



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/28 thru 01/03.**

Fri. Dec 28, 2012

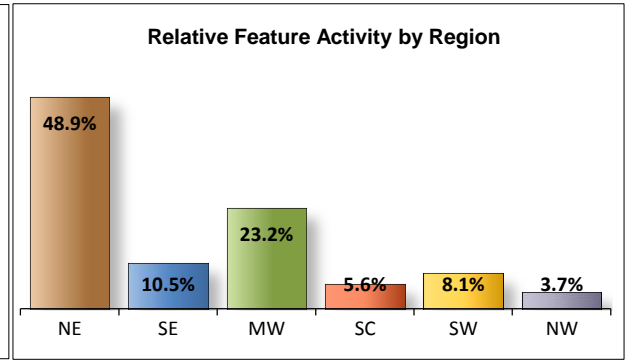
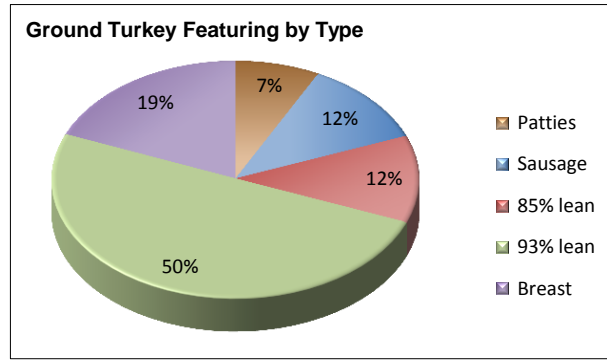
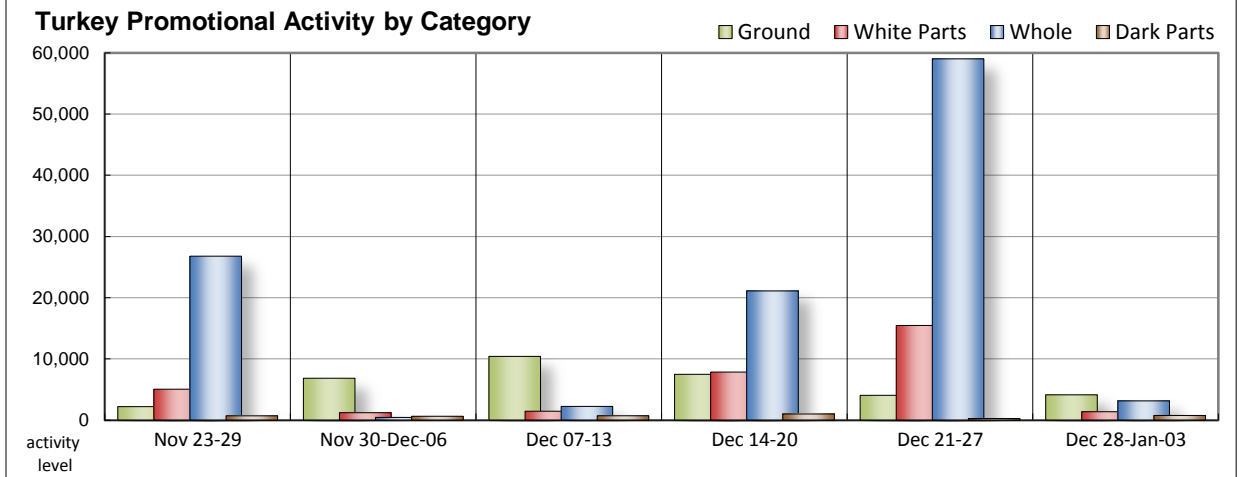
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>22.9% of 22,500 outlets</b>		<b>84.6% of 22,500 outlets</b>		<b>24.8% of 22,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>2.2%</b>		<b>1.4%</b>		<b>0.3%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>10,450</b>		<b>79,850</b>		<b>8,700</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens	430	1.58	14,670	1.72	100	1.81
" - Toms	430	1.58	14,870	1.72	100	1.81
Frozen - Hens	1,200	1.21	14,930	1.08	660	1.27
" - Toms	1,080	1.22	14,540	1.08	670	1.37
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	180	2.32	2,690	2.75	280	2.55
Frozen	840	2.48	11,650	1.66	510	2.01
Split, bone-in						
Fresh					10	1.99
Rotisserie	60	7.32	800	8.56	990	7.72
Boneless, whole			70	4.75	50	4.65
Cutlets	150	5.43	250	5.05	220	4.94
Cutlets, thin sliced					20	5.99
Strips						
Tenders	140	4.84			70	3.99
Marinated Tenders	960	4.25	240	4.26	400	3.92
Drumsticks	60	1.66	40	2.17	150	1.87
Thighs			30	2.26		
Wings	60	1.66	40	2.17	100	1.95
Necks	50	1.69	10	1.99		
Smoked Drumsticks	200	1.92	40	2.06	200	2.46
Smoked Wings	190	1.80	60	1.91	200	2.46
Smoked Necks	200	1.79	40	2.06	190	1.99
<b>GROUND TURKEY:</b>	<b>4,130</b>	<b>3.52</b>	<b>4,050</b>	<b>3.40</b>	<b>3,720</b>	<b>2.58</b>
Patties	310	3.52	380	3.31	180	3.10
Sausage	480	3.35	270	3.31	560	3.16
85% lean	490	2.54	230	2.32	1,930	1.84
93% lean	2,070	3.25	2,420	3.23	590	3.12
Breast	780	5.03	750	4.75	460	4.46
Rolls (frsh/frz 1 lb.)	30	1.76	550	2.57	40	2.05
<b>Specialty</b> <sup>5/</sup>						
Patties			120	4.94		
93-94% lean	60	5.10	100	4.29	20	3.99
Breast			60	6.32		

