



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/31 thru 09/06.

Fri. Aug 31, 2012

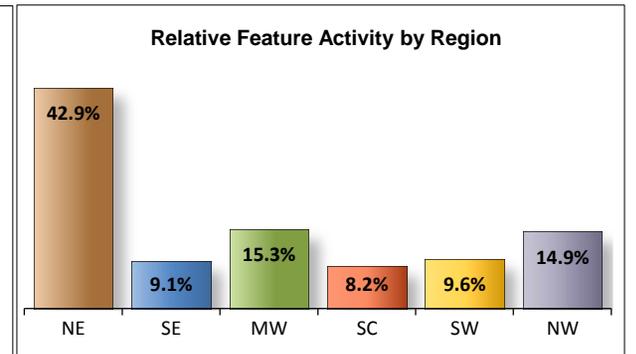
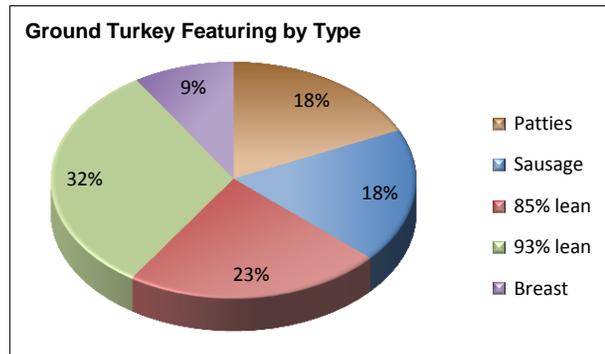
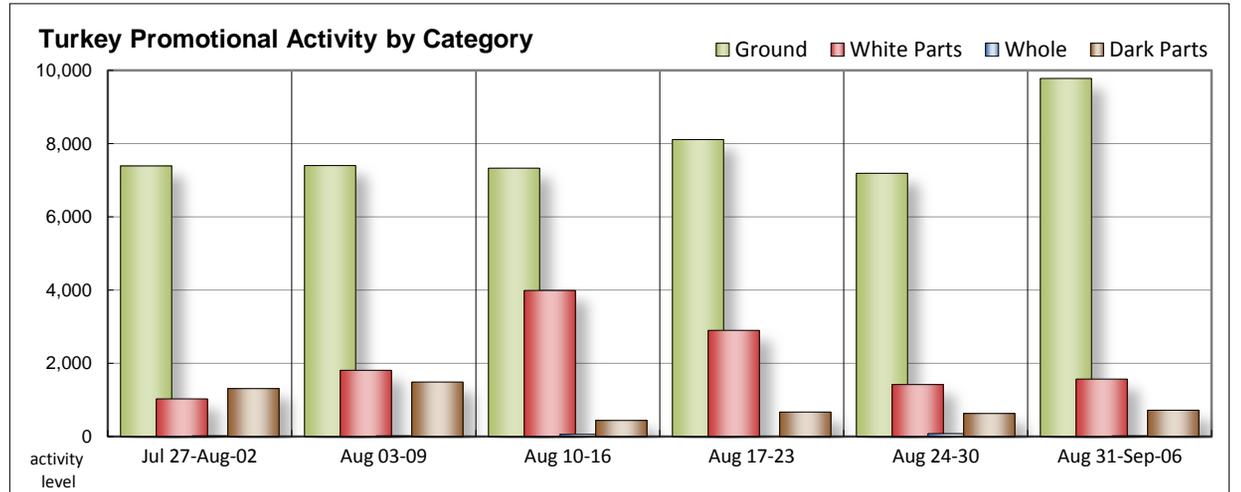
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY			
	THIS WEEK	LAST WEEK	LAST YEAR
Feature Rate ^{1/}	36.7% of 22,500 outlets	33.9% of 22,500 outlets	38.6% of 19,500 outlets
Special Rate ^{4/}	2.7%	5.8%	5.0%
Activity Index ^{2/}	13,550	10,760	15,690
3/	Stores Wtd Avg	Stores Wtd Avg	Stores Wtd Avg
WHOLE BIRDS:			
Fresh - Hens		60 1.79	20 1.49
" - Toms			20 1.49
Frozen - Hens	10 1.69	10 1.49	
" - Toms	10 1.69	10 1.69	
PARTS:			
Breast:			
Bone-in, whole			
Fresh	20 2.89	30 2.62	10 2.99
Frozen	830 2.03	100 1.70	380 1.61
Split, bone-in			
Fresh	10 2.79	20 2.99	10 2.98
Rotisserie	630 6.98	260 8.72	600 8.10
Boneless, whole	10 4.99	30 5.16	660 4.09
Cutlets	50 5.18	520 5.01	840 3.97
Cutlets, thin sliced		120 4.82	
Strips		190 4.88	
Tenders	20 4.55	150 4.86	650 4.09
Marinated Tenders	840 4.66	590 4.08	770 4.08
Drumsticks	230 1.80	220 1.94	370 1.78
Thighs	30 2.29	190 2.03	
Wings	120 1.77	190 1.97	70 2.51
Necks	10 1.59		60 1.99
Smoked Drumsticks	110 2.10	10 1.95	120 2.04
Smoked Wings	110 2.10	10 1.95	30 2.22
Smoked Necks	110 1.92	10 1.58	20 1.69
GROUND TURKEY:	9,780 3.15	7,190 3.44	9,920 3.13
Patties	1,780 3.29	810 3.21	3,220 3.29
Sausage	1,800 3.04	1,160 3.04	2,690 3.04
85% lean	2,220 2.49	1,110 2.62	1,100 2.45
93% lean	3,100 3.04	2,210 3.04	2,340 2.93
Breast	880 5.22	1,900 4.66	570 4.82
Rolls (frsh/frz 1 lb.)	140 2.23	370 1.93	90 2.35
Specialty ^{5/}			
Patties	20 4.14	180 5.00	
93-94% lean	410 4.00	260 4.40	140 3.49
Breast	50 6.51	40 5.99	

