



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/15 thru 04/21.

Fri. Apr 15, 2011

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

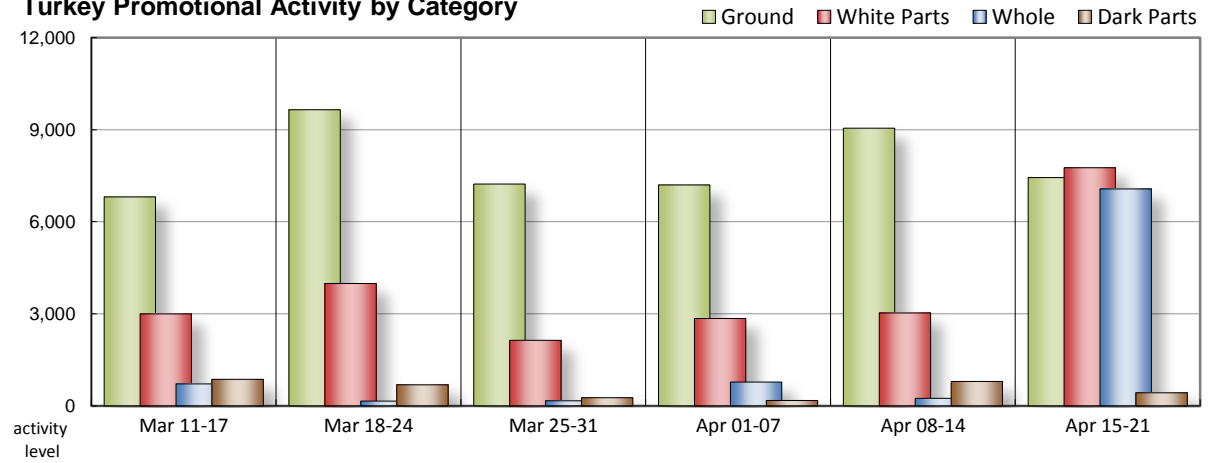
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	51.5% of 19,500 outlets		41.9% of 19,500 outlets		54.3% of 19,200 outlets	
Special Rate ^{4/}	3.7%		1.1%		3.1%	
Activity Index ^{2/}	24,240		14,690		18,070	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	2,500	1.40	20	1.49		
" - Toms	1,890	1.37	20	1.49		
Frozen - Hens	1,400	1.16	50	1.07		
" - Toms	1,280	1.06	160	0.92		
PARTS:						
Breast:						
Bone-in, whole						
Fresh	570	2.59	110	2.99	120	2.79
Frozen	3,610	1.71	140	1.56	1,500	1.57
Split, bone-in						
Fresh	10	2.79	50	2.97		
Rotisserie	2,850	8.17	660	7.79	500	7.63
Boneless, whole						
Cutlets	270	4.75	1,130	4.56	450	5.00
Cutlets, thin sliced						
Strips						
Tenders	230	4.42	370	4.22	230	4.80
Marinated Tenders	790	3.77	440	3.79	2,680	4.03
Drumsticks						
Thighs	30	1.36	90	1.74	220	1.28
Wings	10	1.69	90	2.12	60	1.89
Necks	50	1.61	60	1.89	70	1.82
Smoked Drumsticks	40	1.31			70	1.48
Smoked Wings	150	2.02	150	2.16	10	2.19
Smoked Necks	150	2.02	140	2.16	10	2.19
	270	1.79				
GROUND TURKEY:	7,440	3.00	9,050	2.77	11,570	2.69
Patties	740	2.70	990	3.01	1,890	2.79
Sausage	550	3.00	2,460	2.85	2,170	2.72
85% lean	1,530	2.26	2,820	1.97	2,940	1.97
93% lean	3,370	2.89	1,670	2.85	2,720	2.54
Breast	1,250	4.41	1,110	4.27	1,850	3.91
Rolls (frsh/frz 1 lb.)	540	1.52	950	2.69	490	1.52
Specialty ^{5/}						
Patties						
93-94% lean	10	3.79	140	3.49		
Breast	200	4.54			120	4.50

