USDA Weekly Retail Turkey Feature Activity

Fri. Dec 23, 2011

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/23 thru 12/29.

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

NATIONAL SUMMARY

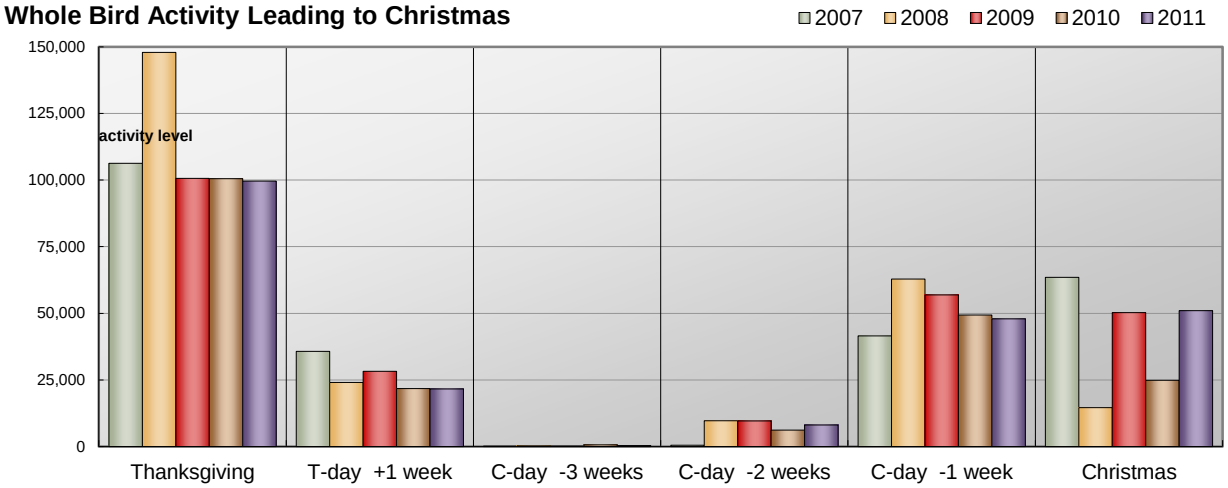
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**78.4% of 19,500 outlets**		**81.9% of 19,500 outlets**		**50.1% of 19,200 outlets**	
Special Rate [4/]	**1.9%**		**3.9%**		**1.7%**	
Activity Index [2/]	**66,540**		**65,080**		**33,320**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens	12,410	1.55	9,870	1.64	7,270	1.43
" - Toms	12,440	1.55	9,700	1.65	7,220	1.43
Frozen - Hens	13,330	1.05	14,410	1.08	4,740	1.10
" - Toms	12,810	1.05	13,930	1.07	5,640	1.06
PARTS:						
Breast:						
Bone-in, whole						
Fresh	2,220	2.65	1,140	2.72	2,040	2.37
Frozen	9,630	1.80	9,430	1.80	2,740	1.53
Split, bone-in						
Fresh	10	1.99	10	1.99		
Rotisserie	890	8.18	2,380	8.65	2,810	7.81
Boneless, whole						
Cutlets	400	4.99	330	4.99	120	4.29
Cutlets, thin sliced					10	4.59
Strips						
Tenders			380	4.76		
Marinated Tenders	170	4.46	140	4.65	170	4.00
Drumsticks	390	1.81	170	1.85	10	1.39
Thighs	30	2.75	20	2.99		
Wings	390	1.82	90	1.99	10	1.39
Necks	90	1.79	60	1.74		
Smoked Drumsticks	20	2.59	30	1.74		
Smoked Wings	50	2.08				
Smoked Necks	30	1.76				
GROUND TURKEY:	**840**	**3.77**	**2,540**	**3.46**	**540**	**3.41**
Patties			70	3.99		
Sausage	220	3.95	380	3.55	10	2.91
85% lean	150	2.77	510	2.64	140	2.31
93% lean	190	2.84	1,070	3.16	200	2.30
Breast	280	4.79	510	4.76	190	5.40
Rolls (frsh/frz 1 lb.)	20	1.62	10	1.48		
Specialty [5/]						
Patties						
93-94% lean	350	4.25	280	3.97	140	3.49
Breast	20	5.49	160	4.24		

