# USDA Weekly Retail Turkey Feature Activity

Fri. Jul 20, 2012

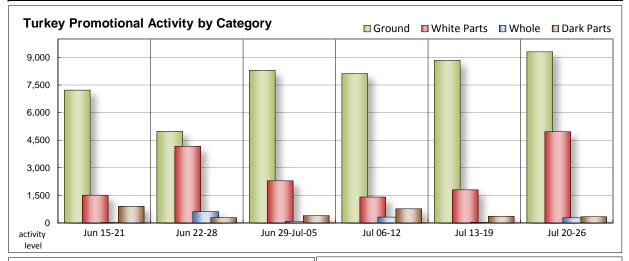
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/20 thru 07/26.

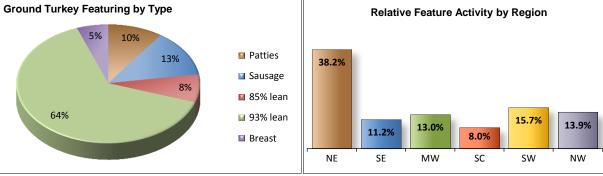
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY										
	1	WEEK	Г	WEEK	LAST	YEAR				
1/		of 22,500		of 22,500	55.9% of 19,500 outlets 4.4%					
Feature Rate 1/		tlets		tlets						
Special Rate 4/	3.	0%	2.	.5%						
Activity Index 2/	16	,910	12	,000	20,400					
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg				
WHOLE BIRDS:										
Fresh - Hens	70	1.76	10	1.59	10	1.49				
" - Toms	10	1.59			10	1.49				
Frozen - Hens	100		10	0.99	1,160	0.99				
" - Toms	100	1.00	10	0.99	1,160	0.99				
PARTS:										
Breast:										
Bone-in, whole										
Fresh	20		10		20					
Frozen	2,240	1.17	840	1.61	1,510	1.51				
Split, bone-in										
Fresh	160		10							
Rotisserie	350		330	7.59	690					
Boneless, whole	630				630					
Cutlets	940		230	4.91	1,880	4.69				
Cutlets, thin sliced	10	4.99	90	4.99	130	3.98				
Strips					160	4.99				
Tenders	610	4.03	290	4.85	1,020	4.13				
Marinated Tenders	620	4.11	570	3.89	610	4.05				
Drumsticks	150	1.87	100	1.98	30	1.47				
Thighs	110	1.85	40	2.39	10	2.29				
Wings	50	1.50	30	1.66	40	1.42				
Necks	10	1.29	40	1.18	20	1.44				
Smoked Drumsticks	10	2.49	30	1.78	130	2.39				
Smoked Wings	10	2.10	70	1.79	130	2.39				
Smoked Necks			50	1.86	130					
GROUND TURKEY:	9,300		8,830		10,550					
Patties	910		530		710					
Sausage	1,190		1,820		1,020					
85% lean	710		2,160		2,140					
93% lean	5,970		2,430		4,270					
Breast	520		1,890		2,410					
Rolls (frsh/frz 1 lb.)	40	1.74	210	2.27	310	1.37				
Specialty 5/										
Patties	300		20		4	0.46				
93-94% lean	560				140	3.49				
Breast	510				htad ave					
Note: rolls & specialty no	n included	ı ın ground	turkey tota	ai and weigi	meu avera	iye.				

# This Week's Turkey Feature Highlights

Retail feature activity increases on turkey and deli items heading into the end of the month. This will be a good week to fire up the grill; there are plenty of turkey items in this week's circulars to choose from. A few more stores offer fresh and frozen whole turkeys but the real action is on frozen bone-in breasts; feature activity is up and prices are sharply lower, making this a good time to stock up. Rotisserie breast feature activity is up and prices are higher. A wider selection of boneless white parts is shown in this week's circulars and prices are lower on most boneless white parts. Featuring is more active on fresh dark parts, less active on smoked dark parts. Ground turkey feature activity is up with 93% lean increasing share against the other grinds; prices decrease on most items. Specialty grinds activity is up, providing even more choices for consumers. Deli activity is up on service deli and self-service deli. Stores increase offerings on service deli private brands and on low cost shaving meats. Self-service deli offerings increase on 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 <u>any</u> 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)

