



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/21 thru 12/27.

Fri. Dec 21, 2012

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

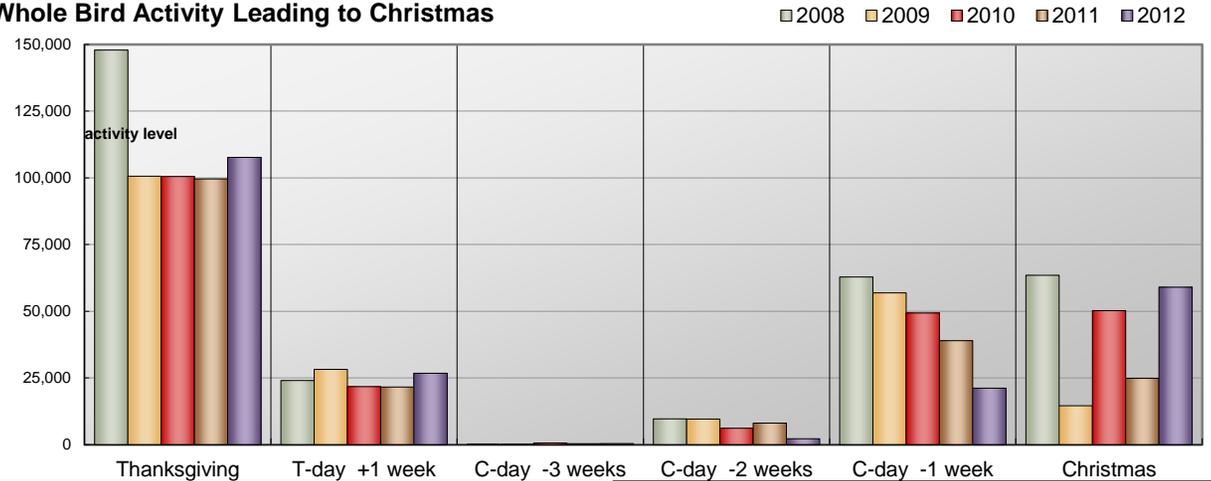
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	84.6% of 22,500 outlets		52.4% of 22,500 outlets		78.4% of 19,500 outlets	
Special Rate ^{4/}	1.4%		0.1%		1.9%	
Activity Index ^{2/}	79,850		38,030		66,540	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	14,670	1.72	2,750	1.83	12,410	1.55
" - Toms	14,870	1.72	2,740	1.83	12,440	1.55
Frozen - Hens	14,930	1.08	7,870	1.03	13,330	1.05
" - Toms	14,540	1.08	7,740	1.03	12,810	1.05
PARTS:						
Breast:						
Bone-in, whole						
Fresh	2,690	2.75	910	2.71	2,220	2.65
Frozen	11,650	1.66	4,450	2.01	9,630	1.80
Split, bone-in						
Fresh					10	1.99
Rotisserie	800	8.56	2,070	7.46	890	8.18
Boneless, whole	70	4.75	30	4.42		
Cutlets	250	5.05	320	5.13	400	4.99
Cutlets, thin sliced						
Strips						
Tenders			70	3.99		
Marinated Tenders	240	4.26	310	4.31	170	4.46
Drumsticks	40	2.17	170	2.01	390	1.81
Thighs	30	2.26	10	2.99	30	2.75
Wings	40	2.17	230	2.25	390	1.82
Necks	10	1.99	50	1.79	90	1.79
Smoked Drumsticks	40	2.06	190	2.12	20	2.59
Smoked Wings	60	1.91	180	2.09	50	2.08
Smoked Necks	40	2.06	170	2.12	30	1.76
GROUND TURKEY:	4,050	3.40	7,480	3.29	840	3.77
Patties	380	3.31	590	3.47		
Sausage	270	3.31	970	3.70	220	3.95
85% lean	230	2.32	1,260	2.51	150	2.77
93% lean	2,420	3.23	3,770	3.16	190	2.84
Breast	750	4.75	890	4.38	280	4.79
Rolls (frsh/frz 1 lb.)	550	2.57	70	2.30	20	1.62
Specialty ^{5/}						
Patties	120	4.94	130	4.63		
93-94% lean	100	4.29	80	3.82	350	4.25
Breast	60	6.32	10	4.99	20	5.49

