USDA Weekly Retail Turkey Feature Activity

Fri. Apr 08, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/08 thru 04/14.

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

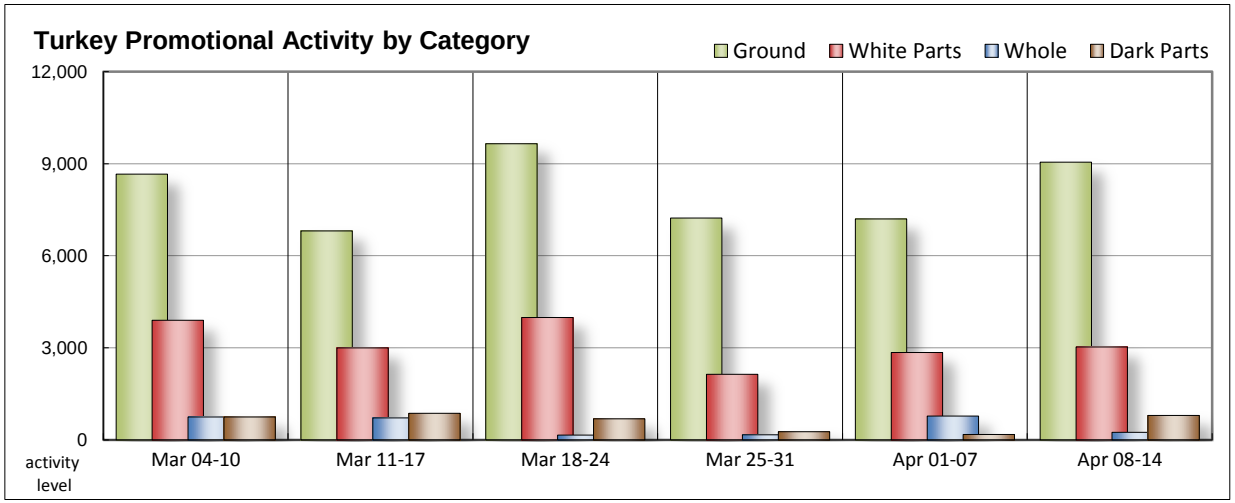
NATIONAL SUMMARY

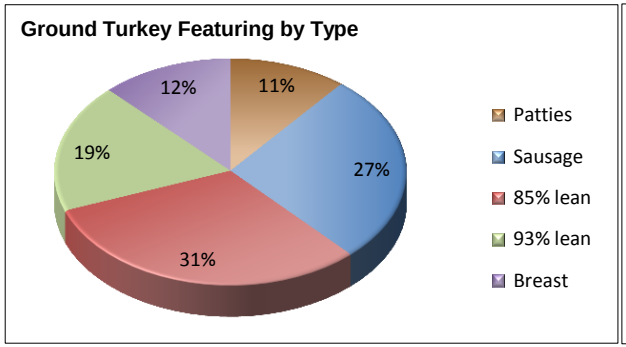
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	41.9% of 19,500 outlets		42.0% of 19,500 outlets		49.2% of 19,200 outlets	
Special Rate 4/	1.1%		6.5%		4.3%	
Activity Index 2/	14,690		12,290		16,770	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	20	1.49	30	1.59	10	1.29
" - Toms	20	1.49	30	1.59		
Frozen - Hens	50	1.07	360	0.95	10	0.79
" - Toms	160	0.92	360	0.94	10	0.79
PARTS:						
Breast:						
Bone-in, whole						
Fresh	110	2.99	20	2.74	50	2.87
Frozen	140	1.56	890	1.81	960	1.35
Split, bone-in						
Fresh	50	2.97	10	2.79	20	2.84
Rotisserie	660	7.79	640	6.51	730	7.92
Boneless, whole	570	4.49	40	3.82	90	3.99
Cutlets	1,130	4.56	880	4.64	360	4.59
Cutlets, thin sliced					710	4.66
Strips						
Tenders	370	4.22	370	4.38	1,040	4.04
Marinated Tenders	440	3.79	690	3.69	450	3.83
Drumsticks	90	1.74	50	1.61	410	1.54
Thighs	90	2.12	30	2.09	20	1.99
Wings	60	1.89	20	1.44	370	1.57
Necks			20	1.29	360	1.57
Smoked Drumsticks	150	2.16	10	1.69	60	1.92
Smoked Wings	140	2.16	50	1.93	70	1.95
Smoked Necks	270	1.79			60	1.84
GROUND TURKEY:	**9,050**	**2.77**	**7,200**	**3.26**	**10,250**	**2.78**
Patties	990	3.01	530	3.07	380	3.47
Sausage	2,460	2.85	1,320	2.74	2,230	2.63
85% lean	2,820	1.97	1,260	2.26	2,470	1.98
93% lean	1,670	2.85	1,270	3.00	3,340	2.57
Breast	1,110	4.27	2,820	4.10	1,830	4.26
Rolls (frsh/frz 1 lb.)	950	2.69	440	2.09	730	1.64
Specialty 5/						
Patties						
93-94% lean	170	4.24	140	3.49	290	4.13
Breast					30	5.99

