USDA Weekly Retail Turkey Feature Activity

Fri. Nov 25, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/25 thru 12/01.

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

NATIONAL SUMMARY

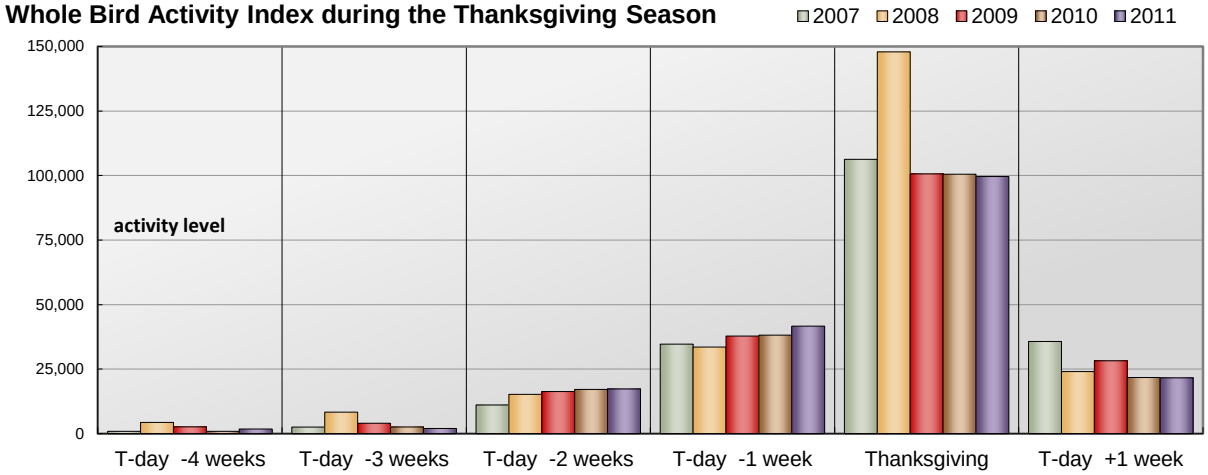
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**28.1% of 19,500 outlets**		**93.2% of 19,500 outlets**		**29.0% of 19,200 outlets**	
Special Rate [4/]	**2.6%**		**6.4%**		**2.5%**	
Activity Index [2/]	**28,250**		**124,280**		**31,370**	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	5,010	1.54	17,930	1.56	4,780	1.38
" - Toms	4,980	1.54	17,850	1.55	4,650	1.38
Frozen - Hens	5,930	0.85	31,690	0.89	6,290	0.84
" - Toms	5,700	0.85	32,130	0.88	6,040	0.85
PARTS:						
Breast:						
Bone-in, whole						
Fresh	1,470	2.75	3,110	2.70	1,500	2.53
Frozen	2,810	1.80	11,400	1.85	3,290	1.56
Split, bone-in						
Fresh			20	1.99		
Rotisserie	640	7.99	2,620	8.69	600	8.25
Boneless, whole					220	4.16
Cutlets	330	4.90	430	4.82	660	4.44
Cutlets, thin sliced						
Strips						
Tenders			10	4.79	190	4.04
Marinated Tenders	220	4.19			60	4.26
Drumsticks	120	1.96	1,300	2.16	80	1.72
Thighs			20	1.79		
Wings	120	1.96	1,310	2.15	180	1.60
Necks	60	1.25	570	1.74	100	1.49
Smoked Drumsticks	20	2.50	340	2.38	200	2.50
Smoked Wings	20	2.50	340	2.38	30	1.68
Smoked Necks	30	2.26	330	2.14		
GROUND TURKEY:	**790**	**3.03**	**2,170**	**3.75**	**2,410**	**3.16**
Patties	10	3.99			260	2.82
Sausage	410	3.26	80	3.52	590	2.91
85% lean	270	2.37	310	2.74	600	2.19
93% lean	80	3.08	1,050	3.39	280	3.03
Breast	20	6.36	730	4.74	680	4.43
Rolls (frsh/frz 1 lb.)			200	1.25	90	2.50
Specialty [5/]						
Patties					50	4.99
93-94% lean			510	3.72	40	3.70
Breast						

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

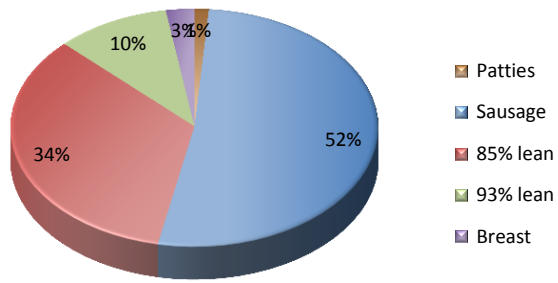
This Week's Turkey Feature Highlights

Retail activity is winding down and ads breaking later in the cycle have fewer turkey promotions. Some stores adjust ad cycles due to the holiday. Offers on whole turkeys are sharply lower than last week, but similar to the same week a year ago. Compared to a year ago, prices are higher on fresh, about the same on frozen. Fewer stores offers bone-in breasts compared to last week; prices trend higher on fresh, lower on frozen. Rotisserie breasts are less active; prices are lower. Promotions on boneless white parts are hard to find and dark parts activty is light. Interest on ground turkey is lacking; most promotions center on sausage and 85% lean. Service deli is less active and prices are mixed. Retailers give little space to self-service deli; prices are lower on most items. Next week retailers will focus on alternative proteins. It is only a few weeks until the next round of holiday promotions.

