

USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/15 thru 03/21.

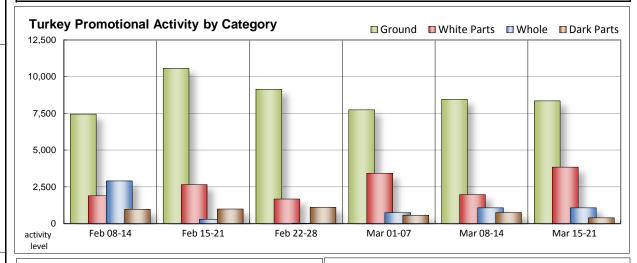
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

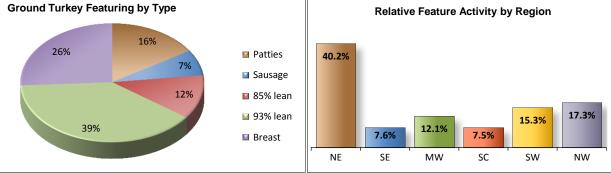
NATIONAL SUMMARY												
THIS WEEK LAST WEEK LAST YEAR												
Feature Rate 1/		of 23,200		of 23,200	29.7% of 22,500 outlets							
		tlets		tlets								
Special Rate 4/		8%		.1%		0%						
Activity Index 2/ 3/	Stores	,480 Wtd Avg	Stores	,320 Wtd Avg	Stores	770 Wtd Avg						
WHOLE BIRDS:	Stores	wtu Avg	Stores	wtu Avg	Stores	wtu Avg						
Fresh - Hens	150	1.71			20	1.69						
" - Toms	140					1.00						
Frozen - Hens	420		830	0.99	10	0.99						
" - Toms	360	_	240		10	0.99						
PARTS:												
Breast:												
Bone-in, whole												
Fresh	170	3.33	20	2.49								
Frozen	2,170	1.63	570	1.95	1,400	1.86						
Split, bone-in												
Fresh												
Rotisserie	540	6.83	800	8.00	680	7.97						
Boneless, whole	20	4.99	10	3.99	10	5.99						
Cutlets	520	5.15	350	5.06	460	4.90						
Cutlets, thin sliced			100	4.99	10	4.99						
Strips												
Tenders	420	4.79	120	4.99	1,050	4.93						
Marinated Tenders	300	4.44	70	4.08	910	4.23						
Drumsticks	90	1.88	70	1.87	60	1.54						
Thighs	110	1.82	70	2.32	10	1.89						
Wings	80	1.96	40	1.69	80	1.57						
Necks	50	1.99	10	1.29								
Smoked Drumsticks	20	1.99	190	2.01	10	1.93						
Smoked Wings	20	1.99	190	1.82	20	1.84						
Smoked Necks	20	1.99	180	1.79	10	1.69						
GROUND TURKEY:	8,350	3.57	8,450	3.11	4,170	3.77						
Patties	1,340		130		200							
Sausage	590		820		730							
85% lean	1,000		2,960		190							
93% lean	3,260		4,220		1,360							
Breast	2,160		320		1,690							
Rolls (frsh/frz 1 lb.)	420	2.23	600	2.34	20	2.00						
Specialty 5/				4.00		4.00						
Patties		4.55	10		10							
93-94% lean	60		380		800							
Breast	50		20		20							
Note: rolls & specialty no	n included	ı in ground	turkey tota	ai and weig	neu avera	ıye.						

This Week's Turkey Feature Highlights

Retail feature activity increases on turkeys. Fresh whole turkeys make an appearance in this week's circular; we'll see a lot more of them in the coming weeks. Promotional activity decreases on frozen hens, increases on frozen toms; prices are higher. Consumers will find plenty of frozen bone-in breasts featured this week; the lower prices are sure to grab shoppers' attention. Offerings decline on rotisserie breasts; sharply lower advertised prices will tempt consumers. Retailers increase featuring on white boneless parts; prices are mixed. Dark parts promotional activity is the lowest it has been in weeks; the focus is on fresh parts this week. The level of feature activity on ground turkey is similar to last week. The big change comes in the mix; there are fewer promotions on 85% and 93% lean, and a huge increase on ground breast. Deli promotional activity slows. Stores decrease offerings and prices on whole muscle meat, instead promoting more thin slicing

meats at higher prices. Offerings increase on self-service deli due to very active promotions on 16 ounce packages.





