



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/30 thru 01/05.**

Fri. Dec 30, 2011

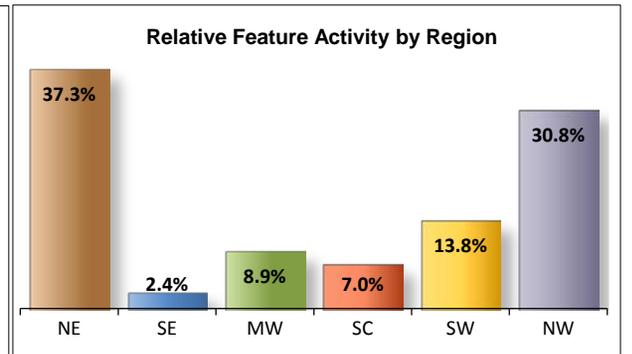
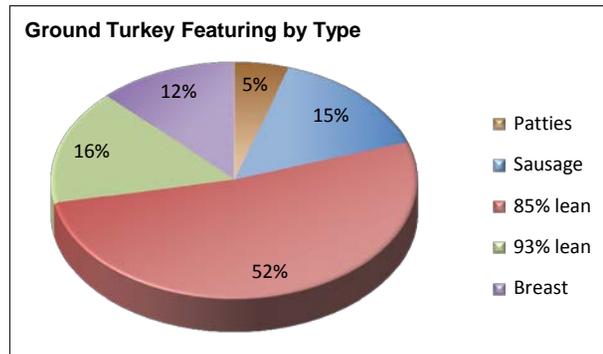
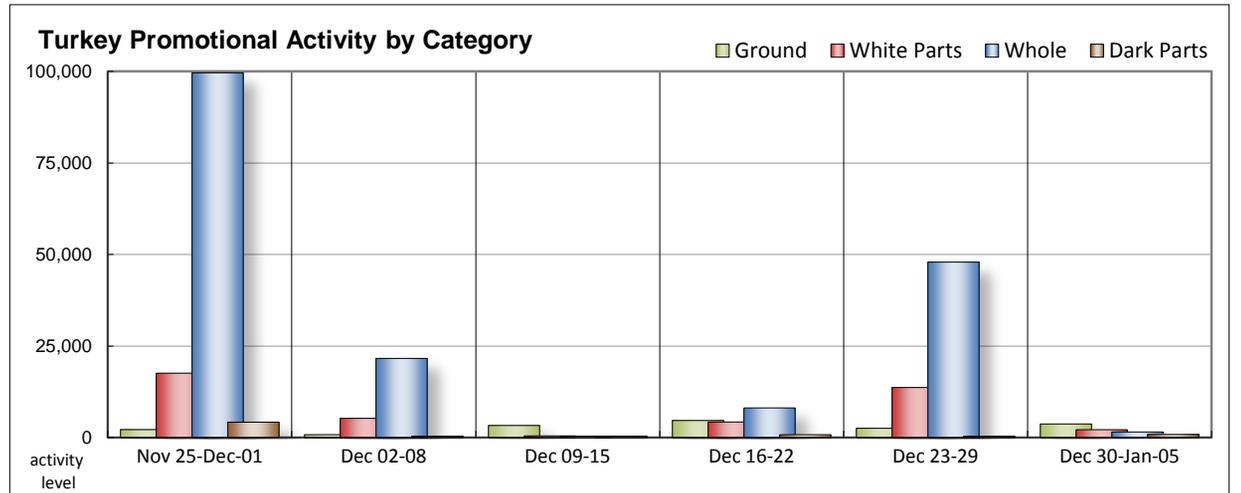
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>24.8% of 22,500 outlets</b>		<b>78.4% of 19,500 outlets</b>		<b>23.4% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>0.3%</b>		<b>1.9%</b>		<b>1.2%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>8,700</b>		<b>66,540</b>		<b>10,210</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	100	1.81	12,410	1.55	200	1.45
" - Toms	100	1.81	12,440	1.55	170	1.44
Frozen - Hens	660	1.27	13,330	1.05	670	1.05
" - Toms	670	1.37	12,810	1.05	670	1.03
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	280	2.55	2,220	2.65	40	2.45
Frozen	510	2.01	9,630	1.80	210	1.86
Split, bone-in						
Fresh	10	1.99	10	1.99	100	4.26
Rotisserie	990	7.72	890	8.18	1,010	7.43
Boneless, whole	50	4.65			10	5.45
Cutlets	220	4.94	400	4.99	380	4.52
Cutlets, thin sliced	20	5.99				
Strips						
Tenders	70	3.99			550	4.55
Marinated Tenders	400	3.92	170	4.46	190	3.89
Drumsticks	150	1.87	390	1.81	170	1.67
Thighs			30	2.75	10	1.89
Wings	100	1.95	390	1.82	180	1.67
Necks			90	1.79	10	1.29
Smoked Drumsticks	200	2.46	20	2.59	160	2.31
Smoked Wings	200	2.46	50	2.08	160	2.31
Smoked Necks	190	1.99	30	1.76	150	2.31
<b>GROUND TURKEY:</b>	<b>3,720</b>	<b>2.58</b>	<b>840</b>	<b>3.77</b>	<b>4,490</b>	<b>2.95</b>
Patties	180	3.10			220	3.01
Sausage	560	3.16	220	3.95	700	2.78
85% lean	1,930	1.84	150	2.77	650	2.11
93% lean	590	3.12	190	2.84	1,320	2.65
Breast	460	4.46	280	4.79	1,600	3.60
Rolls (frsh/frz 1 lb.)	40	2.05	20	1.62	480	1.61
<b>Specialty</b> <sup>5/</sup>						
Patties						
93-94% lean	20	3.99	350	4.25	10	3.49
Breast			20	5.49	190	5.08

