



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/09 thru 03/15.

Fri. Mar 09, 2012

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

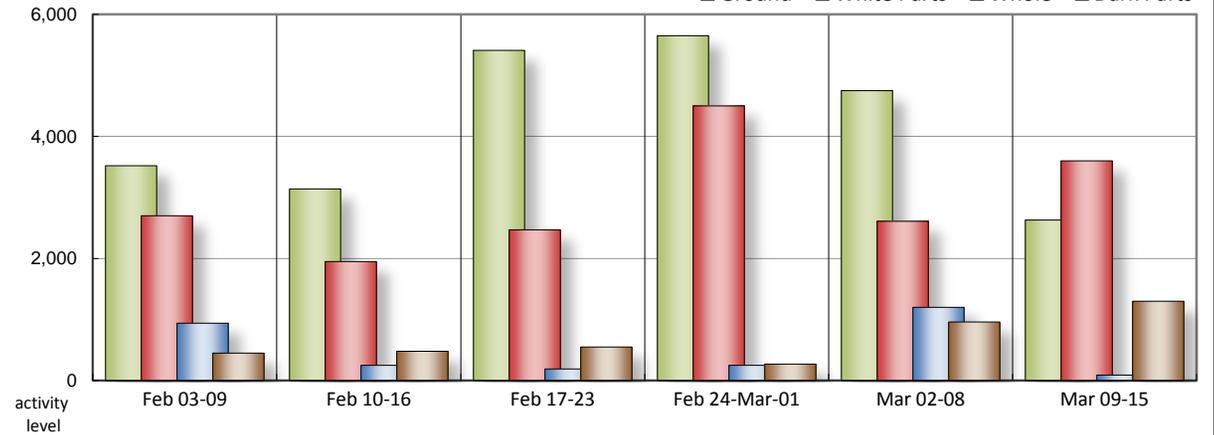
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	21.1% of 22,500 outlets		31.4% of 22,500 outlets		43.4% of 19,500 outlets	
Special Rate ^{4/}	0.3%		3.2%		8.8%	
Activity Index ^{2/}	8,340		10,390		12,320	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					10	1.59
" - Toms					10	1.59
Frozen - Hens	50	0.95	450	1.48	260	1.00
" - Toms	40	1.24	750	1.34	440	1.02
PARTS:						
Breast:						
Bone-in, whole						
Fresh			10	2.99	220	2.62
Frozen	1,320	1.77	890	1.72	1,210	1.45
Split, bone-in						
Fresh	180	2.99			10	2.89
Rotisserie	1,180	7.59	90	6.61	260	7.82
Boneless, whole			60	4.79		
Cutlets	650	5.13	1,380	5.01	600	4.64
Cutlets, thin sliced	100	4.99			240	4.97
Strips			30	4.54		
Tenders	170	4.69	150	4.84	460	4.01
Marinated Tenders	410	4.19	320	3.48	180	3.73
Drumsticks	310	1.83	230	1.88	240	2.06
Thighs	160	1.88	200	2.02	10	1.69
Wings	280	1.90	200	1.87	230	2.17
Necks	190	1.72	10	1.39	200	2.20
Smoked Drumsticks	200	2.07	100	2.16	80	2.08
Smoked Wings	150	2.00	100	2.16	70	2.09
Smoked Necks	10	2.10	120	1.65	40	1.59
GROUND TURKEY:	2,630	3.36	4,750	3.42	6,810	2.99
Patties	320	3.49	310	3.30	680	3.11
Sausage	680	4.01	1,070	3.15	1,600	2.81
85% lean	380	2.25	680	2.45	860	2.26
93% lean	1,070	3.05	1,330	3.34	2,670	2.75
Breast	180	4.75	1,360	4.38	1,000	4.48
Rolls (frsh/frz 1 lb.)	10	2.69	10	1.69	10	1.50
Specialty ^{5/}						
Patties	20	3.99				
93-94% lean			300	4.58	490	3.57
Breast	280	6.57	240	7.40	240	5.42

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

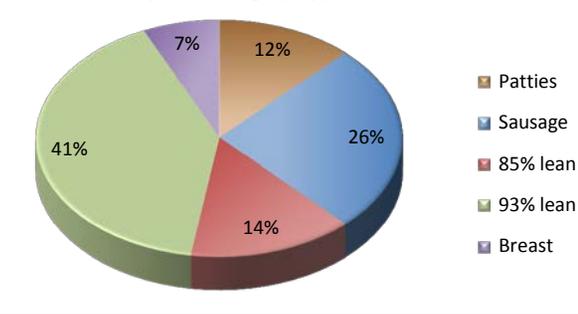
This Week's Turkey Feature Highlights

Between Lenten specials and promotions for St. Patrick's Day retailers don't have much room left for turkey items. Promotions on whole turkeys have almost disappeared; they'll be back soon in time for the next holiday period. There are plenty of ads featuring frozen bone-in breasts; prices trend higher. Rotisserie breasts are more active in this week, a big change from last week's paltry showing. Offers on boneless white parts fall. Fewer stores show cutlets and tenders, more stores promote marinated tenders. This is a good week to find dark parts. They are fully represented; prices are lower on fresh drums and thighs, and on smoked drums and wings. Retailers just can't find much interest in ground turkey. The 93% lean is still the most active and prices are very attractive. Last week was the time to buy ground breast; this week there are fewer ads and prices are higher. Deli activity is lower. Increased offers on Category 2 can't make up for the drop in ads for Category 1 and Category 3 deli items. More stores are featuring self-service deli.

