



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/27 thru 05/03.

Fri. Apr 27, 2012

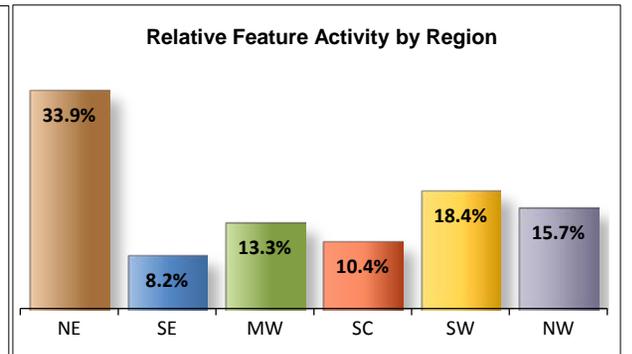
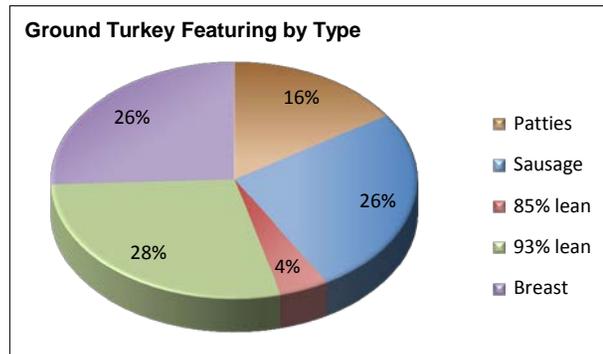
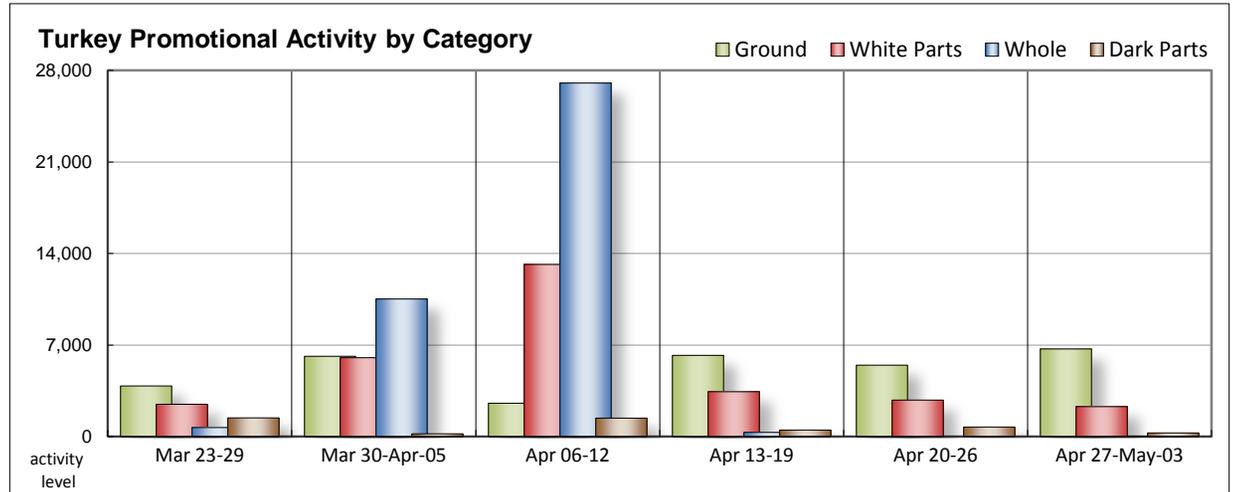
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	34.0% of 22,500 outlets		32.1% of 22,500 outlets		42.8% of 19,500 outlets	
Special Rate ^{4/}	0.9%		0.6%		4.2%	
Activity Index ^{2/}	11,470		10,330		13,610	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	10	1.38			10	1.49
" - Toms	10	1.38			10	1.49
Frozen - Hens					40	0.99
" - Toms					50	1.07
PARTS:						
Breast:						
Bone-in, whole						
Fresh					40	1.85
Frozen	850	1.77	330	1.79	20	1.59
Split, bone-in						
Fresh						
Rotisserie	350	7.54	770	7.84	320	7.08
Boneless, whole			230	4.24	170	5.57
Cutlets	850	4.72	800	5.08	790	4.74
Cutlets, thin sliced			110	5.05	350	4.99
Strips	20	3.99	20	3.99		
Tenders	220	4.52	530	4.88	580	4.63
Marinated Tenders	910	4.32	620	4.47	1,070	4.15
Drumsticks	140	1.56	170	1.99	90	1.50
Thighs	40	1.39	260	1.92	70	2.03
Wings	60	1.36	200	1.87	50	1.34
Necks			40	1.40	30	1.27
Smoked Drumsticks	20	1.99	30	1.99	40	2.31
Smoked Wings	20	1.99	30	1.99	60	2.01
Smoked Necks					40	1.59
GROUND TURKEY:	6,700	3.55	5,460	3.54	8,980	2.96
Patties	1,060	3.33	400	3.29	2,090	2.79
Sausage	1,730	3.42	1,460	3.74	1,230	2.86
85% lean	290	2.45	920	2.34	1,940	2.25
93% lean	1,900	3.40	1,560	3.23	2,380	2.83
Breast	1,720	4.31	1,120	4.71	1,340	4.55
Rolls (frsh/frz 1 lb.)	510	2.96	160	2.52	630	2.25
Specialty ^{5/}						
Patties	380	4.99	20	4.99		
93-94% lean	320	4.41	310	4.62	140	3.49
Breast	60	5.50	240	7.39		

