



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/03 thru 02/09.**

Fri. Feb 03, 2012

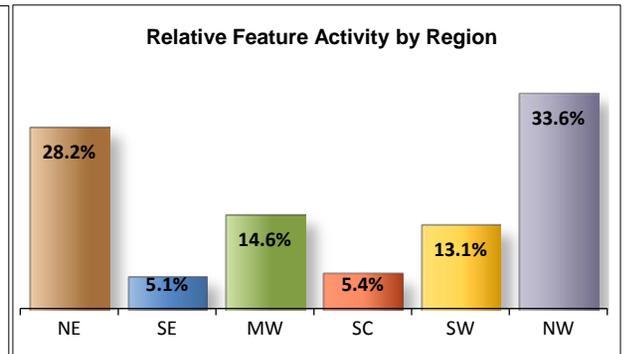
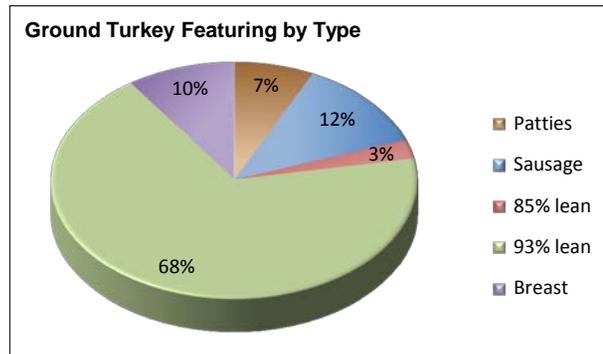
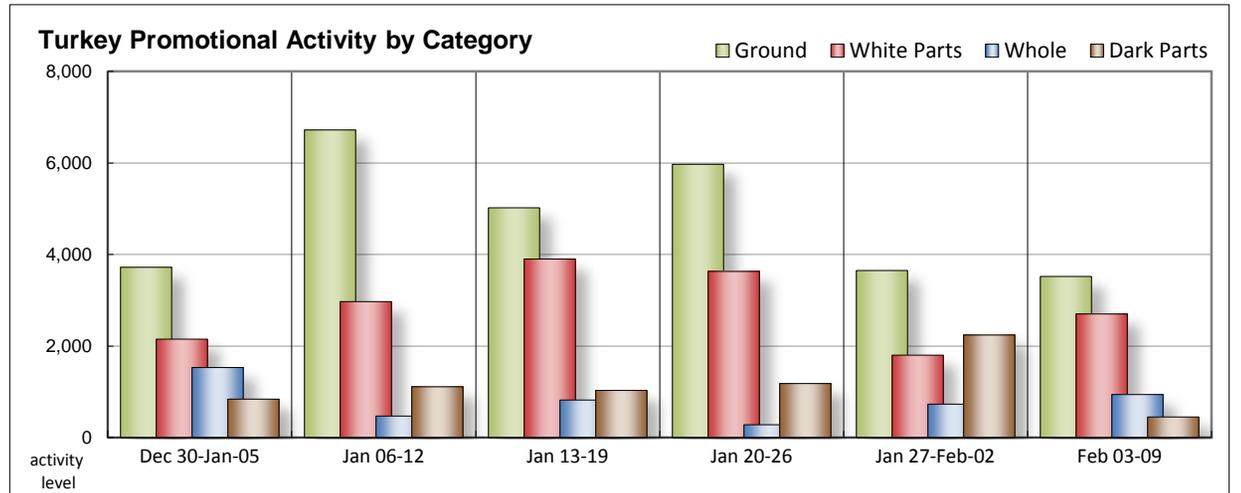
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>29.9% of 22,500 outlets</b>		<b>25.6% of 22,500 outlets</b>		<b>46.6% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>1.3%</b>		<b>0.3%</b>		<b>3.5%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>9,250</b>		<b>9,920</b>		<b>15,560</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	10	1.18	10	1.18	10	1.29
" - Toms	10	1.18	10	1.18		
Frozen - Hens	410	1.34	360	1.38	780	0.85
" - Toms	510	1.37	350	1.38	790	0.85
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	30	2.42	10	1.99	200	2.04
Frozen	890	1.93	710	1.95	150	1.76
Split, bone-in						
Fresh	160	2.69			10	1.99
Rotisserie	480	7.83	160	7.98	610	6.97
Boneless, whole						
Cutlets	940	4.34	440	4.77	510	4.37
Cutlets, thin sliced						
Strips						
Tenders	200	4.54	450	4.89	540	3.81
Marinated Tenders	230	4.50	610	4.05	750	3.80
Drumsticks	120	1.60	280	1.81	260	1.72
Thighs						
			230	1.89	40	2.16
Wings	80	1.54	330	1.76	50	1.89
Necks	10	1.59	170	1.87	10	1.49
Smoked Drumsticks	90	2.16	610	2.66	30	2.22
Smoked Wings	90	2.16	610	2.66	10	1.99
Smoked Necks	60	1.89	10	1.69		
<b>GROUND TURKEY:</b>	<b>3,520</b>	<b>3.57</b>	<b>3,650</b>	<b>3.36</b>	<b>9,590</b>	<b>2.88</b>
Patties	250	4.16	220	3.05	800	2.70
Sausage	440	3.54	320	3.19	2,030	2.82
85% lean	90	2.24	1,720	2.89	2,370	2.28
93% lean	2,400	3.19	640	3.53	2,680	2.65
Breast	340	5.39	750	4.59	1,710	4.24
Rolls (frsh/frz 1 lb.)	1,050	1.02	60	1.86	640	1.64
<b>Specialty</b> <sup>5/</sup>						
Patties			60	5.34		
93-94% lean	340	3.73	760	3.53	140	3.49
Breast	20	5.49	10	5.69		

