USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/09 thru 08/15.

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

Fri. Aug 09, 2013

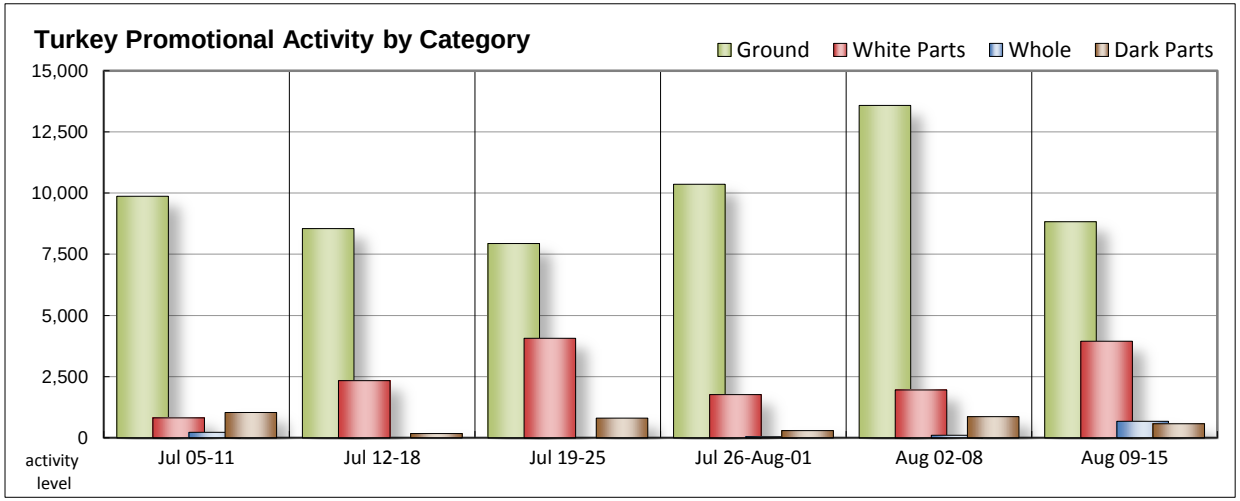
NATIONAL SUMMARY

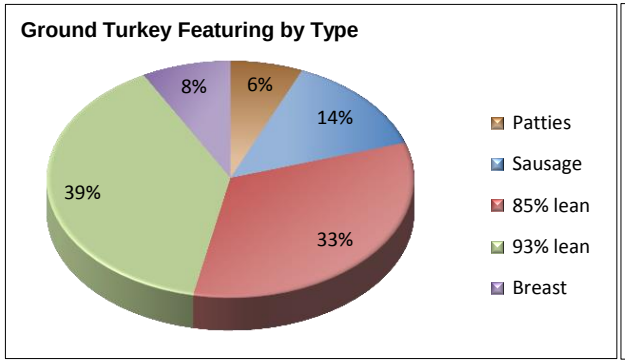
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate [1/]	**48.0% of 23,200 outlets**		**50.7% of 23,200 outlets**		**40.7% of 22,500 outlets**	
Special Rate [4/]	**0.5%**		**1.8%**		**0.1%**	
Activity Index [2/]	**16,740**		**18,970**		**14,040**	
3/	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**	**Stores**	**Wtd Avg**
WHOLE BIRDS:						
Fresh - Hens					60	1.79
" - Toms						
Frozen - Hens	340	1.24	110	0.99		
" - Toms	340	1.24				
PARTS:						
Breast:						
Bone-in, whole						
Fresh					30	2.42
Frozen	2,670	1.31	910	1.66	60	1.62
Split, bone-in						
Fresh	10	1.99				
Rotisserie	660	8.15	320	8.63	1,250	8.26
Boneless, whole	260	5.22	10	3.99	580	3.99
Cutlets	110	5.48	430	5.04	950	4.30
Cutlets, thin sliced	70	4.99			100	4.99
Strips						
Tenders	170	5.27	290	4.82	1,020	4.30
Marinated Tenders	1,400	5.27	850	4.53	610	4.39
Drumsticks			280	1.87	190	2.02
Thighs			150	1.96		
Wings	20	1.99	290	2.09	140	1.94
Necks			50	1.79	70	2.16
Smoked Drumsticks	180	2.29	40	2.09	10	2.25
Smoked Wings	190	1.69	30	1.96	10	2.25
Smoked Necks	190	1.69	30	1.96	20	1.99
GROUND TURKEY:	**8,830**	**3.20**	**13,580**	**3.13**	**7,330**	**3.24**
Patties	570	3.66	1,580	3.61	420	3.06
Sausage	1,210	3.41	1,440	3.35	2,080	3.39
85% lean	2,920	2.76	5,160	2.53	870	2.48
93% lean	3,430	3.17	4,210	3.25	3,640	3.26
Breast	700	4.57	1,190	4.59	320	4.62
Rolls (frsh/frz 1 lb.)	370	2.46	890	2.66	280	2.08
Specialty [5/]						
Patties	130	3.86	280	4.94	180	3.77
93-94% lean	140	3.70	340	3.88	500	4.33
Breast	660	5.53	90	5.39	650	6.31

