USDA Weekly Retail Turkey Feature Activity

Fri. Mar 11, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/11 thru 03/17.

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

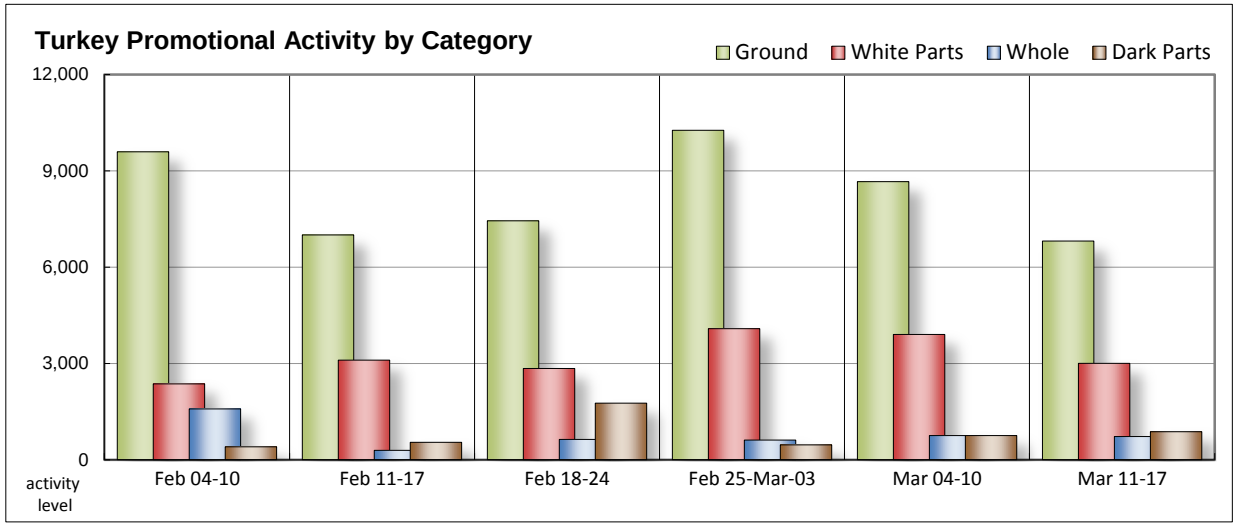
NATIONAL SUMMARY

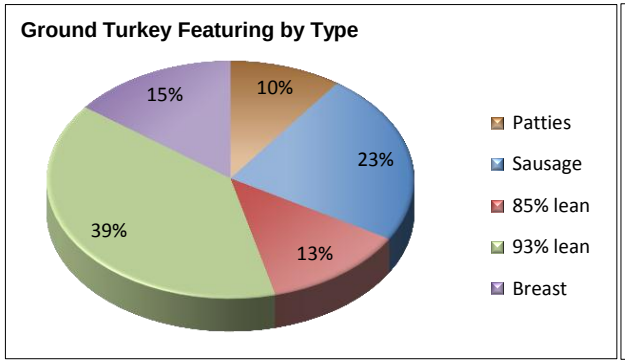
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**43.4% of 19,500 outlets**		**47.6% of 19,500 outlets**		**41.2% of 19,200 outlets**	
Special Rate [4/]	**8.8%**		**6.0%**		**2.4%**	
Activity Index [2/]	**12,320**		**15,020**		**11,650**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens	10	1.59			10	1.69
" - Toms	10	1.59			10	1.69
Frozen - Hens	260	1.00	370	1.15	390	0.78
" - Toms	440	1.02	380	1.16	390	0.78
PARTS:						
Breast:						
Bone-in, whole						
Fresh	220	2.62	100	2.32		
Frozen	1,210	1.45	1,290	1.90	580	1.52
Split, bone-in						
Fresh	10	2.89	10	1.99	40	2.60
Rotisserie	260	7.82	840	7.84	60	6.11
Boneless, whole			110	4.35	120	4.99
Cutlets	600	4.64	920	4.53	1,000	4.72
Cutlets, thin sliced	240	4.97	190	4.87	30	3.99
Strips			10	4.54		
Tenders	460	4.01	430	4.33	870	4.16
Marinated Tenders	180	3.73	250	3.87	490	3.67
Drumsticks	240	2.06	340	1.52	240	1.40
Thighs	10	1.69	20	1.69	160	1.49
Wings	230	2.17	290	1.48	230	1.43
Necks	200	2.20	20	1.39	50	1.07
Smoked Drumsticks	80	2.08	30	1.79	30	1.59
Smoked Wings	70	2.09	30	1.79	30	1.79
Smoked Necks	40	1.59	20	1.79	30	1.39
GROUND TURKEY:	**6,810**	**2.99**	**8,660**	**2.94**	**6,600**	**2.84**
Patties	680	3.11	640	2.60	700	2.72
Sausage	1,600	2.81	1,310	2.81	2,180	2.58
85% lean	860	2.26	1,980	2.15	1,000	1.95
93% lean	2,670	2.75	2,580	2.66	1,180	2.48
Breast	1,000	4.48	2,150	4.17	1,540	4.11
Rolls (frsh/frz 1 lb.)	10	1.50	510	2.19	290	1.30
Specialty [5/]						
Patties					270	3.38
93-94% lean	490	3.57	140	3.49	90	3.84
Breast	240	5.42				

