USDA Weekly Retail Turkey Feature Activity

Fri. Jan 13, 2012

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/13 thru 01/19.

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

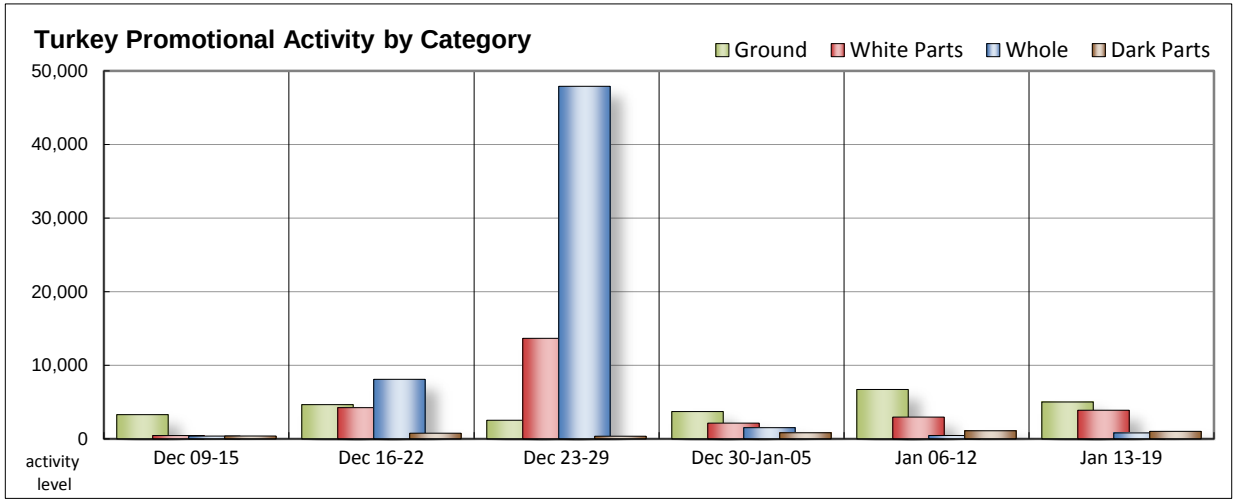
NATIONAL SUMMARY

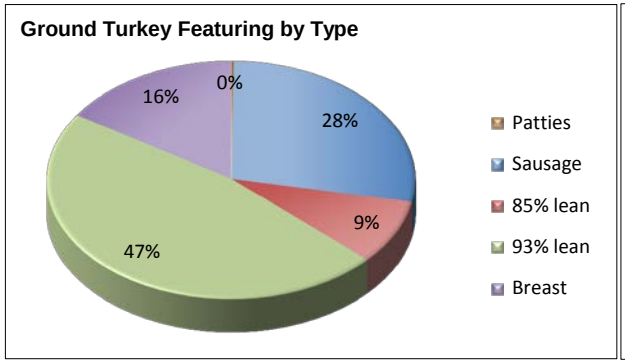
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	43.3% of 22,500 outlets		33.9% of 22,500 outlets		47.9% of 19,500 outlets	
Special Rate 4/	7.4%		2.6%		2.1%	
Activity Index 2/	12,610		12,520		18,770	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens			250	1.51	270	1.29
" - Toms	820	1.47	220	1.48	140	1.29
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.48	40	2.69	50	2.26
Frozen	970	1.88	820	2.03	940	1.51
Split, bone-in						
Fresh	20	2.64			190	2.46
Rotisserie	770	8.55	280	7.36	1,300	7.65
Boneless, whole	10	5.99	170	5.45	280	3.96
Cutlets	1,330	4.69	1,230	4.95	550	4.36
Cutlets, thin sliced			140	4.92	230	4.49
Strips						
Tenders	780	4.62	290	4.12	90	4.56
Marinated Tenders	1,310	4.24	480	4.05	870	4.01
Drumsticks	330	1.48	330	1.71	870	1.42
Thighs	130	1.50	10	1.99	180	1.53
Wings	360	1.51	380	1.68	880	1.48
Necks	50	1.69	10	1.69	20	1.25
Smoked Drumsticks	50	2.02	130	2.11	20	2.39
Smoked Wings	50	2.02	130	2.35		
Smoked Necks	60	1.99	120	1.90		
GROUND TURKEY:	**5,020**	**3.20**	**6,720**	**3.47**	**11,100**	**2.68**
Patties	10	2.99	500	3.61	640	2.93
Sausage	1,400	3.41	700	3.27	1,740	2.85
85% lean	440	2.35	290	2.46	3,840	2.22
93% lean	2,370	2.95	2,770	3.02	3,490	2.54
Breast	800	4.12	2,460	4.26	1,390	3.99
Rolls (frsh/frz 1 lb.)	90	1.66	440	2.03	480	1.14
Specialty 5/						
Patties	10	4.99				
93-94% lean	410	4.29	320	4.44	280	3.92
Breast	20	5.99	10	5.99	30	5.99

