



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/16 thru 03/22.

Fri. Mar 16, 2012

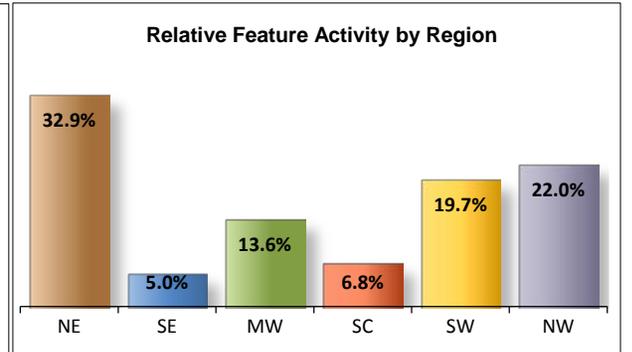
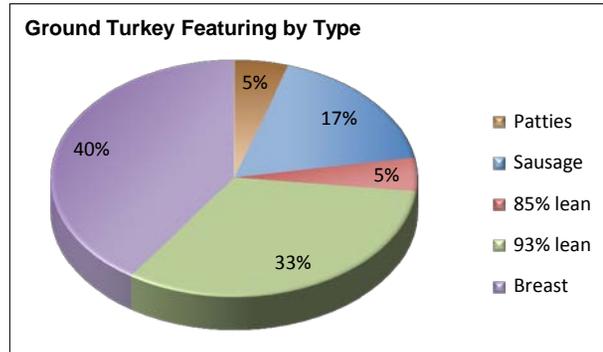
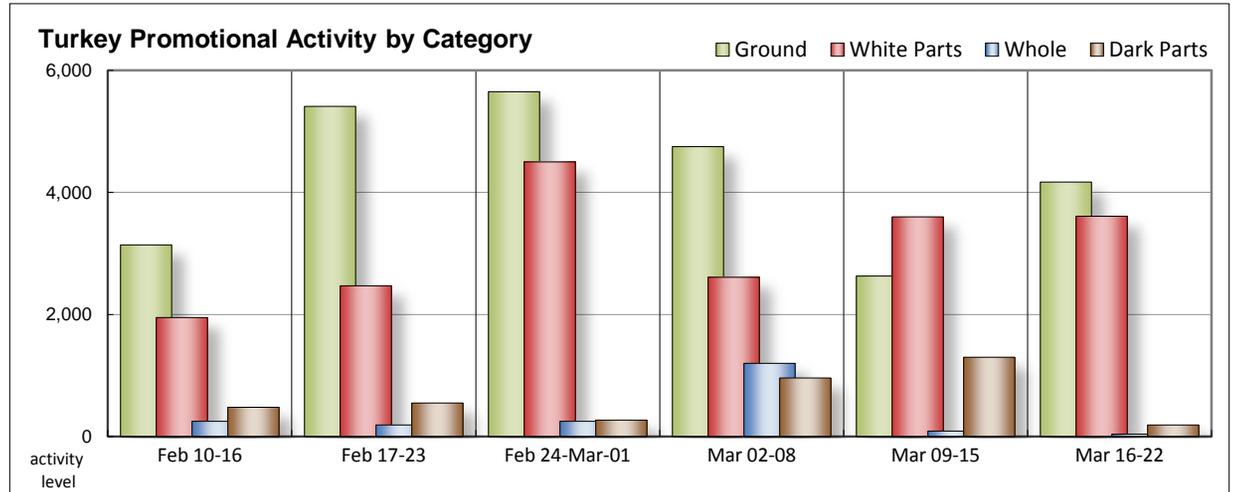
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	29.7% of 22,500 outlets		21.1% of 22,500 outlets		53.7% of 19,500 outlets	
Special Rate ^{4/}	1.0%		0.3%		2.3%	
Activity Index ^{2/}	9,770		8,340		19,100	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	20	1.69				
" - Toms						
Frozen - Hens	10	0.99	50	0.95	50	0.99
" - Toms	10	0.99	40	1.24	110	0.97
PARTS:						
Breast:						
Bone-in, whole						
Fresh					10	1.99
Frozen	1,400	1.86	1,320	1.77	1,350	1.81
Split, bone-in						
Fresh			180	2.99		
Rotisserie	680	7.97	1,180	7.59	260	8.96
Boneless, whole	10	5.99			440	5.10
Cutlets	460	4.90	650	5.13	1,370	5.06
Cutlets, thin sliced	10	4.99	100	4.99	40	4.27
Strips						
Tenders	1,050	4.93	170	4.69	520	5.04
Marinated Tenders	910	4.23	410	4.19	3,750	4.38
Drumsticks	60	1.54	310	1.83	290	1.58
Thighs	10	1.89	160	1.88	70	2.07
Wings	80	1.57	280	1.90	260	1.59
Necks			190	1.72	30	1.28
Smoked Drumsticks	10	1.93	200	2.07	20	1.82
Smoked Wings	20	1.84	150	2.00	20	1.98
Smoked Necks	10	1.69	10	2.10		
GROUND TURKEY:	4,170	3.77	2,630	3.36	9,650	3.15
Patties	200	3.32	320	3.49	1,170	3.16
Sausage	730	3.67	680	4.01	2,120	2.91
85% lean	190	2.36	380	2.25	1,860	2.17
93% lean	1,360	3.29	1,070	3.05	1,950	2.80
Breast	1,690	4.55	180	4.75	2,550	4.34
Rolls (frsh/frz 1 lb.)	20	2.00	10	2.69	700	1.91
Specialty ^{5/}						
Patties	10	4.99	20	3.99		
93-94% lean	800	3.66			140	3.49
Breast	20	5.84	280	6.57		

