



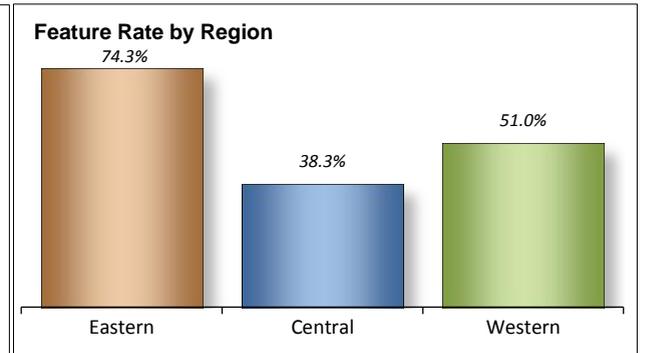
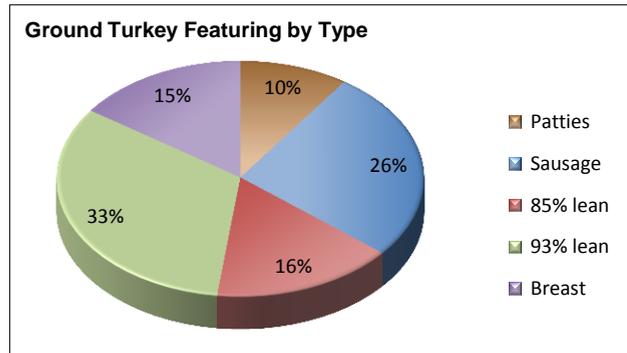
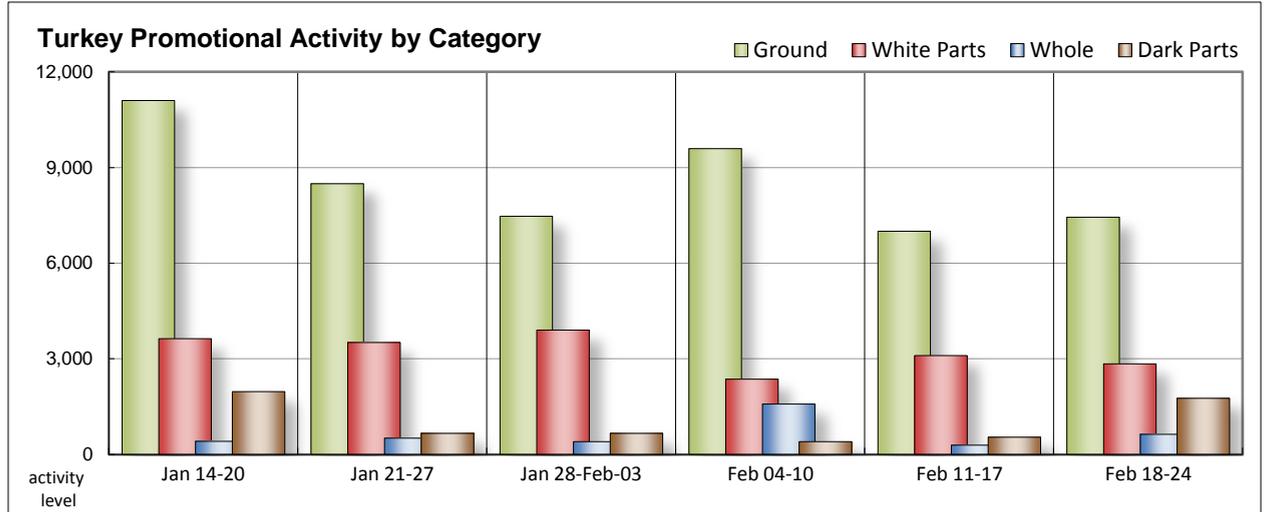
USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/18 thru 02/24.
 (prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Feb 18, 2011

