USDA Weekly Retail Turkey Feature Activity

Fri. Sep 30, 2011

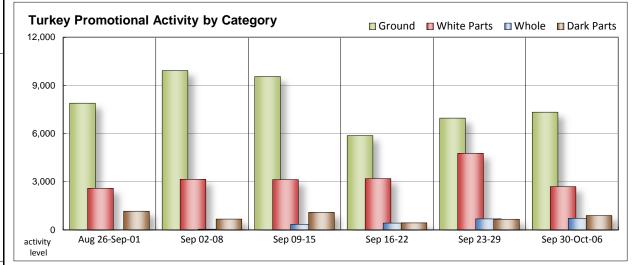
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/30 thru 10/06.

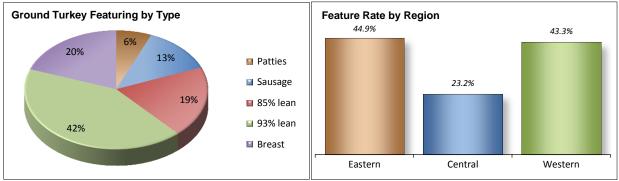
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(pri	ces in do	llars per p	oound fre	esh unless	otherwis	se noted;	
	NAT	ONAL S	UMMAI	RY			
	THIS	WEEK	LAST	WEEK	LAST YEAR		
Feature Rate 1/		of 19,500 tlets		of 19,500 tlets	44.0% of 19,200 outlets		
Special Rate 4/	2.	0%	3.	9%	8.9%		
Activity Index 2/		,560		,650		740	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	
WHOLE BIRDS:							
Fresh - Hens	230	1.74	480		40	1.42	
" - Toms	230		160		20	1.34	
Frozen - Hens	240	_	20		240	0.84	
" - Toms PARTS:	10	1.39	20	1.34	220	0.81	
Breast:							
Bone-in, whole							
Fresh	720	2.59	420	2.84	30	2.89	
Frozen	640	1.67	930	-	1,240	1.68	
Split, bone-in	040	1.07	330	1.03	1,240	1.00	
Fresh			10	2.99			
Rotisserie	390	7.29	680		400	7.75	
Boneless, whole	40		620		50	4.39	
Cutlets	880	4.68	860		720	3.97	
Cutlets, thin sliced	20	5.36	620		. 20	0.01	
Strips	20	0.00	020	4.00	220	3.78	
Tenders			620	4.00	380	3.87	
Marinated Tenders	290	4.22	650		250	4.51	
Drumsticks	420		120		250	1.59	
Thighs	40	2.07	120	1.77	90	2.06	
Wings	320	1.82	10	1.49	250	1.45	
Necks	10		10				
Smoked Drumsticks	10	1.79	170	-	270	1.88	
Smoked Wings	90	2.17	170		270	1.93	
Smoked Necks			180		60	2.14	
GROUND TURKEY:	7,330	3.02	6,960	3.05	10,160	2.70	
Patties	460	3.03	390		870	2.59	
Sausage	930	3.06	1,160	3.13	2,960	2.67	
85% lean	1,420	2.31	1,280	2.34	1,770	1.92	
93% lean	3,090	2.82	2,860	2.86	3,310	2.57	
Breast	1,430	4.13	1,270	4.08	1,250	4.34	
Rolls (frsh/frz 1 lb.)	30	1.83	410	2.22	580	1.66	
Specialty 5/							
Patties	140	4.07		_			
93-94% lean	310	4.55	140	3.49	230	4.27	
Breast	170	6.26			50	5.04	

This Week's Turkey Feature Highlights First of the month feature activity slows. Offers decrease on frozen whole turkeys, increase on fresh. Kosher whole turkeys continue to be heavily promoted, but they won't be around much longer. Retailers move their focus on bone-in breasts from frozen to fresh; prices trend higher on frozen, lower on fresh. Interest in rotisserie breasts continues to decline. Promotions all but disappear for boneless whole breast, thin sliced cutlets and tenders. Cutlets are slightly more available; fewer stores feature marinated tenders. Dark parts are most active on fresh drums and wings. More ground turkey is featured this week. Offers retreat on patties and sausage, increase on the balance of grinds. Prices trend lower everything except ground breast. There isn't as much interest in deli items this week. Activity slows on all service deli

Categories, both on processor brands and private brands. Self-service deli is less active on processor brands, more active on private.





