USDA Weekly Retail Turkey Feature Activity

Fri. Mar 18, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/18 thru 03/24.

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

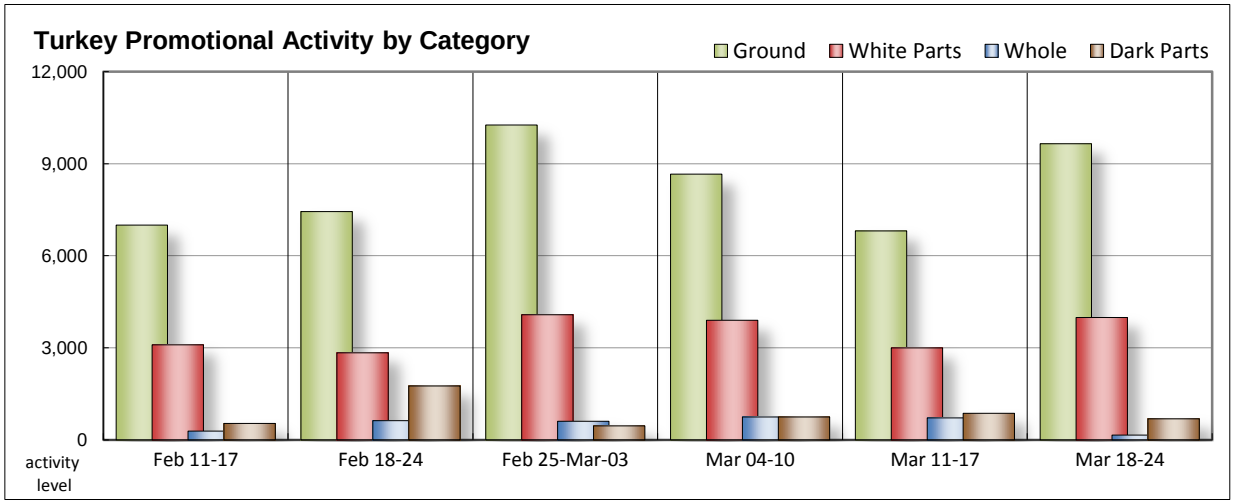
NATIONAL SUMMARY

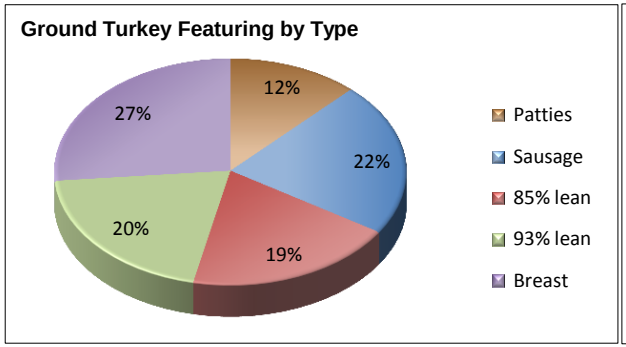
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	53.7% of 19,500 outlets		43.4% of 19,500 outlets		43.0% of 19,200 outlets	
Special Rate 4/	2.3%		8.8%		8.4%	
Activity Index 2/	19,100		12,320		14,310	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			10	1.59	140	1.57
" - Toms			10	1.59	140	1.57
Frozen - Hens	50	0.99	260	1.00	810	0.87
" - Toms	110	0.97	440	1.02	870	0.87
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	1.99	220	2.62	250	2.38
Frozen	1,350	1.81	1,210	1.45	1,410	1.40
Split, bone-in						
Fresh			10	2.89		
Rotisserie	260	8.96	260	7.82	500	7.26
Boneless, whole	440	5.10			210	4.89
Cutlets	1,370	5.06	600	4.64	640	4.62
Cutlets, thin sliced	40	4.27	240	4.97	260	4.59
Strips					30	4.54
Tenders	520	5.04	460	4.01	250	4.60
Marinated Tenders	3,750	4.38	180	3.73	780	3.93
Drumsticks	290	1.58	240	2.06	200	1.42
Thighs	70	2.07	10	1.69	10	1.89
Wings	260	1.59	230	2.17	210	1.44
Necks	30	1.28	200	2.20	10	1.39
Smoked Drumsticks	20	1.82	80	2.08	40	1.79
Smoked Wings	20	1.98	70	2.09	80	1.79
Smoked Necks			40	1.59	40	1.64
GROUND TURKEY:	**9,650**	**3.15**	**6,810**	**2.99**	**6,960**	**2.67**
Patties	1,170	3.16	680	3.11	860	2.64
Sausage	2,120	2.91	1,600	2.81	3,140	2.58
85% lean	1,860	2.17	860	2.26	860	2.00
93% lean	1,950	2.80	2,670	2.75	1,340	2.71
Breast	2,550	4.34	1,000	4.48	760	3.80
Rolls (frsh/frz 1 lb.)	700	1.91	10	1.50	410	1.34
Specialty 5/						
Patties					120	3.50
93-94% lean	30	4.16	140	3.49	20	3.50
Breast	130	6.49				

