



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/18 thru 05/24.

Fri. May 18, 2012

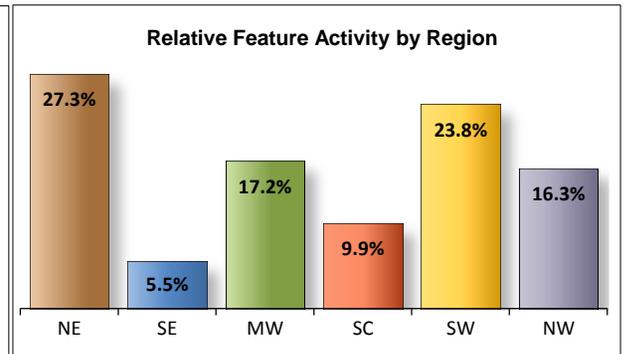
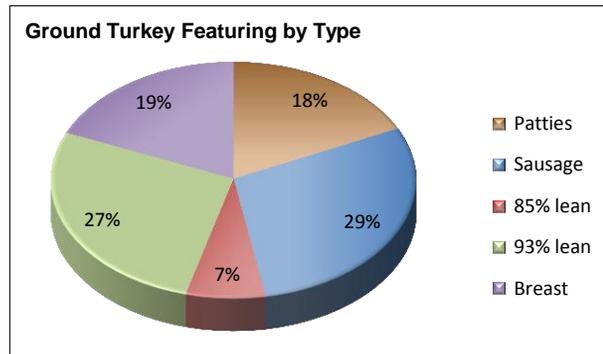
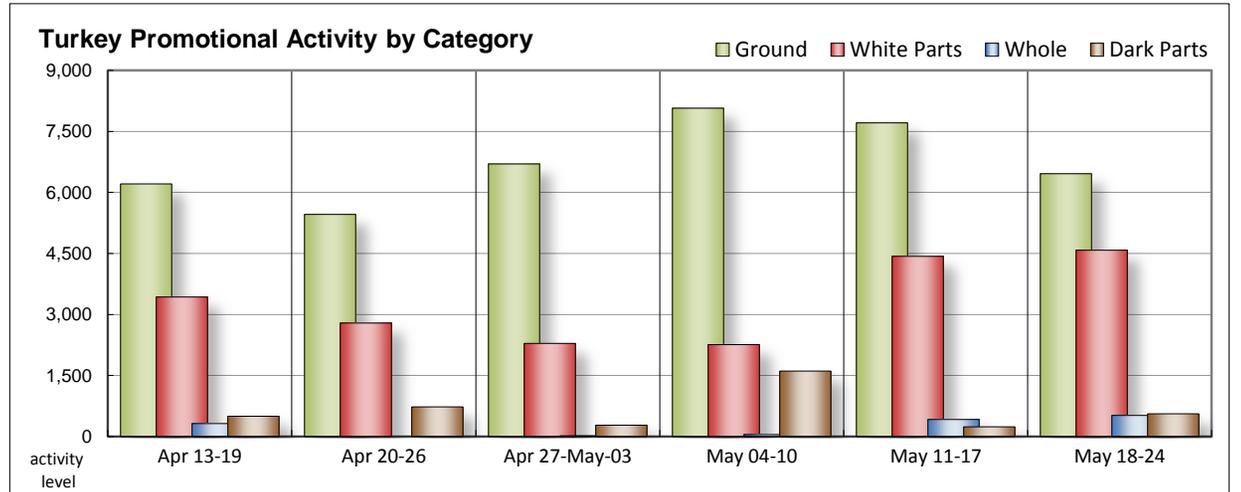
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	35.9% of 22,500 outlets		36.0% of 22,500 outlets		49.6% of 19,500 outlets	
Special Rate ^{4/}	1.4%		0.0%		4.6%	
Activity Index ^{2/}	12,890		13,590		15,220	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	60	1.59	10	1.59		
" - Toms						
Frozen - Hens	230	1.10	100	1.00	150	1.19
" - Toms	230	1.10	310	1.19	270	1.06
PARTS:						
Breast:						
Bone-in, whole						
Fresh	30	2.68	50	2.26	10	2.99
Frozen	2,540	1.15	950	1.72	570	1.62
Split, bone-in						
Fresh	100	2.99	200	2.99		
Rotisserie	110	7.99	480	7.55	900	7.93
Boneless, whole						
Cutlets	670	4.87	1,240	4.57	820	4.60
Cutlets, thin sliced	100	4.99	20	4.49		
Strips	240	5.45	20	4.49	20	3.99
Tenders	790	4.39	1,070	4.43	90	3.99
Marinated Tenders	480	4.41	360	4.30	560	4.70
Drumsticks	160	1.63	40	1.65	260	1.74
Thighs	120	1.97	30	1.96	250	1.81
Wings	60	1.82	60	1.51	360	1.70
Necks	100	1.40			10	1.29
Smoked Drumsticks	80	2.29	10	2.25	140	2.25
Smoked Wings	40	2.29	70	1.99	70	2.21
Smoked Necks			30	2.08	20	1.79
GROUND TURKEY:	6,460	3.47	7,710	3.53	9,190	2.96
Patties	1,160	3.68	540	3.73	840	3.06
Sausage	1,890	3.41	790	3.29	1,700	2.98
85% lean	450	2.64	1,230	2.97	2,510	2.29
93% lean	1,760	3.23	2,460	3.07	2,850	2.84
Breast	1,200	4.08	2,690	4.32	1,290	4.42
Rolls (frsh/frz 1 lb.)	60	1.97	200	2.73	1,170	2.20
Specialty ^{5/}						
Patties	50	5.97	30	6.65	20	4.49
93-94% lean	160	3.46	190	4.24	90	3.99
Breast	20	5.00	10	6.99	20	5.11

