

USDA Weekly Retail Turkey Feature Activity

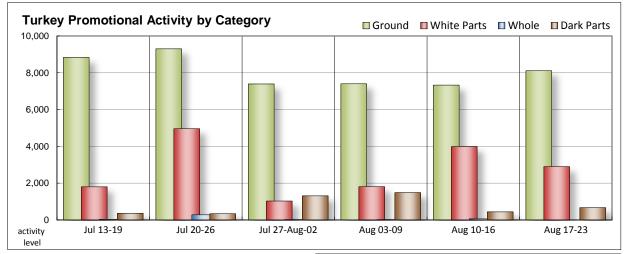
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/17 thru 08/23.

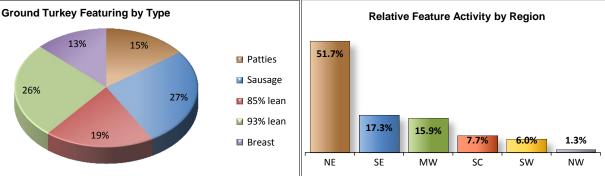
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted;												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST	YEAR						
Feature Rate 1/	40.1%	of 22,500	40.7%	of 22,500	35.2% of 19,500 outlets 2.5%							
reature Kate	ou	tlets	ou	tlets								
Special Rate 4/	1.	.6%	0.	.1%								
Activity Index 2/	13	,950	14	,040	11,420							
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens			60	1.79								
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh			30		20							
Frozen	800	1.87	60	1.62	550	1.24						
Split, bone-in												
Fresh	180				20							
Rotisserie	660		1,250		460							
Boneless, whole	270	4.27	580	3.99	180							
Cutlets	720	4.69	950	4.30	1,090	4.73						
Cutlets, thin sliced			100	4.99								
Strips												
Tenders	270	3.99	1,020	4.30	310	4.37						
Marinated Tenders	1,600	5.20	610	4.39	730	5.01						
Drumsticks	180	1.99	190	2.02	50	1.87						
Thighs	150	2.05			40	2.17						
Wings	140	1.89	140	1.94	30	1.59						
Necks	140	1.69	70	2.16								
Smoked Drumsticks	20	1.99	10	2.25	30	2.43						
Smoked Wings	30	1.96	10	2.25	130	2.09						
Smoked Necks	10	1.99	20	1.99								
GROUND TURKEY:	8,110	3.23	7,330	3.24	7,090	3.39						
Patties	1,210	3.47	420	3.06	450	3.26						
Sausage	2,170	2.97	2,080	3.39	790	3.23						
85% lean	1,560	2.57	870	2.48	1,070	2.26						
93% lean	2,120	3.18	3,640	3.26	2,820	3.04						
Breast	1,050	4.58	320	4.62	1,960	4.59						
Rolls (frsh/frz 1 lb.)	390	1.87	280	2.08	280	2.45						
Specialty 5/						·						
Patties	20		180	3.77								
93-94% lean	260	3.97	500		140	3.49						
Breast			650									
Note: rolls & specialty no	ot included	d in ground	turkey tot	al and weig	hted avera	age.						

This Week's Turkey Feature Highlights

Retail feature activity is only slightly less active on turkey items. Grocers show no interest in promoting whole turkeys; instead they are heavily promoting frozen bone-in breasts. Offerings slow on rotisserie breasts; prices are lower. Fewer stores place boneless white parts in this week's circulars. Marinated tenders are the most widely promoted white part, but the higher prices may put a damper on shoppers' interest. Offerings increase on dark parts, which are fully represented; prices are lower on most items. Ground turkey featuring is more active on all of the grinds except the 93% lean. There are some very attractive advertised prices on sausage this week. Deli feature activity increases with a fairly even mix of service and self-service offerings. Service deli offerings increase on the less expensive thin slicing meats and deli shaving meats; private brands outnumber processor brands on these deli items. Advertised prices trend lower on self-service deli. School is starting, or has started in many areas; summer vacations are just a memory now.





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 17, 2012

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/17 thru 08/23.

