



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/25 thru 03/31.**

Fri. Mar 25, 2011

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

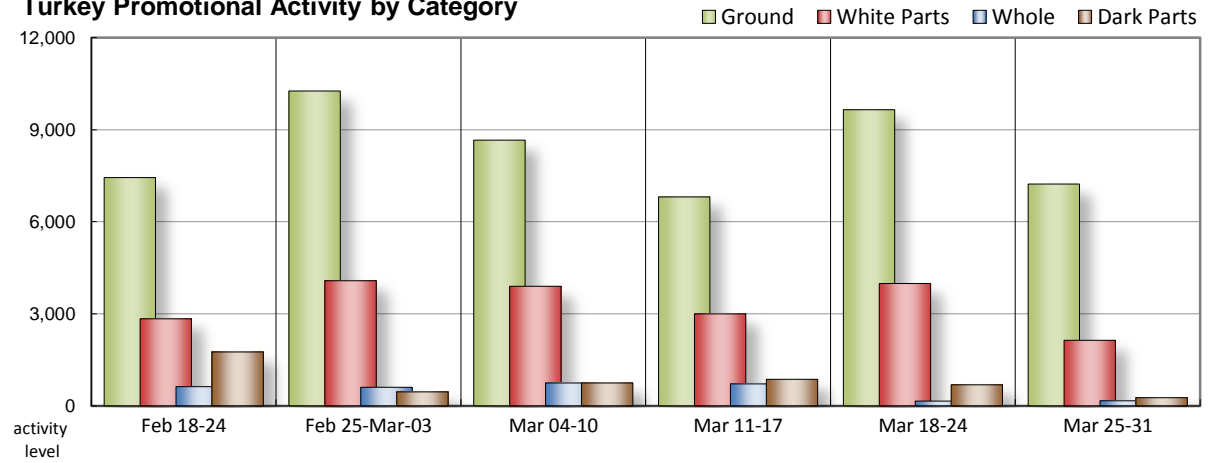
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>45.8% of 19,500 outlets</b>		<b>53.7% of 19,500 outlets</b>		<b>55.2% of 19,200 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>9.4%</b>		<b>2.3%</b>		<b>7.2%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>11,460</b>		<b>19,100</b>		<b>27,860</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens					4,110	1.37
" - Toms					3,220	1.34
Frozen - Hens	90	0.97	50	0.99	3,430	0.94
" - Toms	80	0.91	110	0.97	4,100	0.95
<b>PARTS:</b>						
<b>Breast:</b>						
<b>Bone-in, whole</b>						
Fresh	40	2.39	10	1.99	270	2.41
Frozen	490	2.06	1,350	1.81	2,440	1.47
<b>Split, bone-in</b>						
Fresh					10	2.69
Rotisserie	560	6.91	260	8.96	10	8.99
<b>Boneless, whole</b>						
Cutlets	30	4.41	440	5.10	70	4.30
Cutlets, thin sliced	570	4.41	1,370	5.06	410	4.76
Strips	250	3.99	40	4.27	150	4.99
Tenders	200	4.24	520	5.04	180	3.99
Marinated Tenders	1,050	3.71	3,750	4.38	900	3.89
<b>Drumsticks</b>						
Thighs	40	1.51	290	1.58	40	1.63
Wings	80	1.90	70	2.07	50	1.99
Necks	50	1.55	260	1.59	80	1.54
Smoked Drumsticks	60	1.35	30	1.28	10	1.39
Smoked Wings	20	1.99	20	1.82	60	1.64
Smoked Necks	20	1.99	20	1.98	60	1.64
					50	1.69
<b>GROUND TURKEY:</b>	<b>7,230</b>	<b>2.72</b>	<b>9,650</b>	<b>3.15</b>	<b>8,010</b>	<b>2.85</b>
Patties	540	2.85	1,170	3.16	580	2.56
Sausage	1,590	2.99	2,120	2.91	2,480	2.78
85% lean	1,920	2.25	1,860	2.17	1,980	2.06
93% lean	2,470	2.54	1,950	2.80	1,250	2.58
Breast	710	3.92	2,550	4.34	1,720	4.17
Rolls (frsh/frz 1 lb.)	380	2.38	700	1.91	20	1.12
<b>Specialty</b> <sup>5/</sup>						
Patties	10	4.99				
93-94% lean	60	4.23	140	3.49	130	4.49
Breast	150	6.43				