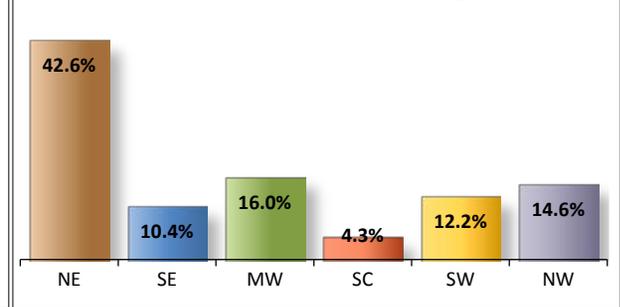
Turkey Promotional Activity by Category



Ground Turkey Featuring by Type



Relative Feature Activity by Region



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/}	44.5% of 4,400 sampled outlets			9.9% of 6,000 sampled outlets			29.4% of 4,000 sampled outlets		
Special Rate ^{4/}	0.5% of stores w/ no-price promotions			0.2% of stores w/ no-price promotions			1.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 3,820			Activity Index = 1,350			Activity Index = 1,350		
	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	30	0.99
" - Toms							1.59	20	1.59
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.29 - 1.99	570	1.94	1.39 - 1.99	280	1.94	1.29 - 1.69	450	1.45
Split, bone-in									
Fresh	2.99	180	2.99						
Rotisserie	5.24 - 8.97	990	7.51	7.99	190	7.99			
Boneless, whole									
Cutlets	4.99 - 5.99	570	5.19	4.99	40	4.99	3.99	20	3.99
Cutlets, thin sliced	4.99	100	4.99						
Strips									
Tenders	4.99	100	4.99				3.99	20	3.99
Marinated Tenders	3.73 - 4.79	310	4.32						
Drumsticks	1.99 - 2.29	130	2.02	1.28 - 1.79	80	1.61	1.19 - 1.49	10	1.32
Thighs							1.79	90	1.79
Wings	1.99 - 2.29	130	2.02	1.49 - 1.79	60	1.75	1.49	10	1.49
Necks	1.69	140	1.69	1.79	50	1.79			
Smoked Drumsticks	1.99 - 2.29	190	2.07	1.99 - 2.30	10	2.10			
Smoked Wings	1.99	140	1.99	1.99 - 2.30	10	2.10			
Smoked Necks				1.99 - 2.30	10	2.10			
GROUND TURKEY:									
Patties	3.99 - 4.49	50	4.32	3.49	10	3.49	2.69 - 3.99	150	3.08
Sausage	4.49	20	4.49	4.49	380	4.49	2.66 - 3.99	80	3.18
85% lean	1.99 - 3.07	40	2.29	1.99 - 2.49	230	2.21	2.00 - 2.62	50	2.34
93% lean	2.84 - 3.30	150	3.27				2.79 - 3.19	420	3.09
Breast (99-100% lean)	3.98	10	3.98						
Rolls (frsh/frz 1 lb.)									
Specialty ^{5/}									
Patties	3.99	20	3.99						
93-94% lean									
Breast	5.49 - 6.99	230	6.80	5.49	10	5.49	5.49	40	5.49



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/}	7.3% of 4,000 sampled outlets			14.1% of 2,900 sampled outlets			25.6% 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 = 370			Activity Index = 770			Activity Index = 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									
" - Toms									
Frozen - Hens	0.79 - 1.19	20	0.89						
" - Toms	0.79 - 1.19	20	0.89						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49	10	1.49				1.68	10	1.68
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	4.79	20	4.79						
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.79	50	4.36						
Marinated Tenders				3.66	20	3.66	3.66 - 3.99	80	3.83
Drumsticks	1.19 - 1.28	20	1.23	1.99	70	1.99			
Thighs				1.99	70	1.99			
Wings	1.19	10	1.19	1.99	70	1.99			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.49	60	3.49	3.49	10	3.49	3.99	40	3.99
Sausage				3.19 - 3.27	140	3.23	3.27 - 4.29	60	3.70
85% lean	2.00 - 2.62	60	2.31						
93% lean	3.10 - 3.19	100	3.16	2.79 - 3.19	220	3.17	2.39 - 3.19	180	2.60
Breast (99-100% lean)				4.79	170	4.79			
Rolls (frsh/frz 1 lb.)							2.69	10	2.69
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/09 thru 03/15.