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

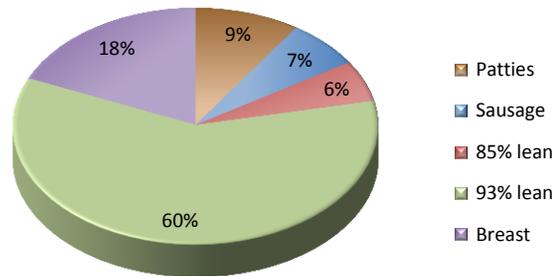
This Week's Turkey Feature Highlights

The holidays are here and turkeys are taking center stage in this weeks circulars. Feature activity on fresh and frozen whole turkey exceeds last year in volume and price; even at higher prices turkey is competitive with alternative proteins. Fresh and frozen bone-in breasts are more actively promoted compared to a year ago; prices are higher on fresh, lower on frozen. Fewer stores are offering rotisserie breasts; prices are higher. Promotional activity on boneless white parts is seasonally light, as expected; mostly ads on cutlets and marinated tenders. Offerings on dark parts are light compared to the previous week and previous year. Ground turkey promotional activity slows; the weighted average price is higher. The 93% lean gets the lion's share of the ground turkey ads; prices are higher. Deli feature activity increases. Service deli offerings slow on both thick and thin slicing meats, increase on deli shaving meats. Stores increase offerings on self-service processor brands at the expense of private brands; prices are lower. Party platters will be popular for holiday parties.

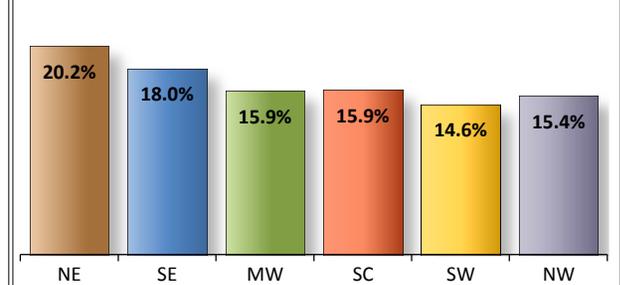
Whole Bird Activity Leading to Christmas



Ground Turkey Featuring by Type



Relative Feature Activity by Region



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/}	89.7% of 4,400 sampled outlets			87.9% of 6,000 sampled outlets			77.9% of 4,000 sampled outlets		
Special Rate ^{4/}	0.1% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 18,450			Activity Index = 22,410			Activity Index = 13,160		
	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	2,670	1.66	1.29 - 1.99	4,610	1.73	1.28 - 2.29	1,830	1.81
" - Toms	1.29 - 1.99	2,870	1.68	1.29 - 1.99	4,610	1.73	1.28 - 2.29	1,830	1.81
Frozen - Hens	0.29 - 1.79	3,570	1.20	0.59 - 1.59	3,470	1.03	0.77 - 1.69	3,120	1.07
" - Toms	0.29 - 1.79	3,600	1.20	0.59 - 1.59	3,310	1.03	0.68 - 1.69	3,140	1.07
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.39 - 3.49	520	3.03	2.49 - 2.99	1,340	2.72	2.49 - 2.99	240	2.76
Frozen	0.99 - 2.29	1,970	1.84	0.98 - 1.99	4,730	1.67	0.99 - 2.29	2,240	1.58
Split, bone-in									
Fresh									
Rotisserie	7.49 - 9.99	310	9.24	7.99	110	7.99	6.99 - 7.99	30	7.45
Boneless, whole	4.29 - 4.99	60	4.88				3.99	10	3.99
Cutlets	4.99 - 5.99	250	5.05						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.26	240	4.26						
Drumsticks	2.99	10	2.99				1.49 - 1.99	20	1.71
Thighs	2.99	10	2.99				1.49	10	1.49
Wings	2.99	10	2.99				1.49 - 1.99	20	1.71
Necks							1.99	10	1.99
Smoked Drumsticks	1.99	20	1.99	2.25	10	2.25	1.99	10	1.99
Smoked Wings	1.99	20	1.99	1.75 - 2.25	30	1.83	1.99	10	1.99
Smoked Necks	1.99	20	1.99	2.25	10	2.25	1.99	10	1.99
GROUND TURKEY:									
Patties	2.99 - 3.99	350	3.33	3.00 - 3.29	30	3.12			
Sausage	2.87 - 3.99	210	3.30	3.50	20	3.50			
85% lean	2.49 - 3.07	120	2.55	2.00	20	2.00	1.99 - 2.50	90	2.08
93% lean	2.66 - 3.84	1,060	3.18	2.99 - 3.19	110	3.11	2.99 - 3.33	220	3.19
Breast (99-100% lean)	4.61 - 5.38	300	4.97				3.89	90	3.89
Rolls (frsh/frz 1 lb.)							1.50 - 2.00	210	1.96
Specialty ^{5/}									
Patties	4.69 - 6.99	120	4.94						
93-94% lean	4.29	100	4.29						
Breast	6.49	40	6.49				5.99	20	5.99