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

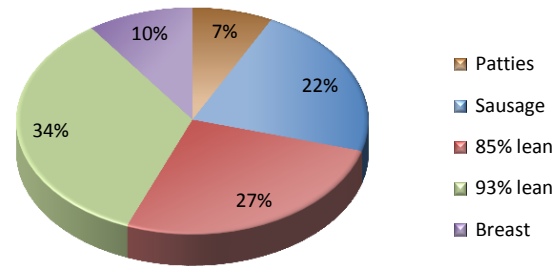
**This Week's Turkey Feature Highlights**

Retail activity slows going into the end of the month. A scattering of frozen hens and toms are offered at lower prices. Promotions on frozen bone-in drop sharply and prices are higher. This week last year we were heading into the holidays and whole turkeys and bone-in breasts were heavily promoted. Hopefully we'll see more turkeys offered as we get closer to Easter and Passover. Rotisserie breasts are more available and attractively priced. Boneless cuts are not as active, but prices are more competitive this week. Fewer dark parts are featured. Offers on ground turkey slow; the weighted average price is lower. The less expensive 85% and 93% lean replace sausage and ground breast as this week's favorites. Deli activity increases even as fewer stores feature deli items. Promotions on Category 1 private brand and Category 2 processor and private brands all increase. Retailers offer fewer self-service processor brands and increase offers on private brands.

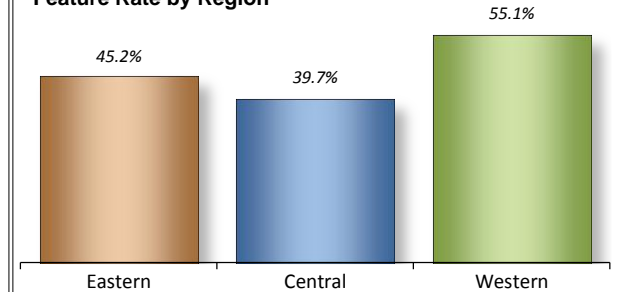
**Turkey Promotional Activity by Category**



**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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Fri. Mar 25, 2011

(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 <sup>1/</sup> Special Rate <sup>4/</sup> Activity Index <sup>2/</sup>	45.2% of 8,400 sampled outlets 5.4% of stores w/ no-price promotions Activity Index = 6,160			39.7% of 6,400 sampled outlets 4.4% of stores w/ no-price promotions Activity Index = 3,220			55.1% of 4,700 sampled outlets 23.3% of stores w/ no-price promotions Activity Index = 1,860		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens				0.79 - 1.39	90	0.97			
" - Toms				0.79 - 0.99	80	0.91			
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh	2.79	20	2.79	1.99	10	1.99	1.99	10	1.99
Frozen	1.38 - 1.99	110	1.92	1.49 - 1.99	140	1.93	2.19	240	2.19
Split, bone-in									
Fresh									
Rotisserie	5.99 - 7.99	390	7.18	6.99 - 8.99	30	7.70	5.99	140	5.99
Boneless, whole	3.99 - 4.99	30	4.41						
Cutlets	3.99 - 4.99	510	4.42	3.99 - 4.59	60	4.36			
Cutlets, thin sliced	3.99	250	3.99						
Strips									
Tenders	4.49	100	4.49	3.99	30	3.99	3.99	70	3.99
Marinated Tenders	3.33 - 4.26	470	3.83	2.66 - 3.73	550	3.62	3.19 - 3.33	30	3.26
Drumsticks	1.49 - 1.89	20	1.65	1.29 - 1.39	20	1.36			
Thighs	1.69 - 1.89	20	1.77	1.69 - 1.99	60	1.94			
Wings	1.19 - 1.99	30	1.65	1.39	20	1.39			
Necks				1.29 - 1.39	60	1.35			
Smoked Drumsticks	1.99	20	1.99						
Smoked Wings	1.99	20	1.99						
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	1.97 - 3.99	350	2.39	2.50 - 3.99	190	3.72			
Sausage	2.39 - 3.19	920	2.81	2.46 - 3.79	540	3.22	3.27	130	3.27
85% lean	1.89 - 2.66	1,280	2.28	1.93 - 2.50	420	2.15	2.16 - 2.49	220	2.32
93% lean	1.79 - 3.59	1,430	2.56	2.33 - 3.19	310	2.88	1.91 - 3.19	730	2.37
Breast (99-100% lean)	3.89 - 4.61	190	4.33	3.33 - 4.16	500	3.77	3.83	20	3.83
Rolls (frsh/frz 1 lb.)				1.00 - 2.46	110	1.45	1.00 - 2.99	270	2.76
<b>Specialty <sup>3/</sup></b>									
Patties	4.99	10	4.99						
93-94% lean	4.49 - 4.99	40	4.70	3.29	20	3.29			
Breast	5.99 - 6.49	150	6.43						



