

USDA Weekly Retail Turkey Feature Activity

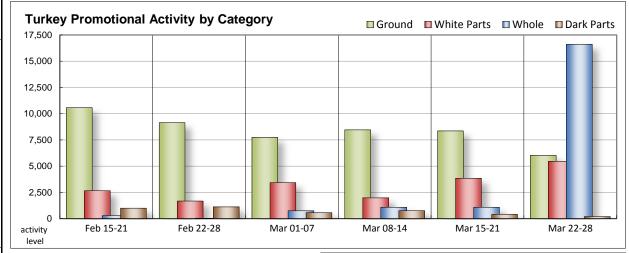
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/22 thru 03/28.

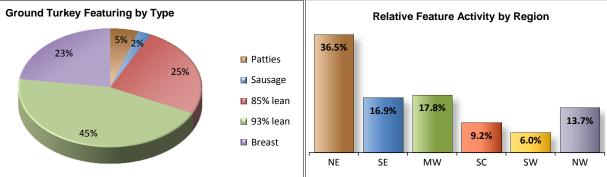
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

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	NAT	IONAL S	UMMA	RY			
	THIS	WEEK	LAST	WEEK	LAST	YEAR	
Feature Rate 1/		of 23,200 tlets		of 23,200 tlets	23.8% of 22,500 outlets		
Special Rate 4/		4%		.8%		6%	
Activity Index 2/		.580		,480		770	
3/		Wtd Avg	Stores	Wtd Avg		Wtd Avg	
WHOLE BIRDS:			-				
Fresh - Hens	2,280	1.64	150	1.71	380	1.75	
" - Toms	2,050		140		150	1.94	
Frozen - Hens	6,330		420	1.20	80	0.97	
" - Toms	5,950	1.03	360	1.17	80	0.97	
PARTS:							
Breast:							
Bone-in, whole							
Fresh	630	2.98	170	3.33	380	2.84	
Frozen	4,060	1.71	2,170	1.63	610	1.84	
Split, bone-in							
Fresh	20	2.49			20	2.94	
Rotisserie	140	8.99	540	6.83	130	8.85	
Boneless, whole	30	3.99	20	4.99			
Cutlets	200	4.72	520	5.15	800	5.46	
Cutlets, thin sliced	310	4.39					
Strips					240	5.45	
Tenders	70	4.82	420	4.79	290	4.86	
Marinated Tenders	260		300		250	4.57	
Drumsticks	40	1.53	90	1.88	490	1.85	
Thighs	10	1.59	110	1.82	280	1.99	
Wings	30		80	1.96	450	1.78	
Necks	10	1.79	50	1.99	210	1.68	
Smoked Drumsticks	50	1.99	20	1.99			
Smoked Wings	50	1.99	20	1.99			
Smoked Necks			20	1.99			
GROUND TURKEY:	6,010	3.35	8,350	3.57	3,870	3.18	
Patties	300	3.68	1,340	3.52	690	3.09	
Sausage	140	3.54	590	3.45	500	3.44	
85% lean	1,500	2.66	1,000	2.81	1,100	2.45	
93% lean	2,700	3.04	3,260	3.21	840	3.04	
Breast	1,370	4.65	2,160	4.74	740	4.56	
Rolls (frsh/frz 1 lb.)	270	2.06	420	2.23	240	2.24	
Specialty 5/							
Patties	10						
93-94% lean	180		60		770	3.85	
Breast	590	5.99	50	6.19	50	5.09	

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

This Week's Turkey Feature Highlights Stores have rolled out their holiday ads and turkeys are basking in the limelight. Fresh and frozen whole turkeys are heavily promoted and prices are lower. This is the week to find kosher whole turkeys; they are actively featured going into the Passover holiday period. If a whole turkey is a bit too much, why not try a bone-in breast? Fresh bone-in breasts are showing up in more ads and prices are lower. Frozen bone-in breasts are heavily promoted; prices are higher. There isn't much interest in featuring rotisserie breasts. Fewer retailers feature boneless white parts; prices are mixed. Dark parts are practically forgotten, with only limited feature activity. Ground turkey promotional activity slows, but there are still plenty of grinds to choose from. Offerings are most active on 93% lean at lower prices. Deli is getting a lot of space in this week's ads. Service deli promotions are more active; offerings increase on processor labels, slow on private labels. Self-service deli items are heavily promoted; prices are mostly lower.





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. Mar 22, 2013

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/22 thru 03/28.

