



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/10 thru 06/16.

Fri. Jun 10, 2011

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

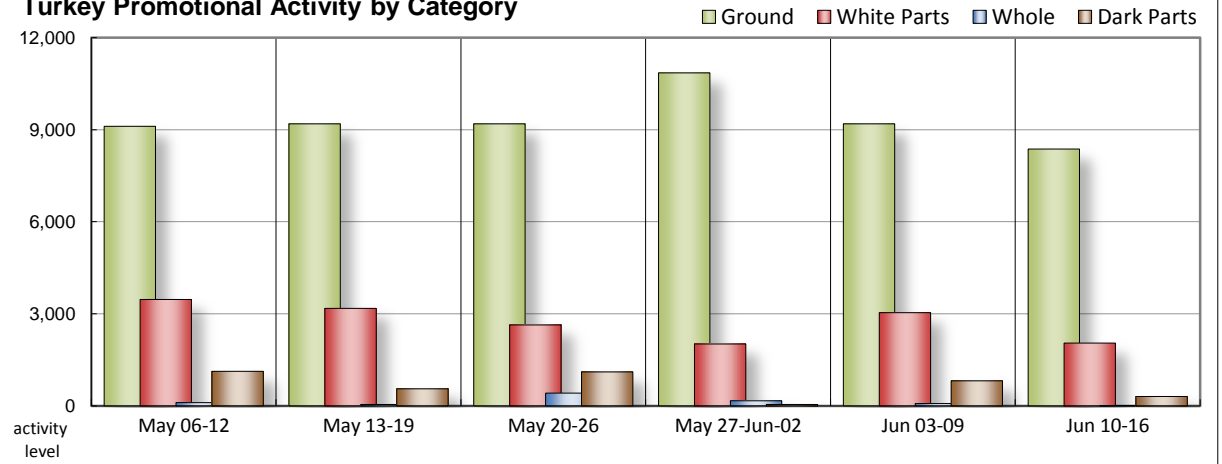
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	48.6% of 19,500 outlets		44.4% of 19,500 outlets		42.3% of 19,200 outlets	
Special Rate ^{4/}	3.6%		4.3%		4.5%	
Activity Index ^{2/}	13,350		14,080		11,930	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	10	1.49	40	0.99	200	0.93
" - Toms			40	0.99	80	0.93
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	320	1.60	470	1.42	520	1.39
Split, bone-in						
Fresh	20	1.99				
Rotisserie	230	7.59	1,010	7.74	110	7.15
Boneless, whole						
	50	4.99	210	4.37	370	4.50
Cutlets						
	1,130	5.05	820	4.65	490	4.56
Cutlets, thin sliced						
			40	4.39	150	4.66
Strips						
Tenders	300	5.15	490	5.43	420	4.56
Marinated Tenders						
	810	3.91	470	3.59	550	3.66
Drumsticks						
	130	1.61	180	1.36	40	1.59
Thighs						
			20	1.49	30	1.69
Wings						
	10	2.00	190	1.37	10	1.29
Necks						
	10	2.00	10	0.78		
Smoked Drumsticks						
	50	2.36	140	2.33	70	2.03
Smoked Wings						
	50	2.36	140	2.33	70	2.08
Smoked Necks						
	60	1.70	140	1.59	60	1.99
GROUND TURKEY:						
	8,370	2.86	9,190	2.91	8,430	2.90
Patties						
	570	2.60	770	3.03	1,000	2.93
Sausage						
	750	2.75	1,510	2.86	890	2.73
85% lean						
	2,380	2.19	2,280	1.88	2,150	2.37
93% lean						
	3,680	2.87	2,330	2.77	2,800	2.68
Breast						
	990	4.62	2,300	4.09	1,590	4.09
Rolls (frsh/frz 1 lb.)						
	1,100	2.15	190	1.96	330	1.66
Specialty ^{5/}						
Patties	60	3.99			830	3.66
93-94% lean	570	3.99	140	3.49	200	2.92
Breast	70	5.29				