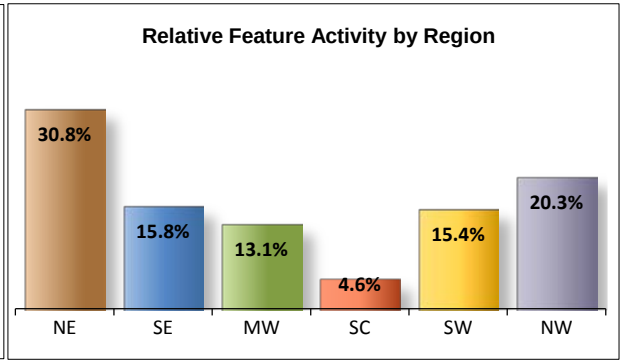
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail activity is slow to recover from the holidays. For whole body turkeys, only frozen toms are offered, and those are limited to the Southeast and Midwest regions. Offers are light on fresh bone-in breasts, increase on frozen bone-in breasts; prices are lower on both. Rotisserie breasts are back but they will cost more. White parts are gaining space in the circulars; cutlets, tenders and marinated tenders are all more active this week. Prices trend lower on cutlets, higher on tenders and marinated tenders. Dark parts activity decreases, especially on smoked parts; prices trend lower everything except necks. Fewer retailers feature ground turkey; offers are sharply lower compared to a year ago. Offers retreat on patties, 93% lean, and ground breast, increase on sausage and 85% lean. Even at lower levels, the 93% lean continues to be the most popular grind. Deli is picking up. Service deli Category 1 is more active; processor brand chicken is getting a lot of attention this week. Category 2 is about unchanged in volume, Category 3 drops. Self-service deli is more active.







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/]	**55.7% of 4,400 sampled outlets**			**45.2% of 6,000 sampled outlets**			**34.8% of 4,000 sampled outlets**		
Special Rate [4/]	**6.8% of stores w/ no-price promotions**			**0.7% of stores w/ no-price promotions**			**1.9% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 4,340**			**Activity Index = 3,230**			**Activity Index = 1,640**		
	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				1.79 - 1.99	400	1.82	0.67 - 1.99	420	1.14
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.79	10	2.79				1.99 - 2.49	10	2.17
Frozen	1.57 - 1.99	140	1.94	1.38 - 1.97	210	1.91	1.59 - 1.79	260	1.73
Split, bone-in									
Fresh	2.29 - 2.79	20	2.64						
Rotisserie	5.99 - 9.99	480	8.29	8.99	20	8.99	8.99	180	8.99
Boneless, whole	5.99	10	5.99						
Cutlets	3.99 - 6.29	1,250	4.72	3.99	70	3.99	5.64	10	5.64
Cutlets, thin sliced									
Strips									
Tenders	4.49 - 4.99	350	4.65				5.64	10	5.64
Marinated Tenders	4.26	110	4.26	4.26	1,140	4.26	4.26	10	4.26
Drumsticks	1.39 - 1.59	140	1.40	1.69	50	1.69	1.39 - 1.59	20	1.48
Thighs	1.59	10	1.59						
Wings	1.39 - 1.59	140	1.40	1.69 - 1.89	80	1.76	1.39 - 1.59	20	1.48
Necks				1.69	50	1.69			
Smoked Drumsticks				1.79 - 2.30	40	2.03	1.99	10	1.99
Smoked Wings				1.79 - 2.30	40	2.03	1.99	10	1.99
Smoked Necks	2.19	10	2.19	1.79 - 2.30	40	2.03	1.59	10	1.59
GROUND TURKEY:									
Patties							2.99	10	2.99
Sausage	2.99 - 3.99	810	3.21	3.99	380	3.99	2.86 - 2.99	40	2.94
85% lean	2.38 - 2.49	260	2.48	2.00 - 2.48	130	2.14	2.39	10	2.39
93% lean	2.80 - 4.00	470	3.26	2.80	370	2.80	2.79 - 3.67	480	2.83
Breast (99-100% lean)	4.79	130	4.79	3.08	210	3.08	4.40 - 4.79	40	4.48
Rolls (frsh/frz 1 lb.)							1.50 - 2.00	90	1.66
Specialty [5/]									
Patties	4.99	10	4.99						
93-94% lean	3.49 - 4.83	270	4.07				4.83	120	4.83
Breast							5.99	20	5.99

