USDA Weekly Retail Turkey Feature Activity

Fri. Apr 20, 2012

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/20 thru 04/26.

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

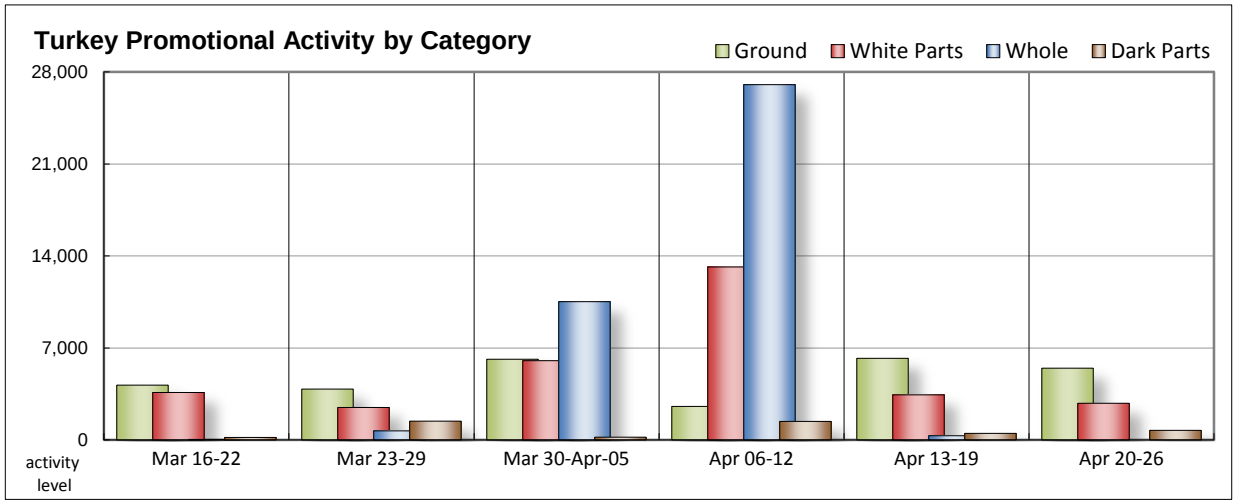
NATIONAL SUMMARY

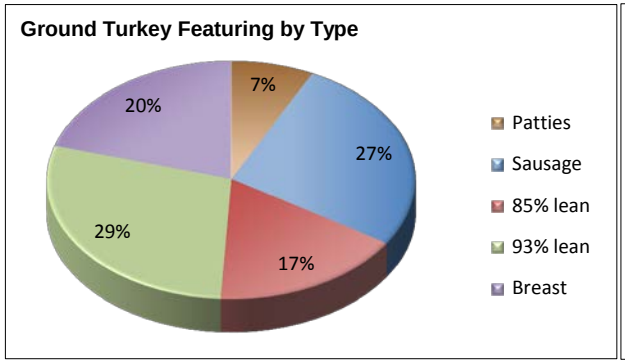
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**32.1% of 22,500 outlets**		**31.4% of 22,500 outlets**		**76.2% of 19,500 outlets**	
Special Rate [4/]	**0.6%**		**0.2%**		**2.9%**	
Activity Index [2/]	**10,330**		**11,480**		**42,330**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens			160	1.63	8,660	1.45
" - Toms			160	1.63	7,470	1.45
Frozen - Hens					3,750	1.11
" - Toms					3,660	1.02
PARTS:						
Breast:						
Bone-in, whole						
Fresh			160	2.75	2,290	2.49
Frozen	330	1.79	350	1.84	7,430	1.60
Split, bone-in						
Fresh						
Rotisserie	770	7.84	350	7.77	1,340	7.96
Boneless, whole	230	4.24	670	4.01	210	3.45
Cutlets	800	5.08	990	4.40	570	4.84
Cutlets, thin sliced	110	5.05				
Strips	20	3.99				
Tenders	530	4.88	910	4.18	260	4.79
Marinated Tenders	620	4.47	700	3.91	880	4.12
Drumsticks	170	1.99	50	2.36	30	1.61
Thighs	260	1.92	20	1.79	20	1.59
Wings	200	1.87	130	1.51	70	1.51
Necks	40	1.40	10	1.40	10	1.49
Smoked Drumsticks	30	1.99	100	2.20		
Smoked Wings	30	1.99	100	2.05	10	1.69
Smoked Necks			90	1.93	10	1.69
GROUND TURKEY:	**5,460**	**3.54**	**6,210**	**3.21**	**5,630**	**3.19**
Patties	400	3.29	500	3.76	550	3.05
Sausage	1,460	3.74	1,020	3.29	1,160	2.82
85% lean	920	2.34	1,380	2.47	1,060	2.23
93% lean	1,560	3.23	1,920	3.00	1,730	3.08
Breast	1,120	4.71	1,390	4.34	1,130	4.74
Rolls (frsh/frz 1 lb.)	160	2.52	50	2.51	10	1.00
Specialty [5/]						
Patties	20	4.99	200	4.11		
93-94% lean	310	4.62	60	5.63	20	3.29
Breast	240	7.39	10	5.39		