	NORTH	IEAST U.S.		SOU	THEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  38.0% of 4,000 sampled outlets  4.9% of stores w/ no-price promotions  Activity Index = 2,310			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,I	RI,VT)	(AL,FL,GA,N	NS,NC,SC,TN,VA,V	VV)				
Feature Rate 1/	74.3% of 4.40	0 sampled outle	ts	42.6% of 6.	000 sampled outle	ets				
Special Rate 4/	4.0% of stores w	•		1	w/ no-price promo					
Activity Index <sup>2/</sup>		Index = 7,460			y Index = 2,970					
Activity index	Price Range	Summar	Price Range				Price Range Summary			
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	1.79	60	1.79							
" - Toms										
Frozen - Hens							0.99	10	0.99	
" - Toms							0.99	10	0.99	
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	0.99 - 1.97	460	1.30	0.99 - 1.97	590	1.34	0.99 - 1.99	450	1.04	
Split, bone-in										
Fresh	2.99	160	2.99							
Rotisserie	6.89 - 8.99	230	7.82	7.99	110	7.99	7.99	10	7.99	
Boneless, whole	3.99 - 4.99	560	4.07	3.99	70	3.99				
Cutlets	3.99 - 5.49	860	4.42	3.99 - 5.49	80	4.32				
Cutlets, thin sliced	4.99	10	4.99							
Strips										
Tenders	3.99 - 5.49	530	4.02	3.99	70	3.99				
Marinated Tenders	3.73 - 5.30	580	4.13				3.73 - 4.66	40	3.91	
Drumsticks	1.99	120	1.99				1.19 - 1.98	20	1.48	
Thighs	2.29	10	2.29				1.79 - 1.98	100	1.80	
Wings	1.99	20	1.99				0.99 - 1.29	20	1.16	
Necks							1.29	10	1.29	
Smoked Drumsticks	2.49	10	2.49							
Smoked Wings	1.48 - 2.49	10	2.10							
Smoked Necks										
GROUND TURKEY:										
Patties	2.99 - 3.99	690	3.45				2.90 - 3.99	120	3.27	
Sausage	2.39 - 4.12	700	3.14	3.50	10	3.50	2.49 - 3.50	160	3.29	
85% lean	1.99 - 2.33	30	2.10	1.63 - 2.79	420	2.02	2.00 - 3.19	150	2.87	
93% lean	2.53 - 4.99	1,310	3.14	2.89 - 3.07	1,600	2.97	2.60 - 3.20	580	2.94	
Breast (99-100% lean)	5.38	10	5.38				3.99 - 4.99	360	4.51	
Rolls (frsh/frz 1 lb.)	2.00	10	2.00	1.50 - 1.79	20	1.65	1.67	10	1.67	
Specialty <sup>5/</sup>										
Patties	3.49 - 5.99	290	4.04							
93-94% lean	3.99 - 4.99	410	4.28				4.29 - 4.69	140	4.64	
Breast	4.99 - 7.49	390	6.10				7.49	120	7.49	