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)		
Feature Rate [1/]	**20.7% of 4,000 sampled outlets**			**53.4% of 2,900 sampled outlets**			**67.8% of 1,200 sampled outlets**		
Special Rate [4/]	**9.0% of stores w/ no-price promotions**			**19.0% of stores w/ no-price promotions**			**26.7% of stores w/ no-price promotions**		
Activity Index [2/]	**Activity Index = 610**			**Activity Index = 1,520**			**Activity Index = 830**		
	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	1.38	10	1.38	1.99	240	1.99	1.79 - 1.99	110	1.86
Split, bone-in									
Fresh									
Rotisserie	8.99	90	8.99						
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	3.99	50	3.99	3.99 - 4.79	80	4.22	3.99 - 4.79	290	4.76
Marinated Tenders							2.59 - 4.33	50	3.82
Drumsticks				1.49	120	1.49			
Thighs				1.49	120	1.49			
Wings				1.49	120	1.49			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties									
Sausage				3.27	140	3.27	2.79	30	2.79
85% lean	2.16	40	2.16						
93% lean	2.80 - 3.19	370	2.81	2.80 - 3.99	450	3.01	2.80 - 3.59	230	2.97
Breast (99-100% lean)	3.99	50	3.99	3.19 - 4.99	250	4.48	3.19 - 5.19	120	4.38
Rolls (frsh/frz 1 lb.)									
Specialty [5/]									
Patties									
93-94% lean	3.99	20	3.99						
Breast									

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 13, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/13 thru 01/19.

(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/	77.5% of 22,500 stores		68.0% of 22,500 stores		76.9% of 19,500 stores		87.8% of 4,400 sampled outlets			78.8% of 6,000 sampled outlets		
Activity Index 2/	54,830		43,200		52,790		Activity Index = 14,680			Activity Index = 8,970		
	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	6,310	7.98	6,170	8.04	5,190	7.45	5.99 - 9.99	2,060	8.18	6.98 - 9.99	750	7.39
Private Brand	3,750	7.15	2,320	7.15	2,730	7.18	6.49 - 8.99	2,430	7.16	6.99 - 7.99	260	7.24
Category 2												
Processor Brand	5,620	5.76	5,030	6.06	4,220	5.95	4.98 - 6.99	2,010	5.67	4.99 - 6.99	280	5.64
Private Brand	4,080	6.35	4,220	6.55	4,960	6.27	5.99 - 6.99	340	6.23	6.99	190	6.99
Category 3												
Processor Brand	1,250	3.94	1,510	3.86	1,370	4.09	3.99 - 4.99	120	4.43	2.99 - 3.99	370	3.94
Private Brand	160	4.97	580	5.02	10	3.98	4.98	40	4.98	4.99	20	4.99
Turkey Ham												
Processor Brand	350	3.24	410	3.54	290	2.94	2.98 - 4.79	180	3.71	1.99	10	1.99
Private Brand			40	2.98	20	3.79						
Turkey Pastrami												
Processor Brand	540	4.20	280	4.38	680	4.00	2.99 - 4.99	270	4.06			
Private Brand			30	5.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5,760	7.78	1,820	7.23	4,050	7.38	5.99 - 8.99	1,870	7.93	5.99 - 8.99	1,380	8.03
Private Brand	1,480	7.00	830	7.02	2,030	6.68	6.99	940	6.99			
Category 2												
Processor Brand	120	5.73	640	6.28	180	5.49	5.99	10	5.99	5.99 - 6.99	50	6.13
Private Brand	730	6.55			730	6.05						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,290	3.17	7,120	3.06	11,910	2.98	2.49 - 3.99	1,800	3.28	2.29 - 3.99	1,740	3.26
Private Brand	3,940	2.67	2,590	2.99	1,750	3.01	2.50 - 3.50	610	2.92	2.50 - 3.50	640	2.68
Turkey 16 oz												
Processor Brand	1,670	4.97	730	4.71	630	4.36	4.99 - 5.49	140	5.11	4.99	1,140	4.99
Private Brand			90	3.99	140	5.99						
Chicken 7-10 oz												
Processor Brand	7,130	3.13	6,200	3.03	10,190	3.01	2.49 - 3.99	1,210	3.20	2.29 - 3.99	1,500	3.25
Private Brand	3,650	2.71	2,590	2.99	1,710	3.02	2.50 - 3.99	650	2.99	2.50 - 3.50	640	2.68

