

#### **USDA Weekly Retail Turkey Feature Activity**

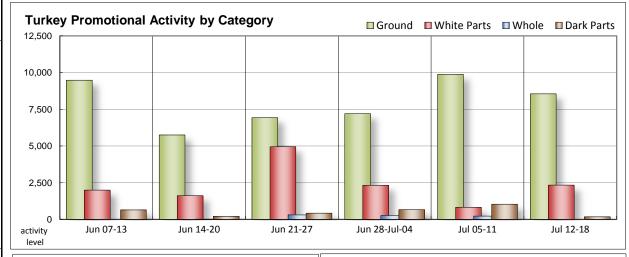
## Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/12 thru 07/18.

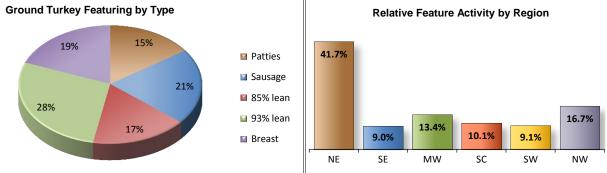
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted)												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST	YEAR						
Feature Rate 1/	42.9%	of 23,200	40.1%	of 23,200	39.2% of 22,500 outlets 2.5%							
reature Kate	ou	tlets	ou	tlets								
Special Rate 4/	5.	.4%	5.	.3%								
Activity Index 2/	13	,400	12	,750	12	,000						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens			30	1.69	10	1.59						
" - Toms			30	1.69								
Frozen - Hens			170	0.99	10	0.99						
" - Toms					10	0.99						
PARTS:												
Breast:												
Bone-in, whole												
Fresh	30				10							
Frozen	180	1.47	350	1.66	840	1.61						
Split, bone-in												
Fresh					10							
Rotisserie	610	_			330	7.59						
Boneless, whole	90	5.36										
Cutlets	570	5.14	370	5.28	230	4.91						
Cutlets, thin sliced	100	4.99			90	4.99						
Strips	300	4.81										
Tenders	460	4.75	100	4.39	290	4.85						
Marinated Tenders	1,430	4.31	400	4.60	570	3.89						
Drumsticks	10	1.29	170	1.47	100	1.98						
Thighs			100	1.79	40	2.39						
Wings	20	1.74	150	2.36	30	1.66						
Necks	10	1.29	10	1.29	40	1.18						
Smoked Drumsticks	50	1.95	210	2.24	30	1.78						
Smoked Wings	50	1.95	160	1.81	70	1.79						
Smoked Necks	40	1.94	240	1.76	50	1.86						
GROUND TURKEY:	8,550		9,870		8,830							
Patties	1,310		1,450		530							
Sausage	1,780		1,380		1,820							
85% lean	1,440		3,710		2,160							
93% lean	2,390		2,640		2,430							
Breast	1,630		690		1,890							
Rolls (frsh/frz 1 lb.)	260	2.49	140	1.96	210	2.27						
Specialty 5/	_		_		_							
Patties	90		30		20							
93-94% lean	490		160		160							
Breast	60				20	5.79						
Note: rolls & specialty no	or included	ı iri ground	turkey tota	ai and weigi	nied avera	ige.						

This Week's Turkey Feature Highlights

Retailers continue to show more turkey items in the weekly circulars. Whole turkeys disappear from this week's ads. Offerings on bone-in breasts are also getting harder to find, although prices on frozen bone-in breast are lower where they are promoted. Rotisserie breasts are back in the adverts; they provide a good alternative to cooking in the summer heat. For people looking to grill, stores are offering a full array of boneless white parts. Marinated tenders are heavily promoted and prices are sharply lower; what could be easier than throwing one or two on the grill? Fewer stores offer dark parts; prices are mixed. Featuring slows on ground turkey; the weighted average price is higher due to fewer ads on 85% lean and increased promotions for ground breast. Prices trend lower on all the ground items. Deli feature activity slows on both service deli and self-service deli. Stores are promoting more service deli thin slicing meats. The increase in offerings on self-service private brands is more than offset by the decline in offerings on processor brands. Prices are higher on processor brands, lower on private brands.





