USDA Weekly Retail Turkey Feature Activity

Fri. Dec 02, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/02 thru 12/08.

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

NATIONAL SUMMARY

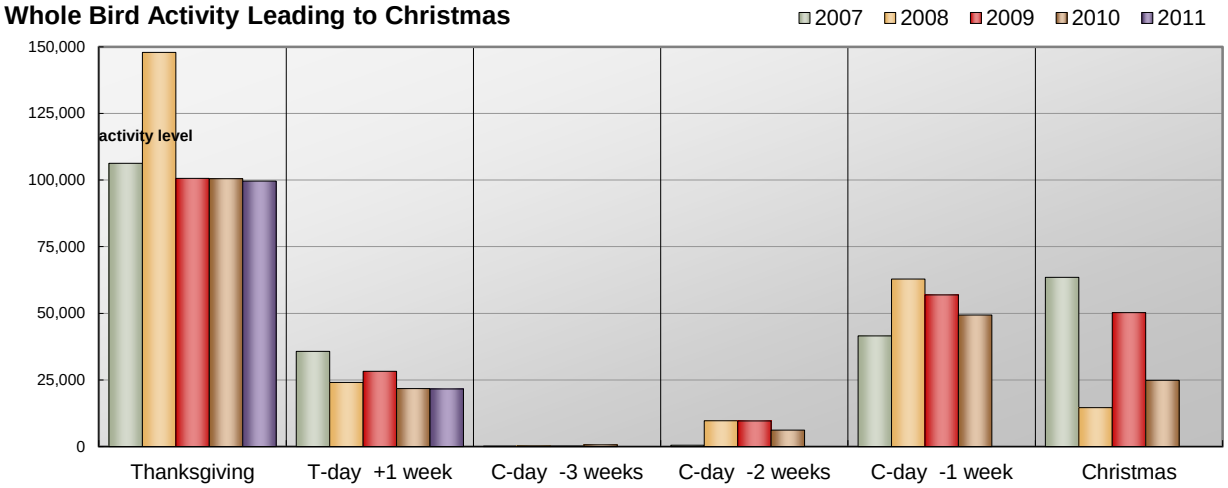
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**20.1% of 19,500 outlets**		**28.1% of 19,500 outlets**		**40.8% of 19,200 outlets**	
Special Rate [4/]	**0.0%**		**2.6%**		**4.7%**	
Activity Index [2/]	**5,420**		**28,250**		**11,080**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens	10	1.39	5,010	1.54		
" - Toms			4,980	1.54		
Frozen - Hens	190	1.09	5,930	0.85	330	0.94
" - Toms	190	1.09	5,700	0.85	320	0.93
PARTS:						
Breast:						
Bone-in, whole						
Fresh			1,470	2.75		
Frozen	30	1.79	2,810	1.80	290	1.79
Split, bone-in						
Fresh	10	2.89			10	2.89
Rotisserie	210	7.62	640	7.99	510	8.01
Boneless, whole					10	5.45
Cutlets	180	4.98	330	4.90	1,060	4.89
Cutlets, thin sliced	10	4.99			170	4.55
Strips						
Tenders	20	5.57			290	4.57
Marinated Tenders	370	4.29	220	4.19	1,320	3.95
Drumsticks	160	1.81	120	1.96	130	1.75
Thighs	30	1.67			40	2.16
Wings	160	1.81	120	1.96	100	1.71
Necks	20	1.40	60	1.25		
Smoked Drumsticks	10	1.68	20	2.50	30	1.99
Smoked Wings	10	1.68	20	2.50	30	1.99
Smoked Necks	10	1.49	30	2.26	30	1.89
GROUND TURKEY:	**3,300**	**3.62**	**790**	**3.03**	**6,070**	**3.04**
Patties	210	3.38	10	3.99	810	2.88
Sausage	640	3.61	410	3.26	970	2.66
85% lean	440	2.31	270	2.37	260	2.04
93% lean	1,100	3.30	80	3.08	2,760	2.75
Breast	910	4.68	20	6.36	1,270	4.26
Rolls (frsh/frz 1 lb.)	100	1.82			340	1.47
Specialty [5/]						
Patties						
93-94% lean	170	4.00			330	4.58
Breast	230	5.29			20	6.99

