



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/23 thru 03/29.**

Fri. Mar 23, 2012

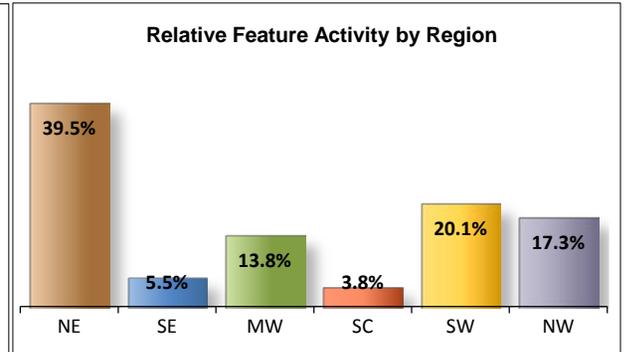
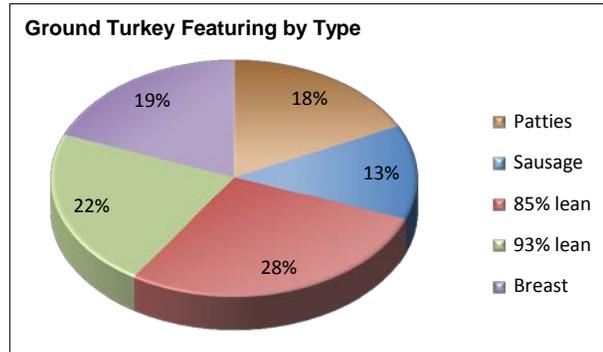
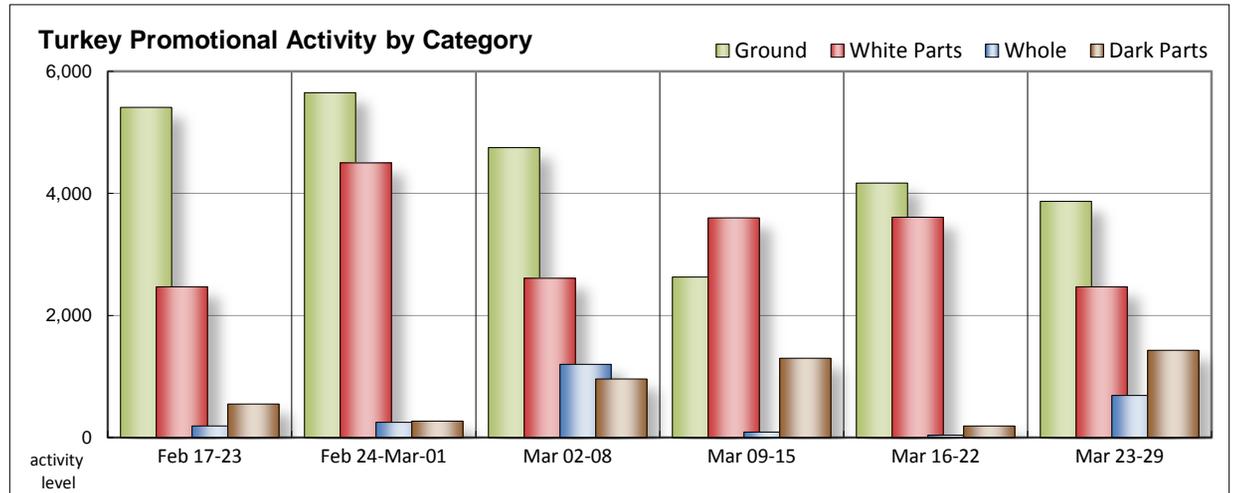
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>23.8% of 22,500 outlets</b>		<b>29.7% of 22,500 outlets</b>		<b>45.8% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>6.6%</b>		<b>1.0%</b>		<b>9.4%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>9,770</b>		<b>9,770</b>		<b>11,460</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	380	1.75	20	1.69		
" - Toms	150	1.94				
Frozen - Hens	80	0.97	10	0.99	90	0.97
" - Toms	80	0.97	10	0.99	80	0.91
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	380	2.84			40	2.39
Frozen	610	1.84	1,400	1.86	490	2.06
Split, bone-in						
Fresh	20	2.94				
Rotisserie	130	8.85	680	7.97	560	6.91
Boneless, whole			10	5.99	30	4.41
Cutlets	800	5.46	460	4.90	570	4.41
Cutlets, thin sliced			10	4.99	250	3.99
Strips	240	5.45				
Tenders	290	4.86	1,050	4.93	200	4.24
Marinated Tenders	250	4.57	910	4.23	1,050	3.71
Drumsticks	490	1.85	60	1.54	40	1.51
Thighs	280	1.99	10	1.89	80	1.90
Wings	450	1.78	80	1.57	50	1.55
Necks	210	1.68			60	1.35
Smoked Drumsticks			10	1.93	20	1.99
Smoked Wings			20	1.84	20	1.99
Smoked Necks			10	1.69		
<b>GROUND TURKEY:</b>	<b>3,870</b>	<b>3.18</b>	<b>4,170</b>	<b>3.77</b>	<b>7,230</b>	<b>2.72</b>
Patties	690	3.09	200	3.32	540	2.85
Sausage	500	3.44	730	3.67	1,590	2.99
85% lean	1,100	2.45	190	2.36	1,920	2.25
93% lean	840	3.04	1,360	3.29	2,470	2.54
Breast	740	4.56	1,690	4.55	710	3.92
Rolls (frsh/frz 1 lb.)	240	2.24	20	2.00	380	2.38
<b>Specialty</b> <sup>5/</sup>						
Patties			10	4.99	10	4.99
93-94% lean	770	3.85	800	3.66	60	4.23
Breast	50	5.09	20	5.84	150	6.43

