



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

Fri. Jul 01, 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/}	40.8% of 19,500 outlets		48.8% of 19,500 outlets		38.1% of 19,200 outlets	
Special Rate ^{4/}	7.9%		9.1%		3.2%	
Activity Index ^{2/}	13,160		15,190		12,220	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	80	1.55			30	1.29
" - Toms	40	1.49				
Frozen - Hens			270	1.05	10	0.99
" - Toms			270	1.05	10	0.99
PARTS:						
Breast:						
Bone-in, whole						
Fresh					180	2.29
Frozen	520	1.73	270	1.04	260	1.69
Split, bone-in						
Fresh	10	2.99			180	2.29
Rotisserie	60	7.30	1,570	8.68	150	7.99
Boneless, whole					240	5.21
Cutlets	300	4.66	860	4.22	40	4.48
Cutlets, thin sliced	30	4.35	20	3.99		
Strips	10	4.54				
Tenders	90	4.77	310	4.16		
Marinated Tenders	1,380	3.95	590	4.08	760	3.94
Drumsticks	200	1.79	80	1.47	20	1.39
Thighs	200	1.79	30	2.29		
Wings	200	1.79	10	1.48	60	1.78
Necks					20	1.39
Smoked Drumsticks	40	2.39	140	2.40	60	1.85
Smoked Wings	40	2.39	140	2.40	20	1.59
Smoked Necks	40	1.59	130	1.59	60	1.72
GROUND TURKEY:	9,620	2.86	9,880	2.74	9,550	2.87
Patties	2,040	2.94	1,430	2.83	1,240	2.72
Sausage	2,710	2.90	2,320	2.84	3,650	2.71
85% lean	2,010	2.36	2,060	2.40	1,730	2.32
93% lean	2,290	2.82	3,470	2.57	1,680	2.65
Breast	570	4.15	600	4.33	1,250	4.51
Rolls (frsh/frz 1 lb.)	40	1.49	410	1.65	750	1.80
Specialty ^{5/}						
Patties	10	4.99			330	3.90
93-94% lean	20	3.00	140	3.49	130	4.51
Breast	230	5.48				

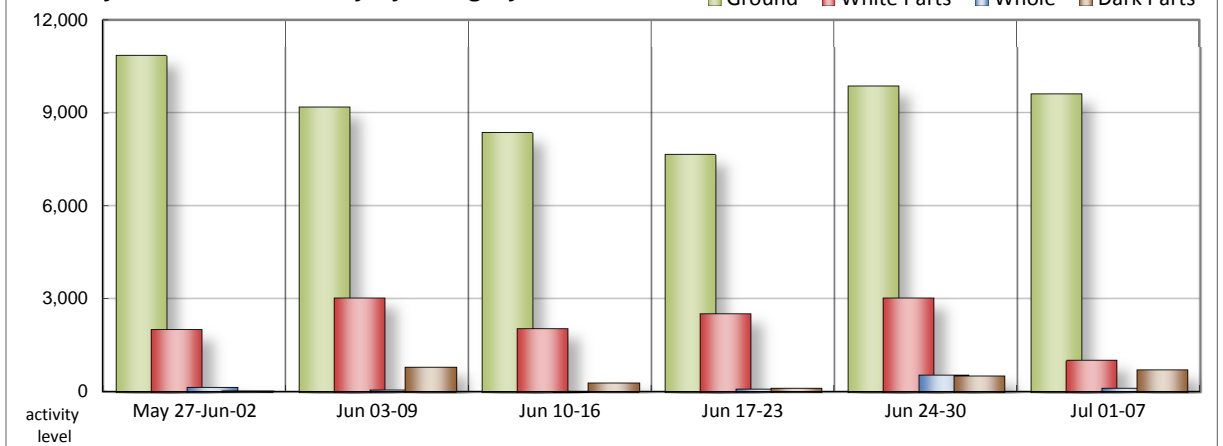
Note: rolls & specialty not included in ground turkey total and weighted average.

