USDA Weekly Retail Turkey Feature Activity

Fri. Mar 29, 2013

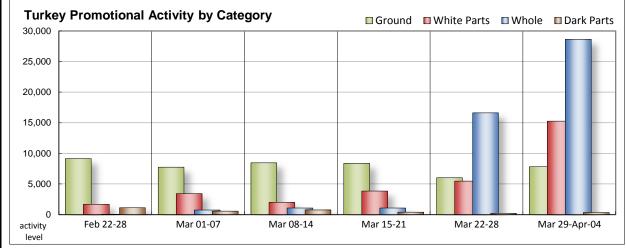
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/29 thru 04/04.

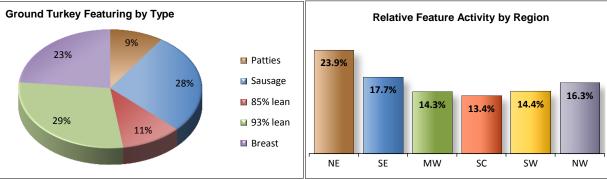
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY														
	THIS WEEK LAST WEEK LAST YEAR													
1/		of 23,200		of 23,200	51.9% of 22,500									
Feature Rate 1/		tlets		lets	outlets									
Special Rate 4/	3.	9%		4%	1.7%									
Activity Index 2/		,810	29,	,580	23,530									
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg								
WHOLE BIRDS:														
Fresh - Hens	7,500	1.63	2,280	1.64	2,230	1.53								
" - Toms	6,650		2,050	1.64	1,840									
Frozen - Hens	7,590		6,330	1.03	3,560	1.12								
" - Toms	6,880	1.04	5,950	1.03	2,890	1.08								
PARTS:														
Breast:														
Bone-in, whole														
Fresh	1,620		630		640									
Frozen	10,220	1.52	4,060	1.71	3,900	1.84								
Split, bone-in			00	0.40	440	0.00								
Fresh	0.000	0.00	20		110	2.99								
Rotisserie	3,300		140	8.99	1,010	8.46								
Boneless, whole	40		30	3.99	220	4.59								
Cutlets	30	5.45	200	4.72	90	5.12								
Cutlets, thin sliced			310	4.39	40	5.49								
Strips														
Tenders	50		70		20	4.99								
Marinated Tenders	300		260	4.14	260	5.38								
Drumsticks	20	1.80	40	1.53	40	1.49								
Thighs			10	1.59	20	1.93								
Wings	40		30	1.53	50	1.39								
Necks	10		10	1.79	10	1.69								
Smoked Drumsticks	110		50	1.99	60	1.96								
Smoked Wings	110		50	1.99	30	1.92								
Smoked Necks	40	_												
GROUND TURKEY:	7,810		6,010	3.35	6,140	3.37								
Patties	740		300	3.68	550	3.60								
Sausage	2,160		140	3.54	320	3.58								
85% lean	830		1,500	2.66	390	2.45								
93% lean	2,250		2,700	3.04	3,110	2.90								
Breast	1,830		1,370	4.65	1,770	4.65								
Rolls (frsh/frz 1 lb.) Specialty 5/	80	1.49	270	2.06	60	2.12								
Patties	10	5.29	10	5.29										
93-94% lean	200		180	3.83	290	3.99								
Breast	200		590		290	5.79								
Note: rolls & specialty no														

This Week's Turkey Feature Highlights

Retail promotional activity surges on turkey for holiday celebrations; this is the last hurrah for whole birds until Thanksgiving. Offerings are very active on fresh and frozen whole turkeys; prices are lower on fresh, higher on frozen. Fresh and frozen bone-in breasts are heavily promoted and provide a good option for shoppers who don't want a whole turkey, and they even cost less this week! Rotisserie breasts are a great choice for the center of the plate, no need to spend hours cooking; prices are sharply lower. With all the bone-in white parts, there is little interest in featuring boneless white parts, mostly marinated tenders at higher prices. Offerings on dark parts focus on smoked drums and wings. Ground turkey market activity increases. Last week there were only a few stores promoting sausage, this week they will be easy to find in the circulars. Deli activity slows; there isn't much interest in deli meats with all the leftovers from holiday meals. Service deli offerings are less active, but the biggest decline is in ads for self-service deli.





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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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/29 thru 04/04.