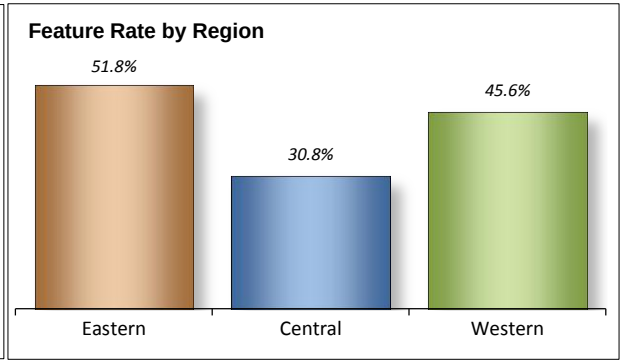
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Turkey activity slows as retailers give more ad space to fish for Lent and corned beef for St. Patrick's Day. Offers slow on frozen hens and increase on toms; prices are sharply lower on hens and toms. Promotional activity improves on fresh bone-in breasts, slows on frozen; prices are higher on fresh, lower on frozen. There is little interest in rotisserie breasts this week and most boneless white cuts are less active. Advertised prices trend higher on cutlets, lower on tenders and marinated tenders. All of the dark parts are represented; fresh drums, wings and necks are the most active. Prices trend higher on most of the dark parts. Offers on ground turkey continue to slide. Fewer stores offer 85% lean or ground breast, instead focusing on the 93% lean. Deli loses ad space to seasonal items. Category 1 processor brands have the largest share this week, with fewer ads on categories 2 and 3 private brands. Offers slow on self-service private brand deli items.







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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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/11 thru 03/17.

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

Fri. Mar 11, 2011

	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/]	**51.8% of 8,400 sampled outlets**			**30.8% of 6,400 sampled outlets**			**45.6% of 4,700 sampled outlets**		
Special Rate [4/]	**12.3% of stores w/ no-price promotions**			**3.7% of stores w/ no-price promotions**			**9.6% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 6,200**			**Activity Index = 2,510**			**Activity Index = 2,880**		
	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	1.59	10	1.59						
" - Toms	1.59	10	1.59						
Frozen - Hens	0.99	20	0.99				1.00	240	1.00
" - Toms	0.99 - 1.29	150	1.05	0.97 - 1.29	50	1.04	1.00	240	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99 - 2.99	210	2.65	1.99	10	1.99			
Frozen	0.99 - 1.29	310	1.19	0.99 - 1.99	850	1.56	0.99 - 1.48	50	1.08
Split, bone-in									
Fresh	2.89	10	2.89						
Rotisserie	5.99 - 8.99	230	7.80	6.99 - 8.99	30	8.03			
Boneless, whole									
Cutlets	3.99 - 5.45	490	4.72	3.99 - 4.54	90	4.09	4.99	20	4.99
Cutlets, thin sliced	4.59 - 4.99	240	4.97						
Strips									
Tenders	3.68 - 3.99	320	3.96	3.99 - 4.00	120	3.99	4.79	20	4.79
Marinated Tenders	3.73	80	3.73	3.73 - 3.99	40	3.92	2.93 - 3.99	60	3.59
Drumsticks	1.99 - 2.39	170	2.36	1.15 - 1.69	70	1.33			
Thighs				1.69	10	1.69			
Wings	1.99 - 2.39	190	2.33	0.98 - 1.69	40	1.39			
Necks	0.79 - 2.39	190	2.26	0.98	10	0.98			
Smoked Drumsticks	1.99	50	1.99	2.00 - 2.49	30	2.23			
Smoked Wings	1.99	40	1.99	2.00 - 2.49	30	2.23			
Smoked Necks	1.59	40	1.59						
GROUND TURKEY:									
Patties	2.69 - 2.99	530	2.94				2.50 - 3.99	150	3.69
Sausage	2.39 - 2.99	710	2.64	2.00 - 3.33	550	2.43	3.35 - 3.93	340	3.78
85% lean	1.89 - 2.53	620	2.26	1.83 - 3.19	240	2.25			
93% lean	2.19 - 3.07	1,210	2.65	2.30 - 3.33	300	2.96	1.91 - 3.35	1,160	2.80
Breast (99-100% lean)	3.08 - 4.61	370	4.24	3.33 - 3.99	30	3.84	3.83 - 4.79	600	4.66
Rolls (frsh/frz 1 lb.)				1.50	10	1.50			
Specialty [5/]									
Patties									
93-94% lean	3.99	100	3.99	3.99	130	3.99	3.19	260	3.19
Breast	3.79	100	3.79	6.79	130	6.79	3.99	10	3.99

