



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/10 thru 02/16.

Fri. Feb 10, 2012

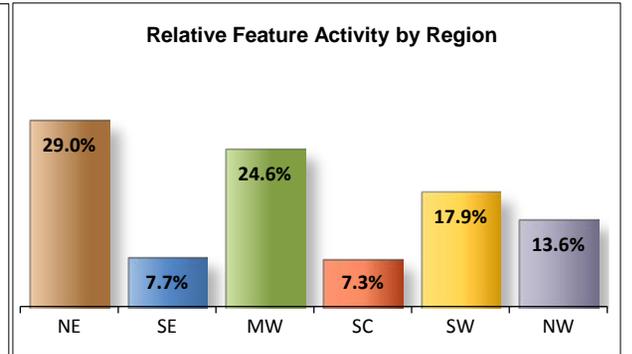
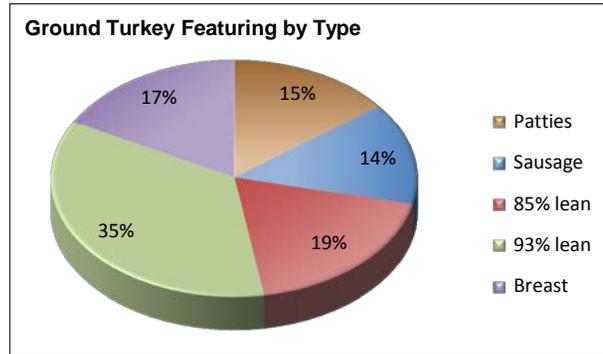
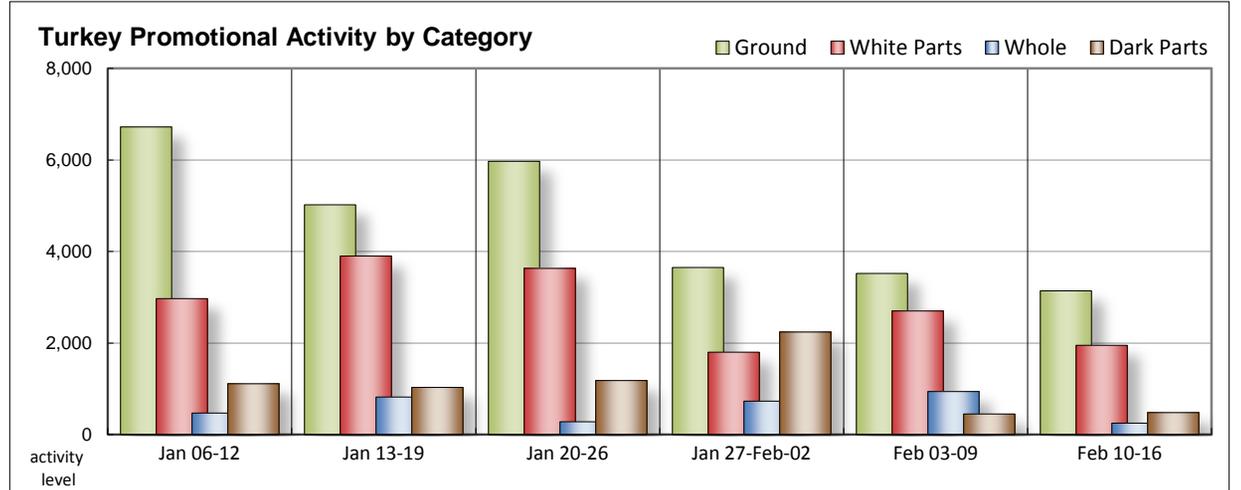
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	31.2% of 22,500 outlets		29.9% of 22,500 outlets		44.4% of 19,500 outlets	
Special Rate ^{4/}	7.4%		1.3%		7.7%	
Activity Index ^{2/}	8,830		9,250		12,420	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			10	1.18	10	1.29
" - Toms			10	1.18	10	1.29
Frozen - Hens	130	1.44	410	1.34	70	0.98
" - Toms	120	1.51	510	1.37	200	0.65
PARTS:						
Breast:						
Bone-in, whole						
Fresh	80	2.43	30	2.42	150	2.07
Frozen	930	1.78	890	1.93	1,040	1.63
Split, bone-in						
Fresh	10	2.29	160	2.69	30	3.28
Rotisserie	320	6.90	480	7.83	950	7.13
Boneless, whole						
Cutlets	290	4.56	940	4.34	610	4.81
Cutlets, thin sliced	100	4.99			240	4.97
Strips						
Tenders	210	4.59	200	4.54	40	4.09
Marinated Tenders	1,120	3.82	230	4.50	940	3.91
Drumsticks						
Thighs	310	1.44	120	1.60	60	1.55
Wings	10	1.59			80	2.14
Necks	90	1.51	80	1.54	270	1.74
Necks			10	1.59	90	1.55
Smoked Drumsticks	30	1.99	90	2.16	20	2.29
Smoked Wings	10	2.38	90	2.16	10	2.30
Smoked Necks	30	1.76	60	1.89	10	2.30
GROUND TURKEY:	3,140	3.44	3,520	3.57	7,000	2.60
Patties	460	3.30	250	4.16	780	2.89
Sausage	440	3.52	440	3.54	1,580	2.85
85% lean	590	2.36	90	2.24	2,360	2.03
93% lean	1,110	3.49	2,400	3.19	2,050	2.67
Breast	540	4.78	340	5.39	230	5.07
Rolls (frsh/frz 1 lb.)	1,220	1.27	1,050	1.02	500	1.88
Specialty ^{5/}						
Patties	130	4.00				
93-94% lean	240	4.66	340	3.73	40	3.50
Breast	300	5.51	20	5.49	10	3.99

