

USDA Weekly Retail Turkey Feature Activity

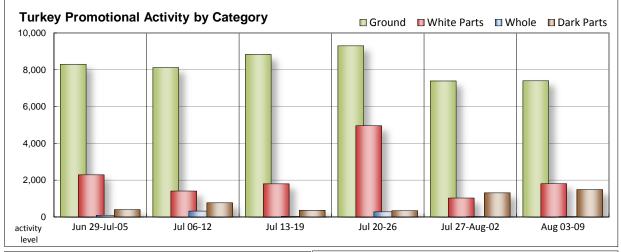
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/03 thru 08/09.

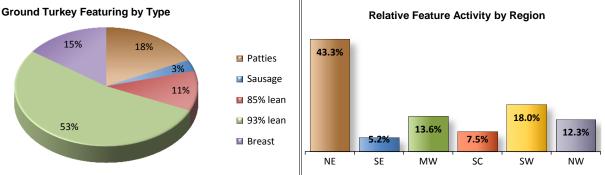
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST	YEAR						
Feature Rate 1/	30.6%	of 22,500	32.4%	of 22,500	42.8% of 19,500 outlets 7.9%							
i catule Nate	ou	tlets	ou	tlets								
Special Rate 4/	0.	0%		.4%								
Activity Index 2/		,890	11	,220	12,970							
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens			10									
" - Toms			10	1.48								
Frozen - Hens	20	0.99										
" - Toms					50	1.79						
PARTS:												
Breast:												
Bone-in, whole												
Fresh	60		40		10	-						
Frozen	520	1.78	310	1.79	380	1.56						
Split, bone-in												
Fresh			50		10							
Rotisserie	210		10	8.99	360	8.48						
Boneless, whole	210											
Cutlets	500	5.25	310	4.36	1,100	4.86						
Cutlets, thin sliced			10	5.99	10	4.99						
Strips	20	3.99	100	4.99								
Tenders	290	4.02	200	3.99	310	4.76						
Marinated Tenders	520	4.44	1,030	4.32	400	3.89						
Drumsticks	310	1.91	420	1.87	330	1.54						
Thighs	250	1.97	170	1.99	90	2.29						
Wings	380	1.92	350	1.86	230	1.57						
Necks	250	1.91	160	1.74	70	1.92						
Smoked Drumsticks	100	2.01	40	1.99	10	1.98						
Smoked Wings	100	1.96	110	1.80	80	2.34						
Smoked Necks	100	1.75	60	1.99	20	1.49						
GROUND TURKEY:	7,400	3.32	7,390	3.68	9,110	3.23						
Patties	1,310	3.14	500		540	3.02						
Sausage	230	3.16	1,040	3.54	2,200	3.04						
85% lean	810	2.32	620	2.40	1,940	2.37						
93% lean	3,940	3.15	2,130	3.10	2,430	3.05						
Breast	1,110	4.83	3,100	4.50	2,000	4.54						
Rolls (frsh/frz 1 lb.)	200	1.83	270	1.90	320	1.37						
Specialty 5/												
Patties	150		60									
93-94% lean	260	_			140	3.49						
Breast	40											
Note: rolls & specialty no	ot included	l in ground	turkey tot	al and weig	hted avera	age.						

This Week's Turkey Feature Highlights

Retail activity increases for the first of the month. Retailers show limited interest in featuring whole turkeys, it is just too hot. Offerings increase on bone-in breasts, especially frozen at slightly lower prices. More stores are putting rotisserie breasts in their circulars; prices are sharply lower and may tempt shoppers who want to avoid cooking in this heat. Offerings increase on cutlets and tenders, decrease on marinated tenders, but they will all cost more this week. Activity increases on dark parts; prices are higher on everything except smoked necks. Ground turkey is advertised at close to last week's activity level, but the weighted average price is sharply lower. This is due to fewer ads promoting ground breast and sausage. Deli activity increases. Offerings increase on service deli thick slicing and thin slicing turkey; decrease on chicken. Self-service deli feature activity increases on processor brands, declines on private brands. We are heading into the end of summer; last chance for vacations and time to start thinking about school supplies. Consumers will really have to stretch those dollars.