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

	NORTI	HEAST U.S.			SOUT	HEAST U.S.		MIDWEST U.S.			
	(CT,DE,MA,MD,N	E.NH.NJ.NY.PA.F	RI.VT)	(AL,FL,GA,MS,NC,SC,TN,VA,WV) 92.2% of 6,100 sampled outlets 6.4% of stores w/ no-price promotions				(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 78.6% of 4,200 sampled outlets 3.9% of stores w/ no-price promotions			
Feature Rate 1/	· · · · · · · · · · · · · · · · · · ·	0 sampled outle									
Special Rate 4/	5.0% of stores w	•									
Activity Index 2/		ndex = 14,510	0.47		•		• •				
Activity Index	Price Range	Summar	Activity Index = 14,610 Price Range Summary				Activity Index = 7,870 Price Range Summary				
	(\$/pound)	Stores Wtd Avg			(\$/pound)		y Vtd Avg	(\$/pound)		Wtd Avg	
	(φ/ροατία)	Otores v	via /ivg	(ψ/ρ-	Juliu)	Stores V	viarivg	(φ/ροαπα)	Otoros	vviarivg	
WHOLE BIRDS:											
Fresh - Hens	1.19 - 2.29	2,580	1.62	1.19 -	1.98	880	1.69	1.39 - 1.99	870	1.69	
" - Toms	1.19 - 1.99	2,160	1.55		1.98	680	1.68	1.39 - 1.99	860	1.69	
Frozen - Hens	0.88 - 1.69	1,510	1.24	0.89 -	1.79	2,950	1.02	0.69 - 1.49	1,460	1.10	
" - Toms	0.99 - 1.49	1,070	1.13		1.79	2,820	1.02	0.69 - 1.49	1,350	1.11	
PARTS:											
Breast:											
Bone-in, whole											
Fresh	1.99 - 3.49	630	2.89	2.29	- 2.99	480	2.56	1.99 - 2.69	280	2.47	
Frozen	0.99 - 1.99	1,670	1.60	0.99	- 1.89	4,080	1.49	0.99 - 1.99	2,390	1.54	
Split, bone-in						,			,		
Fresh											
Rotisserie	4.49 - 9.99	1,110	7.31	5.99	- 8.99	650	6.71	8.99 - 9.99	80	9.89	
Boneless, whole	4.99	40	4.99								
Cutlets	5.45	20	5.45					5.45	10	5.45	
Cutlets, thin sliced	00		0.10					0.10		00	
Strips											
Tenders	4.99 - 5.99	40	5.53					4.79	10	4.79	
Marinated Tenders	4.26 - 4.99	280	4.87					4.75	10	4.75	
Drumsticks	1.99	10	1.99					1.39 - 1.79	10	1.61	
Thighs	1.55	10	1.55					1.55 - 1.75	10	1.01	
Wings	1.77 - 2.49	20	2.10		1.69	10	1.69	1.39 - 1.79	10	1.61	
Necks	1.77 - 2.43	20	2.10		1.03	10	1.09	1.39 - 1.79	10	1.61	
Smoked Drumsticks	1.99	80	1.99	1 50	- 2.25	20	1.78	1.55 - 1.75	10	1.01	
Smoked Wings	1.90 - 1.99	80	1.97		- 2.25	30	1.78				
Smoked Necks	1.99	20	1.99	1.00	1.59	20	1.59				
GROUND TURKEY:	1.00	20	1.00		1.00	20	1.00				
Patties	2.99 - 3.50	50	3.41	2 50	- 2.99	480	2.54	2.99 - 3.50	30	3.33	
Sausage	3.03 - 4.39	1,200	3.59		- 3.50	470	2.55	2.87 - 3.49	90	3.08	
85% lean	2.16 - 2.99	100	2.54		- 2.99	480	2.51	2.50	90	2.50	
93% lean	2.68 - 3.84	1,190	3.17		- 3.49	280	3.08	2.80 - 4.00	250	3.56	
Breast (99-100% lean)	3.99 - 5.83	300	4.88		- 5.38	240	4.62	4.00 - 4.79	50	4.20	
Rolls (frsh/frz 1 lb.)	0.00 0.00		1.00	0.00	3.00	2.0		1.00 1.10	30	1.20	
Specialty 5/											
Patties	5.29	10	5.29								
93-94% lean	2.99 - 3.99	180	3.53					3.33	20	3.33	
Breast	5.49	160	5.49		5.49	40	5.49	3.50	20	0.00	
Carrier LICDA Amianternal		hadi Daulimi O C		Na /545\				/AB4C4 O/LDCB4I			



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 03/29 thru 04/04.

