



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/14 thru 09/20.**

Fri. Sep 14, 2012

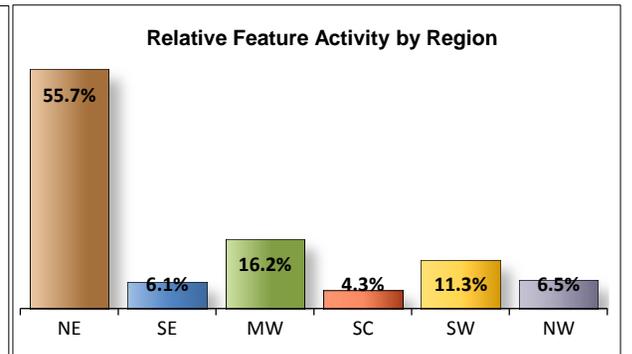
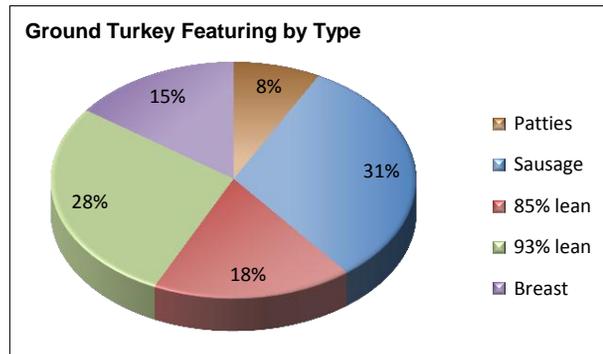
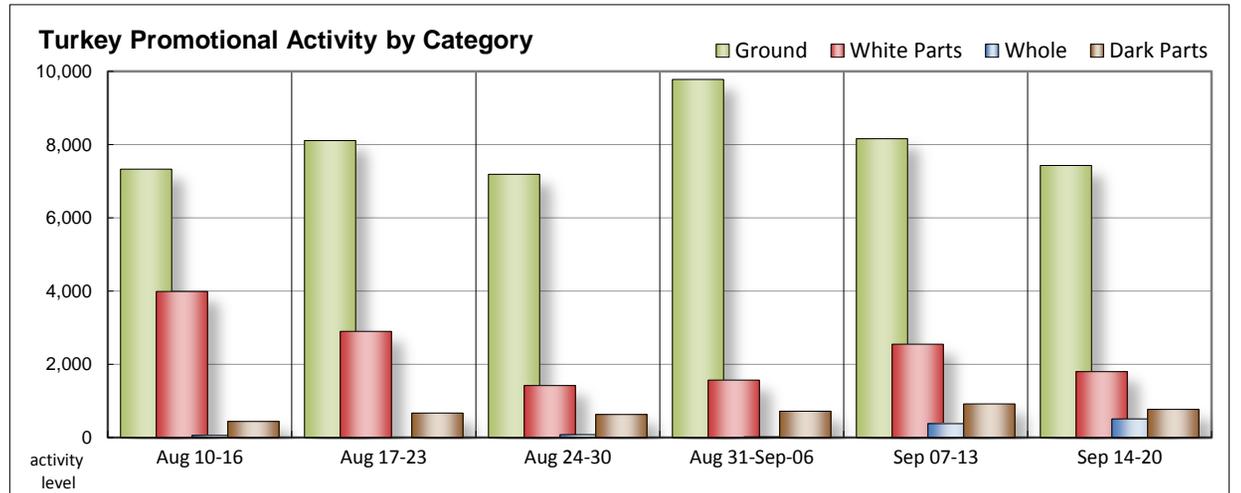
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>35.4% of 22,500 outlets</b>		<b>35.1% of 22,500 outlets</b>		<b>41.0% of 19,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>7.5%</b>		<b>0.8%</b>		<b>10.5%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>12,490</b>		<b>12,730</b>		<b>10,670</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	380	1.81	280	1.77	50	1.59
" - Toms	130	1.61	100	1.49	50	1.59
Frozen - Hens					160	1.11
" - Toms					160	1.11
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	280	2.57	200	3.09	110	2.53
Frozen	550	1.71	680	1.86	1,140	1.68
Split, bone-in						
Fresh			10	3.49	160	2.69
Rotisserie	270	7.75	530	7.73	1,040	6.62
Boneless, whole	110	5.09			30	4.66
Cutlets	340	5.19	630	4.84	640	4.80
Cutlets, thin sliced	90	4.99			50	4.54
Strips						
Tenders	160	5.08	500	4.03	20	3.99
Marinated Tenders	1,350	4.35	390	4.40	170	4.41
Drumsticks	280	1.91	210	1.99	150	1.40
Thighs	100	2.11	190	1.99	40	2.29
Wings	190	2.02	220	2.00	30	1.49
Necks						
Smoked Drumsticks	60	1.97	130	1.96	90	1.59
Smoked Wings	60	1.89	130	1.96	90	1.83
Smoked Necks	80	1.79	40	1.89	20	1.69
<b>GROUND TURKEY:</b>	<b>7,430</b>	<b>3.26</b>	<b>8,160</b>	<b>3.51</b>	<b>5,870</b>	<b>3.05</b>
Patties	580	3.10	610	3.17	360	3.01
Sausage	2,350	3.25	650	3.52	1,230	2.93
85% lean	1,310	2.31	580	2.57	1,540	2.35
93% lean	2,070	3.11	4,120	3.29	1,730	2.95
Breast	1,120	4.71	2,200	4.38	1,010	4.42
Rolls (frsh/frz 1 lb.)	280	2.59	80	2.54	380	1.83
<b>Specialty</b> <sup>5/</sup>						
Patties	130	3.49				
93-94% lean	200	3.66	220	4.02	140	3.49
Breast	20	6.99	30	6.69		