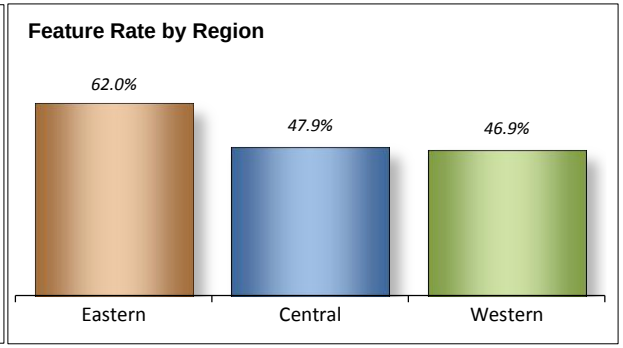
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retailers increase feature activity on turkey and deli. Interest in fresh and frozen whole turkeys drops, but kosher turkeys for Passover are making an appearance. Offers on frozen bone-in breast increase; prices are higher. Promotional activity on rotisserie breasts is unchanged, but the average advertised price is sharply higher. Boneless white parts are popular this week. Retailers found new interest in boneless skinless breast, could this be a trend? Cutlets and marinated tenders dominate the boneless white parts category; prices are quite a bit higher on both items. Fresh drums and wings are well represented; interest on other dark parts is limited. Offers on ground items reverse the downward trend; ground breast grabs the most ad space but all items are well represented. Service deli activity increases on processor brands; self-service deli private brands are more widely promoted. Processor brand 16 oz turkey is very popular this week.







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)

Fri. Mar 18, 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/]	**62.0% of 8,400 sampled outlets**			**47.9% of 6,400 sampled outlets**			**46.9% of 4,700 sampled outlets**		
Special Rate [4/]	**2.5% of stores w/ no-price promotions**			**3.3% of stores w/ no-price promotions**			**0.7% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 9,890**			**Activity Index = 4,870**			**Activity Index = 4,180**		
	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	50	0.99			
" - Toms				0.89 - 1.29	110	0.97			
PARTS:									
Breast:									
Bone-in, whole									
Fresh							1.99	10	1.99
Frozen	1.79	380	1.79	1.29 - 1.99	660	1.62	1.49 - 2.39	310	2.22
Split, bone-in									
Fresh									
Rotisserie	7.99 - 8.99	230	8.96	8.99	30	8.99			
Boneless, whole	3.99 - 4.99	310	4.31				6.99	130	6.99
Cutlets	3.49 - 5.99	820	4.53	4.49 - 6.35	170	5.31	5.45 - 6.35	380	6.07
Cutlets, thin sliced	3.99 - 4.99	40	4.27						
Strips									
Tenders	3.99 - 4.23	140	4.21				4.79 - 5.59	380	5.34
Marinated Tenders	2.66 - 4.79	2,850	4.32	3.73 - 5.59	340	4.85	2.93 - 4.66	560	4.39
Drumsticks	1.29 - 1.99	230	1.57	1.29 - 1.79	60	1.62			
Thighs	1.99 - 2.29	50	2.17	1.69 - 1.99	20	1.82			
Wings	1.39 - 1.99	210	1.63	1.29 - 1.49	50	1.39			
Necks	1.19	20	1.19	1.39 - 1.49	10	1.45			
Smoked Drumsticks				1.49 - 1.98	20	1.82			
Smoked Wings				1.98	20	1.98			
Smoked Necks									
GROUND TURKEY:									
Patties	2.50 - 3.79	720	2.96	2.49 - 3.99	410	3.48	3.49	40	3.49
Sausage	2.39 - 3.79	1,480	2.89	2.39 - 3.27	470	2.98	2.86	170	2.86
85% lean	1.79 - 2.68	540	2.16	1.65 - 2.50	560	2.24	1.59 - 3.19	760	2.12
93% lean	2.50 - 3.19	880	2.91	1.99 - 3.19	860	2.62	2.59 - 3.19	210	3.04
Breast (99-100% lean)	3.33 - 4.99	760	4.32	3.33 - 4.79	600	3.92	3.19 - 4.79	1,190	4.56
Rolls (frsh/frz 1 lb.)	1.50	230	1.50	1.00 - 2.79	430	2.10	2.29	40	2.29
Specialty [5/]									
Patties									
93-94% lean	3.99 - 4.99	30	4.16						
Breast	6.49	130	6.49						

