



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/24 thru 03/01.

Fri. Feb 24, 2012

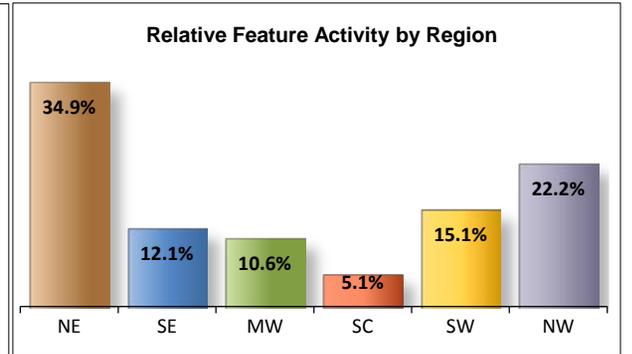
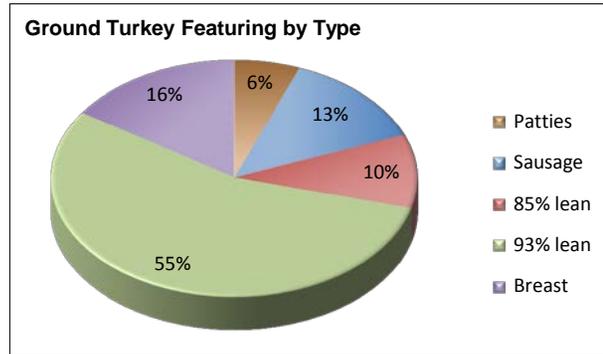
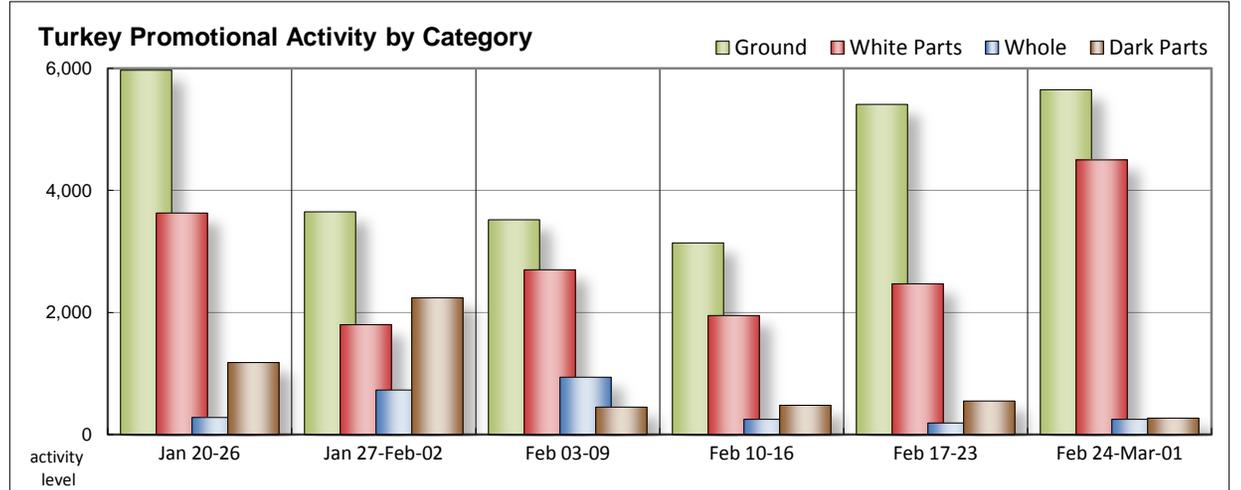
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	39.8% of 22,500 outlets		44.7% of 22,500 outlets		49.8% of 19,500 outlets	
Special Rate ^{4/}	0.0%		1.1%		1.7%	
Activity Index ^{2/}	11,440		12,010		17,190	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	50	1.39	60	0.96	350	1.05
" - Toms	200	1.14	130	0.94	260	0.86
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	2.29	30	2.18	10	1.99
Frozen	2,690	1.79	950	1.81	1,750	1.85
Split, bone-in						
Fresh	100	1.89	160	2.99	180	2.49
Rotisserie	290	6.35	120	8.23	1,150	7.27
Boneless, whole	30	4.09	50	5.39	230	4.61
Cutlets	770	5.32	650	5.20	310	4.73
Cutlets, thin sliced	100	4.99	90	4.99	20	4.99
Strips					130	4.99
Tenders	510	5.18	420	4.65	300	4.60
Marinated Tenders	290	3.83	1,670	5.07	1,010	3.87
Drumsticks	60	1.43	210	1.59	180	1.21
Thighs	20	2.24	10	1.98	10	2.49
Wings	60	1.43	170	1.64	190	1.20
Necks	90	1.25	70	1.65	60	1.05
Smoked Drumsticks	30	2.06	70	2.15	10	2.98
Smoked Wings	10	2.49	20	1.79	10	1.69
Smoked Necks						
GROUND TURKEY:	5,650	3.24	5,410	3.25	10,260	2.89
Patties	330	3.23	50	3.14	1,220	2.99
Sausage	750	3.74	300	3.36	2,700	2.96
85% lean	570	2.35	410	2.17	2,150	2.23
93% lean	3,110	3.02	3,300	3.05	3,060	2.74
Breast	890	4.39	1,350	4.13	1,130	4.24
Rolls (frsh/frz 1 lb.)	280	1.84	1,460	1.21	430	1.10
Specialty ^{5/}						
Patties			10	4.99		
93-94% lean	180	4.27	100	4.73	330	4.62
Breast	20	5.79	150	5.90	10	4.59