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

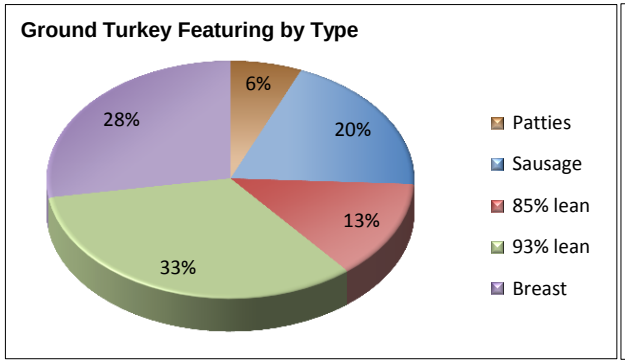
This Week's Turkey Feature Highlights

Retail activity is light on regular turkey items, but increasing on deli items. Offers on turkeys have slowed for the time being; soon they will pick up again for the upcoming holiday period. Promotions on bone-in breasts are almost non-existent. A few stores offer rotisserie breasts, prices are lower. Boneless white parts activity is light. Cutlets are less available, marinated tenders are more available; both items will cost more. Dark parts are more active this week and fully represented; prices are lower on everything except fresh necks. Ground turkey activity returns to pre-holiday levels. Ground breast and 93% lean are the most popular and a good choice for consumers looking to lose some of the weight they gained over Thanksgiving. Deli is back to pre-holiday levels. Service deli Category 1 is the most heavily promoted. There are plenty of Category 2 and Category 3 deli items offered. Prices are mixed, lower on processor brand turkey, higher on private brand turkey, lower on all service deli chicken. Self-service deli processor brands are very active; prices are higher.

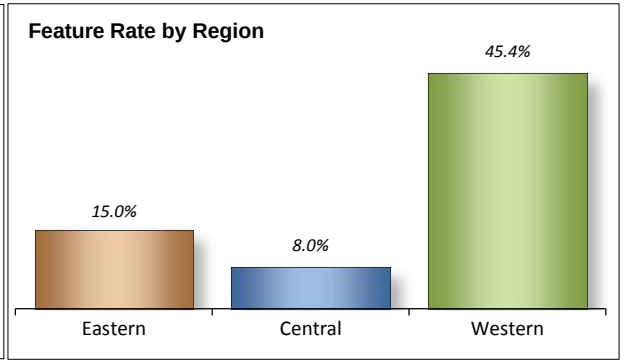
Whole Bird Activity Leading to Christmas



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. Dec 02, 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/]	**15.0% of 8,400 sampled outlets**			**8.0% of 6,400 sampled outlets**			**45.4% of 4,700 sampled outlets**		
Special Rate [4/]	**0.0% of stores w/ no-price promotions**			**0.0% of stores w/ no-price promotions**			**0.0% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 2,150**			**Activity Index = 740**			**Activity Index = 2,130**		
	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	1.39	10	1.39						
" - Toms									
Frozen - Hens	0.59 - 1.29	150	1.12	0.99	40	0.99			
" - Toms	0.59 - 1.29	150	1.12	0.99	40	0.99			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen				1.69 - 1.88	30	1.79			
Split, bone-in									
Fresh	2.89	10	2.89						
Rotisserie	6.89 - 7.99	210	7.62						
Boneless, whole									
Cutlets	4.99 - 5.45	160	5.04	3.49 - 5.64	20	4.49			
Cutlets, thin sliced	4.99	10	4.99						
Strips									
Tenders	5.49	10	5.49	5.64	10	5.64			
Marinated Tenders	3.19 - 4.79	340	4.29	3.73	10	3.73	4.66	20	4.66
Drumsticks	1.69 - 1.99	130	1.91	1.29 - 1.49	30	1.36			
Thighs				1.29 - 1.99	30	1.67			
Wings	1.69 - 1.99	130	1.91	1.29 - 1.49	30	1.36			
Necks				1.29 - 1.49	20	1.40			
Smoked Drumsticks				1.68	10	1.68			
Smoked Wings				1.68	10	1.68			
Smoked Necks				1.49	10	1.49			
GROUND TURKEY:									
Patties	3.38	170	3.38	3.29 - 3.49	40	3.37			
Sausage	3.11 - 3.99	420	3.94	2.70 - 3.00	60	2.88	3.00 - 3.27	160	3.03
85% lean	2.16 - 2.40	190	2.38	2.00 - 2.48	70	2.08	2.33	180	2.33
93% lean	2.98 - 3.07	30	3.02	2.39 - 3.20	40	2.83	2.79 - 3.99	1,030	3.33
Breast (99-100% lean)	3.99 - 4.99	30	4.60	4.79	190	4.79	3.99 - 4.99	690	4.66
Rolls (frsh/frz 1 lb.)				0.99 - 2.49	50	1.91	1.69 - 1.79	50	1.73
Specialty [5/]									
Patties									
93-94% lean	3.99 - 4.00	170	4.00						
Breast	5.29	230	5.29						

