



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/28 thru 11/03.

Fri. Oct 28, 2011

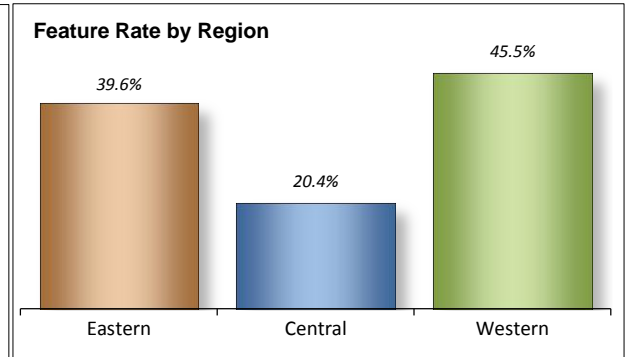
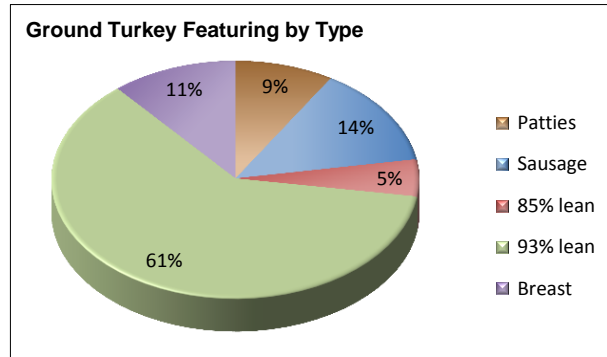
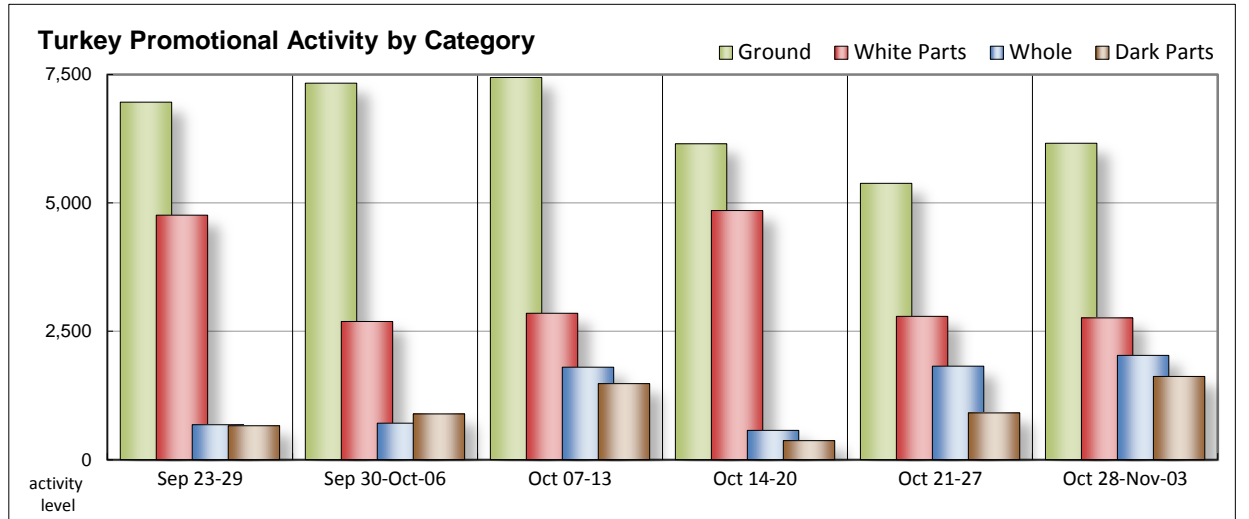
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	34.7% of 19,500 outlets		35.7% of 19,500 outlets		45.3% of 19,200 outlets	
Special Rate ^{4/}	1.3%		0.9%		1.6%	
Activity Index ^{2/}	13,280		13,370		13,650	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	910	1.05	910	0.74	1,340	0.73
" - Toms	1,120	1.01	910	0.72	1,260	0.77
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	2.99			140	2.32
Frozen	500	1.79	610	1.75	1,440	1.59
Split, bone-in						
Fresh			170	2.71	20	2.99
Rotisserie	1,660	8.10	340	7.45	220	8.42
Boneless, whole			190	4.03	180	3.99
Cutlets	410	4.99	1,090	4.60	750	4.29
Cutlets, thin sliced	140	5.99			130	4.96
Strips						
Tenders	40	4.86	390	4.45	300	4.15
Marinated Tenders	250	3.99	1,040	3.98	580	3.74
Drumsticks	750	1.89	330	1.63	270	1.49
Thighs			40	2.19	180	1.46
Wings	750	1.89	350	1.56	300	1.47
Necks	30	1.39	90	1.46	40	1.49
Smoked Drumsticks	40	1.92	50	2.89	140	1.29
Smoked Wings	40	1.92	40	1.92	140	1.29
Smoked Necks	10	1.69	10	1.59		
GROUND TURKEY:	6,160	3.19	5,380	3.61	6,020	2.84
Patties	540	3.35	230	3.36	430	2.95
Sausage	840	3.27	900	3.42	1,790	2.75
85% lean	310	2.12	610	2.38	860	2.02
93% lean	3,780	3.00	1,860	3.06	2,090	2.76
Breast	690	4.51	1,780	4.74	850	3.99
Rolls (frsh/frz 1 lb.)	100	1.73	50	1.40	200	1.96
Specialty ^{5/}						
Patties			50	3.99	10	3.99
93-94% lean	320	3.69	1,100	3.90	740	3.24
Breast	40	5.51	230	7.45	60	5.47