Source: USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911

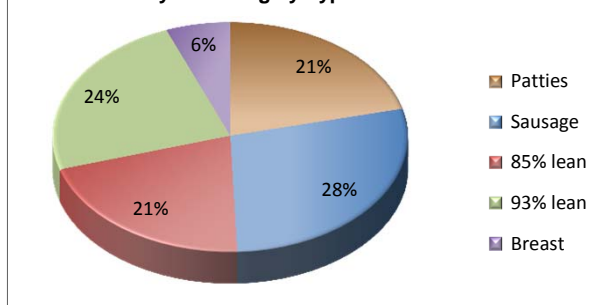
This Week's Turkey Feature Highlights

Retail activity on turkey slows as grocers give more ad space to other proteins to grill for the holiday weekend. A few stores offer fresh whole turkeys. Frozen bone-in breasts increase in availability and price. There is not much interest in rotisserie breasts this week. White parts promotions focus on marinated tenders, a good choice for grilling. Offers on fresh dark parts increase; fewer stores offer smoked dark parts. Retail activity on ground turkey slows. Promotions increase on patties and sausage; prices trend higher. Fewer stores offer 93% lean but it is still the most popular ground item; prices trend sharply higher. This is the week for deli items. Too hot to grill? Sandwiches are a good choice for weekend picnics. Stores increase offers for Categories 1 and 2; Category 3 slows. Processor brand self-service deli is more active; less so for private brands.

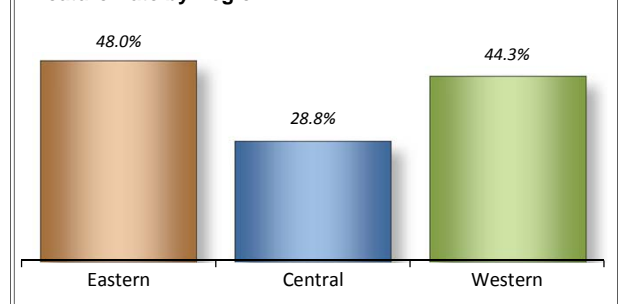
Turkey Promotional Activity by Category



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.

website: www.ams.usda.gov/pymarketnews.htm



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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/}	48.0% of 8,400 sampled outlets 0.2% of stores w/ no-price promotions Activity Index = 8,830			28.8% of 6,400 sampled outlets 4.4% of stores w/ no-price promotions Activity Index = 2,560			44.3% of 4,700 sampled outlets 26.0% of stores w/ no-price promotions Activity Index = 1,510		
	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				1.49 - 1.59	70	1.54
" - Toms							1.49	40	1.49
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57	200	1.57	1.79 - 1.99	270	1.88	1.49 - 1.58	50	1.55
Split, bone-in									
Fresh	2.99	10	2.99						
Rotisserie	6.89 - 8.99	60	7.30						
Boneless, whole									
Cutlets	3.99 - 4.99	290	4.67				4.54	10	4.54
Cutlets, thin sliced	3.99 - 4.99	30	4.35						
Strips							4.54	10	4.54
Tenders	4.99	70	4.99	3.99	10	3.99	3.99	10	3.99
Marinated Tenders	3.73 - 4.26	1,150	3.88	3.19 - 4.99	230	4.32			
Drumsticks							1.79	200	1.79
Thighs							1.79	200	1.79
Wings							1.79	200	1.79
Necks									
Smoked Drumsticks	2.39	40	2.39						
Smoked Wings	2.39	40	2.39						
Smoked Necks	1.59	40	1.59						
GROUND TURKEY:									
Patties	1.99 - 3.79	1,930	2.95	2.49 - 3.50	40	2.83	2.89 - 3.29	70	3.00
Sausage	2.19 - 3.99	1,570	2.91	2.39 - 3.99	1,010	2.84	2.62 - 3.79	130	3.30
85% lean	1.99 - 2.66	1,780	2.40	1.82 - 2.49	200	2.11	1.99	30	1.99
93% lean	2.30 - 3.43	1,240	2.69	1.99 - 3.99	560	2.89	2.63 - 3.19	490	3.08
Breast (99-100% lean)	3.84 - 4.61	370	4.19	3.74 - 4.16	200	4.08			
Rolls (frsh/frz 1 lb.)				1.49 - 1.50	40	1.49			
Specialty ^{3/}									
Patties							4.99	10	4.99
93-94% lean				3.00	20	3.00			
Breast	4.99 - 5.49	230	5.48						