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	56.8% of 19,500 outlets		44.4% of 19,500 outlets		47.4% of 19,200 outlets	
Special Rate ^{4/}	2.4%		7.7%		6.4%	
Activity Index ^{2/}	15,660		12,420		15,250	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			10	1.29	30	0.99
" - Toms			10	1.29		
Frozen - Hens	240	0.74	70	0.98	110	0.84
" - Toms	390	0.81	200	0.65	130	0.86
PARTS:						
Breast:						
Bone-in, whole						
Fresh	30	2.26	150	2.07	130	2.72
Frozen	570	1.66	1,040	1.63	1,150	1.32
Split, bone-in						
Fresh	20	2.47	30	3.28	20	2.39
Rotisserie	990	7.94	950	7.13	230	7.50
Boneless, whole						
Cutlets	730	4.87	610	4.81	1,480	4.41
Cutlets, thin sliced	20	3.99	240	4.97	260	4.59
Strips					220	3.56
Tenders	480	4.67	40	4.09	980	4.34
Marinated Tenders	2,620	3.82	940	3.91	770	3.71
Drumsticks						
Thighs	380	1.53	60	1.55	70	1.57
Wings	260	1.73	80	2.14	120	1.91
Necks	520	1.71	270	1.74	20	1.33
Smoked Drumsticks	20	1.55	90	1.55	10	1.39
Smoked Wings	340	2.43	20	2.29	150	2.52
Smoked Necks	40	1.88	10	2.30		
	200	2.03	10	2.30		
GROUND TURKEY:	7,440	2.93	7,000	2.60	8,320	2.74
Patties	720	2.73	780	2.89	820	3.05
Sausage	1,960	2.65	1,580	2.85	1,920	2.71
85% lean	1,190	2.13	2,360	2.03	1,620	2.08
93% lean	2,430	2.82	2,050	2.67	3,190	2.68
Breast	1,140	4.61	230	5.07	770	4.11
Rolls (frsh/frz 1 lb.)	330	1.94	500	1.88	240	1.21
Specialty ^{5/}						
Patties	20	3.99			120	3.50
93-94% lean	20	3.99	140	3.49	670	2.99
Breast					60	5.07

This Week's Turkey Feature Highlights

Feature activity rebounds this week. Offers increase on frozen hens and toms; prices trend sharply lower on hens, sharply higher on toms. Fewer stores place fresh and frozen bone-in breasts in the circulars. Offers are slightly higher on rotisserie breasts; average prices are over 80 cents higher. Boneless white parts are more active with heavy promotional activity on marinated tenders. This is the week to buy dark parts. They are widely available and advertised prices trend lower on most items. Promotional activity increases on ground turkey. More retailers offers sausage, 93% lean and ground breast, fewer stores offer the less expensive 85% lean. Service deli promotions are more active on processor and private category 1, less active on category 2, and fewer stores promote category 3 items. Ham and pastrami get more ad space this week. The big jump is in processor brands of 7-10 oz self-service deli packages. There is less interest in the 16 ounce turkey items.



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.

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 02/18 thru 02/24.
 (prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Feb 18, 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/} Special Rate ^{4/} Activity Index ^{2/}	74.3% of 8,400 sampled outlets 1.0% of stores w/ no-price promotions Activity Index = 9,580			38.3% of 6,400 sampled outlets 6.0% of stores w/ no-price promotions Activity Index = 3,740			51.0% of 4,700 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,300		
	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	0.69 - 0.99	210	0.72	0.69 - 1.29	30	0.88			
" - Toms	0.69 - 0.99	210	0.72	0.89 - 1.29	180	0.91			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99	10	1.99				2.39	20	2.39
Frozen	0.99 - 1.99	290	1.72	1.17 - 1.79	260	1.59	1.69 - 1.79	20	1.76
Split, bone-in									
Fresh	1.99 - 2.99	20	2.47						
Rotisserie	5.99 - 8.99	410	7.90	6.99 - 9.99	310	8.82	6.99	270	6.99
Boneless, whole									
Cutlets	3.99 - 6.99	440	4.49	5.45	290	5.45			
Cutlets, thin sliced	3.99	20	3.99						
Strips									
Tenders	4.49	180	4.49	4.79	290	4.79	4.59	10	4.59
Marinated Tenders	3.19 - 4.26	1,720	3.78	3.14 - 4.26	670	3.89	3.86 - 3.99	230	3.93
Drumsticks	1.49 - 1.59	320	1.49	1.39 - 1.69	30	1.49	1.99	30	1.99
Thighs	1.49 - 2.49	220	1.70	1.69	10	1.69	1.99	30	1.99
Wings	1.49 - 2.19	490	1.72	1.39 - 1.69	30	1.49			
Necks				1.39 - 1.69	20	1.55			
Smoked Drumsticks	1.88 - 2.98	200	2.20	1.78 - 1.98	20	1.88	2.89	120	2.89
Smoked Wings	1.88	20	1.88	1.78 - 1.98	20	1.88			
Smoked Necks	1.59 - 2.19	190	2.05	1.78	10	1.78			
GROUND TURKEY:									
Patties	2.18 - 3.99	670	2.72	2.50 - 3.00	50	2.87			
Sausage	2.39 - 3.29	1,740	2.59	2.39 - 3.99	90	2.82	3.27	130	3.27
85% lean	1.69 - 2.66	460	2.28	1.65 - 2.50	690	2.04	1.99	40	1.99
93% lean	2.08 - 3.84	1,240	2.77	2.08 - 3.30	490	2.80	1.91 - 3.99	700	2.90
Breast (99-100% lean)	4.61 - 5.38	460	4.79	3.99 - 4.79	220	4.67	3.30 - 4.99	460	4.40
Rolls (frsh/frz 1 lb.)	1.99	60	1.99	1.00 - 1.99	30	1.45	1.99	240	1.99
Specialty ^{5/}									
Patties	3.99	20	3.99						
93-94% lean				3.99	20	3.99			
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Feb 18, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/18 thru 02/24.