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

	NORTH	HEAST U.S.			SOUT	HEAST U.S.	MIDWEST U.S.					
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,F	RI,VT)	(A	AL,FL,GA,M	S,NC,SC,TN,VA,V	VV)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				
Feature Rate 1/	(, , , , , , , , , , , , , , , , , , ,	0 sampled outle		,		00 sampled outle		32.3% of 4,000 sampled outlets 5.6% of stores w/ no-price promotions				
Special Rate 4/	0.0% of stores w	•			•	v/ no-price prome						
Activity Index ^{2/}		Index = 7,130		0.07			21.01.0		Index = 1,990	10110110		
Activity index	Price Range	Summar	Activity Index = 3,260 Price Range Summary				Price Range	Summ	arv			
	(\$/pound)		y Vtd Avg		ound)		Vtd Avg	(\$/pound)	Stores	Wtd Avg		
					·							
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole Fresh												
Fresn Frozen	1.79 - 1.97	180	1.80	1 20	- 1.97	260	1.84	1.38 - 2.29	310	1.96		
Split, bone-in	1.79 - 1.97	160	1.00	1.29	- 1.97	200	1.04	1.30 - 2.29	310	1.90		
Fresh	2.99	180	2.99									
Rotisserie	5.99 - 8.99	480	7.50					7.99	10	7.99		
Boneless, whole	3.99 - 5.59	220	4.33		3.99	40	3.99	7.55	10	7.55		
,		_		2.00								
Cutlets	3.99 - 5.99	590	4.78	3.99	- 5.99	60	4.64					
Cutlets, thin sliced												
Strips												
Tenders	3.99	160	3.99		3.99	40	3.99	4.00 5.00		4 75		
Marinated Tenders	4.66 - 5.33	340	4.92		5.33	1,180	5.33	4.26 - 5.33	20	4.75		
Drumsticks	1.99	180	1.99					4.70	00	4.70		
Thighs	2.29 - 2.49	60	2.43					1.79	90	1.79		
Wings	1.89	140	1.89									
Necks	1.69	140	1.69		1.00	10	1.00	4.00	10	1.00		
Smoked Drumsticks					1.99 1.99	10	1.99 1.99	1.99	10 20	1.99 1.94		
Smoked Wings Smoked Necks					1.99	10 10	1.99	1.89 - 1.99	20	1.94		
GROUND TURKEY:					1.99	10	1.99					
Patties	2.98 - 3.99	760	3.35		3.49	10	3.49	2.99 - 3.99	300	3.68		
Sausage	2.79 - 4.09	770	3.41	2 50	- 2.79	1,050	2.50	3.19 - 3.99	270	3.46		
85% lean	1.99 - 3.00	860	2.54		- 2.73	340	2.58	2.50	10	2.50		
93% lean	2.30 - 4.99	1,030	3.18		- 3.19	160	3.13	2.91 - 3.33	530	3.10		
Breast (99-100% lean)	4.61 - 5.38	720	4.76	0.00	4.79	70	4.79	2.80 - 4.98	220	3.10		
Rolls (frsh/frz 1 lb.)	1.50 - 1.79	60	1.54		1.50	20	1.50	1.79 - 2.50	180	2.21		
Specialty 5/			****			100	****	=				
Patties	4.49	20	4.49									
93-94% lean	3.99 - 4.99	240	4.02					3.33	20	3.33		
Breast			-									





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

		ENTRAL U.S.	SOUTHWEST U.S.						NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,	(CA,HI,NV)				(AK,ID,MT,OR,WA,WY) 20.5% of 1,200 sampled outlets					
Feature Rate 1/	20.4% of 4,00	0 sampled outlet	16.6% of 2,900 sampled outlets									
Special Rate 4/	3.6% of stores w/	no-price promo	0.0% of stores w/ no-price promotions Activity Index = 550				0.0% of stores w/ no-price promotions					
Activity Index 2/	Activity	Index = 970					Activity Index = 50					
·	Price Range	/	Price I	Price Range		Summary		Price	Range	Sum	mary	
	(\$/pound)	Stores W	/td Avg	(\$/pc	und)	Stores	Wtd	Avg	(\$/pc	ound)	Stores	Wtd Avg
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.38 - 1.89	50	1.66									
Split, bone-in												
Fresh												
Rotisserie	5.99 - 8.99	160	8.09		8.99	10)	8.99				
Boneless, whole	3.99	10	3.99									
Cutlets	3.99	70	3.99									
Cutlets, thin sliced												
Strips												
Tenders	3.99	70	3.99									
Marinated Tenders	3.99	30	3.99							4.99	30	4.99
Drumsticks												
Thighs												
Wings												
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.49 - 3.88	110	3.65	3.49	- 3.50	30)	3.50				
Sausage	2.94 - 3.23	60	3.13		2.87	20)	2.87				
85% lean	2.33 - 3.08	170	2.89	2.33	- 2.39	180		2.33				
93% lean	2.49 - 3.23	90	2.99	2.79	- 3.50	300)	3.37		3.59	10	3.59
Breast (99-100% lean)	4.16 - 4.99	30	4.74							3.99	10	3.99
Rolls (frsh/frz 1 lb.)	1.00 - 1.69	120	1.56		2.29	10)	2.29				
Specialty ^{5/}												
Patties												
93-94% lean												
Breast									1			