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

This Week's Turkey Feature Highlights

Retail activity improves going into the middle of the month. Turkey continues to compete with Lenten fish specials and St. Patrick Day corned beef this week, maybe we will see more turkey items next week. Promotions for fresh and frozen whole turkeys are hard to find. Offers increase on frozen bone-in breasts; prices are sharply higher. Not as many rotisserie breasts are making an appearance and prices trend higher. Boneless white cuts get a boost from very active offers on tenders. Prices are lower on cutlets, higher on tenders and marinated tenders. Fewer stores promote dark parts. Retailers increase offers on ground turkey. Ground breast and 93% lean are the most active and provide healthy choices for grilling with the warm weather. Specialty 93-95% lean ground turkey is widely promoted in the circulars. Deli activity slows, mostly due to fewer ads for service deli. Offers increase on Category 1 turkey, fall on Category 1 chicken; Category 2 deli is less active. Self-service deli gains ad space; prices are higher on Processor Brands, lower on Private Brands.



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/}	59.2% of 4,400 sampled outlets			11.2% of 6,000 sampled outlets			21.7% of 4,000 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 3,450			Activity Index = 800			Activity Index = 1,530		
	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	1.69	20	1.69						
" - Toms									
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57 - 2.19	630	1.98	1.78 - 1.99	50	1.95	0.99 - 1.79	180	1.14
Split, bone-in									
Fresh									
Rotisserie	5.99 - 8.99	270	8.22	8.49	50	8.49	7.99	180	7.99
Boneless, whole	5.99	10	5.99						
Cutlets	4.29 - 5.99	400	4.96				4.49	60	4.49
Cutlets, thin sliced	4.99	10	4.99						
Strips									
Tenders	4.49 - 5.79	520	5.08				4.79	80	4.79
Marinated Tenders	3.73 - 4.79	640	4.25	4.26	70	4.26	4.26	180	4.26
Drumsticks									
Thighs	1.89 - 1.98	20	1.92	1.49	10	1.49	1.19 - 1.49	20	1.36
Wings	1.98 - 1.99	20	1.99	1.49 - 1.59	30	1.56	1.89	10	1.89
Necks							1.19 - 1.49	20	1.36
Smoked Drumsticks							1.89 - 1.98	10	1.93
Smoked Wings							1.79 - 1.89	20	1.84
Smoked Necks							1.69	10	1.69
GROUND TURKEY:									
Patties	2.99 - 3.00	50	3.00	3.19	10	3.19	3.43	100	3.43
Sausage	2.49 - 3.99	270	3.58	3.99	290	3.99	2.86 - 3.52	130	3.36
85% lean	2.33 - 3.53	20	2.80	2.19 - 2.39	80	2.21	2.62	30	2.62
93% lean	2.99 - 3.99	420	3.70	2.98	200	2.98	2.79 - 3.99	390	3.47
Breast (99-100% lean)	4.19 - 5.38	150	4.76	3.99	10	3.99	3.32 - 4.31	100	3.99
Rolls (frsh/frz 1 lb.)							1.50	10	1.50
Specialty ^{5/}									
Patties	4.99	10	4.99						
93-94% lean	3.49 - 4.99	690	3.66	3.49	70	3.49	3.49 - 3.99	30	3.82
Breast	5.99	10	5.99						



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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/}	12.5% of 4,000 sampled outlets			55.7% of 2,900 sampled outlets			34.4% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			6.4% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 780			Activity Index = 1,640			Activity Index = 740		
	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									
Frozen	1.59	10	1.59	1.99	490	1.99	1.59	40	1.59
Split, bone-in									
Fresh									
Rotisserie	5.99	50	5.99	7.99	130	7.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	4.79	130	4.79				4.79	320	4.79
Marinated Tenders							3.33	20	3.33
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	40	3.50			
Sausage				2.87	40	2.87			
85% lean	1.99 - 2.62	60	2.28						
93% lean	2.08 - 3.10	80	2.46	2.80 - 3.19	230	2.84	3.19	40	3.19
Breast (99-100% lean)	3.99 - 4.16	400	4.01	4.79	710	4.79	3.99 - 4.79	320	4.77
Rolls (frsh/frz 1 lb.)	2.49	10	2.49						
Specialty ^{5/}									
Patties									
93-94% lean							4.29	10	4.29
Breast							5.69	10	5.69



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 16, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/16 thru 03/22.

