USDA Weekly Retail Turkey Feature Activity

Fri. Apr 01, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/01 thru 04/07.

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

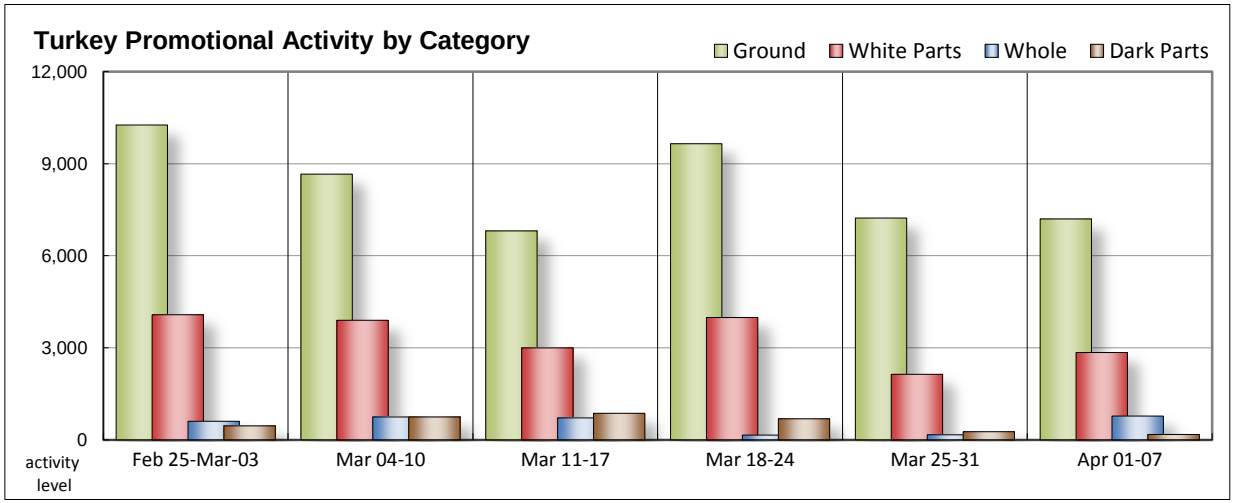
NATIONAL SUMMARY

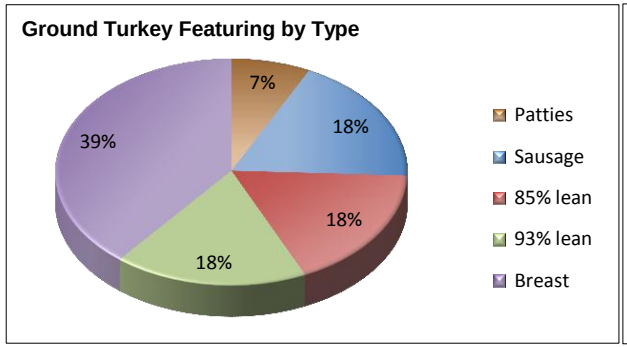
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	42.0% of 19,500 outlets		45.8% of 19,500 outlets		85.8% of 19,200 outlets	
Special Rate [4/]	6.5%		9.4%		4.6%	
Activity Index [2/]	12,290		11,460		57,010	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	30	1.59			11,950	1.31
" - Toms	30	1.59			9,940	1.30
Frozen - Hens	360	0.95	90	0.97	10,040	0.90
" - Toms	360	0.94	80	0.91	8,620	0.88
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.74	40	2.39	2,620	2.30
Frozen	890	1.81	490	2.06	6,820	1.50
Split, bone-in						
Fresh	10	2.79			60	2.49
Rotisserie	640	6.51	560	6.91	870	6.81
Boneless, whole	40	3.82	30	4.41	260	4.16
Cutlets	880	4.64	570	4.41	380	4.25
Cutlets, thin sliced			250	3.99	300	4.78
Strips						
Tenders	370	4.38	200	4.24	10	4.99
Marinated Tenders	690	3.69	1,050	3.71	950	3.99
Drumsticks	50	1.61	40	1.51	10	1.49
Thighs	30	2.09	80	1.90	10	1.49
Wings	20	1.44	50	1.55	10	1.49
Necks	20	1.29	60	1.35		
Smoked Drumsticks	10	1.69	20	1.99	80	1.84
Smoked Wings	50	1.93	20	1.99	70	1.94
Smoked Necks					50	1.48
GROUND TURKEY:	**7,200**	**3.26**	**7,230**	**2.72**	**3,920**	**3.10**
Patties	530	3.07	540	2.85	120	2.89
Sausage	1,320	2.74	1,590	2.99	800	2.64
85% lean	1,260	2.26	1,920	2.25	1,060	2.24
93% lean	1,270	3.00	2,470	2.54	820	2.70
Breast	2,820	4.10	710	3.92	1,120	4.55
Rolls (frsh/frz 1 lb.)	440	2.09	380	2.38		
Specialty [5/]						
Patties	60	5.24				
93-94% lean	30	3.99	140	3.49	20	3.33
Breast	60	5.66				