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

This Week's Turkey Feature Highlights

Feature activity increases going into the Labor Day weekend allowing a variety of options to fire up the grill. Whole turkeys remain barely visible as expected for this time of the year. Frozen bone-in breast offerings and prices increase. Rotisserie breasts are viewed more often at lower pricing. Marinated tenders gain attention, while the balance of white items decline significantly; prices trend higher for most items. Features of fresh drums and all smoked parts are more active. Prices levels for fresh drums decline, while smoked parts are offered at higher values. Once again ground turkey promotions gain momentum with 93% lean most prevalent. Average price levels for 93% lean and sausage are unchanged from a week ago, 85% lean decreases, ground breast and rolls are higher. Deli feature activity slows but there is still plenty of opportunity to pack a picnic lunch for the Holiday. Thick slicing meat offerings increase. On an average you will pay more for processor brands, while private labels are lower. Self-service deli offerings are similar to last week but pricing trends higher.



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/}	63.7% of 4,400 sampled outlets			26.9% of 6,000 sampled outlets			28.3% of 4,000 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,670			Activity Index = 1,940			Activity Index = 2,170		
	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							1.69	10	1.69
" - Toms							1.69	10	1.69
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.79 - 2.99	20	2.89						
Frozen	1.99	510	1.99	1.99	70	1.99	1.89 - 2.29	200	2.27
Split, bone-in									
Fresh	2.79	10	2.79						
Rotisserie	6.89 - 6.99	560	6.98	6.99	70	6.99			
Boneless, whole	4.99	10	4.99						
Cutlets	5.19	30	5.19						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.73 - 5.33	540	4.49				5.59	180	5.59
Drumsticks	1.79	110	1.79				1.59 - 2.29	110	1.77
Thighs							2.29	20	2.29
Wings	1.79	110	1.79				1.59	10	1.59
Necks							1.59	10	1.59
Smoked Drumsticks	1.99 - 2.49	60	2.06	2.19	40	2.19	1.99	10	1.99
Smoked Wings	1.99 - 2.49	60	2.06	2.19	40	2.19	1.99	10	1.99
Smoked Necks	1.99	70	1.99	1.79	40	1.79			
GROUND TURKEY:									
Patties	2.39 - 3.99	1,190	3.21	3.00 - 3.50	140	3.25	2.49 - 3.50	90	3.22
Sausage	2.31 - 3.99	730	2.99	2.80 - 3.00	50	2.86	2.86 - 3.50	750	3.22
85% lean	2.30 - 3.07	400	2.71	2.00 - 2.83	1,360	2.38	2.39 - 3.00	180	2.51
93% lean	2.30 - 3.99	1,060	3.19	2.30 - 3.29	120	2.87	2.49 - 3.29	500	3.04
Breast (99-100% lean)	3.99 - 5.99	750	5.30						
Rolls (frsh/frz 1 lb.)				1.50	10	1.50	1.67 - 2.99	50	2.49
Specialty ^{5/}									
Patties	4.59	10	4.59				3.69	10	3.69
93-94% lean	3.99 - 4.99	410	4.00						
Breast	6.99	30	6.99				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)		
Feature Rate ^{1/}	26.4% of 4,000 sampled outlets			35.4% of 2,900 sampled outlets			52.9% of 1,200 sampled outlets		
Special Rate ^{4/}	6.2% of stores w/ no-price promotions			9.7% of stores w/ no-price promotions			0.8% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,160			Activity Index = 980			Activity Index = 630		
	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	1.57 - 1.79	50	1.61						
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	5.17	20	5.17						
Cutlets, thin sliced									
Strips									
Tenders	4.55	20	4.55						
Marinated Tenders	3.73 - 4.26	120	4.06						
Drumsticks	2.29	10	2.29						
Thighs	2.29	10	2.29						
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.00	140	3.00	3.50 - 4.99	210	3.98	2.99	10	2.99
Sausage	2.39 - 3.02	220	2.61	2.87 - 3.19	30	3.02	3.27	20	3.27
85% lean	2.23 - 3.00	80	2.41				2.79	200	2.79
93% lean	2.40 - 3.99	450	3.04	2.80 - 3.99	660	2.94	2.80	310	2.80
Breast (99-100% lean)				4.99 - 5.19	40	5.15	3.99 - 4.79	90	4.57
Rolls (frsh/frz 1 lb.)	1.98 - 1.99	40	1.98	2.33	40	2.33			
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 31, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/31 thru 09/06.

