



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/13 thru 07/19.**

Fri. Jul 13, 2012

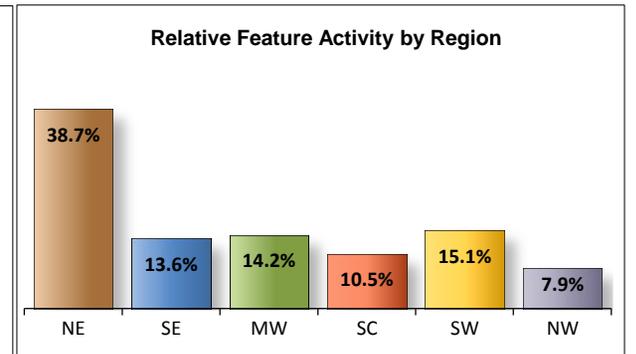
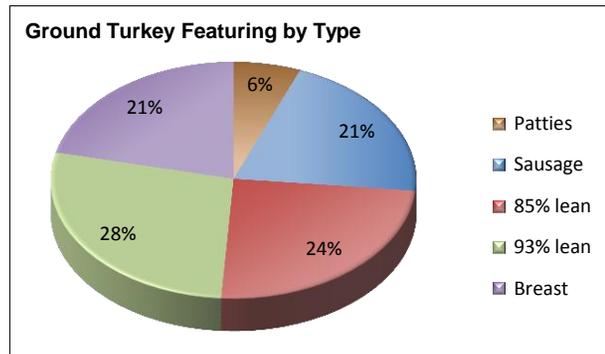
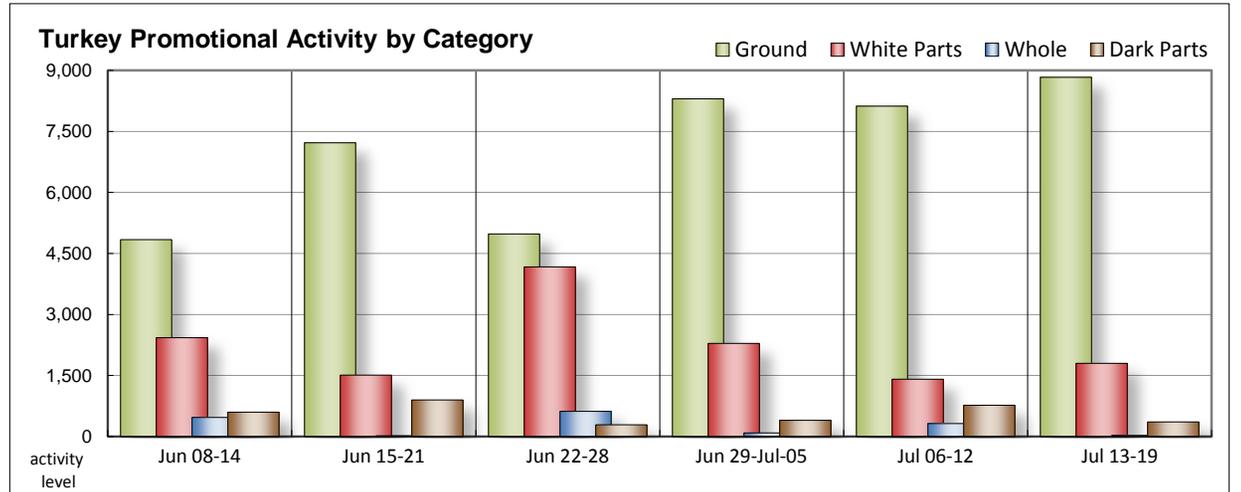
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>39.2% of 22,500 outlets</b>		<b>29.6% of 22,500 outlets</b>		<b>44.6% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>2.5%</b>		<b>4.1%</b>		<b>7.9%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>12,000</b>		<b>11,890</b>		<b>12,270</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens	10	1.59			30	1.59
" - Toms					20	1.59
Frozen - Hens	10	0.99	160	1.19		
" - Toms	10	0.99	160	1.19		
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	10	3.99				
Frozen	840	1.61	380	1.73	550	1.79
Split, bone-in						
Fresh	10	3.29			10	2.99
Rotisserie	330	7.59	10	8.99	710	7.00
Boneless, whole			10	4.97	80	4.64
Cutlets	230	4.91	570	5.00	810	4.20
Cutlets, thin sliced	90	4.99	20	5.49		
Strips			180	4.99		
Tenders	290	4.85	240	4.05	580	4.12
Marinated Tenders	570	3.89	350	4.36	990	4.07
Drumsticks	100	1.98	140	1.69	370	1.63
Thighs	40	2.39			160	1.89
Wings	30	1.66			270	1.73
Necks	40	1.18	30	0.98	30	1.65
Smoked Drumsticks	30	1.78	210	2.00	10	2.25
Smoked Wings	70	1.79	200	1.83	10	2.25
Smoked Necks	50	1.86	190	1.69	10	2.25
<b>GROUND TURKEY:</b>	<b>8,830</b>	<b>3.27</b>	<b>8,120</b>	<b>3.26</b>	<b>6,680</b>	<b>2.99</b>
Patties	530	3.39	760	3.09	340	3.09
Sausage	1,820	3.37	3,230	3.23	540	3.02
85% lean	2,160	2.38	670	2.39	1,920	2.20
93% lean	2,430	3.05	2,490	3.04	2,570	2.83
Breast	1,890	4.58	970	4.61	1,310	4.44
Rolls (frsh/frz 1 lb.)	210	2.27	230	2.04	480	2.28
<b>Specialty</b> <sup>5/</sup>						
Patties	20	4.49	10	3.99	190	5.65
93-94% lean	160	3.75	430	4.18	270	4.00
Breast	20	5.79	250	7.28	10	4.99