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

This Week's Turkey Feature Highlights

Turkey retail activity declines this week. Whole bird offers are similar to the previous week with pricing higher for hens and lower for toms. There are more possibilities of grilling or smoking a bone-in breast this week; pricing is lower for frozen and higher for fresh. Rotisserie breasts are less visible, at higher price levels. Offerings of white parts decline overall but thin sliced cutlets, strips, and marinated tenders increase in viewing. Fresh tender prices decrease, while the balance of white parts prices increase. Both fresh and smoked dark part offers gain more attention; price levels are steady to higher. Ground turkey advertisements decrease from the previous week, attention is focused on the grill with sausage and patties most visible. Patties, 85% lean, and ground breast pricing drop, while sausage and 93% lean are up. Deli activity increases allowing the opportunity to cover those graduation needs. Service deli prices trend steady to higher with self-service pricing mixed.



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/}	48.9% of 4,400 sampled outlets			16.2% of 6,000 sampled outlets			40.9% of 4,000 sampled outlets		
Special Rate ^{4/}	0.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			6.1% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 4,430			Activity Index = 1,210			Activity Index = 2,530		
	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	1.59	60	1.59						
" - Toms									
Frozen - Hens							0.99 - 1.18	130	1.17
" - Toms							0.99 - 1.18	130	1.17
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69 - 2.99	20	2.87				2.29	10	2.29
Frozen	0.99 - 1.97	480	1.20	0.99 - 1.97	680	1.27	0.99 - 1.88	680	1.14
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	3.99 - 4.99	350	4.56	3.99 - 4.99	60	4.32	4.99	20	4.99
Cutlets, thin sliced	4.99	100	4.99						
Strips									
Tenders	3.99	150	3.99	3.99	40	3.99	3.99	100	3.99
Marinated Tenders	3.73 - 4.79	410	4.36				4.66	70	4.66
Drumsticks	1.29 - 1.99	80	1.59	1.39 - 1.79	60	1.73			
Thighs	2.49	30	2.49				1.79	90	1.79
Wings	1.99	10	1.99	1.79	50	1.79			
Necks				0.99 - 1.79	60	1.67			
Smoked Drumsticks	2.19 - 2.79	70	2.33				1.98	10	1.98
Smoked Wings	2.49 - 2.79	20	2.68				1.79 - 1.98	20	1.89
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 4.00	680	3.54	3.69 - 3.99	30	3.86	3.50 - 3.99	260	3.70
Sausage	2.39 - 3.99	1,170	3.42	3.69	10	3.69	2.86 - 3.68	510	3.48
85% lean	2.19 - 3.07	200	2.76	2.19 - 2.50	90	2.24	2.33 - 3.00	90	2.57
93% lean	2.84 - 3.69	360	3.28	2.99 - 3.50	110	3.27	2.79 - 3.59	370	3.42
Breast (99-100% lean)	4.79 - 5.38	60	4.86	4.79	20	4.79			
Rolls (frsh/frz 1 lb.)							1.50 - 2.50	10	2.00
Specialty ^{5/}									
Patties	5.49 - 6.99	30	6.62						
93-94% lean	3.49	130	3.49				3.33 - 3.39	30	3.35
Breast	5.00	20	5.00						