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

This Week's Turkey Feature Highlights

Retail activity on turkey slows as stores give more ad space to seafood for Lenten specials. Frozen whole turkeys are lightly featured; prices are higher. The big item this week is frozen bone-in breast; offers are plentiful, especially in the Southeast, and prices trend lower. Rotisserie breasts are more available and are a good value. Boneless white parts are less active. Promotions on marinated tenders drop sharply in volume and price. Prices edge higher on cutlets and tenders. There isn't much interest in dark parts this week. Ground turkey activity continues to grow. Offers increase on patties, sausage and 85% lean, retreat on 93% lean and ground breast. The 93% lean remains the most widely promoted. What happened to deli this week? Fewer stores have deli in their circulars. Offers on service deli Category 1 Processor Brands yield space to Private Brands. For Category 2 it is the opposite. Offers increase on Processor Brands and decrease on Private Brands. Self-service deli volume falls on all 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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	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/}	53.3% of 4,400 sampled outlets			49.5% of 6,000 sampled outlets			23.8% of 4,000 sampled outlets		
Special Rate ^{4/}	0.2% 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 = 4,710			Activity Index = 2,310			Activity Index = 1,330		
	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				1.18	10	1.18	1.29	10	1.29
" - Toms	0.59	50	0.59	1.18	10	1.18	1.29	110	1.29
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.29	10	2.29
Frozen	1.39 - 1.99	410	1.79	1.68 - 1.97	1,700	1.80	1.59 - 1.79	280	1.64
Split, bone-in									
Fresh							1.89	100	1.89
Rotisserie	5.24 - 8.99	190	6.01						
Boneless, whole									
Cutlets	4.99 - 5.99	770	5.32				2.99 - 4.99	30	4.09
Cutlets, thin sliced	4.99	100	4.99						
Strips									
Tenders	5.49 - 5.99	260	5.51				5.99	10	5.99
Marinated Tenders	3.73 - 4.26	240	3.80				3.73 - 3.99	40	3.91
Drumsticks									
Thighs	1.29 - 1.89	30	1.44				1.49 - 1.69	20	1.56
Wings	2.59	10	2.59				1.89	10	1.89
Wings	1.29 - 1.89	30	1.44				1.49 - 1.69	20	1.56
Necks				1.20	80	1.20	1.69	10	1.69
Smoked Drumsticks	1.68	10	1.68				1.99 - 2.49	20	2.25
Smoked Wings							2.49	10	2.49
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 3.99	200	3.08	2.99	10	2.99			
Sausage	3.20 - 3.99	180	3.37	3.99	380	3.99	2.68 - 2.99	60	2.96
85% lean	1.99 - 3.07	380	2.37	2.47 - 2.49	70	2.48	2.00 - 2.49	20	2.16
93% lean	2.79 - 4.29	1,340	2.89	3.00	50	3.00	2.66 - 3.19	230	2.81
Breast (99-100% lean)	4.61 - 5.99	510	4.81				3.99 - 4.79	100	4.09
Rolls (frsh/frz 1 lb.)							0.91 - 2.00	240	1.84
Specialty ^{5/}									
Patties									
93-94% lean	4.00 - 5.00	180	4.27						
Breast							5.79	20	5.79