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 17, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/17 thru 08/23.

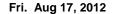
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	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)			
Feature Rate 1/	78.9% o	f 22,500	74.8% o	f 22,500	81.5% o	f 19,500						
Feature Rate	sto	res	sto	res	sto	res	93.2% of 4,400 sampled outlets		80.3% of 6,000 sampled outlets			
Activity Index 2/	53	170	47,	100	50	660	Activity Inde	ex = 16,430		Activity Ind	ex = 11,450	
Activity index 2/	33,	170	41,	130	30,	000	Price Range	Summary		Price Range		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wto	d Avg	(\$/pound)	Stores	Wtd Avg
SERVICE DELI - Turkey												
Category 1	F 400	7.00	0.040	0.00	F F00	7.70	5.00 40.00	0.000	7.74	0.00 0.00	4 400	0.00
Processor Brand Private Brand	5,190 1,680	7.89 7.64	6,640 4,100	8.08 7.81	5,500 2,030	7.70 7.55	5.88 - 10.99 6.99 - 8.99	2,020 1,060	7.71 7.58	6.99 - 9.99 7.99	1,420 380	8.96 7.99
Category 2	1,080	7.04	4,100	7.01	2,030	7.55	6.99 - 6.99	1,000	7.56	7.99	360	7.99
Processor Brand	4,530	5.62	4.160	5.70	5,010	5.64	4.48 - 6.99	1,070	5.78	4.99 - 6.99	620	6.24
Private Brand	5,750	6.65	2,990	6.17	3,830	6.24	4.99 - 6.99	2,050	6.58	4.99 - 6.99	870	6.11
Category 3	0,700	0.00	2,550	0.17	0,000	0.24	4.50 0.55	2,000	0.00	4.00 0.00	070	0.11
Processor Brand	850	3.98	1.160	3.79	410	3.99	3.99 - 4.99	130	4.45	3.99 - 4.99	120	4.90
Private Brand	1,400	4.95	220	4.03	1,460	4.69	3.99 - 4.99	170	4.79	3.99 - 4.99	1,220	4.97
Turkey Ham	,				,						, -	
Processor Brand	450	3.81	230	3.11	190	3.14	3.49 - 4.99	270	4.15			
Private Brand			20	3.99	20	3.89						
Turkey Pastrami												
Processor Brand	320	3.98	200	4.29	140	3.70	3.49 - 4.99	220	3.72			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4,240	7.46	3,800	7.66	4,850	7.26	5.99 - 8.99	2,390	8.02	5.98 - 8.99	360	8.15
Private Brand	1,360	7.06	3,110	7.23	840	6.73	6.99	960	6.99	6.99	60	6.99
Category 2												
Processor Brand	100	4.98	120	4.84	280	5.11	4.99 - 5.99	20	5.27	4.99	10	4.99
Private Brand	1,360	5.03	510	5.29			4.99	120	4.99	4.99	1,180	4.99
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,560	3.17	8,220	3.19	10,090	3.13	2.50 - 3.99	1,790	3.42	2.50 - 3.99	1,980	3.15
Private Brand	2,780	2.57	1,510	3.14	2,910	3.05	2.50 - 2.99	1,060	2.62	2.50 - 3.00	500	2.57
Turkey 16 oz	4.050	5.04	4 400	5.00	770	5 00	4.40 0.70	0.40	5.04	4.70 0.70	050	4.07
Processor Brand	1,850	5.31	1,100	5.32	770	5.08	4.49 - 6.79	640	5.24	4.79 - 6.79	250	4.97
Private Brand Chicken 7-10 oz												
Processor Brand	8,970	3.19	7,890	3.20	9,440	3.13	2.50 - 3.99	1,400	3.54	2.50 - 3.99	1,980	3.15
Private Brand	2,780	2.57	1,510	3.20 3.14	2,890	3.13	2.50 - 3.99	1,400	3.54 2.62	2.50 - 3.99	500	2.57
Filvate Dialiu	2,700	2.57	1,510	3.14	۷,090	3.03	2.50 - 2.55	1,000	2.02	2.00 - 3.00	300	۷.31

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 08/17 thru 08/23.