(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		85.3% of 4,400 sampled outlets			58.9% of 6,000 sampled outlets		
Feature Rate ^{1/}	70.8% of 22,500 stores		72.9% of 22,500 stores		78.1% of 19,500 stores		Activity Index = 12,390			Activity Index = 8,290		
Activity Index ^{2/}	43,130		39,650		44,290							
	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	6,640	7.90	3,280	7.93	6,090	7.61	5.48 - 9.99	2,950	8.08	6.99 - 9.49	1,090	7.67
Private Brand	1,020	7.49	5,400	7.43	870	7.55	6.99 - 8.49	530	7.59	6.99 - 8.49	140	7.88
Category 2												
Processor Brand	4,840	5.92	4,950	6.06	6,420	6.03	4.99 - 6.99	2,070	5.88	4.49 - 6.29	670	5.51
Private Brand	3,690	6.63	4,710	6.96	3,160	6.32	4.99 - 6.99	990	6.54	4.99 - 7.59	360	7.04
Category 3												
Processor Brand	860	3.83	730	4.12	680	4.36	2.88 - 3.99	130	3.41	2.88 - 4.59	180	4.00
Private Brand	10	3.77	150	4.17	320	4.98	3.77	10	3.77			
Turkey Ham												
Processor Brand	670	3.63	560	3.32	310	3.55	3.49 - 4.99	400	4.09	3.69 - 3.99	50	3.80
Private Brand												
Turkey Pastrami												
Processor Brand	320	4.41	270	3.73	550	4.27	3.99 - 4.99	210	4.64	3.69 - 3.99	50	3.80
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,750	7.23	4,330	7.33	3,090	7.68	5.99 - 8.99	1,710	7.53	6.99 - 7.99	70	7.54
Private Brand	2,690	6.94	1,360	7.63	1,220	6.90	5.99 - 6.99	570	6.79	6.99 - 7.59	350	7.10
Category 2												
Processor Brand	570	5.35	430	6.18	380	5.28				5.99	210	5.99
Private Brand	110	5.99	200	5.99	220	7.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,730	3.14	5,420	3.10	10,820	3.11	2.49 - 3.99	1,210	3.08	2.00 - 3.89	1,420	3.17
Private Brand	1,360	3.20	540	3.03	1,160	2.92	2.48	10	2.48	1.50 - 3.33	1,070	3.27
Turkey 16 oz												
Processor Brand	1,740	5.21	1,620	5.07	420	4.83	3.68 - 5.49	560	5.39	4.29 - 5.99	160	5.60
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,770	3.16	5,160	3.12	8,040	3.11	2.49 - 3.99	1,030	3.06	2.66 - 3.89	1,400	3.19
Private Brand	1,360	3.20	540	3.03	540	2.95	2.48	10	2.48	1.50 - 3.33	1,070	3.27

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)		
	73.6% of 4,000 sampled outlets			70.4% of 4,000 sampled outlets			65.5% of 2,900 sampled outlets			82.2% of 1,200 sampled outlets		
	Activity Index = 9,700			Activity Index = 7,310			Activity Index = 3,680			Activity Index = 1,760		
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	6.49 - 9.99	760	7.47	5.99 - 8.49	760	7.75	6.99 - 10.49	690	8.07	7.99	390	7.99
Private Brand	6.59 - 9.99	100	7.61	6.98 - 6.99	250	6.99						
Category 2												
Processor Brand	4.49 - 7.49	1,090	6.12	4.99 - 6.00	590	5.84	6.99	170	6.99	5.98 - 5.99	250	5.99
Private Brand	4.48 - 7.99	1,360	6.56	4.99 - 7.99	860	6.45	7.49	40	7.49	7.49 - 8.99	80	8.72
Category 3												
Processor Brand	2.99 - 4.49	160	3.29	3.49 - 4.99	300	4.41	2.69 - 2.99	80	2.84	4.99	10	4.99
Private Brand												
Turkey Ham												
Processor Brand	3.38 - 3.98	20	3.60	2.49	10	2.49	2.49 - 3.28	190	2.68			
Private Brand												
Turkey Pastrami												
Processor Brand	3.29 - 4.28	30	3.92	4.28	30	4.28						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 7.99	700	6.56	5.99 - 9.49	260	6.88				10.99	10	10.99
Private Brand	5.99 - 7.99	1,070	6.65	5.99 - 7.99	450	7.17	7.49	40	7.49	7.49 - 8.99	210	7.97
Category 2												
Processor Brand	3.79 - 5.98	20	4.75	4.99	10	4.99	4.99	330	4.99			
Private Brand	5.99	110	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	2,280	3.06	1.99 - 2.99	1,650	3.13	2.99 - 4.39	810	3.31	2.78 - 4.39	360	3.29
Private Brand					40	3.00	3.00	200	3.00	2.50 - 2.99	40	2.62
Turkey 16 oz												
Processor Brand	4.88 - 5.00	80	4.97	4.99 - 5.00	550	4.99	4.99 - 5.99	370	5.17	4.99	20	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,920	3.12	1.99 - 2.99	1,510	3.15	2.99 - 4.39	560	3.33	2.78 - 4.39	350	3.30
Private Brand					40	3.00	3.00	200	3.00	2.50 - 2.99	40	2.62

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)