(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/}	80.5% of 4,000 sampled outlets			84.5% of 2,900 sampled outlets			87.0% of 1,200 sampled outlets		
Special Rate ^{4/}	4.1% of stores w/ no-price promotions			3.6% of stores w/ no-price promotions			1.2% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 13,230			Activity Index = 8,770			Activity Index = 3,830		
	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 - 1.79	2,520	1.70	1.39 - 1.99	1,940	1.67	1.49 - 2.29	1,100	1.74
" - Toms	1.29 - 1.79	2,520	1.70	1.39 - 1.99	1,940	1.67	1.49 - 2.29	1,100	1.74
Frozen - Hens	0.79 - 1.09	2,890	1.07	0.67 - 1.59	1,570	0.96	0.69 - 1.58	310	0.97
" - Toms	0.79 - 1.09	2,800	1.07	0.67 - 1.59	1,380	0.98	0.69 - 1.58	310	0.97
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.29 - 3.19	280	2.57	2.59	190	2.59	2.29 - 2.99	120	2.65
Frozen	0.98 - 1.59	1,720	1.63	0.99 - 1.99	740	1.37	0.99 - 2.19	250	1.74
Split, bone-in									
Fresh									
Rotisserie				7.99 - 11.99	310	8.14	8.99	40	8.99
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks	2.29	10	2.29						
Thighs	2.29	10	2.29						
Wings	2.29	10	2.29						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties									
Sausage							3.27	40	3.27
85% lean									
93% lean	2.74 - 3.19	310	3.17	3.19 - 3.75	580	3.40	3.19	140	3.19
Breast (99-100% lean)	4.79 - 4.99	140	4.82				4.38 - 4.79	220	4.74
Rolls (frsh/frz 1 lb.)	1.99	20	1.99	2.99	120	2.99	3.00	200	3.00
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Dec 21, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/21 thru 12/27.

