



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/02 thru 11/08.

Fri. Nov 02, 2012

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

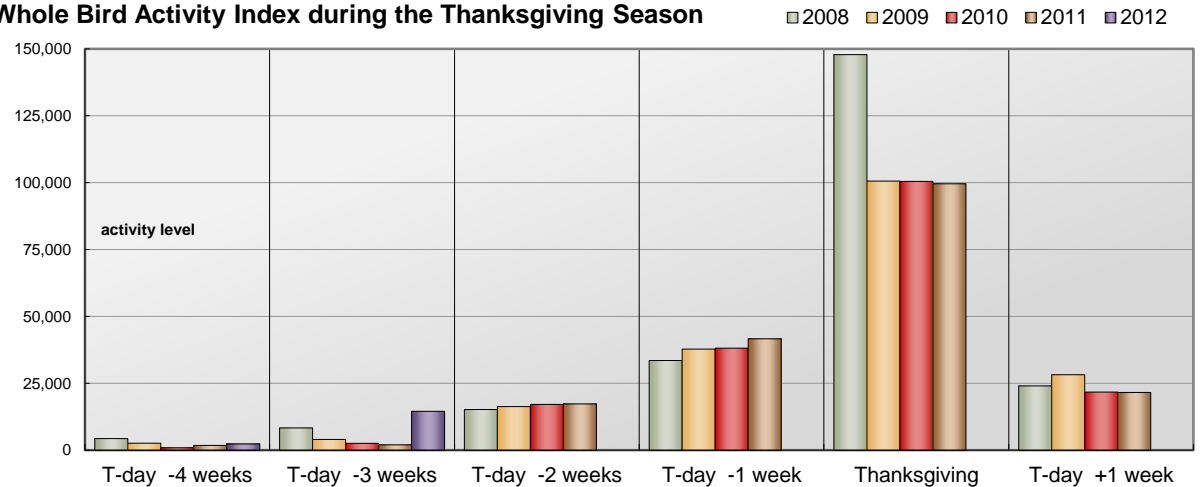
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	43.6% of 22,500 outlets		33.1% of 22,500 outlets		46.5% of 19,500 outlets	
Special Rate ^{4/}	1.9%		1.8%		11.1%	
Activity Index ^{2/}	28,370		13,490		27,510	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	20	1.99				
" - Toms	20	1.99				
Frozen - Hens	7,310	0.92	1,180	1.07	8,760	0.85
" - Toms	7,220	0.89	1,180	1.07	8,560	0.83
PARTS:						
Breast:						
Bone-in, whole						
Fresh	30	3.49	40	2.39		
Frozen	1,740	1.90	570	2.02	2,130	1.76
Split, bone-in						
Fresh	20	2.99	170	1.99		
Rotisserie	870	8.31	400	8.33	300	8.99
Boneless, whole	20	3.99				
Cutlets	880	4.15	230	5.16	210	4.67
Cutlets, thin sliced			100	4.99		
Strips						
Tenders	890	4.01	690	4.55	260	4.45
Marinated Tenders	310	4.87	260	4.28	730	4.47
Drumsticks	20	1.64	110	1.75	450	1.83
Thighs	10	1.99	140	1.80		
Wings	70	2.75	70	1.82	390	1.86
Necks	10	1.29	60	1.69	20	1.24
Smoked Drumsticks	70	1.99	160	1.95	180	2.46
Smoked Wings	60	1.82	150	1.90	250	2.41
Smoked Necks	60	1.82	150	1.80	180	1.88
GROUND TURKEY:	8,420	3.53	7,510	3.31	4,640	3.35
Patties	370	3.81	630	3.23	790	3.34
Sausage	620	3.40	1,690	3.55	2,140	3.14
85% lean	610	2.52	1,470	2.41	280	2.35
93% lean	4,770	3.24	2,620	3.26	600	2.94
Breast	2,050	4.61	1,100	4.57	830	4.51
Rolls (frsh/frz 1 lb.)	80	2.10	30	2.00	60	1.63
Specialty ^{5/}						
Patties	10	5.99	20	3.79	130	4.00
93-94% lean	180	4.55	270	4.41	240	4.36
Breast	50	5.82			20	5.49

