



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/10 thru 05/16.

Fri. May 10, 2013

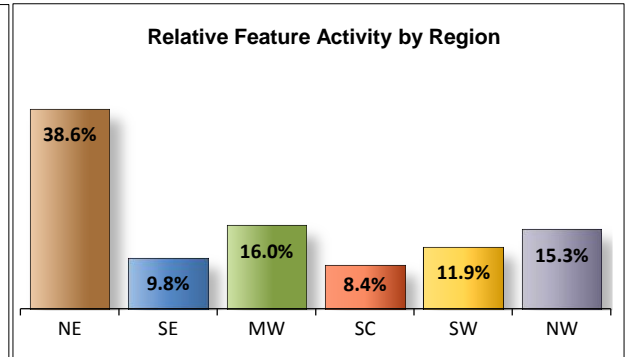
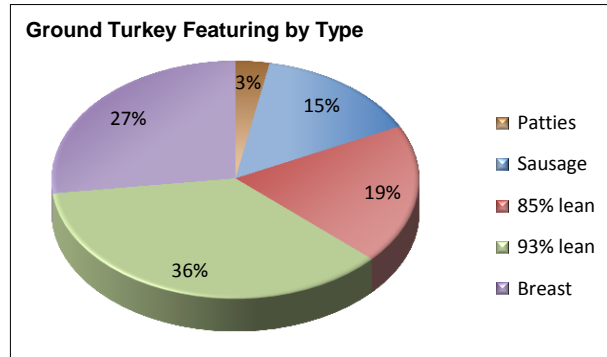
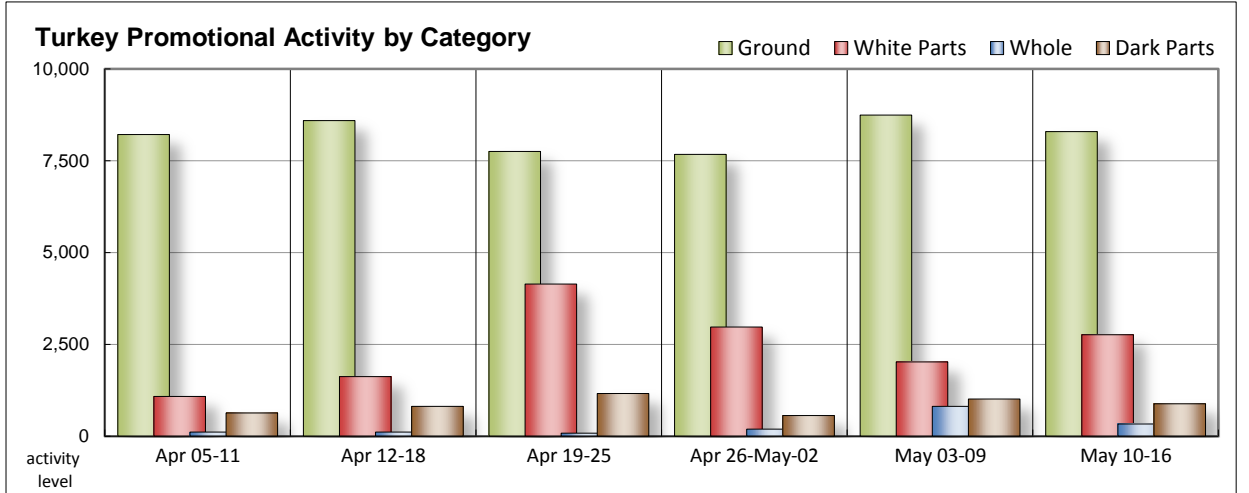
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	39.3% of 23,200 outlets		38.5% of 23,200 outlets		36.0% of 22,500 outlets	
Special Rate ^{4/}	1.4%		0.5%		0.0%	
Activity Index ^{2/}	13,610		14,410		13,590	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					10	1.59
" - Toms						
Frozen - Hens	260	1.04	470	1.33	100	1.00
" - Toms	70	1.33	340	1.27	310	1.19
PARTS:						
Breast:						
Bone-in, whole						
Fresh	170	2.75	30	2.49	50	2.26
Frozen	920	1.66	620	1.81	950	1.72
Split, bone-in						
Fresh			20	2.99	200	2.99
Rotisserie	220	7.80	570	7.94	480	7.55
Boneless, whole	90	5.02	100	4.71	400	3.99
Cutlets	990	5.01	290	4.04	1,240	4.57
Cutlets, thin sliced	170	4.99	100	4.99	20	4.49
Strips	170	4.99			20	4.49
Tenders	30	3.98	290	4.33	1,070	4.43
Marinated Tenders	650	4.52	520	4.39	360	4.30
Drumsticks	100	1.55	300	1.93	40	1.65
Thighs	130	1.90	250	2.08	30	1.96
Wings	50	1.82	260	1.97	60	1.51
Necks	10	1.29	10	1.29		
Smoked Drumsticks	210	2.18	20	1.99	10	2.25
Smoked Wings	200	2.01	90	1.91	70	1.99
Smoked Necks	180	1.99	80	1.99	30	2.08
GROUND TURKEY:	8,290	3.51	8,740	3.32	7,710	3.53
Patties	250	3.56	530	3.87	540	3.73
Sausage	1,220	3.52	2,380	3.43	790	3.29
85% lean	1,580	2.65	1,160	2.63	1,230	2.97
93% lean	3,000	3.31	3,960	3.19	2,460	3.07
Breast	2,240	4.62	710	4.43	2,690	4.32
Rolls (frsh/frz 1 lb.)	140	2.14	40	2.26	200	2.73
Specialty ^{5/}						
Patties	20	4.68	20	4.19	30	6.65
93-94% lean	450	4.50	1,230	4.02	190	4.24
Breast	90	5.79	20	5.99	10	6.99