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

**This Week's Turkey Feature Highlights**

Promotional activity is less active on turkey, more active on deli. Offerings increase on fresh and frozen whole turkeys with several stores promoting kosher turkey for Rosh Hashanah. Offerings increase on fresh bone-in breasts, decline on frozen bone-in breasts; prices are lower on both. Feature activity slows on rotisserie breasts. With the cooler weather consumers might want to cook indoors, and what is tastier than marinated tenders? Ads promoting marinated tenders are plentiful and prices are lower. The balance of white parts are not getting much ad space; prices are higher. Fewer stores promote dark parts this week. Offerings on ground turkey continue to decline. This is the week to check out sausage; features are more active and prices are lower. Not interested in sausage? Promotions on 93% lean are easy to find and prices are lower. Deli activity increases on service deli, decreases on self-service deli. Stores increase promotions on service deli private brands, especially on thin slicing meats and on value products; prices are mixed. Advertised prices on self-service deli are mostly 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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(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>	71.3% of 4,400 sampled outlets			11.1% of 6,000 sampled outlets			36.7% of 4,000 sampled outlets		
Special Rate <sup>4/</sup>	2.0% of stores w/ no-price promotions			0.7% of stores w/ no-price promotions			8.1% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 7,580			Activity Index = 1,130			Activity Index = 2,000		
	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	1.49 - 1.99	380	1.81						
" - Toms	1.49 - 1.99	130	1.61						
Frozen - Hens									
" - Toms									
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	1.89 - 3.49	280	2.57						
Frozen	1.67 - 1.97	30	1.79	1.28 - 1.97	210	1.92	0.99 - 1.99	250	1.55
Split, bone-in									
Fresh									
Rotisserie	6.89 - 7.99	260	7.70						
Boneless, whole									
Cutlets	4.99 - 5.99	110	5.09						
Cutlets, thin sliced	3.63 - 5.90	290	5.26	4.59	30	4.59	4.99	20	4.99
Strips							4.99	90	4.99
Tenders	5.19	130	5.19	4.59	30	4.59			
Marinated Tenders	3.73 - 4.99	1,130	4.30	4.26 - 4.99	80	4.43	4.26 - 4.99	110	4.91
Drumsticks	1.59 - 1.99	220	1.94	1.99	30	1.99	1.99	10	1.99
Thighs	1.88 - 2.49	100	2.11						
Wings	1.59 - 2.59	150	2.02	1.99	30	1.99	1.99	10	1.99
Necks									
Smoked Drumsticks	1.99	50	1.99	1.89	10	1.89			
Smoked Wings	1.89	50	1.89	1.89	10	1.89			
Smoked Necks	1.69 - 1.99	70	1.77	1.89	10	1.89			
<b>GROUND TURKEY:</b>									
Patties	2.50 - 2.99	300	2.59	3.49	70	3.49	3.00 - 3.50	40	3.28
Sausage	2.50 - 3.99	1,950	3.24	3.50 - 3.99	100	3.94	2.80 - 3.48	70	3.25
85% lean	1.99 - 2.99	50	2.54	1.99 - 2.79	300	2.08	1.79 - 2.53	440	2.43
93% lean	2.50 - 3.84	830	3.20	3.19 - 3.49	140	3.27	2.49 - 3.33	530	2.82
Breast (99-100% lean)	3.07 - 4.79	740	4.76	4.79	80	4.79	3.32 - 4.79	240	4.62
Rolls (frsh/frz 1 lb.)							1.68 - 2.79	170	2.48
<b>Specialty <sup>5/</sup></b>									
Patties	3.49	130	3.49						
93-94% lean	3.49 - 4.99	180	3.68				3.50	20	3.50
Breast	6.99	20	6.99						