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

**This Week's Turkey Feature Highlights**

Retail activity slows on turkey and deli items; we won't see large numbers of turkeys again until the next holiday season in the spring. Post-holiday whole body turkey ads are light with holdover turkeys featured at mostly higher prices. Offers are lighter on fresh and frozen bone-in breasts; prices are lower on fresh, higher on frozen. Rotisserie breasts are more available and prices are lower. A wider selection of boneless white parts is featured this week. Prices trend lower on cutlets and marinated tenders. Last week the dark parts were most active, this week smoked parts take the lead. More stores are showing ground turkey going into the first of the year; the weighted average price is sharply lower. The 85% lean has the most ad space and is priced to fit shoppers' tight post-holiday budgets. Deli activity slows. Offers on service deli Category 1 increase and outnumber Category 2 promotions. Prices on Category 1 and Category 2 processor brands are lower; on private brands Category 1 is higher, Category 2 is lower. Self-service deli gets more ad space; 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 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)		
<b>Feature Rate</b> <sup>1/</sup>	57.1% of 4,400 sampled outlets			9.3% of 6,000 sampled outlets			14.8% of 4,000 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	1.3% 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 = 4,480			Activity Index = 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	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.69 - 1.99	100	1.81						
" - Toms	1.69 - 1.99	100	1.81						
Frozen - Hens	1.09 - 1.69	210	1.23				0.99 - 1.19	170	1.18
" - Toms	1.39 - 1.69	220	1.55				0.99 - 1.19	170	1.18
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.69 - 2.99	150	2.92				1.99 - 2.99	130	2.13
Frozen	1.89 - 2.29	310	2.11				1.89	130	1.89
Split, bone-in									
Fresh							1.99	10	1.99
Rotisserie	5.99 - 7.99	870	7.63	7.99 - 8.49	110	8.20			
Boneless, whole									
Cutlets	3.99 - 4.99	50	4.65				3.99	10	3.99
Cutlets, thin sliced	4.99	210	4.99						
	5.99	20	5.99						
Strips									
Tenders									
Marinated Tenders	3.73 - 4.26	340	4.02				3.19 - 3.73	60	3.35
Drumsticks									
	1.69 - 1.99	140	1.89				1.59	10	1.59
Thighs									
Wings	1.99	90	1.99				1.59	10	1.59
Necks									
Smoked Drumsticks	2.39 - 2.49	190	2.49				1.88	10	1.88
Smoked Wings	2.39 - 2.49	190	2.49				1.88	10	1.88
Smoked Necks	1.99	190	1.99						
<b>GROUND TURKEY:</b>									
Patties	3.19	120	3.19	2.79	50	2.79	3.50	10	3.50
Sausage	2.39 - 3.99	360	2.73	3.99	190	3.99	2.80	10	2.80
85% lean	1.67 - 2.40	310	2.11	1.67	40	1.67	1.67 - 2.79	180	2.16
93% lean	3.07 - 3.19	130	3.18				2.80 - 3.19	10	3.01
Breast (99-100% lean)	4.61	180	4.61				3.99	10	3.99
Rolls (frsh/frz 1 lb.)									
							1.50	10	1.50
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean							3.99	20	3.99
Breast									



**USDA Weekly Retail Turkey Feature Activity**

(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)		
<b>Feature Rate</b> <sup>1/</sup>	12.8% of 4,000 sampled outlets			33.6% of 2,900 sampled outlets			35.4% 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 = 760			Activity Index = 1,090			Activity Index = 1,010		
	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									
" - Toms									
Frozen - Hens	0.99 - 1.09	50	1.08	0.89	30	0.89	1.49	200	1.49
" - Toms	0.99 - 1.09	50	1.08	0.89	30	0.89	1.49	200	1.49
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.59 - 1.89	70	1.82						
Split, bone-in									
Fresh									
Rotisserie				9.99	10	9.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				3.99	70	3.99			
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties									
Sausage									
85% lean	1.67	360	1.67	1.67 - 2.33	720	1.82	1.67	320	1.67
93% lean	2.98 - 3.28	210	2.99	3.19	150	3.19	3.19 - 3.29	90	3.20
Breast (99-100% lean)				3.19	70	3.19	4.79	200	4.79
Rolls (frsh/frz 1 lb.)	2.59	20	2.59	1.50	10	1.50			
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

Fri. Dec 30, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/30 thru 01/05.