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

This Week's Turkey Feature Highlights

Retail promotional activity slows as turkey competes with Mother's Day promotions. Fewer stores offer frozen hens and toms; hen prices are lower. Offerings increase on fresh and frozen bone-in breasts; values increase on fresh, decline on frozen. Featuring slows on rotisserie breasts. Retailers are giving boneless white parts more space in this week's circulars. Most ads focus on cutlets and marinated tenders at higher prices. Last week the ads focused on fresh dark parts; this week the smoked parts get more ad space. Grinds are less active; featuring is most active on 93% lean and ground breast. Feature activity increases on both service and self-service deli. Service deli offerings slow on whole muscle meats, increase on reformed muscle meats and on value products. Self-service deli featuring increases on processor brands; prices decline. The opposite is true for self-service private brands; fewer ads at higher prices. Deli platters should be popular for graduation celebrations this weekend.



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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(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/}	64.4% of 4,600 sampled outlets			30.8% of 6,100 sampled outlets			40.2% of 4,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			7.8% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,100			Activity Index = 2,110			Activity Index = 2,300		
	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				0.99	80	0.99	0.99	100	0.99
" - Toms							1.79	30	1.79
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49 - 2.99	130	2.76	2.99	20	2.99			
Frozen	1.99	170	1.99	1.17 - 1.59	370	1.46	1.49 - 1.99	280	1.66
Split, bone-in									
Fresh									
Rotisserie	7.04 - 8.99	90	7.52						
Boneless, whole									
Cutlets	4.99 - 5.99	730	5.19	4.99	20	4.99	4.49	170	4.49
Cutlets, thin sliced	4.99	170	4.99	5.99	20	5.99			
Strips	4.99	170	4.99						
Tenders									
Marinated Tenders	4.26 - 4.79	290	4.57				4.66 - 5.33	150	4.88
Drumsticks	1.69 - 1.99	30	1.83	1.49	40	1.49	1.29	10	1.29
Thighs	1.99 - 2.49	30	2.26				1.79	100	1.79
Wings	1.78 - 1.99	40	1.96				1.29	10	1.29
Necks							1.29	10	1.29
Smoked Drumsticks	2.19 - 2.49	190	2.20				1.99	10	1.99
Smoked Wings	1.99 - 2.49	190	2.01				1.99	10	1.99
Smoked Necks	1.99	180	1.99						
GROUND TURKEY:									
Patties				3.29 - 3.50	60	3.46	3.33 - 3.99	140	3.52
Sausage	3.07 - 3.99	690	3.60	3.07	40	3.07	2.79 - 3.84	470	3.46
85% lean	2.33 - 3.06	890	2.67	2.33 - 2.99	290	2.56	2.50 - 3.19	140	2.59
93% lean	2.69 - 3.84	1,230	3.32	2.69 - 3.49	1,160	3.43	2.58 - 3.49	310	2.73
Breast (99-100% lean)	4.61 - 4.99	320	4.62				3.78 - 4.79	270	4.76
Rolls (frsh/frz 1 lb.)							1.99	60	1.99
Specialty ^{5/}									
Patties	3.99 - 4.99	20	4.68						
93-94% lean	2.99 - 5.49	420	4.52				4.29	20	4.29
Breast	5.49 - 6.99	50	6.24	5.49	10	5.49	5.49	10	5.49