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

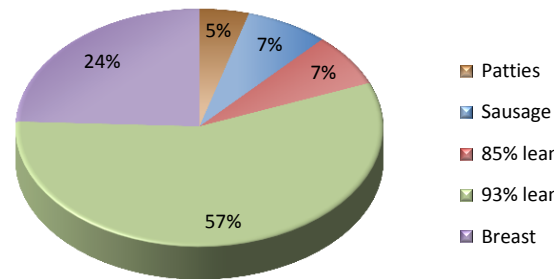
This Week's Turkey Feature Highlights

Retail activity increases heading into November and the Thanksgiving holiday; it is turkey time and turkey promotions are getting front page exposure. Offerings are very active on frozen hens and toms, only slightly behind last year's activity level. Prices are sharply lower compared to last week, higher compared to a year ago. Feature activity increases on frozen bone-in breasts compared to last week; prices are lower. More stores are promoting rotisserie breasts and prices are slightly lower. Offerings are very active on cutlets and tenders; both are priced lower to catch the shoppers' attention. There is less interest in promoting dark parts. More stores are placing ground turkey in this week's circulars; the majority of the ads are on 93% lean at slightly lower prices. Feature activity slows on deli items. Offerings on service deli thick slicing meats increase in volume and price. Self-service deli promotions are less active. The East coast is dealing with the aftermath of Hurricane Sandy and marketing and delivery will be impacted in some areas. Let's hope things get back to normal as quickly as possible.

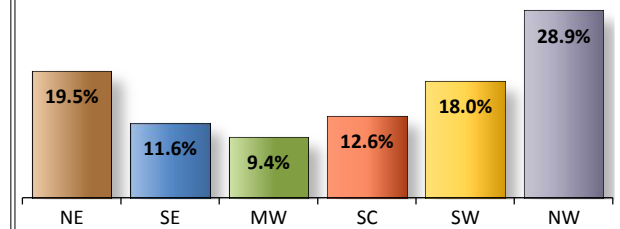
Whole Bird Activity Index during the Thanksgiving Season



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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Fri. Nov 02, 2012