**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 03/25 thru 03/31.  
 (prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Mar 25, 2011

Feature Rate <sup>1/</sup>	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)			
	73.4% of 19,500 stores		79.1% of 19,500 stores		91.5% of 8,400 sampled outlets				62.2% of 6,400 sampled outlets				56.5% of 4,700 sampled outlets			
Activity Index <sup>2/</sup>	50,590		44,450		Activity Index = 29,020				Activity Index = 13,960				Activity Index = 7,610			
	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				
<b>SERVICE DELI - Turkey</b>																
<b>Category 1</b>																
Processor Brand	5,400	8.01	6,790	7.55	5.49 - 9.69	3,780	7.93	6.98 - 9.49	1,460	8.17	6.99 - 12.99	160	8.34			
Private Brand	2,940	7.87	320	7.69	6.88 - 8.99	2,590	7.92	6.77 - 9.99	350	7.49						
<b>Category 2</b>																
Processor Brand	10,620	5.79	7,790	5.85	3.99 - 7.99	6,730	5.92	4.00 - 7.00	2,810	5.60	4.99 - 5.99	1,080	5.48			
Private Brand	6,150	6.50	1,930	6.49	4.99 - 6.99	2,600	6.22	4.48 - 6.99	1,270	6.12	5.99 - 7.99	2,280	7.03			
<b>Category 3</b>																
Processor Brand	810	4.10	1,070	4.04	3.98 - 3.99	350	3.99	2.99 - 4.49	370	4.23	3.97 - 3.99	90	3.98			
Private Brand	500	4.54	40	4.48	3.99 - 4.99	370	4.38	4.99	130	4.99						
<b>Turkey Ham</b>																
Processor Brand	210	3.27	410	3.55	2.98 - 6.98	50	4.33	2.59 - 4.49	160	2.93						
Private Brand																
<b>Turkey Pastrami</b>																
Processor Brand	120	3.62	250	4.05	4.99	10	4.99	2.99 - 4.49	70	3.96	2.69	40	2.69			
Private Brand																
<b>SERVICE DELI - Chicken</b>																
<b>Category 1</b>																
Processor Brand	2,730	7.62	2,680	7.06	4.99 - 8.99	1,950	7.81	4.99 - 9.99	500	7.29	5.98 - 8.99	280	6.95			
Private Brand	70	6.74	850	7.45				5.99 - 6.99	70	6.74						
<b>Category 2</b>																
Processor Brand	30	4.18	1,310	5.36	3.99	10	3.99	3.99 - 4.58	20	4.27						
Private Brand	80	5.99						5.99	80	5.99						
<b>SELF-SERVICE DELI</b>																
(dollars per tub or pouch)																
<b>Turkey 7-10 oz</b>																
Processor Brand	9,390	3.16	7,020	3.08	2.26 - 4.00	4,890	3.20	2.00 - 4.00	2,940	3.16	1.99 - 3.99	1,560	3.06			
Private Brand	1,190	2.99	2,430	3.07	3.00	410	3.00	2.99	480	2.99	2.99	300	2.99			
<b>Turkey 16 oz</b>																
Processor Brand	810	5.02	2,230	5.12	4.99 - 5.99	780	5.03	4.99	30	4.99						
Private Brand	10	4.98						4.98	10	4.98						
<b>Chicken 7-10 oz</b>																
Processor Brand	8,570	3.18	6,900	3.08	2.50 - 4.00	4,320	3.22	2.00 - 4.00	2,730	3.19	1.99 - 3.99	1,520	3.06			
Private Brand	960	2.99	2,430	3.07	3.00	180	3.00	2.99	480	2.99	2.99	300	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)