



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/27 thru 02/02.

Fri. Jan 27, 2012

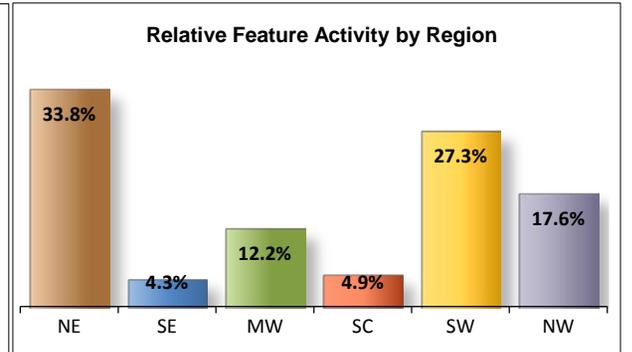
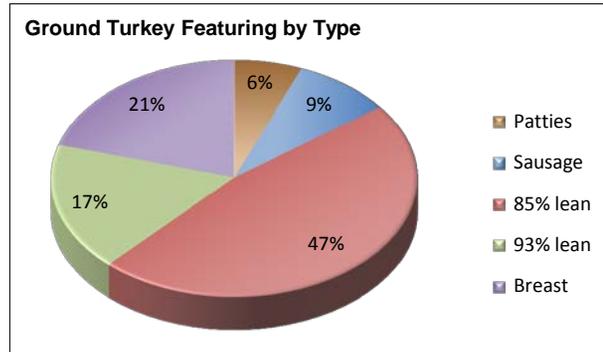
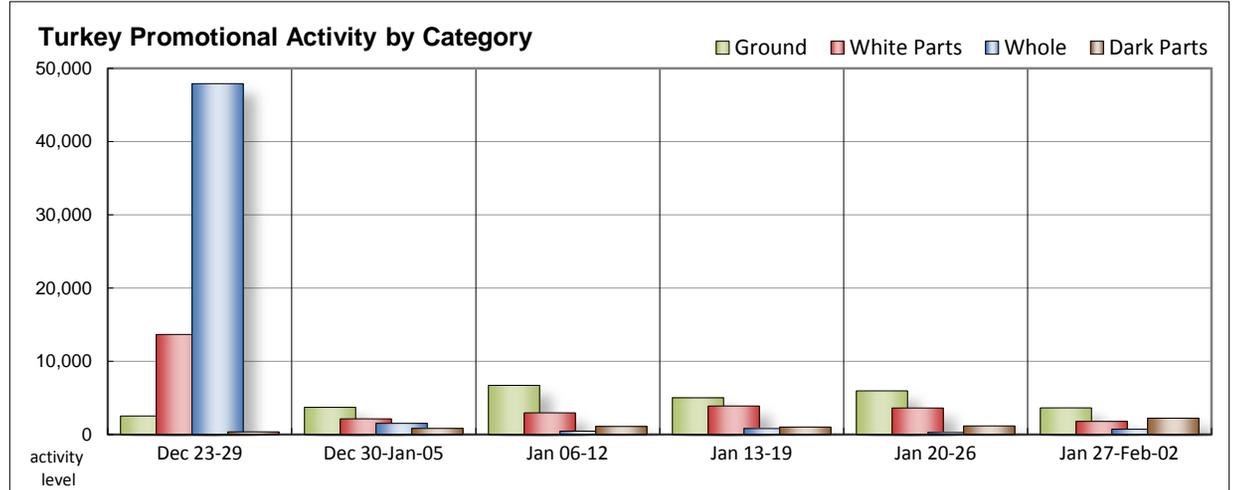
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	25.6% of 22,500 outlets		32.4% of 22,500 outlets		47.5% of 19,500 outlets	
Special Rate ^{4/}	0.3%		0.2%		1.7%	
Activity Index ^{2/}	9,920		11,620		13,490	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	10	1.18				
" - Toms	10	1.18				
Frozen - Hens	360	1.38	140	1.26	270	1.13
" - Toms	350	1.38	140	1.26	130	0.92
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	1.99	20	2.64	120	1.99
Frozen	710	1.95	640	1.80	2,210	1.47
Split, bone-in						
Fresh					30	1.99
Rotisserie	160	7.98	1,770	7.47	1,030	8.17
Boneless, whole	20	4.99	20	4.99	20	4.99
