

USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/16 thru 08/22.

(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											
Feature Rate 1/	36.8% ou	of 23,200 tlets	ou	of 23,200 tlets	40.1% of 22,50 outlets							
Special Rate 4/		4%		5%	1.6%							
Activity Index 2/		,200		,740	13,950							
3/	Stores Wtd Avg		Stores Wtd Avg		Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens												
- 101115			0.40	4.04								
Frozen - Hens			340									
" - Toms			340	1.24								
PARTS:												
Breast:												
Bone-in, whole Fresh												
Frozen	320	1.83	2,670	1.31	800	1.87						
Split, bone-in	320	1.03	2,070	1.51	800	1.07						
Fresh	10	3.49	10	1.99	180	2.99						
Rotisserie	180		660		660							
Boneless, whole	40		260		270							
Cutlets	490		110		720							
	490	5.20	70		720	4.09						
Cutlets, thin sliced			70	4.99								
Strips												
Tenders	270	-	170		270							
Marinated Tenders	870		1,400	5.27	1,600							
Drumsticks	30				180							
Thighs	20		00	4.00	150							
Wings	50		20	1.99	140							
Necks	10		400	0.00	140							
Smoked Drumsticks	180 160		180 190		20 30							
Smoked Wings Smoked Necks	160	1.99	190		10							
GROUND TURKEY:	9,310	3.31	8,830		8,110							
Patties	490		570		1,210							
Sausage	1,730		1,210		2,170							
85% lean	1,230		2,920		1,560							
93% lean	4,680		3,430		2,120							
Breast	1,180		700		1,050							
Rolls (frsh/frz 1 lb.)	340		370		390							
Specialty 5/			270									
Patties	40	5.99	130	3.86	20	4.49						
93-94% lean	820		140		260							
Breast	60		660	5.53								
Note: rolls & specialty no	ot included		turkey tota	al and weig	hted avera	age.						

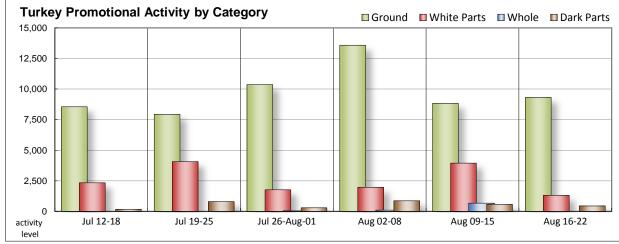
active featuring; prices are higher. Fewer stores promote rotisserie breasts; prices are lower. Featuring declines on boneless white parts. While offerings slow on marinated tenders they remain the most popular item in this category; prices are sharply lower. There are a limited number of promotions on dark parts, mostly smoked drums and wings. Ground turkey featuring increases from last week; 93% lean continues to be the most actively promoted grind. Deli promotional activity increases on both service deli and self-service deli items. Processor brand service deli thick slicing meat is the most actively promoted deli item; prices are mostly lower on service deli. Most of the increased feature activity for self-service deli is due to so many stores promoting 16 ounce turkey tubs. Vacations are winding down as students head back to school and summer seems to be slipping away.

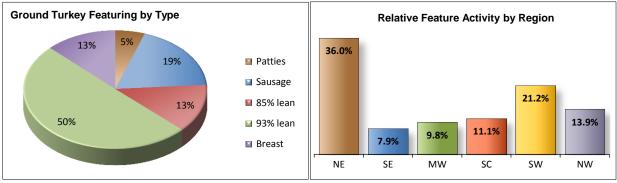
Turkey Promotional Activity by Category

Ground White Parts Whole Dark Parts

This Week's Turkey Feature Highlights

Feature activity slows on turkey items as retailers turn their attention to deli items and back to school specials. No one seems to be interested in featuring whole turkeys, not surprising this time of year. Offerings on frozen bone-in breast decrease from last week's very