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 18, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/18 thru 03/24.

(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/	79.1% of 19,500 stores		78.1% of 19,500 stores		88.8% of 8,400 sampled outlets			68.8% of 6,400 sampled outlets			75.9% of 4,700 sampled outlets		
Activity Index 2/	44,450		44,290		Activity Index = 22,750			Activity Index = 11,490			Activity Index = 10,210		
	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	6,790	7.55	6,090	7.61	5.49 - 9.49	5,160	7.61	5.98 - 8.99	980	7.34	6.99 - 11.99	650	7.41
Private Brand	320	7.69	870	7.55	7.49 - 8.99	120	7.70	6.99 - 8.99	190	7.56	9.99	10	9.99
Category 2													
Processor Brand	7,790	5.85	6,420	6.03	4.98 - 6.99	3,890	6.13	4.49 - 6.99	1,820	5.73	4.98 - 6.99	2,080	5.43
Private Brand	1,930	6.49	3,160	6.32	5.99 - 6.99	1,350	6.82	4.48 - 5.99	470	5.87	4.99	110	4.99
Category 3													
Processor Brand	1,070	4.04	680	4.36	2.99 - 3.99	100	3.61	2.98 - 4.98	930	4.11	3.49	40	3.49
Private Brand	40	4.48	320	4.98	4.48	40	4.48						
Turkey Ham													
Processor Brand	410	3.55	310	3.55	2.98 - 5.99	160	3.99	3.58 - 3.99	70	3.88	2.49 - 3.49	180	3.04
Private Brand													
Turkey Pastrami													
Processor Brand	250	4.05	550	4.27	3.49 - 4.99	200	4.05	2.99 - 4.44	50	4.03			
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,680	7.06	3,090	7.68	4.99 - 7.99	1,330	7.43	3.99 - 7.98	710	6.19	5.39 - 7.99	640	7.26
Private Brand	850	7.45	1,220	6.90	6.99 - 7.99	550	7.82	6.49 - 7.49	300	6.78			
Category 2													
Processor Brand	1,310	5.36	380	5.28				4.98 - 5.99	220	5.94	4.99 - 5.49	1,090	5.24
Private Brand			220	7.99									
SELF-SERVICE DELI (dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	7,020	3.08	10,820	3.11	2.49 - 3.99	4,140	3.06	2.50 - 3.99	1,680	3.17	2.49 - 3.99	1,200	3.03
Private Brand	2,430	3.07	1,160	2.92	2.69 - 3.50	460	3.22	2.50 - 3.50	1,080	2.91	3.00 - 3.50	890	3.20
Turkey 16 oz													
Processor Brand	2,230	5.12	420	4.83	4.49 - 6.59	740	5.21	3.99 - 5.29	260	4.89	4.99 - 5.99	1,230	5.11
Private Brand													
Chicken 7-10 oz													
Processor Brand	6,900	3.08	8,040	3.11	2.49 - 3.99	4,050	3.07	2.50 - 3.99	1,650	3.17	2.49 - 3.99	1,200	3.03
Private Brand	2,430	3.07	540	2.95	2.69 - 3.50	460	3.22	2.50 - 3.50	1,080	2.91	3.00 - 3.50	890	3.20

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)