



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/06 thru 04/12.**

Fri. Apr 06, 2012

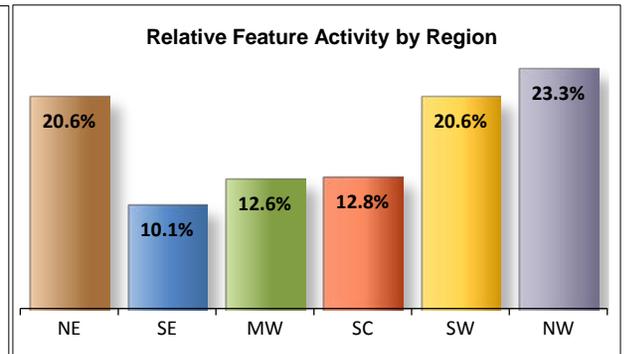
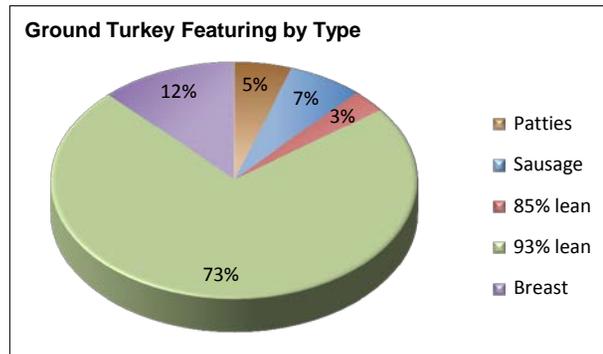
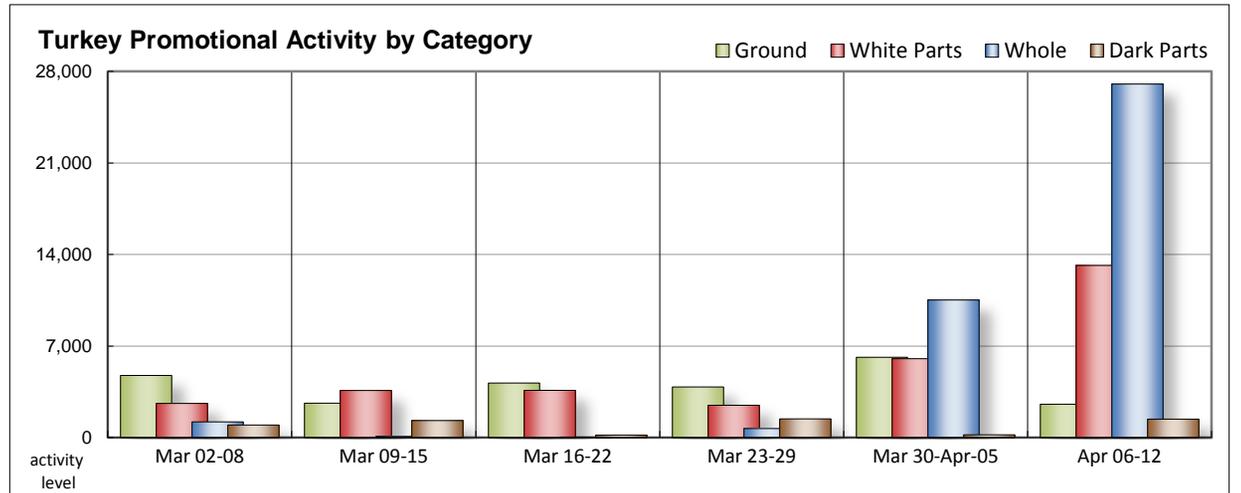
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>71.0% of 22,500 outlets</b>		<b>51.9% of 22,500 outlets</b>		<b>41.9% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>2.8%</b>		<b>1.7%</b>		<b>1.1%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>45,240</b>		<b>23,530</b>		<b>14,690</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	8,010	1.61	2,230	1.53	20	1.49
" - Toms	6,320	1.60	1,840	1.52	20	1.49
Frozen - Hens	6,420	1.08	3,560	1.12	50	1.07
" - Toms	6,280	1.08	2,890	1.08	160	0.92
<b>PARTS:</b>						
<b>Breast:</b>						
<b>Bone-in, whole</b>						
Fresh	1,490	2.72	640	2.87	110	2.99
Frozen	9,460	1.61	3,900	1.84	140	1.56
<b>Split, bone-in</b>						
Fresh			110	2.99	50	2.97
Rotisserie	1,710	8.51	1,010	8.46	660	7.79
<b>Boneless, whole</b>	60	4.60	220	4.59	570	4.49
Cutlets	190	4.78	90	5.12	1,130	4.56
Cutlets, thin sliced	40	5.49	40	5.49		
Strips						
Tenders	210	4.97	20	4.99	370	4.22
Marinated Tenders	780	4.48	260	5.38	440	3.79
Drumsticks	320	1.79	40	1.49	90	1.74
Thighs	130	1.88	20	1.93	90	2.12
Wings	250	1.76	50	1.39	60	1.89
Necks	90	1.63	10	1.69		
Smoked Drumsticks	210	2.02	60	1.96	150	2.16
Smoked Wings	220	2.01	30	1.92	140	2.16
Smoked Necks	190	1.79			270	1.79
<b>GROUND TURKEY:</b>	<b>2,550</b>	<b>3.45</b>	<b>6,140</b>	<b>3.37</b>	<b>9,050</b>	<b>2.77</b>
Patties	130	2.99	550	3.60	990	3.01
Sausage	170	3.87	320	3.58	2,460	2.85
85% lean	80	3.10	390	2.45	2,820	1.97
93% lean	1,860	3.14	3,110	2.90	1,670	2.85
Breast	310	5.14	1,770	4.65	1,110	4.27
Rolls (frsh/frz 1 lb.)	120	2.26	60	2.12	950	2.69
<b>Specialty</b> <sup>5/</sup>						
Patties						
93-94% lean	190	4.01	290	3.99	170	4.24
Breast			20	5.79		

