

# **USDA Weekly Retail Turkey Feature Activity**

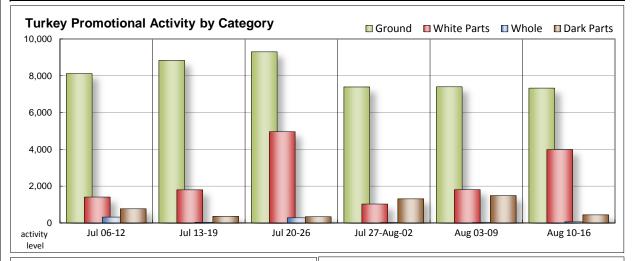
### Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/10 thru 08/16.

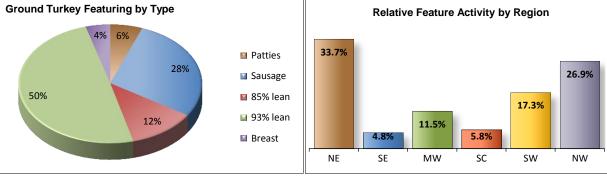
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

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	NAT	IONAL S	UMMA	RY			
	THIS	WEEK	LAST	WEEK	LAST	YEAR	
Feature Rate 1/	40.7%	of 22,500	30.6%	of 22,500	39.8% of 19,500 outlets 5.3%		
realure Rate	ou	tlets	ou	tlets			
Special Rate 4/	0.	1%	0.	.0%			
Activity Index 2/		,040	11	,890	12,170		
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	
WHOLE BIRDS:							
Fresh - Hens	60	1.79					
" - Toms							
Frozen - Hens			20	0.99			
" - Toms					30	1.48	
PARTS:							
Breast:							
Bone-in, whole	00	0.40	00	0.00	70	4.00	
Fresh	30		60		70		
Frozen	60	1.62	520	1.78	350	1.59	
Split, bone-in Fresh					30	2.99	
Rotisserie	1,250	8.26	210	6.84	810		
Boneless, whole	580		210		680		
·							
Cutlets	950		500	5.25	1,150		
Cutlets, thin sliced	100	4.99			20	3.99	
Strips			20				
Tenders	1,020		290	_	730		
Marinated Tenders	610		520		250		
Drumsticks	190	2.02	310		140		
Thighs	4.40	4.04	250	-	40		
Wings	140	_	380		50		
Necks	70	_	250		10		
Smoked Drumsticks	10	-	100		150		
Smoked Wings	10		100		40		
Smoked Necks GROUND TURKEY:	20		100		40 7 070		
Patties	<b>7,330</b> 420		<b>7,400</b> 1,310		<b>7,070</b>		
Sausage	2,080		230		1,230		
85% lean	870		810		1,050		
93% lean	3,640		3,940		2,420		
Breast	320		1,110		1,940		
Rolls (frsh/frz 1 lb.)	280		200		310		
Specialty 5/	200	2.00	200	1.00	010	1.00	
Patties	180	3.77	150	3.42			
93-94% lean	500		260		180	4.49	
Breast	650		40	-	20		
Note: rolls & specialty no							

### This Week's Turkey Feature Highlights

The feature rate and activity rate are both up, meaning more stores are offering multiple turkey items this week. Retailers show little interest in featuring whole turkeys or bone-in breasts. Instead, they are heavily promoting rotisserie breasts, a hot meal without the hot kitchen. Offerings on boneless white parts increase on all items; boneless whole breasts and cutlets are the best deals this week. Cooler weather makes this a good time to throw some boneless cuts on the grill. Fewer stores feature dark parts; prices are higher. Ground turkey offerings slow; the weighted average price declines. The most noticeable changes are a sharp decrease in offerings on patties and ground breast, and a huge increase in feature activity on sausage. More stores feature specialty ground turkey. Feature activity on deli increases, especially on private brands. Service deli promotions are the most active on whole muscle meats; retailers increase chicken's share of this week's ads. Self-service deli feature activity slows; prices are higher on most items.





