

USDA Weekly Retail Turkey Feature Activity

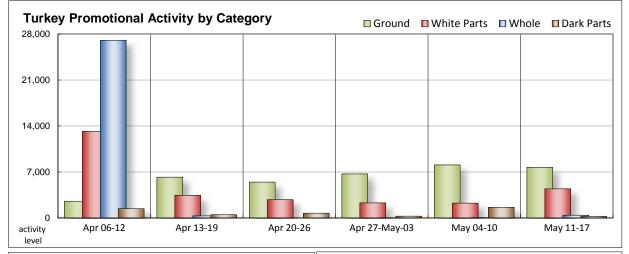
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/11 thru 05/17.

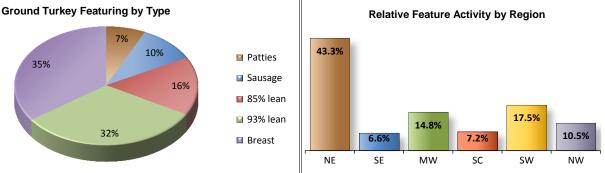
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

WHOLE BIRDS: Fresh - Hens 10 1.59 " - Toms - Toms 100 1.00 30 1.09 40 0	,500
Feature Rate 1/ 0.0% of 22,500 outlets outlets Special Rate 4/ 0.0% 2.1% 5.2% Activity Index 2/ 13,590 13,000 13,990 3/ Stores Wtd Avg Stores Wtd Avg Stores Wtd WHOLE BIRDS: Fresh - Hens 10 1.59 " - Toms Frozen - Hens 100 1.00 30 1.09 40 00 " - Toms 310 1.19 20 0.99 10 1 PARTS: Breast:	, 500
Special Rate Outlets Outlets Outlets	Avg
Special Rate 4 0.0% 2.1% 5.2%	1 Avg
Activity Index 2/ 13,590 13,000 13,990 3/ Stores Wtd Avg Stores Wtd Avg Stores Wtd WHOLE BIRDS: Fresh - Hens	.99
3/ Stores Wtd Avg Stores Wtd Avg Stores Wtd Avg Wtd Avg Stores Wtd	.99
WHOLE BIRDS: Fresh - Hens 10 1.59 " - Toms 100 1.00 30 1.09 40 0 Frozen - Hens 100 1.00 30 1.09 40 0 " - Toms 310 1.19 20 0.99 10 1 PARTS: Breast: Breast:	.99
" - Toms Frozen - Hens 100 1.00 30 1.09 40 0 " - Toms 310 1.19 20 0.99 10 1 PARTS: Breast:	
Frozen - Hens 100 1.00 30 1.09 40 00 1.00 1.00 1.00 1.00 1.00 1.00 1.0	
" - Toms 310 1.19 20 0.99 10 1 PARTS: Breast:	
PARTS: Breast:	.39
Breast:	
Bone-in, whole	
,	
Fresh 50 2.26 60 2.49	
, , , , , , , , , , , , , , , , , , , ,	.46
Split, bone-in	
	.12
	.59
Boneless, whole 400 3.99 60 5.99	
Cutlets 1,240 4.57 470 4.69 660 4	.39
Cutlets, thin sliced 20 4.49 190 4.99 80 4	.00
Strips 20 4.49 20 4.49	
Tenders 1,070 4.43 300 5.08 340 4	.79
Marinated Tenders 360 4.30 590 4.75 650 3	.96
Drumsticks 40 1.65 310 1.84 200 1	.50
	.82
Wings 60 1.51 330 2.04 200 1	.50
Necks 20 1.59 10 1	.49
	.33
9	.33
	.25
	.96
	.25
,	.91
· · · · · · · · · · · · · · · · · · ·	.02
	.84
	.27
	.16
Specialty 5/	
Patties 30 6.65 170 4.00	40
	.49
Breast 10 6.99 20 5.99 Note: rolls & specialty not included in ground turkey total and weighted average.	

This week's furkey reature nightights
This week retailers focus their attention on items associated with Mother's Day. Feature activity increases again. Whole bird offers are more
available this week, but continue to take a back seat to bone-in breasts. Fresh and frozen bone-in breasts are seen at lower prices. Rotisserie
breasts are more visible at higher pricing. Cutlet and whole tender offerings increase sharply, price levels are lower. Dark parts occupy less
circular space this week; fresh pricing is steady to lower, while smoked parts are mostly higher. Ground turkey advertisements decrease
slightly, but there are plenty of grilling options this week. Offers of ground breast garner most circular space, followed closely by 93% lean.
Ground breast prices decline, while 93% and 85% lean increase in value. Deli activity slows again this week. Offerings increase on private
labeled whole muscle meats, along with processor and private labeled slicing meats. Self-service deli items decrease this week.