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

**This Week's Turkey Feature Highlights**

Feature activity picks up as retailers offer turkey as an alternative to other holiday meats. Offers increase on fresh and frozen whole turkeys; prices are higher on fresh, unchanged to lower on frozen. Fresh and frozen bone-in breasts are heavily promoted; prices are lower. We won't see this many ads on whole birds and bone-in breasts again until Thanksgiving. Promotions increase on rotisserie breasts and prices are lower this week. Offers on boneless white parts increase on cutlets, tenders and marinated tenders. Marinated tenders are the most active and prices are very attractive. There is a full array of dark parts on sale; prices are mixed. Retailer's lose interest in ground turkey promotions. The 93% lean is the most active; prices are higher on everything except patties. Fewer stores offer deli items. The big difference is a steep drop in service deli Category 2 promotions. Offers increase on Category 1, fall on Category 3. Self-service deli activity increases on Processor Brands; fewer stores offer 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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Fri. Apr 06, 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)		
Feature Rate <sup>1/</sup>	84.2% of 4,400 sampled outlets			62.6% of 6,000 sampled outlets			70.3% of 4,000 sampled outlets		
Special Rate <sup>4/</sup>	0.1% of stores w/ no-price promotions			1.4% of stores w/ no-price promotions			3.2% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 11,870			Activity Index = 8,030			Activity Index = 6,690		
	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	1.19 - 1.99	2,640	1.62	1.29 - 1.69	550	1.49	1.38 - 2.29	1,150	1.77
" - Toms	1.29 - 1.99	1,810	1.56	1.49 - 1.69	300	1.52	1.38 - 2.29	1,070	1.75
Frozen - Hens	0.98 - 1.49	1,160	1.24	0.88 - 1.29	1,670	1.02	0.79 - 1.49	790	1.15
" - Toms	0.98 - 1.49	930	1.23	0.88 - 1.19	1,520	1.02	0.79 - 1.49	1,050	1.19
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	1.69 - 3.49	790	2.86	2.29 - 2.49	320	2.37	2.49 - 2.99	30	2.64
Frozen	0.99 - 1.99	1,790	1.70	0.99 - 1.99	3,060	1.46	0.99 - 1.99	1,690	1.64
Split, bone-in									
Fresh									
Rotisserie	5.99 - 7.99	210	7.40	7.99	150	7.99	8.99 - 9.99	260	9.69
Boneless, whole									
Cutlets	3.99 - 5.49	60	4.60	4.99	20	4.99			
Cutlets, thin sliced	4.99 - 5.49	80	5.25						
Strips	5.49	40	5.49						
Tenders	4.99	190	4.99						
Marinated Tenders	4.26	510	4.26	4.26	70	4.26	5.33	180	5.33
Drumsticks	1.39 - 2.19	230	1.84	1.79	50	1.79	1.39 - 1.69	30	1.52
Thighs	1.29 - 2.99	110	1.90				1.50 - 1.89	20	1.72
Wings	1.99	120	1.99	1.39 - 1.79	90	1.60	1.39 - 1.69	30	1.52
Necks				1.40 - 1.79	80	1.62	1.69	10	1.69
Smoked Drumsticks	1.99	190	1.99	2.15 - 2.30	20	2.26			
Smoked Wings	1.99	190	1.99	2.15 - 2.30	20	2.26	1.79	10	1.79
Smoked Necks	1.79	190	1.79						
<b>GROUND TURKEY:</b>									
Patties									
Sausage	3.19 - 3.99	160	3.91						
85% lean	3.19	50	3.19	2.49 - 3.19	30	2.95			
93% lean	2.80 - 3.69	410	3.02	3.00 - 3.19	80	3.10	2.80 - 3.19	100	3.12
Breast (99-100% lean)	5.38	10	5.38				5.59	180	5.59
Rolls (frsh/frz 1 lb.)							1.88 - 2.50	90	2.39
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean	3.99	180	3.99				4.29	10	4.29
Breast									