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	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/}	22.6% of 4,200 sampled outlets			37.0% of 2,900 sampled outlets			46.0% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,200			Activity Index = 1,240			Activity Index = 660		
	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	0.99 - 1.29	80	1.14						
" - Toms	0.99	40	0.99						
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49	20	2.49				1.68 - 1.99	30	1.80
Frozen	1.79	70	1.79						
Split, bone-in									
Fresh									
Rotisserie				7.99	130	7.99			
Boneless, whole									
Cutlets	4.49	40	4.49				3.69	30	3.69
Cutlets, thin sliced									
Strips									
Tenders	3.98	30	3.98						
Marinated Tenders	3.99	80	3.99	3.99	70	3.99	4.66	60	4.66
Drumsticks									
Thighs	1.39	20	1.39						
Wings									
Necks									
Smoked Drumsticks	1.99	10	1.99						
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.69 - 3.99	50	3.77			
Sausage	2.71	10	2.71	3.27	10	3.27			
85% lean	1.99 - 2.99	60	2.70	2.66	170	2.66	2.70 - 2.79	30	2.73
93% lean	3.16 - 3.50	110	3.26	2.95 - 3.99	170	3.48	3.19	20	3.19
Breast (99-100% lean)	3.99 - 4.79	550	4.55	3.99 - 4.79	630	4.70	3.27 - 4.79	470	4.51
Rolls (frsh/frz 1 lb.)	1.50 - 2.58	80	2.26						
Specialty ^{5/}									
Patties									
93-94% lean				4.99	10	4.99	3.98	10	3.98
Breast							4.98	10	4.98



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 05/10 thru 05/16.