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 10, 2012

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

	NORTI	HEAST U.S.		SOU <sup>*</sup>	THEAST U.S.		MIDWEST U.S.				
	(CT,DE,MA,MD,M	IE.NH.NJ.NY.PA.I	RI.VT)	(AL.FL.GA.M	IS,NC,SC,TN,VA,V	VV)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  26.1% of 4,000 sampled outlets  0.7% of stores w/ no-price promotions				
Feature Rate 1/	, , , , , ,	0 sampled outle		, , , , ,	000 sampled outle	,					
Special Rate 4/	0.0% of stores w	•		· ·	w/ no-price promo						
Activity Index <sup>2/</sup>		Index = 6,340			y Index = 1,230	01.01.0	Activity Index = 1,960				
Activity illuex	Price Range	Summar	"V	Price Range	Summa	rv	Price Range Summary				
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens	1.79	60	1.79								
" - Toms											
Frozen - Hens											
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh	2.68	10	2.68				2.29	20	2.29		
Frozen	1.49	20	1.49	1.69	10	1.69	1.49 - 1.88	30	1.68		
Split, bone-in											
Fresh											
Rotisserie	6.89 - 8.99	140	7.72	7.99	40	7.99	6.99 - 8.99	110	8.43		
Boneless, whole	3.99	510	3.99	3.99	70	3.99					
Cutlets	3.99 - 5.45	810	4.31	3.99	70	3.99	3.98 - 3.99	40	3.99		
Cutlets, thin sliced	4.99	100	4.99								
Strips											
Tenders	3.99 - 4.39	560	4.02	3.99	70	3.99	3.98 - 4.99	130	4.70		
Marinated Tenders	3.73 - 5.33	550	4.46				3.19 - 4.26	20	3.55		
Drumsticks	1.69 - 2.19	140	1.99	2.19	40	2.19	1.29 - 1.99	10	1.70		
Thighs											
Wings	1.59 - 1.99	130	1.96				1.29 - 1.99	10	1.70		
Necks	2.19	20	2.19	2.19	40	2.19	1.99	10	1.99		
Smoked Drumsticks				2.25	10	2.25					
Smoked Wings				2.25	10	2.25					
Smoked Necks	1.99	20	1.99								
GROUND TURKEY:											
Patties	2.99 - 3.49	190	3.02	2.79 - 3.00	100	2.87	2.50 - 3.50	50	3.00		
Sausage	2.99 - 3.99	1,180	3.46	3.29 - 3.99	210	3.60	2.87 - 3.68	410	3.24		
85% lean	2.83	40	2.83	2.00 - 2.83	180	2.33	2.00 - 2.99	310	2.65		
93% lean	2.75 - 4.99	770	3.64	2.99 - 3.50	300	3.13	2.80 - 3.20	440	3.16		
Breast (99-100% lean)	4.79 - 4.99	30	4.87	3.99	50	3.99	4.07	10	4.07		
Rolls (frsh/frz 1 lb.)	1.88	20	1.88	1.88	30	1.88	1.50 - 2.69	80	2.36		
Specialty <sup>5/</sup>											
Patties	3.49 - 5.99	180	3.77								
93-94% lean	3.99 - 4.99	340	4.27				2.99 - 4.69	160	4.46		
Breast	5.49 - 7.49	520	6.07				7.49	120	7.49		





