

USDA Weekly Retail Turkey Feature Activity

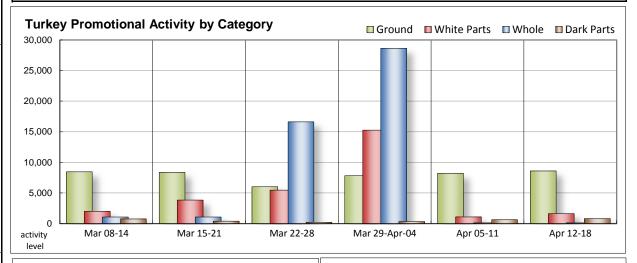
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/12 thru 04/18.

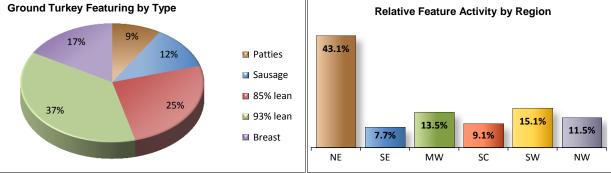
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY												
	i	WEEK	LAST YEAR									
Feature Rate 1/	38.8% ou	WEEK of 23,200 tlets	33.9% ou	of 23,200 tlets	31.4% of 22,500 outlets 0.2%							
Special Rate 4/		5%		3%								
Activity Index 2/		,830		,910	11,480							
3/	Stores Wtd Avg		Stores Wtd Avg		Stores	Wtd Avg						
WHOLE BIRDS:					400	4.00						
Fresh - Hens					160							
- 101115	00	0.55	440	0.00	160	1.63						
Frozen - Hens	80		110	0.99								
" - Toms PARTS:	30	1.49										
Breast:												
Bone-in, whole												
Fresh	250	2.96	10	2.99	160	2.75						
Frozen	370		320		350							
Split, bone-in	370	1.75	320	2.04	330	1.04						
Fresh			10	2.99								
Rotisserie	430	8.36	200		350	7.77						
Boneless, whole	10		40		670							
Cutlets	440		80		990							
Cutlets, thin sliced	110	0.00	00	0.70	330	4.40						
·			130	4.00								
Strips	400	2.00			040	4.40						
Tenders Marinated Tenders	120 70		290 300		910 700							
Drumsticks	170		80		50							
Thighs	170		60	-	20							
Wings	160		20		130							
Necks	60		20	1.55	100							
Smoked Drumsticks	160		190	2.02	100							
Smoked Wings	180		260		100							
Smoked Necks	70	_	200		90							
GROUND TURKEY:	8,590		8,210		6,210							
Patties	750		650		500							
Sausage	1,010		1,610		1,020							
85% lean	2,190		2,650		1,380							
93% lean	3,210		2,500		1,920							
Breast	1,430		800		1,390							
Rolls (frsh/frz 1 lb.)	490		320		50							
Specialty 5/												
Patties	300	4.83	140	4.73	200	4.11						
93-94% lean	810	4.04	1,110	3.78	60	5.63						
Breast	30	5.82	10	6.99	10	5.39						
Note: rolls & specialty no	t included	l in ground	turkey tota	al and weigl	hted avera	age.						

This Week's Turkey Feature Highlights

Retail feature activity increases going into the middle of the month. Retailers show little interest in promoting whole turkeys, preferring to feature bone-in breasts. Offerings increase on rotisserie breasts; prices are higher. Boneless white parts are offered at mostly lower prices; cutlets are the most prominent white part in this week's circulars. Dark parts are fully represented and almost evenly divided between fresh parts and smoked parts; prices are mixed. Feature activity increases on ground turkey; the weighted average price is higher. The 93% lean continues to be the most actively promoted grind. Retailers increase offerings on deli items. Service deli promotions increase on thin slicing turkey and whole muscle chicken. There is a large increase in the volume of self-service deli offered; advertised prices are lower on processor label product, higher on private label items. It may not feel like spring in some parts of the country, but warmer weather will surely come our way soon and we can start grilling again.





