



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/30 thru 04/05.

Fri. Mar 30, 2012

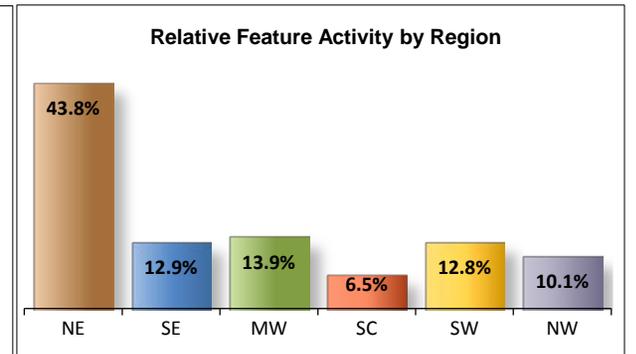
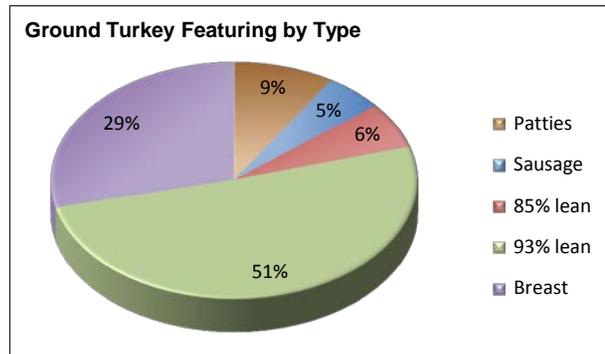
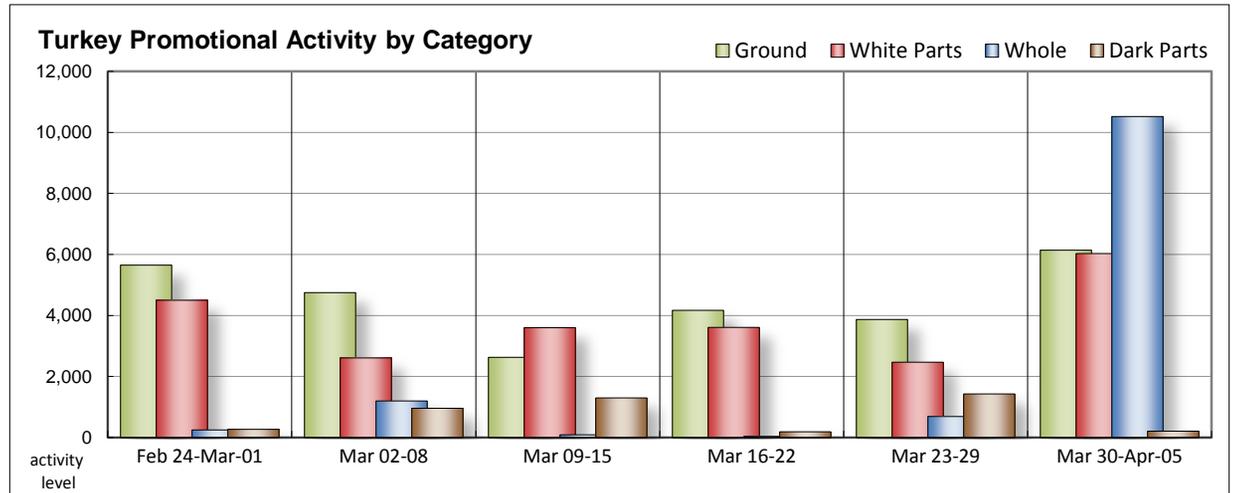
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	51.9% of 22,500 outlets		23.8% of 22,500 outlets		42.0% of 19,500 outlets	
Special Rate ^{4/}	1.7%		6.6%		6.5%	
Activity Index ^{2/}	23,530		9,770		12,290	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	2,230	1.53	380	1.75	30	1.59
" - Toms	1,840	1.52	150	1.94	30	1.59
Frozen - Hens	3,560	1.12	80	0.97	360	0.95
" - Toms	2,890	1.08	80	0.97	360	0.94
PARTS:						
Breast:						
Bone-in, whole						
Fresh	640	2.87	380	2.84	20	2.74
Frozen	3,900	1.84	610	1.84	890	1.81
Split, bone-in						
Fresh	110	2.99	20	2.94	10	2.79
Rotisserie	1,010	8.46	130	8.85	640	6.51
Boneless, whole						
Cutlets	90	5.12	800	5.46	880	4.64
Cutlets, thin sliced	40	5.49				
Strips			240	5.45		
Tenders	20	4.99	290	4.86	370	4.38
Marinated Tenders	260	5.38	250	4.57	690	3.69
Drumsticks	40	1.49	490	1.85	50	1.61
Thighs	20	1.93	280	1.99	30	2.09
Wings	50	1.39	450	1.78	20	1.44
Necks	10	1.69	210	1.68	20	1.29
Smoked Drumsticks	60	1.96			10	1.69
Smoked Wings	30	1.92			50	1.93
Smoked Necks						
GROUND TURKEY:	6,140	3.37	3,870	3.18	7,200	3.26
Patties	550	3.60	690	3.09	530	3.07
Sausage	320	3.58	500	3.44	1,320	2.74
85% lean	390	2.45	1,100	2.45	1,260	2.26
93% lean	3,110	2.90	840	3.04	1,270	3.00
Breast	1,770	4.65	740	4.56	2,820	4.10
Rolls (frsh/frz 1 lb.)	60	2.12	240	2.24	440	2.09
Specialty ^{5/}						
Patties						
93-94% lean	290	3.99	770	3.85	140	3.49
Breast	20	5.79	50	5.09		