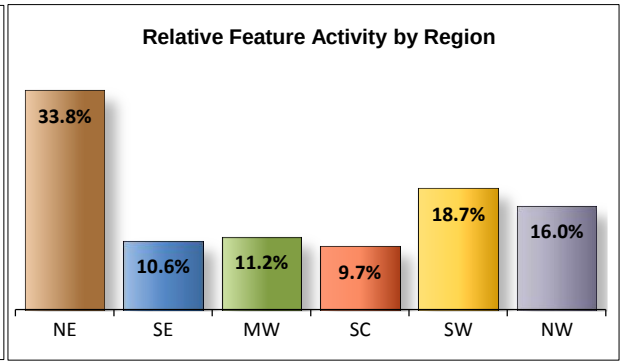
Note: rolls & specialty not included in ground turkey total and weighted average.

This Week's Turkey Feature Highlights

Retail feature activity slows going into the middle of the month. More stores are offering frozen whole turkeys this week. The big news is frozen bone-in breasts; they are heavily promoted across most regions and prices are sharply lower. More stores are featuring rotisserie breasts and prices are lower; after shopping for school supplies why not pick up a rotisserie breast for an easy hot meal? Offerings on boneless white parts centered on marinated tenders at sharply higher prices. Shoppers looking for dark parts will find mostly smoked items in this week's circulars. Promotional activity slows on ground turkey, but last week's promotions were exceptionally active. The 93% lean gets the most ad space; advertised prices are lower. Deli is more active; an increase in self-service deli more than made up for the decline in service deli promotions. Retailers back off promotions on their service deli private brands and instead push processor brands. Self-service deli offerings increase on private brands, decline on processor brands; prices are 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 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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Fri. Aug 09, 2013

	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/]	**63.4% of 4,600 sampled outlets**			**42.7% of 6,100 sampled outlets**			**30.6% of 4,200 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 = 6,750**			**Activity Index = 2,870**			**Activity Index = 2,030**		
	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 - 1.49	340	1.24						
" - Toms	0.99 - 1.49	340	1.24						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 2.27	540	1.39	0.99 - 2.27	680	1.45	0.97 - 1.79	610	1.18
Split, bone-in									
Fresh	1.99	10	1.99						
Rotisserie	5.99 - 8.99	410	8.25						
Boneless, whole	4.99 - 5.99	60	5.65	5.99	20	5.99			
Cutlets	5.99	40	5.99	5.99	20	5.99			
Cutlets, thin sliced							4.99	70	4.99
Strips									
Tenders	5.99	40	5.99	5.99	20	5.99	4.99	70	4.99
Marinated Tenders	4.79 - 5.33	210	5.09	5.33	1,150	5.33	5.33	10	5.33
Drumsticks									
Thighs									
Wings	2.48	10	2.48	1.49	10	1.49			
Necks									
Smoked Drumsticks	2.29	180	2.29						
Smoked Wings	1.69	190	1.69						
Smoked Necks	1.69	190	1.69						
GROUND TURKEY:									
Patties	2.99 - 3.99	350	3.58	3.50 - 3.79	90	3.73	3.50	20	3.50
Sausage	2.98 - 3.99	510	3.44	3.39 - 3.49	140	3.43	3.28 - 3.90	140	3.74
85% lean	2.33 - 3.33	1,040	2.73	2.49 - 2.69	480	2.56	1.99 - 3.19	90	2.18
93% lean	2.53 - 3.99	940	3.12	2.99 - 3.33	170	3.05	2.80 - 3.75	620	3.24
Breast (99-100% lean)	4.61 - 5.38	520	4.80	4.61	20	4.61	4.16	50	4.16
Rolls (frsh/frz 1 lb.)							1.79 - 3.00	330	2.51
Specialty [5/]									
Patties	3.49 - 4.99	130	3.86						
93-94% lean	3.29 - 4.99	140	3.70						
Breast	5.49 - 5.99	560	5.53	5.49	70	5.49	5.99	20	5.99

USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/09 thru 08/15.

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

Fri. Aug 09, 2013

	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/]	**44.6% of 4,200 sampled outlets**			**58.6% of 2,900 sampled outlets**			**58.5% of 1,200 sampled outlets**		
Special Rate [4/]	**2.9% 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 = 1,760**			**Activity Index = 2,460**			**Activity Index = 870**		
	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg	Price Range ($/pound)	Summary Stores	Summary Wtd Avg
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 1.99	500	1.38	0.99	270	0.99	0.99	70	0.99
Split, bone-in									
Fresh									
Rotisserie	7.99	120	7.99	7.99	130	7.99			
Boneless, whole				4.99	180	4.99			
Cutlets	3.99 - 5.72	30	4.72				5.09	20	5.09
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 5.03	20	4.54				4.79	20	4.79
Marinated Tenders	4.39	20	4.39				4.39	10	4.39
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.50	30	3.50	3.99	10	3.99	3.99	70	3.99
Sausage	3.27	10	3.27	3.19 - 3.27	410	3.27			
85% lean	2.49 - 3.19	800	3.05	2.47 - 3.19	470	2.66	2.71 - 3.19	40	2.94
93% lean	2.74 - 3.19	200	3.14	3.19	980	3.19	3.19	520	3.19
Breast (99-100% lean)	4.39	30	4.39				3.27 - 4.39	80	3.40
Rolls (frsh/frz 1 lb.)							1.77 - 2.89	40	2.08
Specialty [5/]									
Patties									
93-94% lean									
Breast				4.99	10	4.99			

USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 09, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/09 thru 08/15.