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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	NORTH	HEAST U.S.		SOU	THEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 22.4% of 4,200 sampled outlets 1.9% of stores w/ no-price promotions Activity Index = 1,410			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,N	MS,NC,SC,TN,VA,W	/V)				
Feature Rate 1/	1	0 sampled outle		·	100 sampled outle					
Special Rate 4/	0.0% of stores w	/ no-price promo	tions	0.2% of stores	w/ no-price promo	otions				
Activity Index 2/	Activity	Index = 5,680		Activi	ty Index = 1,710					
	Price Range	Summary		Price Range	Summai	•	Price Range	Summai	•	
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Ntd Avg	(\$/pound)	Stores \	Ntd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen				1.29	10	1.29	1.78 - 1.99	280	1.85	
Split, bone-in										
Fresh							3.49	10	3.49	
Rotisserie	6.89 - 9.99	90	7.42	8.49	70	8.49	6.99	20	6.99	
Boneless, whole	4.99	30	4.99							
Cutlets	4.99	400	4.99							
Cutlets, thin sliced										
Strips										
Tenders	4.59	70	4.59	4.59	20	4.59				
Marinated Tenders	4.26 - 4.79	760	4.38	4.26	70	4.26	4.53	20	4.53	
Drumsticks	2.49	20	2.49	4.20	70	4.20	1.69	10	1.69	
Thighs	2.99	20	2.99				1.00	10	1.00	
Wings	1.99 - 2.49	40	2.29				1.69	10	1.69	
Necks	1.99 - 2.49	40	2.23				1.69	10	1.69	
Smoked Drumsticks	1.99	170	1.99				1.99	10	1.99	
Smoked Wings	1.99	150	1.99				1.99	10	1.99	
Smoked Necks	1.55	130	1.55				1.55	10	1.55	
GROUND TURKEY:										
Patties	3.59	10	3.59	3.00	20	3.00	3.00 - 3.99	100	3.88	
Sausage	2.63 - 3.99	610	3.54	3.00 - 3.59	340	3.34	2.99 - 3.90	130	3.38	
85% lean	2.33 - 3.33	200	2.70	2.19 - 2.99	440	2.84	1.99 - 2.66	160	2.39	
93% lean	2.49 - 3.84	1,840	3.34	2.90 - 3.49	280	3.06	2.49 - 3.19	310	3.03	
Breast (99-100% lean)	3.84 - 5.38	480	4.83	3.84 - 4.38	260	4.27	3.27 - 4.55	170	4.01	
Rolls (frsh/frz 1 lb.)	2.99	20	2.99	2.99	120	2.99	2.66	90	2.66	
Specialty 5/	2.00			2.55			2.55			
Patties	5.99	40	5.99							
93-94% lean	3.49 - 3.99	690	3.54	3.49	70	3.49	3.99 - 4.49	60	4.16	
Breast	5.49 - 6.99	40	5.96	5.49	10	5.49	5.49	10	5.49	

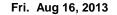


Fri. Aug 16, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/16 thru 08/22.

(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,I	_A,MO,NM,OK,TX	,UT)		(0	A,HI,NV)			(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	32.2% of 4,20	00 sampled outlet	s	4	9.0% of 2,9	00 sampled outl	ets	45.7% of 1,200 sampled outlets				
Special Rate 4/	0.0% of stores w	/ no-price promo	tions	0.0%	of stores v	v/ no-price prom	otions	0.0% o	0.0% of stores w/ no-price promotions			
Activity Index 2/		Index = 1,590				Index = 2,210		Activity Index = 600				
	Price Range	Summary			Range	Summary		Price Range			Summary	
	(\$/pound)	Stores V	Vtd Avg	(\$/p	ound)	Stores	Wtd Avg	(\$/pou	nd)	Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.79	30	1.79									
Split, bone-in												
Fresh												
Rotisserie												
Boneless, whole	3.99	10	3.99									
Cutlets	3.49 - 6.81	70	5.93						5.81	20	6.81	
Cutlets, thin sliced												
Strips												
Tenders	3.49 - 5.03	110	4.01		3.99	70	3.99					
Marinated Tenders									3.99	20	3.99	
Drumsticks												
Thighs												
Wings												
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.49	80	3.49	3.49	- 3.99	240	3.96	;	3.49	40	3.49	
Sausage	2.79 - 3.49	130	3.14	2.45	- 4.39	520	2.96					
85% lean	1.99 - 2.80	130	2.67	2.39	- 3.19	290	2.45]	2.00	10	2.00	
93% lean	2.78 - 3.99	810	3.29	2.79	- 3.51	1,090	3.08	2.79 - 3	3.19	350	2.83	
Breast (99-100% lean)	4.16 - 4.99	110	4.42					3.91 - 4	4.39	160	3.99	
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	110	2.70									
Specialty ^{5/}												
Patties												
93-94% lean												
Breast												



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats



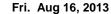
Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/16 thru 08/22.