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

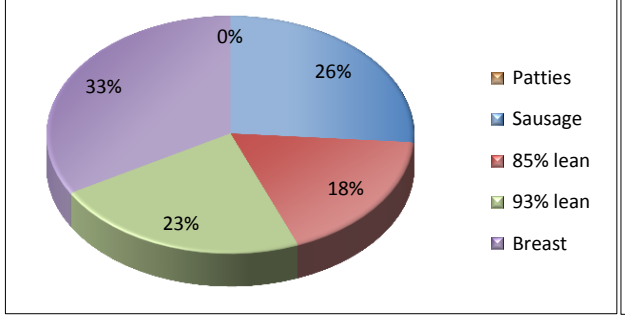
This Week's Turkey Feature Highlights

Retail feature activity is higher as turkeys compete with hams and roasts for Christmas and Hanukkah. Offers on fresh and frozen whole turkeys are higher compared to the same week a year ago; prices are higher on fresh, lower on frozen. Frozen kosher hens and toms are heavily promoted in the Eastern region. (*See our Holiday Retail Report for more information).* Fresh and frozen bone-in breasts command more ad space than last year; prices are higher on fresh and frozen. Fewer stores offer rotisserie breasts this week. More stores show cutlets; otherwise boneless white parts continue to keep a low profile. Dark parts are more active. Fresh drums and wings are the favorites and prices are lower this week. Retailers have limited interest in ground turkey items. Deli activity slows. Offers on service-deli Category 1 private brands outpace processor brands; prices are mixed. Offers increase on Category 2 processor brands, slow on private brands; prices are higher. Self-service deli slows on all items. Party platters are popular for weekend holiday celebrations and game day parties.

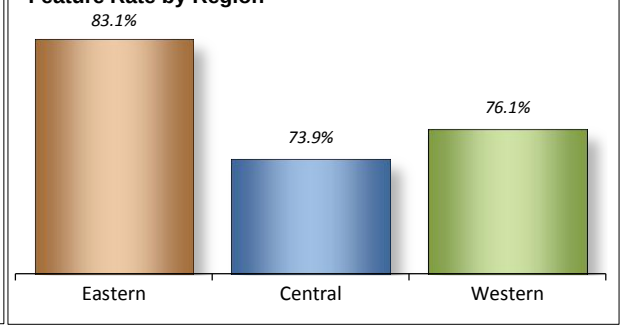
Whole Bird Activity Leading to Christmas



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 23, 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/]	**83.1% of 8,400 sampled outlets**			**73.9% of 6,400 sampled outlets**			**76.1% of 4,700 sampled outlets**		
Special Rate [4/]	**0.6% of stores w/ no-price promotions**			**1.2% of stores w/ no-price promotions**			**5.3% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 31,940**			**Activity Index = 20,310**			**Activity Index = 13,920**		
	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	0.99 - 1.99	6,450	1.46	0.99 - 2.19	3,450	1.68	1.29 - 1.99	2,510	1.57
" - Toms	0.99 - 1.99	6,370	1.46	0.99 - 2.19	3,440	1.68	1.29 - 1.99	2,630	1.59
Frozen - Hens	0.69 - 1.69	5,810	1.10	0.68 - 1.79	4,610	1.03	0.69 - 1.59	2,910	0.99
" - Toms	0.69 - 1.69	5,510	1.09	0.68 - 1.79	4,460	1.02	0.69 - 1.59	2,840	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99 - 3.49	1,350	2.66	1.99 - 3.19	560	2.55	1.99 - 2.89	310	2.74
Frozen	0.97 - 2.99	4,340	1.75	0.99 - 2.49	3,220	1.79	0.99 - 2.29	2,070	1.91
Split, bone-in									
Fresh				1.99	10	1.99			
Rotisserie	6.74 - 8.99	330	7.52	6.99 - 8.99	230	7.98	8.99	330	8.99
Boneless, whole									
Cutlets	4.99	400	4.99						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.66	110	4.66	4.26	20	4.26	3.99	40	3.99
Drumsticks	1.59 - 2.99	340	1.81	1.49 - 2.28	50	1.84			
Thighs	2.99	20	2.99	2.28	10	2.28			
Wings	1.59 - 2.99	340	1.81	1.79 - 2.28	50	1.90			
Necks	1.79	50	1.79	1.79	40	1.79			
Smoked Drumsticks	2.59	20	2.59						
Smoked Wings	1.74 - 2.59	50	2.08						
Smoked Necks	1.89	20	1.89	1.49	10	1.49			
GROUND TURKEY:									
Patties									
Sausage	3.19 - 3.99	220	3.95						
85% lean	2.16 - 2.38	40	2.29	2.50 - 2.99	110	2.94			
93% lean	2.79 - 3.49	170	2.84	2.79 - 2.98	20	2.86			
Breast (99-100% lean)							4.79	280	4.79
Rolls (frsh/frz 1 lb.)				1.48 - 1.69	20	1.62			
Specialty [5/]									
Patties									
93-94% lean	3.99 - 4.49	350	4.25						
Breast				5.49	20	5.49			