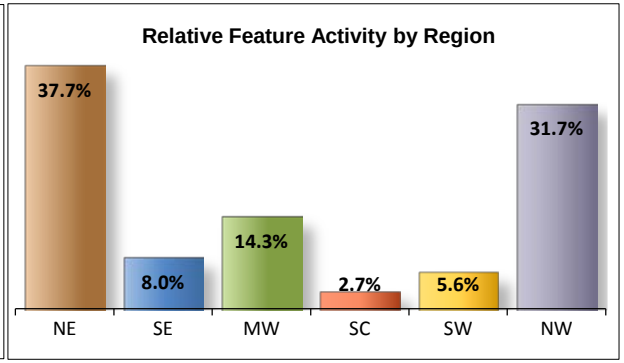
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail activity is lower this week. At this time last year we were heading into Easter, but we are a couple weeks past Easter this year. There is no interest in featuring whole turkeys. A few stores are offering frozen bone-in breasts. Rotisserie breasts are more prominent this week; prices are higher. Offers slow on boneless white parts. Cutlets are still active, just not as much as last week. Activity is sharply lower on tenders, slightly lower on marinated tenders. Prices trend higher on all boneless white parts. Fresh dark parts gain ad space; smoked dark parts are less available. Ground turkey is not as active. Offers increase on sausage, decrease on other grinds. Prices are higher on sausage, 93% lean and ground breast, lower on patties and 85% lean. Deli activity is slightly higher. Service deli Category 2 is more active on Processor Brands, less active on Private Brands; Category 3 activity increases on Processor and Private Brands. The big increase is on self-service deli. Processor and Private Brands are both more active; prices are higher on all self-service deli 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.