(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							
Feature Rate 1/	71.2% of 23,200 stores		80.3% of 23,200 stores		74.8% of 22,500 stores		84.9% of 4,600 sampled outlets			63.3% of 6,100 sampled outlets		
Activity Index 2/	47,720		50,280		47,490		Activity Index = 13,170			Activity Index = 10,170		
	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	4,870	8.23	4,760	8.14	6,640	8.08	5.98 - 10.49	1,920	8.52	6.99 - 9.99	1,110	8.09
Private Brand	2,170	8.40	1,380	7.87	4,100	7.81	6.99 - 9.99	1,440	8.40	7.49	140	7.49
Category 2												
Processor Brand	4,090	5.97	4,290	6.08	4,160	5.70	4.96 - 6.99	1,220	5.73	4.99 - 6.99	820	6.78
Private Brand	1,180	5.59	5,460	7.20	2,990	6.17	4.99 - 6.99	410	5.42	5.99	10	5.99
Category 3												
Processor Brand	1,610	4.10	740	4.07	1,160	3.79	3.99 - 4.99	990	4.24	4.98	10	4.98
Private Brand	150	5.26	320	4.85	220	4.03	4.99 - 5.48	150	5.26			
Turkey Ham												
Processor Brand	640	3.96	460	3.84	230	3.11	3.99 - 4.99	350	4.53	4.99	20	4.99
Private Brand	20	4.49			20	3.99	4.49	20	4.49			
Turkey Pastrami												
Processor Brand	440	3.92	350	4.48	200	4.29	3.49 - 4.99	360	3.88	3.69 - 4.99	60	4.13
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,600	7.41	3,740	7.63	3,800	7.66	5.99 - 8.99	1,750	7.53	5.99 - 8.49	730	7.04
Private Brand	790	7.18	2,380	7.30	3,110	7.23	6.99 - 7.99	430	7.56	6.49	90	6.49
Category 2												
Processor Brand	290	6.57	80	4.99	120	4.84	4.99	10	4.99			
Private Brand	200	5.99	220	7.53	510	5.29						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,750	3.00	10,980	3.15	8,220	3.19	2.49 - 4.00	1,680	3.24	1.97 - 3.99	2,620	3.12
Private Brand	3,060	2.99	770	3.06	1,510	3.14	2.50 - 2.99	390	2.60	2.50 - 3.99	880	3.13
Turkey 16 oz												
Processor Brand	630	5.47	2,850	4.53	1,100	5.32	3.99 - 6.99	50	4.74	3.99 - 6.99	220	6.72
Private Brand			210	4.99								
Chicken 7-10 oz												
Processor Brand	10,170	3.01	10,600	3.17	7,890	3.20	2.49 - 4.00	1,610	3.25	2.29 - 3.99	2,580	3.13
Private Brand	3,060	2.99	690	3.06	1,510	3.14	2.50 - 2.99	390	2.60	2.50 - 3.99	880	3.13

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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	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)		
Feature Rate 1/	**78.6% of 4,200 sampled outlets**			**65.3% of 4,200 sampled outlets**			**59.8% of 2,900 sampled outlets**			**77.4% of 1,200 sampled outlets**		
Activity Index 2/	**Activity Index = 9,610**			**Activity Index = 7,100**			**Activity Index = 5,100**			**Activity Index = 2,570**		
	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	6.39 - 8.99	790	7.44	7.99 - 9.99	390	7.80	7.99 - 9.99	280	9.79	6.99 - 8.99	380	8.06
Private Brand	6.99 - 10.99	110	8.25	6.99 - 7.99	100	7.50	8.99	380	8.99			
Category 2												
Processor Brand	4.94 - 6.99	970	6.00	4.99 - 6.99	860	5.70	4.99	170	4.99	4.98 - 6.99	50	6.07
Private Brand	4.99 - 5.99	520	5.53	5.99	240	5.99						
Category 3												
Processor Brand	2.98 - 4.58	380	3.80	2.98 - 4.49	220	3.96	2.99	10	2.99			
Private Brand												
Turkey Ham												
Processor Brand				1.99 - 2.99	170	2.85	3.29 - 3.99	100	3.64			
Private Brand												
Turkey Pastrami												
Processor Brand	3.98	20	3.98									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.98 - 7.99	560	7.11	6.99 - 7.99	420	7.73	7.99	10	7.99	6.99 - 10.99	130	8.13
Private Brand	6.49 - 6.99	270	6.80									
Category 2												
Processor Brand	4.58 - 6.99	230	6.59	6.99	40	6.99	5.99	10	5.99			
Private Brand	5.99	200	5.99									
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.50	2,050	2.79	1.99 - 2.50	1,730	2.97	2.00 - 3.99	1,800	2.89	1.99 - 3.99	870	3.00
Private Brand	2.50 - 3.99	770	3.16	2.50 - 3.99	610	3.00	2.50	270	2.50	2.50 - 3.99	140	3.22
Turkey 16 oz												
Processor Brand	3.99 - 5.19	120	4.60	3.98 - 5.99	70	4.71	4.99	170	4.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.50	1,850	2.79	2.00 - 2.89	1,640	2.99	2.49 - 3.99	1,630	2.87	1.99 - 3.99	860	3.00
Private Brand	2.50 - 3.99	770	3.16	2.50 - 3.99	610	3.00	2.50	270	2.50	2.50 - 3.99	140	3.22

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)