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	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>	18.8% of 4,000 sampled outlets			47.7% of 2,900 sampled outlets			45.1% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	9.0% of stores w/ no-price promotions			19.0% of stores w/ no-price promotions			26.7% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 530			Activity Index = 1,010			Activity Index = 240		
	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									
Frozen	1.39 - 1.69	60	1.62						
Split, bone-in									
Fresh									
Rotisserie				8.99	10	8.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.99	30	3.99						
Drumsticks							1.48	20	1.48
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.99 - 3.99	140	3.80	3.49 - 3.99	30	3.77			
Sausage	3.27	100	3.27	2.40 - 3.27	110	2.82	3.02 - 3.43	20	3.27
85% lean	1.67 - 2.49	30	2.16	2.33 - 2.40	460	2.34	2.39	30	2.39
93% lean	2.91 - 2.95	50	2.95	2.79 - 3.83	350	3.22	3.19	170	3.19
Breast (99-100% lean)	3.49 - 4.99	50	4.35	3.99	10	3.99			
Rolls (frsh/frz 1 lb.)	2.08 - 3.49	70	2.89	2.50	40	2.50			
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/14 thru 09/20.

(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		84.1% of 4,400 sampled outlets Activity Index = 15,420			72.2% of 6,000 sampled outlets Activity Index = 10,770		
Feature Rate <sup>1/</sup>	71.7% of 22,500 stores		73.3% of 22,500 stores		79.2% of 19,500 stores		Price Range (\$/pound)			Price Range (\$/pound)		
Activity Index <sup>2/</sup>	52,680		48,840		47,100		Summary Stores Wtd Avg			Summary Stores Wtd Avg		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,120	7.91	3,900	8.10	6,780	7.97	5.48 - 9.99	1,910	7.82	6.99 - 8.99	400	8.16
Private Brand	2,540	7.48	2,110	7.26	1,330	7.44	6.99 - 8.99	2,280	7.44	7.99	130	7.99
<b>Category 2</b>												
Processor Brand	3,620	5.85	4,510	5.92	5,730	6.03	4.79 - 6.99	840	5.63	4.99 - 6.49	700	5.60
Private Brand	7,170	6.54	2,190	6.41	5,650	6.71	4.99 - 7.99	1,890	7.02	5.98 - 6.49	1,940	6.01
<b>Category 3</b>												
Processor Brand	930	4.17	970	3.72	1,080	4.60	3.99 - 4.99	140	4.63	3.99 - 4.99	430	4.26
Private Brand	3,110	5.35	1,620	5.69	1,390	4.92	3.98 - 5.99	210	5.38	3.99 - 5.99	1,320	4.96
<b>Turkey Ham</b>												
Processor Brand	530	3.58	480	3.61	110	3.77	2.98 - 4.49	300	4.26	2.29 - 2.98	60	2.73
Private Brand	40	3.98			40	3.98	3.98	40	3.98			
<b>Turkey Pastrami</b>												
Processor Brand	520	3.84	280	4.46	420	4.03	2.99 - 4.99	390	3.82			
Private Brand			120	5.29	40	5.34						
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	3,620	7.66	3,560	7.31	2,050	6.75	5.48 - 9.99	2,290	7.99	6.99 - 9.79	300	8.45
Private Brand	2,570	6.86	3,640	7.15	1,170	7.38	6.99 - 7.49	1,340	7.03			
<b>Category 2</b>												
Processor Brand	410	5.69	350	4.99	40	5.11	4.99 - 5.99	240	5.87	5.99	40	5.99
Private Brand	1,680	5.17			450	5.54	4.99	120	4.99	4.99	1,190	4.99
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	8,500	2.99	10,540	3.00	8,030	3.19	2.50 - 3.99	1,300	3.21	2.50 - 3.79	2,150	2.98
Private Brand	2,130	3.03	2,190	3.13	2,920	3.06	2.99 - 3.69	410	3.19	3.69	20	3.69
<b>Turkey 16 oz</b>												
Processor Brand	1,070	5.17	350	5.12	90	5.36	4.99	210	4.99			
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	7,990	3.00	9,940	3.03	7,100	3.20	2.50 - 3.99	1,100	3.27	2.77 - 3.79	2,070	3.00
Private Brand	2,130	3.03	2,090	3.12	2,680	3.01	2.99 - 3.69	410	3.19	3.69	20	3.69