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(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/]	**63.0% of 4,400 sampled outlets**			**29.9% of 6,000 sampled outlets**			**32.1% of 4,000 sampled outlets**		
Special Rate [4/]	**2.9% 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 = 4,830**			**Activity Index = 1,470**			**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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57 - 1.97	30	1.74	1.29 - 1.97	200	1.94	1.48 - 1.69	100	1.50
Split, bone-in									
Fresh									
Rotisserie	5.99 - 7.99	500	7.76	7.99	70	7.99	7.99	70	7.99
Boneless, whole	3.99 - 5.49	190	4.29	3.99	40	3.99			
Cutlets	3.99 - 5.99	410	4.88	3.99 - 5.49	70	4.71	5.49	20	5.49
Cutlets, thin sliced	4.99	100	4.99						
Strips									
Tenders	3.99 - 5.49	160	4.09	3.99	40	3.99	4.99 - 5.49	40	5.22
Marinated Tenders	3.73 - 5.33	540	4.43				4.66 - 5.33	80	4.74
Drumsticks	1.99	160	1.99				1.98	10	1.98
Thighs	1.99	160	1.99				1.79 - 1.98	100	1.80
Wings	1.99	160	1.99	1.40	40	1.40			
Necks				1.40	40	1.40			
Smoked Drumsticks	1.99	20	1.99				1.99	10	1.99
Smoked Wings	1.99	20	1.99				1.99	10	1.99
Smoked Necks									
GROUND TURKEY:									
Patties	2.49 - 3.99	250	3.22	2.99 - 3.99	50	3.36	3.50 - 4.69	30	3.75
Sausage	3.11 - 4.49	630	3.67	2.99 - 4.49	520	4.19	2.80 - 3.84	60	2.98
85% lean	1.78 - 2.49	450	2.39	2.19 - 2.39	190	2.31	1.99 - 2.50	80	2.15
93% lean	2.84 - 4.29	430	3.42	2.99 - 3.00	20	2.99	2.74 - 3.99	480	3.41
Breast (99-100% lean)	4.61 - 5.99	620	5.06	4.16 - 4.63	190	4.21	3.90 - 4.31	270	4.16
Rolls (frsh/frz 1 lb.)							1.33 - 2.89	130	2.67
Specialty [5/]									
Patties	4.99	20	4.99						
93-94% lean	4.69 - 6.99	140	4.88				3.33 - 4.69	150	4.45
Breast	7.49	110	7.49				7.49	120	7.49

USDA Weekly Retail Turkey Feature Activity

Fri. Apr 20, 2012

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

	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/]	**6.2% of 4,000 sampled outlets**			**24.5% of 2,900 sampled outlets**			**35.0% 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 = 310**			**Activity Index = 490**			**Activity Index = 1,170**		
	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									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen									
Split, bone-in									
Fresh									
Rotisserie				7.99	130	7.99			
Boneless, whole									
Cutlets	3.99	20	3.99				5.49 - 5.69	280	5.50
Cutlets, thin sliced							5.69	10	5.69
Strips	3.99	20	3.99						
Tenders	3.99	20	3.99				5.49	270	5.49
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.99	30	2.99	3.50	40	3.50			
Sausage	2.99	20	2.99	2.50	30	2.50	3.27	200	3.27
85% lean				2.33	170	2.33	2.33 - 2.40	30	2.36
93% lean	2.78 - 3.59	170	3.05	2.80 - 3.19	90	3.02	2.39 - 3.19	370	2.91
Breast (99-100% lean)				5.19	30	5.19	5.49	10	5.49
Rolls (frsh/frz 1 lb.)	1.88	30	1.88						
Specialty [5/]									
Patties									
93-94% lean	3.99	20	3.99						
Breast				4.99	10	4.99			

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Apr 20, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/20 thru 04/26.