(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.				
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)	(0	CA,HI,NV)		(AK,ID,MT,OR,WA,WY) 78.5% of 1,200 sampled outlets 1.2% of stores w/ no-price promotions Activity Index = 2,700			
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	1.9% of stores v	00 sampled outle v/ no-price promo v Index = 7,370	tions	1.4% of stores v	00 sampled outle w/ no-price promo v Index = 5,750	otions				
	Price Range	Summary Stores Wtd Avg		Price Range	Summary Stores With Ave		Price Range		Summary	
	(\$/pound)	Stores V	vta Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	1.29 - 1.59	1,310	1.54	1.49 - 2.89	1,100	1.65	1.49 - 1.98	760	1.64	
" - Toms	1.29 - 1.59	1,180	1.52	1.49 - 2.89	1,090	1.65	1.49 - 1.98	680	1.66	
Frozen - Hens	0.69 - 1.18	850	0.94	0.99 - 1.49	680	1.01	0.79 - 1.39	140	0.82	
" - Toms	0.69 - 0.99	830	0.94	0.99 - 1.49	680	1.01	0.79	130	0.79	
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.49 - 2.79	150	2.51				2.49 - 2.59	80	2.50	
Frozen	0.99 - 1.68	1,370	1.52	0.99 - 1.99	500	1.32	0.99 - 1.98	210	1.55	
Split, bone-in										
Fresh										
Rotisserie	5.99 - 9.99	550	8.93	8.99	560	8.99	7.99 - 9.99	350	9.84	
Boneless, whole										
Cutlets										
Cutlets, thin sliced										
•										
Strips Tenders										
Marinated Tenders							3.32	20	3.32	
							3.32	20	3.32	
Drumsticks										
Thighs										
Wings										
Necks	4.70	40	4.70							
Smoked Drumsticks	1.79	10	1.79							
Smoked Wings										
Smoked Necks										
GROUND TURKEY:	2.50 2.50	470	2.20	2.00	40	2.00				
Patties	2.50 - 3.50	170	3.20	3.99	10	3.99				
Sausage	2.49 - 2.87	200	2.73	3.27 - 3.99	200	3.94				
85% lean	2.30 - 2.49	160	2.41	2.00	200	0.40				
93% lean	2.49 - 2.80	150	2.74	3.00 - 3.19	380	3.18	0.00 4.04	200	4.04	
Breast (99-100% lean)	4.39 - 4.61	360 80	4.60	3.99	550	3.99	3.99 - 4.61	330	4.01	
Rolls (frsh/frz 1 lb.)	1.49	80	1.49							
Specialty ^{5/}										
Patties										
93-94% lean										
Breast							gov/AMSv1 0/LDSMar		3 of	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Mar 29, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/29 thru 04/04.

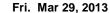
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHE	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,N	C,SC,TN,VA,	WV)			
1/	53.8% o	f 23,200	76.2% o	f 23,200	80.4% o	of 22,500								
Feature Rate 1/	sto	res	sto	res	sto	res	81.2% of 4,600 sampled outlets		50.4% of 6,100 sampled outlets					
Activity Index 2/	25	260	47	400	46	800	Activity Inde	Activity Index = 13,710			Activity Index = 6,580			
Activity index 2/	33,	200	47,		40,	000	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	4,060	8.22	4,300	8.09	3,240	8.18		2,520	8.34	8.99	370	8.99		
Private Brand	1,670	7.49	1,730	7.41	2,450	7.86	6.99 - 8.99	990	7.64	6.99 - 7.49	180	7.29		
Category 2 Processor Brand	5,330	5.95	6.610	6.13	7,620	6.11	4.98 - 6.99	1,280	5.84	4.99 - 6.99	1.080	6.30		
Private Brand	2,540	6.74	2,330	6.86	5,200	6.35	5.99 - 6.99	1,150	6.93	5.99 - 6.49	70	6.43		
Category 3	2,540	0.74	2,550	0.00	3,200	0.55	3.33 - 0.33	1,100	0.55	3.33 · 0.43	70	0.43		
Processor Brand	660	4.38	1.490	3.99	1.270	3.95	3.99 - 4.99	90	4.37	3.99 - 4.99	210	4.57		
Private Brand	20	3.99	200	5.79	., •	0.00	3.99	20	3.99	0.00				
Turkey Ham														
Processor Brand	250	3.36	410	4.14	390	2.88	4.49 - 4.99	50	4.78	2.99 - 3.99	50	3.68		
Private Brand					40	3.98								
Turkey Pastrami														
Processor Brand	60	3.82	480	4.39	340	3.97	3.99	50	3.99					
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	2,510	7.93	2,330	7.69	3,600	7.40	5.98 - 9.49	1,420	8.70	5.49 - 9.49	70	7.57		
Private Brand	1,770	7.20	1,820	7.05	790	7.29	6.99 - 7.99	1,330	7.04	6.99	70	6.99		
Category 2														
Processor Brand	210	5.57	60	5.03	460	6.74	5.99	20	5.99					
Private Brand	70	5.99	10	5.98										
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz	0.040	0.40	0.040	0.00		0.04	0.40	4.530	0.00	4.07	4.000	0.00		
Processor Brand	6,010	3.10	,	2.99	5,690	3.31	2.49 - 3.99	1,570	3.23	1.97 - 3.99	1,980	3.08		
Private Brand Turkey 16 oz	1,440	2.91	2,760	3.12	4,150	2.87	2.50 - 3.33	690	2.70	2.50 - 3.00	280	2.88		
Processor Brand	1,490	4.90	1,440	5.30	2,370	5.15	5.49 - 5.79	370	5.64	5.49	40	5.49		
Priocessor Brand Private Brand	1,490	4.90	210	5.30 4.80	2,310	ა.15	5.45 - 5.78	3/0	5.04	5.49	40	5.49		
Chicken 7-10 oz			210	4.00										
Processor Brand	5,730	3.11	9,240	3.02	5,140	3.35	2.49 - 3.99	1,470	3.25	2.50 - 3.99	1,900	3.10		
Private Brand	1,440	2.91	2,770	3.12	4,050	2.86	2.50 - 3.33	690	2.70	2.50 - 3.00	280	2.88		
a.o Brana	.,		_,	5.12	.,550	50	2.00 0.00	550	=:: 0	2.00 0.00	_50	2.00		