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

**This Week's Turkey Feature Highlights**

Retail activity on turkey is in the doldrums and unable to compete with all the Super Bowl promotions. Offers on frozen hens and toms increase in volume and price. Frozen breasts are more available; prices are slightly lower. Rotisserie picks up and will cost a little less this week. Promotions slow on boneless white parts. Cutlets are widely featured; tenders and marinated tenders take a back seat. Prices are lower on cutlets and tenders, higher on marinated tenders. Offers on dark parts fall from last week's strong showing; prices are lower on everything except smoked necks. Ground turkey can't seem to find its place in the ads. Activity is lower compared to last week and only a fraction of the volume offered a year ago. Promotions on 93% lean far outpace the other grinds; 85% lean almost disappears from the circulars. Deli activity slows as ad space is dedicated to more traditional party items for the Super Bowl weekend. Service deli offers increase on Category 1 Processor brand with at prices and Category 2 Processor brand at lower prices. Offers are lighter on all self-service deli items.



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>	55.4% of 4,400 sampled outlets			12.1% of 6,000 sampled outlets			27.1% of 4,000 sampled outlets		
Special Rate <sup>4/</sup>	1.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			4.9% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 3,380			Activity Index = 860			Activity Index = 1,700		
	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							1.18	10	1.18
" - Toms							1.18	10	1.18
Frozen - Hens	1.39	160	1.39				0.99 - 1.49	190	1.28
" - Toms	1.39	160	1.39				0.99 - 1.49	290	1.36
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	3.29	10	3.29				1.99	10	1.99
Frozen	1.57 - 1.99	340	1.83	1.97	190	1.97	1.49	10	1.49
Split, bone-in									
Fresh	2.69	160	2.69						
Rotisserie	5.99 - 9.99	480	7.83						
Boneless, whole									
Cutlets	3.99 - 4.99	850	4.36	3.99	70	3.99	3.99	10	3.99
Cutlets, thin sliced									
Strips									
Tenders	4.49	190	4.49						
Marinated Tenders	4.26	90	4.26						
Drumsticks	1.79	10	1.79				1.49 - 1.59	110	1.58
Thighs									
Wings	1.49 - 1.79	60	1.55				1.49 - 1.59	20	1.53
Necks							1.59	10	1.59
Smoked Drumsticks	1.99	20	1.99	1.79 - 2.49	60	2.25	1.99	10	1.99
Smoked Wings	1.99	20	1.99	1.79 - 2.49	60	2.25	1.99	10	1.99
Smoked Necks				1.79 - 2.30	60	1.89			
<b>GROUND TURKEY:</b>									
Patties	2.99 - 3.69	20	3.31				2.99 - 4.49	210	4.36
Sausage	3.68	130	3.68	3.98	10	3.98	2.80 - 3.49	100	3.02
85% lean	2.38 - 2.50	20	2.42	2.19	70	2.19			
93% lean	3.03 - 4.29	230	3.52				2.39 - 3.59	300	3.36
Breast (99-100% lean)	4.79 - 6.53	310	5.46						
Rolls (frsh/frz 1 lb.)	1.00	120	1.00	1.00	340	1.00	1.00 - 1.67	400	1.06
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean	3.49 - 4.49	290	3.77	3.49	40	3.49	3.49	10	3.49
Breast							5.49	20	5.49