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/	**77.8% of 4,000 sampled outlets**			**69.3% of 4,000 sampled outlets**			**65.3% of 2,900 sampled outlets**			**88.1% of 1,200 sampled outlets**		
Activity Index 2/	**Activity Index = 9,260**			**Activity Index = 6,760**			**Activity Index = 4,000**			**Activity Index = 1,900**		
	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	560	7.67	6.98 - 9.99	670	8.29	7.49 - 10.49	1,060	7.95	7.98 - 10.99	650	8.04
Private Brand	6.79 - 9.49	420	7.11	6.99	120	6.99	5.99 - 8.49	100	6.96			
Category 2												
Processor Brand	4.49 - 6.99	1,160	6.18	5.49 - 5.99	490	5.77	4.99 - 5.99	190	5.11	4.98 - 6.99	330	5.34
Private Brand	4.88 - 6.99	1,410	5.92	4.99 - 6.99	420	6.57	6.99 - 7.99	290	7.85	6.99	20	6.99
Category 3												
Processor Brand	3.49 - 4.49	150	4.04	2.99 - 3.88	400	3.85	2.99	30	2.99	3.49 - 3.99	30	3.76
Private Brand	4.69 - 4.99	50	4.96									
Turkey Ham												
Processor Brand	2.79 - 3.58	30	3.26	1.69 - 2.49	30	1.99	2.39 - 2.99	70	2.73			
Private Brand												
Turkey Pastrami												
Processor Brand	3.48 - 4.44	40	4.23	3.99 - 9.99	130	4.50				3.98 - 4.29	60	4.21
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.49 - 8.99	930	7.49	5.98 - 8.49	330	7.13	5.99 - 7.49	300	7.22	6.99 - 9.99	20	8.41
Private Brand	6.99	240	6.99	6.99	40	6.99	7.49	20	7.49			
Category 2												
Processor Brand	3.99 - 6.49	30	4.99									
Private Brand	4.99	200	4.99							7.49	330	7.49
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98 - 3.99	1,350	3.21	1.99 - 2.50	1,600	2.98	2.50 - 3.99	280	2.64	2.68 - 3.99	170	3.23
Private Brand	2.50 - 3.49	710	2.69	2.50 - 3.00	440	2.59	2.50 - 2.79	760	2.51	2.50	70	2.50
Turkey 16 oz												
Processor Brand	4.99	10	4.99	4.49 - 4.99	180	4.67	4.99	190	4.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.98 - 3.99	1,260	3.22	1.99 - 2.69	1,470	2.96	2.50 - 3.99	280	2.64	2.68 - 3.99	150	3.22
Private Brand	2.50 - 3.49	710	2.69	2.50 - 3.00	440	2.59	2.50 - 2.79	430	2.52	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)