(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		83.3% of 4,400 sampled outlets Activity Index = 12,460			59.1% of 6,000 sampled outlets Activity Index = 6,400		
Feature Rate ^{1/}	68.3% of 22,500 stores		75.1% of 22,500 stores		75.4% of 19,500 stores							
Activity Index ^{2/}	41,340		45,940		41,700							
	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	4,760	7.93	3,900	7.88	4,280	7.86	5.99 - 9.99	2,480	8.04	6.99 - 8.99	1,060	8.01
Private Brand	3,290	7.26	3,010	7.75	1,280	7.81	6.99 - 8.99	1,230	7.81	6.99	720	6.99
Category 2												
Processor Brand	5,280	5.96	3,840	5.84	4,920	6.16	4.98 - 6.99	1,080	6.23	4.99 - 6.99	1,850	6.43
Private Brand	1,950	6.05	3,900	6.48	4,160	6.71	4.99 - 6.99	1,630	6.03	5.99	40	5.99
Category 3												
Processor Brand	880	3.78	990	4.09	1,060	3.84	2.99 - 4.99	140	3.77	2.68 - 3.99	80	3.39
Private Brand	190	5.34	1,380	4.80			3.98 - 5.99	190	5.34			
Turkey Ham												
Processor Brand	140	3.87	300	3.63	250	3.40	3.49 - 3.99	100	3.88			
Private Brand												
Turkey Pastrami												
Processor Brand	60	4.57	90	4.31	130	5.38	3.99 - 4.99	60	4.57			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,340	7.31	3,540	7.35	2,680	7.27	6.49 - 8.99	1,120	7.60	4.99 - 8.99	640	6.85
Private Brand	2,020	6.62	2,970	6.90	650	6.86	5.99 - 7.99	1,520	6.80			
Category 2												
Processor Brand	120	5.35	140	5.09	80	5.10	4.99 - 5.99	40	5.52	5.99	10	5.99
Private Brand	340	5.88	720	5.41	280	6.49						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,570	3.01	8,150	2.97	10,790	3.37	2.49 - 3.99	1,130	3.51	2.50 - 3.69	960	3.02
Private Brand	520	3.07	2,010	2.82	440	3.04	2.48 - 3.33	310	3.28	2.50	10	2.50
Turkey 16 oz												
Processor Brand	130	5.46	1,790	5.07	460	5.02	5.99	40	5.99	4.99 - 5.99	80	5.12
Private Brand												
Chicken 7-10 oz												
Processor Brand	9,230	3.01	7,420	2.96	9,800	3.41	2.49 - 3.99	1,080	3.51	2.50 - 3.69	940	3.02
Private Brand	520	3.07	1,790	2.81	440	3.04	2.48 - 3.33	310	3.28	2.50	10	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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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)		
	74.9% of 4,000 sampled outlets			61.0% of 4,000 sampled outlets			63.8% of 2,900 sampled outlets			72.7% of 1,200 sampled outlets		
	Activity Index = 10,020			Activity Index = 6,210			Activity Index = 4,300			Activity Index = 1,950		
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	5.99 - 10.49	480	7.10	6.79 - 9.49	440	7.77	7.99 - 9.99	250	8.35	6.98 - 12.99	50	8.23
Private Brand	5.78 - 9.99	1,060	6.84	6.99 - 7.99	280	7.15						
Category 2												
Processor Brand	4.39 - 6.99	920	5.81	4.99 - 6.99	520	5.38	4.99 - 5.99	640	5.09	4.99 - 6.99	270	5.30
Private Brand	4.99 - 6.99	280	6.21									
Category 3												
Processor Brand	2.95 - 4.47	430	3.96	2.99 - 3.98	30	3.57	2.69 - 3.99	90	2.87	3.99 - 4.99	110	4.22
Private Brand												
Turkey Ham												
Processor Brand							2.79 - 3.99	40	3.85			
Private Brand												
Turkey Pastrami												
Processor Brand												
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.95 - 8.99	330	6.44	6.98 - 9.49	240	8.35				6.99	10	6.99
Private Brand	5.99	480	5.99	7.99	20	7.99						
Category 2												
Processor Brand	3.98 - 5.99	70	5.17									
Private Brand	5.78 - 5.99	340	5.88									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.28 - 3.99	2,730	2.91	2.19 - 2.99	2,340	2.90	2.48 - 3.50	1,640	2.96	2.50 - 3.99	770	3.07
Private Brand	2.50 - 3.67	120	3.04	1.99 - 2.50	80	2.34						
Turkey 16 oz												
Processor Brand					10	5.99						
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.28 - 3.99	2,660	2.92	2.19 - 2.99	2,170	2.90	2.48 - 3.50	1,640	2.96	2.50 - 3.99	740	3.09
Private Brand	2.50 - 3.67	120	3.04	1.99 - 2.50	80	2.34						

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)