USDA Weekly Retail Turkey Feature Activity

Fri. Nov 11, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/11 thru 11/17.

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

NATIONAL SUMMARY

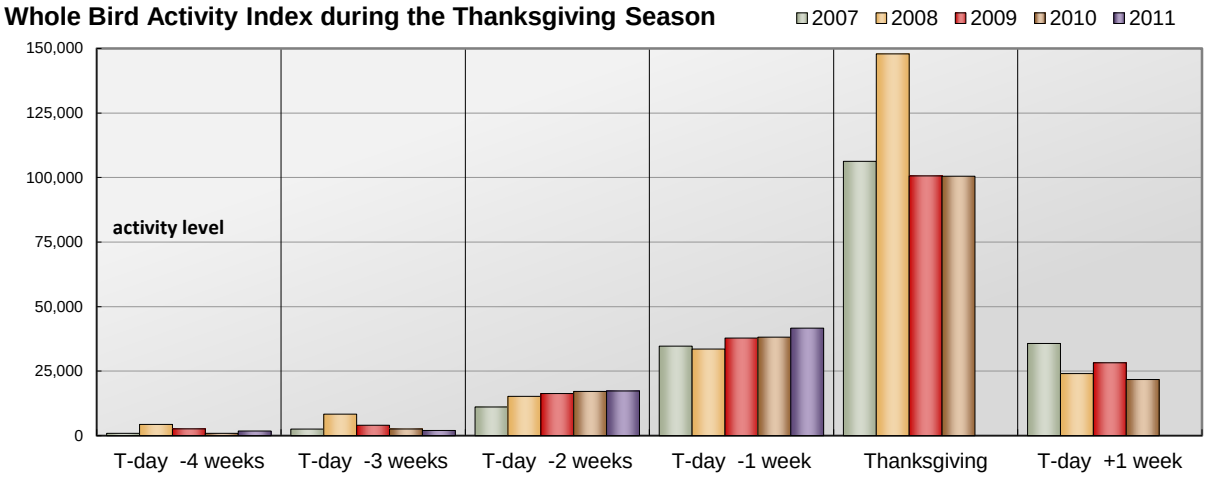
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**74.0% of 19,500 outlets**		**46.5% of 19,500 outlets**		**75.6% of 19,200 outlets**	
Special Rate [4/]	**6.1%**		**11.1%**		**7.7%**	
Activity Index [2/]	**54,430**		**27,510**		**54,730**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens	2,640	1.46			2,990	1.33
" - Toms	2,630	1.46			2,990	1.33
Frozen - Hens	18,220	0.83	8,760	0.85	15,740	0.77
" - Toms	18,170	0.82	8,560	0.83	16,450	0.73
PARTS:						
Breast:						
Bone-in, whole						
Fresh	560	2.90			1,730	2.33
Frozen	4,080	1.85	2,130	1.76	3,930	1.73
Split, bone-in						
Fresh					210	2.77
Rotisserie	470	8.30	300	8.99	650	7.40
Boneless, whole					20	4.99
Cutlets	450	4.60	210	4.67	820	4.20
Cutlets, thin sliced	10	5.99			10	4.99
Strips						
Tenders	40	4.86	260	4.45	700	4.41
Marinated Tenders	150	4.53	730	4.47	720	3.76
Drumsticks	420	1.72	450	1.83	310	1.69
Thighs	270	1.77			40	1.84
Wings	240	1.68	390	1.86	280	1.72
Necks	240	1.73	20	1.24	230	1.77
Smoked Drumsticks	800	2.81	180	2.46	160	1.99
Smoked Wings	730	2.84	250	2.41	160	1.99
Smoked Necks	140	2.29	180	1.88		
GROUND TURKEY:	**3,880**	**3.10**	**4,640**	**3.35**	**6,550**	**2.89**
Patties	430	3.23	790	3.34	490	2.84
Sausage	1,360	3.02	2,140	3.14	1,880	2.78
85% lean	730	2.35	280	2.35	1,060	2.16
93% lean	920	3.29	600	2.94	2,160	2.79
Breast	440	4.08	830	4.51	960	4.15
Rolls (frsh/frz 1 lb.)	130	1.12	60	1.63	20	1.13
Specialty [5/]						
Patties			130	4.00		
93-94% lean	30	3.99	240	4.36	260	3.51
Breast	130	4.00	20	5.49	20	5.99

