



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/06 thru 01/12.

Fri. Jan 06, 2012

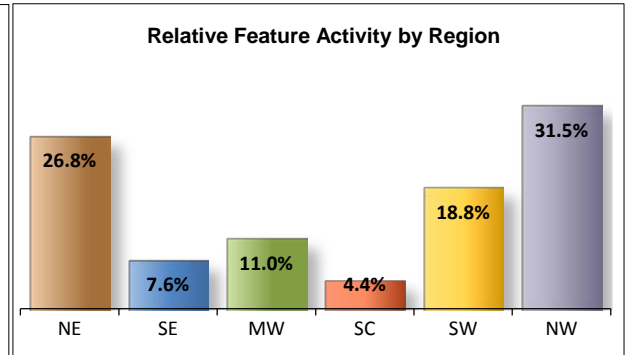
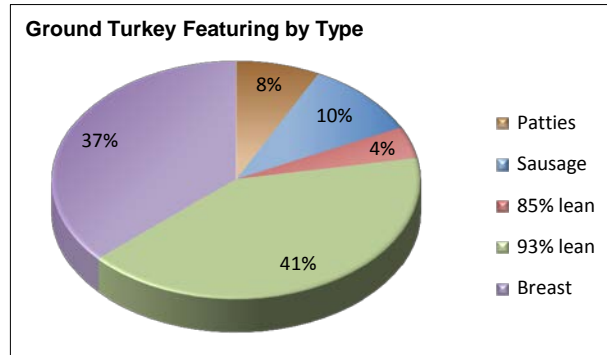
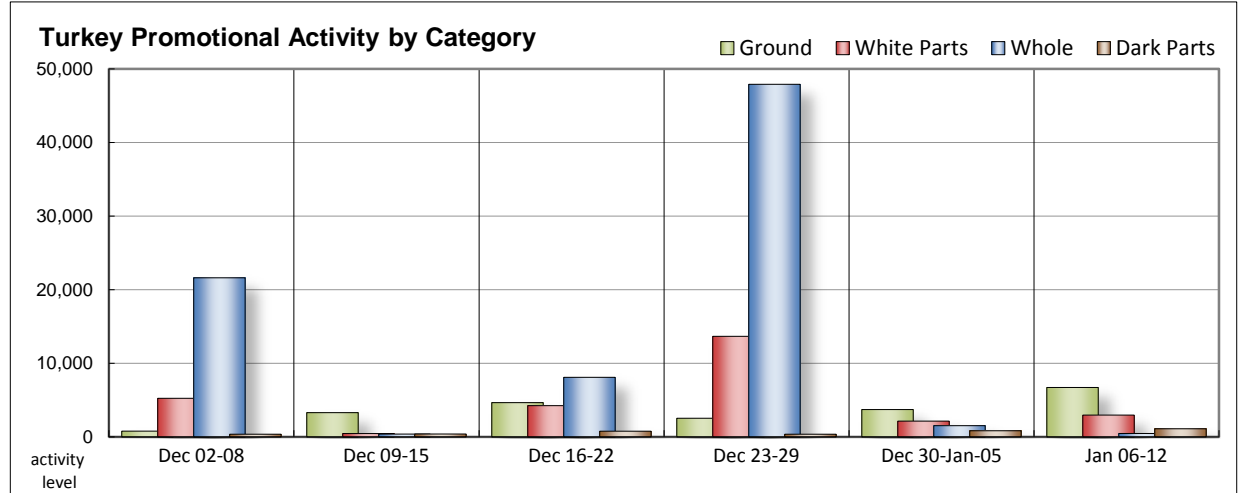
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	33.9% of 22,500 outlets		24.8% of 22,500 outlets		58.0% of 19,500 outlets	
Special Rate ^{4/}	2.6%		0.3%		1.6%	
Activity Index ^{2/}	12,520		8,700		18,470	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			100	1.81		
" - Toms			100	1.81		
Frozen - Hens	250	1.51	660	1.27	690	1.07
" - Toms	220	1.48	670	1.37	690	1.07
PARTS:						
Breast:						
Bone-in, whole						
Fresh	40	2.69	280	2.55	30	2.19
Frozen	820	2.03	510	2.01	240	1.45
Split, bone-in						
Fresh			10	1.99	10	1.99
Rotisserie	280	7.36	990	7.72	780	6.57
Boneless, whole	170	5.45	50	4.65	110	4.50
Cutlets	1,230	4.95	220	4.94	1,440	4.48
Cutlets, thin sliced	140	4.92	20	5.99	240	4.99
Strips						
Tenders	290	4.12	70	3.99	450	4.40
Marinated Tenders	480	4.05	400	3.92	1,220	3.98
Drumsticks	330	1.71	150	1.87	290	1.58
Thighs	10	1.99			70	2.20
Wings	380	1.68	100	1.95	270	1.55
Necks	10	1.69			10	1.39
Smoked Drumsticks	130	2.11	200	2.46	210	2.16
Smoked Wings	130	2.35	200	2.46	220	2.23
Smoked Necks	120	1.90	190	1.99	200	1.73
GROUND TURKEY:	6,720	3.47	3,720	2.58	10,440	3.07
Patties	500	3.61	180	3.10	260	2.41
Sausage	700	3.27	560	3.16	1,510	2.84
85% lean	290	2.46	1,930	1.84	1,020	2.27
93% lean	2,770	3.02	590	3.12	4,650	2.65
Breast	2,460	4.26	460	4.46	3,000	4.15
Rolls (frsh/frz 1 lb.)	440	2.03	40	2.05	590	1.51
Specialty ^{5/}						
Patties						
93-94% lean	320	4.44	20	3.99	140	3.49
Breast	10	5.99				

