



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/06 thru 07/12.

Fri. Jul 06, 2012

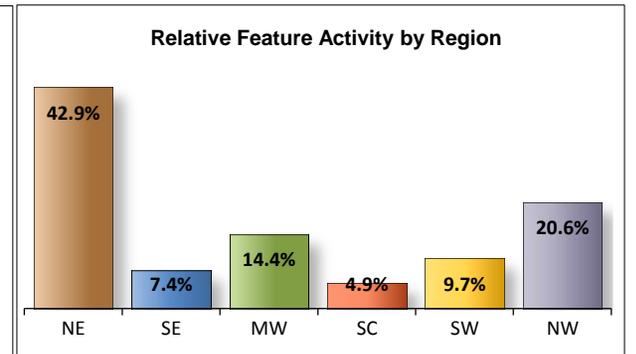
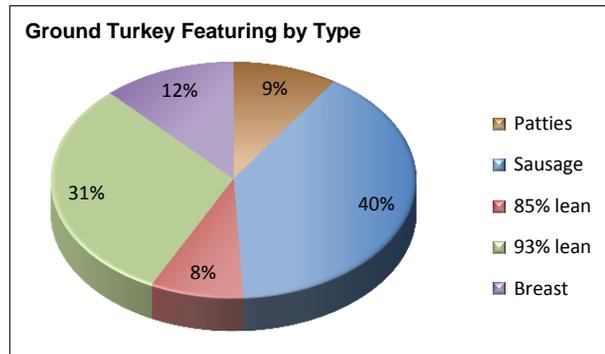
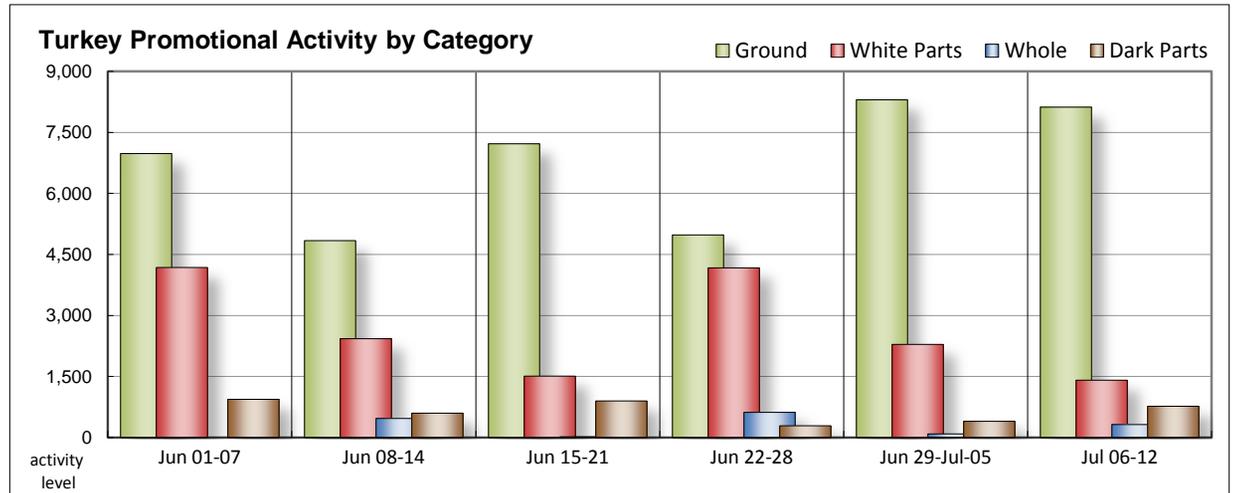
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	29.6% of 22,500 outlets		35.1% of 22,500 outlets		42.1% of 19,500 outlets	
Special Rate ^{4/}	4.1%		0.8%		9.5%	
Activity Index ^{2/}	11,890		13,960		13,490	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			10	1.59	20	1.69
" - Toms					20	1.69
Frozen - Hens	160	1.19	30	1.34	120	1.29
" - Toms	160	1.19	50	1.43		
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	380	1.73	610	2.01	700	1.55
Split, bone-in						
Fresh			260	3.00	160	2.69
Rotisserie	10	8.99	140	6.26	280	8.31
Boneless, whole	10	4.97	200	4.03	10	3.99
Cutlets	570	5.00	650	4.79	900	4.61
Cutlets, thin sliced	20	5.49			10	4.99
Strips	180	4.99				
Tenders	240	4.05	430	4.05	350	4.33
Marinated Tenders	350	4.36	1,260	4.28	350	3.81
Drumsticks	140	1.69	90	1.49	400	1.95
Thighs			90	1.79	40	2.29
Wings			40	1.55	260	1.64
Necks	30	0.98	10	1.69	110	1.48
Smoked Drumsticks	210	2.00	80	2.47	50	1.91
Smoked Wings	200	1.83	40	2.19	50	1.91
Smoked Necks	190	1.69	50	1.89	50	1.66
GROUND TURKEY:	8,120	3.26	8,300	3.45	8,650	3.01
Patties	760	3.09	1,120	3.53	890	3.24
Sausage	3,230	3.23	1,590	3.41	1,320	2.86
85% lean	670	2.39	640	2.42	2,550	2.33
93% lean	2,490	3.04	3,150	3.08	2,740	2.97
Breast	970	4.61	1,800	4.58	1,150	4.60
Rolls (frsh/frz 1 lb.)	230	2.04	160	2.35	250	1.88
Specialty ^{5/}						
Patties	10	3.99	650	3.58		
93-94% lean	430	4.18	610	3.56	140	3.49
Breast	250	7.28	200	5.99		