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

	SOUTH C	ENTRAL U.S.		SOU	THWEST U.S.		NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  50.2% of 1,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 740			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	(,UT)		CA,HI,NV)					
Feature Rate 1/	25.6% of 4,00	0 sampled outle	ts	53.0% of 2,	900 sampled outl	ets				
Special Rate 4/	1.7% of stores w	/ no-price promo	tions		w/ no-price prom					
Activity Index 2/		Index = 1,410			y Index = 2,020					
Tioning mack	Price Range Summary			Price Range Summary			Price Range Summary			
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens							1.59	10	1.59	
" - Toms							1.59	10	1.59	
Frozen - Hens				1.00	90	1.00				
" - Toms				1.00	90	1.00				
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.49 - 2.69	20	2.56	
Frozen	0.99 - 1.89	380	1.04	0.99	270	0.99	0.99 - 1.99	90	1.18	
Split, bone-in										
Fresh										
Rotisserie										
Boneless, whole										
Cutlets										
Cutlets, thin sliced										
Strips										
Tenders	4.59	10	4.59							
Marinated Tenders	4.59	10	4.59							
Drumsticks	1.19	10	1.19							
Thighs	1.19	10	1.19							
	4.40	40	4.40							
Wings	1.19	10	1.19							
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks GROUND TURKEY:										
Patties	3.29 - 3.50	70	3.36	3.50	20	3.50	3.29	10	3.29	
	3.29 - 3.50	60	3.36	3.50	240	3.50	3.29	20	3.29	
Sausage 85% lean	1.66 - 2.08	70	2.02	3.27	240	3.21	2.39	40	2.39	
93% lean				2.40 2.50	1 200	2 02				
	2.78 - 3.19 4.00	780 20	3.05	2.40 - 3.59	1,300	3.03	2.89 - 3.19 4.12	400	3.14 4.12	
Breast (99-100% lean)	4.00	20	4.00				4.12	130	4.12	
Rolls (frsh/frz 1 lb.)  Specialty <sup>5/</sup>										
Patties				4.00	10	4.00				
				4.99	10	4.99	4.00	10	4.00	
93-94% lean Breast							4.29	10	4.29	
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### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jul 20, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/20 thru 07/26.

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

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		C,SC,TN,VA,W	/V)	
Feature Rate <sup>1/</sup>	66.6% o	f 22,500	73.4% o	f 22,500	81.7% o	f 19,500	7					
Feature Rate	sto	res	sto	res	sto	res	84.6% of 4,400 sa	ampled outlets	55.2% of 6,000 sampled outlets			
Activity Index 2/	46	040	44	340	47	270	Activity Inde	x = 17,530	Activity Index = 8,540			
Activity index 21	40,	040			41,	210	Price Range	Summary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1							.					
Processor Brand	4,550	8.11	6,750	7.86	4,700	7.95		1,940 8.12	6.99 - 9.99	570	8.55	
Private Brand	3,680	7.37	3,470	7.21	2,150	7.65	6.99 - 8.99	2,990 7.29	6.99	40	6.99	
Category 2 Processor Brand	4.740	6.43	4,890	6.11	4.520	5.94	4.98 - 9.49	1,200 6.86	4.99 - 6.99	700	6.38	
Private Brand	3,830	6.36	3,430	6.60	4,520 4,420	6.66		2,620 6.53	4.99 - 6.99 4.99	10	4.99	
Category 3	3,030	0.30	3,430	6.60	4,420	0.00	4.77 - 7.99	2,020 0.55	4.99	10	4.99	
Processor Brand	1,870	4.05	1,510	4.41	2,230	3.91	2.88 - 5.99	400 4.97	2.88 - 3.99	350	3.87	
Private Brand	2,690	5.19	310	4.47	2,340	4.90		180 4.80	4.99	1,190	4.99	
Turkey Ham	2,000	5.15	310	7.77	2,540	4.50	3.33 - 4.33	100 4.00	4.55	1,130	4.55	
Processor Brand	490	3.50	180	3.30	300	3.17	3.49 - 4.49	240 4.32	1.99	30	1.99	
Private Brand	110	3.99		0.00	000	0	3.98 - 3.99	110 3.99				
Turkey Pastrami												
Processor Brand	350	3.85	280	4.04	410	3.74	3.49 - 4.99	290 3.79				
Private Brand			120	4.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,020	7.32	2,820	7.73	4,410	7.34	5.99 - 8.99	980 7.54	4.99 - 8.99	990	7.19	
Private Brand	790	7.02	920	6.69	940	7.14		760 6.99				
Category 2												
Processor Brand	360	5.70	430	5.23	590	4.99	5.98 - 5.99	40 5.99				
Private Brand	260	5.15	420	4.63	280	5.99	<b>5</b>					
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,260	3.20	8,270	2.94	8,260	3.32	2.48 - 3.99	2,380 3.39	2.29 - 3.99	1,850	3.02	
Private Brand	1,890	3.03	1,230	3.12	1,700	2.63	2.99 - 3.00	360 2.99	2.99 - 3.00	520	3.00	
Turkey 16 oz												
Processor Brand	1,920	5.05	840	5.26	1,450	5.42	3.99 - 6.99	670 4.79	2.29 - 5.49	60	4.98	
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,340	3.14	7,340	2.90	,	3.35		2,010 3.28	2.29 - 3.99	1,710	3.01	
Private Brand	1,890	3.03	1,130	3.09	1,690	2.63	2.99 - 3.00	360 2.99	2.99 - 3.00	520	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)