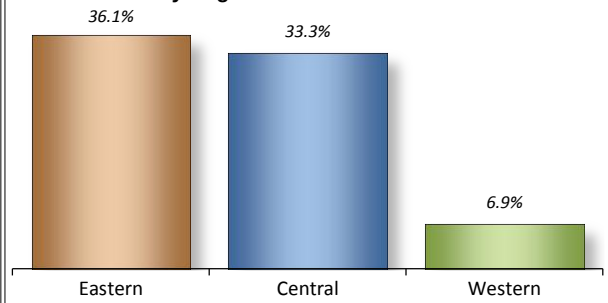
Whole Bird Activity Index during the Thanksgiving Season



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

Fri. Nov 25, 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/]	**36.1% of 8,400 sampled outlets**			**33.3% of 6,400 sampled outlets**			**6.9% of 4,700 sampled outlets**		
Special Rate [4/]	**0.3% of stores w/ no-price promotions**			**5.1% of stores w/ no-price promotions**			**3.3% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 15,980**			**Activity Index = 11,660**			**Activity Index = 610**		
	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	2,910	1.47	0.98 - 1.99	2,050	1.63	1.59 - 1.69	50	1.60
" - Toms	0.89 - 1.99	2,900	1.47	0.98 - 1.99	2,030	1.63	1.59 - 1.69	50	1.60
Frozen - Hens	0.37 - 1.69	3,260	0.83	0.48 - 1.79	2,530	0.87	0.59 - 0.97	140	0.81
" - Toms	0.37 - 1.69	3,070	0.84	0.48 - 1.79	2,490	0.87	0.59 - 0.97	140	0.81
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.19 - 3.29	840	2.76	2.49 - 2.99	510	2.75	2.59	120	2.59
Frozen	0.99 - 2.99	1,100	1.94	0.99 - 2.79	1,630	1.73	0.99 - 1.49	80	1.15
Split, bone-in									
Fresh									
Rotisserie	6.90 - 8.99	380	8.22	5.99 - 7.99	230	7.48	8.99	30	8.99
Boneless, whole									
Cutlets	3.99 - 4.99	320	4.92	3.99	10	3.99			
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.73 - 4.26	220	4.19						
Drumsticks	1.99	100	1.99	1.79	20	1.79			
Thighs									
Wings	1.99	100	1.99	1.79	20	1.79			
Necks	0.98	40	0.98	1.79	20	1.79			
Smoked Drumsticks				2.50	20	2.50			
Smoked Wings				2.50	20	2.50			
Smoked Necks				1.69 - 2.50	30	2.26			
GROUND TURKEY:									
Patties	3.99	10	3.99						
Sausage	2.99 - 3.99	390	3.29	2.86	20	2.86			
85% lean	1.59 - 2.50	270	2.37						
93% lean	3.04 - 3.49	50	3.28	2.68 - 2.79	30	2.74			
Breast (99-100% lean)	5.38 - 6.99	20	6.36						
Rolls (frsh/frz 1 lb.)									
Specialty [5/]									
Patties									
93-94% lean									
Breast									

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 25, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/25 thru 12/01.

(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/	27.8% of 19,500 stores		74.9% of 19,500 stores		43.3% of 8,400 sampled outlets			23.4% of 6,400 sampled outlets			6.2% of 4,700 sampled outlets		
Activity Index 2/	13,660		33,760		Activity Index = 10,870			Activity Index = 2,380			Activity Index = 410		
	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	980	8.12	5,100	7.69	6.49 - 9.49	530	8.12	6.99 - 9.49	140	7.79	7.99 - 12.99	310	8.28
Private Brand	1,120	7.28	2,080	7.96	6.29 - 7.99	1,100	7.30	6.59	20	6.59			
Category 2													
Processor Brand	1,730	6.03	4,580	6.17	4.99 - 7.99	1,000	6.37	4.98 - 6.99	730	5.55			
Private Brand	2,240	6.48	2,380	6.12	4.99 - 6.99	2,110	6.51	5.98 - 5.99	130	5.99			
Category 3													
Processor Brand	630	4.48	1,070	4.45	2.97 - 4.99	420	4.74	2.98 - 3.99	210	3.95			
Private Brand	130	4.35	230	4.72	1.98 - 4.99	130	4.35						
Turkey Ham													
Processor Brand	640	3.56	260	3.64	2.49 - 4.99	620	3.59	3.48	10	3.48	2.19	10	2.19
Private Brand													
Turkey Pastrami													
Processor Brand	390	3.57	50	4.69	2.49 - 4.99	370	3.56	3.48 - 3.98	20	3.78			
Private Brand			30	4.44									
SERVICE DELI - Chicken													
Category 1													
Processor Brand	1,750	8.00	2,170	7.24	5.98 - 8.99	1,640	8.06	5.49 - 7.99	100	6.99	9.49	10	9.49
Private Brand	230	7.99	2,560	7.45	7.99	230	7.99						
Category 2													
Processor Brand	40	5.81	1,260	6.44	4.99 - 5.99	30	5.42	6.99	10	6.99			
Private Brand	70	5.99	200	5.49	5.99	70	5.99						
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	1,830	3.08	4,200	3.22	2.50 - 3.99	1,500	3.22	1.99 - 3.50	290	2.33	3.19	40	3.19
Private Brand	60	3.00	920	3.21	3.00	50	3.00	2.99	10	2.99			
Turkey 16 oz													
Processor Brand	540	4.98	1,670	4.97	4.99	120	4.99	3.99 - 5.29	420	4.98			
Private Brand													
Chicken 7-10 oz													
Processor Brand	1,220	3.11	4,080	3.23	2.50 - 3.99	900	3.37	1.99 - 3.50	280	2.28	3.19	40	3.19
Private Brand	60	3.00	920	3.21	3.00	50	3.00	2.99	10	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)

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