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

Feature Rate ^{1/}	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)		
	81.5% of 19,500 stores		83.8% of 19,500 stores		86.3% of 8,400 sampled outlets			79.7% of 6,400 sampled outlets			75.2% of 4,700 sampled outlets		
Activity Index ^{2/}	51,320		47,370		Activity Index = 26,190			Activity Index = 14,560			Activity Index = 10,570		
	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	6,930	7.48	5,690	7.47	5.99 - 10.49	5,630	7.44	5.98 - 9.99	900	7.63	6.99 - 11.99	400	7.69
Private Brand	3,060	7.66	2,330	7.52	6.49 - 8.49	2,610	7.79	5.99 - 8.99	450	6.96			
Category 2													
Processor Brand	5,000	5.85	5,390	5.94	4.98 - 6.99	1,700	6.09	4.68 - 6.99	2,430	5.71	4.99 - 5.99	870	5.79
Private Brand	4,620	6.08	4,550	6.41	3.98 - 6.99	1,610	6.24	4.49 - 6.99	1,350	5.69	4.99 - 7.49	1,660	6.26
Category 3													
Processor Brand	760	4.19	1,060	3.81	2.99 - 4.99	310	4.59	2.94 - 4.99	410	3.83	3.99 - 5.99	40	4.72
Private Brand	80	3.99	70	4.27	3.98 - 3.99	80	3.99						
Turkey Ham													
Processor Brand	650	3.26	220	3.38	2.69 - 3.99	260	3.13	2.88 - 3.49	290	3.47	2.49 - 3.59	100	2.95
Private Brand	120	5.00									5.00	120	5.00
Turkey Pastrami													
Processor Brand	750	4.21	440	3.75	3.49 - 7.99	300	4.84	3.29 - 9.49	440	3.80	3.99	10	3.99
Private Brand	30	5.99	10	5.98	5.99	30	5.99						
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,020	7.33	3,900	7.44	4.69 - 8.99	2,250	7.46	4.98 - 8.99	750	6.90	7.99	20	7.99
Private Brand	660	6.95	700	7.80	6.99 - 7.49	310	7.34	5.49 - 6.99	230	6.40	6.99	120	6.99
Category 2													
Processor Brand	500	5.67	480	5.93	4.99 - 5.99	410	5.56	3.98 - 6.99	90	6.16			
Private Brand			70	7.99									
SELF-SERVICE DELI (dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	10,520	3.12	8,140	3.32	2.00 - 4.59	4,820	3.13	2.00 - 4.00	2,930	2.87	2.50 - 4.99	2,770	3.38
Private Brand	2,390	3.06	3,130	2.88	2.00 - 3.50	650	2.95	2.99 - 3.00	800	2.99	2.99 - 3.50	940	3.19
Turkey 16 oz													
Processor Brand	850	4.41	2,160	5.01	2.69 - 5.49	490	3.90	3.29 - 5.50	140	4.32	3.79 - 5.99	220	5.59
Private Brand	70	4.39	130	3.50	4.39	70	4.39						
Chicken 7-10 oz													
Processor Brand	9,200	3.10	6,140	3.28	2.28 - 4.59	4,120	3.08	2.00 - 4.00	2,550	2.85	2.50 - 4.99	2,530	3.39
Private Brand	2,110	3.10	2,760	2.87	2.00 - 3.50	540	3.07	2.99 - 3.00	800	2.99	3.00 - 3.50	770	3.24

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)