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

	NORTH	HEAST U.S.		SOU [*]	THEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				
	(CT,DE,MA,MD,M		RLVT)		IS,NC,SC,TN,VA	.WV)					
Feature Rate 1/	, , , , , ,	0 sampled outle		, , , , ,	100 sampled ou	,	56.3% of 4,200 sampled outlets 2.6% of stores w/ no-price promotions				
Special Rate 4/	0.6% of stores w	•		·	w/ no-price pro						
Activity Index 2/		ndex = 11,770	, cions		•	ilotions	Activity Index = 5,210 Price Range Summary				
Activity index	Price Range	Summar	2.4	Price Range	y Index = 7,420	non/					
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Summ Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg		
	(φ/ρουπα)	Stores v	viu Avy	(φ/ροαπα)	Stoles	wia Avg	(φ/ροαπα)	Sities	vviu Avg		
WHOLE BIRDS:											
Fresh - Hens	1.29 - 1.99	1,780	1.58	1.29 - 1.59	80	1.36	1.59 - 1.99	420	1.93		
" - Toms	1.29 - 1.99	1,550	1.58	1.29 - 1.59	80	1.36	1.59 - 1.99	420	1.93		
Frozen - Hens	0.99 - 1.59	1,500	1.12	0.88 - 0.99	2,490	0.99	0.69 - 1.49	1,450	1.05		
" - Toms	0.99 - 1.59	1,470	1.10	0.88 - 0.99	2,290	0.99	0.69 - 1.49	1,290	1.07		
PARTS:											
Breast:											
Bone-in, whole											
Fresh	1.39 - 3.49	570	3.03	2.49	20	2.49					
Frozen	1.48 - 2.27	960	1.74	1.39 - 2.27	1,810	1.75	1.49 - 2.49	860	1.62		
Split, bone-in											
Fresh	2.49	20	2.49								
Rotisserie	8.99	10	8.99								
Boneless, whole	3.99	30	3.99								
Cutlets	3.99 - 5.45	130	4.52				4.69 - 5.46	30	5.17		
Cutlets, thin sliced	3.99 - 4.99	310	4.39								
Strips											
Tenders							4.69 - 4.79	30	4.75		
Marinated Tenders	3.73 - 4.26	250	4.13						0		
Drumsticks	1.49	10	1.49				1.29 - 1.79	10	1.56		
Thighs	1.59	10	1.59								
Wings	1.49 - 1.77	10	1.64	1.39	10	1.39	1.29 - 1.79	10	1.56		
Necks							1.79	10	1.79		
Smoked Drumsticks							1.99	10	1.99		
Smoked Wings							1.99	10	1.99		
Smoked Necks											
GROUND TURKEY:											
Patties	3.99	160	3.99	3.00	20	3.00	3.50 - 3.99	10	3.76		
Sausage	2.87 - 3.99	60	3.67	3.99	20	3.99	2.87	10	2.87		
85% lean	2.33 - 3.07	610	2.59	2.00 - 2.99	330	2.43	2.12 - 2.50	120	2.44		
93% lean	2.99 - 3.49	900	3.37	2.99 - 3.49	160	3.30	2.79 - 3.49	130	3.10		
Breast (99-100% lean)	3.99 - 5.99	740	4.90	4.61	40	4.61	4.15 - 4.79	360	4.48		
Rolls (frsh/frz 1 lb.)	1.89	10	1.89								
Specialty 5/											
Patties	5.29	10	5.29								
93-94% lean	3.59 - 4.49	150	3.74				3.99 - 4.49	30	4.32		
Breast	5.99	520	5.99	5.99	70	5.99					



Fri. Mar 22, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/22 thru 03/28.