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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/}	18.3% of 4,000 sampled outlets			40.3% of 2,900 sampled outlets			65.5% 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 = 650			Activity Index = 1,390			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							1.49	30	1.49
" - Toms							1.49	30	1.49
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.68 - 1.69	100	1.69				1.99	200	1.99
Split, bone-in									
Fresh									
Rotisserie	6.99	50	6.99	6.99	50	6.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				4.79	240	4.79			
Marinated Tenders	4.26	10	4.26						
Drumsticks	1.19	10	1.19						
Thighs									
Wings	1.19	10	1.19						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.50	120	3.50			
Sausage				3.27 - 3.99	120	3.89	3.43	10	3.43
85% lean	2.00 - 2.69	60	2.33	1.99	40	1.99			
93% lean	3.19	380	3.19	2.80 - 3.19	790	3.08	3.19 - 3.99	320	3.36
Breast (99-100% lean)				4.79	30	4.79	3.30 - 3.99	250	3.62
Rolls (frsh/frz 1 lb.)	1.50 - 1.59	30	1.52				2.67	10	2.67
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Feb 24, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/24 thru 03/01.

(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		88.5% of 4,400 sampled outlets Activity Index = 14,620			52.3% of 6,000 sampled outlets Activity Index = 5,990		
Feature Rate ^{1/}	61.4% of 22,500 stores		81.1% of 22,500 stores		80.1% of 19,500 stores							
Activity Index ^{2/}	35,570		45,530		48,230							
	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	4,890	8.00	7,330	7.77	3,460	7.63	5.99 - 9.99	2,760	7.93	7.69 - 9.49	840	8.45
Private Brand	1,540	7.32	1,340	7.34	1,720	7.04	5.99 - 7.99	1,250	7.24	6.99 - 7.99	120	7.68
Category 2												
Processor Brand	3,860	6.36	3,330	6.04	5,730	5.94	4.97 - 8.49	1,200	6.87	4.99 - 6.99	250	5.62
Private Brand	3,250	7.07	3,040	5.76	3,790	6.26	5.48 - 7.99	860	6.54	4.99 - 7.99	140	6.55
Category 3												
Processor Brand	840	4.32	1,520	5.43	2,840	4.28	4.98 - 4.99	290	4.99	3.99	350	3.99
Private Brand	1,530	4.84	80	3.99	360	4.72	2.99 - 4.99	180	4.21	3.99 - 4.99	1,260	4.98
Turkey Ham												
Processor Brand	690	3.71	570	3.27	170	3.09	2.99 - 5.99	530	3.95			
Private Brand	40	3.33			20	2.69	3.33	40	3.33			
Turkey Pastrami												
Processor Brand	550	4.16	260	4.06	240	3.85	3.49 - 4.99	390	3.70	5.99	110	5.99
Private Brand	10	3.99										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,060	7.41	3,280	7.42	5,010	7.07	5.99 - 9.49	930	7.54	5.29 - 7.99	190	6.80
Private Brand	1,650	7.40	750	7.27	850	7.01	6.99 - 7.99	1,330	7.30	7.99	10	7.99
Category 2												
Processor Brand	190	5.59	720	6.18	390	6.31				4.98 - 5.99	50	5.25