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

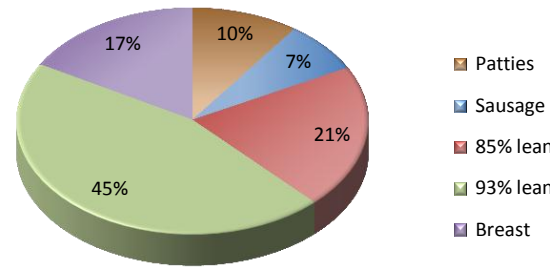
This Week's Turkey Feature Highlights

Over half the retailers surveyed offer turkey heading into the holidays. Offers on fresh and frozen whole turkeys are widespread; prices are lower on fresh, higher on frozen. Kosher turkeys are heavily promoted in the Eastern region. Promotions on frozen bone-in breasts are very active; prices are sharply higher. Have a smaller family, or don't want to spend much time in the kitchen? Rotisserie breasts are a good choice and they are especially active in the Western region. Promotions slow on cutlets and tenders; increase on marinated tenders. Fewer stores offer dark parts; average advertised prices are lower. Ground turkey is less active as retailer focus on holiday items. Almost half of the ground ads are for 93% lean. Feature activity on deli items increases due to heavy promotional activity on self-service deli items. Offers almost double on self-service processor brands and practically disappear on private brands.

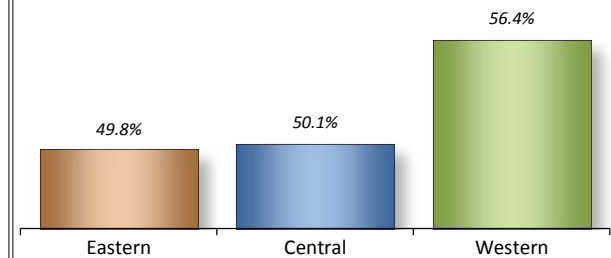
Turkey Promotional Activity by Category



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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	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/} Special Rate ^{4/} Activity Index ^{2/}	49.8% of 8,400 sampled outlets 2.3% of stores w/ no-price promotions Activity Index = 13,160			50.1% of 6,400 sampled outlets 5.2% of stores w/ no-price promotions Activity Index = 5,530			56.4% of 4,700 sampled outlets 4.3% of stores w/ no-price promotions Activity Index = 5,340		
	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	0.99 - 2.49	1,970	1.36	1.48 - 1.89	250	1.57	1.59	280	1.59
" - Toms	0.99 - 2.49	1,370	1.28	1.48 - 1.89	240	1.57	1.59	280	1.59
Frozen - Hens	0.99 - 1.49	990	1.22	0.69 - 1.39	410	1.02			
" - Toms	0.69 - 1.69	780	1.11	0.69 - 1.39	500	0.99			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.19 - 2.79	390	2.68	1.89 - 2.49	170	2.43	1.99	10	1.99
Frozen	1.39 - 1.99	1,580	1.76	1.29 - 1.99	1,200	1.61	1.49 - 1.99	830	1.75
Split, bone-in									
Fresh	2.79	10	2.79						
Rotisserie	5.99 - 8.99	970	6.70	5.99 - 9.49	290	8.20	6.99 - 9.99	1,590	9.07
Boneless, whole	3.99 - 4.99	220	4.48						
Cutlets	4.99	150	4.99	3.99	10	3.99	4.49	110	4.49
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.99	120	4.36				4.49	110	4.49
Marinated Tenders	3.73 - 4.79	460	3.86	3.19 - 4.14	290	3.60	3.99	40	3.99
Drumsticks				1.29 - 1.39	30	1.36			
Thighs				1.69	10	1.69			
Wings	1.99	20	1.99	1.29 - 1.39	30	1.36			
Necks	1.29	20	1.29	1.29 - 1.39	20	1.34			
Smoked Drumsticks	1.99	140	1.99	2.39	10	2.39			
Smoked Wings	1.99	140	1.99	2.39	10	2.39			
Smoked Necks									
GROUND TURKEY:									
Patties	2.29 - 3.79	430	2.73	2.29 - 2.99	280	2.68	2.50	30	2.50
Sausage	2.95 - 3.19	500	3.03	2.50 - 3.00	30	2.67	2.79	20	2.79
85% lean	1.79 - 2.66	1,030	2.26	1.58 - 2.50	500	2.24			
93% lean	2.30 - 3.19	1,410	2.76	2.40 - 3.19	730	2.70	1.91 - 3.19	1,230	3.13
Breast (99-100% lean)	3.07 - 4.99	270	3.47	4.16 - 4.79	300	4.56	3.91 - 5.41	680	4.71
Rolls (frsh/frz 1 lb.)	1.00	190	1.00	0.98 - 1.88	220	1.40	2.49	130	2.49
Specialty ^{3/}									
Patties									
93-94% lean							3.79	10	3.79
Breast	4.49	180	4.49				3.99 - 5.79	20	4.95