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

**This Week's Turkey Feature Highlights**

More stores are featuring turkey this week, an improvement over last week's lackluster holiday promotional activity. Offerings decline on whole turkeys, increase on bone-in breasts. Rotisserie breasts are showing up in more ads and advertised prices are lower; a rotisserie breasts would be a good alternative to cooking. Promotional activity declines on all boneless white parts except marinated tenders; lower prices on marinated tenders are sure to tempt consumers looking for a deal. Fewer stores offer dark parts. Featuring is more active on grinds, especially on the 85% lean which is the lowest priced item. Offerings increase on deli items with more emphasis on turkey this week. Service deli prices are mostly lower on whole muscle meats; mixed on thin slicing and shaving meats. Features on self-service deli are very active; offerings increase on processor brands, decline on private brands. This is a good time to bring out the sandwiches and deli trays and avoid cooking in this hot weather.



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 <sup>1/</sup>	64.1% of 4,400 sampled outlets			34.4% of 6,000 sampled outlets			28.2% of 4,000 sampled outlets		
Special Rate <sup>4/</sup>	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			3.6% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 5,060			Activity Index = 2,420			Activity Index = 1,690		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.59	10	1.59						
" - Toms									
Frozen - Hens							0.99	10	0.99
" - Toms							0.99	10	0.99
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh									
Frozen	1.69 - 1.97	120	1.72	1.68 - 1.97	220	1.93	0.99 - 1.69	370	1.36
Split, bone-in									
Fresh	3.29	10	3.29						
Rotisserie	6.74 - 6.89	90	6.81						
Boneless, whole									
Cutlets	3.29 - 4.99	230	4.91						
Cutlets, thin sliced							4.99	90	4.99
Strips									
Tenders	3.99 - 4.99	270	4.92				3.99	20	3.99
Marinated Tenders	3.19 - 4.26	350	4.17				4.26	10	4.26
Drumsticks	1.99	60	1.99				1.79 - 2.69	30	2.21
Thighs	2.29	30	2.29				2.69	10	2.69
Wings							1.79 - 1.99	20	1.90
Necks				0.98	20	0.98	1.79	10	1.79
Smoked Drumsticks				1.79	20	1.79	1.75	10	1.75
Smoked Wings	1.79	50	1.79	1.79	20	1.79			
Smoked Necks	1.99	20	1.99	1.79	20	1.79	1.75	10	1.75
<b>GROUND TURKEY:</b>									
Patties	2.99 - 3.79	270	3.17	3.69	10	3.69	2.99 - 3.50	50	3.32
Sausage	2.55 - 3.99	1,320	3.40	4.49	90	4.49	2.80 - 3.49	180	3.11
85% lean	1.99 - 3.84	350	2.38	2.33 - 2.49	1,320	2.39	2.33 - 2.79	230	2.40
93% lean	2.31 - 4.99	1,280	3.13	2.08 - 3.59	210	2.83	2.49 - 3.45	410	3.13
Breast (99-100% lean)	3.84 - 4.79	410	4.68	3.84 - 4.79	450	4.14	4.16 - 4.79	70	4.60
Rolls (frsh/frz 1 lb.)	2.00	10	2.00	3.50	40	3.50	1.59 - 1.99	130	1.97
<b>Specialty <sup>5/</sup></b>									
Patties	4.49	20	4.49						
93-94% lean	3.49 - 5.59	160	3.75						
Breast							5.79	20	5.79