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

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(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	HI,NV)	(AK,ID,MT,	OR,WA,WY)		
Feature Rate 1/	94 09/ of 4 000	sampled outlets	73.3% of 4,000 sampled outlets 63.0% of 2,900 sampled outlets				66.1% of 1,200 sampled outlets			
		•	·	ndex = 7,970	· ·	dex = 5,790	Activity Index = 2,370			
Activity Index 2/	Activity Index = 9,160 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 A			
SERVICE DELI - Turkey	(+- /	<u> </u>	(++ /	J	(11)	J	(1,1,2,2,7)	J		
Category 1										
Processor Brand	6.79 - 11.99	250 7.78	5.49 - 7.99	800 6.23	6.99 - 8.99	400 8.35	6.99 - 12.99	300 7.93		
Private Brand	6.99 - 7.99	40 7.54	6.99 - 8.49	200 7.27						
Category 2										
Processor Brand	4.49 - 6.99	1,660 5.15	4.99 - 5.99	670 5.48	5.90 - 6.99	470 6.30	4.99 - 5.99	40 5.58		
Private Brand	4.98 - 6.99	990 6.31	5.98 - 7.99	780 6.96	6.99 - 7.99	590 7.47	6.99 - 7.49	470 7.13		
Category 3										
Processor Brand	2.99 - 4.99	350 3.76	3.99	50 3.99	2.99 - 4.99	180 3.47	3.98	20 3.98		
Private Brand	4.99	10 4.99								
Turkey Ham	0.00 5.40	40 4 47	0.00 0.00	20 240	4.07 0.40	440 0.04				
Processor Brand Private Brand	2.99 - 5.49	40 4.47	2.99 - 3.29	30 3.18	1.97 - 3.49	110 2.91				
Turkey Pastrami Processor Brand	3.98 - 6.99	70 4.78	3.98	30 3.98						
Private Brand	3.90 - 0.99	70 4.76	3.90	30 3.90						
SERVICE DELI - Chicken										
Category 1	4.05 0.40	F20 6.06	F 70 0 00	380 6.32	5.00	580 5.99	7.00	10 7.98		
Processor Brand Private Brand	4.95 - 8.49 6.99 - 7.49	520 6.86 140 7.07	5.79 - 8.99 6.99 - 7.99	380 6.32 70 7.31	5.99	580 5.99	7.98 7.49	10 7.98 130 7.49		
Category 2	0.99 - 7.49	140 7.07	6.99 - 7.99	70 7.31			7.49	130 7.49		
Processor Brand	4.58 - 4.99	60 4.89	4.99	10 4.99						
Private Brand	4.99 - 5.98	30 5.60	5.98	30 5.98						
SELF-SERVICE DELI	4.00 0.00	00 0.00	0.00	00 0.50						
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	1.99 - 3.99	1,980 2.86	2.00 - 2.69	1,940 2.97	2.50 - 4.49	1,340 3.42	2.19 - 4.49	530 3.67		
Private Brand	2.50 - 3.48	460 2.53	1.99 - 3.00	420 2.51	2.50	270 2.50	2.50	70 2.50		
Turkey 16 oz										
Processor Brand	4.79 - 5.99	250 5.18	4.88 - 5.00	270 4.95	4.99	240 4.99	6.99	200 6.99		
Private Brand										
Chicken 7-10 oz										
Processor Brand	2.00 - 3.99	1,850 2.89	2.00 - 2.69	1,870 2.97	2.50 - 4.49	1,340 3.42	2.19 - 4.49	530 3.67		
Private Brand	2.50 - 3.48	460 2.53	1.99 - 3.00	420 2.51	2.50	270 2.50	2.50	70 2.50		

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)