(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		83.5% of 4,600 sampled outlets Activity Index = 15,410			73.1% of 6,100 sampled outlets Activity Index = 13,670		
Feature Rate ^{1/}	69.9% of 23,200 stores		70.0% of 23,200 stores		60.9% of 22,500 stores							
Activity Index ^{2/}	47,610		41,190		37,900							
	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	5,010	8.23	5,260	8.54	4,140	8.06	6.98 - 9.99	2,060	8.34	6.99 - 8.99	810	8.56
Private Brand	760	7.27	2,190	7.80	3,510	7.42	6.99 - 8.49	320	7.11	7.49	110	7.49
Category 2												
Processor Brand	3,920	5.89	5,090	5.84	3,920	5.98	4.99 - 7.57	1,580	5.88	5.99 - 6.99	530	6.27
Private Brand	6,650	7.29	3,050	7.19	4,340	6.69	4.99 - 7.99	2,690	6.59	4.99 - 7.99	850	6.74
Category 3												
Processor Brand	1,470	3.97	960	4.00	1,180	3.82	2.99 - 4.99	410	4.10	3.98 - 3.99	120	3.99
Private Brand	1,300	4.97	40	5.48	60	3.65	3.99 - 4.99	130	4.86	4.99	1,150	4.99
Turkey Ham												
Processor Brand	530	3.40	460	3.00	270	3.54	2.99 - 4.99	260	3.34	3.49 - 3.69	50	3.62
Private Brand												
Turkey Pastrami												
Processor Brand	310	3.69	90	6.97	370	4.36	3.49 - 3.99	240	3.59	3.69	30	3.69
Private Brand			10	3.79								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,630	7.71	3,840	7.58	3,610	6.81	5.98 - 9.99	1,800	7.97	6.99 - 8.99	310	7.95
Private Brand	1,300	6.65	1,310	7.11	2,210	6.62	5.99 - 6.99	480	6.51	6.99	440	6.99
Category 2												
Processor Brand	380	5.11	100	4.79	260	6.25	4.99 - 5.99	350	5.12			
Private Brand	1,460	5.13	50	5.99			4.99	110	4.99	4.99	1,140	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,920	3.11	4,800	3.15	6,310	3.39	2.50 - 4.00	1,610	3.24	2.00 - 3.99	3,560	3.15
Private Brand	1,840	3.30	2,670	2.53	350	3.08	2.50 - 2.99	820	2.68	3.99	400	3.99
Turkey 16 oz												
Processor Brand	1,020	5.21	3,820	5.15	1,190	5.48	3.69 - 5.99	280	5.07	3.99 - 5.99	270	5.82
Private Brand												
Chicken 7-10 oz												
Processor Brand	8,270	3.14	4,780	3.15	5,830	3.41	2.50 - 4.00	1,450	3.28	2.00 - 3.99	3,500	3.16
Private Brand	1,840	3.30	2,670	2.63	350	3.08	2.50 - 2.99	820	2.68	3.99	400	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)



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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)		
	66.3% of 4,200 sampled outlets			60.8% of 4,200 sampled outlets			56.6% of 2,900 sampled outlets			76.3% of 1,200 sampled outlets		
	Activity Index = 8,070			Activity Index = 5,730			Activity Index = 3,390			Activity Index = 1,340		
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 - 8.99	610	7.64	5.99 - 8.49	920	8.02	7.99 - 8.99	330	8.42	6.99 - 12.99	280	8.29
Private Brand	6.99 - 10.99	210	7.58	6.99	120	6.99						
Category 2												
Processor Brand	4.98 - 6.99	980	5.89	4.49 - 5.98	580	5.81	4.99 - 5.99	240	5.30	4.99	10	4.99
Private Brand	4.99 - 7.99	590	6.44	5.99 - 7.99	770	7.85	7.99 - 8.99	1,100	8.50	7.99 - 8.99	650	8.96
Category 3												
Processor Brand	2.95 - 4.49	460	3.79	3.98 - 4.29	180	4.01	3.49 - 3.99	260	3.87	3.99 - 5.97	40	5.27
Private Brand	3.99 - 4.99	20	4.66									
Turkey Ham												
Processor Brand	2.98 - 3.69	20	3.34	2.99	10	2.99	2.49 - 3.99	190	3.45			
Private Brand												
Turkey Pastrami												
Processor Brand	2.98 - 5.99	30	4.22	4.49	10	4.49						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 8.99	340	6.30	5.49 - 7.99	180	7.43						
Private Brand	5.98 - 9.99	160	6.40	5.99 - 6.99	220	6.44						
Category 2												
Processor Brand	4.99	30	4.99									
Private Brand	4.99 - 5.99	180	5.93	5.99	30	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.89	1,550	2.94	1.99 - 2.69	1,450	2.94	3.00 - 3.50	550	3.46	2.50 - 3.50	200	3.07
Private Brand	2.50 - 3.99	620	3.69									
Turkey 16 oz												
Processor Brand	3.88 - 4.99	270	4.92	4.99	30	4.99	4.99	170	4.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.89	1,380	2.95	1.99 - 2.98	1,230	2.94	3.00 - 3.50	550	3.46	2.98 - 3.50	160	3.23
Private Brand	2.50 - 3.99	620	3.69									

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)