



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/20 thru 01/26.

Fri. Jan 20, 2012

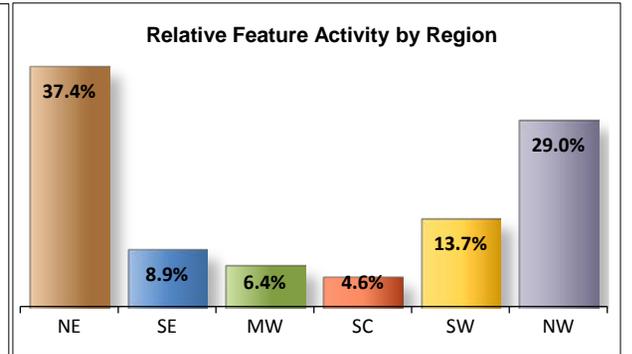
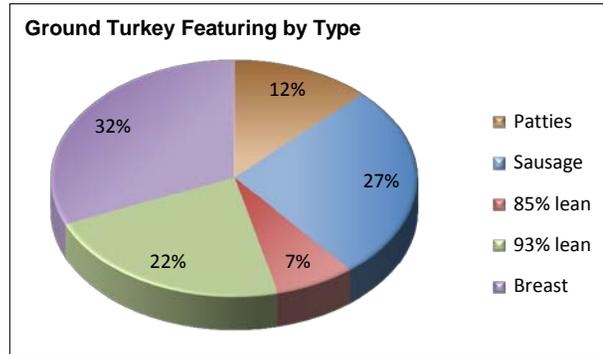
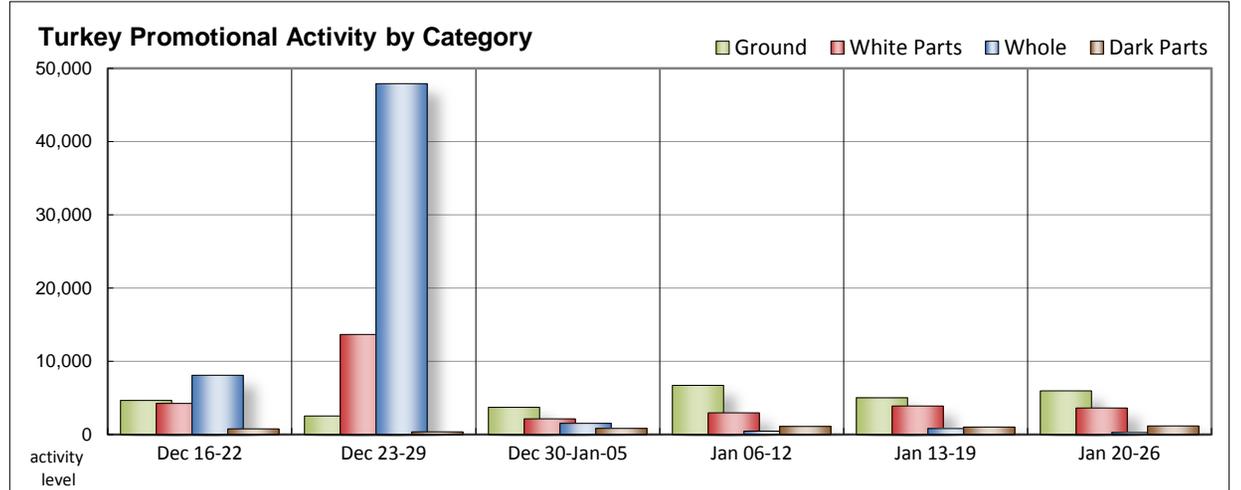
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	32.4% of 22,500 outlets		43.3% of 22,500 outlets		43.6% of 19,500 outlets	
Special Rate ^{4/}	0.2%		7.4%		9.5%	
Activity Index ^{2/}	11,620		12,610		15,260	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	140	1.26			250	0.99
" - Toms	140	1.26	820	1.47	260	1.00
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.64	20	2.48	110	2.07
Frozen	640	1.80	970	1.88	830	1.74
Split, bone-in						
Fresh			20	2.64		
Rotisserie	1,770	7.47	770	8.55	330	7.83
Boneless, whole	20	4.99	10	5.99	200	4.16
Cutlets	750	4.81	1,330	4.69	1,330	4.75
Cutlets, thin sliced					140	5.49
Strips					20	3.99
Tenders	430	4.24	780	4.62	550	4.47
Marinated Tenders	440	4.06	1,310	4.24	1,400	4.08
Drumsticks	160	1.57	330	1.48	120	1.56
Thighs	30	2.29	130	1.50		
Wings	140	1.48	360	1.51	130	1.55
Necks	10	1.69	50	1.69		
Smoked Drumsticks	220	2.22	50	2.02	200	2.59
Smoked Wings	320	2.25	50	2.02	70	2.05
Smoked Necks	300	2.02	60	1.99	140	1.99
GROUND TURKEY:	5,970	3.49	5,020	3.20	8,490	3.03
Patties	740	4.01	10	2.99	550	2.87
Sausage	1,600	2.81	1,400	3.41	1,300	2.85
85% lean	420	2.31	440	2.35	2,020	2.17
93% lean	1,330	3.22	2,370	2.95	2,290	2.68
Breast	1,880	4.48	800	4.12	2,330	4.27
Rolls (frsh/frz 1 lb.)	20	1.53	90	1.66	450	1.51
Specialty ^{5/}						
Patties	10	4.99	10	4.99		
93-94% lean	90	4.22	410	4.29	140	3.49
Breast			20	5.99		