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

Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
	(AR,AZ,CO,KS	,LA,MO,NM,OK,TX	UT)	((CA,HI,NV)				
	42.4% of 4,2 0.3% of stores v	00 sampled outle w/ no-price promo / Index = 2,690	ts tions	45.4% of 2,9 5.7% of stores Activit	000 sampled outle w/ no-price promo y Index = 1,280		65.2% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,210		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summar Stores V	ry Vtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens " - Toms									
Frozen - Hens " - Toms	0.99 - 1.19 0.99 - 1.19	660 660	0.93 0.93	1.49 1.49	30 30	1.49 1.49	0.99 0.99 - 1.39	200 210	0.99 1.01
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49	20	2.49	2.49	10	2.49	2.69	10	2.69
Frozen	1.49 - 1.89	400	1.65	1.49	20	1.49	1.49	10	1.49
Split, bone-in									
Fresh									
Rotisserie							8.99	130	8.99
Boneless, whole									
Cutlets	3.99 - 4.79	30	4.63				6.35	10	6.35
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.79	30	4.63				5.59	10	5.59
Marinated Tenders							4.39	10	4.39
Drumsticks	1.59	10	1.59	1.49	10	1.49			
Thighs									
Wings									
Necks									
Smoked Drumsticks				1.99	40	1.99			
Smoked Wings				1.99	40	1.99			
Smoked Necks									
GROUND TURKEY:									
Patties	3.00 - 3.49	100	3.27	3.99	10	3.99			
Sausage				3.27	10	3.27	3.27 - 3.60	40	3.36
85% lean	2.00 - 2.79	100	2.47	2.40 - 3.33	280	3.21	2.89	60	2.89
93% lean	2.49 - 3.50	560	2.79	2.79 - 3.19	570	2.80	2.79 - 3.99	380	2.88
Breast (99-100% lean)	4.16	40	4.16	4.15 - 4.79	50	4.30	3.99	140	3.99
Rolls (frsh/frz 1 lb.)	1.49	80	1.49	2.33	180	2.33			
Specialty ^{5/}									
Patties									
93-94% lean									
Breast		ataal. Davitor 9 C		Name (545) 204 4474					



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 22, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/22 thru 03/28.

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

	N	ATIONAL	SUMMAR	Y			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)					
5t B-t- 1/	76.2% o	f 23,200	64.1% o	f 23,200	67.1% o	f 22,500									
Feature Rate 1/	sto	res	sto	res	sto	res	88.3% of 4,600 sampled outlets			76.3% of 6,100 sampled outlets					
Activity Index 2/	47	400	36,	720	20	870			Activity Ind	lex = 15,430		Activity Index = 9,510			
Activity index 2/	47,	400	30,	720	30,	670		Price	Range	Sum	mary	Price	Range	nge Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		(\$/pc	ound)	Stores	Wtd Avg	(\$/pound)		Stores	Wtd Avg
SERVICE DELI - Turkey															
Category 1															
Processor Brand	4,300	8.09	2,740	8.20	,	8.29		6.98		3,450	8.12		- 8.99	220	8.55
Private Brand	1,730	7.41	1,680	7.43	1,050	7.52		6.99	- 7.99	1,020	7.50	6.99	- 7.49	610	7.17
Category 2															
Processor Brand	6,610	6.13	3,320	6.01	3,450	6.13		4.99 -		1,590	5.94		- 6.99	2,430	6.51
Private Brand	2,330	6.86	5,010	7.21	3,780	7.22		5.99 -	6.99	540	6.54	5.99	- 6.49	280	6.48
Category 3															
Processor Brand	1,490	3.99	1,090	4.54	1,150	3.98		3.98 -		400	4.08		3.99	470	3.99
Private Brand	200	5.79	130	4.32	1,400	5.97			5.48	80	5.48				
Turkey Ham	440	4.44	450	0.00	040	0.04		0.00	F 00	400	4.50	5.40	5.00	40	5.70
Processor Brand	410	4.14	450	3.88	310	3.31		2.99 -	5.99	180	4.59	5.49	- 5.99	40	5.73
Private Brand															
Turkey Pastrami	400	4.00	540	4.05	440	4.00		0.00	5.00	0.10	4.54	5 40		40	5 70
Processor Brand	480	4.39	510	4.65	410	4.02		2.99 -	5.99	210	4.51	5.49	- 5.99	40	5.73
Private Brand															
SERVICE DELI - Chicken															
Category 1															
Processor Brand	2,330	7.69	3,070	7.27	2,040	7.41		5.99		1,470	7.96	5.99	- 9.49	120	8.25
Private Brand	1,820	7.05	800	7.41	470	7.53			6.99	1,200	6.99				
Category 2															
Processor Brand	60	5.03	310	5.02	280	6.10		4.99 -	5.99	30	5.44				
Private Brand	10	5.98	170	5.99	10	4.99									
SELF-SERVICE DELI															
(dollars per tub or pouch)															
Turkey 7-10 oz															
Processor Brand	9,210	2.99	6,760	3.05	3,010	3.21		2.50 -		1,830	3.21		- 3.69	2,420	3.19
Private Brand	2,760	3.12	720	3.20	2,810	2.72		2.48 -	3.50	470	3.22	2.69	- 3.49	50	3.38
Turkey 16 oz	4 440	F 60	0.550	F 60	450	5.00		4.00	5.00	700	5.40	F 40	5.00		5 50
Processor Brand	1,440	5.30	2,550	5.02	450	5.09		4.69 -	5.99	700	5.42	5.49	- 5.99	80	5.59
Private Brand	210	4.80	90	4.49			-								
Chicken 7-10 oz	0.040	0.00	0.000	0.00	0.400	0.00		0.50	0.00	4 700	0.00	0.00	0.00	0.700	0.00
Processor Brand	9,240	3.02	6,600	3.06	2,460	3.29		2.50 -		1,780	3.23	2.00		2,700	3.23
Private Brand	2,770	3.12	720	3.21	2,580	2.74		2.48 -	3.50	480	3.21	2.69	- 3.49	50	3.38