This Wook's Turkey Feature Highlights





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 <u>any</u> 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.



Fri. May 11, 2012

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/11 thru 05/17.

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

	NORTI	HEAST U.S.		SOUT	HEAST U.S.		MIDV	MIDWEST U.S.		
	(CT,DE,MA,MD,M	E.NH.NJ.NY.PA	.RI.VT)	(AL.FL.GA.MS	S,NC,SC,TN,VA,\	NV)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 30.2% of 4,000 sampled outlets			
Feature Rate 1/	• • • • • • • • • • • • • • • • • • • •	0 sampled outle	,	, , , , ,	00 sampled outl					
Special Rate 4/	0.0% of stores w	•		0.0% of stores v	•		0.0% of stores w	•		
Activity Index 2/		Index = 6,780	otions		Index = 1,420	otions		-	Otions	
Activity index	Price Range	Summa	r) (Price Range		DEL C	Activity Index = 2,100 Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Summary Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		
	(4.1)		<u> </u>	(4.1.2.2.7)		<u> </u>	(4.1)		· J	
WHOLE BIRDS:										
Fresh - Hens	1.59	10	1.59							
" - Toms										
Frozen - Hens										
" - Toms				1.28	200	1.28	1.39	10	1.39	
PARTS:										
Breast:										
Bone-in, whole										
Fresh							1.99 - 2.49	20	2.22	
Frozen	0.99 - 1.97	70	1.51	1.29 - 1.97	300	1.80	1.29 - 1.89	360	1.73	
Split, bone-in										
Fresh	2.99	180	2.99							
Rotisserie	5.99 - 8.99	260	7.49	8.49	50	8.49	7.99	80	7.99	
Boneless, whole	3.99	400	3.99							
Cutlets	3.99 - 5.99	1,010	4.66	5.99	20	5.99				
Cutlets, thin sliced										
Strips										
Tenders	3.99 - 5.49	540	4.21				4.33 - 5.45	320	5.09	
Marinated Tenders	3.73 - 5.33	250	4.44	3.73 - 5.33	100	4.02	3.73	10	3.73	
Drumsticks				1.49	10	1.49	1.29 - 1.69	10	1.54	
Thighs	2.29	10	2.29							
Wings	1.29	20	1.29	1.39	10	1.39	1.29 - 1.69	10	1.54	
Necks	20		0				0			
Smoked Drumsticks				2.25	10	2.25				
Smoked Wings	1.99	70	1.99			_				
Smoked Necks	1.99	20	1.99	2.25	10	2.25				
GROUND TURKEY:										
Patties	2.99 - 4.99	250	3.97	3.19 - 3.99	40	3.80	2.69 - 3.99	50	3.38	
Sausage	3.11 - 3.99	440	3.35	2.99	10	2.99	2.40 - 3.79	240	2.99	
85% lean	2.33 - 3.19	1,140	2.98	2.33 - 3.19	40	2.82				
93% lean	2.68 - 3.45	1,570	3.10	2.80 - 3.45	420	3.06	2.49 - 3.19	320	2.97	
Breast (99-100% lean)	3.99 - 5.38	330	5.07	4.18	200	4.18	3.27 - 5.29	500	4.61	
Rolls (frsh/frz 1 lb.)							1.50 - 2.89	150	2.52	
Specialty 5/										
Patties	4.99 - 6.99	30	6.65							
93-94% lean	3.99 - 4.99	170	4.24				4.29	20	4.29	
Breast	6.99	10	6.99							





