



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/05 thru 08/11.

Fri. Aug 05, 2011

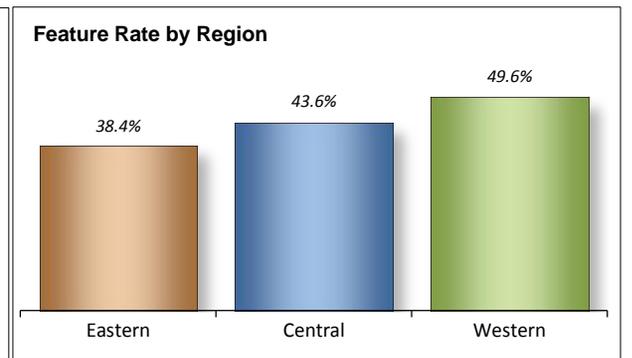
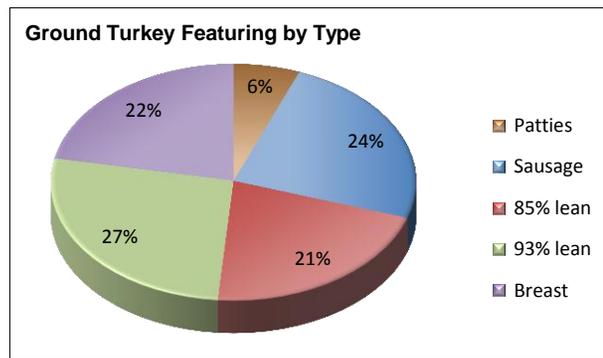
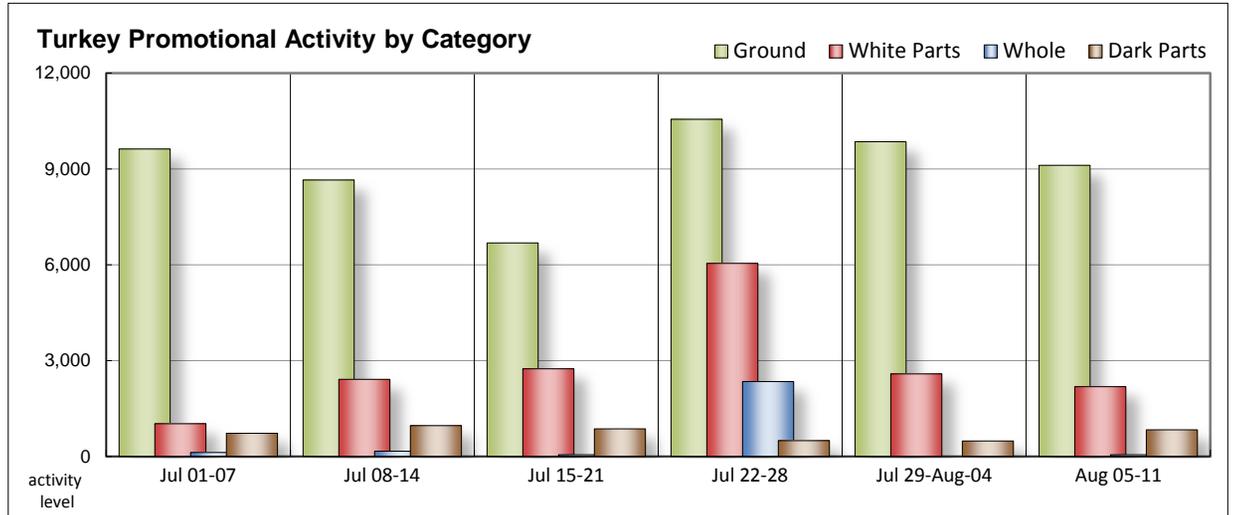
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	42.8% of 19,500 outlets		43.2% of 19,500 outlets		56.5% of 19,200 outlets	
Special Rate ^{4/}	7.9%		2.3%		4.7%	
Activity Index ^{2/}	12,970		15,490		16,580	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					230	0.89
" - Toms					220	0.89
Frozen - Hens						
" - Toms	50	1.79				
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	2.29	70	2.44	60	1.99
Frozen	380	1.56	1,520	1.80	780	1.70
Split, bone-in						
Fresh	10	2.29	10	2.98		
Rotisserie	360	8.48	220	7.70	540	7.82
Boneless, whole			80	4.63	30	4.99
Cutlets	1,100	4.86	610	5.25	820	4.86
Cutlets, thin sliced	10	4.99			350	4.99
Strips						
Tenders	310	4.76	70	4.53	570	3.97
Marinated Tenders	400	3.89	1,620	4.30	570	3.87
Drumsticks	330	1.54	190	1.96	140	1.36
Thighs	90	2.29	50	2.32	30	1.99
Wings	230	1.57	180	1.79	110	1.28
Necks	70	1.92			70	1.32
Smoked Drumsticks	10	1.98	30	1.99	280	1.93
Smoked Wings	80	2.34	30	1.99	280	1.93
Smoked Necks	20	1.49			180	1.67
GROUND TURKEY:	9,110	3.23	9,850	3.01	11,070	2.80
Patties	540	3.02	1,540	3.19	650	3.21
Sausage	2,200	3.04	1,860	3.12	2,390	2.80
85% lean	1,940	2.37	1,450	2.34	3,430	2.28
93% lean	2,430	3.05	3,980	2.81	2,590	2.46
Breast	2,000	4.54	1,020	4.27	2,010	3.99
Rolls (frsh/frz 1 lb.)	320	1.37	650	2.66	240	1.78
Specialty ^{5/}						
Patties	20	4.99			70	3.99
93-94% lean	20	3.33	140	3.49	50	3.71
Breast	40	5.50				