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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Fri. Apr 12, 2013

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

	NORT	HEAST U.S.		SOUT	HEAST U.S.	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 26.7% of 4,200 sampled outlets				
	(CT,DE,MA,MD,M	1E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W					
Feature Rate 1/	 	00 sampled outle			00 sampled outle					
Special Rate 4/	1.7% of stores w	// no-price promo	tions	1.5% of stores	w/ no-price promo	tions	0.3% of stores w/ no-price promotions Activity Index = 1,810			
Activity Index 2/		Index = 6,340			/ Index = 1,550					
ricinny index	Price Range	Summar	Price Range	• • • • • • • • • • • • • • • • • • • •			Price Range Summary			
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens				0.55	50	0.55	0.55	20	0.55	
" - Toms							1.49	30	1.49	
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.49 - 2.99	230	2.96	2.99	20	2.99				
Frozen	1.39	10	1.39	1.59	70	1.59	1.49	90	1.49	
Split, bone-in										
Fresh										
Rotisserie	4.99 - 9.99	410	8.37				8.09	20	8.09	
Boneless, whole	4.99	10	4.99							
Cutlets	3.99 - 5.79	290	5.31	5.79	20	5.79	3.98	10	3.98	
Cutlets, thin sliced										
Strips										
Tenders	3.99	50	3.99				3.98	10	3.98	
Marinated Tenders	3.99	40	3.99				4.53	20	4.53	
Drumsticks	1.29 - 1.99	100	1.68	1.79	50	1.79	1.29	10	1.29	
Thighs	1.99	10	1.99	•		0	0		0	
Wings	1.29 - 1.99	100	1.68	1.79	50	1.79	1.29	10	1.29	
Necks	1.20			1.79	50	1.79	1.29	10	1.29	
Smoked Drumsticks	1.99 - 2.49	70	2.04	2.19 - 2.29	50	2.21				
Smoked Wings	1.99 - 2.49	90	2.04	2.19 - 2.29	50	2.21				
Smoked Necks	1.99	20	1.99	1.79 - 2.29	50	1.88				
GROUND TURKEY:				-						
Patties	3.29 - 5.49	200	3.74	3.00 - 3.29	60	3.22	2.99 - 4.29	150	3.43	
Sausage	2.87 - 3.99	540	3.56	3.99	10	3.99	2.86 - 3.50	130	3.42	
85% lean	1.99 - 3.33	920	2.69	2.00 - 2.99	380	2.68	2.49 - 3.00	380	2.69	
93% lean	2.68 - 4.99	2,270	3.45	2.49	210	2.49	3.07 - 3.69	90	3.24	
Breast (99-100% lean)	3.84 - 4.99	510	4.60	3.84 - 4.39	300	4.03	4.49	180	4.49	
Rolls (frsh/frz 1 lb.)							1.99 - 2.79	140	2.70	
Specialty ^{5/}										
Patties	3.99 - 4.99	300	4.83							
93-94% lean	2.99 - 5.49	170	3.75	3.50 - 3.99	130	3.53	3.99 - 4.99	500	4.27	
Breast							6.99	10	6.99	



USDA Weekly Retail Turkey Feature Activity

Fri. Apr 12, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/12 thru 04/18.