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

This Week's Turkey Feature Highlights

Retail activity is similar to last week's level. More stores are bringing out their purchase-based promotions for Thanksgiving. Offers increase on frozen whole turkeys; the averaged advertised price is sharply higher. Fewer bone-in breasts are featured; prices trend higher. This week rotisserie breasts are very active due to heavy promotional activity in the Western region. Cutlets, tenders and marinated tenders are less available; prices trend higher. Fresh drums and wings are heavily promoted in the Eastern region. Offers on ground turkey increase; the weighted average price is lower. The 93% lean accounts for most of the ground turkey; prices are lower on all grinds. Deli activity rebounds from last week's low levels. Category 1 and Category 2 are more active, Category 3 is less active. Many stores are promoting their Category 2 private brands. Self-service deli is more available. Offers increase on private brands, slow on packer brands.



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/}	39.6% of 8,400 sampled outlets			20.4% of 6,400 sampled outlets			45.5% of 4,700 sampled outlets		
Special Rate ^{4/}	0.5% of stores w/ no-price promotions			2.9% of stores w/ no-price promotions			0.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,770			Activity Index = 2,340			Activity Index = 3,810		
	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	0.79 - 1.39	290	1.13	0.59 - 1.99	370	0.91	0.59 - 1.69	250	1.16
" - Toms	0.79 - 1.69	500	1.00	0.59 - 1.99	370	0.91	0.59 - 1.69	250	1.16
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	10	2.99						
Frozen	0.98 - 1.99	170	1.93	0.99 - 1.79	190	1.68	1.59 - 1.98	140	1.78
Split, bone-in									
Fresh									
Rotisserie	6.89 - 9.99	450	8.43	6.99 - 7.99	130	7.90	7.99	1,080	7.99
Boneless, whole									
Cutlets									
	4.99	390	4.99	4.99	20	4.99			
Cutlets, thin sliced									
	5.99	140	5.99						
Strips									
Tenders									
	5.99	10	5.99	4.39 - 4.68	30	4.48			
Marinated Tenders									
	3.73	180	3.73	4.26 - 4.99	30	4.67	4.66	40	4.66
Drumsticks									
	1.39 - 1.99	740	1.90	1.39	10	1.39			
Thighs									
Wings									
	1.39 - 1.99	740	1.90	1.39	10	1.39			
Necks									
	1.39	20	1.39	1.39	10	1.39			
Smoked Drumsticks									
	1.99	30	1.99	1.69	10	1.69			
Smoked Wings									
	1.99	30	1.99	1.69	10	1.69			
Smoked Necks									
	1.69	10	1.69						
GROUND TURKEY:									
Patties									
	3.00 - 3.19	150	3.17	2.79 - 3.00	50	2.90	3.29 - 3.50	340	3.49
Sausage									
	2.39 - 3.99	590	3.29	2.79 - 3.50	230	3.23	3.27	20	3.27
85% lean									
	1.98 - 2.83	280	2.14	2.15	10	2.15	1.50 - 1.99	20	1.81
93% lean									
	2.39 - 3.67	1,440	2.89	2.39 - 3.49	720	3.08	2.39 - 3.19	1,620	3.05
Breast (99-100% lean)									
	4.61 - 5.22	590	4.64	3.27	70	3.27	4.99	30	4.99
Rolls (frsh/frz 1 lb.)									
	1.25	10	1.25	1.38 - 2.19	70	1.90	1.25 - 1.69	20	1.39
Specialty ^{5/}									
Patties									
93-94% lean									
	3.50 - 4.00	310	3.71	3.29	10	3.29			
Breast									
	5.49	20	5.49				4.99 - 5.99	20	5.52