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

**This Week's Turkey Feature Highlights**

Retail activity slows as the month closes. Both fresh and frozen whole turkeys begin to make an appearance as Easter and Passover near. Frozen bone-in breast offers decline and are at slightly cheaper values. Fresh bone-in breasts reappear. Rotisserie breasts slip in viewing and are at higher levels. Cutlets gain in circular space and pricing. Fresh and marinated tender offers decline; prices are lower for fresh and higher for marinated. Fresh dark parts gain momentum and at higher price levels as the end of the month approaches; smoked parts disappear. 85% lean leads the ground promotions this week and are at higher average prices. Pattie features increase as spring weather brings thoughts of grilling; values are at lower levels. 93% lean, ground breast, and sausage are viewed less frequently. Values are similar to lower compared to last week. Deli activity slows for another week for both service and self-service. Pricing is mixed. Category 1 chicken is the only deli item to increase in viewing this week.



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. Mar 23, 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)		
<b>Feature Rate</b> <sup>1/</sup>	48.9% of 4,400 sampled outlets			13.0% of 6,000 sampled outlets			18.3% of 4,000 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	2.7% of stores w/ no-price promotions			0.7% of stores w/ no-price promotions			2.2% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 4,040			Activity Index = 840			Activity Index = 1,480		
	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	1.39 - 1.99	360	1.75				1.59	20	1.59
" - Toms	1.99	130	1.99				1.59	20	1.59
Frozen - Hens							0.98	70	0.98
" - Toms							0.98	70	0.98
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	1.99 - 2.99	370	2.85						
Frozen	1.57 - 1.97	30	1.74	0.98 - 1.97	210	1.88	1.59 - 1.99	30	1.91
Split, bone-in									
Fresh	2.89	10	2.89						
Rotisserie	6.99 - 8.99	130	8.85						
Boneless, whole									
Cutlets	4.99 - 5.99	470	5.55				4.99	90	4.99
Cutlets, thin sliced									
Strips									
Tenders	5.99	10	5.99						
Marinated Tenders	4.26 - 5.31	170	4.37	4.26	40	4.26	6.99 - 7.99	20	7.49
Drumsticks	1.49 - 1.99	200	1.96				1.49 - 1.79	200	1.78
Thighs	1.99 - 2.49	200	2.06						
Wings	1.49 - 1.99	180	1.96	1.29 - 1.49	20	1.38	1.49 - 1.79	200	1.78
Necks				0.99	10	0.99	1.79	180	1.79
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.21 - 3.99	560	2.88				3.33	20	3.33
Sausage	2.78	100	2.78	2.78	40	2.78	2.80 - 3.18	40	2.85
85% lean	1.99 - 2.63	420	2.36	2.49 - 2.63	230	2.50	2.00 - 2.50	80	2.15
93% lean	2.78 - 3.53	470	3.04	2.99	10	2.99	2.79 - 3.43	200	2.83
Breast (99-100% lean)	3.99 - 4.99	230	4.62	4.79	80	4.79	3.99 - 5.49	200	5.40
Rolls (frsh/frz 1 lb.)				2.38	200	2.38	1.50 - 1.59	40	1.51
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean	3.49 - 4.00	700	3.89	3.49	40	3.49	3.33 - 3.49	30	3.39
Breast	4.79 - 5.99	30	5.62	4.29	20	4.29			