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 <u>any</u> 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.

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



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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/30 thru 10/06.

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

	EAST	ERN U.S.			CEN	TRAL U.S.		WES	TERN U.S.			
	(CT,DC,DE,F	L,GA,MA,MD,ME	,	(A	L,AR,IA,IL,	N,KS,KY,LA,MI,	MN,	(AZ,CA,CO,ID,MT,				
	NC,NH,NJ,NY,F	PA,RI,SC,VA,VT,V	VV)	MO,I	MS,ND,NE,	OH, OK,SD,TN,	TX,WI)	NM,NV,C	NM,NV,OR,UT,WA,WY)			
Feature Rate 1/		0 sampled outle		1		00 sampled out	. ,		00 sampled outle	ets		
Special Rate 4/	1.6% of stores w	•			•	// no-price pron		5.1% of stores w/ no-price promotions Activity Index = 2,270				
Activity Index 2/		Index = 7,520	7.110113	0.270		Index = 2,150	iotions					
,,	Price Range	Summary		Price	Price Range		ary	Price Range	Summary			
	(\$/pound)		Vtd Avg		ound)	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg			
WHOLE BIRDS:												
Fresh - Hens	1.59 - 1.79	200	1.75		1.49	10	1.49	1.79	20	1.79		
" - Toms	1.59 - 1.79	200	1.75		1.49	10	1.49	1.79	20	1.79		
Frozen - Hens	1.39	10	1.39		1.19	230	1.19					
" - Toms	1.39	10	1.39									
PARTS:												
Breast:												
Bone-in, whole												
Fresh	2.49 - 2.99	720	2.59									
Frozen	1.27 - 1.99	110	1.70	0.99	- 1.99	480	1.65	1.39 - 1.99	50	1.75		
Split, bone-in												
Fresh												
Rotisserie	6.89 - 8.99	160	7.72		6.99	20	6.99	6.99	210	6.99		
Boneless, whole	4.79 - 5.49	40	4.99									
Cutlets	3.99 - 4.99	650	4.84	3.49	- 4.99	60	4.79	3.99	170	3.99		
Cutlets, thin sliced	4.99 - 5.99	20	5.36									
Strips												
Tenders												
Marinated Tenders	4.26	260	4.26		4.66	10	4.66	3.33 - 3.66	20	3.51		
Drumsticks	1.49 - 2.49	390	1.82	1.28	- 1.59	30	1.39					
Thighs	2.29	30	2.29		1.39	10	1.39					
Wings	1.49 - 2.49	290	1.87	1.28	- 1.59	30	1.39					
Necks					1.39	10	1.39					
Smoked Drumsticks					1.79	10	1.79					
Smoked Wings	1.69 - 2.29	80	2.22		1.79	10	1.79					
Smoked Necks												
GROUND TURKEY:												
Patties	2.99 - 3.50	280	3.10		2.50	30	2.50	3.00	150	3.00		
Sausage	2.45 - 3.99	640	3.19	2.45		290	2.75					
85% lean	1.79 - 3.00	1,210	2.28	2.00		30	2.03	2.40 - 2.66	180	2.59		
93% lean	2.49 - 3.19	1,180	2.72	2.08		850	2.89	2.40 - 3.19	1,060	2.87		
Breast (99-100% lean)	3.08 - 4.99	1,020	4.20		3.08	20	3.08	3.99	390	3.99		
Rolls (frsh/frz 1 lb.)	1.99	20	1.99		1.50	10	1.50					
Specialty ^{5/}	4.00	400	4.00					4.00	1.5	4.00		
Patties	4.00	130	4.00	2.22	4.70	4.4-	4.70	4.99	10	4.99		
93-94% lean	2.99 - 4.79	170	4.44	3.99	4.79	140	4.70					
Breast	5.49 - 6.49	170	6.26					ĺ				



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Sep 30, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/30 thru 10/06.