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Dec 02, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/02 thru 12/08.

(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/	71.7% of 19,500 stores		27.8% of 19,500 stores		73.3% of 8,400 sampled outlets			69.3% of 6,400 sampled outlets			72.4% of 4,700 sampled outlets		
Activity Index 2/	41,010		13,660		Activity Index = 22,520			Activity Index = 9,700			Activity Index = 8,790		
	Stores	Wtd Avg	Stores	Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey													
Category 1													
Processor Brand	4,980	7.94	980	8.12	5.98 - 9.99	3,720	8.10	5.99 - 8.99	970	7.29	6.98 - 9.99	290	8.09
Private Brand	4,720	7.48	1,120	7.28	6.99 - 8.99	4,380	7.50	6.99 - 7.99	330	7.18	10.99	10	10.99
Category 2													
Processor Brand	3,640	5.92	1,730	6.03	4.49 - 6.99	1,120	6.21	4.58 - 6.99	1,590	5.81	4.99 - 6.99	930	5.77
Private Brand	2,320	7.01	2,240	6.48	5.99 - 7.49	140	6.41	4.99 - 6.99	1,010	6.77	5.99 - 7.99	1,170	7.28
Category 3													
Processor Brand	1,390	3.98	630	4.48	2.99 - 4.48	940	3.95	2.99 - 4.99	450	4.05			
Private Brand	1,380	5.33	130	4.35	4.99	80	4.99	4.99	210	4.99	4.99 - 5.49	1,090	5.42
Turkey Ham													
Processor Brand	410	3.16	640	3.56	2.99 - 3.99	230	3.40	2.98 - 3.49	20	3.25	2.49 - 3.89	160	2.79
Private Brand													
Turkey Pastrami													
Processor Brand	240	3.79	390	3.57	3.39 - 3.99	210	3.76	2.98 - 5.99	10	4.14	3.98	20	3.98
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,780	7.73	1,750	8.00	6.97 - 9.49	2,830	7.96	4.99 - 7.99	800	6.97	6.99 - 10.99	150	7.55
Private Brand	2,290	7.12	230	7.99	6.99 - 7.99	1,530	7.21	5.49 - 6.99	370	6.18	6.99 - 7.99	390	7.65
Category 2													
Processor Brand	40	4.89	40	5.81	5.99	10	5.99	3.98 - 4.98	30	4.52			
Private Brand			70	5.99									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	6,490	3.11	1,830	3.08	2.00 - 3.99	3,130	3.16	2.00 - 3.99	1,630	3.08	1.88 - 3.99	1,730	3.06
Private Brand	1,530	3.30	60	3.00	2.68 - 3.50	850	3.11	3.00 - 3.50	240	3.38	2.99 - 3.99	440	3.61
Turkey 16 oz													
Processor Brand	950	5.45	540	4.98	4.49 - 6.99	320	5.64	3.99 - 6.99	370	5.62	4.99	260	4.99
Private Brand													
Chicken 7-10 oz													
Processor Brand	5,890	3.12	1,220	3.11	2.00 - 3.99	2,750	3.17	2.00 - 3.99	1,430	3.11	1.88 - 3.99	1,710	3.06
Private Brand	960	3.48	60	3.00	2.68 - 3.50	280	3.35	3.00 - 3.50	240	3.38	2.99 - 3.99	440	3.61

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