(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		88.2% of 4,400 sampled outlets Activity Index = 12,340			73.8% of 6,000 sampled outlets Activity Index = 7,550		
Feature Rate ^{1/}	73.3% of 22,500 stores		70.8% of 22,500 stores		79.1% of 19,500 stores							
Activity Index ^{2/}	36,820		43,130		44,450							
	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	6,090	7.83	6,640	7.90	6,790	7.55	5.98 - 9.99	2,700	8.15	6.98 - 9.99	2,050	7.45
Private Brand	1,650	7.62	1,020	7.49	320	7.69	6.99 - 8.99	1,090	7.89	6.99	430	6.99
Category 2												
Processor Brand	3,350	6.09	4,840	5.92	7,790	5.85	4.97 - 6.99	1,200	6.09	4.99 - 6.99	510	5.80
Private Brand	3,870	6.86	3,690	6.63	1,930	6.49	5.99 - 7.99	1,890	6.56	5.99 - 7.99	140	6.62
Category 3												
Processor Brand	670	4.03	860	3.83	1,070	4.04	3.99 - 4.99	140	4.55	2.99 - 3.99	130	3.77
Private Brand	130	5.49	10	3.77	40	4.48	5.49	130	5.49			
Turkey Ham												
Processor Brand	270	4.17	670	3.63	410	3.55	3.99 - 4.99	200	4.88			
Private Brand												
Turkey Pastrami												
Processor Brand	360	4.70	320	4.41	250	4.05	4.49 - 4.99	260	4.90			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,640	7.50	2,750	7.23	2,680	7.06	5.48 - 8.99	900	7.82			
Private Brand	580	7.16	2,690	6.94	850	7.45	6.99 - 7.49	370	7.14	6.99 - 7.49	110	7.28
Category 2												
Processor Brand	130	6.19	570	5.35	1,310	5.36	5.99	10	5.99	6.99	10	6.99
Private Brand	410	5.47	110	5.99								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,180	3.18	7,730	3.14	7,020	3.08	2.49 - 5.49	1,730	3.16	2.50 - 3.99	1,970	3.26
Private Brand	1,400	2.90	1,360	3.20	2,430	3.07	2.50 - 2.99	60	2.77	2.99	10	2.99
Turkey 16 oz												
Processor Brand	1,880	5.03	1,740	5.21	2,230	5.12	3.99 - 5.99	560	4.85	4.99 - 5.99	290	5.76
Private Brand												
Chicken 7-10 oz												
Processor Brand	5,840	3.22	6,770	3.16	6,900	3.08	2.49 - 5.49	1,070	3.26	2.88 - 3.99	1,890	3.28
Private Brand	1,370	2.90	1,360	3.20	2,430	3.07	2.50 - 2.99	30	2.76	2.99	10	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)



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Fri. Mar 16, 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)		
	79.2% of 4,000 sampled outlets			55.6% of 4,000 sampled outlets			64.0% of 2,900 sampled outlets			77.6% of 1,200 sampled outlets		
	Activity Index = 8,670			Activity Index = 3,680			Activity Index = 3,390			Activity Index = 1,190		
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 - 11.99	720	7.62	7.88 - 8.99	120	8.13	7.99	240	7.99	7.49 - 12.99	260	7.79
Private Brand	6.99 - 8.99	30	8.12	6.99 - 7.49	100	7.23						
Category 2												
Processor Brand	4.49 - 7.49	990	6.51	4.99 - 6.99	480	5.90	4.99	170	4.99			
Private Brand	4.99 - 6.99	490	5.82	4.99 - 8.99	480	7.24	7.99 - 8.99	550	8.50	6.99 - 7.99	320	7.02
Category 3												
Processor Brand	2.99 - 4.58	330	3.96				2.99 - 3.99	50	3.25	4.98	20	4.98
Private Brand												
Turkey Ham												
Processor Brand				2.49 - 2.69	30	2.61	1.79	40	1.79			
Private Brand												
Turkey Pastrami												
Processor Brand	2.98 - 4.99	70	4.14	4.28	30	4.28						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.58 - 7.49	440	6.52	6.98 - 8.99	60	8.08	7.99	240	7.99			
Private Brand	6.99	80	6.99	7.49	20	7.49						
Category 2												
Processor Brand	4.98 - 6.49	110	6.13									
Private Brand	4.99 - 5.99	370	5.53	4.99	40	4.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,430	3.28	2.00 - 2.79	950	3.10	2.99 - 3.99	910	3.01	1.98 - 3.49	190	2.90
Private Brand	2.50 - 3.29	1,070	2.89	2.50 - 3.00	240	2.95				2.50 - 2.99	20	2.76
Turkey 16 oz												
Processor Brand	3.98 - 4.99	80	4.77	4.99 - 5.99	130	5.06	4.98 - 4.99	620	4.99	4.49 - 4.99	200	4.66
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.50 - 3.99	1,390	3.29	2.00 - 2.88	760	3.09	3.00 - 3.99	570	3.02	1.98 - 3.49	160	2.97
Private Brand	2.50 - 3.29	1,070	2.89	2.50 - 3.00	240	2.95				2.50 - 2.99	20	2.76

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)