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

This Week's Turkey Feature Highlights

Feature activity increases as we head into the holidays; Easter and Passover fall a few weeks earlier compared to last year. Offers on frozen hens and toms are at higher trending prices; fresh prices are more competitive this week. Kosher turkeys are more available. There are plenty of frozen bone-in breasts to choose from and prices are unchanged from last week. Prices on fresh bone-in breasts are higher. Don't want to cook? Rotisserie breasts are widely promoted. Offers on boneless white parts are light. Retailers show little interest in dark meat promotions. Ground turkey is finally getting some attention. The 93% lean is the most prominent, followed by ground breast. Both are leaner, healthier choices. Deli activity increases for the first of the month. Offers increase on service deli Category 1 and Category 2, decrease on Category 3. Self-service deli is more active on Processor Brands and Private Brands; prices are higher on self-service deli. Spring is here, the weather is warm, and some schools are on their spring breaks; good times!



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/}	84.7% of 4,400 sampled outlets			43.2% of 6,000 sampled outlets			44.5% of 4,000 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			5.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 11,020			Activity Index = 4,530			Activity Index = 3,250		
	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	1.29 - 1.99	1,970	1.53	1.29 - 1.49	100	1.33	1.59 - 1.89	150	1.73
" - Toms	1.29 - 1.99	1,580	1.52	1.29 - 1.49	100	1.33	1.59 - 1.89	150	1.73
Frozen - Hens	0.99 - 1.59	1,500	1.29	0.99	1,280	0.99	0.79 - 1.69	440	0.99
" - Toms	0.99 - 1.49	830	1.22	0.99	1,280	0.99	0.79 - 1.79	490	1.07
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.39 - 3.29	510	2.86				2.79	10	2.79
Frozen	1.49 - 1.99	2,060	1.97	1.19 - 1.99	780	1.53	1.49 - 1.99	820	1.89
Split, bone-in									
Fresh	2.99	10	2.99						
Rotisserie	6.99 - 9.99	680	8.29	7.99	70	7.99			
Boneless, whole									
Cutlets	3.99 - 5.49	90	5.12						
Cutlets, thin sliced	5.49	40	5.49						
Strips									
Tenders	5.99	10	5.99						
Marinated Tenders	4.26 - 5.33	150	4.46	4.26	40	4.26			
Drumsticks	1.39	10	1.39				1.49 - 1.98	20	1.69
Thighs							1.89 - 1.98	20	1.93
Wings	1.29	10	1.29	1.29	10	1.29	1.49 - 1.69	20	1.58
Necks							1.69	10	1.69
Smoked Drumsticks	1.99	20	1.99				1.79	10	1.79
Smoked Wings	1.99	20	1.99				1.79	10	1.79
Smoked Necks									
GROUND TURKEY:									
Patties	3.99	60	3.99	3.00 - 3.99	50	3.35	1.88 - 4.49	320	3.86
Sausage	3.11 - 4.00	180	3.48		10	3.49	2.79 - 3.68	100	3.54
85% lean	2.29 - 2.40	40	2.34	2.00 - 2.50	180	2.29	2.00 - 2.99	110	2.80
93% lean	2.80 - 3.30	980	2.94	2.80 - 3.11	610	2.94	2.79 - 3.59	470	2.94
Breast (99-100% lean)	4.79	50	4.79	4.79	20	4.79	3.97 - 4.79	90	4.71
Rolls (frsh/frz 1 lb.)							1.67	10	1.67
Specialty ^{5/}									
Patties									
93-94% lean	3.99	290	3.99						
Breast							5.79	20	5.79