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

This Week's Turkey Feature Highlights

Retailers bring out their Valentine Day promotions and turkeys are not feeling the love. Whole body turkeys are lightly featured; prices are higher this week. Offers increase on frozen bone-in breasts; prices trend lower. Rotisserie breasts are less available, but there are some good deals out there. Looking for boneless white parts? Marinated tenders are widely promoted and priced to get the shopper's attention. The other boneless white parts are not getting much space in the circulars. Offers increase on fresh drums; the other dark parts are just sitting on the sidelines, waiting to be noticed. Ground turkey activity has been lagging for months when compared to the previous year. Is this a trend? We'll have to keep watching. For now, fewer stores offer 93% lean but it continues to be the favorite grind. Prices range higher on 85% and 93% lean, lower on the other ground items. More stores are promoting deli items this week, but with fewer selections. Service deli Category 1 and Category 2 Private Brands are more active. Self-service deli activity slows. Prices on self-service deli are mostly lower.



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. Feb 10, 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/}	40.3% of 4,400 sampled outlets			18.5% of 6,000 sampled outlets			33.8% of 4,000 sampled outlets		
Special Rate ^{4/}	3.6% of stores w/ no-price promotions			0.9% of stores w/ no-price promotions			2.1% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,540			Activity Index = 1,090			Activity Index = 2,200		
	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	0.99 - 1.59	110	1.51				1.19	10	1.19
" - Toms	1.59	100	1.59				1.19	10	1.19
PARTS:									
Breast:									
Bone-in, whole									
Fresh							1.99	10	1.99
Frozen	1.38 - 1.99	240	1.83	1.38 - 1.97	240	1.89	1.28 - 1.99	290	1.71
Split, bone-in									
Fresh									
Rotisserie	4.99 - 6.99	120	6.46				7.49	70	7.49
Boneless, whole									
Cutlets	4.99 - 5.29	100	5.01	4.19	20	4.19	3.98 - 4.49	70	4.38
Cutlets, thin sliced									
Strips									
Tenders				4.19	20	4.19	4.99	90	4.99
Marinated Tenders	3.73 - 4.26	850	3.86	3.73	70	3.73	3.73	180	3.73
Drumsticks									
	1.39 - 1.59	140	1.40	1.49	110	1.49	1.49	10	1.49
Thighs									
	1.59	10	1.59						
Wings									
	1.59	10	1.59	1.69	20	1.69	1.49	10	1.49
Necks									
Smoked Drumsticks				1.79	20	1.79	2.38	10	2.38
Smoked Wings							2.38	10	2.38
Smoked Necks				1.79	20	1.79	1.69	10	1.69
GROUND TURKEY:									
Patties	2.50 - 3.49	50	2.72				3.00 - 3.99	290	3.31
Sausage	2.45 - 3.98	50	3.12				2.45 - 3.27	100	3.11
85% lean	2.39 - 2.50	60	2.47	1.83 - 2.49	150	2.11	2.39 - 2.79	260	2.48
93% lean	2.99 - 4.29	120	4.02	3.99	80	3.99	2.79 - 3.99	280	3.14
Breast (99-100% lean)	4.79 - 5.03	340	4.91						
Rolls (frsh/frz 1 lb.)	1.00	120	1.00	1.00	340	1.00	1.00 - 2.99	490	1.43
Specialty ^{5/}									
Patties	4.00	130	4.00						
93-94% lean	4.69	100	4.69				4.29 - 4.69	140	4.64
Breast	5.49 - 5.99	280	5.52	5.49	10	5.49	5.49	10	5.49