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

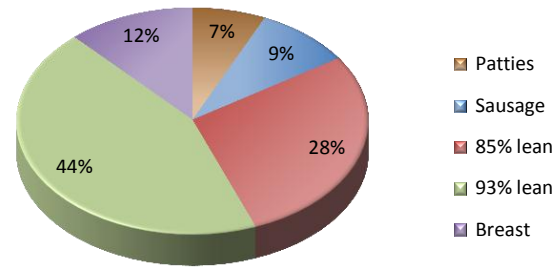
This Week's Turkey Feature Highlights

More retailers are featuring turkey, although they are being more selective. Whole turkeys are a rare sight; bone-in breasts are less available and priced higher. Fewer stores offer rotisserie; average prices are lower. The big white parts items this week are cutlets followed by marinated tenders. Prices trend higher on cutlets and marinated tenders, lower on tenders. If you are looking for dark parts you will pay more this week; prices trend higher on all items. Feature activity on ground turkey is the lowest it has been in recent weeks. The majority of ads focus on 93% lean followed by 85% lean. Stores just don't seem very interested in patties, especially compared to a year ago. Specialty 93-94% lean makes a good showing this week; could this be a trend? Fewer retailers feature covered deli items. Activity slows on Category 1, picks up on Category 2. Prices are mixed but mostly lower. Self-service deli picks up; private brands are attractively priced this week.

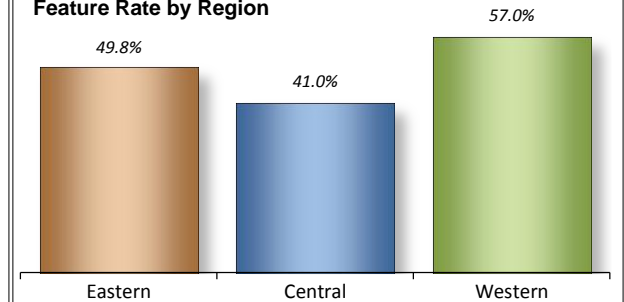
Turkey Promotional Activity by Category



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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(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/} Special Rate ^{4/} Activity Index ^{2/}	49.8% of 8,400 sampled outlets 4.6% of stores w/ no-price promotions Activity Index = 5,540			41.0% of 6,400 sampled outlets 3.1% of stores w/ no-price promotions Activity Index = 3,280			57.0% of 4,700 sampled outlets 2.7% of stores w/ no-price promotions Activity Index = 3,830		
	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				1.49	10	1.49			
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.99	230	1.60	0.99 - 1.89	80	1.58	1.58	10	1.58
Split, bone-in									
Fresh				1.99	20	1.99			
Rotisserie	6.89 - 8.99	170	7.74	5.50	20	5.50	7.99	40	7.99
Boneless, whole	4.99	30	4.99				4.99	20	4.99
Cutlets	3.99 - 5.49	850	4.77				4.99 - 6.35	280	5.89
Cutlets, thin sliced									
Strips									
Tenders							4.00 - 5.59	300	5.15
Marinated Tenders	3.49 - 4.26	170	4.14	3.33 - 4.66	270	3.94	3.33 - 4.66	370	3.78
Drumsticks	1.39 - 1.99	90	1.64	1.29 - 2.00	40	1.53			
Thighs									
Wings				2.00	10	2.00			
Necks				2.00	10	2.00			
Smoked Drumsticks	2.39	40	2.39	2.25	10	2.25			
Smoked Wings	2.39	40	2.39	2.25	10	2.25			
Smoked Necks	1.59	50	1.59	2.25	10	2.25			
GROUND TURKEY:									
Patties	2.49 - 3.99	340	2.66	2.50 - 2.69	230	2.51			
Sausage	2.80 - 3.00	370	2.90	2.08 - 3.19	70	2.86	2.04 - 3.27	310	2.55
85% lean	1.92 - 2.68	740	2.26	1.66 - 2.50	990	2.13	1.99 - 2.50	650	2.22
93% lean	2.50 - 3.33	1,850	2.84	1.67 - 3.33	670	2.72	2.08 - 3.19	1,160	3.01
Breast (99-100% lean)	3.84 - 4.61	570	4.54	4.79	120	4.79	4.39 - 4.99	300	4.70
Rolls (frsh/frz 1 lb.)				1.00 - 3.79	710	1.98	1.49 - 2.50	390	2.45
Specialty ^{3/}									
Patties	3.99	60	3.99						
93-94% lean	3.99	570	3.99						
Breast	4.99 - 5.99	40	5.56	5.00	20	5.00	4.79	10	4.79