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

**This Week's Turkey Feature Highlights**

Retail feature activity slows heading into the New Year. Offerings on whole birds are less active; prices decline on fresh, increase on frozen. More stores promote whole turkeys this week compared to the same week a year ago, indicating more carryover product. Offerings are less active on fresh and frozen bone-in breasts; prices are lower on fresh, sharply higher on frozen. Rotisserie breasts practically disappear from the ad pages. Shoppers looking for boneless white parts will find mostly marinated tenders at fairly steady prices. Offerings increase on dark parts, especially smoked parts; prices are lower. Ground turkey promotions are slightly more active; the weighted average price is higher. The 93% lean is the most actively promoted grind. Deli feature activity declines on service and self-service deli items. Service deli promotions are more active on the less expensive thin slicing meats and deli shaving meats. Fewer stores are promoting the self-service processor brands and instead are featuring their private brands. Deli platters are heavily promoted for New Year gatherings, party time!



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 <sup>1/</sup>	50.5% of 4,400 sampled outlets			14.0% of 6,000 sampled outlets			30.1% of 4,000 sampled outlets		
Special Rate <sup>4/</sup>	6.1% of stores w/ no-price promotions			3.3% of stores w/ no-price promotions			0.7% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 5,340			Activity Index = 1,560			Activity Index = 2,300		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.49 - 1.59	190	1.50	1.49 - 1.59	100	1.55	1.59	100	1.59
" - Toms	1.49 - 1.59	190	1.50	1.49 - 1.59	100	1.55	1.59	100	1.59
Frozen - Hens	0.58 - 1.79	450	1.31	0.59 - 1.49	400	1.09	0.97 - 1.49	280	1.22
" - Toms	0.99 - 1.79	430	1.37	0.59 - 1.49	300	1.12	0.97 - 1.49	180	1.35
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	1.99 - 3.49	170	2.34				1.89 - 2.19	10	2.00
Frozen	1.59 - 4.99	360	3.48	1.29 - 1.99	100	1.82	1.49 - 1.99	380	1.70
Split, bone-in									
Fresh									
Rotisserie	6.89 - 8.99	50	7.19				7.99	10	7.99
Boneless, whole									
Cutlets	4.99 - 5.45	140	5.42						
Cutlets, thin sliced									
Strips									
Tenders	4.79	130	4.79						
Marinated Tenders	3.73 - 4.79	740	4.19	4.26 - 4.66	170	4.51	4.99	20	4.99
Drumsticks				1.69	50	1.69	1.49	10	1.49
Thighs									
Wings				1.69	50	1.69	1.49	10	1.49
Necks				1.69	50	1.69			
Smoked Drumsticks	1.48 - 1.99	160	1.97						
Smoked Wings	1.79 - 1.99	160	1.81	1.75	30	1.75			
Smoked Necks	1.79 - 1.99	160	1.81						
<b>GROUND TURKEY:</b>									
Patties	3.99	20	3.99	3.50	50	3.50	3.49	170	3.49
Sausage	2.94 - 4.29	240	3.79				2.91	170	2.91
85% lean	2.33 - 2.92	90	2.75	2.49	10	2.49	2.33 - 2.74	350	2.50
93% lean	2.98 - 3.84	930	3.33	3.19 - 3.50	150	3.35	2.91 - 3.84	450	3.03
Breast (99-100% lean)	4.61 - 5.38	690	5.07				3.19	20	3.19
Rolls (frsh/frz 1 lb.)							1.50	20	1.50
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean	5.99	40	5.99				3.33	20	3.33
Breast									