Cutlets	440	4.77	750	4.81	410	4.37
Cutlets, thin sliced	10	5.99			40	4.51
Strips						
Tenders	450	4.89	430	4.24	40	4.18
Marinated Tenders	610	4.05	440	4.06	210	3.66
Drumsticks	280	1.81	160	1.57	40	1.43
Thighs	230	1.89	30	2.29	30	1.78
Wings	330	1.76	140	1.48	50	1.42
Necks	170	1.87	10	1.69	20	1.39
Smoked Drumsticks	610	2.66	220	2.22	180	2.22
Smoked Wings	610	2.66	320	2.25	170	2.19
Smoked Necks	10	1.69	300	2.02	170	1.85
GROUND TURKEY:	3,650	3.36	5,970	3.49	7,470	2.96
Patties	220	3.05	740	4.01	770	2.99
Sausage	320	3.19	1,600	2.81	530	2.87
85% lean	1,720	2.89	420	2.31	1,290	2.27
93% lean	640	3.53	1,330	3.22	3,770	2.77
Breast	750	4.59	1,880	4.48	1,110	4.45
Rolls (frsh/frz 1 lb.)	60	1.86	20	1.53	730	1.38
Specialty ^{5/}						
Patties	60	5.34	10	4.99	10	4.99
93-94% lean	760	3.53	90	4.22	40	4.20
Breast	10	5.69			70	5.42