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

	SOUTH C	ENTRAL U.S.		SOUTHWEST U.S.					NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,	(CA,HI,NV) 40.8% of 2,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,810					(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/	16.0% of 4,00	0 sampled outlet						34.4% of 1,20	0 sampled ou	tlets		
Special Rate 4/	0.0% of stores w	no-price promo					0.0% of stores w/ no-price promotions					
Activity Index 2/		Index = 1,030						Activity Index = 450				
	Price Range	Summary			Price Range		Summary		Price Range	1	Summary	
	(\$/pound)	Stores W	/td Avg		ound)	Stores	Wtd Avg	1	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens					1.00	100	1.0	0				
" - Toms					1.00	100	1.0	0				
PARTS:												
Breast:												
Bone-in, whole												
Fresh									2.28 - 2.29	30	2.28	
Frozen	1.49 - 1.89	180	1.64		1.59	10	1.5	9	1.69	30	1.69	
Split, bone-in												
Fresh	2.99	20	2.99									
Rotisserie	2.49 - 7.99	90	6.80									
Boneless, whole												
Cutlets	4.49	20	4.49		3.99	190	3.9	9				
Cutlets, thin sliced	4.49	20	4.49									
Strips	4.49	20	4.49									
Tenders	3.99	20	3.99		3.99	190	3.9	9				
Marinated Tenders												
Drumsticks	1.79	20	1.79									
Thighs	1.79	20	1.79									
Wings	1.79	20	1.79									
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.49	30	3.49	3.49	- 3.50	170	3.5	0				
Sausage	2.99	40	2.99		4.29	20	4.2	9	4.29	40	4.29	
85% lean	2.70 - 2.87	30	2.82						2.78	20	2.78	
93% lean	2.99 - 3.33	60	3.02	2.79	- 3.49	90	3.0	9				
Breast (99-100% lean)	3.99 - 4.79	400	4.04	3.99	- 5.19	940	4.1	7	3.99	320	3.99	
Rolls (frsh/frz 1 lb.)	3.33	40	3.33						3.49	10	3.49	
Specialty ^{5/}												
Patties												
93-94% lean												
Breast				1								



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. May 11, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/11 thru 05/17.

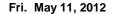
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

NATIONAL		ATIONAL	L SUMMARY				NORTHEA	AST U.S.	SOUTHE	SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	This Week 60.9% of 22,500 stores 37,900		Last Week 66.2% of 22,500 stores 42,850		Last Year 76.9% of 19,500 stores 46,230		(CT,DE,MA,MD,ME,N	H,NJ,NY,PA,RI,VT)	(AL,FL,GA,MS,N				
											·		
Feature Rate 1/							81.4% of 4,400 sa	ampled outlets	37.3% of 6,000	37.3% of 6,000 sampled outlets			
Activity Index 2/							Activity Inde	x = 12,740	Activity In	Activity Index = 5,930			
Activity index 2/	37,	900	42,	030	40,	,230	Price Range	Summary	Price Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores \	Ntd Avg		
SERVICE DELI - Turkey													
Category 1													
Processor Brand	4,140	8.06	4,950	7.41	6,680	7.77	5.98 - 9.99	1,820 8.31	5.99 - 9.49	1,270	8.08		
Private Brand	3,510	7.42	2,670	7.68	2,280	7.53	6.99 - 8.99	1,820 7.49	6.99	430	6.99		
Category 2													
Processor Brand	3,920	5.98	3,880	5.83	6,050	5.98	4.49 - 6.99	890 5.97	4.99 - 6.99	430	5.51		
Private Brand	4,340	6.69	3,430	7.61	2,550	6.31	5.00 - 6.99	1,850 6.64	4.98 - 6.99	270	6.62		
Category 3													
Processor Brand	1,180	3.82	1,170	3.91	1,170	4.09	2.99 - 5.98	210 3.73	4.49 - 4.99	100	4.66		
Private Brand	60	3.65	210	4.74			3.48	40 3.48	3.99	20	3.99		
Turkey Ham													
Processor Brand	270	3.54	610	3.63	390	3.81	3.99 - 4.99	100 4.65					
Private Brand													
Turkey Pastrami													
Processor Brand	370	4.36	370	4.24	450	3.65	3.59 - 4.99	110 4.13					
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,610	6.81	6,480	7.45	5,210	7.03	6.99 - 7.99	1,110 7.22	4.49 - 7.99	520	6.81		
Private Brand	2,210	6.62	820	7.43	670	7.18	5.99 - 7.49	1,690 6.75	4.40 7.00	020	0.01		
Category 2	2,210	0.02	020	7.10	0.0	7.10	0.00 7.10	1,000 0.70					
Processor Brand	260	6.25	240	5.75	600	6.74	4.98 - 5.99	40 5.32	6.49	210	6.49		
Private Brand	200	0.20	2-10	0.70	30	5.31	4.00 0.00	40 0.02	0.43	210	0.40		
SELF-SERVICE DELI					30	3.31							
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	6,310	3.39	7,420	3.23	7,350	3.31	2.49 - 3.99	1,450 3.34	2.25 - 3.99	1.160	3.26		
Private Brand	350	3.08	1,300	2.98	2,710	2.79	2.49 - 3.99	120 2.99	2.20 - 3.39	1,100	0.20		
Turkey 16 oz	550	5.00	1,500	2.30	2,710	2.13	2.55	120 2.99					
Processor Brand	1.190	5.48	750	5.91	1.020	5.06	4.99 - 6.99	130 6.80	4.99	430	4.99		
Private Brand	1,100	5.70	750	3.31	1,020	5.00	4.00 0.00	100 0.00	4.55	750	4.00		
Chicken 7-10 oz										+			
Processor Brand	5,830	3.41	7,250	3.23	6,340	3.34	2.49 - 3.99	1,240 3.34	2.25 - 3.99	1,090	3.30		
Private Brand	350	3.41	1,300	2.98		2.79	2.49 - 3.99	120 2.99	2.20 - 3.39	1,000	5.50		
i iivale biallu	550	5.00	1,500	2.90	2,730	2.13	2.33	120 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)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/11 thru 05/17.