(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/}	29.6% of 4,000 sampled outlets			59.2% of 2,900 sampled outlets			56.3% of 1,200 sampled outlets		
Special Rate ^{4/}	2.9% 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 = 1,530			Activity Index = 2,180			Activity Index = 710		
	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				1.79	10	1.79			
" - Toms				1.79	10	1.79			
Frozen - Hens	0.98 - 1.29	200	1.00	1.00 - 1.29	130	1.07	2.49	10	2.49
" - Toms	0.99 - 1.29	160	1.01	1.00 - 1.29	130	1.07			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.59 - 2.99	70	2.85	2.99	50	2.99			
Frozen	1.49 - 1.59	210	1.58				1.48 - 1.69	30	1.54
Split, bone-in									
Fresh	2.99	50	2.99	2.99	50	2.99			
Rotisserie	9.99	10	9.99	8.99	250	8.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	7.99	70	7.99	3.99	10	3.99			
Drumsticks									
Thighs	1.19	10	1.19						
Wings	1.19	10	1.19						
Necks									
Smoked Drumsticks	1.99	30	1.99						
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				2.80	120	2.80			
Sausage				4.79	20	4.79	3.43	10	3.43
85% lean	2.00 - 2.79	50	2.34				2.33	10	2.33
93% lean	2.80 - 3.59	280	2.87	2.80 - 2.99	690	2.81	2.80 - 3.59	80	2.87
Breast (99-100% lean)	3.99 - 4.79	370	4.29	4.39 - 4.79	710	4.72	4.79 - 4.98	530	4.79
Rolls (frsh/frz 1 lb.)	1.89	10	1.89				2.29	40	2.29
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 30, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/30 thru 04/05.