(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/}	31.9% of 4,000 sampled outlets			49.6% of 2,900 sampled outlets			49.5% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			2.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,460			Activity Index = 2,540			Activity Index = 720		
	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				1.00	100	1.00			
" - Toms				1.00	100	1.00			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99	350	0.99	0.99	270	0.99	0.99 - 1.78	80	1.07
Split, bone-in									
Fresh	2.99	50	2.99	2.99	50	2.99			
Rotisserie	7.99	110	7.99						
Boneless, whole									
Cutlets				5.45	240	5.45			
Cutlets, thin sliced									
Strips				5.45	240	5.45			
Tenders	3.99	80	3.99	3.99 - 4.79	300	4.64	4.99	120	4.99
Marinated Tenders									
Drumsticks							1.48	20	1.48
Thighs									
Wings									
Necks	0.99	40	0.99						
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.49	20	3.49	3.99 - 4.49	130	4.08	4.49	40	4.49
Sausage	2.79 - 3.52	70	3.05	3.19	110	3.19	3.27	20	3.27
85% lean	2.87 - 3.00	60	2.94				2.50	10	2.50
93% lean	2.78 - 3.08	100	3.02	2.80 - 3.59	610	3.13	2.99 - 3.19	210	3.18
Breast (99-100% lean)	3.99 - 4.63	540	4.05	3.99	390	3.99	3.99	190	3.99
Rolls (frsh/frz 1 lb.)	1.50 - 1.69	20	1.63				2.19	30	2.19
Specialty ^{5/}									
Patties	4.99	20	4.99						
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. May 18, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/18 thru 05/24.

(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		81.7% of 4,400 sampled outlets			72.8% of 6,000 sampled outlets		
Feature Rate ^{1/}	66.5% of 22,500 stores		60.9% of 22,500 stores		75.7% of 19,500 stores		Activity Index = 11,310			Activity Index = 10,490		
Activity Index ^{2/}	41,150		37,900		45,090		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,570	7.98	4,140	8.06	3,920	7.31	6.88 - 9.99	2,680	8.02	6.99 - 8.99	920	8.14
Private Brand	1,360	7.74	3,510	7.42	3,010	7.37	6.99 - 8.99	1,000	7.88	6.99 - 7.99	90	7.90
Category 2												
Processor Brand	3,590	6.05	3,920	5.98	5,380	5.89	4.99 - 6.99	1,100	6.42	4.99 - 6.99	290	5.54
Private Brand	1,940	6.17	4,340	6.69	4,190	6.26	5.69 - 6.99	830	6.05	5.49 - 6.99	740	6.38
Category 3												
Processor Brand	570	4.12	1,180	3.82	880	3.71	3.99 - 4.99	140	4.93			
Private Brand	1,490	4.97	60	3.65	170	4.99	4.98 - 4.99	200	4.99	3.99 - 4.99	1,220	4.97
Turkey Ham												
Processor Brand	160	3.33	270	3.54	330	3.01	3.49 - 4.99	30	4.64			
Private Brand												
Turkey Pastrami												
Processor Brand	250	4.37	370	4.36	320	3.88	3.99 - 4.99	210	4.33			
Private Brand	120	4.99										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,980	7.64	3,610	6.81	2,980	6.72	5.98 - 8.99	390	7.54	6.99 - 8.99	230	8.08
Private Brand	4,680	7.70	2,210	6.62	2,950	6.99	6.99 - 7.99	1,780	7.42	6.99 - 7.99	190	7.69
Category 2												
Processor Brand	340	5.59	260	6.25	100	5.68	4.99	10	4.99	3.28 - 4.99	60	4.32
Private Brand	210	6.82								6.99	130	6.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	6,650	3.18	6,310	3.39	10,220	3.16	2.50 - 3.99	950	3.44	2.66 - 3.50	3,060	3.18
Private Brand	3,010	3.34	350	3.08	760	2.96	2.99 - 3.99	600	3.32	3.33 - 3.69	220	3.52
Turkey 16 oz												
Processor Brand	1,480	5.40	1,190	5.48	1,140	5.03	4.99 - 5.99	170	5.06	5.99	190	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,060	3.17	5,830	3.41	8,100	3.15	2.50 - 3.99	620	3.35	2.78 - 3.50	3,040	3.18
Private Brand	2,690	3.40	350	3.08	640	2.92	2.99 - 3.99	600	3.32	3.33 - 3.69	110	3.54

