



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/19 thru 10/25.

Fri. Oct 19, 2012

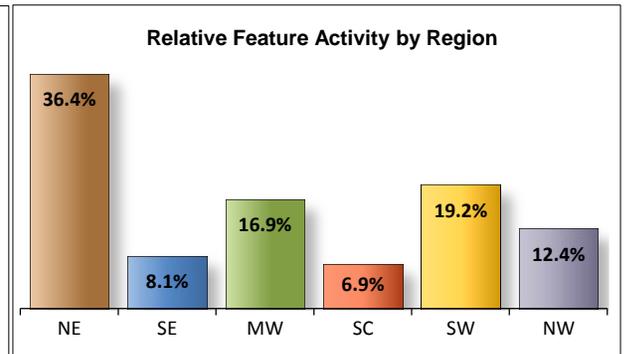
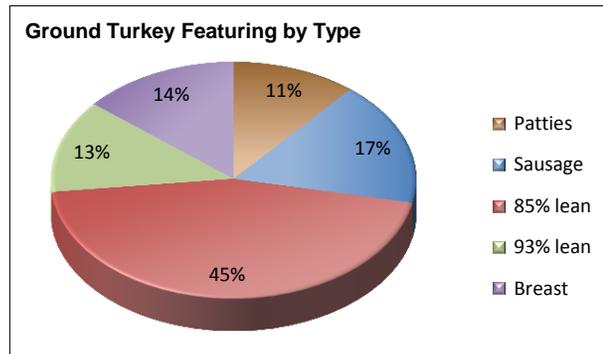
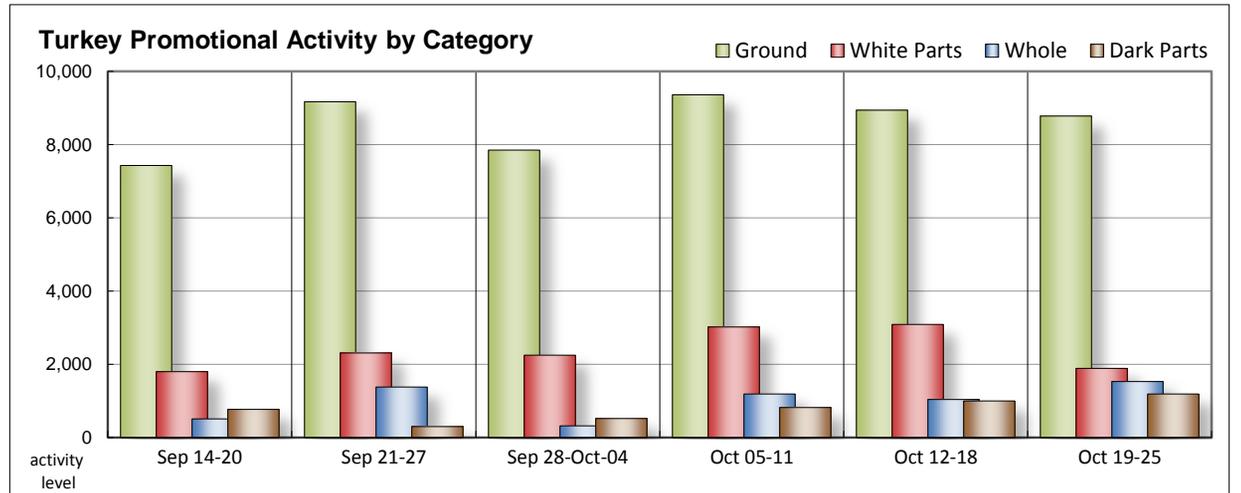
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	36.9% of 22,500 outlets		49.1% of 22,500 outlets		35.7% of 19,500 outlets	
Special Rate ^{4/}	3.3%		6.6%		0.9%	
Activity Index ^{2/}	14,670		17,000		13,370	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	890	0.89	530	1.13	910	0.74
" - Toms	640	0.88	510	1.12	910	0.72
PARTS:						
Breast:						
Bone-in, whole						
Fresh	70	2.49	220	2.29		
Frozen	970	1.79	1,010	1.59	610	1.75
Split, bone-in						
Fresh			40	2.99	170	2.71
Rotisserie	220	7.61	790	8.70	340	7.45
Boneless, whole	30	4.65	10	4.99	190	4.03
Cutlets	420	4.98	600	4.65	1,090	4.60