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Oct 28, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/28 thru 11/03.

(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/}	81.2% of 19,500 stores		66.2% of 19,500 stores		89.9% of 8,400 sampled outlets			77.2% of 6,400 sampled outlets			71.2% of 4,700 sampled outlets		
Activity Index ^{2/}	46,680		33,310		Activity Index = 21,540			Activity Index = 14,060			Activity Index = 11,080		
	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	6,820	8.01	3,740	7.88	5.29 - 9.99	3,440	8.26	4.98 - 9.99	2,090	7.73	6.99 - 9.99	1,290	7.83
Private Brand	1,320	7.71	1,870	7.54	6.99 - 9.99	820	7.55	7.49	250	7.49	8.49	250	8.49
Category 2													
Processor Brand	4,850	5.74	4,120	6.11	4.69 - 6.99	2,070	5.76	4.49 - 7.49	2,030	5.94	4.59 - 5.99	750	5.17
Private Brand	6,370	6.76	2,950	6.34	4.97 - 7.99	2,520	6.69	4.99 - 6.99	1,010	6.26	5.99 - 7.99	2,840	6.99
Category 3													
Processor Brand	660	4.03	1,660	3.70	3.97 - 4.99	250	4.33	2.99 - 3.99	370	3.83	3.99	40	3.99
Private Brand	1,490	5.74	1,430	5.38	3.99 - 5.99	310	5.31	4.98 - 5.99	90	5.87	4.99 - 5.99	1,090	5.86
Turkey Ham													
Processor Brand	310	3.42	410	2.88	2.89 - 4.49	230	3.49	2.98 - 4.69	60	3.50	2.39 - 2.59	20	2.45
Private Brand	120	4.99						4.99	120	4.99			
Turkey Pastrami													
Processor Brand	300	3.86	260	4.90	3.59 - 4.49	240	3.91	2.98 - 4.69	60	3.65			
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	5,330	7.61	3,230	7.76	4.99 - 9.49	3,120	8.04	4.98 - 8.99	1,430	7.42	5.99 - 9.99	780	6.22
Private Brand	2,030	7.03	1,100	7.02	6.99 - 7.99	990	7.32	5.99 - 6.99	800	6.69	6.99	240	6.99
Category 2													
Processor Brand	10	4.99	20	5.80				4.99	10	4.99			
Private Brand			520	7.22									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	4,920	3.31	6,170	3.12	2.49 - 4.00	2,480	3.43	1.99 - 3.79	1,430	3.12	2.99 - 3.50	1,010	3.28
Private Brand	3,630	2.96	430	3.20	2.39 - 3.50	1,060	2.99	2.50 - 3.33	1,520	2.92	2.99 - 3.00	1,050	3.00
Turkey 16 oz													
Processor Brand	1,170	4.99	450	4.66	4.99	1,090	4.99	4.99	80	4.99			
Private Brand													
Chicken 7-10 oz													
Processor Brand	4,060	3.27	4,530	3.17	2.49 - 4.00	1,860	3.33	1.99 - 3.79	1,190	3.16	2.99 - 3.50	1,010	3.28
Private Brand	3,290	2.96	420	3.21	2.39 - 3.50	1,060	2.99	2.50 - 3.33	1,520	2.92	3.00	710	3.00

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)