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

This Week's Turkey Feature Highlights

Retail featuring is less active following the Fourth of July holiday. Offerings on frozen whole turkeys increase; prices are lower. Fewer stores offer frozen bone-in breasts and offerings on fresh split breasts have disappeared. Shoppers looking for boneless white parts will find fewer ads in this week's circulars. Offerings decline on all boneless white parts; tenders are the lowest priced item this week for consumers watching their pocketbooks. More stores are offering dark parts, mostly smoked parts at lower prices. Ground turkey remains a popular choice and feature activity is only slightly less active than last week. Sausage is showing up in more ads than any of the other grinds and prices are lower, providing a tasty choice for grilling. Market activity following the holiday is less active on deli items. Service deli offerings decline on whole muscle meats and value products, increase on the mid-priced thin slicing meats. Self-service deli promotions are fewer in number. Stores increase offerings on the lower priced private brands while featuring fewer processor 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 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/}	58.2% of 4,400 sampled outlets			10.9% of 6,000 sampled outlets			25.7% of 4,000 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			3.5% of stores w/ no-price promotions			3.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,180			Activity Index = 1,450			Activity Index = 1,890		
	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							1.19	160	1.19
" - Toms							1.19	160	1.19
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.97	10	1.97	1.29 - 1.97	200	1.94	1.28 - 1.99	120	1.37
Split, bone-in									
Fresh									
Rotisserie	8.99	10	8.99						
Boneless, whole				4.97	10	4.97			
Cutlets	4.54 - 5.19	550	4.98				5.45	20	5.45
Cutlets, thin sliced	5.49	20	5.49						
Strips	4.99	180	4.99						
Tenders	3.92	30	3.92				4.79	20	4.79
Marinated Tenders	4.26 - 4.79	270	4.44	4.26	40	4.26	3.73	10	3.73
Drumsticks				1.69	50	1.69	1.69	90	1.69
Thighs									
Wings									
Necks				0.98	20	0.98			
Smoked Drumsticks	1.99 - 2.49	200	2.02						
Smoked Wings	1.79 - 2.49	200	1.83						
Smoked Necks	1.69	190	1.69						
GROUND TURKEY:									
Patties	2.50 - 4.99	240	3.45	2.50 - 3.99	300	2.82	3.00 - 3.48	200	3.01
Sausage	2.39 - 3.99	2,170	3.15	2.80 - 3.99	510	3.46	2.87 - 3.49	130	3.39
85% lean	1.99 - 3.19	410	2.38	2.00 - 3.19	190	2.40	2.40 - 2.50	30	2.44
93% lean	2.68 - 3.84	920	3.17	2.68 - 3.00	90	2.85	2.40 - 3.99	490	2.76
Breast (99-100% lean)	3.84 - 5.38	380	4.79	4.61	40	4.61	4.47	10	4.47
Rolls (frsh/frz 1 lb.)							1.50 - 2.98	180	2.12
Specialty ^{5/}									
Patties	3.99	10	3.99						
93-94% lean	3.49 - 4.69	270	4.02				3.33 - 4.69	150	4.47
Breast	5.99 - 7.49	120	7.27				7.49	120	7.49



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

	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/}	14.0% of 4,000 sampled outlets			43.1% of 2,900 sampled outlets			48.6% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			18.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 640			Activity Index = 920			Activity Index = 810		
	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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.59 - 1.79	50	1.70						
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				3.99	190	3.99			
Marinated Tenders	3.99	30	3.99						
Drumsticks									
Thighs									
Wings									
Necks	0.98	10	0.98						
Smoked Drumsticks	1.49	10	1.49						
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.50	20	3.50			
Sausage	2.87 - 3.02	50	2.93	2.87 - 3.99	170	3.49	3.27	200	3.27
85% lean	2.39 - 2.49	40	2.43						
93% lean	2.79 - 3.99	400	3.19	2.80 - 3.49	70	3.25	2.80 - 3.19	520	2.96
Breast (99-100% lean)				3.99 - 5.99	470	4.39	3.99 - 5.99	70	5.22
Rolls (frsh/frz 1 lb.)	1.50 - 1.98	50	1.77						
Specialty ^{5/}									
Patties									
93-94% lean							4.29	10	4.29
Breast							4.99	10	4.99



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jul 06, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/06 thru 07/12.