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

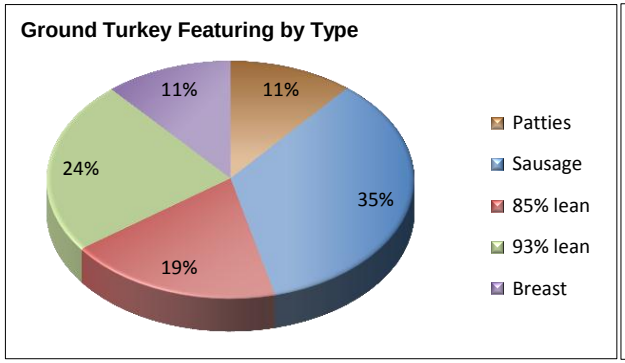
This Week's Turkey Feature Highlights

After today, Thanksgiving is only two weeks away and turkey has begun to push the competition out of the circulars as stores compete for the consumer's dollar. Featuring of frozen whole birds outpaces past years, prices soften only slightly; fresh birds enter the scene more frequently late in the ad cycle as they prepare to take center stage, prices are up considerably from last year. Frozen breasts rise in offer and price; other white parts begin to retreat. Rotisserie breasts remain popular but ad pricing declines. Dark parts are a popular offering this week with all categories well-represented, prices rise. Ads for ground turkey have begun to decline in number and ad price; sausage remains the favorite. Service deli turkey offers moderate in number from last week but ad prices rise across all types; chicken prices decline. Self-service meats hold their pricing but withdraw in numbers. Thanksgiving is almost here and, if retailers have their way, turkeys will be winging their way out of the stores and to the dinner table in record number.

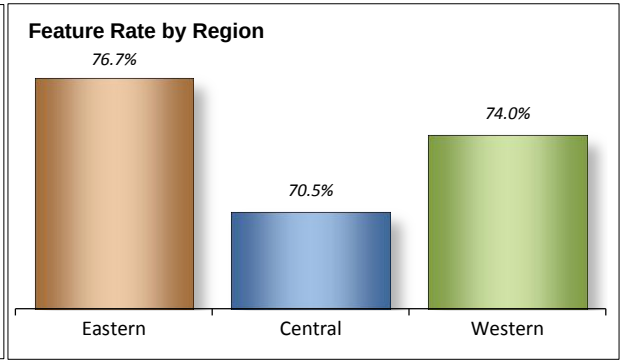
Whole Bird Activity Index during the Thanksgiving Season



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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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/11 thru 11/17.

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

Fri. Nov 11, 2011

	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/]	**76.7% of 8,400 sampled outlets**			**70.5% of 6,400 sampled outlets**			**74.0% of 4,700 sampled outlets**		
Special Rate [4/]	**0.6% of stores w/ no-price promotions**			**5.8% of stores w/ no-price promotions**			**16.4% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 30,260**			**Activity Index = 12,840**			**Activity Index = 11,170**		
	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	0.89 - 1.99	2,210	1.42	1.49 - 1.99	430	1.68			
" - Toms	0.89 - 1.99	2,200	1.42	1.49 - 1.99	430	1.68			
Frozen - Hens	0.29 - 1.69	9,520	0.80	0.35 - 1.59	4,450	0.92	0.49 - 1.69	4,250	0.82
" - Toms	0.29 - 1.69	9,450	0.80	0.35 - 1.59	4,470	0.92	0.49 - 1.69	4,250	0.75
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.29 - 3.49	540	2.87	3.49	20	3.49			
Frozen	1.39 - 2.99	1,800	1.88	1.38 - 1.99	1,420	1.77	1.29 - 2.38	860	1.92
Split, bone-in									
Fresh									
Rotisserie	6.89 - 8.99	190	7.49	6.99	20	6.99	8.99	260	8.99
Boneless, whole									
Cutlets	3.99 - 4.99	420	4.61	3.99	20	3.99	5.45	10	5.45
Cutlets, thin sliced	5.99	10	5.99						
Strips									
Tenders	5.99	10	5.99	3.99	20	3.99	5.45	10	5.45
Marinated Tenders	4.26 - 4.79	110	4.71	4.33	20	4.33	3.73	20	3.73
Drumsticks	1.49 - 1.99	230	1.67	1.59 - 1.79	190	1.78			
Thighs	1.49 - 2.29	80	1.74	1.59 - 1.79	190	1.78			
Wings	1.39 - 1.69	230	1.67	1.79	10	1.79			
Necks	1.49	50	1.49	1.79	190	1.79			
Smoked Drumsticks	2.29 - 2.99	800	2.81						
Smoked Wings	2.29 - 2.99	730	2.84						
Smoked Necks	2.29	140	2.29						
GROUND TURKEY:									
Patties	2.99 - 3.69	180	3.40	3.49 - 3.50	50	3.49	3.00 - 3.29	200	3.02
Sausage	2.39 - 3.69	850	2.96	2.86 - 3.84	140	3.53	2.46 - 3.79	370	2.96
85% lean	1.49 - 2.68	240	2.43	1.79 - 2.79	260	2.22	2.39 - 2.50	230	2.41
93% lean	2.48 - 3.07	140	2.89	2.80 - 3.19	200	2.87	2.63 - 3.99	580	3.53
Breast (99-100% lean)	5.20	120	5.20	3.99	190	3.99	2.99 - 3.19	130	3.18
Rolls (frsh/frz 1 lb.)	0.99	10	0.99	0.99 - 2.25	120	1.14			
Specialty [5/]									
Patties									
93-94% lean				3.99	20	3.99	3.99	10	3.99
Breast	4.00	130	4.00						