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. May 18, 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)		
	56.5% of 4,000 sampled outlets			59.7% of 4,000 sampled outlets			51.4% of 2,900 sampled outlets			73.3% of 1,200 sampled outlets		
	Activity Index = 6,030			Activity Index = 6,210			Activity Index = 4,340			Activity Index = 2,770		
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 - 8.58	340	7.59	6.99 - 10.49	330	7.48	7.99 - 9.99	280	8.22	7.49 - 7.98	20	7.72
Private Brand	6.99 - 7.99	190	7.13	6.99 - 7.99	80	7.28						
Category 2												
Processor Brand	4.98 - 6.99	1,270	5.91	4.99 - 5.99	520	5.54	5.99 - 6.99	170	6.02	5.98 - 6.99	240	6.84
Private Brand	4.99 - 6.99	240	6.35	4.99 - 6.98	130	5.42						
Category 3												
Processor Brand	3.95 - 4.58	140	4.05	2.99 - 3.99	50	3.08	2.49 - 2.99	110	2.65	4.99	130	4.99
Private Brand	4.99	70	4.99									
Turkey Ham												
Processor Brand	2.69 - 5.49	40	4.17	2.49	20	2.49	2.49 - 2.59	70	2.53			
Private Brand												
Turkey Pastrami												
Processor Brand	3.99 - 5.49	30	4.77				3.99	10	3.99			
Private Brand					120	4.99						
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.58 - 9.99	470	6.91	4.99 - 8.99	200	6.72	5.99 - 8.99	560	8.22	7.98 - 9.99	130	8.68
Private Brand	6.99 - 9.99	250	7.10	6.99 - 7.99	820	7.90	7.99	1,110	7.99	7.99	530	7.99
Category 2												
Processor Brand	4.98 - 6.99	270	5.89									
Private Brand	5.99 - 6.98	50	6.29	6.98	30	6.98						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.99	1,020	3.09	1.99 - 3.88	820	3.01	2.49 - 3.69	320	3.38	2.50 - 3.50	480	3.12
Private Brand	2.50 - 3.49	260	2.66	2.88 - 3.33	960	3.23	2.88 - 3.69	590	3.64	2.00 - 3.69	380	3.56
Turkey 16 oz												
Processor Brand	4.98 - 5.99	350	5.43	4.88 - 5.00	530	5.02	5.99	240	5.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 3.99	990	3.09	1.99 - 3.88	640	2.99	2.49 - 3.69	290	3.37	2.50 - 3.50	480	3.12
Private Brand	2.88 - 3.49	50	3.28	2.88 - 3.33	960	3.23	2.88 - 3.69	590	3.64	2.00 - 3.69	380	3.56

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)