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 <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)		
	68.6% of 4,000 sampled outlets			64.9% of 4,000 sampled outlets			62.1% of 2,900 sampled outlets			80.6% of 1,200 sampled outlets		
	Activity Index = 9,480			Activity Index = 8,260			Activity Index = 6,080			Activity Index = 2,670		
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 - 8.99	550	7.22	5.99 - 9.99	490	8.00	7.99 - 8.99	700	8.36	7.49 - 12.99	70	9.41
Private Brand	6.99 - 9.99	30	7.89	6.99 - 7.99	100	7.47						
<b>Category 2</b>												
Processor Brand	4.98 - 6.99	870	5.90	4.99 - 6.99	830	5.96	6.99	170	6.99	5.99	210	5.99
Private Brand	4.99 - 6.99	1,530	5.97	5.99 - 7.49	990	6.93	6.99 - 7.99	590	7.47	4.99 - 6.99	230	6.90
<b>Category 3</b>												
Processor Brand	2.99 - 4.58	210	3.67	3.49 - 5.00	130	4.34				2.97	20	2.97
Private Brand	3.99 - 5.99	200	5.29	3.98 - 5.99	510	5.29	5.99	550	5.99	5.99	320	5.99
<b>Turkey Ham</b>												
Processor Brand	2.99 - 3.49	20	3.24	2.19 - 2.99	40	2.66	2.29 - 2.99	110	2.56			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.49 - 3.98	20	3.82	3.98 - 4.98	40	4.24	2.99	20	2.99	3.98 - 3.99	50	3.98
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.98 - 7.99	410	6.75	6.98 - 8.99	210	7.54	5.99 - 8.99	410	6.21			
Private Brand	5.99 - 6.99	250	6.52	5.99 - 7.99	730	6.63	6.99	250	6.99			
<b>Category 2</b>												
Processor Brand	3.99 - 6.99	100	5.28	4.99 - 5.99	30	5.19						
Private Brand	4.99 - 5.99	240	5.14							6.99	130	6.99
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 3.79	1,710	2.92	1.99 - 2.50	1,390	2.81	2.50 - 3.00	1,250	2.95	2.50 - 3.99	700	3.15
Private Brand	2.50 - 3.79	670	3.08	2.79 - 3.00	720	2.90	2.79 - 2.99	290	2.96	2.79	20	2.79
<b>Turkey 16 oz</b>												
Processor Brand	3.98 - 5.99	340	4.98	4.49 - 5.99	80	4.99	4.99	240	4.99	5.99	200	5.99
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.00 - 3.79	1,660	2.92	1.99 - 2.59	1,250	2.79	2.50 - 3.00	1,210	2.97	2.50 - 3.99	700	3.15
Private Brand	2.50 - 3.79	670	3.08	2.79 - 3.00	720	2.90	2.79 - 2.99	290	2.96	2.79	20	2.79

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)