(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>	62.0% of 4,000 sampled outlets			78.2% of 2,900 sampled outlets			79.5% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	5.8% of stores w/ no-price promotions			5.4% of stores w/ no-price promotions			1.2% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 6,800			Activity Index = 7,940			Activity Index = 3,720		
	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	1.29 - 1.49	1,350	1.54	1.29 - 2.19	1,570	1.57	1.48 - 1.79	750	1.60
" - Toms	1.29 - 1.49	1,310	1.55	1.49 - 2.19	1,080	1.59	1.48 - 1.79	750	1.60
Frozen - Hens	0.59 - 0.99	820	1.11	0.59 - 1.39	1,630	0.92	0.99 - 1.49	350	1.29
" - Toms	0.59 - 0.99	800	1.12	0.59 - 1.39	1,630	0.92	0.99 - 1.49	350	1.29
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.49 - 3.19	80	2.77	2.79	130	2.79	2.29 - 2.78	140	2.63
Frozen	0.99 - 1.59	1,530	1.70	0.99 - 1.99	780	1.56	0.99 - 1.99	610	1.83
Split, bone-in									
Fresh									
Rotisserie	7.99 - 10.99	480	8.76	7.99	270	7.99	7.99 - 8.99	340	8.58
Boneless, whole									
Cutlets				3.99	70	3.99	5.45	20	5.45
Cutlets, thin sliced									
Strips									
Tenders							4.79	20	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									
<b>GROUND TURKEY:</b>									
Patties				2.99	130	2.99			
Sausage							3.27	10	3.27
85% lean									
93% lean	3.19	380	3.19	3.19	550	3.19	3.19	340	3.19
Breast (99-100% lean)				3.99 - 5.19	100	4.37	4.79	20	4.79
Rolls (frsh/frz 1 lb.)	1.88	30	1.88						
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

Fri. Apr 06, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/06 thru 04/12.