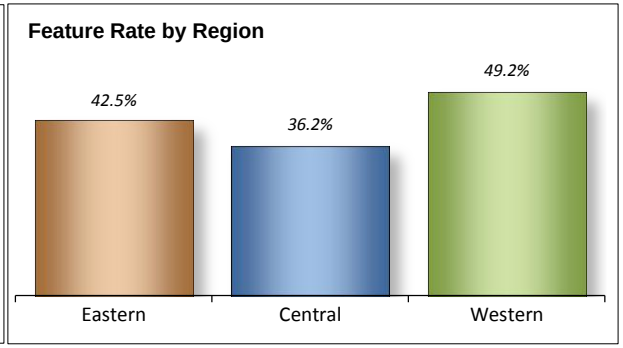
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

It's the first of the month and activity is slightly higher on turkey items, lower on deli meats. Momentum continues to build on whole turkeys going into the holidays. Offers on frozen bone-in breasts are more frequent and advertised prices trend lower. Rotisserie breasts are more available and prices are lower this week. Cutlets replace marinated tenders as the most popular choice among the boneless white parts. Retailers offer the same selection of dark parts as last week; prices trend higher on fresh drums and thighs, lower on the balance of items. Ground turkey is holding steady at last week's level of activity. This week ground breast represents almost 40% of the mix, a good choice for first of the month shoppers with extra cash. More stores offer deli items, but limit their selections. Promotions slow on Category 1, drop sharply on Category 2, increase on Category 3. The less expensive self-service deli is more active, especially the processor brands.







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/]	**42.5% of 8,400 sampled outlets**			**36.2% of 6,400 sampled outlets**			**49.2% of 4,700 sampled outlets**		
Special Rate [4/]	**6.0% of stores w/ no-price promotions**			**6.6% of stores w/ no-price promotions**			**7.6% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 6,160**			**Activity Index = 2,640**			**Activity Index = 3,340**		
	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				1.59	20	1.59
" - Toms	1.59	10	1.59				1.59	20	1.59
Frozen - Hens	1.19	20	1.19	0.68 - 0.99	100	0.80	1.00	240	1.00
" - Toms	1.19	20	1.19	0.58 - 0.99	100	0.74	1.00	240	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69 - 2.79	20	2.74						
Frozen	1.29 - 1.99	200	1.96	1.38 - 1.99	610	1.80	1.49 - 1.99	80	1.52
Split, bone-in									
Fresh	2.79	10	2.79						
Rotisserie	3.74 - 8.99	550	6.36	5.49	20	5.49	7.99	70	7.99
Boneless, whole	3.99	30	3.99				3.29	10	3.29
Cutlets	2.99 - 5.45	770	4.67	3.99 - 5.45	100	4.32	5.39	10	5.39
Cutlets, thin sliced									
Strips									
Tenders	3.29 - 4.79	40	4.24	4.79	10	4.79	4.33 - 4.39	320	4.38
Marinated Tenders	3.73 - 4.59	180	4.15	3.73	260	3.73	3.33	250	3.33
Drumsticks	1.49	10	1.49	1.28 - 1.89	40	1.64			
Thighs	2.29	20	2.29	1.69	10	1.69			
Wings	1.49	10	1.49	1.39	10	1.39			
Necks				1.29	20	1.29			
Smoked Drumsticks				1.69	10	1.69			
Smoked Wings	1.99	40	1.99	1.69	10	1.69			
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 3.49	250	3.04	2.50 - 3.49	150	3.18	3.00	130	3.00
Sausage	2.39 - 3.99	1,000	2.67	2.39 - 3.27	170	2.97	2.79 - 3.00	150	2.97
85% lean	1.99 - 2.92	670	2.41	1.66 - 2.49	530	2.09	1.83 - 2.39	60	2.15
93% lean	2.84 - 3.84	630	3.04	2.50 - 3.19	200	2.75	2.95 - 3.99	440	3.05
Breast (99-100% lean)	3.07 - 4.99	1,670	4.24	3.07 - 4.79	140	3.47	2.79 - 5.39	1,010	3.96
Rolls (frsh/frz 1 lb.)				0.97 - 2.00	150	1.77	2.00 - 2.50	290	2.25
Specialty [5/]									
Patties	5.49	50	5.49	3.99	10	3.99			
93-94% lean	3.99	20	3.99	3.99	10	3.99			
Breast	5.99	40	5.99	4.99	20	4.99			