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

This Week's Turkey Feature Highlights

Retail activity is recovering from the post-holiday drop. Fewer stores offer frozen whole body turkeys; prices are higher. Fresh bone-in breasts are less available, offers increase on frozen bone-in breasts. Both will cost more this week. Promotions on rotisserie breasts decrease on volume and value. Boneless white parts are more active due to cutlets having a strong presence in the circulars; prices trend higher on everything except thin sliced cutlets. Dark parts are fully represented and prices are lower. Offers increase on ground turkey. The 93% lean and ground breast are most active and provide a healthier choice to start the new year. Consumers will also get a price cut on those two grinds while patties, sausage and 85% lean will cost more. Deli meats are more active. Service deli Category 1 slows but is still the most heavily promoted category. Offers increase on Category 2 and Category 3. Prices are mixed on the service deli items. Self-service deli is more active. Offers increase on Processor Brands, decrease on Private Brands; prices are lower.



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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Fri. Jan 06, 2012

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

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Feature Rate ^{1/}	56.1% of 4,400 sampled outlets			13.0% of 6,000 sampled outlets			32.0% of 4,000 sampled outlets		
Special Rate ^{4/}	3.7% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			10.4% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 4,330			Activity Index = 1,800			Activity Index = 1,720		
	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	1.69	40	1.69				0.99 - 1.29	10	1.18
" - Toms							0.99 - 1.69	20	1.37
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69	40	2.69						
Frozen	1.57 - 1.99	410	1.97	1.97	190	1.97	1.48 - 2.29	210	2.19
Split, bone-in									
Fresh									
Rotisserie	5.99 - 6.99	110	6.62						
Boneless, whole	4.99 - 5.69	160	5.54				3.99	10	3.99
Cutlets	3.99 - 5.79	1,130	5.00	3.99	40	3.99	4.49 - 5.64	60	4.62
Cutlets, thin sliced	3.99 - 5.49	50	4.80				4.99	90	4.99
Strips									
Tenders	3.99 - 4.99	260	4.05				5.64	10	5.64
Marinated Tenders	4.66 - 4.79	270	4.71	3.19	200	3.19	3.73	10	3.73
Drumsticks									
Thighs	1.39 - 1.89	310	1.72				1.39 - 1.69	20	1.53
Wings	1.39 - 1.89	360	1.69				1.99	10	1.99
Necks							1.39 - 1.69	20	1.53
Smoked Drumsticks	1.99 - 2.29	80	2.24	1.89	40	1.89	1.69	10	1.69
Smoked Wings	1.99 - 2.39	80	2.32	2.49	40	2.49	1.99	10	1.99
Smoked Necks	1.89 - 1.99	80	1.91	1.89	40	1.89			
GROUND TURKEY:									
Patties	2.99 - 3.99	140	3.90				3.99 - 4.29	130	4.24
Sausage	3.99	10	3.99	3.99	190	3.99	2.79 - 3.71	100	3.32
85% lean	1.89 - 2.47	50	2.21	2.47	20	2.47	2.00 - 2.98	30	2.58
93% lean	2.79 - 3.38	250	3.09	2.79	1,040	2.79	2.33 - 3.71	420	3.13
Breast (99-100% lean)	3.99 - 4.99	500	4.58				3.73 - 4.99	290	4.70
Rolls (frsh/frz 1 lb.)							0.88 - 2.50	250	2.06
Specialty ^{5/}									
Patties									
93-94% lean	4.00 - 4.99	310	4.47				3.49	10	3.49
Breast	5.99	10	5.99						