USDA Weekly Retail Turkey Feature Activity

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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/}	22.9% of 4,000 sampled outlets			45.0% of 2,900 sampled outlets			46.5% of 1,200 sampled outlets		
Special Rate ^{4/}	9.0% of stores w/ no-price promotions			23.0% of stores w/ no-price promotions			29.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 700			Activity Index = 1,240			Activity Index = 390		
	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	0.99	10	0.99						
" - Toms	0.99	10	0.99						
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.49	70	2.49
Frozen	1.49 - 1.69	100	1.68				0.98 - 1.99	60	1.61
Split, bone-in									
Fresh									
Rotisserie				6.99	130	6.99			
Boneless, whole									
Cutlets	4.19	90	4.19				5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders	4.19	90	4.19				5.45	10	5.45
Marinated Tenders							3.33	20	3.33
Drumsticks									
Thighs	1.19	10	1.19	1.49	40	1.49			
Wings	1.19	10	1.19	1.49	40	1.49			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.00 - 3.50	80	3.27	3.99	40	3.99
Sausage				3.27 - 3.99	250	3.80	3.27	40	3.27
85% lean	1.99 - 2.69	90	2.32	2.40	30	2.40			
93% lean	3.00 - 3.19	70	3.04	2.63 - 3.99	520	3.58	2.80 - 3.19	40	2.85
Breast (99-100% lean)				4.39 - 4.99	130	4.41	4.79	70	4.79
Rolls (frsh/frz 1 lb.)	1.00 - 2.69	220	1.29	1.00	20	1.00	2.78 - 2.99	30	2.84
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Feb 10, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/10 thru 02/16.