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	SOUTH C	ENTRAL U.S.			SOUT	HWEST U.S.			NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	,UT)		(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/	16.3% of 4,00	0 sampled outlet	s	54.9% of 2,900 sampled outlets 0.0% of stores w/ no-price promotions				34.5% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions				
Special Rate 4/	0.0% of stores w	/ no-price promo	tions									
Activity Index 2/		Index = 990			Activity Index = 2,140				Activity Index = 1,380			
7.6	Price Range		Summary		Range	Summary		Price R		Sumn	nary	
	(\$/pound)		/ /td Avg		ound)	Stores	Wtd Avg	(\$/pot		Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen												
Split, bone-in												
Fresh												
Rotisserie	8.99	250	8.99	7.99	- 8.99	390	8.68	6.99 -	8.99	320	7.41	
Boneless, whole												
Cutlets	4.69	10	4.69						5.45	20	5.45	
Cutlets, thin sliced												
Strips												
Tenders					4.79	240	4.79		4.79	20	4.79	
Marinated Tenders	3.19	10	3.19						3.99	30	3.99	
Drumsticks		_										
Thighs												
Wings												
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.29	30	3.29		3.50	50	3.50					
Sausage	2.95	30	2.95		2.87	50	2.87		3.27	200	3.27	
85% lean	2.49	50	2.49	2.33	- 2.40	280	2.34		2.63	10	2.63	
93% lean	2.49 - 3.59	470	3.15		- 3.59	930	3.10	3.19 -		730	3.24	
Breast (99-100% lean)	3.99	20	3.99		4.79	170	4.79	4.79 -		40	4.92	
Rolls (frsh/frz 1 lb.)	1.69 - 1.99	120	1.74		3.00	30	3.00					
Specialty 5/												
Patties												
93-94% lean												
Breast									4.69	10	4.69	



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Aug 10, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/10 thru 08/16.

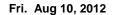
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RΥ			NORTHEAST U.S.		SOUTH	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)					
	74.8% o	f 22,500	78.0% o	f 22,500	72.2% c	of 19,500	, .				73.0% of 6,000 sampled outlets  Activity Index = 7,800			
Feature Rate 1/	sto	res	sto	res	sto	ores	84.3% of 4,400 sampled outlets  Activity Index = 17,380			tlets				
A activities to slave O/	47	400	40	000	40	740								
Activity Index 2/	47,	490	46,	820	43,	740	Pric	e Range	Sumr	mary	Price Range Summary		ary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/	/pound)	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey														
Category 1														
Processor Brand	6,640	8.08		8.24	6,020	8.00	5.99	9.99	2,820	8.36	6.98 - 9.99	1,300	8.38	
Private Brand	4,100	7.81	2,900	7.24	3,630	7.67	6.99	7.99	3,730	7.82	6.99	70	6.99	
Category 2														
Processor Brand	4,160	5.70	5,970	6.05	3,570	6.06		9 - 6.99	1,210	5.84	4.99 - 6.49	1,170	5.52	
Private Brand	2,990	6.17	2,530	6.47	6,070	6.55	4.99	9 - 6.99	1,170	6.62	5.99	1,040	5.99	
Category 3														
Processor Brand		3.79	570	4.00	1,190	3.90	3.97		350	4.09	3.99	50	3.99	
Private Brand	220	4.03	60	3.93	80	4.98		4.98	40	4.98	3.99	20	3.99	
Turkey Ham														
Processor Brand	230	3.11	530	3.29	440	3.07	2.89		140	3.43				
Private Brand	20	3.99			20	3.89		3.99	20	3.99				
Turkey Pastrami														
Processor Brand	200	4.29	340	4.21	200	3.99	3.99	9 - 4.99	110	4.43				
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	3,800	7.66	2,990	6.93	3,880	7.89	5.99	9.99	2,850	7.76	5.49 - 9.79	320	7.78	
Private Brand	3,110	7.23	3,050	6.85	2,550	7.30		6.99	910	6.99	6.99	220	6.99	
Category 2														
Processor Brand	120	4.84	220	5.15	570	5.35	4.99	9 - 5.99	60	5.11	3.29	20	3.29	
Private Brand	510	5.29			210	5.50		4.99	170	4.99				
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	8,220	3.19	9,800	2.97	6,270	3.10	2.50	) - 3.99	1,520	3.32	2.25 - 3.59	1,690	3.25	
Private Brand	1,510	3.14	940	2.96	1,480	3.11	2.48	3 - 3.33	330	3.08	3.00	10	3.00	
Turkey 16 oz														
Processor Brand	1,100	5.32	650	6.21	590	5.02	4.99	9 - 5.99	170	5.92	4.99 - 5.99	220	5.07	
Private Brand			160	5.49								<u> </u>		
Chicken 7-10 oz														
Processor Brand	7,890	3.20	8,960	2.98	5,520	3.13	2.50	3.99	1,450	3.31	2.25 - 3.59	1,660	3.26	
Private Brand	1,510	3.14	940	2.96	1,450	3.11	2.48	3 - 3.33	330	3.08	3.00	10	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 08/10 thru 08/16.