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Apr 01, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/01 thru 04/07.

(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/	79.8% of 19,500 stores		73.4% of 19,500 stores		85.8% of 8,400 sampled outlets			85.2% of 6,400 sampled outlets			61.8% of 4,700 sampled outlets		
Activity Index 2/	46,500		50,590		Activity Index = 23,120			Activity Index = 14,260			Activity Index = 9,120		
	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	5,300	8.03	5,400	8.01	5.29 - 11.99	3,680	8.10	5.49 - 9.99	750	7.65	4.99 - 10.99	870	8.08
Private Brand	1,250	7.51	2,940	7.87	5.99 - 8.99	970	7.38	6.99 - 8.99	280	7.96			
Category 2													
Processor Brand	3,430	5.97	10,620	5.79	3.99 - 7.88	2,010	5.89	4.04 - 6.99	1,200	6.04	4.99 - 6.99	220	6.38
Private Brand	6,950	6.34	6,150	6.50	4.99 - 6.99	2,240	6.40	3.99 - 6.99	2,950	6.01	4.99 - 7.49	1,760	6.82
Category 3													
Processor Brand	1,480	4.25	810	4.10	3.88 - 4.99	670	4.43	2.98 - 4.98	680	3.92	4.99	130	4.99
Private Brand	1,600	4.78	500	4.54	3.98 - 4.88	1,160	4.84	2.99 - 4.99	210	4.80	4.49	230	4.49
Turkey Ham													
Processor Brand	430	3.02	210	3.27	2.69 - 3.98	240	3.30	2.59 - 3.49	130	2.71	2.27 - 2.99	60	2.54
Private Brand	20	3.49			3.49	20	3.49						
Turkey Pastrami													
Processor Brand	360	4.71	120	3.62	3.59 - 5.99	280	4.65	2.99 - 6.98	80	4.89			
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,350	7.46	2,730	7.62	5.29 - 9.49	1,660	7.47	4.49 - 8.99	640	7.35	7.99 - 9.99	50	8.63
Private Brand	910	7.24	70	6.74	6.99 - 7.49	910	7.24						
Category 2													
Processor Brand	150	5.80	30	4.18	4.98	10	4.98	4.58 - 6.99	140	5.86			
Private Brand	200	5.49	80	5.99				5.49	200	5.49			
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	10,090	3.07	9,390	3.16	2.50 - 3.99	4,200	3.19	1.99 - 3.99	3,020	2.87	2.50 - 3.99	2,870	3.11
Private Brand	950	3.00	1,190	2.99	2.19 - 2.99	340	2.88	2.49 - 3.50	570	3.11	2.49	40	2.49
Turkey 16 oz													
Processor Brand	470	4.88	810	5.02	4.49 - 5.99	330	4.88	3.99 - 5.99	140	4.89			
Private Brand			10	4.98									
Chicken 7-10 oz													
Processor Brand	9,610	3.08	8,570	3.18	2.50 - 3.99	4,060	3.19	1.99 - 3.99	2,700	2.89	2.50 - 3.99	2,850	3.11
Private Brand	950	3.00	960	2.99	2.19 - 2.99	340	2.88	2.49 - 3.50	570	3.11	2.49	40	2.49

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)