(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/}	60.0% of 4,400 sampled outlets			37.8% of 6,000 sampled outlets			39.2% of 4,000 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,390			Activity Index = 5,960			Activity Index = 3,230		
	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	1.99	20	1.99						
" - Toms	1.99	20	1.99						
Frozen - Hens	0.59 - 1.39	1,210	0.69	0.59 - 1.49	1,680	1.05	0.69 - 1.49	770	0.97
" - Toms	0.59 - 1.39	1,210	0.69	0.59 - 1.49	1,680	1.05	0.69 - 1.49	760	0.97
PARTS:									
Breast:									
Bone-in, whole									
Fresh	3.49	30	3.49						
Frozen	1.38 - 2.99	350	2.12	1.29 - 2.49	680	1.91	1.38 - 1.99	470	1.75
Split, bone-in									
Fresh	2.99	20	2.99						
Rotisserie	6.89 - 8.99	470	7.55				7.49	10	7.49
Boneless, whole									
Cutlets	3.99 - 4.99	720	4.16	3.99	70	3.99	3.99	10	3.99
Cutlets, thin sliced									
Strips									
Tenders	3.99	510	3.99	3.99	70	3.99			
Marinated Tenders	3.73 - 5.33	280	4.85				4.99	30	4.99
Drumsticks	1.99	10	1.99				1.29	10	1.29
Thighs	1.99	10	1.99						
Wings	2.99	40	2.99	2.99	20	2.99	1.29	10	1.29
Necks							1.29	10	1.29
Smoked Drumsticks	1.99	50	1.99	1.99	10	1.99	1.99	10	1.99
Smoked Wings	1.79	50	1.79				1.99	10	1.99
Smoked Necks	1.79	50	1.79				1.99	10	1.99
GROUND TURKEY:									
Patties	3.50	70	3.50	3.50	40	3.50	2.99 - 3.99	190	3.96
Sausage	2.80 - 3.59	230	3.14	2.80 - 3.59	40	3.18	3.11 - 4.79	280	3.69
85% lean	1.99 - 3.29	150	2.81	1.99 - 2.83	240	2.13	2.48 - 2.63	20	2.58
93% lean	2.30 - 3.99	1,300	3.25	2.30 - 3.49	1,330	3.37	2.99 - 3.49	560	3.18
Breast (99-100% lean)	3.99 - 5.38	390	4.65	3.99	90	3.99	3.99	20	3.99
Rolls (frsh/frz 1 lb.)							1.98 - 2.50	20	2.12
Specialty ^{5/}									
Patties	5.99	10	5.99						
93-94% lean	3.99 - 5.00	160	4.58				4.29	20	4.29
Breast	5.49 - 6.99	30	5.87	5.49	10	5.49	5.99	10	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/}	40.1% of 4,000 sampled outlets			38.7% of 2,900 sampled outlets			50.5% of 1,200 sampled outlets		
Special Rate ^{4/}	8.0% of stores w/ no-price promotions			1.1% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 4,320			Activity Index = 4,490			Activity Index = 2,980		
	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									
" - Toms									
Frozen - Hens	0.98 - 1.49	1,450	0.87	0.59 - 1.00	1,240	0.83	0.67 - 1.49	960	1.15
" - Toms	0.98 - 1.49	1,370	0.81	0.55 - 0.99	1,240	0.71	0.55 - 1.49	960	1.14
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.38 - 2.88	220	1.89				1.48	20	1.48
Split, bone-in									
Fresh									
Rotisserie				8.99	190	8.99	9.49	200	9.49
Boneless, whole									
Cutlets	3.99	10	3.99				4.79	20	4.79
Cutlets, thin sliced									
Strips									
Tenders	3.99	100	3.99	3.99	190	3.99	4.79	20	4.79
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.49 - 3.99	30	3.77	3.99	40	3.99
Sausage				2.86 - 3.27	30	3.09	3.27	40	3.27
85% lean	2.33 - 2.91	190	2.77	2.39	10	2.39			
93% lean	2.49 - 3.19	410	3.14	2.79 - 3.99	780	3.13	3.19	390	3.19
Breast (99-100% lean)	2.39 - 4.79	460	4.61	3.99 - 5.19	770	4.61	4.79	320	4.79
Rolls (frsh/frz 1 lb.)	1.50 - 1.98	40	1.84	2.29	10	2.29	2.89	10	2.89
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 02, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/02 thru 11/08.