Private Brand	450	6.32	200	4.99	230	6.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	4,970	3.36	7,000	3.13	9,580	3.00	2.50 - 4.99	1,590	3.55	2.50 - 3.99	910	3.26
Private Brand	2,180	2.94	4,250	2.95	1,100	2.98	2.48 - 3.50	990	2.90	2.50 - 3.00	540	2.93
Turkey 16 oz												
Processor Brand	730	4.26	1,550	5.13	3,590	4.07	3.99 - 6.99	260	4.39	3.99	10	3.99
Private Brand					70	4.39						
Chicken 7-10 oz												
Processor Brand	3,880	3.37	6,060	3.18	7,980	3.01	3.00 - 4.99	880	3.55	2.50 - 3.99	740	3.32
Private Brand	2,260	2.98	4,250	2.95	1,100	2.98	2.48 - 3.50	1,140	2.95	2.88 - 3.00	470	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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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)		
	66.0% of 4,000 sampled outlets			49.7% of 4,000 sampled outlets			50.8% of 2,900 sampled outlets			56.6% of 1,200 sampled outlets		
	Activity Index = 6,270			Activity Index = 3,740			Activity Index = 3,380			Activity Index = 1,570		
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	Price Range (\$/pound)	Summary Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5.99 - 9.99	540 7.75	6.79 - 8.99	630 7.91	8.99	10 8.99	6.99 - 9.49	110 7.93				
Private Brand	6.99 - 8.99	120 7.65	7.49	50 7.49								
Category 2												
Processor Brand	4.98 - 6.99	1,500 6.37	4.99 - 6.98	350 5.29	5.99	330 5.99	5.98 - 6.99	230 6.53				
Private Brand	4.48 - 7.99	360 5.90	4.99 - 7.99	710 6.95	6.99 - 8.99	800 7.85	7.99 - 8.99	380 8.17				
Category 3												
Processor Brand	3.88 - 3.99	70 3.98	2.97 - 3.98	60 3.28	2.99	10 2.99	3.98 - 7.99	60 4.63				
Private Brand	3.99 - 4.49	90 4.16										
Turkey Ham												
Processor Brand	2.99 - 3.58	30 3.16	2.39	20 2.39	2.49 - 3.59	110 2.94						
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 4.29	40 3.66	3.99	10 3.99								
Private Brand	3.99	10 3.99										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 7.99	700 7.06	6.00 - 9.49	200 8.23	8.49	20 8.49	9.49 - 9.99	20 9.77				
Private Brand	6.99 - 7.99	110 7.35	6.99 - 7.99	130 7.52			8.99	70 8.99				
Category 2												
Processor Brand	4.58 - 5.99	140 5.71										
Private Brand	4.99	170 4.99	4.99	40 4.99	7.49	240 7.49						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	810 2.96	2.00 - 2.99	630 3.21	3.50 - 3.99	680 3.59	2.99 - 3.50	350 3.47				
Private Brand	2.78 - 3.50	240 3.18	2.99 - 3.00	160 2.99	2.89	250 2.89						
Turkey 16 oz												
Processor Brand	3.49 - 5.00	350 3.83	3.49 - 5.99	110 5.37								
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	750 2.96	2.00 - 3.00	480 3.33	3.50 - 3.99	680 3.59	2.99 - 3.50	350 3.47				
Private Brand	2.78 - 3.50	240 3.18	2.99 - 3.00	160 2.99	2.89	250 2.89						

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