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jul 01, 2011

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

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

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)			
	81.1% of 19,500 stores		70.3% of 19,500 stores		87.7% of 8,400 sampled outlets Activity Index = 23,350				73.6% of 6,400 sampled outlets Activity Index = 15,120				79.6% of 4,700 sampled outlets Activity Index = 10,770			
Activity Index ^{2/}	49,240		39,280		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	5,610	7.88	4,030	7.77	5.49 - 8.99	4,240	8.00	5.99 - 9.99	770	7.24	5.97 - 12.99	600	7.86			
Private Brand	4,420	7.41	2,150	7.39	6.49 - 8.99	3,070	7.27	6.99 - 8.99	1,220	7.64	8.49	130	8.49			
Category 2																
Processor Brand	6,600	5.74	5,900	5.80	4.99 - 7.99	3,660	5.71	4.49 - 6.99	1,980	5.88	4.99 - 5.99	960	5.53			
Private Brand	3,390	6.33	3,720	6.32	4.99 - 5.99	760	5.74	4.99 - 6.99	1,720	6.04	5.99 - 8.99	910	7.39			
Category 3																
Processor Brand	1,190	4.41	1,200	3.56	2.97 - 5.99	280	4.23	2.98 - 3.99	320	3.72	2.98 - 4.99	590	4.87			
Private Brand	220	5.44	940	5.14	3.99 - 4.98	80	4.47				5.99	140	5.99			
Turkey Ham																
Processor Brand	230	4.35	320	3.15	2.99 - 5.49	160	4.91	3.38 - 3.99	20	3.66	2.48 - 2.99	50	2.85			
Private Brand																
Turkey Pastrami																
Processor Brand	280	4.41	150	3.75	3.59 - 6.49	270	4.43	3.99	10	3.99						
Private Brand																
SERVICE DELI - Chicken																
Category 1																
Processor Brand	3,590	7.47	2,020	7.34	4.99 - 8.99	2,220	7.64	5.98 - 8.99	1,030	6.92	7.99 - 10.99	340	8.08			
Private Brand	3,070	7.33	1,720	6.73	6.99 - 7.69	1,330	7.09	6.49 - 7.99	720	7.24	6.99 - 7.99	1,020	7.71			
Category 2																
Processor Brand	610	6.33	780	6.15				4.98 - 6.99	250	6.85	4.99 - 5.99	360	5.96			
Private Brand	1,600	5.24	240	5.49	4.88	1,090	4.88	4.88 - 6.99	510	6.01						
SELF-SERVICE DELI																
(dollars per tub or pouch)																
Turkey 7-10 oz																
Processor Brand	8,740	3.34	7,780	3.20	2.50 - 3.99	3,010	3.35	2.49 - 3.99	3,140	3.18	2.39 - 3.99	2,590	3.50			
Private Brand	840	3.35	1,320	3.01	2.50 - 3.49	380	3.00	3.00 - 3.50	220	3.24	3.99	240	3.99			
Turkey 16 oz																
Processor Brand	60	5.66	250	5.96	5.99	30	5.99	5.50	20	5.50	4.99	10	4.99			
Private Brand																
Chicken 7-10 oz																
Processor Brand	8,040	3.36	5,600	3.29	2.50 - 3.99	2,480	3.39	2.49 - 3.99	2,970	3.20	2.39 - 3.99	2,590	3.50			
Private Brand	750	3.44	1,160	2.96	3.00 - 3.49	290	3.14	3.00 - 3.50	220	3.24	3.99	240	3.99			

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)