(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		83.6% of 4,400 sampled outlets Activity Index = 11,970			67.2% of 6,000 sampled outlets Activity Index = 13,090		
Feature Rate ^{1/}	65.7% of 22,500 stores		67.1% of 22,500 stores		56.6% of 19,500 stores							
Activity Index ^{2/}	42,850		41,880		30,460							
	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	3,280	8.13	6,700	7.77	3,560	8.13	6.99 - 9.99	2,220	8.46	6.99 - 8.99	550	7.36
Private Brand	2,100	7.69	2,200	7.01	3,670	6.84	6.99 - 7.99	780	7.90	6.99 - 7.49	410	7.26
Category 2												
Processor Brand	3,310	6.13	4,030	5.87	4,710	6.29	4.99 - 6.69	380	5.93	5.49 - 6.99	1,080	6.16
Private Brand	1,870	6.22	1,960	5.81	3,470	6.68	4.99 - 6.99	680	6.34	5.99 - 6.99	130	6.53
Category 3												
Processor Brand	1,390	4.41	420	3.73	260	3.73	3.77 - 5.99	500	4.62	4.88	120	4.88
Private Brand	1,370	4.97	140	5.45	110	4.80	4.48 - 4.99	160	4.85	4.99	1,190	4.99
Turkey Ham												
Processor Brand	570	4.88	380	4.30	280	3.67	3.49 - 3.99	60	3.64	3.49	20	3.49
Private Brand												
Turkey Pastrami												
Processor Brand	230	3.12	260	3.64	430	3.92	3.99	30	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,000	7.56	3,130	7.40	2,070	7.23	5.99 - 8.99	730	8.39	5.99 - 8.99	380	7.02
Private Brand	450	7.93	1,400	7.00	2,230	7.33						
Category 2												
Processor Brand	80	4.99	430	5.31	260	6.67	4.99	20	4.99	4.99	30	4.99
Private Brand	1,690	5.13	170	5.99			4.99	360	4.99	4.99	1,180	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	11,030	3.20	8,400	3.32	3,460	3.23	2.50 - 3.99	2,930	3.20	2.25 - 3.99	4,040	3.19
Private Brand	980	2.79	1,510	3.17	490	3.45						
Turkey 16 oz												
Processor Brand	600	4.98	1,120	5.80	1,790	4.94	4.99	190	4.99			
Private Brand	270	6.60										
Chicken 7-10 oz												
Processor Brand	10,650	3.20	8,120	3.32	3,180	3.26	2.50 - 3.99	2,930	3.20	2.25 - 3.99	3,960	3.21
Private Brand	980	2.79	1,510	3.17	490	3.45						

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)		
	65.2% of 4,000 sampled outlets			51.7% of 4,000 sampled outlets			60.3% of 2,900 sampled outlets			55.5% of 1,200 sampled outlets		
	Activity Index = 6,840			Activity Index = 5,390			Activity Index = 4,050			Activity Index = 1,510		
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	6.98 - 9.99	140	7.45	6.99 - 8.29	310	7.67	7.99	10	7.99	6.99	50	6.99
Private Brand	6.99 - 8.99	180	7.74	6.99 - 7.99	420	7.55	7.49 - 7.99	290	7.92	7.49	20	7.49
Category 2												
Processor Brand	4.98 - 6.99	1,120	6.16	4.99 - 6.99	520	5.79	6.99	170	6.99	6.99	40	6.99
Private Brand	4.99 - 6.99	500	6.36	4.99 - 6.99	560	5.89						
Category 3												
Processor Brand	2.99 - 4.79	320	3.59	3.99	10	3.99	3.29	40	3.29	4.79	400	4.79
Private Brand	3.98 - 4.99	20	4.49									
Turkey Ham												
Processor Brand	3.98	10	3.98	2.49	20	2.49	2.59 - 5.99	460	5.22			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99	200	2.99									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.99	690	6.99	6.98 - 8.49	190	7.66	6.49	10	6.49			
Private Brand	9.99	10	9.99	6.99 - 7.99	190	7.74	7.99	250	7.99			
Category 2												
Processor Brand	4.98 - 4.99	30	4.99									
Private Brand	4.99 - 5.99	50	5.77	6.99	100	6.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,160	2.98	2.19 - 3.00	1,330	3.05	3.50 - 3.99	1,170	3.58	2.19 - 3.50	400	3.31
Private Brand	2.50 - 2.69	610	2.66	3.00	120	3.00	3.00	250	3.00			
Turkey 16 oz												
Processor Brand	4.98 - 4.99	30	4.99	4.88 - 4.99	210	4.96	4.99	170	4.99			
Private Brand	5.49	70	5.49							6.99	200	6.99
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,090	3.01	2.19 - 3.19	1,290	3.05	3.50 - 3.99	980	3.59	2.19 - 3.50	400	3.31
Private Brand	2.50 - 2.69	610	2.66	3.00	120	3.00	3.00	250	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)