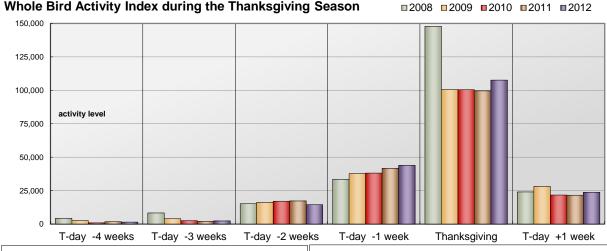
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/23 thru 11/29.

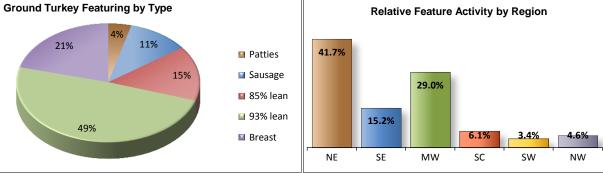
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY										
THIS WEEK LAST WEEK LAST YE										
Feature Rate 1/		of 22,500		of 22,500	28.1% of 19,500 outlets					
		tlets		tlets						
Special Rate 4/		1%		3%	2.6%					
Activity mack		,380		5,100	28,250 Stores Wtd Avg					
3/ WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg				
Fresh - Hens	5,560	1.56	17,380	1.60	5,010	1.54				
" - Toms	5,560		17,300		4,980	1.54				
Frozen - Hens										
	7,890		36,510		5,930	0.85				
" - Toms PARTS:	7,770	1.04	36,470	0.95	5,700	0.85				
_										
Breast:										
Bone-in, whole	000	0.00	4.040	0.40	4 470	0.75				
Fresh	800		4,210		1,470	2.75				
Frozen	3,260	1.85	14,710	1.80	2,810	1.80				
Split, bone-in				0.70						
Fresh			30		0.40	7.00				
Rotisserie	890		1,320		640	7.99				
Boneless, whole	10		30							
Cutlets	90	4.99	320	4.99	330	4.90				
Cutlets, thin sliced										
Strips										
Tenders			170	4.09						
Marinated Tenders	310	4.34	90	4.79	220	4.19				
Drumsticks	300	2.21	330	1.89	120	1.96				
Thighs	170	1.99	10	2.19						
Wings	180	2.03	360	1.87	120	1.96				
Necks			20	1.57	60	1.25				
Smoked Drumsticks			170		20	2.50				
Smoked Wings	30	1.75	200		20	2.50				
Smoked Necks	20		160		30	2.26				
GROUND TURKEY:	2,200		5,060		790	3.03				
Patties	90		630		10	3.99				
Sausage	240	3.81	740	3.44	410	3.26				
85% lean	330	2.67	860	2.71	270	2.37				
93% lean	1,080	3.21	2,210	3.17	80	3.08				
Breast	460		620		20	6.36				
Rolls (frsh/frz 1 lb.)	250		80							
Specialty 5/	-50		30							
Patties	20	6.19								
93-94% lean	70		160	4.25						
Breast		0		0						
Note: rolls & specialty n	ot included	d in ground	turkey tota	al and weig	hted avera	ge.				

This Week's Turkey Feature Highlights

Retail activity is light with many ads ending by Thanksgiving and new ads slow to appear. Next week's circulars will be back to a normal cycle. Offerings decline on fresh and frozen whole turkeys; feature activity is more active than the same week a year ago and prices are higher when compared to the previous year. Features on bone-in breast are less active compared to the previous week; compared to last year there are fewer ads for fresh and more ads for frozen. Promotions for rotisserie breasts are less active and prices are lower; the limited promotions on boneless white parts centers on marinated tenders. There are still plenty of ads featuring fresh drums, thighs and wings; few stores promote the smoked parts. Ground turkey is less actively promoted, mostly 93% lean; prices are higher on all the grinds except 85% lean. Offerings on deli items are fewer in number compared to last week. Service deli promotions are most active on whole muscle meats at lower prices. Self-service deli is most active on private brands; prices are mixed.





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.



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 23, 2012

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/23 thru 11/29.