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

This Week's Turkey Feature Highlights

Retail activity for mid-month slows. Few stores are interested in featuring whole turkeys or bone-in breasts, it is just too hot. Rotisserie breasts are more available this week. Boneless white parts are less active. Cutlets are heavily promoted and prices are more attractive this week. Increased offers on tenders are at higher price levels. Marinated tenders are less active, but prices make this item worth looking for. Dark parts are fully represented, especially fresh drums and wings. Ground turkey continues to slow. Fewer stores offer 93% lean and patties; ground breast activity is sharply higher. More stores are running deli promotions. Offers increase on service deli Category 1 and Category 3, decrease on Category 2. Activity on self-service deli slows on processor brands; increases on private brands. It's August, which means time to stock up on school supplies. Turkey will have to compete for the consumers' limited funds in this tight economy.



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/}	38.4% of 8,400 sampled outlets			43.6% of 6,400 sampled outlets			49.6% of 4,700 sampled outlets		
Special Rate ^{4/}	2.4% of stores w/ no-price promotions			9.1% of stores w/ no-price promotions			15.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,590			Activity Index = 3,020			Activity Index = 2,280		
	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									
" - Toms				1.79	50	1.79			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.29	10	2.29						
Frozen	1.37 - 1.58	210	1.38	1.59 - 1.99	170	1.78			
Split, bone-in									
Fresh	2.29	10	2.29						
Rotisserie	6.89 - 9.99	240	8.97	6.99 - 7.89	80	7.78	6.99	40	6.99
Boneless, whole									
Cutlets	4.49 - 4.99	980	4.77	5.59	120	5.59			
Cutlets, thin sliced	4.99	10	4.99						
Strips									
Tenders	3.99	150	3.99	3.99	10	3.99	5.59	150	5.59
Marinated Tenders	4.26 - 4.66	120	4.33	2.66 - 4.66	280	3.69			
Drumsticks	1.39 - 1.99	310	1.54	1.49	10	1.49	1.49	10	1.49
Thighs	2.29	90	2.29						
Wings	1.39 - 1.99	210	1.58	1.49	10	1.49	1.49	10	1.49
Necks	1.99	60	1.99				1.49	10	1.49
Smoked Drumsticks				1.98	10	1.98			
Smoked Wings	2.39	70	2.39	1.98	10	1.98			
Smoked Necks	1.49	20	1.49						
GROUND TURKEY:									
Patties	2.49 - 3.50	410	2.91	2.50 - 3.50	60	3.08	3.00 - 3.99	70	3.58
Sausage	2.59 - 3.99	1,390	2.96	2.63 - 3.29	420	3.00	2.99 - 3.99	390	3.38
85% lean	1.92 - 2.92	1,210	2.35	1.66 - 2.49	600	2.29	2.40 - 2.99	130	2.87
93% lean	2.39 - 3.45	930	2.92	2.08 - 3.99	690	2.83	2.49 - 3.99	810	3.39
Breast (99-100% lean)	3.07 - 5.22	1,100	4.61	3.69 - 4.79	240	4.35	3.19 - 5.39	660	4.50
Rolls (frsh/frz 1 lb.)	2.33	60	2.33	1.00 - 1.33	260	1.15			
Specialty ^{5/}									
Patties	4.99	10	4.99				4.99	10	4.99
93-94% lean				3.33	20	3.33			
Breast	5.00 - 5.99	40	5.50						