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 11, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/11 thru 11/17.

(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/	67.6% of 19,500 stores		81.6% of 19,500 stores		74.0% of 8,400 sampled outlets			60.3% of 6,400 sampled outlets			66.1% of 4,700 sampled outlets		
Activity Index 2/	40,200		46,770		Activity Index = 20,200			Activity Index = 11,510			Activity Index = 8,490		
					Price Range	Summary		Price Range	Summary		Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg	($/pound)	Stores	Wtd Avg
SERVICE DELI - Turkey													
Category 1													
Processor Brand	4,730	8.50	5,150	8.12	5.96 - 10.99	4,030	8.48	5.69 - 10.99	590	8.46	8.49 - 9.49	110	9.24
Private Brand	1,280	7.52	1,980	7.27	6.99 - 7.99	1,030	7.49	7.49 - 8.49	250	7.65			
Category 2													
Processor Brand	4,100	6.19	4,370	5.92	4.99 - 7.99	2,180	6.40	4.98 - 6.99	1,220	6.01	4.98 - 6.99	700	5.86
Private Brand	2,960	6.41	3,780	5.72	3.99 - 6.99	1,350	6.68	4.49 - 6.99	1,390	6.16	5.99 - 6.38	220	6.32
Category 3													
Processor Brand	800	4.39	1,590	4.12	2.99 - 5.99	470	4.67	2.98 - 5.99	320	4.02	2.99	10	2.99
Private Brand	330	4.76	150	4.98	3.98 - 4.99	300	4.79	3.49 - 4.99	30	4.46			
Turkey Ham													
Processor Brand	260	2.60	140	2.76	2.19 - 4.99	160	2.83	2.29 - 2.49	20	2.43	1.99 - 2.49	80	2.19
Private Brand			20	4.99									
Turkey Pastrami													
Processor Brand	230	4.92	440	3.75	3.59 - 6.99	180	5.18	3.99	10	3.99	3.99	40	3.99
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,950	7.05	3,200	7.44	5.99 - 9.99	1,810	7.55	4.98 - 7.99	710	6.13	5.99 - 8.99	430	6.47
Private Brand	1,350	7.07	610	6.62	5.99 - 7.99	1,130	7.07	6.99 - 7.49	220	7.04			
Category 2													
Processor Brand	10	4.98	1,840	6.62				4.98	10	4.98			
Private Brand	390	5.67						4.99	200	4.99	6.38	190	6.38
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	8,600	3.11	11,170	3.11	2.49 - 3.69	2,610	3.13	1.98 - 3.79	3,130	3.02	2.50 - 3.98	2,860	3.18
Private Brand	2,720	3.85	660	2.94	2.68 - 4.99	1,910	4.13	2.50 - 3.50	290	3.17	2.50 - 3.99	520	3.19
Turkey 16 oz													
Processor Brand	580	5.12	480	4.73	4.99	380	4.99	4.99 - 5.98	190	5.38	4.99	10	4.99
Private Brand													
Chicken 7-10 oz													
Processor Brand	7,850	3.09	10,530	3.11	2.49 - 3.69	2,410	3.16	1.98 - 3.50	2,640	2.94	2.50 - 3.98	2,800	3.18
Private Brand	1,060	3.13	660	2.95	2.68 - 2.99	250	2.97	2.50 - 3.50	290	3.17	2.50 - 3.99	520	3.19

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 Thanksgiving will be available on November 25, 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