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

	NORT	HEAST U.S.		SOUT	HEAST U.S.	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 34.0% of 4,000 sampled outlets 8.9% of stores w/ no-price promotions				
	(CT,DE,MA,MD,N	ME,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W					
Feature Rate 1/	55.0% of 4.40	00 sampled outlet	ts	22.0% of 6.0	00 sampled outle					
Special Rate 4/	0.0% of stores w	// no-price promo	tions	0.0% of stores	w/ no-price promo					
Activity Index ^{2/}		Index = 15,090			/ Index = 7,490		Activity Index = 9,530			
Activity index	Price Range	Summar	V	Price Range Summary			Price Range Summary			
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	0.89 - 1.89	2,030	1.45	1.29 - 1.98	1,350	1.66	1.18 - 1.99	1,350	1.63	
" - Toms	0.89 - 1.89	2,030	1.45	1.29 - 1.98	1,350	1.66	1.18 - 1.99	1,350	1.63	
Frozen - Hens	0.47 - 1.89	3,000	1.04	0.47 - 1.49	1,840	0.97	0.47 - 1.69	2,550	1.06	
" - Toms	0.47 - 1.89	3,000	1.04	0.47 - 1.49	1,730	0.98	0.47 - 1.69	2,540	1.07	
PARTS:					1,100			_,,		
Breast:										
Bone-in, whole										
Fresh	2.29 - 2.79	460	2.74	2.49	130	2.49	1.79 - 2.99	50	2.39	
Frozen	1.49 - 2.99	1,110	2.13	1.00 - 1.99	820	1.59	1.00 - 2.99	990	1.77	
Split, bone-in		1,110								
Fresh										
Rotisserie	6.99 - 8.99	400	7.48	7.49 - 7.99	140	7.86	7.99 - 8.99	350	8.00	
Boneless, whole	4.99	10	4.99							
Cutlets	4.99	90	4.99							
	4.55	30	4.55							
Cutlets, thin sliced										
Strips										
Tenders	400 470	040	4.04							
Marinated Tenders	4.26 - 4.79	310	4.34							
Drumsticks	1.99 - 2.49	300	2.21							
Thighs	1.99	170	1.99							
Wings	1.99 - 2.79	180	2.03							
Necks										
Smoked Drumsticks										
Smoked Wings				1.75	30	1.75				
Smoked Necks	1.99	20	1.99							
GROUND TURKEY:										
Patties	3.99	90	3.99							
Sausage	3.43 - 4.29	220	3.86				3.27	20	3.27	
85% lean	2.40 - 3.07	250	2.73				2.50	10	2.50	
93% lean	2.84 - 3.79	870	3.22	3.00 - 3.19	100	3.12	3.19 - 3.33	110	3.20	
Breast (99-100% lean)	3.99 - 6.15	460	5.04							
Rolls (frsh/frz 1 lb.)							1.95 - 2.79	210	2.57	
Specialty ⁵⁷										
Patties	4.99 - 6.99	20	6.19							
93-94% lean	4.00 - 4.49	70	4.18							
Breast	Marketing Service Poul									





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

	SOUTH C	ENTRAL U.S.	SOUT	HWEST U.S.	NORTHWEST U.S.				
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY) 12.8% of 1,200 sampled outlets 11.3% of stores w/ no-price promotions Activity Index = 450			
Feature Rate 1/	10.4% of 4,00	0 sampled outlets	8.0% of 2,90	0 sampled outle	ets				
Special Rate 4/	0.6% of stores w/	no-price promotions	6.4% of stores v	v/ no-price prom	otions				
Activity Index 2/		ndex = 2,020		y Index = 800					
,	Price Range	Summary	Price Range	Summary		Price Range		Summary	
	(\$/pound)	Stores Wtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	1.19 - 2.09	330 1.81	0.99 - 1.49	370	1.24	1.69	130	1.69	
" - Toms	1.19 - 2.09	330 1.81	0.99 - 1.49	370	1.24	1.69	130	1.69	
Frozen - Hens	0.39 - 0.97	490 1.12	0.85	10	0.85				
" - Toms	0.39 - 0.99	500 1.15							
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	30 2.99				2.59	130	2.59	
Frozen	1.58 - 1.99	300 1.78	1.00	10	1.00	1.27 - 1.69	30	1.39	
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties									
Sausage									
85% lean			2.40	40	2.40	2.62 - 2.63	30	2.62	
93% lean									
Breast (99-100% lean)									
Rolls (frsh/frz 1 lb.)	1.88 - 1.98	40 1.95							
Specialty 5/									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 23, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/23 thru 11/29.