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

This Week's Turkey Feature Highlights

Retailers are not showing much interest in turkey this week. Offers on whole body turkeys decrease, but prices are also lower. Fewer stores promote bone-in breasts; prices are higher on fresh, lower on frozen. This is the week to bring home a rotisserie breast; they are widely offered and prices are more attractive. Boneless white parts are getting less attention. Prices are higher on cutlets, lower on tenders and marinated tenders. Smoked dark parts gain space in circulars, fresh dark parts are less available; most prices trend higher. Promotions on ground turkey increase compared to last week, but are still far behind last year's levels. Offers increase on burgers, sausage and ground breast, drop on 85% and 93% lean. Prices are higher on burgers, 93% lean and ground breast; lower on sausage and 85% lean. Deli activity slows. Promotions decrease on service deli Category 1, increase on Category 2. Prices are mixed. Self-service deli activity is slightly lower. Processer brands increase in volume, drop in price. Private brands have less ad space, prices are higher.



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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Fri. Jan 20, 2012

(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/}	65.5% of 4,400 sampled outlets			29.2% of 6,000 sampled outlets			16.0% of 4,000 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 5,610			Activity Index = 1,850			Activity Index = 850		
	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	1.29	120	1.29				0.99	10	0.99
" - Toms	1.29	120	1.29				0.99	10	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh	3.29	10	3.29				1.99	10	1.99
Frozen	1.57 - 1.99	320	1.94	1.78 - 1.79	220	1.79	0.99 - 1.79	50	1.33
Split, bone-in									
Fresh									
Rotisserie	5.98 - 8.99	970	6.93	6.99 - 8.49	290	7.67	7.99 - 8.99	10	8.35
Boneless, whole									
Cutlets	3.99 - 5.79	670	4.90	3.99	80	3.99			
Cutlets, thin sliced									
Strips									
Tenders	4.99 - 5.99	110	5.09				2.49	10	2.49
Marinated Tenders	3.73 - 4.26	390	4.02						
Drumsticks	1.39 - 1.99	90	1.65	1.49	10	1.49	1.49 - 1.69	20	1.59
Thighs	2.29	30	2.29						
Wings	1.39 - 1.99	60	1.52	1.49	10	1.49	1.29 - 1.69	30	1.51
Necks							1.69	10	1.69
Smoked Drumsticks	2.19	190	2.19				1.89 - 2.99	30	2.38
Smoked Wings	2.19 - 2.49	260	2.27	1.99	30	1.99	1.89 - 2.99	30	2.38
Smoked Necks	1.99	260	1.99	1.99	30	1.99	2.99	10	2.99
GROUND TURKEY:									
Patties	2.99 - 4.49	200	3.12	3.48	10	3.48	2.50 - 4.79	120	4.20
Sausage	2.99 - 3.69	330	3.35	2.50	1,040	2.50	2.05 - 3.50	80	3.01
85% lean	2.30	190	2.30	2.19	70	2.19	2.00 - 2.48	50	2.19
93% lean	2.79 - 3.99	760	3.32	2.79	50	2.79	2.69 - 3.27	50	2.96
Breast (99-100% lean)	4.00 - 4.99	530	4.76	3.98	10	3.98	3.32 - 5.59	300	5.23
Rolls (frsh/frz 1 lb.)							1.50 - 1.59	20	1.53
Specialty ^{5/}									
Patties	4.99	10	4.99						
93-94% lean	3.99 - 4.99	60	4.46				3.59 - 3.99	30	3.74
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)		
Feature Rate ^{1/}	11.2% of 4,000 sampled outlets			30.5% of 2,900 sampled outlets			57.6% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 640			Activity Index = 1,370			Activity Index = 1,200		