**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)		
<b>Feature Rate</b> <sup>1/</sup>	8.5% of 4,000 sampled outlets			29.0% of 2,900 sampled outlets			42.7% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	9.0% of stores w/ no-price promotions			19.0% of stores w/ no-price promotions			26.7% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 420			Activity Index = 1,600			Activity Index = 570		
	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	0.88	10	0.88						
" - Toms	0.88	10	0.88						
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh							2.49	10	2.49
Frozen	0.98	90	0.98	1.59	20	1.59	1.99 - 2.19	230	2.17
Split, bone-in									
Fresh				2.99	10	2.99			
Rotisserie									
Boneless, whole									
Cutlets				5.45	240	5.45			
Cutlets, thin sliced									
Strips				5.45	240	5.45			
Tenders	4.99	40	4.99	4.79	240	4.79			
Marinated Tenders							3.99	20	3.99
Drumsticks	1.19	10	1.19	1.19	40	1.19	2.49	40	2.49
Thighs				1.19	40	1.19	2.49	40	2.49
Wings	1.19 - 1.39	50	1.35						
Necks	0.99	20	0.99						
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.29 - 4.99	80	4.52	3.00	30	3.00			
Sausage				3.33 - 4.49	280	3.70	4.49	40	4.49
85% lean	2.95	110	2.95	2.33 - 2.80	240	2.41	2.78	20	2.78
93% lean				3.19	130	3.19	2.79 - 3.99	30	3.74
Breast (99-100% lean)				3.99 - 4.99	90	4.22	3.19 - 5.49	140	3.35
Rolls (frsh/frz 1 lb.)									
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

Fri. Mar 23, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/23 thru 03/29.