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

	N	ATIONAL	SUMMAR	Υ			NORTHEAST U.S.		SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
- · · · · · · · · · · · · · · · · · · ·	27.7 % o	f 22,500	55.6% o	f 22,500	27.8% o	f 19,500						
Feature Rate 1/	sto	res	sto	res	sto	res	66.3% of 4,400 sampled outlets		27.8% of 6,000 sampled outlets			
Activity Index 2/	17	520	35,	260	12	660	Activity Ind	ex = 9,850		Activity Index = 3,610		
Activity index 2/	17,	320	35,	300	13,	000	Price Range	Summa	ary	Price Range Summary		ary
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores \	Ntd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	2,300	7.85	,	7.92	980	8.12	6.97 - 9.49	1,160	7.87	6.49 - 8.99	610	8.09
Private Brand	2,470	7.05	2,940	7.63	1,120	7.28	5.99 - 9.99	2,320	7.00	7.99	70	7.99
Category 2 Processor Brand	1.160	5.91	4.000	6.08	1,730	6.03	4.99 - 6.99	490	5.86	5.99 - 6.49	80	6.04
Private Brand	500	6.26	2,300	5.85	2,240	6.48	5.99 - 6.99	220	6.07	5.99 - 6.49	40	5.99
Category 3	300	0.20	2,500	5.00	2,240	0.40	0.00 - 0.00	220	0.07	0.55	40	3.33
Processor Brand	270	3.59	590	3.78	630	4.48	3.99	30	3.99	3.99	10	3.99
Private Brand	50	4.90	70	4.70	130	4.35	4.88	40	4.88	4.99	10	4.99
Turkey Ham				•								
Processor Brand	90	3.40	350	4.12	640	3.56	3.99	50	3.99			
Private Brand												
Turkey Pastrami												
Processor Brand	230	3.56	430	3.60	390	3.57	3.99	30	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,350	8.17	3,330	7.77	1,750	8.00	5.99 - 8.99	1,170	8.18	6.99 - 8.99	160	8.28
Private Brand	1,490	7.10	1,060	7.28	230	7.99	5.98 - 7.99	1,250	7.13			
Category 2												
Processor Brand	_	4.97	20	4.97	40	5.81	4.99	10	4.99			
Private Brand	80	5.98	1,720	5.11	70	5.99						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz	4 000	2.20	4.000	2.00	4 000	2.00	2.50	000	2.20	0.50 0.40	500	2.22
Processor Brand Private Brand	1,820 1,980	3.30	4,960 1,210	3.26 2.88	1,830 60	3.08 3.00	2.50 - 3.99 2.99 - 3.99	880 730	3.39 3.30	2.50 - 3.49 3.00 - 3.33	500 810	3.32 3.19
Turkey 16 oz	1,960	3.14	1,210	∠.00	60	3.00	2.33 - 3.33	730	3.30	3.00 - 3.33	010	3.19
Processor Brand	40	4.44	1,930	4.96	540	4.98				3.49 - 4.99	20	3.88
Private Brand	40	4.49	40	4.49	040	4.50				0.70 7.00	20	0.00
Chicken 7-10 oz	1.5			1.10								
Processor Brand	1,650	3.26	4,740	3.28	1,220	3.11	2.50 - 3.99	740	3.31	2.79 - 3.49	490	3.33
Private Brand	1,980	3.14	1,070	2.86	60	3.00	2.99 - 3.99	730	3.30	3.00 - 3.33	810	3.19

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

Fri. Nov 23, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/23 thru 11/29.

(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.	SOUTHW	/EST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L/	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)			
Feature Rate 1/		·	·	·		•	0.0% of 1,200 sampled outlets		
- Toutare Nate		sampled outlets		sampled outlets	· ·	sampled outlets			
Activity Index 2/		ndex = 2,690	•	Index = 940		ndex = 430	Activity Index = 0		
-	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range	Summary	
SERVICE DELI - Turkey	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	
Category 1									
Processor Brand	6.49 - 8.99	230 7.20	6.98 - 7.99	290 7.77	8.99	10 8.99			
Private Brand	6.99 - 9.99	80 7.91	0.00 7.00	200 7.17	0.00	10 0.55			
Category 2	0.00	7.01							
Processor Brand	4.95 - 6.99	410 5.77	4.99 - 6.98	180 6.32					
Private Brand	5.79 - 5.99	120 5.96	6.99	120 6.99					
Category 3									
Processor Brand	3.49 - 3.99	220 3.52	3.49	10 3.49					
Private Brand									
Turkey Ham									
Processor Brand					1.99 - 2.99	40 2.67			
Private Brand									
Turkey Pastrami									
Processor Brand	3.49	200 3.49							
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	6.99	20 6.99							
Private Brand	6.99	120 6.99	6.99	120 6.99					
Category 2									
Processor Brand	4.95	10 4.95							
Private Brand	5.98 - 5.99	50 5.99	5.98	30 5.98					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	2.49 - 3.99	210 3.10	3.00 - 3.50	40 3.41	3.00	190 3.00			
Private Brand	2.50 - 3.29	390 2.71	3.33	50 3.33					
Turkey 16 oz									
Processor Brand		40 4 45		20 4.99					
Private Brand	4.49	40 4.49							
Chicken 7-10 oz	0.40 0.00	000 044	0.40 0.50	20 2.52	2.00	400 000			
Processor Brand	2.49 - 3.99	200 3.11	3.49 - 3.50	30 3.50	3.00	190 3.00			
Private Brand	2.50 - 3.29	390 2.71	3.33	50 3.33			<u> </u>		

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)