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	HEAST U.S.		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)			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)								
Feature Rate 1/	·	0 sampled outle				00 sampled outle	45.0% of 4,200 sampled outlets				
Special Rate 4/	0.4% of stores w	•			•	•			, ·		
Activity Index 2/		Index = 6,990	tions	3.5% of stores w/ no-price promotions Activity Index = 1,810				2.4% of stores w/ no-price promotions Activity Index = 1,910			
Activity index	Price Range	Summar	Price I	Price Range Summary				Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Stores Wtd Avg		(\$/pound)	Stores	,	
WHOLE BIRDS:											
Fresh - Hens	1.69 - 1.99	140	1.71					1.69	9 /	1.69	
" - Toms	1.69	130	1.69					1.69		1.69	
Frozen - Hens	0.99 - 1.49	340	1.25		0.99	40	0.99				
" - Toms	0.99 - 1.49	280	1.22		0.99	40	0.99				
PARTS:											
Breast:											
Bone-in, whole											
Fresh	2.49 - 3.49	160	3.37								
Frozen	1.29 - 2.27	340	1.65	1.49	2.59	790	1.71	1.49 - 2.59	9 6	1.50	
Split, bone-in											
Fresh											
Rotisserie	4.99 - 7.49	420	6.56		7.49	40	7.49	7.88	3 8	7.88	
Boneless, whole	4.99	20	4.99								
Cutlets	4.99 - 5.99	510	5.13								
Cutlets, thin sliced											
Strips											
Tenders	4.79 - 4.99	350	4.91					3.83	3 6	3.83	
Marinated Tenders	4.26 - 4.66	300	4.44								
Drumsticks	1.69 - 1.99	30	1.83	1.39	1.99	50	1.90	1.98	3	1.98	
Thighs	1.99	10	1.99					1.79 - 1.98	3 10		
Wings	1.99	30	1.99	1.69	1.99	50	1.95				
Necks					1.99	50	1.99				
Smoked Drumsticks	1.99	20	1.99								
Smoked Wings	1.99	20	1.99								
Smoked Necks	1.99	20	1.99								
GROUND TURKEY:											
Patties	2.99 - 3.79	760	3.36	3.00	3.50	90	3.42	3.00 - 3.50) 20	3.46	
Sausage	2.49 - 3.99	170	3.62	3.00	3.99	130	3.53				
85% lean	1.99 - 3.84	490	3.05	2.40	2.99	200	2.64	2.40 - 2.9°	1 1	10 2.52	
93% lean	1.92 - 3.84	1,820	3.21	3.00	3.84	160	3.44	2.49 - 3.49	9 36	30 2.95	
Breast (99-100% lean)	3.83 - 5.38	550	4.64	4.61	4.79	170	4.72	3.33 - 4.79		90 4.64	
Rolls (frsh/frz 1 lb.)								1.25 - 2.99	9 27	70 2.34	
Specialty ^{5/}											
Patties											
93-94% lean	3.99 - 6.99	50	4.62								
Breast	6.99	30	6.99	Na (545)				/ANAS1 0/10		0.54	



USDA Weekly Retail Turkey Feature Activity

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/15 thru 03/21.