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	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	16.2% of 4,000 sampled outlets			54.5% of 2,900 sampled outlets			71.5% of 1,200 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 = 700			Activity Index = 2,150			Activity Index = 1,490		
	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							1.49	200	1.49
" - Toms							1.49	200	1.49
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.69	10	1.69						
Split, bone-in									
Fresh									
Rotisserie	8.99	40	8.99	7.49	130	7.49			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	4.29	20	4.29						
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.00	10	3.00	3.00 - 3.50	220	3.08			
Sausage	2.46	10	2.46	2.46	170	2.46	3.19 - 3.27	220	3.26
85% lean				2.50	190	2.50			
93% lean	2.40 - 3.99	130	3.05	2.40 - 3.99	680	3.21	2.39 - 3.89	250	3.17
Breast (99-100% lean)	3.99	360	3.99	3.99 - 4.99	730	4.19	3.19 - 5.39	580	4.01
Rolls (frsh/frz 1 lb.)	1.50 - 2.69	120	1.86	2.29	30	2.29	2.00 - 2.49	40	2.10
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 06, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/06 thru 01/12.

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

	NATIONAL SUMMARY						NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	This Week		Last Week		Last Year		82.1% of 4,400 sampled outlets			62.4% of 6,000 sampled outlets		
Feature Rate ^{1/}	68.0% of 22,500 stores		60.0% of 22,500 stores		64.9% of 19,500 stores		Activity Index = 13,770			Activity Index = 8,650		
Activity Index ^{2/}	43,200		37,740		47,320		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6,170	8.04	5,730	7.84	4,680	7.58	5.99 - 10.99	2,960	7.88	6.49 - 8.99	1,770	8.35
Private Brand	2,320	7.15	3,380	7.91	1,220	7.40	6.99 - 8.99	1,310	7.20	6.99	60	6.99
Category 2												
Processor Brand	5,030	6.06	3,460	5.73	4,050	5.82	4.99 - 6.99	1,560	6.35	4.99 - 6.99	570	6.02
Private Brand	4,220	6.55	1,280	5.85	5,330	6.23	5.99 - 6.99	800	6.40	5.99 - 6.99	660	6.82
Category 3												
Processor Brand	1,510	3.86	460	4.25	1,200	4.02	2.97 - 4.99	370	4.77	2.99 - 3.99	380	3.74
Private Brand	580	5.02	470	5.37	1,640	4.77	3.98 - 4.99	200	4.64	3.99 - 4.99	60	4.85
Turkey Ham												
Processor Brand	410	3.54	220	3.51	490	3.76	3.49 - 3.99	190	3.85	1.99 - 4.99	80	3.71
Private Brand	40	2.98			40	2.98	2.98	40	2.98			
Turkey Pastrami												
Processor Brand	280	4.38	120	4.58	390	3.42	3.49 - 3.99	190	3.97			
Private Brand	30	5.99			40	4.61						
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,820	7.23	2,580	7.43	3,100	7.22	5.99 - 7.99	770	7.26	6.49 - 8.99	420	7.76
Private Brand	830	7.02	1,370	7.21	1,500	6.60	6.99 - 7.49	380	7.14	5.99 - 7.49	210	6.65
Category 2												
Processor Brand	640	6.28	580	5.82	400	5.10	4.59 - 5.99	30	4.90	6.99	210	6.99
Private Brand					370	6.35						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,120	3.06	7,380	3.13	10,860	3.06	2.50 - 3.99	2,000	3.05	2.19 - 3.50	1,890	3.08
Private Brand	2,590	2.99	2,190	3.06	960	3.10	2.68 - 3.00	600	2.99	2.99 - 3.00	290	2.99
Turkey 16 oz												
Processor Brand	730	4.71	210	5.09	250	4.89	3.99 - 4.99	190	4.28	3.99	10	3.99
Private Brand	90	3.99										
Chicken 7-10 oz												
Processor Brand	6,200	3.03	6,690	3.14	9,980	3.06	2.50 - 3.99	1,580	2.99	2.19 - 3.50	1,750	3.07
Private Brand	2,590	2.99	1,620	3.08	820	3.14	2.68 - 3.00	600	2.99	2.99 - 3.00	290	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)