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.



# **USDA Weekly Retail Turkey Feature Activity**

Fri. Jul 12, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/12 thru 07/18.

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

	NORTH	IEAST U.S.		SOUT	THEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  31.9% of 4,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 1,900			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	′V)				
Feature Rate <sup>1/</sup> Special Rate <sup>4/</sup> Activity Index <sup>2/</sup>	0.4% of stores w	Index = 6,500	tions	0.0% of stores Activit	00 sampled outle w/ no-price promo y Index = 1,920	tions				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.79	10	2.79	
Frozen	1.79	20	1.79	1.19 - 1.49	70	1.25	1.49 - 1.79	50	1.53	
Split, bone-in										
Fresh										
Rotisserie	5.00 - 9.99	360	7.61							
Boneless, whole	3.99 - 5.99	70	5.18	5.99	20	5.99				
Cutlets	4.99 - 5.99	530	5.08	5.99	20	5.99				
Cutlets, thin sliced							4.99	100	4.99	
Strips	4.58 - 4.99	300	4.81							
Tenders	4.99 - 5.99	210	5.18	5.99	20	5.99	3.49 - 4.99	200	4.22	
Marinated Tenders	4.26 - 4.66	280	4.50	4.26	1,140	4.26	4.26	10	4.26	
Drumsticks					1,110		1.29	10	1.29	
Thighs										
Wings	1.78 - 2.49	10	2.19				1.29	10	1.29	
Necks							1.29	10	1.29	
Smoked Drumsticks	1.99	20	1.99	1.99	10	1.99	1.79	10	1.79	
Smoked Wings	1.99	20	1.99	1.99	10	1.99	1.79	10	1.79	
Smoked Necks	1.99	20	1.99	1.99	10	1.99	1.79	10	1.79	
GROUND TURKEY:										
Patties	2.99 - 4.00	910	3.20	2.99 - 3.50	100	3.08	3.49 - 4.29	220	3.90	
Sausage	2.39 - 4.79	1,050	3.41	2.99	10	2.99	2.86 - 3.99	190	3.31	
85% lean	1.99 - 3.00	570	2.71	2.19 - 2.99	250	2.62	2.33 - 3.19	110	2.62	
93% lean	3.07 - 3.99	1,430	3.18	2.74 - 3.07	90	3.03	2.80 - 3.33	200	3.10	
Breast (99-100% lean)	3.84 - 5.99	300	5.17	3.84 - 4.99	170	4.66	3.99 - 4.79	330	4.37	
Rolls (frsh/frz 1 lb.)							1.79 - 2.50	180	2.47	
Specialty <sup>5/</sup>										
Patties	3.99	40	3.99				3.88 - 3.99	50	3.97	
93-94% lean	3.59 - 4.99	320	4.04				3.88 - 3.99	170	3.98	
Breast	5.49 - 7.99	40	6.25				5.99	20	5.99	



# **USDA Weekly Retail Turkey Feature Activity**

Fri. Jul 12, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/12 thru 07/18.