(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)		
<b>Feature Rate</b> <sup>1/</sup>	26.7% of 4,000 sampled outlets			40.7% of 2,900 sampled outlets			46.8% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	2.8% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			25.9% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 1,250			Activity Index = 1,300			Activity Index = 280		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh							3.99	10	3.99
Frozen	1.49 - 1.79	130	1.67						
Split, bone-in									
Fresh									
Rotisserie	7.49 - 7.99	120	7.79	7.99	120	7.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.99	20	3.99	3.33	190	3.33			
Drumsticks	1.19	10	1.19						
Thighs									
Wings	1.19	10	1.19						
Necks	0.98	10	0.98						
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.99	110	3.99	3.00 - 3.50	90	3.31			
Sausage	2.39 - 3.27	180	2.99	2.40 - 4.99	40	2.91	3.27	10	3.27
85% lean	2.08	20	2.08	2.33 - 2.40	200	2.34	2.39 - 2.50	40	2.42
93% lean	2.08 - 3.19	180	2.88	2.80 - 3.50	350	2.84			
Breast (99-100% lean)	3.99 - 4.79	430	4.67	4.79 - 5.19	310	4.83	4.79 - 4.99	220	4.80
Rolls (frsh/frz 1 lb.)	1.98	30	1.98						
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

Fri. Jul 13, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/13 thru 07/19.

(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		93.3% of 4,400 sampled outlets			68.5% of 6,000 sampled outlets		
Feature Rate <sup>1/</sup>	73.4% of 22,500 stores		59.2% of 22,500 stores		70.9% of 19,500 stores		<b>Activity Index = 14,600</b>			<b>Activity Index = 9,890</b>		
Activity Index <sup>2/</sup>	<b>44,340</b>		<b>39,570</b>		<b>44,510</b>		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6,750	7.86	3,380	8.55	3,600	7.48	5.99 - 9.99	3,060	8.06	6.99 - 8.99	830	8.80
Private Brand	3,470	7.21	2,440	7.76	1,330	7.12	6.49 - 7.99	2,780	7.21	6.99 - 7.99	130	7.50
<b>Category 2</b>												
Processor Brand	4,890	6.11	3,620	5.96	5,090	6.26	4.98 - 6.99	1,060	6.28	4.99 - 6.99	2,240	6.15
Private Brand	3,430	6.60	4,530	6.93	6,120	6.42	5.49 - 5.99	290	5.70	6.99	120	6.99
<b>Category 3</b>												
Processor Brand	1,510	4.41	1,560	3.78	1,760	4.02	2.99 - 4.99	850	4.80	3.99	130	3.99
Private Brand	310	4.47	270	5.23	320	4.24	4.98	40	4.98	3.99	20	3.99
<b>Turkey Ham</b>												
Processor Brand	180	3.30	400	3.08	440	3.33	2.99 - 4.49	90	3.60			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	280	4.04	200	4.49	510	7.04	4.99	30	4.99			
Private Brand	120	4.99										
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,820	7.73	2,670	7.71	3,700	7.69	5.88 - 8.99	1,490	8.01	4.99 - 8.99	430	7.29
Private Brand	920	6.69	2,410	7.44	1,450	6.97	6.99	510	6.99	6.99	70	6.99
<b>Category 2</b>												
Processor Brand	430	5.23	690	5.54	390	6.23	4.88 - 5.99	90	5.05			
Private Brand	420	4.63	470	6.67	440	6.54	2.99	70	2.99			
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	8,270	2.94	4,710	3.14	7,300	3.23	2.19 - 3.99	1,670	3.24	2.50 - 4.50	2,840	2.93
Private Brand	1,230	3.12	3,440	2.96	2,990	3.11	2.50 - 3.33	650	3.03	2.50 - 3.50	140	3.23
<b>Turkey 16 oz</b>												
Processor Brand	840	5.26	940	5.19	1,470	5.68	4.99 - 6.99	190	5.33	4.99 - 5.99	120	5.83
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	7,340	2.90	4,510	3.16	5,190	3.22	2.19 - 3.99	1,080	3.09	2.50 - 4.50	2,780	2.93
Private Brand	1,130	3.09	3,330	2.96	2,410	3.18	2.50 - 3.33	650	3.03	2.50	40	2.50