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 06/10 thru 06/16.
 (prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Jun 10, 2011

Feature Rate ^{1/}	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)			
	66.9% of 19,500 stores		80.5% of 19,500 stores		73.0% of 8,400 sampled outlets				76.8% of 6,400 sampled outlets				42.6% of 4,700 sampled outlets			
Activity Index ^{2/}	41,030		42,530		Activity Index = 21,550				Activity Index = 12,720				Activity Index = 6,760			
	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				
SERVICE DELI - Turkey																
Category 1																
Processor Brand	3,860	7.64	5,630	8.08	5.49 - 9.99	2,910	7.74	5.98 - 8.49	800	7.22	6.99 - 12.99	150	8.02			
Private Brand	2,700	7.19	2,130	7.31	6.99 - 9.99	2,520	7.10				7.99 - 10.99	180	8.47			
Category 2																
Processor Brand	6,410	6.00	4,640	6.05	4.99 - 7.99	3,400	5.97	4.58 - 7.99	1,920	6.08	4.99 - 6.99	1,090	5.97			
Private Brand	3,640	6.15	3,480	6.49	5.99 - 6.99	2,120	6.36	4.99 - 6.99	780	5.73	5.99	740	5.99			
Category 3																
Processor Brand	1,320	3.70	1,660	3.92	2.97 - 4.99	430	4.00	2.88 - 3.99	680	3.44	2.99 - 4.99	210	3.92			
Private Brand	300	5.20	50	4.73	4.48 - 5.99	300	5.20									
Turkey Ham																
Processor Brand	200	3.79	320	3.34	3.98 - 4.99	110	4.49	2.59 - 3.48	20	2.90	1.98 - 3.29	70	2.95			
Private Brand																
Turkey Pastrami																
Processor Brand	180	3.72	300	4.08	3.49 - 3.99	140	3.62	2.48 - 7.99	40	4.09						
Private Brand			30	5.99												
SERVICE DELI - Chicken																
Category 1																
Processor Brand	2,930	7.44	3,160	7.77	4.99 - 8.99	2,060	7.69	4.98 - 8.99	850	6.82	7.99 - 8.49	20	8.37			
Private Brand	750	6.95	1,570	6.86	6.99	210	6.99	6.99	510	6.99	5.99	30	5.99			
Category 2																
Processor Brand	580	5.98	210	5.48	4.99 - 5.99	10	5.53	5.74 - 5.99	50	5.95	5.99	520	5.99			
Private Brand	870	5.90	160	7.42	5.99	50	5.99	5.58	190	5.58	5.99	630	5.99			
SELF-SERVICE DELI																
(dollars per tub or pouch)																
Turkey 7-10 oz																
Processor Brand	6,860	3.23	6,780	3.00	1.93 - 3.99	2,450	3.25	2.00 - 3.99	2,830	3.04	2.99 - 3.99	1,580	3.53			
Private Brand	2,160	2.70	2,110	3.05	2.39 - 3.50	1,530	2.61	2.39 - 3.50	630	2.92						
Turkey 16 oz																
Processor Brand	470	5.18	2,200	4.88	4.98 - 5.99	230	5.06	4.98 - 5.99	240	5.29						
Private Brand			1,410	5.00												
Chicken 7-10 oz																
Processor Brand	5,800	3.28	4,580	3.09	2.50 - 3.99	1,710	3.38	2.00 - 3.99	2,550	3.06	2.99 - 3.99	1,540	3.54			
Private Brand	2,000	2.65	2,110	3.05	2.39 - 3.50	1,370	2.53	2.39 - 3.50	630	2.92						

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)