Cutlets, thin sliced	100	4.94	100	4.99		
Strips						
Tenders	80	4.60	320	4.54	390	4.45
Marinated Tenders	440	4.25	1,090	4.21	1,040	3.98
Drumsticks	430	2.00	360	1.59	330	1.63
Thighs	250	2.00	10	1.99	40	2.19
Wings	370	1.99	240	1.61	350	1.56
Necks	10	1.49	190	1.69	90	1.46
Smoked Drumsticks	50	2.09	90	1.94	50	2.89
Smoked Wings	40	2.19	50	1.79	40	1.92
Smoked Necks	40	1.79	60	1.61	10	1.59
GROUND TURKEY:	8,780	3.13	8,940	3.28	5,380	3.61
Patties	980	3.21	460	3.34	230	3.36
Sausage	1,500	3.49	2,250	3.48	900	3.42
85% lean	3,950	2.54	2,390	2.40	610	2.38
93% lean	1,120	3.09	2,520	3.28	1,860	3.06
Breast	1,230	4.48	1,320	4.54	1,780	4.74
Rolls (frsh/frz 1 lb.)	150	2.21	1,560	1.44	50	1.40
Specialty ^{5/}						
Patties	160	3.98			50	3.99
93-94% lean	510	4.12	210	4.17	1,100	3.90
Breast	20	5.49	70	5.64	230	7.45