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

This Week's Turkey Feature Highlights

Stores increase their offerings on turkey as we head into May and start to fire up the grills. Feature activity on bone-in breasts takes off; there are plenty to choose from and prices are lower this week. If a bone-in breast is too much of a good thing, try one of the boneless breast parts. Why not check out marinated tenders or cutlets for dinner; promotional activity is higher and prices are lower. Offerings on dark parts decrease, but lower prices on the fresh parts are sure to tempt the price conscious consumer. Ground turkey promotions increase as we head into the grilling season. Offerings increase on all types of ground turkey except the 85% lean, which has all but disappeared from the ad pages. Prices are lower on sausage and ground breast, higher on the other grinds. Promotional activity for deli meats is slightly higher with service deli taking a larger share of the ads. Most advertised prices are higher on service deli, lower on self-service deli. Graduations are on the horizon! It's time to place those orders for deli platters or to create your own deli trays for this month's celebrations.



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/}	59.9% of 4,400 sampled outlets			15.3% of 6,000 sampled outlets			32.0% of 4,000 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			4.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 4,040			Activity Index = 1,520			Activity Index = 1,620		
	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							1.38	10	1.38
" - Toms							1.38	10	1.38
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 2.00	320	1.74	1.48 - 1.97	390	1.72	1.99 - 2.00	130	2.00
Split, bone-in									
Fresh									
Rotisserie	5.99 - 8.99	340	7.46				9.99	10	9.99
Boneless, whole									
Cutlets	3.49 - 5.49	420	4.99	4.98	200	4.98	3.99	170	3.99
Cutlets, thin sliced									
Strips									
Tenders	4.49 - 5.49	200	4.57						
Marinated Tenders	4.26 - 4.79	650	4.31	4.26 - 4.99	100	4.53	4.99	20	4.99
Drumsticks							1.39 - 1.69	90	1.67
Thighs									
Wings							1.39	10	1.39
Necks									
Smoked Drumsticks	1.99	20	1.99						
Smoked Wings	1.99	20	1.99						
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 3.79	400	3.35	3.00	240	3.00	2.69 - 3.99	270	3.66
Sausage	2.79 - 4.49	900	3.31	3.00 - 4.49	210	4.38	2.86 - 3.49	310	3.28
85% lean	2.33 - 3.19	60	3.03	2.19 - 3.19	90	2.40	1.79 - 2.79	80	2.24
93% lean	2.92 - 3.69	340	3.19	3.07 - 4.79	250	3.31	2.79 - 3.99	400	3.47
Breast (99-100% lean)	3.84 - 5.38	370	4.50	3.84	40	3.84	4.79	80	4.79
Rolls (frsh/frz 1 lb.)							2.59	30	2.59
Specialty ^{5/}									
Patties	4.00 - 5.99	380	4.99						
93-94% lean	4.49 - 4.99	230	4.55	3.99	30	3.99	3.99	30	3.99
Breast	5.99 - 6.99	30	6.31				4.19	20	4.19