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

	SOUTH (CENTRAL U.S.		SOUT	HWEST U.S.		NORTHWEST U.S. (AK,ID,MT,OR,WA,WY) 58.9% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions			
	(AR,AZ,CO,KS,I	_A,MO,NM,OK,TX	,UT)	(0	CA,HI,NV)					
Feature Rate 1/	28.1% of 4,20	0 sampled outlet	ts	39.4% of 2,9	000 sampled outle	ts				
Special Rate 4/	1.9% of stores w	/ no-price promo	tions	0.0% of stores	w/ no-price promo	tions				
Activity Index 2/		Index = 1,190		Activit	y Index = 1,760		Activity Index = 820			
	Price Range	Summar	У	Price Range	Summar	y	Price Range	Summa	ry	
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)		Ntd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.99	40	0.99							
" - Toms	0.99	40	0.99							
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.69	10	2.69	
Frozen	1.49 - 1.99	370	1.65	1.49 - 1.99	30	1.70	1.49 - 1.99	30	1.84	
Split, bone-in		0.0				0				
Fresh										
Rotisserie										
Boneless, whole										
•							6.25	10	6.05	
Cutlets							6.35	10	6.35	
Cutlets, thin sliced										
Strips										
Tenders							6.35	10	6.35	
Marinated Tenders										
Drumsticks										
Thighs										
Wings										
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties				3.49 - 3.99	280	3.97	4.49	10	4.49	
Sausage				3.27	270	3.27	3.27 - 4.49	20	3.88	
85% lean	2.00	20	2.00	2.39 - 2.66	180	2.64				
93% lean	2.49 - 3.59	230	3.03	2.79 - 3.59	430	3.21	3.19 - 3.59	260	3.51	
Breast (99-100% lean)	4.79	350	4.79	4.79	550	4.79	4.38 - 4.99	450	4.78	
Rolls (frsh/frz 1 lb.)	1.49 - 2.99	140	2.02	2.50	10	2.50				
Specialty ^{5/}										
Patties										
93-94% lean							3.99	10	3.99	
Breast				4.99	10	4.99	4.99	10	4.99	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 15, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/15 thru 03/21.

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

	N	ATIONAL	SUMMAR	RY			NORTHE#	AST U.S.	SOUTHEAST U.S.				
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	IH,NJ,NY,PA,RI,VT)	(AL,FL,GA,MS,N	C,SC,TN,VA,W\	/)		
Feature Rate 1/	64.1% o	f 23,200	58.7% o	f 23,200	73.3% c	of 22,500							
Feature Rate	sto	res	sto	res	sto	res	84.0% of 4,600 sa	ampled outlets	68.3% of 6,100	68.3% of 6,100 sampled outlets			
Activity Index 2/	36,	720	38	250	36	820	Activity Inde	ex = 11,150	Activity In	dex = 8,460			
Activity index 2/	30,	720	30,		30,	020	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	2,740	8.20	7,390	8.24	6,090	7.83	6.49 - 8.99	1,780 8.13	6.99 - 8.99	290	8.91		
Private Brand	1,680	7.43	2,450	7.56	1,650	7.62	6.88 - 8.99	960 7.51	6.99 - 7.99	280	7.42		
Category 2	2 200	0.04	2 000	F 00	2.250	0.00	4.00	4.040 0.40	4.00 5.00	250	5.04		
Processor Brand	3,320	6.01	3,090	5.90	,	6.09	4.99 - 6.99	1,040 6.12	4.99 - 5.99	250	5.91		
Private Brand	5,010	7.21	960	5.49	3,870	6.86	4.99 - 6.99	1,710 6.60	6.49 - 6.99	1,540	6.98		
Category 3 Processor Brand	1,090	4.54	920	3.68	670	4.03	2.99 - 4.99	220 4.55	3.99 - 4.99	110	4.16		
Private Brand	1,090	4.34	60	3.66 4.98		5.49	2.99 - 4.99 3.99 - 4.98	130 4.32	3.99 - 4.99	110	4.10		
Turkey Ham	130	4.32	60	4.90	130	5.49	3.99 - 4.96	130 4.32					
Processor Brand	450	3.88	470	3.87	270	4.17	3.49 - 4.49	360 4.07					
Private Brand	430	3.00	470	3.07	210	4.17	3.49 - 4.49	300 4.07					
Turkey Pastrami													
Processor Brand	510	4.65	260	4.82	360	4.70	3.49 - 4.99	370 4.03					
Private Brand	310	4.05	200	4.02	300	4.70	3.49 - 4.99	370 4.03					
SERVICE DELI - Chicken													
Category 1	3,070	7 07	2 240	7 40	1,640	7.50	5.99 - 8.99	860 8.24	5.00 0.00	1 210	7.10		
Processor Brand Private Brand	800	7.27 7.41	3,310 510	7.49 7.97	580	7.50		860 8.24 540 7.18	5.99 - 8.99	1,310	7.10		
Category 2	800	7.41	510	7.97	360	7.10	6.99 - 7.99	540 7.16					
Processor Brand	310	5.02	420	4.99	130	6.19	4.99	280 4.99					
Private Brand	170	5.99	220	5.92		5.47	4.99	200 4.99					
SELF-SERVICE DELI	170	5.99	220	5.92	410	3.47	-						
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	6.760	3.05	8,500	3.17	7,180	3.18	2.49 - 4.00	890 3.25	2.25 - 3.99	1,650	3.27		
Private Brand	720	3.20	610	2.81	1,400	2.90		310 2.85	2.50 - 3.50	50	2.81		
Turkey 16 oz	, 20	0.20	0.0	2.01	1,400	2.00		2.00	2.00 0.00		2.01		
Processor Brand	2.550	5.02	550	5.09	1.880	5.03	3.99 - 5.99	500 4.91	4.89 - 5.99	1,310	5.04		
Private Brand	90	4.49		2.30	.,230					,,,,,,,,,			
Chicken 7-10 oz													
Processor Brand	6,600	3.06	7,980	3.20	5,840	3.22	2.49 - 4.00	890 3.25	2.25 - 3.99	1,620	3.29		
Private Brand	720	3.21	550	2.85		2.90	2.50 - 3.50	310 2.85	2.80 - 3.50	50	3.03		