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

This Week's Turkey Feature Highlights

Retail feature activity slows going into the middle of the month. Offerings increase on frozen hens and toms; prices are sharply lower. This could be the week to think about buying a turkey to set aside for Thanksgiving. Fewer stores are promoting bone-in breasts and prices are higher. Not much interest in featuring rotisserie breasts this week, but prices are lower. White boneless parts feature activity slows; prices are mixed. Offerings are more active on fresh dark parts, but they will cost the consumer more this week. Feature activity slows on ground turkey. The 85% lean is heavily promoted and accounts for almost half the ads on ground turkey. The 85% lean is also the lowest priced ground item for cost conscious shoppers. Specialty ground turkey is more actively promoted this week. Deli activity slows as fewer stores place deli items in the circulars. Offerings increase on service deli thick slicing meats; promotional activity on thin slicing meats declines. Fewer stores feature self-service deli items.



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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	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/}	62.6% of 4,400 sampled outlets			16.7% of 6,000 sampled outlets			45.6% of 4,000 sampled outlets		
Special Rate ^{4/}	5.9% of stores w/ no-price promotions			3.2% of stores w/ no-price promotions			3.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,270			Activity Index = 1,910			Activity Index = 2,650		
	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	0.99	10	0.99	0.99	400	0.99	0.79	280	0.79
" - Toms	0.99	10	0.99	0.99	190	0.99	0.79	280	0.79
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.29 - 2.89	320	2.35	0.99 - 1.69	350	1.32	1.49 - 1.88	280	1.74
Split, bone-in									
Fresh									
Rotisserie	6.89 - 7.99	150	7.43	7.99	70	7.99			
Boneless, whole	5.98	10	5.98						
Cutlets	4.29 - 5.99	340	5.05				4.69	20	4.69
Cutlets, thin sliced	4.79 - 5.98	100	4.94						
Strips									
Tenders							4.69	20	4.69
Marinated Tenders	4.26 - 4.79	250	4.44	4.26	40	4.26	3.99	130	3.99
Drumsticks	1.99 - 2.29	180	2.01				1.49 - 1.99	60	1.92
Thighs	1.99	60	1.99						
Wings	1.99 - 2.29	120	2.02				1.49 - 1.99	60	1.92
Necks							1.49	10	1.49
Smoked Drumsticks				1.69 - 2.19	50	2.09			
Smoked Wings				2.19	40	2.19			
Smoked Necks				1.79	40	1.79			
GROUND TURKEY:									
Patties	2.99 - 3.49	720	3.24	3.00	20	3.00	3.00	10	3.00
Sausage	2.39 - 3.99	820	3.56	3.39 - 3.99	170	3.78	2.87 - 3.99	390	3.28
85% lean	1.99 - 3.00	1,430	2.62	1.99 - 2.83	350	2.26	2.33 - 2.74	420	2.55
93% lean	2.68 - 3.99	510	3.02	2.99	70	2.99	2.80 - 3.19	400	3.13
Breast (99-100% lean)	4.61 - 5.61	580	4.67	4.61 - 4.79	120	4.73	3.98 - 4.99	110	4.18
Rolls (frsh/frz 1 lb.)							1.67 - 2.99	150	2.21
Specialty ^{5/}									
Patties	3.59 - 6.99	160	3.98						
93-94% lean	3.59 - 4.99	480	4.13				3.59 - 4.29	30	4.05
Breast	5.49	20	5.49						



(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/}	22.2% of 4,000 sampled outlets			46.8% of 2,900 sampled outlets			39.3% of 1,200 sampled outlets		
Special Rate ^{4/}	3.6% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,080			Activity Index = 2,180			Activity Index = 580		
	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	0.47 - 1.19	200	0.81						
" - Toms	0.79 - 1.19	160	0.89						
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.49	70	2.49
Frozen	1.49 - 1.79	20	1.66						
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole	3.99	20	3.99						
Cutlets	3.79 - 4.69	30	4.06	5.17	20	5.17	5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders	3.79 - 4.69	30	4.06				4.99 - 5.45	30	5.07
Marinated Tenders							3.65	20	3.65
Drumsticks				1.99 - 2.59	190	2.01			
Thighs				1.99 - 2.59	190	2.01			
Wings				1.99	190	1.99			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.50	20	3.50	2.99 - 3.79	210	3.09			
Sausage				3.27	120	3.27			
85% lean	2.33 - 2.59	480	2.57	2.33 - 2.59	910	2.50	2.33 - 2.59	360	2.57
93% lean	2.91 - 3.33	80	3.30	3.19	50	3.19	3.59	10	3.59
Breast (99-100% lean)	3.83 - 3.99	40	3.93	3.99 - 5.43	300	4.15	3.99 - 4.79	80	4.69
Rolls (frsh/frz 1 lb.)									
Specialty ^{5/}									
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 10/19 thru 10/25.