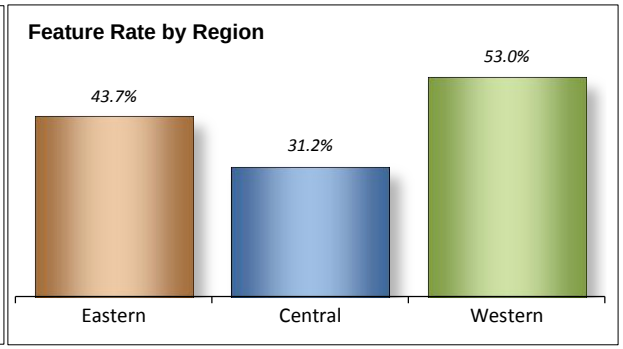
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail activity improves going into the middle of the month. Fewer stores offer whole body turkeys; next week should pick up as we get closer to Easter. Frozen kosher turkeys for Passover are heavily promoted this week. Offers on frozen bone-in breast are limited; fresh bone-in breasts are more available. Activity on rotisserie breasts is about unchanged, but prices are sharply higher. Boneless whole breasts are finally in the spotlight; only cutlets are more heavily promoted among the white parts. Offers on tenders are unchanged, lower on marinated tenders. Dark parts are more active, but at higher prices. Ground turkey is a popular choice; retailers focus on sausage and 85% lean to the detriment of ground breast. Activity on deli meats is about unchanged. Offers increase on Category 1 and Category 2 service deli meat. Activity on processor brands of self -service deli is almost half of last week's volume; private brands are heavily promoted.







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/]	**43.7% of 8,400 sampled outlets**			**31.2% of 6,400 sampled outlets**			**53.0% of 4,700 sampled outlets**		
Special Rate [4/]	**0.0% of stores w/ no-price promotions**			**0.8% of stores w/ no-price promotions**			**3.5% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 7,870**			**Activity Index = 2,390**			**Activity Index = 4,260**		
	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				1.49	20	1.49			
" - Toms				1.49	20	1.49			
Frozen - Hens				0.99 - 1.39	50	1.07			
" - Toms				0.89 - 0.99	160	0.92			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	110	2.99						
Frozen	0.99 - 1.58	40	1.18	1.39 - 1.99	70	1.64	1.89	30	1.89
Split, bone-in									
Fresh	2.89	10	2.89				2.99	40	2.99
Rotisserie	5.99 - 8.99	160	6.54	8.99	100	8.99	7.99	400	7.99
Boneless, whole	4.49	570	4.49						
Cutlets	3.99 - 4.99	960	4.54	3.99 - 5.45	170	4.66			
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.99	200	4.04	3.99 - 4.79	170	4.43			
Marinated Tenders	3.73 - 4.26	360	3.91	3.19 - 3.73	80	3.28			
Drumsticks				1.39 - 1.59	50	1.55	1.99	40	1.99
Thighs	2.29 - 2.49	40	2.35	1.69	10	1.69	1.99	40	1.99
Wings				1.39 - 1.99	20	1.69	1.99	40	1.99
Necks									
Smoked Drumsticks	1.69 - 2.19	140	2.16	2.25	10	2.25			
Smoked Wings	1.69 - 2.19	140	2.16						
Smoked Necks	1.59 - 1.99	270	1.79						
GROUND TURKEY:									
Patties	2.89 - 3.49	500	2.98	2.50 - 3.50	130	3.24	1.79 - 3.99	360	2.97
Sausage	2.39 - 3.79	1,760	2.90	2.99	20	2.99	2.05 - 3.49	680	2.72
85% lean	1.67 - 3.00	850	2.29	1.66 - 2.39	570	1.92	1.67 - 2.39	1,400	1.79
93% lean	1.84 - 3.45	1,120	2.89	2.08 - 2.80	160	2.48	2.79 - 3.99	390	2.90
Breast (99-100% lean)	4.61 - 4.99	400	4.68	3.99 - 4.79	520	4.24	2.80 - 4.99	190	3.51
Rolls (frsh/frz 1 lb.)	2.00 - 2.69	240	2.21	0.99 - 1.89	60	1.32	2.99	650	2.99
Specialty [5/]									
Patties									
93-94% lean	3.99 - 4.49	150	4.41	3.00	20	3.00			
Breast									