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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/}	22.4% of 4,000 sampled outlets			46.8% of 2,900 sampled outlets			47.4% 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 = 1,290			Activity Index = 1,670			Activity Index = 570		
	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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen							1.89	10	1.89
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	3.99	60	3.99						
Cutlets, thin sliced									
Strips	3.99	20	3.99						
Tenders	3.99	20	3.99						
Marinated Tenders	3.73 - 4.66	140	4.14						
Drumsticks	1.19	10	1.19	1.39	40	1.39			
Thighs				1.39	40	1.39			
Wings	1.19	10	1.19	1.39	40	1.39			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.27	120	3.27	3.00	30	3.00			
Sausage	3.27 - 3.52	140	3.32	2.46 - 3.27	170	3.11			
85% lean	2.00	30	2.00	2.40	30	2.40			
93% lean	2.80 - 4.79	340	4.12	2.80 - 3.99	530	3.08	3.11	40	3.11
Breast (99-100% lean)	4.79	360	4.79	3.99	550	3.99	3.99 - 4.79	320	4.01
Rolls (frsh/frz 1 lb.)	2.89	40	2.89	2.99	240	2.99	2.99	200	2.99
Specialty ^{5/}									
Patties									
93-94% lean	3.99	20	3.99				4.39	10	4.39
Breast							5.69	10	5.69



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Apr 27, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/27 thru 05/03.

(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		87.2% of 4,400 sampled outlets Activity Index = 15,260			57.9% of 6,000 sampled outlets Activity Index = 7,800		
Feature Rate ^{1/}	68.9% of 22,500 stores		66.3% of 22,500 stores		71.3% of 19,500 stores							
Activity Index ^{2/}	43,680		43,510		41,160							
	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	4,800	7.92	5,040	8.06	4,030	7.69	5.98 - 10.49	2,680	7.97	5.99 - 9.99	560	8.52
Private Brand	1,650	7.24	2,440	7.74	610	7.44	6.79 - 8.99	570	7.05	6.99 - 8.49	740	7.15
Category 2												
Processor Brand	5,450	6.12	4,430	6.20	7,160	6.01	4.99 - 7.99	1,340	6.33	4.09 - 6.99	1,230	6.48
Private Brand	4,450	7.02	2,040	7.01	6,590	6.85	4.99 - 6.99	1,690	6.48			
Category 3												
Processor Brand	1,300	3.63	1,130	4.12	1,950	4.12	3.99 - 4.99	200	4.12	2.88 - 3.99	300	3.78
Private Brand	2,420	5.43	2,830	4.95	1,390	4.83	3.99 - 5.99	170	5.46	4.99 - 5.99	180	5.23
Turkey Ham												
Processor Brand	520	3.56	240	3.11	540	2.91	3.98 - 4.99	310	4.58	2.59	30	2.59
Private Brand	60	3.98			230	4.81	3.98 - 3.99	60	3.98			
Turkey Pastrami												
Processor Brand	340	3.99	190	4.14	450	4.82	3.99	320	3.99			
Private Brand					190	4.98						
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,770	7.79	2,150	7.58	1,150	7.24	5.48 - 9.49	2,040	7.94	5.99 - 7.99	240	6.99
Private Brand	1,870	6.25	840	7.06	1,930	7.34	5.99 - 7.99	1,210	6.37			
Category 2												
Processor Brand	260	6.76	490	6.40	280	6.65				6.99	10	6.99
Private Brand	10	3.98	160	5.99								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	4,380	3.13	7,480	3.00	5,180	3.21	2.49 - 4.00	1,510	3.34	1.99 - 3.79	1,800	3.05
Private Brand	3,250	3.10	3,730	2.75	2,380	2.79	2.50 - 3.33	870	2.75	2.50 - 3.00	410	2.92
Turkey 16 oz												
Processor Brand	3,090	4.42	380	5.85	440	5.18	3.99 - 4.99	410	4.34	3.99 - 4.50	270	4.35
Private Brand	170	4.99			30	4.99						
Chicken 7-10 oz												
Processor Brand	3,640	3.09	6,620	2.97	4,250	3.26	2.49 - 4.00	1,010	3.26	1.99 - 3.79	1,620	3.05
Private Brand	3,250	3.10	3,320	2.77	2,380	2.79	2.50 - 3.33	870	2.75	2.50 - 3.00	410	2.92