(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) 57.3% of 1,200 sampled outlets 25.3% of stores w/ no-price promotions Activity Index = 460			
	(AR,AZ,CO,KS	,LA,MO,NM,OK,TX	,UT)	(0	CA,HI,NV)					
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	0.0% of stores v	200 sampled outle w/ no-price promo y Index = 1,210	tions	18.7% of stores Activity	00 sampled outle w/ no-price promo v Index = 1,460	otions				
	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				0.55	10	0.55				
" - Toms				0.00		0.00				
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.49 - 1.99	190	1.89				1.99	10	1.99	
Split, bone-in										
Fresh										
Rotisserie										
Boneless, whole										
Cutlets	3.99 - 4.49	120	4.30							
Cutlets, thin sliced										
Strips										
Tenders	3.49 - 3.99	60	3.86							
Marinated Tenders							4.33	10	4.33	
Drumsticks							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	3.49	60	3.49	3.49 - 3.99	280	3.97				
Sausage	2.99 - 3.88	40	3.32	3.27	270	3.27	3.27	20	3.27	
85% lean	1.99 - 2.88	90	2.74	1.99 - 2.66	350	2.32	2.00 - 3.00	70	2.85	
93% lean	2.59	20	2.59	2.78 - 3.99	360	3.24	3.19 - 3.20	260	3.19	
Breast (99-100% lean)	4.16 - 5.59	400	5.21	5.59	40	5.59				
Rolls (frsh/frz 1 lb.)	1.99 - 3.49	230	2.54	0.99 - 2.99	60	2.28	0.99 - 2.99	60	1.51	
Specialty ^{5/}										
Patties										
93-94% lean				4.00	40	4.00	3.99	10	3.99	
Breast				4.99	10	4.99	5.49	10	5.49	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Apr 12, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/12 thru 04/18.

(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)				
1/	75.2% o	f 23,200	76.3% o	f 23,200	77.9% o	f 22,500							
Feature Rate 1/	sto	res	sto	res	sto	res	86.5% of 4,600	86.5% of 4,600 sampled outlets		82.6% of 6,100 sampled outlets			
Activity Index 2/	E4 :	170	42,	940	42	150	Activity In	dex = 15,900		Activity In	dex = 8,980		
Activity Index 2/	51,	170	42,0	040	43,	150	Price Range	Summa	ary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores V	Ntd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey													
Category 1							.						
Processor Brand	3,840	8.08	6,510	8.41	4,840	8.14		1,430	8.24	7.99 - 8.99	850	8.48	
Private Brand	2,850	7.61	1,420	7.95	2,680	7.03	6.98 - 8.99	1,910	7.67	7.49	210	7.49	
Category 2 Processor Brand	4,920	5.90	4,080	6.11	3,810	6.20	4.98 - 6.99	1,740	5.86	4.99 - 6.99	790	6.18	
Private Brand	7,200	5.90 7.47	3.100	6.63	4,520	6.89		2,240	6.93	4.99 - 6.99 5.99 - 7.99	790	6.27	
Category 3	7,200	7.47	3,100	0.03	4,320	0.09	5.99 - 7.99	2,240	0.93	5.99 - 7.99	170	0.27	
Processor Brand	920	4.11	660	3.90	1,110	3.95	2.99 - 4.99	350	4.22	3.99 - 4.99	160	4.13	
Private Brand	230	4.55	1,820	4.98	1,340	5.62		90	3.99	0.00 4.00	100	4.10	
Turkey Ham	200	1.00	1,020	1.00	1,010	0.02			0.00				
Processor Brand	480	4.08	580	3.71	600	3.48	3.49 - 5.99	390	4.17	5.99	20	5.99	
Private Brand													
Turkey Pastrami													
Processor Brand	580	4.45	580	4.16	380	4.14	3.69 - 5.99	380	4.41	5.99	20	5.99	
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,810	7.41	2,730	7.70	5,190	7.26	5.99 - 8.99	1,280	7.64	6.99 - 8.99	310	8.31	
Private Brand	1,080	8.00	430	6.99	570	6.85	5.99 - 8.49	860	7.92	8.99	70	8.99	
Category 2													
Processor Brand	70	5.24	390	5.42	90	4.70	4.97 - 5.99	20	5.31				
Private Brand	260	5.87	1,630	5.22	610	5.81	1						
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	9,890	2.85	9,150	3.00	· ·	2.92		1,830	3.07	2.00 - 3.99	2,660	2.88	
Private Brand	2,280	3.18	200	2.82	1,910	2.64	2.50 - 3.49	720	2.65	2.50 - 3.50	110	2.91	
Turkey 16 oz	4.700		000	4.6.4	770			400	5.00	5.00	070	5.00	
Processor Brand	1,700	5.51	290	4.34	770	5.41	5.99	130	5.99	5.99	270	5.99	
Private Brand													
Chicken 7-10 oz Processor Brand	9,800	2.85	9.070	3.00	E 740	2.00	2 2.33 - 3.99	1.830	2.07	2.00 - 3.99	2,630	2.88	
Processor Brand Private Brand	9,800 2,260	2.85 3.18	200	3.00 2.82	-, -	2.92 2.64		1,830 700	3.07 2.64	2.50 - 3.50 2.50 - 3.50	2,630	2.88	
Private Brand	۷,۷۵۷	3.18	200	2.02	1,910	2.04	1 2.50 - 3.49	700	∠.04	2.30 - 3.30	110	2.91	