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

This Week's Turkey Feature Highlights

Retail feature activity on turkey continues to decrease while deli meats are gaining ad space. Frozen whole turkeys are getting more ad space; prices are higher. Offers increase on frozen bone-in breasts but they will cost more. Retailers lose interest in rotisserie breasts; fewer are featured and prices are higher. Offers increase on tenders and marinated tenders, fall on cutlets. Dark parts are more available. Smoked drums and wings are heavily promoted. Prices on dark parts are mostly higher. Ground turkey doesn't seem to be gaining any interest. Retail activity is lower than last week and sharply lower compared to a year ago. The 85% lean is the most popular; it is also the least expensive. Specialty ground turkey is getting more ad space. Deli activity increases on service and self-service deli. Offers increase on Category 1, decrease on Category 2. Self-service deli is heavily promoted, Processor brands and Private brands are both more active. Super Bowl Sunday is right around the corner. Shoppers can buy a store-made party tray or create their own deli platter.



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/}	45.7% of 4,400 sampled outlets			9.8% 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			0.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 3,590			Activity Index = 670			Activity Index = 1,380		
	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							1.18	10	1.18
" - Toms							1.18	10	1.18
Frozen - Hens							0.99 - 1.99	60	1.44
" - Toms							0.99 - 1.99	50	1.43
PARTS:									
Breast:									
Bone-in, whole									
Fresh							1.99	10	1.99
Frozen	1.57 - 1.97	90	1.77	1.18 - 1.97	200	1.93	1.59 - 2.29	350	2.04
Split, bone-in									
Fresh									
Rotisserie	5.99 - 8.99	60	6.30						
Boneless, whole									
Cutlets	4.29 - 5.19	420	4.81				3.98 - 3.99	20	3.98
Cutlets, thin sliced	5.99	10	5.99						
Strips									
Tenders	4.99	100	4.99				5.90	160	5.90
Marinated Tenders	3.73 - 4.79	610	4.05						
Drumsticks	1.89	220	1.89				1.49 - 1.59	20	1.55
Thighs	1.89	220	1.89				1.99	10	1.99
Wings	1.49 - 1.89	270	1.82				1.49 - 1.59	20	1.55
Necks	1.89	160	1.89				1.59	10	1.59
Smoked Drumsticks	1.99 - 2.69	530	2.67	2.69	70	2.69	1.99	10	1.99
Smoked Wings	1.99 - 2.69	530	2.67	2.69	70	2.69	1.99	10	1.99
Smoked Necks							1.69	10	1.69
GROUND TURKEY:									
Patties							2.99 - 3.50	80	3.14
Sausage	2.99 - 3.99	40	3.57				2.79 - 2.87	40	2.84
85% lean	2.40 - 2.99	280	2.65	2.19 - 2.99	110	2.49	2.00 - 2.99	100	2.80
93% lean	3.07 - 3.99	50	3.35	2.98 - 3.99	220	3.94	2.80 - 3.02	30	2.92
Breast (99-100% lean)							3.99 - 5.19	360	4.80
Rolls (frsh/frz 1 lb.)							1.67	10	1.67
Specialty ^{5/}									
Patties	4.99 - 5.49	60	5.34						
93-94% lean	3.49 - 4.99	650	3.50	3.49	70	3.49	3.49 - 4.29	30	4.01
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)		
Feature Rate ^{1/}	13.3% of 4,000 sampled outlets			48.5% of 2,900 sampled outlets			48.5% of 1,200 sampled outlets		
Special Rate ^{4/}	0.7% 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 = 570			Activity Index = 2,290			Activity Index = 590		
	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	0.79	20	0.79	1.39 - 1.69	280	1.41			
" - Toms	0.79	20	0.79	1.39 - 1.69	280	1.41			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.79	70	1.79						
Split, bone-in									
Fresh									
Rotisserie	8.99	50	8.99	8.99	50	8.99			
Boneless, whole									
	4.99	20	4.99						
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				3.99	190	3.99			
Marinated Tenders									
Drumsticks									
Thighs				1.49	40	1.49			
Wings				1.49	40	1.49			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.99	10	2.99	3.00	130	3.00			
Sausage				3.19	240	3.19			
85% lean	2.99	360	2.99	2.99	550	2.99	2.99	320	2.99
93% lean				3.19 - 3.99	300	3.30	3.59	40	3.59
Breast (99-100% lean)				3.99	190	3.99	4.79	200	4.79
Rolls (frsh/frz 1 lb.)	1.49 - 1.89	20	1.73				2.00	30	2.00
Specialty ^{5/}									
Patties									
93-94% lean							3.89	10	3.89
Breast							5.69	10	5.69



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 27, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/27 thru 02/02.