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)		
	72.7% of 4,000 sampled outlets			58.7% of 4,000 sampled outlets			71.2% of 2,900 sampled outlets			70.8% of 1,200 sampled outlets		
	Activity Index = 8,380			Activity Index = 5,670			Activity Index = 4,350			Activity Index = 2,220		
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	5.99 - 8.99	590	7.16	5.99 - 9.49	510	7.61	8.99	10	8.99	7.99 - 12.99	450	8.17
Private Brand	6.79 - 8.49	70	7.46	6.99 - 7.99	150	7.31	8.49	120	8.49			
Category 2												
Processor Brand	3.99 - 6.99	1,550	5.76	4.99 - 6.99	900	5.99	5.99 - 6.99	390	6.01	4.99 - 6.99	40	5.59
Private Brand	4.99 - 7.99	740	6.05	5.99 - 7.99	510	7.40	5.99 - 8.99	990	8.17	6.99 - 8.99	520	7.58
Category 3												
Processor Brand	2.95 - 4.49	430	3.67	2.99 - 4.99	290	3.18	2.99 - 3.29	70	3.15	3.98	10	3.98
Private Brand	4.99 - 5.99	450	5.31	4.99 - 5.99	750	5.27	4.99 - 5.99	550	5.48	5.99	320	5.99
Turkey Ham												
Processor Brand				1.49 - 2.49	130	1.63	2.79 - 2.99	50	2.83			
Private Brand												
Turkey Pastrami												
Processor Brand										3.99	20	3.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.95 - 7.99	270	6.46	6.98 - 9.49	210	8.90				8.49	10	8.49
Private Brand	5.49 - 5.99	560	5.81	6.99 - 7.99	100	7.22						
Category 2												
Processor Brand	4.98 - 6.99	210	6.71	6.99	40	6.99						
Private Brand	3.98	10	3.98									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	570	2.97	1.67 - 2.89	310	2.93	2.99	170	2.99	3.00 - 3.99	20	3.56
Private Brand	2.79 - 3.33	1,050	3.04	2.99 - 3.99	280	3.38	3.00 - 3.99	440	3.55	3.99	200	3.99
Turkey 16 oz												
Processor Brand	3.99 - 5.77	280	5.18	4.88 - 5.00	940	4.63	3.99 - 4.99	780	4.04	3.99 - 5.29	410	4.26
Private Brand							4.99	170	4.99			
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	550	2.96	1.67 - 3.19	270	2.95	2.99	170	2.99	3.00 - 3.99	20	3.56
Private Brand	2.79 - 3.33	1,050	3.04	2.99 - 3.99	280	3.38	3.00 - 3.99	440	3.55	3.99	200	3.99

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)

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