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

	SOUTH (	ENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  57.6% of 1,200 sampled outlets  35.0% of stores w/ no-price promotions				
	(AR,AZ,CO,KS,I	_A,MO,NM,OK,TX	,UT)	(C	A,HI,NV)					
Feature Rate 1/	31.3% of 4,20	00 sampled outlet	s	54.3% of 2,9	00 sampled outlet					
Special Rate 4/	0.0% of stores w	/ no-price promo	tions	27.3% of stores	w/ no-price promo					
Activity Index 2/		Index = 1,430			y Index = 940		Activity Index = 710			
	Price Range	Summary Stores Wtd Avg		Price Range	Summary		Price Range	Summary		
	(\$/pound)	Stores V	via Avg	(\$/pound)	Stores V	/td Avg	(\$/pound)	Stores \	Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.49	20	2.49							
Frozen	1.29 - 1.79	40	1.60							
Split, bone-in										
Fresh										
Rotisserie	6.99	120	6.99	7.99	130	7.99				
Boneless, whole										
Cutlets	5.72	10	5.72				5.72	10	5.72	
Cutlets, thin sliced										
Strips										
Tenders	4.00 - 5.03	30	4.42							
Marinated Tenders										
Drumsticks										
Thighs										
Wings										
Necks										
Smoked Drumsticks				1.99	10	1.99				
Smoked Wings				1.99	10	1.99				
Smoked Necks										
GROUND TURKEY:										
Patties	3.49 - 3.99	50	3.61				3.49 - 3.99	30	3.86	
Sausage	2.39 - 2.99	60	2.71	2.47	250	2.47	3.27	220	3.27	
85% lean	2.67 - 2.99	70	2.87	2.39	250	2.39	2.66 - 2.71	190	2.67	
93% lean	2.40 - 3.99	170	3.84	2.40 - 3.19	250	2.57	3.19 - 3.59	250	3.20	
Breast (99-100% lean)	4.39 - 5.49	780	4.88	4.99 - 5.35	40	5.28	4.79	10	4.79	
Rolls (frsh/frz 1 lb.)	1.99 - 2.79	80	2.54							
Specialty <sup>5/</sup>										
Patties										
93-94% lean										
Breast										



#### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jul 12, 2013

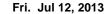
Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/12 thru 07/18.

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

	N	ATIONAL	SUMMAR	lY.			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)			
- · - · · · · · · · · · · · · · · · · ·	<b>72.5%</b> o	f 23,200	72.0% o	f 23,200	73.4% o	f 22,500							
Feature Rate 1/	sto	res	sto	res	sto	res	84.9% of 4,600 sampled outlets		77.9% of 6,100 sampled outlets				
A official to do a Of	- 44	0.40	45	200	44	0.40		Activity Index = 14,060		Activity Index = 10,800			
Activity Index 2/	44,	640	45,0	660	44,	340	Pr	Price Range Summary		Price Range Sui		ımmary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg
SERVICE DELI - Turkey							·						
Category 1													
Processor Brand	6,520	8.18	4,280	7.77	6,750	7.86	6.4	18 - 12.99	3,900	8.42	6.99 - 8.99	710	8.38
Private Brand	740	7.46	2,670	7.22	3,470	7.21	6.9	9 - 9.99	220	7.07	7.49	110	7.49
Category 2													
Processor Brand	3,890	5.94	5,940	5.68	4,890	6.11	4.9	99 - 7.99	1,050	6.50	4.59 - 6.99	630	5.78
Private Brand	4,680	7.26	1,110	6.34	3,430	6.60	4.9	9 - 7.99	910	6.49	5.99 - 7.99	1,750	6.99
Category 3													
Processor Brand	1,870	4.02	1,740	4.16	1,510	4.41	3.9	9 - 4.99	450	4.10	3.99 - 4.99	320	4.18
Private Brand	80	5.48	330	5.07	310	4.47		5.48	80	5.48			
Turkey Ham													
Processor Brand	670	3.46	240	3.90	180	3.30	2.9	99 - 4.99	250	3.34	3.49	30	3.49
Private Brand													
Turkey Pastrami													
Processor Brand	320	4.24	150	4.65	280	4.04	3.7	<b>'</b> 9 - 3.99	180	3.98	3.49	30	3.49
Private Brand					120	4.99							
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,120	7.28	4,980	7.90	,	7.73	5.9		1,800	7.55	5.99 - 8.49	160	7.01
Private Brand	760	7.72	1,350	7.41	920	6.69	6.9	99 - 8.99	710	7.81			
Category 2													
Processor Brand	140	5.38	90	5.17	430	5.23		5.99	50	5.99			
Private Brand	140	5.99	60	5.99	420	4.63		5.99	20	5.99			
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz	0.540	2.00	0.000	0.00	0.070	0.04		10 000	4 400	2.45	0.00 0.40	0.050	2.40
Processor Brand Private Brand	6,540 2,650	3.08 3.55	9,680 1,570	2.89 3.70	· ·	2.94 3.12		19 - 3.99 59 - 3.33	1,480 360	3.15 3.11	2.00 - 3.49 2.50 - 3.99	2,250 490	3.16 3.44
Turkey 16 oz	2,030	ა.აა	1,570	3.70	1,230	3.12	2.5	a - 3.33	360	3.11	2.50 - 3.99	490	3.44
Processor Brand	3.630	5.06	580	4.85	840	5.26	3 5	59 - 5.99	910	4.82	4.49 - 5.99	1,610	5.17
Private Brand	3,030	5.00	300	4.00	040	5.20	3.0	J - J.33	310	4.02	4.43 - 3.33	1,010	5.17
Chicken 7-10 oz													
Processor Brand	6,320	3.09	9,380	2.90	7,340	2.90	24	19 - 3.99	1,410	3.15	2.00 - 3.49	2,220	3.17
Private Brand	2,570	3.57	1,510	3.74	1,130	3.09		59 - 3.33	280	3.14	2.50 - 3.99	490	3.44
a.s Brana	_,0.0	0.01	.,0.0	J., 1	.,.50	0.00			_00	<u> </u>	2.00 0.00	.50	<b>U</b>