	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	1.19	10	1.19						
" - Toms	1.19	10	1.19						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen				1.39	40	1.39	1.68	10	1.68
Split, bone-in									
Fresh									
Rotisserie				7.99	120	7.99	7.99 - 8.99	380	8.52
Boneless, whole	4.99	20	4.99						
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders							3.99	310	3.99
Marinated Tenders							3.33 - 4.66	50	4.40
Drumsticks				1.39	40	1.39			
Thighs									
Wings				1.39	40	1.39			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	4.49	360	4.49	3.50	40	3.50	4.49	10	4.49
Sausage				3.27 - 3.99	140	3.63	3.43	10	3.43
85% lean	2.00 - 2.49	80	2.32	2.79	30	2.79			
93% lean	2.69	30	2.69	2.80 - 3.19	330	2.96	3.19 - 3.99	110	3.69
Breast (99-100% lean)	4.79	130	4.79	3.99 - 4.99	590	4.05	3.99 - 4.79	320	4.01
Rolls (frsh/frz 1 lb.)									
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 20, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/20 thru 01/26.

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

	NATIONAL SUMMARY						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)		
Feature Rate ^{1/}	71.0% of 22,500 stores		77.5% of 22,500 stores		82.4% of 19,500 stores		90.3% of 4,400 sampled outlets			59.0% of 6,000 sampled outlets		
Activity Index ^{2/}	44,840		54,830		54,690		Activity Index = 15,350			Activity Index = 8,520		
	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	4,620	7.71	6,310	7.98	6,030	7.81	6.98 - 8.99	1,930	7.68	6.98 - 8.99	1,560	7.52
Private Brand	1,730	7.57	3,750	7.15	2,080	7.68	6.49 - 9.99	1,050	7.18	6.99 - 8.49	250	7.74
Category 2												
Processor Brand	4,890	6.18	5,620	5.76	6,560	6.09	4.99 - 6.99	1,690	6.59	4.29 - 6.99	1,000	5.83
Private Brand	4,950	7.18	4,080	6.35	4,640	6.44	5.97 - 7.99	2,200	6.95	5.99 - 7.99	300	6.55
Category 3												
Processor Brand	890	3.98	1,250	3.94	1,620	4.34	2.99 - 4.99	190	4.80	3.99	30	3.99
Private Brand	290	4.07	160	4.97	1,370	5.25	2.99 - 4.99	120	3.87	3.99	30	3.99
Turkey Ham												
Processor Brand	300	3.33	350	3.24	540	3.46	2.98 - 3.99	120	3.77	3.49	40	3.49
Private Brand					30	3.64						
Turkey Pastrami												
Processor Brand	270	4.46	540	4.20	150	3.69	3.49 - 4.99	110	4.02	2.99 - 4.99	40	3.97
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,530	7.24	5,760	7.78	3,360	6.67	5.99 - 8.99	1,570	7.49	7.99	190	7.99
Private Brand	1,590	7.38	1,480	7.00	740	6.63	5.99 - 7.99	1,300	7.46	5.99 - 7.49	150	6.65
Category 2												
Processor Brand	170	5.97	120	5.73	560	5.75	4.99	10	4.99	5.99	10	5.99
Private Brand			730	6.55	140	5.99						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,040	3.07	8,290	3.17	10,430	2.98	2.49 - 3.99	1,390	3.13	1.99 - 3.79	2,260	3.11
Private Brand	1,920	2.96	3,940	2.67	2,330	3.14	2.50 - 3.50	910	2.89	2.50 - 3.00	140	2.77
Turkey 16 oz												
Processor Brand	1,100	4.98	1,670	4.97	2,370	5.09	3.99	450	3.99	4.99 - 6.99	230	6.82
Private Brand	30	3.99			900	3.56	3.99	30	3.99			
Chicken 7-10 oz												
Processor Brand	8,720	3.07	7,130	3.13	8,540	2.99	2.49 - 3.99	1,370	3.13	2.50 - 3.79	2,150	3.10
Private Brand	1,800	2.95	3,650	2.71	2,300	3.13	2.50 - 3.50	910	2.89	2.50 - 3.00	140	2.76