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.



Fri. Aug 03, 2012

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/03 thru 08/09.

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

	NORTI	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 30.1% of 4,000 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,730 Price Range Summary			
	(CT,DE,MA,MD,N	IE.NH.NJ.NY.PA.I	RI.VT)	(AL.FL.GA.M	S,NC,SC,TN,VA,W	/V)				
Feature Rate 1/	, , , , , , ,	0 sampled outle	,	(, , , , ,	00 sampled outlet	,				
Special Rate 4/	0.0% of stores w	•		· ·	v/ no-price promo					
Activity Index ^{2/}		Index = 6,070			Index = 1,000					
Activity illuex	Price Range	Summar	"V	Price Range	Summar	TV				
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens							0.99	20	0.99	
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.99	40	2.99	2.99	20	2.99				
Frozen	1.97	10	1.97	1.19 - 1.97	200	1.94	1.39 - 1.99	180	1.61	
Split, bone-in										
Fresh										
Rotisserie	5.99 - 7.99	190	6.72	7.99	20	7.99				
Boneless, whole	4.99	10	4.99				5.59	180	5.59	
Cutlets	4.00 - 5.99	460	5.29	5.49	20	5.49				
Cutlets, thin sliced										
Strips										
Tenders	4.99	10	4.99				3.99	60	3.99	
Marinated Tenders	4.26 - 4.79	250	4.45	4.26	40	4.26	3.33 - 4.66	210	4.51	
Drumsticks	1.89 - 1.99	180	1.96	1.69	50	1.69	1.50	10	1.50	
Thighs	1.89	60	1.89							
Wings	1.99	120	1.99	1.39 - 1.69	60	1.64	1.50	10	1.50	
Necks				1.69	50	1.69	1.50	10	1.50	
Smoked Drumsticks	1.79 - 2.49	60	1.89	2.19	40	2.19				
Smoked Wings	1.69 - 2.49	60	1.81	2.19	40	2.19				
Smoked Necks	1.48 - 1.59	50	1.58	1.89 - 1.99	50	1.91				
GROUND TURKEY:										
Patties	2.99 - 3.79	800	3.05	3.00	110	3.00	3.00 - 3.99	320	3.21	
Sausage	2.79 - 3.49	80	3.25				2.87 - 3.79	60	3.16	
85% lean	1.99 - 3.19	500	2.21	2.33 - 3.19	60	2.91	1.99 - 3.19	210	2.41	
93% lean	2.68 - 3.84	1,930	3.17	2.99 - 3.29	180	3.08	2.80 - 3.23	320	3.00	
Breast (99-100% lean)	4.61 - 5.39	860	4.86	3.99 - 4.61	50	4.48	3.33	10	3.33	
Rolls (frsh/frz 1 lb.)							1.67	100	1.67	
Specialty ^{5/}			_							
Patties	2.99 - 3.49	150	3.42							
93-94% lean	3.99 - 5.99	230	4.48	F 40	40	F 40	4.29	20	4.29	
Breast	5.49	20	5.49	5.49	10	5.49	5.49	10	5.49	