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

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate <sup>1/</sup>	67.1% of 22,500 stores		73.3% of 22,500 stores		73.4% of 19,500 stores		84.3% of 4,400 sampled outlets			73.7% of 6,000 sampled outlets		
Activity Index <sup>2/</sup>	30,870		36,820		50,590		Activity Index = 9,270			Activity Index = 7,810		
	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
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5,210	8.29	6,090	7.83	5,400	8.01	5.99 - 9.49	2,240	7.99	6.99 - 8.99	2,080	8.47
Private Brand	1,050	7.52	1,650	7.62	2,940	7.87	6.89 - 7.99	670	7.71	6.99 - 7.99	90	7.90
<b>Category 2</b>												
Processor Brand	3,450	6.13	3,350	6.09	10,620	5.79	4.98 - 7.99	980	6.69	4.59 - 6.69	600	5.77
Private Brand	3,780	7.22	3,870	6.86	6,150	6.50	4.99 - 7.99	500	6.32	4.99 - 7.99	330	6.29
<b>Category 3</b>												
Processor Brand	1,150	3.98	670	4.03	810	4.10	3.49 - 4.99	350	3.97	2.49 - 5.99	60	5.19
Private Brand	1,400	5.97	130	5.49	500	4.54	5.48 - 5.99	130	5.83	5.99	40	5.99
<b>Turkey Ham</b>												
Processor Brand	310	3.31	270	4.17	210	3.27	2.98 - 4.99	70	4.41	4.99	30	4.99
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	410	4.02	360	4.70	120	3.62	3.59 - 7.99	330	4.10	4.99	30	4.99
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,040	7.41	1,640	7.50	2,730	7.62	6.98 - 8.99	860	7.60	4.98 - 8.99	410	8.28
Private Brand	470	7.53	580	7.16	70	6.74						
<b>Category 2</b>												
Processor Brand	280	6.10	130	6.19	30	4.18	7.47	20	7.47	5.99	60	5.99
Private Brand	10	4.99	410	5.47	80	5.99				4.99	10	4.99
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	3,010	3.21	7,180	3.18	9,390	3.16	2.50 - 3.99	1,340	3.24	2.50 - 3.99	330	3.25
Private Brand	2,810	2.72	1,400	2.90	1,190	2.99	2.50 - 3.33	150	2.73	2.50 - 3.49	1,700	2.66
<b>Turkey 16 oz</b>												
Processor Brand	450	5.09	1,880	5.03	810	5.02	4.49 - 5.99	350	5.09	4.99 - 5.99	60	5.32
Private Brand					10	4.98						
<b>Chicken 7-10 oz</b>												
Processor Brand	2,460	3.29	5,840	3.22	8,570	3.18	2.50 - 3.99	1,130	3.38	2.50 - 3.99	310	3.28
Private Brand	2,580	2.74	1,370	2.90	960	2.99	2.50 - 3.33	150	2.73	2.50 - 3.49	1,670	2.66

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

Fri. Mar 23, 2012

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)		
	68.8% of 4,000 sampled outlets			48.5% of 4,000 sampled outlets			57.3% of 2,900 sampled outlets			52.3% of 1,200 sampled outlets		
	Activity Index = 5,980			Activity Index = 3,170			Activity Index = 3,610			Activity Index = 1,030		
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	5.99 - 7.99	200	6.92	6.99 - 9.99	320	8.01	6.99 - 10.99	350	10.29	7.99	20	7.99
Private Brand	6.59 - 7.99	90	7.19	6.77 - 6.99	200	6.86						
<b>Category 2</b>												
Processor Brand	4.49 - 6.99	1,130	6.00	4.59 - 6.99	370	5.66	5.99	330	5.99	6.99	40	6.99
Private Brand	4.98 - 7.59	740	6.37	5.99 - 7.99	550	6.97	7.49 - 8.99	1,120	8.37	6.99 - 8.99	540	7.62
<b>Category 3</b>												
Processor Brand	2.98 - 4.99	550	3.98	2.99 - 3.49	60	3.37	2.99 - 5.49	130	3.71			
Private Brand					360	5.99	5.99	550	5.99	5.99	320	5.99
<b>Turkey Ham</b>												
Processor Brand	2.99 - 4.99	20	3.85	1.99	110	1.99	2.79 - 3.99	80	3.38			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	4.99	10	4.99				2.38	40	2.38			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4.58 - 8.99	570	6.55	5.99 - 8.99	180	7.17	7.49	10	7.49	9.99	10	9.99
Private Brand	6.49 - 9.99	60	7.23	6.99 - 7.99	170	7.69	7.49	240	7.49			
<b>Category 2</b>												
Processor Brand	5.99	200	5.99									
Private Brand												
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 3.99	890	3.17	2.00 - 3.99	270	3.28	3.00	130	3.00	2.50 - 2.99	50	2.84
Private Brand	2.50 - 3.49	500	2.75	2.79 - 3.00	210	2.85	2.99	250	2.99			
<b>Turkey 16 oz</b>												
Processor Brand	4.88	10	4.88	4.77	30	4.77						
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.50 - 3.99	710	3.18	2.99 - 3.99	130	3.68	3.00	130	3.00	2.50 - 2.99	50	2.84
Private Brand	2.50 - 3.49	300	2.93	2.79 - 3.00	210	2.85	2.99	250	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)