(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		88.0% of 4,400 sampled outlets			47.8% of 6,000 sampled outlets		
Feature Rate ^{1/}	70.7% of 22,500 stores		65.4% of 22,500 stores		83.8% of 19,500 stores		Activity Index = 14,350			Activity Index = 5,700		
Activity Index ^{2/}	41,760		43,260		47,370		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
Category 1												
Processor Brand	5,430	7.63	7,280	7.93	5,690	7.47	5.98 - 9.49	2,040	7.69	6.99 - 8.99	530	8.03
Private Brand	2,810	8.05	1,970	7.34	2,330	7.52	6.99 - 8.99	1,900	7.90	6.99 - 7.99	70	7.88
Category 2												
Processor Brand	4,890	5.97	4,940	5.67	5,390	5.94	4.77 - 6.99	1,720	6.01	4.77 - 6.99	600	5.92
Private Brand	3,970	6.96	4,310	7.27	4,550	6.41	5.97 - 7.99	1,870	6.51	6.99 - 7.99	480	7.08
Category 3												
Processor Brand	960	3.99	870	4.48	1,060	3.81	3.98 - 4.99	290	4.39	2.98 - 3.99	190	3.93
Private Brand			120	4.78	70	4.27						
Turkey Ham												
Processor Brand	590	3.38	610	3.55	220	3.38	2.99 - 5.99	360	3.80	5.99	20	5.99
Private Brand			40	3.98								
Turkey Pastrami												
Processor Brand	380	5.21	500	4.07	440	3.75	3.99 - 7.99	190	5.97	5.99	20	5.99
Private Brand					10	5.98						
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,940	7.55	4,170	7.01	3,900	7.44	5.99 - 8.99	1,530	8.09	5.99 - 9.49	250	8.29
Private Brand	1,350	6.91	300	7.47	700	7.80	5.99 - 6.99	320	6.63	6.99	430	6.99
Category 2												
Processor Brand	520	6.35	220	6.94	480	5.93				5.99	210	5.99
Private Brand	190	6.37			70	7.99	5.99 - 6.38	190	6.37			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,270	2.99	8,380	3.10	8,140	3.32	2.49 - 4.99	1,860	3.07	2.49 - 3.79	1,160	3.03
Private Brand	1,600	3.08	990	3.15	3,130	2.88	3.00 - 3.50	360	3.39	2.88 - 3.00	400	2.98
Turkey 16 oz												
Processor Brand	520	6.39	110	5.08	2,160	5.01	6.99	100	6.99	4.50 - 6.49	90	6.19
Private Brand					130	3.50						
Chicken 7-10 oz												
Processor Brand	5,740	3.03	7,460	3.10	6,140	3.28	2.49 - 4.99	1,260	3.21	2.49 - 3.79	850	3.10
Private Brand	1,600	3.08	990	3.15	2,760	2.87	3.00 - 3.50	360	3.39	2.88 - 3.00	400	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)



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Fri. Feb 10, 2012

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)		
	80.9% of 4,000 sampled outlets			74.1% of 4,000 sampled outlets			70.0% of 2,900 sampled outlets			76.6% of 1,200 sampled outlets		
	Activity Index = 10,360			Activity Index = 6,280			Activity Index = 3,220			Activity Index = 1,850		
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	5.98 - 9.99	1,440	7.15	6.49 - 7.99	540	7.94	7.79 - 7.99	440	7.88	7.49 - 10.99	440	7.85
Private Brand	6.98 - 8.99	420	8.77	6.77 - 7.99	170	7.30	8.49	250	8.49			
Category 2												
Processor Brand	4.48 - 6.99	1,120	5.65	4.99 - 6.99	1,040	5.87	6.99	390	6.99	6.99	20	6.99
Private Brand	5.99 - 6.29	40	6.09	5.99 - 7.99	710	7.11	7.99	550	7.99	7.49 - 7.99	320	7.51
Category 3												
Processor Brand	2.99 - 3.99	250	3.58	3.49 - 4.49	210	3.99	2.99	10	2.99	4.99	10	4.99
Private Brand												
Turkey Ham												
Processor Brand					140	2.00	2.79 - 3.59	70	3.24			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 6.98	110	4.24	3.98	40	3.98				4.99	20	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.49 - 8.99	840	6.87	5.99 - 8.49	740	7.20	5.99 - 11.99	490	7.13	6.99 - 10.99	90	7.84
Private Brand	6.99	240	6.99	6.99 - 7.49	300	7.03	6.99	40	6.99	6.99	20	6.99
Category 2												
Processor Brand	3.99 - 6.99	260	6.70	5.99	50	5.99						
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	2,120	2.94	2.00 - 2.59	1,370	2.85	2.49 - 3.99	490	3.18	2.98 - 3.00	270	3.00
Private Brand	2.88 - 3.69	640	2.99							3.00	200	3.00
Turkey 16 oz												
Processor Brand	5.00 - 6.99	330	6.27									
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,910	2.92	2.19 - 2.69	970	2.89	2.49 - 3.99	490	3.18	2.98 - 3.00	260	3.00
Private Brand	2.88 - 3.69	640	2.99							3.00	200	3.00

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