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		ENTRAL U.S.				HWEST U.S.			NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	,UT)		(C	CA,HI,NV)		(AK,ID,MT,OR,WA,WY) 33.1% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions				
Feature Rate 1/	19.4% of 4,00	0 sampled outlet	s	:	29.8% of 2,9	00 sampled ou	tlets					
Special Rate 4/	0.0% of stores w	no-price promo	tions	0.0%	of stores v	v/ no-price pro	motions					
Activity Index 2/	Activity	Index = 960	Activity Index = 1,660				Activity Index = 470					
·	Price Range	Summary		Price	Price Range		Summary		nge	Summ	nary	
	(\$/pound)	Stores V	Vtd Avg	(\$/p	ound)	Stores	Wtd Avg	(\$/poun	d)	Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.59 - 1.89	100	1.75					1.79 - 1	.98	30	1.91	
Split, bone-in												
Fresh												
Rotisserie												
Boneless, whole	3.49	20	3.49									
Cutlets	3.99	20	3.99									
Cutlets, thin sliced												
Strips	3.99	20	3.99									
Tenders	3.99	20	3.99		3.99	200	3.99					
Marinated Tenders	3.99	20	3.99									
Drumsticks					1.99	70	1.99					
Thighs					1.99	190	1.99					
Wings					1.99	190	1.99					
Necks					1.99	190	1.99					
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties				3.50	- 3.99	80	3.90					
Sausage	2.79 - 3.49	30	3.15		2.87	20	2.87	2.79 - 3	.27	40	3.12	
85% lean	2.08	10	2.08					2	.39	30	2.39	
93% lean	2.79 - 3.49	510	3.16	2.80	- 3.19	640	3.18	2.79 - 3	.19	360	3.17	
Breast (99-100% lean)	3.99 - 4.99	150	4.81	4.99	- 5.19	40	5.15					
Rolls (frsh/frz 1 lb.)	1.50 - 1.69	60	1.66		2.50	40	2.50					
Specialty ^{5/}												
Patties												
93-94% lean								4	.29	10	4.29	
Breast												



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 03, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/03 thru 08/09.

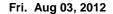
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ			NORTHEAST U.S.		SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	78.0% o	f 22,500	77.8% o	f 22,500	83.9% c	f 19,500					
Feature Rate 1/	sto	res	sto	res	sto	res	94.0% of 4,400 s	ampled outlets	84.5% of 6,000 sampled outlets		
Activity Index 2/	46	820	45,	700	46	440	Activity Inde	ex = 14,060	Activity Index = 11,300		
Activity Index 2/	40,	020	45,	700	46,	410	Price Range	Summary	Price Range	Price Range Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Av	vg
SERVICE DELI - Turkey											
Category 1											
Processor Brand	6,210	8.24	5,540	7.92	,	8.03		1,680 8.53	6.98 - 8.99	,	.10
Private Brand	2,900	7.24	1,860	7.83	2,500	8.19	6.99 - 8.99	2,150 7.23	6.99	430 6.	.99
Category 2	5.070	0.05	F 000	0.05	5.540	0.44	100 000	0.000	4.00	470 5	00
Processor Brand	5,970	6.05	5,280	6.05	5,510	6.14 6.40		2,300 6.38	4.99 - 6.99		.66
Private Brand Category 3	2,530	6.47	1,380	6.46	2,930	6.40	5.97 - 5.99	130 5.99	6.99	1,350 6.	.99
Processor Brand	570	4.00	830	3.86	1,270	3.97	2.99 - 4.99	220 4.19	3.49 - 4.99	200 4.	.13
Private Brand	60	3.93	40	4.98	30	3.99		60 3.93	3.49 - 4.99	200 4.	.13
Turkey Ham	00	3.33	40	4.30	30	3.33	3.77 - 3.96	00 3.93			
Processor Brand	530	3.29	380	3.50	550	3.21	2.99 - 4.99	210 3.81	3.69 - 4.99	50 4.	.16
Private Brand		0.20		0.00	000	0.2.		2.0	0.00		
Turkey Pastrami											
Processor Brand	340	4.21	350	3.97	250	4.04	3.49 - 4.99	210 4.46	4.99	20 4.	.99
Private Brand			120	4.99							
SERVICE DELI - Chicken											
Category 1											
Processor Brand	2,990	6.93	3,120	7.62	1,840	7.36	5.77 - 9.99	1,860 6.96	6.49 - 6.99	180 6.	.95
Private Brand	3,050	6.85	3,070	7.39	-	6.79		1,530 7.10	6.99		.99
Category 2	•		,		,			,			
Processor Brand	220	5.15	120	4.16	1,370	6.32	4.99	50 4.99			
Private Brand			410	6.56	190	5.98	s				
SELF-SERVICE DELI											
(dollars per tub or pouch)											
Turkey 7-10 oz											
Processor Brand	9,800	2.97	7,460	2.90	,	3.01		1,480 2.99	2.49 - 3.69	,	.04
Private Brand	940	2.96	4,030	2.75	2,690	3.27	2.50 - 3.00	370 2.78	2.50 - 3.59	160 3.	.28
Turkey 16 oz											
Processor Brand	650	6.21	670	5.42	630	6.27]				
Private Brand	160	5.49									
Chicken 7-10 oz	0.005	0.65	7040	0.65	7045	0.5-	.	4.440	0.50	0.040	
Processor Brand	8,960	2.98	7,040	2.90	,	3.07		1,440 2.99	2.50 - 3.69	,	.04
Private Brand	940	2.96	4,000	2.75	2,640	3.27	2.50 - 3.00	370 2.78	2.50 - 3.59	160 3.	.28

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 08/03 thru 08/09.