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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>	15.9% of 4,000 sampled outlets			38.3% of 2,900 sampled outlets			59.6% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	0.9% 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 = 640			Activity Index = 1,120			Activity Index = 1,190		
	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	1.28	40	1.28	1.69	20	1.69			
" - Toms	1.28	40	1.28	1.69	20	1.69			
<b>PARTS:</b>									
<b>Breast:</b>									
<b>Bone-in, whole</b>									
Fresh							1.99	10	1.99
Frozen	1.49 - 1.69	120	1.61				1.78 - 2.29	230	2.23
<b>Split, bone-in</b>									
<b>Fresh</b>									
<b>Rotisserie</b>									
<b>Boneless, whole</b>									
<b>Cutlets</b>									
							5.45	10	5.45
<b>Cutlets, thin sliced</b>									
<b>Strips</b>									
<b>Tenders</b>									
							5.45	10	5.45
<b>Marinated Tenders</b>									
				4.99	120	4.99	2.65	20	2.65
<b>Drumsticks</b>									
<b>Thighs</b>									
<b>Wings</b>									
<b>Necks</b>									
<b>Smoked Drumsticks</b>									
<b>Smoked Wings</b>									
<b>Smoked Necks</b>									
<b>GROUND TURKEY:</b>									
Patties	3.00	20	3.00				3.68	200	3.68
<b>Sausage</b>									
<b>85% lean</b>									
93% lean	3.19	250	3.19	2.80 - 3.50	930	3.09	2.39 - 3.59	690	3.16
<b>Breast (99-100% lean)</b>									
				4.61	30	4.61			
<b>Rolls (frsh/frz 1 lb.)</b>									
	1.00	170	1.00				1.00	20	1.00
<b>Specialty</b> <sup>5/</sup>									
<b>Patties</b>									
<b>93-94% lean</b>									
<b>Breast</b>									



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

Fri. Feb 03, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/03 thru 02/09.