(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							
Feature Rate 1/	66.3% of 22,500 stores		77.9% of 22,500 stores		71.5% of 19,500 stores		87.5% of 4,400 sampled outlets			59.1% of 6,000 sampled outlets		
Activity Index 2/	43,510		43,150		37,770		Activity Index = 15,010			Activity Index = 10,070		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	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	5,040	8.06	4,840	8.14	4,490	7.63	6.97 - 9.99	2,650	7.84	6.59 - 8.99	1,110	7.79
Private Brand	2,440	7.74	2,680	7.03	3,390	7.47	6.99 - 8.99	2,040	7.81	6.99 - 7.99	70	7.88
Category 2												
Processor Brand	4,430	6.20	3,810	6.20	4,450	6.18	4.99 - 9.99	1,350	6.38	4.99 - 6.99	630	5.83
Private Brand	2,040	7.01	4,520	6.89	2,790	6.28	4.49 - 7.99	570	7.55	5.99 - 7.99	240	6.96
Category 3												
Processor Brand	1,130	4.12	1,110	3.95	1,440	4.05	3.97 - 4.99	350	4.16	3.99	30	3.99
Private Brand	2,830	4.95	1,340	5.62			4.98 - 4.99	320	4.99	3.99 - 4.99	2,390	4.98
Turkey Ham												
Processor Brand	240	3.11	600	3.48	160	2.87	2.99 - 3.99	80	3.42			
Private Brand												
Turkey Pastrami												
Processor Brand	190	4.14	380	4.14	170	3.99	3.59 - 4.99	100	4.30			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,150	7.58	5,190	7.26	2,050	7.85	5.99 - 9.99	1,140	7.78	6.99 - 8.99	40	8.22
Private Brand	840	7.06	570	6.85	470	7.37	6.99	730	6.99			
Category 2												
Processor Brand	490	6.40	90	4.70	220	6.49	4.98	20	4.98	5.99	210	5.99
Private Brand	160	5.99	610	5.81	190	5.82						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,480	3.00	7,080	2.92	7,400	3.17	2.49 - 4.00	2,380	3.20	2.19 - 3.99	1,950	2.69
Private Brand	3,730	2.75	1,910	2.64	1,860	2.83	2.48 - 3.50	560	2.89	2.50 - 3.50	870	2.81
Turkey 16 oz												
Processor Brand	380	5.85	770	5.41	1,550	4.33	5.99	40	5.99	5.99	100	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,620	2.97	5,740	2.92	5,410	3.31	2.49 - 4.00	2,120	3.12	2.50 - 3.99	1,770	2.71
Private Brand	3,320	2.77	1,910	2.64	1,730	2.82	2.48 - 3.50	560	2.89	2.50 - 3.50	660	2.91

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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	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)		
Feature Rate 1/	**78.5% of 4,000 sampled outlets**			**56.0% of 4,000 sampled outlets**			**53.3% of 2,900 sampled outlets**			**48.9% of 1,200 sampled outlets**		
Activity Index 2/	**Activity Index = 8,790**			**Activity Index = 5,300**			**Activity Index = 3,390**			**Activity Index = 950**		
	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 - 8.99	370	7.76	7.49 - 9.99	370	8.32	7.99 - 11.99	330	10.82	7.79 - 12.99	210	8.01
Private Brand	6.99 - 9.99	60	7.41	6.77 - 7.99	270	7.25						
Category 2												
Processor Brand	4.58 - 6.99	1,240	6.25	4.99 - 6.98	830	5.80	5.99 - 7.99	350	7.04	4.99 - 6.99	30	5.90
Private Brand	5.99 - 6.99	730	6.56	4.99 - 5.99	120	5.95	7.49	240	7.49	4.99 - 7.49	140	7.29
Category 3												
Processor Brand	2.98 - 4.99	370	4.09	2.99 - 4.99	240	4.29	2.99 - 3.79	120	3.71	3.98 - 4.99	20	4.29
Private Brand	3.99 - 4.99	120	4.16									
Turkey Ham												
Processor Brand	2.98 - 3.48	50	3.06	2.49 - 2.69	30	2.61	1.99 - 3.99	80	3.01			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 3.48	30	3.12				2.99 - 6.49	60	4.38			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 8.99	360	7.12	5.99 - 7.99	330	7.12	6.99	70	6.99	7.99 - 9.99	210	8.08
Private Brand	6.98 - 6.99	20	6.99	7.99	20	7.99				7.49	70	7.49
Category 2												
Processor Brand	4.98 - 6.99	220	6.82	6.99	40	6.99						
Private Brand	5.99	160	5.99									
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,610	3.06	2.00 - 2.77	910	2.91	2.99 - 3.49	560	3.16	2.50 - 2.98	70	2.91
Private Brand	2.50 - 3.49	1,030	2.73	2.50 - 3.00	690	2.61	2.50 - 3.49	510	2.79	2.50	70	2.50
Turkey 16 oz												
Processor Brand	5.77	170	5.77	5.49 - 5.99	70	5.76						
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.49 - 3.99	1,420	3.05	2.00 - 2.99	690	2.88	2.99 - 3.49	560	3.16	2.98	60	2.98
Private Brand	2.50 - 3.49	830	2.74	2.50 - 3.00	690	2.60	2.50 - 3.49	510	2.79	2.50	70	2.50

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)