(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		79.0% of 4,400 sampled outlets Activity Index = 16,620			76.6% of 6,000 sampled outlets Activity Index = 7,910		
Feature Rate ^{1/}	69.2% of 22,500 stores		69.6% of 22,500 stores		81.6% of 19,500 stores							
Activity Index ^{2/}	46,010		47,090		46,770							
	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	9,050	7.74	4,270	7.70	5,150	8.12	5.99 - 9.99	3,580	8.07	6.98 - 9.99	4,090	7.44
Private Brand	4,630	7.51	3,060	7.45	1,980	7.27	6.99 - 9.99	3,840	7.58	6.99 - 7.49	240	7.22
Category 2												
Processor Brand	4,320	5.91	6,090	5.96	4,370	5.92	4.99 - 6.99	910	6.03	4.99 - 6.99	860	5.81
Private Brand	2,100	6.19	2,170	6.50	3,780	5.72	5.99 - 6.99	580	6.56	5.99 - 6.99	100	6.37
Category 3												
Processor Brand	420	3.80	680	3.73	1,590	4.12	3.67 - 3.99	50	3.88	3.99	70	3.99
Private Brand	1,490	5.26	40	2.98	150	4.98	2.98 - 4.98	140	4.28			
Turkey Ham												
Processor Brand	610	3.82	470	4.34	140	2.76	2.99 - 4.98	510	4.03			
Private Brand					20	4.99						
Turkey Pastrami												
Processor Brand	440	3.98	500	4.11	440	3.75	3.79 - 3.99	430	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,470	7.27	4,480	7.12	3,200	7.44	5.99 - 9.99	720	7.69	8.99	160	8.99
Private Brand	2,050	7.22	1,210	6.40	610	6.62	5.99 - 7.99	1,720	7.36	7.99	10	7.99
Category 2												
Processor Brand	70	5.46	460	5.47	1,840	6.62	4.99	10	4.99			
Private Brand			10	3.98								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,340	3.16	8,890	2.95	11,170	3.11	2.99 - 3.99	1,640	3.31	2.77 - 3.99	1,120	3.06
Private Brand	630	3.11	2,510	2.93	660	2.94	2.99 - 3.33	310	3.10	2.99	30	2.99
Turkey 16 oz												
Processor Brand	790	5.05	1,220	4.99	480	4.73	5.00 - 5.99	550	5.07	5.00 - 5.99	80	5.21
Private Brand												
Chicken 7-10 oz												
Processor Brand	7,970	3.15	8,520	2.52	10,530	3.11	2.99 - 3.99	1,320	3.32	2.77 - 3.99	1,120	3.06
Private Brand	630	3.11	2,510	2.93	660	2.95	2.99 - 3.33	310	3.10	2.99	30	2.99

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

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/02 thru 11/08.

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

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)		
	63.1% of 4,000 sampled outlets			55.0% of 4,000 sampled outlets			61.6% of 2,900 sampled outlets			82.6% of 1,200 sampled outlets		
	Activity Index = 7,980			Activity Index = 4,850			Activity Index = 5,790			Activity Index = 2,860		
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	5.99 - 10.49	560	7.51	6.99 - 8.99	470	8.01	6.99 - 7.99	320	7.79	6.99 - 11.99	30	8.93
Private Brand	6.99 - 8.99	150	7.32	6.99 - 7.99	400	7.11						
Category 2												
Processor Brand	4.49 - 6.99	1,200	5.76	4.99 - 5.99	420	5.71	4.99 - 6.99	610	5.75	6.59 - 6.99	320	6.93
Private Brand	4.48 - 6.99	910	5.91	5.99	320	5.99	5.99	40	5.99	5.99 - 6.99	150	6.89
Category 3												
Processor Brand	2.99 - 4.99	230	3.62				2.99	30	2.99	3.98 - 5.97	40	5.03
Private Brand					480	5.24	5.99	550	5.99	3.50 - 5.99	320	4.46
Turkey Ham												
Processor Brand	2.49 - 3.49	20	2.89	3.49	10	3.49	2.49 - 2.79	70	2.62			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49	10	3.49									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 7.99	420	6.91	5.88 - 10.99	190	7.92	5.99 - 7.99	780	6.63	6.99	200	6.99
Private Brand	5.49 - 7.99	240	5.92	7.99	80	7.99						
Category 2												
Processor Brand	4.98 - 5.99	60	5.54									
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,860	2.88	1.99 - 2.98	1,220	3.04	2.48 - 3.99	1,600	3.35	1.98 - 3.99	900	3.41
Private Brand	2.50 - 3.33	190	3.19				2.99	100	2.99			
Turkey 16 oz												
Processor Brand	4.99	120	4.99	4.59	40	4.59						
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,820	2.87	1.99 - 2.98	1,220	3.04	2.48 - 3.99	1,590	3.35	1.98 - 3.99	900	3.41
Private Brand	2.50 - 3.33	190	3.19				2.99	100	2.99			

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)