(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,			(AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,			(AZ,CA,CO,ID,MT,			
71		f 19,500	81.6% o	f 19,500	NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)			MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)			NM,NV,O	NM,NV,OR,UT,WA,WY)		
Feature Rate 1/ Activity Index 2/	stores stores 38,410 48,840		res	79.6% of 8,400 sampled outlets Activity Index = 20,450			69.6% of 6,400 sampled outlets Activity Index = 12,300			58.6% of 4,700 sampled outlets				
			40.040							Activity Index = 5,660				
			48,840				mary	Price Range	Summary		Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores V	Vtd Avg	
SERVICE DELI - Turkey														
Category 1														
Processor Brand	,	7.82	5,720	7.85	5.98 - 9.99	2,320	7.94	5.99 - 8.99	1,290	7.51	6.99 - 9.99	420	8.07	
Private Brand	2,030	7.90	4,140	7.56	6.99 - 8.99	1,880	7.86	7.99	20	7.99	8.49	130	8.49	
Category 2														
Processor Brand	-,	5.72	7,310	6.06	4.97 - 6.99	2,300	5.66	4.49 - 7.49	2,000	5.69	4.49 - 6.99	750	5.96	
Private Brand	3,230	6.30	5,290	6.39	4.99 - 6.99	1,620	6.19	4.69 - 6.99	1,250	6.23	4.69 - 8.99	360	7.02	
Category 3														
Processor Brand	960	4.14	950	3.92	3.50 - 4.99	320	4.62	2.97 - 4.29	610	3.79	5.99	30	5.99	
Private Brand	220	4.64	880	5.28	3.99 - 4.99	70	4.44	2.98 - 4.99	150	4.74				
Turkey Ham	200	0.40	120	2.20	0.00 0.00	250	2.00	2.69	40	0.00	0.40 0.50	20	0.00	
Processor Brand Private Brand	380 20	3.16 3.79	120	3.30	2.68 - 3.99 3.79	350 20	3.22 3.79	2.69	10	2.69	2.19 - 2.59	20	2.32	
Turkey Pastrami	20	3.79			3.79	20	3.79							
Processor Brand	000	4.50	400	0.75	2.00 4.00	200	4.00	2.00	20	7.50	2.00	40	2.00	
	260	4.56	430	3.75	3.99 - 4.99	200	4.36	3.99 - 9.99	20	7.59	3.99	40	3.99	
Private Brand			60	3.77										
SERVICE DELI - Chicken														
Category 1	0.700	7.00	0.050	7.50	5.00 0.40	4 000	7.00	400 700	000	0.00	0.40	100	0.00	
Processor Brand	, -	7.62	3,250	7.52	5.88 - 9.49	1,660	7.90	4.99 - 7.99	930	6.89	8.49 - 9.99	130	9.28	
Private Brand	890	7.22	1,680	7.00	6.99 - 7.99	590	7.35	5.99 - 6.99	300	6.96				
Category 2 Processor Brand	250	4.79	180	4.88				2.99 - 6.99	250	4.79				
	250	4.79	180	4.00				2.99 - 6.99	250	4.79				
Private Brand SELF-SERVICE DELI				-										
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	8,290	3.20	8,980	3.09	2.00 - 4.00	4,030	3.28	1.69 - 3.99	2,510	2.85	1.99 - 3.99	1,750	3.52	
Private Brand		2.86	1,020	3.21	2.50 - 3.50	1,300	2.94	2.38 - 3.29	520	2.64	2.99	140	2.99	
Turkey 16 oz	1,000	2.50	1,020	0.21	2.00 0.00	1,000	2.0 .	2.00 0.20	020	2.01	2.55	1.3	2.00	
Processor Brand	50	5.09	450	6.06	4.99 - 5.97	30	5.50	4.48	20	4.48				
Private Brand										-				
Chicken 7-10 oz														
Processor Brand	6,830	3.20	7,460	3.10	2.50 - 4.00	3,150	3.24	1.69 - 3.99	1,930	2.84	1.99 - 3.99	1,750	3.52	
Private Brand	1,240	2.80	920	3.23	2.50 - 3.50	610	2.87	2.50 - 3.29	490	2.66	2.99	140	2.99	

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)