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 04/12 thru 04/18.

(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. (AK,ID,MT,OR,WA,WY) 72.2% of 1,200 sampled outlets		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,H	II,NV)			
Feature Rate 1/									
		0 sampled outlets	· ·	sampled outlets	74.2% of 2,900 s	•			
Activity Index 2/		ndex = 9,990		ndex = 5,690	Activity Ind		Activity Index = 2,880		
	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range	Summary	
SERVICE DELI - Turkey	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	
Category 1									
Processor Brand	5.99 - 8.79	860 7.18	6.49 - 8.99	480 8.47	5.49 - 10.99	200 8.03	7.99 - 12.99	20 10.85	
Private Brand	6.49 - 9.99	580 7.51	6.99 - 7.99	150 7.49	3.49 - 10.99	200 0.03	7.99 - 12.99	20 10.03	
Category 2	0.40 - 0.00	300 7.51	0.55 - 7.55	130 7.43					
Processor Brand	4.98 - 6.99	1,120 5.93	4.99 - 6.99	430 5.31	5.99	590 5.99	5.98 - 5.99	250 5.99	
Private Brand	4.99 - 7.99	550 6.60	4.99 - 7.99	730 7.84	7.99 - 8.99	1,930 8.43	7.99	980 7.99	
Category 3						,			
Processor Brand	3.98 - 4.98	170 4.40	3.49 - 3.99	220 3.66	3.98	10 3.98	4.99	10 4.99	
Private Brand				10 3.99	4.99	130 4.99			
Turkey Ham									
Processor Brand	3.58 - 3.98	20 3.74			2.29 - 2.99	50 2.70			
Private Brand									
Turkey Pastrami									
Processor Brand	3.49 - 5.98	150 4.43	3.99	30 3.99					
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.98 - 9.99	700 6.82	6.99 - 8.79	410 7.04	6.99 - 8.99	110 7.24			
Private Brand	6.99 - 7.99	130 7.89	8.49	20 8.49					
Category 2									
Processor Brand	3.98 - 5.99	50 5.21							
Private Brand	4.99 - 5.99	230 5.86	5.99	30 5.99					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz	4.00 0.00	4.000 0.77	4.00 0.50	4.040 0.00	0.00 0.00	4.000 0.00	0.40 0.00	510 2.72	
Processor Brand Private Brand	1.98 - 3.99	1,980 2.77 430 2.86	1.99 - 2.50 3.00	1,310 2.62 190 3.00	2.33 - 3.99 3.99	1,600 2.86 630 3.99	2.49 - 3.33 3.50		
Turkey 16 oz	2.56 - 2.99	430 2.00	3.00	190 3.00	3.99	630 3.99	3.50	200 3.50	
Processor Brand	3.99 - 5.79	650 5.03	4.99	200 4.99	5.99	250 5.99	5.99	200 5.99	
Private Brand	3.00 0.70	0.00	4.55	200 4.00	0.55	200 0.00	0.00	200 0.00	
Chicken 7-10 oz								-	
Processor Brand	1.98 - 3.99	1,940 2.76	1.99 - 2.49	1,290 2.62	2.33 - 3.99	1,600 2.86	2.49 - 3.33	510 2.72	
Private Brand	2.56 - 2.99	430 2.86	3.00	190 3.00	3.99	630 3.99	3.50	200 3.50	
1 Tivate Brand	2.00 2.00	100 2.00	1 0.00	100 0.00	0.00	0.00	0.00	200 0.00	

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)