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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)		
<b>Feature Rate</b> <sup>1/</sup>	9.4% of 4,000 sampled outlets			15.9% of 2,900 sampled outlets			5.5% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 560			Activity Index = 580			Activity Index = 110		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens				1.69 - 1.99	40	1.94			
" - Toms				1.69 - 1.99	40	1.94			
Frozen - Hens	0.97	30	0.97	1.49 - 1.59	40	1.52			
" - Toms	0.58 - 0.97	130	0.67	1.49 - 1.59	40	1.52			
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh									
Frozen									
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets							5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders							5.45	10	5.45
Marinated Tenders							3.33 - 3.99	30	3.72
<b>DRUMSTICKS:</b>									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks	1.69	40	1.69						
Smoked Wings									
Smoked Necks	1.69	40	1.69						
<b>GROUND TURKEY:</b>									
Patties	3.49 - 3.50	70	3.49						
Sausage	2.91 - 2.99	60	2.93				2.89	10	2.89
85% lean				2.40	40	2.40			
93% lean	2.74 - 3.19	180	2.92	2.80 - 3.99	350	3.43	3.59	10	3.59
Breast (99-100% lean)	4.16	10	4.16	6.07	30	6.07	4.39	30	4.39
Rolls (frsh/frz 1 lb.)							2.29	10	2.29
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



**USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/28 thru 01/03.

(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		74.6% of 4,400 sampled outlets			51.5% of 6,000 sampled outlets		
Feature Rate <sup>1/</sup>	61.1% of 22,500 stores		65.7% of 22,500 stores		60.0% of 22,500 stores		Activity Index = 10,110			Activity Index = 5,790		
Activity Index <sup>2/</sup>	34,360		42,850		37,740		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						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	3,540	7.90	3,280	8.13	5,730	7.84	5.88 - 9.99	1,690	8.00	6.99 - 8.99	830	7.86
Private Brand	1,780	7.80	2,100	7.69	3,380	7.91	6.99 - 7.99	1,300	7.71	7.49 - 7.99	130	7.56
<b>Category 2</b>												
Processor Brand	3,040	5.94	3,310	6.13	3,460	5.73	4.98 - 6.99	710	5.86	4.98 - 5.99	300	5.77
Private Brand	2,780	6.67	1,870	6.22	1,280	5.85	4.99 - 6.99	220	6.71	5.99	70	5.99
<b>Category 3</b>												
Processor Brand	440	3.87	1,390	4.41	460	4.25	3.99 - 4.98	70	4.15	3.99 - 4.49	70	4.16
Private Brand	120	4.99	1,370	4.97	470	5.37						
<b>Turkey Ham</b>												
Processor Brand	230	3.92	570	4.88	220	3.51	3.99 - 4.49	190	4.12			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	170	3.99	230	3.12	120	4.58	3.99	170	3.99			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	1,370	7.18	2,000	7.56	2,580	7.43	5.99 - 9.49	690	7.82	6.99 - 7.99	60	7.73
Private Brand	1,120	7.71	450	7.93	1,370	7.21	6.99 - 7.99	880	7.67	7.49	70	7.49
<b>Category 2</b>												
Processor Brand	50	5.22	80	4.99	580	5.82	4.98 - 4.99	20	4.98			
Private Brand	160	5.99	1,690	5.13								
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	6,400	3.16	11,030	3.20	7,380	3.13	2.50 - 3.99	1,320	3.39	1.79 - 3.99	1,970	2.90
Private Brand	2,700	2.86	980	2.79	2,190	3.06	2.50 - 3.50	910	2.90	2.69 - 3.99	140	3.44
<b>Turkey 16 oz</b>												
Processor Brand	1,550	4.20	600	4.98	210	5.09	3.99	90	3.99	3.99	40	3.99
Private Brand	350	4.78	270	6.60			6.29	120	6.29			
<b>Chicken 7-10 oz</b>												
Processor Brand	6,040	3.12	10,650	3.20	6,690	3.14	2.50 - 3.99	1,000	3.36	1.79 - 3.99	1,970	2.90
Private Brand	2,520	2.86	980	2.79	1,620	3.08	2.50 - 3.50	730	2.88	2.69 - 3.99	140	3.44