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		EST U.S.		ENTRAL U.S.		WEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
1/	(IA,IL,IIN,KY,IVII,IVI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L/	A,MO,NM,OK,TX,UT)	(CA,	HI,NV)	75.3% of 1,200 sampled outlets  Activity Index = 2,180			
Feature Rate 1/	72.0% of 4,000	) sampled outlets	75.2% of 4,000	) sampled outlets	67.4% of 2,900	sampled outlets				
Activity Index 2/	Activity I	ndex = 8,260	Activity I	ndex = 7,720	Activity In	dex = 4,150				
Activity mack 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	0.00	050 7.70	0.00 40.00	200		200 740	0.00	200 700		
Processor Brand	6.69 - 9.49	650 7.72	6.98 - 10.99	820 8.01	6.99 - 7.99	660 7.40	6.98 - 8.49	390 7.02		
Private Brand	6.99	100 6.99	6.99 - 7.99	80 7.28	8.99	120 8.99				
Category 2  Processor Brand	4.98 - 6.99	490 5.70	4.97 - 6.99	810 5.60	5.99	170 5.99	4.49 - 6.99	310 5.96		
Private Brand	4.98 - 6.29	450 5.50	4.99 - 6.29	330 6.01	5.99	170 5.99	4.49 - 0.99	310 5.96		
Category 3	4.90 - 0.29	450 5.50	4.99 - 0.29	330 0.01						
Processor Brand	2.98 - 4.49	440 3.46	3.49 - 5.00	270 3.93	2.99	30 2.99	3.98 - 4.98	20 4.65		
Private Brand	2.59 - 4.99	100 4.52	2.59	60 2.59	2.00	2.00	0.00 4.00	20 4.00		
Turkey Ham	2.00	100 1.02	2.00	2.00						
Processor Brand	2.95 - 3.98	10 3.47	1.99 - 2.99	70 2.45	2.79 - 2.99	10 2.92				
Private Brand										
Turkey Pastrami										
Processor Brand	3.98	20 3.98	3.98	30 3.98			4.29	40 4.29		
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.99 - 9.99	340 7.15	5.99 - 7.99	210 7.02	6.99	60 6.99	7.99 - 10.99	20 9.41		
Private Brand	6.99 - 9.99	270 7.09	6.99 - 7.99	520 7.26	6.99 - 7.99	1,150 7.48	6.99	40 6.99		
Category 2										
Processor Brand	4.49 - 5.99	30 5.27	4.99	10 4.99						
Private Brand	4.98 - 5.99	340 5.45								
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.50 - 3.50	2,140 2.98	1.99 - 2.69	1,740 3.22	2.49 - 3.79	790 3.20	2.50 - 3.50	340 3.46		
Private Brand	2.69 - 3.33	330 2.97	2.50 - 3.00	500 2.92			2.19 - 3.99	340 3.66		
Turkey 16 oz	5.40	100 5 10	4.70	400 470	4.00 5.40	440 500				
Processor Brand Private Brand	5.49	180 5.49	4.79	120 4.79	4.99 - 5.49	410 5.29				
Chicken 7-10 oz										
Processor Brand	2.50 - 3.50	2,040 2.99	2.00 - 2.99	1,650 3.25	2.49 - 3.79	750 3.24	2.50 - 3.50	340 3.46		
Private Brand	2.69 - 3.33	330 2.97	2.50 - 2.99	500 2.92	2.49 - 3.19	750 5.24	2.19 - 3.99	340 3.66		
1 Tivate Dialiu	2.00 - 0.00	JJU 2.31	2.00 - 0.00	300 2.92			2.10 - 0.09	3-0 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)