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Dec 23, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/23 thru 12/29.

(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/	56.6% of 19,500 stores		71.1% of 19,500 stores		53.8% of 8,400 sampled outlets			72.7% of 6,400 sampled outlets			39.5% of 4,700 sampled outlets		
Activity Index 2/	30,460		36,540		Activity Index = 16,590			Activity Index = 10,550			Activity Index = 3,320		
	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	3,560	8.13	5,950	7.54	6.98 - 9.99	2,260	8.55	5.99 - 8.99	960	7.15	6.99 - 12.99	340	8.13
Private Brand	3,670	6.84	2,150	7.24	5.99 - 8.99	2,220	7.19	5.99 - 8.99	1,450	6.31			
Category 2													
Processor Brand	4,710	6.29	4,520	5.97	4.69 - 7.99	2,020	6.43	4.49 - 6.99	2,020	6.08	4.99 - 6.99	670	6.53
Private Brand	3,470	6.68	5,340	6.01	3.99 - 6.99	2,090	6.71	4.99 - 6.99	1,120	6.31	7.99	260	7.99
Category 3													
Processor Brand	260	3.73	380	3.83	3.98 - 4.98	80	4.14	2.99 - 3.99	160	3.53	2.99 - 3.98	20	3.71
Private Brand	110	4.80	70	4.58	4.48 - 4.99	110	4.80						
Turkey Ham													
Processor Brand	280	3.67	240	3.19	3.99	180	3.99	2.98 - 3.48	20	3.23	2.39 - 3.59	80	3.05
Private Brand													
Turkey Pastrami													
Processor Brand	430	3.92	220	5.46	3.49 - 8.99	390	3.88	3.48 - 4.49	40	4.29			
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,070	7.23	3,780	7.38	5.99 - 9.69	940	8.11	4.58 - 9.99	720	6.75	5.99 - 7.99	410	6.06
Private Brand	2,230	7.33	1,290	7.11	6.99 - 7.99	1,430	7.29	6.99	420	6.99	7.49 - 7.99	380	7.83
Category 2													
Processor Brand	260	6.67	90	5.47				3.98 - 6.99	260	6.67			
Private Brand			470	6.49									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	3,460	3.23	4,440	3.31	1.99 - 3.99	1,860	3.35	2.00 - 3.99	1,150	3.08	2.50 - 3.50	450	3.17
Private Brand	490	3.45	870	2.99	2.68 - 3.69	460	3.48	2.78 - 3.00	30	2.86			
Turkey 16 oz													
Processor Brand	1,790	4.94	1,920	5.03	3.99 - 4.19	290	4.00	4.49 - 6.49	1,220	5.15	4.99	280	4.99
Private Brand													
Chicken 7-10 oz													
Processor Brand	3,180	3.26	3,940	3.33	2.50 - 3.99	1,800	3.38	2.00 - 3.99	950	3.07	2.50 - 3.50	430	3.17
Private Brand	490	3.45	870	2.99	2.68 - 3.69	460	3.48	2.78 - 3.00	30	2.86			

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)