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)





### **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 07/12 thru 07/18.

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

	MIDWEST U.S.			ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.		
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY)  73.5% of 1,200 sampled outlets		
Feature Rate 1/									
- Outdio Hato		sampled outlets	· ·	sampled outlets	· ·	sampled outlets			
Activity Index 2/		ndex = 8,030	•	ndex = 6,180		dex = 3,490	Activity Index = 2,080		
	Price Range	Summary	Price Range	Summary Stores With Ave	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	6.39 - 9.99	950 7.26	5.98 - 10.99	710 7.95	7.99 - 8.49	200 8.02	6.99 - 12.99	50 8.89	
Private Brand	6.99 - 10.99	270 7.75	7.49	140 7.49	7.99 - 0.49	200 0.02	0.99 - 12.99	50 6.69	
Category 2	6.99 - 10.99	270 7.75	7.49	140 7.49					
Processor Brand	4.98 - 6.99	890 6.07	4.97 - 6.99	1,050 5.39	4.99 - 5.99	230 5.81	5.99	40 5.99	
Private Brand	4.99 - 8.99	480 6.25	5.99 - 8.99	530 8.03	4.99 - 8.99	680 8.25	8.99	330 8.99	
Category 3	4.00 0.00	400 0.20	0.00 0.00	0.00	4.00 0.00	000 0.20	0.00	0.00	
Processor Brand	2.99 - 4.99	550 3.70	2.99 - 3.99	250 3.70	2.99 - 3.49	70 3.30	4.97 - 4.99	230 4.99	
Private Brand	2.00	000 00	2.00	200 00	2.00			20000	
Turkey Ham									
Processor Brand	2.39 - 3.49	20 2.84	3.19	10 3.19	2.49 - 3.99	360 3.59			
Private Brand									
Turkey Pastrami									
Processor Brand	3.49 - 4.99	110 4.86							
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.99 - 8.99	1,000 6.78	5.29 - 8.99	150 7.64	8.99	10 8.99			
Private Brand	5.99 - 7.99	50 6.52							
Category 2									
Processor Brand	4.49 - 5.98	90 5.04							
Private Brand	5.99	120 5.99							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.99 - 3.50	1,230 2.99	2.00 - 2.50	810 2.73	1.99 - 3.87	460 3.62	2.00 - 2.99	310 2.62	
Private Brand	2.50 - 3.99	400 3.57	2.50 - 3.99	700 3.40	3.99	290 3.99	3.99	410 3.99	
Turkey 16 oz									
Processor Brand	4.49 - 5.99	330 4.90	3.99 - 4.99	340 4.92	4.99 - 5.99	440 5.41			
Private Brand									
Chicken 7-10 oz									
Processor Brand	1.99 - 3.50	1,140 3.01	2.00 - 2.50	790 2.73	1.99 - 3.87	460 3.62	2.00 - 2.99	300 2.62	
Private Brand	2.50 - 3.99	400 3.57	2.50 - 3.99	700 3.40	3.99	290 3.99	3.99	410 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)