(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		91.8% of 4,400 sampled outlets Activity Index = 14,500			84.5% of 6,000 sampled outlets Activity Index = 8,550		
Feature Rate ^{1/}	80.4% of 22,500 stores		67.1% of 22,500 stores		79.8% of 19,500 stores							
Activity Index ^{2/}	46,800		30,870		46,500							
	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	3,240	8.18	5,210	8.29	5,300	8.03	5.28 - 9.99	1,520	7.87	6.49 - 8.99	490	8.00
Private Brand	2,450	7.86	1,050	7.52	1,250	7.51	7.99 - 8.99	1,500	8.07	6.99 - 7.99	500	7.12
Category 2												
Processor Brand	7,620	6.11	3,450	6.13	3,430	5.97	4.88 - 7.99	2,430	6.56	4.88 - 6.99	960	6.12
Private Brand	5,200	6.35	3,780	7.22	6,950	6.34	4.99 - 6.99	1,490	6.33	5.98 - 6.99	1,920	6.12
Category 3												
Processor Brand	1,270	3.95	1,150	3.98	1,480	4.25	2.99 - 4.99	260	4.18			
Private Brand			1,400	5.97	1,600	4.78						
Turkey Ham												
Processor Brand	390	2.88	310	3.31	430	3.02	2.99 - 3.99	130	3.43	2.08	20	2.08
Private Brand	40	3.98			20	3.49	3.98	40	3.98			
Turkey Pastrami												
Processor Brand	340	3.97	410	4.02	360	4.71	2.79 - 5.99	160	3.82			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,600	7.40	2,040	7.41	2,350	7.46	5.28 - 9.99	2,350	7.47	4.99 - 8.99	710	7.49
Private Brand	790	7.29	470	7.53	910	7.24	7.69 - 7.99	510	7.93	7.69	70	7.69
Category 2												
Processor Brand	460	6.74	280	6.10	150	5.80	5.99	20	5.99	6.99	210	6.99
Private Brand			10	4.99	200	5.49						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	5,690	3.31	3,010	3.21	10,090	3.07	2.50 - 3.99	940	3.42	2.66 - 3.50	720	3.33
Private Brand	4,150	2.87	2,810	2.72	950	3.00	2.49 - 3.50	840	2.95	2.50 - 2.99	410	2.55
Turkey 16 oz												
Processor Brand	2,370	5.15	450	5.09	470	4.88	4.99 - 5.49	640	5.39	4.99 - 5.49	1,440	5.01
Private Brand												
Chicken 7-10 oz												
Processor Brand	5,140	3.35	2,460	3.29	9,610	3.08	2.50 - 3.99	830	3.38	3.00 - 3.50	690	3.36
Private Brand	4,050	2.86	2,580	2.74	950	3.00	2.49 - 3.50	840	2.95	2.50 - 2.99	410	2.55

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 30, 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)		
	80.4% of 4,000 sampled outlets			73.2% of 4,000 sampled outlets			62.4% of 2,900 sampled outlets			86.6% of 1,200 sampled outlets		
	Activity Index = 9,530			Activity Index = 6,620			Activity Index = 4,430			Activity Index = 3,170		
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 - 8.99	340	7.61	5.98 - 8.99	480	8.08	8.49 - 10.99	380	10.16	7.98 - 12.99	30	9.93
Private Brand	6.49 - 8.99	150	8.77	6.99 - 10.99	290	7.52				9.99	10	9.99
Category 2												
Processor Brand	4.49 - 6.99	1,660	5.91	4.97 - 6.98	1,190	5.73	5.99 - 6.99	750	6.02	4.79 - 6.99	630	5.78
Private Brand	4.99 - 6.99	1,090	6.05	6.29 - 7.99	320	7.33	7.49 - 7.99	170	7.87	7.49	210	7.49
Category 3												
Processor Brand	2.97 - 4.99	590	3.94	2.99 - 4.49	360	3.84	2.99	30	2.99	3.99 - 4.99	30	4.27
Private Brand												
Turkey Ham												
Processor Brand	2.99	10	2.99	1.99 - 3.99	170	2.60	2.59 - 2.98	60	2.73			
Private Brand												
Turkey Pastrami												
Processor Brand	5.99	10	5.99	3.99	150	3.99				3.98	20	3.98
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.99 - 7.99	340	6.81	6.98 - 7.99	180	7.31				6.99 - 7.98	20	7.36
Private Brand	5.49 - 6.99	210	5.60									
Category 2												
Processor Brand	4.98 - 6.99	220	6.64	4.99	10	4.99						
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.50 - 3.99	1,530	3.21	2.00 - 2.59	1,080	3.04	3.49 - 3.99	900	3.59	1.98 - 3.99	520	3.43
Private Brand	2.50 - 3.50	1,020	2.94	2.50 - 2.99	720	2.75	2.50 - 2.99	560	2.75	2.50 - 3.50	600	3.10
Turkey 16 oz												
Processor Brand	4.99	10	4.99	4.77 - 4.98	160	4.80	5.99	120	5.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.50 - 3.99	1,430	3.25	2.00 - 2.99	790	3.14	3.49 - 3.99	900	3.59	2.29 - 3.99	500	3.48
Private Brand	2.50 - 3.50	920	2.93	2.50 - 2.99	720	2.75	2.50 - 2.99	560	2.75	2.50 - 3.50	600	3.10

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)