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

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L/	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)
Feature Rate 1/	70.00/ -5.4.006	\	50 70/ -5 4 00/	9	00.00/ at 0.000 a smalled and total	77.00/ of 4.000 complete orders
-	•) sampled outlets	1	0 sampled outlets	68.0% of 2,900 sampled outlets	'
Activity Index 2/	Price Range	ndex = 8,440 Summary	Price Range	ndex = 4,690 Summary	Activity Index = 4,510 Price Range Summary	Activity Index = 1,590 Price Range Summary
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound) Stores Wtd Av	S ,
SERVICE DELI - Turkey	(4.1 /	3	(++ /	J	(V)	
Category 1						
Processor Brand	5.99 - 8.99	560 7.12	6.98 - 9.99	300 8.65	6.99 - 8.99 180 7.1	3 12.99 10 12.99
Private Brand	6.99 - 8.99	890 7.03	6.99 - 7.99	70 7.30	7.99 - 8.99 300 8.8	32
Category 2						
Processor Brand	4.48 - 6.99	1,640 5.83	4.99 - 6.99	430 6.14	5.99 - 7.99 280 7.2	
Private Brand	4.98 - 6.99	1,010 6.48	5.99 - 7.99	710 6.79	6.99 - 7.49 290 7.0	7.49 210 7.49
Category 3						
Processor Brand	2.99 - 3.99	410 3.75	3.49 - 4.99	300 3.81	2.99 - 3.99 130 3.4	9 3.98 - 4.99 30 4.20
Private Brand						
Turkey Ham Processor Brand	2.99	10 2.99	2.47	50 2.47	2.69 - 3.48 110 3.0	ne.
Private Brand	2.99	10 2.99	2.47	50 2.47	2.69 - 3.46	13
Turkey Pastrami						
Processor Brand	3.98 - 5.99	60 4.44	2.97 - 4.99	180 4.52		3.98 20 3.98
Private Brand	3.90 - 3.99	00 4.44	2.97 - 4.99	100 4.52		3.90 20 3.90
SERVICE DELI - Chicken						
Category 1 Processor Brand	4.99 - 8.99	710 7.01	4.99 - 7.99	860 6.48	5.99 - 8.49 400 6.0	08 6.49 10 6.49
Private Brand	5.99 - 8.99	500 6.12	7.99	20 7.99	3.99 - 8.49 400 6.0	0.49
Category 2	0.00 0.00	000 0.12	7.55	20 7.00		
Processor Brand	4.98	10 4.98				
Private Brand						
SELF-SERVICE DELI						
(dollars per tub or pouch)						
Turkey 7-10 oz						
Processor Brand	2.25 - 3.99	1,200 3.13	2.47 - 3.00	860 3.45	2.48 - 3.99 1,230 3.6	69 2.50 - 3.99 410 3.74
Private Brand	3.29 - 3.69	60 3.51			2.99 170 2.9	99
Turkey 16 oz						
Processor Brand	4.44 - 5.77	300 5.47	4.99 - 5.77	70 5.44	4.49 20 4.4	9 4.49 - 5.99 240 5.74
Private Brand						
Chicken 7-10 oz						
Processor Brand	2.25 - 3.99	1,020 3.13	2.47 - 3.00	840 3.46	2.48 - 3.99 1,230 3.6	
Private Brand	3.29 - 3.69	60 3.51			2.99 170 2.9	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)