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 03/29 thru 04/04.

(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.	SOUTHV	VEST 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,I	HI,NV)	(AK,ID,MT,	OR,WA,WY)	
Feature Rate 1/	E6 99/ of 4 20/) sampled outlets	45 29/ of 4 20/	0 sampled outlets	26 19/ of 2 000	sampled outlets	29.5% of 1,200 sampled outlets Activity Index = 1,830 Price Range Summary		
		ndex = 6,190	·	ndex = 4,920	·	dex = 2,030			
Activity Index 2/	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	(¢/podria)	Otoroo vitarity	(φ/ροαιία)	Ctoroc Triarity	(φ/ροαπα)	Otoroo Wartig	(ф/родіта)	Ctoroc Triaring	
Category 1									
Processor Brand	6.49 - 9.99	280 7.08	6.99 - 8.49	340 7.87	7.99 - 8.99	20 8.64	6.99 - 7.99	530 7.95	
Private Brand	6.99 - 8.99	350 7.16	6.99 - 7.99	150 7.49					
Category 2									
Processor Brand	4.98 - 6.99	1,080 5.97	4.49 - 6.99	990 5.91	4.99 - 6.99	760 5.55	4.99 - 6.99	140 6.47	
Private Brand	5.98 - 6.99	430 6.15	5.99 - 7.99	700 6.47	7.99	170 7.99	7.99	20 7.99	
Category 3									
Processor Brand	3.95 - 4.79	230 4.47	3.89 - 3.99	80 3.97			3.79 - 3.99	50 3.82	
Private Brand									
Turkey Ham									
Processor Brand	3.58	10 3.58	2.29 - 3.19	30 2.83	2.29 - 2.99	100 2.66	2.99	10 2.99	
Private Brand									
Turkey Pastrami									
Processor Brand							2.99	10 2.99	
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.49 - 7.98	390 6.77	6.99 - 9.49	270 7.97	5.99 - 6.99	350 6.03	10.99	10 10.99	
Private Brand	7.49 - 9.99	170 7.67					7.99	200 7.99	
Category 2									
Processor Brand	3.98 - 5.99	190 5.52							
Private Brand	5.98 - 5.99	70 5.99							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz Processor Brand	4.00 2.00	1 100 2 06	1.00 0.60	1 020 2 04	2.00 2.00	190 3.11	2.50 2.00	140 224	
Private Brand	1.98 - 3.98 2.50 - 3.00	1,100 3.06 180 2.54	1.99 - 2.69 2.88	1,030 2.94 90 2.88	2.99 - 3.99	190 3.11	2.50 - 3.99 3.99	140 3.24 200 3.99	
Turkey 16 oz	2.30 - 3.00	100 2.54	2.08	90 2.00			3.99	200 3.99	
Processor Brand	3.99 - 5.00	460 4.55	3.99 - 5.00	170 4.16	3.99	250 3.99	5.99	200 5.99	
Private Brand	3.33 - 3.00	7.00	3.33 = 3.00	170 4.10	3.39	200 0.09	0.09	200 0.99	
Chicken 7-10 oz						1			
Processor Brand	1.98 - 3.98	1,070 3.07	1.99 - 2.69	980 2.94	2.99 - 3.99	190 3.11	2.98 - 3.99	120 3.38	
Private Brand	2.50 - 3.00	180 2.54	2.88	90 2.88	2.55 0.55		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)