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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,F	H,NV)			
Feature Rate 1/			22 =2/ (4 22		50.00/ / 0.000		59.3% of 1,200 sampled outlets		
) sampled outlets	·	0 sampled outlets	·	sampled outlets			
Activity Index 2/	Activity Index = 9,170 Price Range Summary (\$/pound) Stores Wtd Avg			Summary		dex = 3,650	Activity Index = 2,250 Price Range Summary		
			Price Range	(\$/pound) Stores Wtd Avg		Price Range Summary (\$/pound) Stores Wtd Avg		Stores Wtd Avg	
SERVICE DELI - Turkey	(ψ/ροαπα)	Stoles Wid Avg	(ψ/ροαπα)	Stores With Avg	(ψ/ροαπα)	Stores With Avg	(\$/pound)	Stoles Wid Avg	
Category 1									
Processor Brand	5.99 - 10.49	670 7.09	4.99 - 7.99	1,030 8.08	7.99 - 11.99	490 9.33	7.98 - 12.99	320 8.78	
Private Brand	6.99 - 7.99	60 7.28	4.48 - 7.99	140 6.67	8.99	120 8.99			
Category 2									
Processor Brand	4.49 - 6.99	2,090 5.72	4.99 - 5.99	700 6.16	5.99	330 5.99	5.98 - 7.99	80 6.87	
Private Brand	5.49 - 6.99	500 6.20	6.99	150 6.99			4.99	400 4.99	
Category 3									
Processor Brand	3.48 - 4.49	70 3.85	3.49	50 3.49			2.99	30 2.99	
Private Brand									
Turkey Ham									
Processor Brand	2.99 - 5.49	40 4.10	1.99	110 1.99	1.99 - 3.99	120 2.94			
Private Brand									
Turkey Pastrami									
Processor Brand	2.99 - 5.49	40 4.10	4.99	10 4.99	2.49	40 2.49	3.98	20 3.98	
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	4.98 - 7.98	500 6.46	6.99 - 8.79	370 7.33	6.99 - 8.49	70 7.30	7.98	10 7.98	
Private Brand	5.49 - 9.99	310 6.12	4.48 - 6.99	590 6.32	6.99	40 6.99	6.99 - 7.49	150 7.44	
Category 2									
Processor Brand	4.49 - 4.99	130 4.96	5.99	40 5.99					
Private Brand									
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	2.29 - 3.99	2,430 2.94	1.99 - 2.50	1,500 2.86	2.50 - 2.99	950 2.91	2.29 - 3.33	520 3.02	
Private Brand	2.99 - 3.49	10 3.28	2.99 - 3.00	230 3.00	2.99	170 2.99			
Turkey 16 oz Processor Brand	5.49 - 5.99	90 5.92	4.77 - 5.99	120 5.57	5.99	240 5.99	6.99	200 6.99	
Processor Brand Private Brand	5.49 - 5.99 5.49	160 5.49	4.77 - 5.99	120 5.57	5.99	240 5.99	6.99	200 6.99	
Chicken 7-10 oz	5.49	100 5.49							
Processor Brand	2.29 - 3.99	2,060 2.92	1.99 - 2.79	1,120 2.94	2.79 - 2.99	910 2.93	2.78 - 3.33	520 3.03	
Private Brand	2.99 - 3.49	10 3.28	2.99 - 3.00	230 3.00	2.79 - 2.99	170 2.99	2.70 - 3.33	320 3.03	
i iivate biand	2.55 5.49	10 5.20	2.55 - 5.00	200 0.00	2.55	170 2.39		1	

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)