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

	N	NATIONAL SUMMARY			NORTHEA	AST U.S.	SOUTHE	SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	H,NJ,NY,PA,RI,VT)	(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	79.9% o	f 23,200	71.2% o	f 23,200	78.9% o	f 22,500							
Feature Rate 1/	sto	res	sto	res	sto	res	88.9% of 4,600 sa	ampled outlets	79.0% of 6,100	79.0% of 6,100 sampled outlets			
Activity Index 2/	EA	090	47	720	F2	170	Activity Inde	x = 14,670	Activity Inc	Activity Index = 12,750			
Activity Index 2/	54,	090	47,	120	53,	170	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	7,410	7.93	4,870	8.23	5,190	7.89	5.99 - 12.99	2,800 8.06	6.99 - 8.99	2,540	7.85		
Private Brand	590	8.21	2,170	8.40	1,680	7.64	6.27 - 8.99	380 8.26	7.49	70	7.49		
Category 2													
Processor Brand	3,910	5.87	4,090	5.97	4,530	5.62		1,260 5.68	4.99 - 6.99	560	6.02		
Private Brand	3,570	6.63	1,180	5.59	5,750	6.65	4.99 - 6.99	1,750 6.86	5.99 - 6.99	680	6.28		
Category 3													
Processor Brand	1,090	4.07	1,610	4.10		3.98		440 3.97	3.99 - 4.59	110	4.50		
Private Brand	210	4.19	150	5.26	1,400	4.95	3.99 - 4.98	200 4.20					
Turkey Ham													
Processor Brand	210	2.86	640	3.96	450	3.81		30 3.60					
Private Brand	40	4.48	20	4.49			4.48	40 4.48					
Turkey Pastrami													
Processor Brand	60	5.30	440	3.92	320	3.98	3.59 - 4.98	20 4.05					
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	2,780	7.36	3,600	7.41	4,240	7.46		1,010 7.57	7.99 - 8.49	380	8.39		
Private Brand	1,040	7.21	790	7.18	1,360	7.06	6.99	240 6.99	6.49 - 6.99	220	6.78		
Category 2													
Processor Brand	980	5.01	290	6.57	100	4.98		730 5.01					
Private Brand	520	6.16	200	5.99	1,360	5.03							
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	12,410	3.05	10,750	3.00	- ,	3.17		2,210 3.21	1.97 - 3.59	3,780	3.05		
Private Brand	1,950	3.06	3,060	2.99	2,780	2.57	2.50 - 3.49	280 3.31	2.69 - 3.49	290	3.05		
Turkey 16 oz				_ :=									
Processor Brand	4,080	5.44	630	5.47	1,850	5.31	3.99 - 5.99	940 5.10	4.99 - 5.99	460	5.10		
Private Brand													
Chicken 7-10 oz	44.000	0.05	40.470	0.64	0.070	0.40		0.000	0.00 0.50	0.070	0.00		
Processor Brand	11,290	3.05	10,170	3.01	8,970	3.19		2,060 3.20	2.00 - 3.59	3,370	3.03		
Private Brand	1,950	3.06	3,060	2.99	2,780	2.57	2.50 - 3.49	280 3.31	2.69 - 3.45	290	3.05		

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 08/16 thru 08/22.

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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY) 75.3% of 1,200 sampled outlets		
	(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)			
Feature Rate 1/									
		sampled outlets	· ·	sampled outlets	· ·	sampled outlets			
Activity Index 2/		dex = 10,180		ndex = 9,560		dex = 4,630	Price Range	dex = 2,300	
	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	(\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey	(ψ/ροαπα)	Stoles With Avg	(φ/ροαπα)	Stores With Avg	(φ/ροαίια)	Stores With Avg	(ψ/ροατία)	Stoles Wid Avg	
Category 1									
Processor Brand	6.49 - 8.99	1,010 6.98	7.99 - 10.49	550 8.30	8.99	10 8.99	7.99 - 11.99	500 9.05	
Private Brand	7.99 - 10.99	110 8.57	7.99	30 7.99	0.00	10 0.00	7.00	000 0.00	
Category 2	7.00 10.00	110 0.07	7.55	7.00					
Processor Brand	4.99 - 6.99	1,020 6.16	4.99 - 5.99	620 5.64	4.99 - 5.99	410 5.89	4.99 - 6.99	40 6.15	
Private Brand	5.98 - 6.49	490 6.02	5.99 - 6.99	640 6.89			4.99	10 4.99	
Category 3									
Processor Brand	2.98 - 4.49	310 4.01	3.99 - 4.99	160 4.33	3.49	30 3.49	2.99 - 4.99	40 3.85	
Private Brand	3.98	10 3.98							
Turkey Ham									
Processor Brand	2.98 - 3.29	10 3.14	2.49 - 2.99	50 2.64	2.47 - 3.69	120 2.75			
Private Brand									
Turkey Pastrami									
Processor Brand	2.98 - 3.98	30 3.57					12.99	10 12.99	
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.99 - 8.99	760 6.70	5.99 - 7.99	500 6.69	8.99 - 10.99	50 10.63	7.99	80 7.99	
Private Brand	5.99 - 8.99	350 7.52	6.99 - 7.99	230 7.35					
Category 2									
Processor Brand	4.99 - 5.58	70 5.07			4.99	180 4.99			
Private Brand	4.99 - 6.99	400 6.51	4.99	120 4.99					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.99 - 3.50	2,040 2.92	1.99 - 2.98	2,570 2.94	2.50 - 3.50	1,330 3.15	2.50 - 3.99	480 3.26	
Private Brand	1.99 - 3.00	530 2.69	1.99 - 3.49	490 2.87	3.99	250 3.99	2.99	110 2.99	
Turkey 16 oz									
Processor Brand	4.48 - 5.99	510 5.11	4.48 - 5.29	930 5.35	5.99 - 6.49	800 6.07	5.99	440 5.99	
Private Brand									
Chicken 7-10 oz	4.00	0.000	0.40	0.400	0.50 0.50	4 000	0.50	400 0.00	
Processor Brand	1.99 - 3.50	2,000 2.92	2.49 - 3.27	2,180 2.97	2.50 - 3.50	1,200 3.17	2.50 - 3.99	480 3.26	
Private Brand	1.99 - 3.00	530 2.69	1.99 - 3.49	490 2.87	3.99	250 3.99	2.99	110 2.99	

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)