(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		84.7% of 4,400 sampled outlets Activity Index = 14,600			38.7% of 6,000 sampled outlets Activity Index = 4,540		
Feature Rate ^{1/}	59.2% of 22,500 stores		73.6% of 22,500 stores		78.8% of 19,500 stores		Price Range (\$/pound)			Price Range (\$/pound)		
Activity Index ^{2/}	39,570		46,890		43,510		Summary Stores Wtd Avg			Summary Stores Wtd Avg		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	3,380	8.55	8,230	7.80	5,710	7.79	5.98 - 9.99	1,360	8.90	6.99 - 10.49	780	8.77
Private Brand	2,440	7.76	3,640	7.62	1,830	7.17	6.99 - 10.49	2,060	7.74			
Category 2												
Processor Brand	3,620	5.96	4,210	5.65	5,230	5.82	4.99 - 6.99	1,160	6.13	4.59 - 6.49	240	5.57
Private Brand	4,530	6.93	3,370	6.47	3,710	6.61	5.97 - 7.99	1,500	6.77	6.49 - 6.99	180	6.76
Category 3												
Processor Brand	1,560	3.78	820	3.96	870	3.96	2.88 - 3.99	220	3.68	2.88 - 3.99	90	3.33
Private Brand	270	5.23	1,560	5.72	40	4.48	3.98 - 5.99	170	5.49	3.99	20	3.99
Turkey Ham												
Processor Brand	400	3.08	270	2.62	400	2.95	3.49 - 4.99	100	4.24	4.99	20	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	200	4.49	80	4.49	200	4.72	3.99 - 4.99	180	4.26	4.99	10	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,670	7.71	2,540	6.99	4,010	7.35	5.99 - 10.29	1,580	7.69	6.49 - 8.99	260	8.22
Private Brand	2,410	7.44	2,470	7.18	3,230	7.20	6.99 - 8.99	1,020	7.40	6.99	110	6.99
Category 2												
Processor Brand	690	5.54	50	5.30	360	5.48	3.99 - 5.99	440	5.42			
Private Brand	470	6.67	330	5.98	120	5.49						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	4,710	3.14	8,090	3.25	7,850	3.14	2.50 - 3.99	910	3.10	2.50 - 3.99	1,190	3.32
Private Brand	3,440	2.96	1,470	2.98	1,390	3.06	2.50 - 3.99	1,270	2.96	2.50 - 3.00	250	2.87
Turkey 16 oz												
Processor Brand	940	5.19	270	4.37	570	5.36	4.99	510	4.99	4.99	70	4.99
Private Brand			160	4.99								
Chicken 7-10 oz												
Processor Brand	4,510	3.16	7,900	3.26	6,610	3.17	2.50 - 3.99	850	3.15	2.75 - 3.99	1,180	3.33
Private Brand	3,330	2.96	1,430	2.99	1,380	3.06	2.50 - 3.99	1,270	2.96	2.50 - 3.00	140	2.76

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)		
	70.0% of 4,000 sampled outlets			54.9% of 4,000 sampled outlets			47.1% of 2,900 sampled outlets			73.0% of 1,200 sampled outlets		
	Activity Index = 10,270			Activity Index = 5,550			Activity Index = 2,860			Activity Index = 1,750		
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	6.98 - 9.99	870	8.11	6.49 - 10.49	250	7.54	6.99 - 9.49	70	7.50	6.99 - 12.99	50	9.39
Private Brand	6.99 - 7.49	50	7.08	6.99 - 7.99	210	7.44	8.99	120	8.99			
Category 2												
Processor Brand	4.49 - 6.99	1,530	6.01	4.98 - 6.98	410	5.94	4.99	170	4.99	4.99 - 6.98	110	5.92
Private Brand	5.99 - 6.99	590	6.37	5.99 - 7.99	930	7.38	6.99 - 7.99	590	7.50	5.99 - 7.49	740	6.71
Category 3												
Processor Brand	2.99 - 3.99	910	3.83	3.49 - 5.00	260	3.78	2.99 - 3.99	80	3.93			
Private Brand	4.99	80	4.99									
Turkey Ham												
Processor Brand	2.99	10	2.99	1.99 - 2.49	230	2.25	3.99	40	3.99			
Private Brand												
Turkey Pastrami												
Processor Brand	7.99	10	7.99									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 8.99	630	7.55	5.99 - 8.99	170	7.70	7.49 - 8.99	30	8.05			
Private Brand	5.99 - 8.99	480	7.74	6.99 - 7.99	550	7.29	7.49	40	7.49	7.49	210	7.49
Category 2												
Processor Brand	4.39 - 5.99	250	5.75									
Private Brand	5.99 - 6.49	270	6.42							6.99	200	6.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,110	2.72	1.98 - 2.99	600	3.02	2.69 - 3.99	700	3.71	3.00	200	3.00
Private Brand	2.50 - 3.50	1,080	2.97	2.99 - 3.00	650	3.00	2.99	170	2.99	3.00	20	3.00
Turkey 16 oz												
Processor Brand	4.98 - 5.29	210	5.26	5.59 - 5.99	150	5.88						
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,110	2.72	1.98 - 3.59	490	2.99	2.69 - 3.99	680	3.73	3.00	200	3.00
Private Brand	2.50 - 3.50	1,080	2.97	2.99 - 3.00	650	3.00	2.99	170	2.99	3.00	20	3.00

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)