(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		93.3% of 4,400 sampled outlets			81.1% of 6,000 sampled outlets		
Feature Rate ^{1/}	77.1% of 22,500 stores		71.0% of 22,500 stores		76.6% of 19,500 stores		Activity Index = 14,200			Activity Index = 14,760		
Activity Index ^{2/}	50,700		44,840		50,590		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						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	3,870	7.63	4,620	7.71	5,250	7.55	6.49 - 8.99	2,390	7.91	6.99 - 8.99	480	7.83
Private Brand	3,430	7.67	1,730	7.57	1,240	6.90	6.99 - 7.99	2,420	7.93	6.99	630	6.99
Category 2												
Processor Brand	3,460	6.15	4,890	6.18	5,690	5.83	4.98 - 7.99	660	6.15	4.99 - 7.49	680	6.21
Private Brand	2,390	6.38	4,950	7.18	3,780	5.98	5.99 - 6.99	770	6.25	6.99	290	6.99
Category 3												
Processor Brand	670	3.94	890	3.98	2,790	4.16	2.97 - 4.99	120	4.04	3.99	130	3.99
Private Brand	1,690	4.99	290	4.07	530	4.86	4.99 - 5.48	310	5.12	4.99	40	4.99
Turkey Ham												
Processor Brand	350	3.63	300	3.33	110	3.22	2.98 - 3.99	210	3.91			
Private Brand												
Turkey Pastrami												
Processor Brand	450	3.75	270	4.46	210	4.21	3.49 - 7.99	230	3.72	3.99	110	3.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,810	7.56	2,530	7.24	4,080	7.50	5.99 - 9.69	840	8.11	6.98 - 10.99	1,350	7.51
Private Brand	1,210	6.75	1,590	7.38	450	7.02	6.99	730	6.99	6.99	210	6.99
Category 2												
Processor Brand	2,780	5.17	170	5.97	90	5.06	4.99	220	4.99	4.99 - 7.49	2,280	5.00
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,520	3.08	9,040	3.07	11,830	3.07	2.50 - 3.99	2,160	3.39	2.19 - 3.99	2,840	3.06
Private Brand	3,570	2.88	1,920	2.96	1,570	3.00	2.69 - 3.33	660	3.02	2.69 - 3.00	1,420	2.75
Turkey 16 oz												
Processor Brand	610	5.08	1,100	4.98	710	4.70	3.99	50	3.99	4.99	110	4.99
Private Brand			30	3.99	410	3.65						
Chicken 7-10 oz												
Processor Brand	9,460	3.08	8,720	3.07	10,280	3.12	2.50 - 3.99	1,770	3.40	2.50 - 3.99	2,770	3.07
Private Brand	3,430	2.86	1,800	2.95	1,570	3.00	2.69 - 3.33	660	3.02	2.69 - 3.00	1,420	2.75

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)		
	81.0% of 4,000 sampled outlets			64.3% of 4,000 sampled outlets			59.2% of 2,900 sampled outlets			70.8% of 1,200 sampled outlets		
	Activity Index = 9,450			Activity Index = 6,850			Activity Index = 3,980			Activity Index = 1,460		
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	370	7.74	5.19 - 9.49	570	6.26				6.99 - 9.49	60	7.28
Private Brand	6.49 - 9.49	200	7.19	6.77 - 8.49	180	7.00						
Category 2												
Processor Brand	4.49 - 6.99	1,090	6.18	4.29 - 5.99	700	6.12	5.99 - 6.49	250	6.05	4.99 - 6.99	80	5.95
Private Brand	5.49 - 6.99	740	5.86	5.99 - 6.99	140	6.26	7.99	250	7.99	5.99	200	5.99
Category 3												
Processor Brand	2.99 - 3.99	120	3.82	3.49 - 4.49	170	3.99	2.99 - 3.99	110	3.84	3.98	20	3.98
Private Brand	3.99 - 5.49	180	4.77	4.99	360	4.99	4.99	790	4.99	4.99	10	4.99
Turkey Ham												
Processor Brand	2.99 - 3.49	60	3.17	3.49	10	3.49	2.59 - 3.59	70	3.22			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 4.49	100	3.53	3.99	10	3.99						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.58 - 8.49	300	6.75	5.99 - 7.99	250	6.66	7.99	20	7.99	7.99 - 10.99	50	8.70
Private Brand	5.49	200	5.49	6.99 - 7.49	70	7.15						
Category 2												
Processor Brand	4.99 - 6.99	240	6.69	6.99	40	6.99						
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	2,710	3.05	1.69 - 2.69	1,860	2.85	2.79 - 3.49	750	3.04	2.49 - 3.00	200	2.85
Private Brand	2.50 - 3.00	140	2.95	2.50 - 2.99	480	2.87	2.99	550	2.99	2.99	320	2.99
Turkey 16 oz												
Processor Brand	4.98 - 5.28	250	5.01	4.77 - 5.28	60	5.02	4.99 - 5.99	130	5.92	2.99	10	2.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	2,510	3.05	1.69 - 2.69	1,470	2.83	2.79 - 3.49	750	3.04	2.50 - 3.00	190	2.87
Private Brand	2.50 - 3.00	240	2.77	2.50 - 2.99	480	2.87	2.99	310	2.99	2.99	320	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)