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 03/22 thru 03/28.

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

		EST U.S.		H CENTRAL			VEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
Factoria Bata 1/	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,\	VI) (AR,AZ,CO,K	S,LA,MO,NM,C	JK, 1 X, U 1)	(CA,	HI,NV)	(AR,ID,INIT,OR,VVA,VVT)			
Feature Rate 1/	75.9% of 4,200	sampled outlets	74.2% of 4	,200 sampled	outlets	60.8% of 2,900	sampled outlets	75.6% of 1,200 sampled outlets Activity Index = 2,350			
Activity Index 2/	Activity Ir	ndex = 8,500	Activ	ity Index = 7,0	60	Activity In	dex = 4,550				
Addivity mack 27	Price Range Summary			Price Range Summary			Summary	Price Range	Summary		
	(\$/pound)	Stores Wtd Av	g (\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey											
Category 1 Processor Brand	5.99 - 10.49	390 7.2	3 6.99 - 10.	40 450	7.75			7.00 12.00	90 9.89		
Processor Brand Private Brand	6.99 - 8.99	390 7.2 80 7.9			7.75 7.99			7.99 - 12.99	90 9.89		
Category 2	0.99 - 0.99	00 7.8	3 7.9	9 20	7.99						
Processor Brand	4.99 - 6.99	1.490 6.2	0 4.99 - 5.9	9 820	5.55	4.99 - 5.99	250 5.31	4.98 - 5.98	30 5.30		
Private Brand	5.98 - 6.99	470 6.6			6.40	7.99	250 7.99	7.49 - 7.99	330 7.79		
Category 3	0.00 0.00		1.00 0.0		0.10	1.00	200 7.00	7.10 7.00	7.70		
Processor Brand	3.29 - 4.88	160 4.1	2 3.49 - 3.9	9 430	3.94	2.99	30 2.99				
Private Brand				120	5.99						
Turkey Ham											
Processor Brand	3.49 - 5.49	40 4.3	3 2.99 - 3.2	9 60	3.07	2.49 - 3.77	90 3.17				
Private Brand											
Turkey Pastrami											
Processor Brand	3.49 - 5.49	40 4.3	1 3.9	9 190	3.99						
Private Brand											
SERVICE DELI - Chicken											
Category 1											
Processor Brand	5.99 - 9.99	470 6.9	6 5.99 - 10.	99 260	7.18	9.99	10 9.99				
Private Brand	6.98 - 9.99	270 7.1	6.9	9 220	6.99			7.49	130 7.49		
Category 2											
Processor Brand	3.74 - 4.99	20 4.4		9 10	4.99						
Private Brand	5.98	10 5.9	8								
SELF-SERVICE DELI											
(dollars per tub or pouch)											
Turkey 7-10 oz	4.00	4.070			0.70	4.00	4 400 074		500 000		
Processor Brand	1.98 - 3.89	1,970 2.8			2.73	1.98 - 2.99	1,160 2.71	2.28 - 3.99	560 2.93		
Private Brand	2.49 - 2.99	550 2.6	5 2.79 - 3.0	0 770	3.00	2.79 - 3.49	590 3.44	2.79 - 3.49	330 3.46		
Turkey 16 oz Processor Brand	4.48 - 5.00	30 4.8	1 3.69 - 5.0	0 380	4.61	5.99	250 5.99				
Private Brand	3.98	40 3.9		380	4.01	4.99	170 4.99				
Chicken 7-10 oz	3.30	70 3.8				4.33	170 4.33				
Processor Brand	1.98 - 3.89	1,920 2.8	9 1.99 - 2.6	7 1,130	2.79	1.98 - 2.99	1,160 2.71	2.28 - 3.99	550 2.94		
Private Brand	2.49 - 2.99	550 2.6		,	3.00	2.79 - 3.49	590 3.44	2.79 - 3.49	330 3.46		

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)