### **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 07/20 thru 07/26.

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

		EST U.S.		ENTRAL U.S.		VEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)  75.2% of 1,200 sampled outlets Activity Index = 1,150		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,I	HI,NV)			
Feature Rate 1/	72.8% of 4,000	0 sampled outlets	56.6% of 4,000	sampled outlets	64.2% of 2,900	sampled outlets			
Activity Index 2/	Activity I	ndex = 9,980	Activity I	ndex = 4,580	Activity In	dex = 4,260			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range	Summary	
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	
SERVICE DELI - Turkey									
Category 1									
Processor Brand	5.99 - 8.99	770 7.52	5.98 - 10.49	670 7.74	7.99 - 9.99	390 9.31	7.99 - 8.49	210 8.01	
Private Brand	6.79 - 9.99	310 8.61	5.99 - 8.49	210 6.71			7.49	130 7.49	
Category 2	4.00	4 400 0 40	4.50	040 500	400 700	100 000	4.00		
Processor Brand	4.99 - 6.99	1,480 6.42	4.59 - 6.99	810 5.63	4.99 - 7.99	460 6.92	4.99 - 6.99	90 5.71	
Private Brand	4.99 - 6.49	690 5.39	5.00 - 6.99	150 6.23	6.99	280 6.99	6.99 - 7.49	80 7.40	
Category 3  Processor Brand	2.98 - 4.99	870 3.94	2.99 - 4.00	120 3.13	2.49 - 4.49	100 3.05	3.98 - 4.99	30 4.21	
Private Brand	4.99 - 5.99	90 5.88	4.99 - 5.99	360 5.30	4.99 - 5.99	550 5.50	4.99 - 5.49	320 5.30	
Turkey Ham	4.99 - 5.99	90 5.66	4.99 - 5.99	300 5.30	4.99 - 5.99	330 3.30	4.99 - 5.49	320 5.30	
Processor Brand	2.99 - 3.98	20 3.28	2.00 - 2.99	30 2.40	1.99 - 3.99	170 2.83			
Private Brand	2.00 0.00	20 0.20	2.00 2.00	2.10	1.00 0.00	170 2.00			
Turkey Pastrami									
Processor Brand	3.98	20 3.98	3.97 - 4.98	40 4.22					
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.49 - 8.78	990 7.15	5.99 - 8.99	40 8.04	6.99	10 6.99	12.99	10 12.99	
Private Brand	6.99	10 6.99	7.99	20 7.99					
Category 2									
Processor Brand	4.98 - 6.99	140 6.54	4.99	10 4.99	4.99	170 4.99			
Private Brand	3.99 - 5.98	190 5.06	5.00 - 5.98	70 5.40					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	2.00 - 3.99	1,410 3.11	1.49 - 2.99	770 2.90	2.50 - 3.99	810 3.58	2.50	40 2.50	
Private Brand	2.88 - 3.49	600 2.98	3.00 - 3.69	280 3.29	2.99	130 2.99			
Turkey 16 oz Processor Brand	3.40 5.60	420 5.00	3.00 5.00	160 5 24	4.00	440 400	E 70	200 5.70	
Processor Brand Private Brand	3.49 - 5.69	420 5.06	3.99 - 5.99	160 5.34	4.99	410 4.99	5.79	200 5.79	
Chicken 7-10 oz									
Processor Brand	2.00 - 3.99	1,370 3.10	1.88 - 3.50	560 2.88	2.50 - 3.69	650 3.37	2.50	40 2.50	
Private Brand	2.88 - 3.49	600 2.98	3.00 - 3.69	280 3.29	2.50 - 3.09	130 2.99	2.00	70 2.30	
1 TIVALO DIANA	2.00 0.40	2.30	0.00 0.00	200 0.20	2.00	100 2.00			

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)