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 05, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/05 thru 08/11.

(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/}	83.9% of 19,500 stores		80.0% of 19,500 stores		85.4% of 8,400 sampled outlets			88.4% of 6,400 sampled outlets			75.0% of 4,700 sampled outlets		
Activity Index ^{2/}	46,410		45,570		Activity Index = 22,030			Activity Index = 15,530			Activity Index = 8,850		
	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	6,750	8.03	5,350	7.68	4.99 - 9.99	4,320	7.97	5.99 - 9.69	960	7.69	6.99 - 10.99	1,470	8.44
Private Brand	2,500	8.19	1,360	7.18	6.99 - 8.99	2,040	8.23	6.99 - 8.99	190	7.48	6.99 - 8.49	270	8.39
Category 2													
Processor Brand	5,510	6.14	5,260	6.08	4.97 - 7.99	2,100	6.48	4.78 - 7.49	2,310	5.84	4.99 - 6.99	1,100	6.12
Private Brand	2,930	6.40	4,090	6.67	4.99 - 6.99	1,840	6.68	4.99 - 6.99	970	5.71	7.49	120	7.49
Category 3													
Processor Brand	1,270	3.97	770	4.01	3.28 - 4.98	330	3.96	2.99 - 4.99	330	3.98	3.48 - 3.99	610	3.97
Private Brand	30	3.99	60	4.62				3.99	30	3.99			
Turkey Ham													
Processor Brand	550	3.21	510	3.17	2.99 - 4.49	280	3.57	2.49 - 4.49	190	2.85	2.49 - 3.29	80	2.85
Private Brand			180	3.99									
Turkey Pastrami													
Processor Brand	250	4.04	200	4.07	3.99 - 4.49	100	4.33	2.99 - 4.59	150	3.84			
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	1,840	7.36	4,240	7.62	4.99 - 8.99	1,020	7.95	5.98 - 8.99	780	6.55	6.99 - 10.99	40	7.88
Private Brand	1,760	6.79	840	6.82	5.99 - 6.99	960	6.95	4.98 - 6.99	660	6.72	5.99	140	5.99
Category 2													
Processor Brand	1,370	6.32	310	6.41	6.49	1,090	6.49	4.99 - 6.99	280	5.66			
Private Brand	190	5.98						5.98	190	5.98			
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	8,490	3.01	9,440	3.29	2.33 - 3.59	3,410	3.09	1.99 - 3.99	3,650	2.95	2.50 - 3.99	1,430	2.99
Private Brand	2,690	3.27	2,030	2.98	3.00 - 3.50	690	3.16	2.19 - 3.50	910	3.32	3.29	1,090	3.29
Turkey 16 oz													
Processor Brand	630	6.27	430	5.48	4.69 - 6.99	330	6.23	4.94 - 6.99	300	6.31			
Private Brand													
Chicken 7-10 oz													
Processor Brand	7,010	3.07	8,520	3.30	2.59 - 3.59	2,880	3.12	1.99 - 3.99	2,720	3.07	2.50 - 3.99	1,410	2.99
Private Brand	2,640	3.27	1,980	2.97	3.00 - 3.50	640	3.15	2.19 - 3.50	910	3.32	3.29	1,090	3.29

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)