(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		78.4% of 4,400 sampled outlets Activity Index = 11,340			41.0% of 6,000 sampled outlets Activity Index = 5,950		
Feature Rate <sup>1/</sup>	59.6% of 22,500 stores		80.4% of 22,500 stores		78.5% of 19,500 stores							
Activity Index <sup>2/</sup>	35,780		46,800		46,200							
	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	4,870	7.51	3,240	8.18	5,860	7.23	5.99 - 9.99	1,580	7.89	5.99 - 8.99	590	7.23
Private Brand	2,320	7.86	2,450	7.86	2,580	7.56	5.97 - 9.99	1,800	7.91	6.99 - 7.49	50	7.08
<b>Category 2</b>												
Processor Brand	2,890	6.11	7,620	6.11	5,880	6.10	4.98 - 7.99	970	5.93	4.99 - 7.99	350	6.29
Private Brand	3,240	6.51	5,200	6.35	4,780	6.12	5.99 - 6.99	950	6.78	5.99 - 6.99	1,250	6.12
<b>Category 3</b>												
Processor Brand	540	4.09	1,270	3.95	1,550	4.25	3.99 - 5.99	160	4.57	3.99	30	3.99
Private Brand	40	5.48			470	5.50	5.48	40	5.48			
<b>Turkey Ham</b>												
Processor Brand	630	3.60	390	2.88	140	3.22	2.79 - 4.49	510	3.77	2.89	40	2.89
Private Brand			40	3.98								
<b>Turkey Pastrami</b>												
Processor Brand	260	4.41	340	3.97	260	4.21	3.99 - 4.49	240	4.42			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,670	7.28	3,600	7.40	4,540	7.29	5.99 - 9.99	1,360	7.64	4.99 - 8.99	640	7.27
Private Brand	1,800	7.28	790	7.29	970	6.61	6.99 - 7.99	1,340	7.29			
<b>Category 2</b>												
Processor Brand	360	6.59	460	6.74	390	6.31						
Private Brand	160	5.99			180	6.49	5.99	120	5.99			
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	6,680	3.32	5,690	3.31	5,640	3.11	1.98 - 4.00	800	3.45	2.25 - 3.99	1,520	3.30
Private Brand	1,200	3.10	4,150	2.87	3,760	3.19	3.00 - 3.49	360	3.30			
<b>Turkey 16 oz</b>												
Processor Brand	480	5.12	2,370	5.15	580	5.17	4.49 - 4.99	150	4.91	5.99	10	5.99
Private Brand	160	5.49			10	3.99	5.49	120	5.49			
<b>Chicken 7-10 oz</b>												
Processor Brand	6,280	3.32	5,140	3.35	5,040	3.10	1.98 - 4.00	480	3.50	2.50 - 3.99	1,470	3.33
Private Brand	1,200	3.10	4,050	2.86	3,570	3.21	3.00 - 3.49	360	3.30			

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)



**USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**  
 Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/06 thru 04/12.  
 (prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Apr 06, 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)		
	67.1% of 4,000 sampled outlets			57.6% of 4,000 sampled outlets			57.3% of 2,900 sampled outlets			69.8% of 1,200 sampled outlets		
	Activity Index = 6,340			Activity Index = 5,760			Activity Index = 4,160			Activity Index = 2,230		
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	5.98 - 9.99	420	7.78	5.49 - 7.99	1,230	6.64	6.99 - 10.49	640	8.03	6.98 - 8.99	410	7.98
Private Brand	7.49 - 9.99	70	8.38	6.99 - 7.99	270	7.27	8.49	130	8.49			
<b>Category 2</b>												
Processor Brand	4.49 - 7.99	1,150	6.22	4.99 - 6.99	130	6.26				5.99	290	5.99
Private Brand	5.98 - 6.99	720	6.63	4.99 - 7.49	320	6.95						
<b>Category 3</b>												
Processor Brand	1.99 - 4.49	110	3.61	2.97 - 4.99	180	4.13	2.99 - 3.49	40	3.43	3.98	20	3.98
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	3.58	10	3.58	1.99 - 2.59	40	2.40	3.28 - 3.49	30	3.35			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand					20	4.35						
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4.99 - 7.99	190	6.66	5.79 - 8.49	470	6.49				8.49	10	8.49
Private Brand	6.99	240	6.99	7.99	20	7.99				7.49	200	7.49
<b>Category 2</b>												
Processor Brand	5.49 - 6.99	360	6.59									
Private Brand	5.99	40	5.99									
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.50 - 3.99	1,180	3.27	2.39 - 2.99	1,320	3.17	2.99 - 4.29	1,280	3.42	2.99 - 4.29	580	3.37
Private Brand	2.98 - 3.50	270	3.05	3.00	120	3.00	2.99	380	2.99	3.00	70	3.00
<b>Turkey 16 oz</b>												
Processor Brand	4.99 - 5.99	90	5.78	4.88 - 4.99	230	4.97						
Private Brand	5.49	40	5.49									
<b>Chicken 7-10 oz</b>												
Processor Brand	2.50 - 3.99	1,180	3.27	2.50 - 3.15	1,290	3.18	2.99 - 4.29	1,280	3.42	2.99 - 4.29	580	3.37
Private Brand	2.98 - 3.50	270	3.05	3.00	120	3.00	2.99	380	2.99	3.00	70	3.00

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)