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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Fri. Jul 13, 2012

Feature Rate <sup>1/</sup>	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)		
	80.2% of 4,000 sampled outlets			59.5% of 4,000 sampled outlets			63.0% of 2,900 sampled outlets			72.7% of 1,200 sampled outlets		
	Activity Index = 8,350			Activity Index = 5,730			Activity Index = 3,860			Activity Index = 1,910		
Activity Index <sup>2/</sup>	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	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 10.49	570	7.20	5.99 - 8.29	630	7.43	6.99 - 8.99	1,020	7.44	6.98 - 9.99	640	7.35
Private Brand	6.79 - 7.99	460	7.03	7.49 - 7.99	100	7.71						
<b>Category 2</b>												
Processor Brand	4.89 - 6.99	590	6.12	4.29 - 5.99	750	5.78	4.99 - 5.99	220	5.75	7.99	30	7.99
Private Brand	4.98 - 6.99	1,120	6.03	6.99 - 7.99	940	6.78	6.99 - 7.99	590	7.50	6.99 - 7.45	370	7.05
<b>Category 3</b>												
Processor Brand	2.85 - 4.94	260	3.99	2.79 - 3.99	170	3.76	3.49	70	3.49	4.48 - 4.99	30	4.62
Private Brand	3.99 - 4.98	110	4.08	2.99	20	2.99	4.99	120	4.99			
<b>Turkey Ham</b>												
Processor Brand	2.99	10	2.99	2.99	10	2.99	2.99	70	2.99			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.98	20	3.98	3.97 - 3.99	170	3.98	3.29	20	3.29	3.98	40	3.98
Private Brand					120	4.99						
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 7.99	500	6.94	6.98 - 10.99	160	8.37	7.99	240	7.99			
Private Brand	5.49	200	5.49	6.99 - 7.99	140	7.15						
<b>Category 2</b>												
Processor Brand	3.99 - 6.98	340	5.28									
Private Brand	3.98 - 4.99	310	4.95	4.99	40	4.99						
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.19 - 3.99	1,630	2.93	1.99 - 2.49	1,260	2.72	2.00 - 3.00	670	2.73	2.67 - 2.99	200	2.82
Private Brand	2.50 - 2.99	230	2.60	2.79	10	2.79				3.99	200	3.99
<b>Turkey 16 oz</b>												
Processor Brand	5.29	180	5.29	4.89 - 5.49	180	5.03	4.99	170	4.99			
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.19 - 3.99	1,590	2.94	1.99 - 2.49	1,020	2.67	2.00 - 3.00	670	2.73	2.67 - 2.99	200	2.82
Private Brand	2.50 - 2.99	230	2.60	2.79	10	2.79				3.99	200	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)

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