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 04/15 thru 04/21.
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Fri. Apr 15, 2011

Feature Rate ^{1/}	NATIONAL SUMMARY				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)			
	This Week		Last Week		88.6% of 8,400 sampled outlets				75.1% of 6,400 sampled outlets				62.2% of 4,700 sampled outlets			
	77.7% of 19,500 stores		78.5% of 19,500 stores		Activity Index = 26,840				Activity Index = 14,790				Activity Index = 8,520			
Activity Index ^{2/}	50,150		46,200		Price Range (\$/pound)				Price Range (\$/pound)				Price Range (\$/pound)			
	Stores	Wtd Avg	Stores	Wtd Avg	Summary		Summary		Summary		Summary		Summary			
					Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		
SERVICE DELI - Turkey																
Category 1																
Processor Brand	4,930	7.68	5,860	7.23	4.99 - 9.49	2,810	7.67	5.99 - 8.99	1,430	7.72	4.99 - 12.99	690	7.65			
Private Brand	2,670	8.30	2,580	7.56	6.99 - 8.99	2,310	8.48	6.99 - 7.99	360	7.13						
Category 2																
Processor Brand	8,160	5.75	5,880	6.10	4.97 - 6.99	3,310	5.94	4.29 - 6.99	3,660	5.45	4.99 - 6.99	1,190	6.14			
Private Brand	2,890	6.74	4,780	6.12	4.99 - 6.99	1,990	6.79	5.99 - 6.49	360	6.09	6.99	540	6.99			
Category 3																
Processor Brand	1,070	3.92	1,550	4.25	3.78 - 4.99	420	4.54	2.98 - 4.99	500	3.68	2.79 - 3.49	150	2.99			
Private Brand	550	5.70	470	5.50	3.99 - 4.48	70	4.28	5.49 - 5.99	190	5.79	5.99	290	5.99			
Turkey Ham																
Processor Brand	190	3.50	140	3.22	3.59 - 3.99	160	3.66	2.79	10	2.79	2.50 - 2.79	20	2.57			
Private Brand	20	4.49			4.49	20	4.49									
Turkey Pastrami																
Processor Brand	210	3.88	260	4.21	3.59 - 3.98	140	3.61	3.59 - 6.99	50	4.61	3.99	20	3.99			
Private Brand																
SERVICE DELI - Chicken																
Category 1																
Processor Brand	3,550	7.30	4,540	7.29	5.97 - 9.49	2,410	7.45	4.98 - 9.99	520	6.61	5.49 - 8.99	620	7.26			
Private Brand	1,740	7.04	970	6.61	6.99 - 7.49	1,490	7.04	6.99	250	6.99						
Category 2																
Processor Brand	610	6.25	390	6.31				4.58 - 7.19	610	6.25						
Private Brand			180	6.49												
SELF-SERVICE DELI (dollars per tub or pouch)																
Turkey 7-10 oz																
Processor Brand	11,470	3.20	5,640	3.11	2.22 - 3.99	5,790	3.26	1.98 - 3.99	3,440	3.08	2.50 - 4.59	2,240	3.25			
Private Brand	340	3.33	3,760	3.19	3.49	120	3.49	2.99 - 3.50	80	3.24	2.99 - 3.49	140	3.25			
Turkey 16 oz																
Processor Brand	600	5.42	580	5.17	3.50 - 6.49	290	5.58	4.29 - 5.99	70	5.22	4.99 - 5.99	240	5.28			
Private Brand			10	3.99												
Chicken 7-10 oz																
Processor Brand	10,810	3.24	5,040	3.10	2.50 - 3.99	5,390	3.32	1.98 - 3.99	3,180	3.08	2.50 - 4.59	2,240	3.25			
Private Brand	340	3.33	3,570	3.21	3.49	120	3.49	2.99 - 3.50	80	3.24	2.99 - 3.49	140	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)

A full breakdown of supermarket promotions featuring turkey and other poultry for **Easter/Passover** will be available on April 22, 2011 on our website at:

www.ams.usda.gov/pymarketnews.htm

"Poultry and Egg Market Reports"
"Holiday Advertising"

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, roaster chickens, capons, cornish hens, gizzards, livers, ducklings, geese, baking hens, shell eggs, egg nog, and liquid egg products.

This and all of our other holiday promotions reports are also available in spreadsheet format. Please contact us at the number/e-mail address below to receive the spreadsheet files.

USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911 - PYMN@ams.usda.gov