(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		85.8% of 4,400 sampled outlets Activity Index = 17,960			71.7% of 6,000 sampled outlets Activity Index = 9,680		
Feature Rate ^{1/}	67.5% of 22,500 stores		77.9% of 22,500 stores		66.2% of 19,500 stores							
Activity Index ^{2/}	44,810		60,660		33,310							
	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	5,260	7.99	5,950	7.92	3,740	7.88	5.98 - 9.99	2,690	8.36	5.99 - 8.99	670	7.78
Private Brand	3,360	7.47	2,520	7.50	1,870	7.54	6.99 - 7.99	2,470	7.56			
Category 2												
Processor Brand	4,900	5.79	4,940	6.05	4,120	6.11	4.98 - 6.99	620	5.56	4.59 - 6.99	2,430	6.00
Private Brand	680	6.31	3,440	6.53	2,950	6.34	4.88 - 6.49	250	6.19			
Category 3												
Processor Brand	1,440	3.85	1,360	4.07	1,660	3.70	2.99 - 4.99	510	4.08	3.99	110	3.99
Private Brand	1,510	5.54	1,360	4.93	1,430	5.38	3.99 - 5.99	240	4.77	5.99	40	5.99
Turkey Ham												
Processor Brand	470	3.36	220	4.48	410	2.88	3.49 - 4.99	200	3.89	2.98	40	2.98
Private Brand			40	3.98								
Turkey Pastrami												
Processor Brand	210	4.23	320	3.96	260	4.90	4.49 - 4.99	60	4.77			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,440	7.90	4,550	7.44	3,230	7.76	5.88 - 8.99	2,500	7.87	6.49 - 8.99	580	8.53
Private Brand	1,540	6.95	800	6.86	1,100	7.02	5.99 - 7.99	1,240	7.04			
Category 2												
Processor Brand	230	4.94	810	6.55	20	5.80	4.99	150	4.99			
Private Brand	40	5.99	3,070	6.35	520	7.22						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,800	3.12	10,310	3.03	6,170	3.12	2.49 - 4.00	2,600	3.26	1.99 - 3.79	1,700	3.04
Private Brand	2,680	3.11	6,630	3.20	430	3.20	2.50 - 3.99	970	2.89	2.50 - 3.33	1,100	3.28
Turkey 16 oz												
Processor Brand	2,110	4.99	1,160	4.64	450	4.66	3.99 - 5.49	640	4.70	4.88 - 5.99	240	5.02
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,610	3.11	9,550	3.04	4,530	3.17	2.49 - 4.00	1,900	3.19	2.25 - 3.79	1,670	3.05
Private Brand	2,530	3.16	3,630	3.18	420	3.21	2.50 - 3.99	920	2.91	2.50 - 3.33	1,100	3.28

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)		
	56.4% of 4,000 sampled outlets			61.3% of 4,000 sampled outlets			55.1% of 2,900 sampled outlets			67.5% of 1,200 sampled outlets		
	Activity Index = 7,570			Activity Index = 4,700			Activity Index = 2,910			Activity Index = 1,990		
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	5.95 - 10.49	800	7.03	5.99 - 8.99	600	7.70	7.99 - 10.99	290	8.13	7.99 - 12.99	210	8.21
Private Brand	6.99	360	6.99	6.99 - 7.99	290	7.32	7.49	240	7.49			
Category 2												
Processor Brand	4.58 - 6.99	940	5.52	4.59 - 5.98	650	5.81	4.99	170	4.99	4.99 - 6.99	90	6.05
Private Brand	4.98 - 6.99	390	6.43	5.98	30	5.98				5.98	10	5.98
Category 3												
Processor Brand	2.99 - 4.99	350	3.70	2.99 - 4.39	400	3.72	2.99	50	2.99	4.99	20	4.99
Private Brand					360	5.35	5.99	550	5.99	5.49 - 5.99	320	5.51
Turkey Ham												
Processor Brand	3.49	20	3.49	1.99 - 2.79	120	2.72	2.99 - 3.69	90	3.20			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49 - 8.49	30	4.79	3.99	100	3.99				2.98	20	2.98
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.95 - 8.99	320	7.00	5.99	10	5.99	7.99	10	7.99	6.99 - 10.99	20	8.49
Private Brand	5.98 - 7.99	250	6.51	5.98 - 7.99	50	6.87						
Category 2												
Processor Brand	3.99 - 4.99	80	4.85									
Private Brand	5.99	40	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.39 - 3.99	1,610	3.10	1.99 - 2.47	690	2.75	2.50 - 3.99	850	3.08	2.47 - 3.99	350	3.35
Private Brand	2.50 - 3.50	410	2.74							3.99	200	3.99
Turkey 16 oz												
Processor Brand	4.88 - 5.99	70	5.22	3.69 - 4.99	960	4.96				5.99	200	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.39 - 3.99	1,590	3.10	1.99 - 2.47	440	2.62	2.50 - 3.99	660	3.24	2.47 - 3.99	350	3.35
Private Brand	2.50 - 3.50	310	2.93							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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