500 stores		81.5% of 19,500 stores		88.6% of 8,400 sampled outlets			77.4% of 6,400 sampled outlets			68.6% of 4,700 sampled outlets		
Activity Index 2/	48,230		51,320		Activity Index = 27,350			Activity Index = 12,930			Activity Index = 7,950		
					Price Range	Summary		Price Range	Summary		Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg
SERVICE DELI - Turkey													
Category 1													
Processor Brand	3,460	7.63	6,930	7.48	5.99 - 8.99	2,490	7.65	5.98 - 9.99	570	7.55	6.99 - 11.99	400	7.66
Private Brand	1,720	7.04	3,060	7.66	6.99 - 8.49	1,540	7.03	6.69 - 7.99	180	7.09			
Category 2													
Processor Brand	5,730	5.94	5,000	5.85	4.99 - 6.99	2,930	6.24	4.49 - 6.69	1,350	5.76	4.99 - 6.98	1,450	5.48
Private Brand	3,790	6.26	4,620	6.08	4.99 - 6.99	2,490	6.24	4.99 - 6.99	1,020	6.25	5.99 - 6.99	280	6.47
Category 3													
Processor Brand	2,840	4.28	760	4.19	3.49 - 6.99	1,100	4.41	2.58 - 4.99	1,050	4.05	3.98 - 4.99	690	4.42
Private Brand	360	4.72	80	3.99	3.99 - 4.98	90	4.84	4.99	110	4.99	2.09 - 4.99	160	4.47
Turkey Ham													
Processor Brand	170	3.09	650	3.26	2.79 - 4.49	70	3.63	2.98 - 2.99	40	2.99	1.97 - 2.79	60	2.53
Private Brand	20	2.69	120	5.00	2.69	20	2.69						
Turkey Pastrami													
Processor Brand	240	3.85	750	4.21	3.66 - 4.99	80	3.84	2.99 - 3.99	120	3.81	3.99	40	3.99
Private Brand			30	5.99									
SERVICE DELI - Chicken													
Category 1													
Processor Brand	5,010	7.07	3,020	7.33	5.98 - 8.99	4,180	7.12	4.58 - 7.99	630	6.71	2.29 - 7.99	200	6.97
Private Brand	850	7.01	660	6.95	6.99	270	6.99	6.99 - 7.49	40	7.31	6.99	540	6.99
Category 2													
Processor Brand	390	6.31	500	5.67	6.97	20	6.97	5.98 - 6.49	370	6.28			
Private Brand	230	6.99			6.99	230	6.99						
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	9,580	3.00	10,520	3.12	1.99 - 4.99	5,340	3.08	1.99 - 4.99	3,050	2.95	1.99 - 3.50	1,190	2.76
Private Brand	1,100	2.98	2,390	3.06	2.79 - 3.00	360	2.92	2.99 - 3.79	460	3.16	2.50 - 3.00	280	2.76
Turkey 16 oz													
Processor Brand	3,590	4.07	850	4.41	3.48 - 4.99	1,000	4.23	3.49 - 5.99	1,020	4.12	2.88 - 5.99	1,570	3.94
Private Brand	70	4.39	70	4.39				4.39	70	4.39			
Chicken 7-10 oz													
Processor Brand	7,980	3.01	9,200	3.10	2.49 - 4.99	4,780	3.08	1.99 - 4.99	2,390	2.99	1.99 - 3.50	810	2.69
Private Brand	1,100	2.98	2,110	3.10	2.79 - 3.00	360	2.92	2.99 - 3.79	460	3.16	2.50 - 3.00	280	2.76

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)