(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		80.9% of 4,400 sampled outlets			58.9% of 6,000 sampled outlets		
Feature Rate <sup>1/</sup>	65.4% of 22,500 stores		77.1% of 22,500 stores		81.9% of 19,500 stores		<b>Activity Index = 16,430</b>			<b>Activity Index = 7,060</b>		
Activity Index <sup>2/</sup>	<b>43,260</b>		<b>50,700</b>		<b>60,080</b>		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	7,280	7.93	3,870	7.63	7,500	7.84	6.79 - 9.99	3,730	7.97	6.99 - 8.99	2,080	8.27
Private Brand	1,970	7.34	3,430	7.67	1,140	7.17	6.99 - 8.99	1,450	7.04	6.99	40	6.99
<b>Category 2</b>												
Processor Brand	4,940	5.67	3,460	6.15	4,540	5.83	4.98 - 7.99	1,460	5.95	4.49 - 5.99	490	4.75
Private Brand	4,310	7.27	2,390	6.38	5,940	6.24	5.99 - 7.99	990	6.29	6.99 - 7.99	300	7.38
<b>Category 3</b>												
Processor Brand	870	4.48	670	3.94	1,620	3.88	3.99 - 4.98	70	4.15	3.99	120	3.99
Private Brand	120	4.78	1,690	4.99	2,630	4.78	4.98	40	4.98	3.99 - 4.99	70	4.66
<b>Turkey Ham</b>												
Processor Brand	610	3.55	350	3.63	330	2.73	2.98 - 6.99	420	3.91	3.99	20	3.99
Private Brand	40	3.98			40	2.98	3.98	40	3.98			
<b>Turkey Pastrami</b>												
Processor Brand	500	4.07	450	3.75	160	4.41	3.49 - 3.99	410	3.96	3.99	20	3.99
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4,170	7.01	2,810	7.56	2,530	8.03	5.99 - 8.99	2,570	7.11	6.99 - 8.99	730	7.36
Private Brand	300	7.47	1,210	6.75	20	6.99	7.69	110	7.69	7.69	70	7.69
<b>Category 2</b>												
Processor Brand	220	6.94	2,780	5.17	1,000	6.50						
Private Brand					320	5.68						
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	8,380	3.10	10,520	3.08	12,410	2.97	2.49 - 3.99	2,230	3.23	2.50 - 3.50	1,450	3.07
Private Brand	990	3.15	3,570	2.88	3,850	3.00	2.48 - 3.50	410	3.03	2.50 - 3.33	210	2.91
<b>Turkey 16 oz</b>												
Processor Brand	110	5.08	610	5.08	2,520	4.78				4.99 - 5.99	60	5.16
Private Brand					1,340	5.00						
<b>Chicken 7-10 oz</b>												
Processor Brand	7,460	3.10	9,460	3.08	11,430	2.97	2.49 - 3.99	2,090	3.23	2.75 - 3.50	1,190	3.10
Private Brand	990	3.15	3,430	2.86	760	3.00	2.48 - 3.50	410	3.03	2.50 - 3.33	210	2.91

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)		
	69.8% of 4,000 sampled outlets			58.0% of 4,000 sampled outlets			55.4% of 2,900 sampled outlets			74.9% of 1,200 sampled outlets		
	Activity Index = 10,120			Activity Index = 4,310			Activity Index = 3,790			Activity Index = 1,550		
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	5.98 - 9.99	1,070	7.10	6.99 - 9.99	220	8.11	7.99 - 8.49	20	8.35	7.49 - 12.99	160	7.93
Private Brand	6.49 - 8.99	60	7.36				7.49 - 8.49	420	8.41			
<b>Category 2</b>												
Processor Brand	4.49 - 6.99	2,010	5.68	4.99 - 6.99	670	5.50	4.99 - 6.99	240	5.97	4.99 - 6.99	70	6.45
Private Brand	5.98 - 7.99	820	6.75	6.99 - 8.49	950	7.78	6.99 - 8.99	840	8.12	6.99 - 8.99	410	7.73
<b>Category 3</b>												
Processor Brand	3.69 - 4.49	40	4.14	2.79 - 4.99	130	4.62	2.98 - 3.69	70	3.34	3.98 - 4.99	440	4.83
Private Brand					10	4.79						
<b>Turkey Ham</b>												
Processor Brand	2.69 - 3.58	30	3.23	2.19	10	2.19	2.49 - 2.79	130	2.50			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.48 - 3.58	20	3.53	9.99	10	9.99				3.98	40	3.98
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4.99 - 7.99	730	6.18	6.98 - 8.99	120	7.62	7.49	10	7.49	7.98	10	7.98
Private Brand	5.98 - 7.99	20	7.40	6.99	80	6.99	7.49	20	7.49			
<b>Category 2</b>												
Processor Brand	5.98 - 6.99	180	6.92	6.99	40	6.99						
Private Brand												
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 3.99	2,580	2.99	2.49 - 2.88	1,130	3.05	2.75 - 3.50	780	3.25	2.99 - 3.00	210	2.99
Private Brand	2.99 - 3.33	130	3.31				3.50	240	3.50			
<b>Turkey 16 oz</b>												
Processor Brand					50	4.99						
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.00 - 3.99	2,300	2.97	2.49 - 2.99	890	3.02	2.75 - 3.50	780	3.25	2.99 - 3.00	210	2.99
Private Brand	2.99 - 3.33	130	3.31				3.50	240	3.50			

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