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Feature Rate ^{1/}	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
	74.2% of 4,000 sampled outlets			56.0% of 4,000 sampled outlets			63.7% of 2,900 sampled outlets			73.5% of 1,200 sampled outlets		
	Activity Index = 9,160			Activity Index = 5,660			Activity Index = 3,880			Activity Index = 2,080		
Activity Index ^{2/}	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary 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	5.99 - 10.99	710 7.83	6.99 - 9.49	240 8.25	8.99	20 8.99	6.99 - 12.99	470 8.10				
Private Brand	6.49 - 8.99	490 6.82	6.77 - 7.49	200 6.95	8.49	130 8.49	6.99	130 6.99				
Category 2												
Processor Brand	4.49 - 6.99	1,390 6.10	4.98 - 5.99	1,090 5.74	4.99 - 5.99	390 5.85	4.99	30 4.99				
Private Brand	4.98 - 6.99	430 5.76	5.99 - 7.99	820 6.66	5.99 - 7.99	1,090 6.62	5.99 - 8.99	420 6.89				
Category 3												
Processor Brand	2.39 - 4.94	510 3.45	2.97 - 4.99	90 3.57	2.99 - 3.79	130 3.44	3.99	30 3.99				
Private Brand	3.99 - 6.29	260 5.60	3.99	60 3.99								
Turkey Ham												
Processor Brand	2.98 - 4.99	50 4.22	1.99	20 1.99	2.29 - 2.99	70 2.46						
Private Brand												
Turkey Pastrami												
Processor Brand	2.98 - 4.99	40 4.16	3.98 - 9.99	50 6.12								
Private Brand	5.99	30 5.99										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 7.99	390 6.52	6.98 - 8.99	230 7.28			7.98	10 7.98				
Private Brand	5.99 - 7.99	240 7.18										
Category 2												
Processor Brand	3.29 - 6.99	360 5.90	6.99	40 6.99								
Private Brand												
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.88 - 3.99	1,790 3.02	2.00 - 2.50	810 2.74	3.39 - 4.29	440 3.54	2.50 - 4.29	190 3.37				
Private Brand	2.99 - 3.29	350 3.00	2.99 - 3.00	480 2.99	2.99	550 2.99	2.99	320 2.99				
Turkey 16 oz												
Processor Brand	3.99 - 4.98	80 4.18	3.99 - 4.98	380 4.81	5.99	70 5.99						
Private Brand	3.99	90 3.99										
Chicken 7-10 oz												
Processor Brand	1.88 - 3.99	1,600 2.99	2.00 - 2.50	670 2.68	3.39 - 4.29	440 3.54	2.50 - 4.29	160 3.43				
Private Brand	2.99 - 3.29	350 3.00	2.99 - 3.00	480 2.99	2.99	550 2.99	2.99	320 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)