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 11, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/11 thru 03/17.

(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/	78.1% of 19,500 stores		88.7% of 19,500 stores		90.0% of 8,400 sampled outlets			74.4% of 6,400 sampled outlets			62.1% of 4,700 sampled outlets		
Activity Index 2/	44,290		56,230		Activity Index = 22,090			Activity Index = 13,120			Activity Index = 9,080		
	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	6,090	7.61	5,250	7.69	5.49 - 9.99	4,090	7.68	5.99 - 9.69	1,100	7.20	6.98 - 9.99	900	7.83
Private Brand	870	7.55	530	7.99	6.99 - 8.99	660	7.35	6.79 - 8.99	210	8.19			
Category 2													
Processor Brand	6,420	6.03	6,560	5.72	4.99 - 6.99	3,160	6.06	4.48 - 6.99	2,050	5.59	4.99 - 6.99	1,210	6.70
Private Brand	3,160	6.32	5,180	6.33	4.97 - 6.99	2,120	6.29	4.99 - 6.99	900	6.28	5.99 - 7.99	140	7.02
Category 3													
Processor Brand	680	4.36	700	3.98	3.98 - 5.99	280	4.60	2.98 - 4.49	230	3.66	3.49 - 5.99	170	4.93
Private Brand	320	4.98	1,490	4.90	3.99 - 5.99	60	4.92	4.99	130	4.99	4.99	130	4.99
Turkey Ham													
Processor Brand	310	3.55	110	3.14	2.99 - 4.99	180	4.03	2.99 - 4.99	50	3.55	1.99 - 2.99	80	2.47
Private Brand			30	3.98									
Turkey Pastrami													
Processor Brand	550	4.27	100	4.20	2.99 - 4.49	290	3.94	2.99 - 6.99	110	4.14	2.98 - 9.49	150	5.00
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,090	7.68	3,200	7.12	5.98 - 8.99	2,290	7.92	5.98 - 8.99	800	7.01			
Private Brand	1,220	6.90	870	6.81	5.99 - 6.99	770	6.97	5.95 - 6.99	450	6.78			
Category 2													
Processor Brand	380	5.28	300	5.07	5.97 - 6.99	40	6.62	4.88 - 6.99	170	5.25	4.99	170	4.99
Private Brand	220	7.99	280	5.99							7.99	220	7.99
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	10,820	3.11	13,330	3.08	1.93 - 4.99	4,450	3.13	1.99 - 3.99	3,240	3.04	2.50 - 4.59	3,130	3.16
Private Brand	1,160	2.92	3,070	3.18	3.00 - 3.29	400	3.01	2.50 - 3.00	390	2.85	2.50 - 3.50	370	2.91
Turkey 16 oz													
Processor Brand	420	4.83	1,380	4.42	3.50 - 6.49	80	5.97	3.00 - 4.99	260	4.01	3.99 - 6.99	80	6.37
Private Brand													
Chicken 7-10 oz													
Processor Brand	8,040	3.11	11,810	3.04	2.00 - 3.99	3,190	3.10	1.99 - 3.99	2,890	3.04	2.50 - 4.59	1,960	3.24
Private Brand	540	2.95	2,040	3.26	3.00 - 3.29	30	3.15	2.99	140	2.99	2.50 - 3.50	370	2.91

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)