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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(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) 69.8% of 1,200 sampled outlets		
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,	HI,NV)			
Feature Rate 1/	59.2% of 4,200	sampled outlets	49.0% of 4,200	0 sampled outlets	49.8% of 2,900	sampled outlets			
Activity Index 2/	Activity In	ndex = 6,490	Activity I	ndex = 5,080	Activity In	dex = 3,100	Activity In	dex = 2,440	
Activity maex 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	6.98 - 11.99	400 7.94	6.49 - 9.99	40 8.87	7.99	220 7.99	12.99	10 12.99	
Private Brand	6.99 - 9.99	140 7.89	5.99 - 7.99	300 6.94					
Category 2	4.00	4.440	4.00 5.00	540 500	5.40 5.00	050 5.07	5.00 5.00	00 5.70	
Processor Brand	4.99 - 6.99	1,110 6.24	4.99 - 5.99	510 5.36	5.49 - 5.99	350 5.97	5.00 - 5.99	60 5.76	
Private Brand	4.99 - 8.99	560 5.81	4.99 - 8.99	320 8.33	8.99 - 9.49	560 9.48	8.99	320 8.99	
Category 3 Processor Brand	3.98 - 4.99	130 4.44	3.79 - 4.99	130 4.76	2.99	90 2.99	3.49 - 4.99	410 4.93	
Private Brand	3.90 - 4.99	130 4.44	3.79 - 4.99	130 4.70	2.99	90 2.99	3.49 - 4.99	410 4.93	
Turkey Ham									
Processor Brand	2.69 - 3.99	30 3.64	3.29	10 3.29	2.19 - 3.29	50 2.71			
Private Brand	2.00 - 0.00	30 3.04	0.23	10 3.23	2.10 - 0.20	30 2.71			
Turkey Pastrami									
Processor Brand	2.69 - 6.49	30 4.15	4.49 - 8.49	110 6.85					
Private Brand	2.03 - 0.43	30 4.13	4.45 - 0.45	110 0.00					
SERVICE DELI - Chicken									
Category 1 Processor Brand	5.49 - 6.99	770 6.42	6.99 - 7.99	130 7.67					
Private Brand	5.99 - 7.99	140 7.75	5.99 - 7.99	120 8.03					
Category 2	5.99 - 7.99	140 7.73	5.99 - 6.99	120 0.03					
Processor Brand	5.58	20 5.58	4.69	10 4.69					
Private Brand	5.98 - 5.99	170 5.99	4.03	10 4.00					
SELF-SERVICE DELI	3.30 - 3.33	170 5.99							
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.98 - 3.50	1,230 2.88	1.99 - 2.49	1,580 2.94	1.98 - 3.69	790 2.86	2.98 - 3.79	620 3.08	
Private Brand	2.99 - 3.39	130 3.05	2.77	30 2.77			3.99	200 3.99	
Turkey 16 oz									
Processor Brand	3.99 - 5.49	220 4.98	3.99 - 5.99	270 5.22	4.99	250 4.99			
Private Brand	4.49	90 4.49							
Chicken 7-10 oz									
Processor Brand	1.98 - 3.50	1,190 2.90	2.00 - 2.69	1,490 2.95	1.98 - 3.69	790 2.86	2.98 - 3.79	620 3.08	
Private Brand	2.99 - 3.39	130 3.05	2.77	30 2.77			3.99	200 3.99	

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)