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Apr 08, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/08 thru 04/14.

(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/	78.5% of 19,500 stores		79.8% of 19,500 stores		85.9% of 8,400 sampled outlets			70.7% of 6,400 sampled outlets			76.1% of 4,700 sampled outlets		
Activity Index 2/	46,200		46,500		Activity Index = 21,970			Activity Index = 14,900			Activity Index = 9,330		
					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	5,860	7.23	5,300	8.03	5.48 - 9.79	3,700	7.24	5.49 - 9.69	1,900	7.15	5.99 - 10.99	260	7.67
Private Brand	2,580	7.56	1,250	7.51	5.99 - 10.99	1,980	7.38	6.59 - 8.99	600	8.17			
Category 2													
Processor Brand	5,880	6.10	3,430	5.97	4.49 - 6.99	3,780	6.04	4.49 - 6.99	1,540	6.24	4.99 - 6.98	560	6.10
Private Brand	4,780	6.12	6,950	6.34	4.99 - 6.99	1,080	5.81	4.98 - 6.99	1,950	5.76	5.99 - 7.99	1,750	6.71
Category 3													
Processor Brand	1,550	4.25	1,480	4.25	3.47 - 5.99	810	4.23	2.89 - 4.99	410	3.80	3.99 - 5.99	330	4.85
Private Brand	470	5.50	1,600	4.78	2.99 - 5.99	320	5.27				5.99	150	5.99
Turkey Ham													
Processor Brand	140	3.22	430	3.02	3.49 - 4.99	60	3.96	1.99 - 2.98	50	2.30	3.29	30	3.29
Private Brand			20	3.49									
Turkey Pastrami													
Processor Brand	260	4.21	360	4.71	2.99 - 4.99	180	4.12	2.98 - 9.49	40	5.56	3.29	40	3.29
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	4,540	7.29	2,350	7.46	4.49 - 8.99	2,970	7.50	4.99 - 7.99	1,410	6.89	5.99 - 9.99	160	6.88
Private Brand	970	6.61	910	7.24	5.99 - 6.99	460	6.98	5.99	10	5.99	5.00 - 7.99	500	6.29
Category 2													
Processor Brand	390	6.31	150	5.80	5.99	100	5.99	3.99 - 6.99	290	6.43			
Private Brand	180	6.49	200	5.49	6.49	180	6.49						
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	5,640	3.11	10,090	3.07	2.00 - 3.99	2,350	3.20	1.99 - 3.99	2,370	3.04	2.50 - 3.99	920	3.07
Private Brand	3,760	3.19	950	3.00	2.99 - 3.50	840	3.25	2.50 - 3.50	1,140	3.04	2.50 - 3.49	1,780	3.25
Turkey 16 oz													
Processor Brand	580	5.17	470	4.88	3.99 - 6.49	100	5.64	3.49 - 5.49	330	4.66	5.99	150	5.99
Private Brand	10	3.99						3.99	10	3.99			
Chicken 7-10 oz													
Processor Brand	5,040	3.10	9,610	3.08	2.00 - 3.99	2,220	3.20	1.99 - 3.88	1,900	3.00	2.50 - 3.99	920	3.07
Private Brand	3,570	3.21	950	3.00	2.99 - 3.50	840	3.25	2.50 - 3.50	950	3.10	2.50 - 3.49	1,780	3.25

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)