(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		85.1% of 4,400 sampled outlets Activity Index = 11,700			56.4% of 6,000 sampled outlets Activity Index = 9,040		
Feature Rate <sup>1/</sup>	60.0% of 22,500 stores		56.6% of 19,500 stores		73.0% of 19,500 stores							
Activity Index <sup>2/</sup>	37,740		30,460		40,500							
	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
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5,730	7.84	3,560	8.13	4,840	7.13	6.49 - 9.49	2,580	8.08	6.99 - 9.49	990	7.48
Private Brand	3,380	7.91	3,670	6.84	3,210	7.42	6.99 - 7.99	2,240	7.87			
<b>Category 2</b>												
Processor Brand	3,460	5.73	4,710	6.29	2,880	5.40	3.99 - 6.99	780	5.78	4.99 - 5.99	470	5.83
Private Brand	1,280	5.85	3,470	6.68	3,850	5.72	3.99 - 6.99	710	5.87	5.49 - 6.99	180	6.22
<b>Category 3</b>												
Processor Brand	460	4.25	260	3.73	1,130	4.38	4.99	30	4.99	2.98 - 4.99	150	4.32
Private Brand	470	5.37	110	4.80	250	4.44						
<b>Turkey Ham</b>												
Processor Brand	220	3.51	280	3.67	330	3.03	2.69 - 4.49	150	3.57			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	120	4.58	430	3.92	450	3.45	3.49 - 4.99	80	4.12			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,580	7.43	2,070	7.23	3,790	7.32	5.99 - 8.99	1,330	7.75	7.99 - 8.99	120	8.93
Private Brand	1,370	7.21	2,230	7.33	160	6.71	6.99 - 7.99	880	7.57	5.99 - 6.99	140	6.41
<b>Category 2</b>												
Processor Brand	580	5.82	260	6.67	160	4.95	4.99 - 5.99	20	5.36	5.99	220	5.99
Private Brand												
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	7,380	3.13	3,460	3.23	7,620	2.96	2.50 - 3.99	840	3.38	1.99 - 3.79	2,900	2.90
Private Brand	2,190	3.06	490	3.45	1,690	3.24	3.00 - 3.49	870	3.16	2.99 - 3.00	650	2.99
<b>Turkey 16 oz</b>												
Processor Brand	210	5.09	1,790	4.94	1,400	4.99	5.99	40	5.99	5.99	20	5.99
Private Brand					120	2.88						
<b>Chicken 7-10 oz</b>												
Processor Brand	6,690	3.14	3,180	3.26	6,820	2.99	2.50 - 3.99	790	3.39	1.99 - 3.79	2,610	2.87
Private Brand	1,620	3.08	490	3.45	1,800	3.25	3.29 - 3.49	360	3.40	2.99 - 3.00	590	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 <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)		
	60.0% of 4,000 sampled outlets			55.3% of 4,000 sampled outlets			36.7% of 2,900 sampled outlets			57.8% of 1,200 sampled outlets		
	Activity Index = 6,880			Activity Index = 5,130			Activity Index = 2,990			Activity Index = 2,000		
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	6.78 - 9.98	1,190	7.49	5.99 - 7.99	700	8.10	8.99	30	8.99	6.98 - 12.99	240	7.69
Private Brand	7.99	30	7.99				7.99	1,110	7.99			
<b>Category 2</b>												
Processor Brand	4.49 - 6.99	1,300	5.67	4.99 - 5.99	480	5.39	4.99	170	4.99	5.98 - 6.99	260	6.85
Private Brand	4.99 - 6.99	390	5.63									
<b>Category 3</b>												
Processor Brand	2.99 - 4.99	140	4.56	3.49 - 4.49	80	3.99	2.99	40	2.99	3.99	20	3.99
Private Brand	3.99 - 5.49	100	4.83	3.99	60	3.99				5.49 - 5.99	310	5.81
<b>Turkey Ham</b>												
Processor Brand	2.99	20	2.99	2.49	10	2.49	2.49 - 3.99	40	3.82			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	6.98	10	6.98	4.99	30	4.99						
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.98 - 7.98	890	6.83	5.99 - 8.49	240	7.14						
Private Brand	5.99 - 6.99	350	6.62									
<b>Category 2</b>												
Processor Brand	3.98 - 5.99	300	5.70	5.99	40	5.99						
Private Brand												
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.50 - 3.99	970	2.98	1.49 - 2.69	1,270	3.12	3.50	800	3.50	3.00 - 4.00	600	3.66
Private Brand	2.79 - 3.69	200	3.25	2.79 - 3.00	470	2.87						
<b>Turkey 16 oz</b>												
Processor Brand	4.78 - 5.99	20	5.42	3.99 - 4.99	130	4.62						
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.50 - 3.99	770	3.10	2.00 - 2.79	1,150	3.12	3.50	800	3.50	3.00 - 4.00	570	3.64
Private Brand	2.79 - 3.69	200	3.25	2.79 - 3.00	470	2.87						

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)