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 ^{1/}	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)		
	73.0% of 4,000 sampled outlets			65.5% of 4,000 sampled outlets			70.0% of 2,900 sampled outlets			73.9% of 1,200 sampled outlets		
	Activity Index = 7,910			Activity Index = 5,340			Activity Index = 5,590			Activity Index = 2,130		
Activity Index ^{2/}	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	6.98 - 9.99	470	7.50	7.99 - 9.99	370	8.19	7.99 - 10.49	260	8.42	9.49 - 12.99	30	11.28
Private Brand	6.59 - 8.49	70	7.33	7.49 - 8.97	360	8.64						
Category 2												
Processor Brand	4.58 - 7.99	1,010	6.02	4.98 - 6.49	590	5.55	6.99	170	6.99	4.99 - 6.99	430	6.32
Private Brand	5.99 - 7.99	1,100	6.95	6.99 - 7.99	480	7.74	7.99 - 8.49	550	8.23	7.49 - 7.99	320	7.51
Category 3												
Processor Brand	2.79 - 4.99	590	3.72	2.69 - 5.49	80	3.94						
Private Brand	3.99 - 4.99	80	4.47	3.99	60	3.99						
Turkey Ham												
Processor Brand	3.58 - 3.98	20	3.77	2.28 - 2.49	80	2.43	2.99 - 3.49	40	3.43			
Private Brand												
Turkey Pastrami												
Processor Brand	3.98 - 6.98	30	5.12	4.99	90	4.99						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 7.99	410	6.92	5.98	10	5.98	5.99	330	5.99	6.99 - 9.49	20	7.79
Private Brand	5.99	10	5.99							7.49	130	7.49
Category 2												
Processor Brand	4.98 - 6.49	150	6.03									
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.39 - 3.99	1,710	3.10	1.99 - 2.50	1,450	2.90	2.48 - 4.29	1,630	3.05	2.50 - 4.29	600	3.19
Private Brand	2.99 - 3.48	260	3.25	2.99	180	2.99	2.68 - 2.99	430	2.98			
Turkey 16 oz												
Processor Brand	3.99 - 5.00	150	4.35	4.89 - 5.49	150	4.96	5.99	120	5.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.39 - 3.99	1,650	3.10	1.99 - 2.50	1,320	2.90	2.48 - 4.29	1,630	3.05	2.50 - 4.29	600	3.19
Private Brand	3.19 - 3.48	200	3.29	2.99	120	2.99	2.68 - 2.99	430	2.98			

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)