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 <sup>1/</sup>	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)		
	65.7% of 4,000 sampled outlets			55.3% of 4,000 sampled outlets			57.7% of 2,900 sampled outlets			70.9% of 1,200 sampled outlets		
	Activity Index = 6,850			Activity Index = 5,800			Activity Index = 4,150			Activity Index = 1,660		
Activity Index <sup>2/</sup>	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	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 10.49	480	7.33	6.98 - 9.99	340	8.27	7.99 - 8.99	190	8.03	8.49	10	8.49
Private Brand	7.99	140	7.99	6.99 - 8.49	90	7.67	8.99	120	8.99			
<b>Category 2</b>												
Processor Brand	4.95 - 6.99	1,000	6.04	4.99 - 6.99	420	5.76	5.99	330	5.99	5.99 - 6.99	280	6.16
Private Brand	5.49 - 6.99	1,090	6.26	4.99 - 7.49	660	6.18	7.49 - 7.99	660	7.77	7.49	80	7.49
<b>Category 3</b>												
Processor Brand	2.88 - 4.49	60	3.53	3.49 - 4.49	120	3.95	2.99	30	2.99	2.50 - 3.99	90	3.85
Private Brand					120	4.99						
<b>Turkey Ham</b>												
Processor Brand							2.99	40	2.99			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand												
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4.99 - 6.99	440	5.81	5.99 - 9.49	150	8.05	6.99	10	6.99	2.50 - 10.99	20	6.99
Private Brand	6.98 - 9.99	30	8.32	7.99	20	7.99	7.99	120	7.99			
<b>Category 2</b>												
Processor Brand	4.98 - 5.99	30	5.38									
Private Brand	5.99	160	5.99									
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.50 - 3.99	770	3.09	2.50 - 3.00	1,160	3.18	2.49 - 3.99	770	3.27	2.99 - 3.99	410	3.53
Private Brand	2.69 - 3.99	840	2.91	2.50 - 2.99	510	2.76	2.50 - 2.79	280	2.54	2.79	20	2.79
<b>Turkey 16 oz</b>												
Processor Brand	3.99	200	3.99	3.99 - 5.99	350	4.91	3.99	550	3.99	3.99	320	3.99
Private Brand					230	3.99						
<b>Chicken 7-10 oz</b>												
Processor Brand	2.50 - 3.99	770	3.09	2.50 - 2.99	1,120	3.09	2.49 - 3.99	770	3.27	2.99 - 3.99	410	3.53
Private Brand	2.69 - 3.99	840	2.91	2.50 - 2.99	510	2.76	2.50 - 2.79	280	2.54	2.79	20	2.79

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)