



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/26 thru 11/01.

Fri. Oct 26, 2012

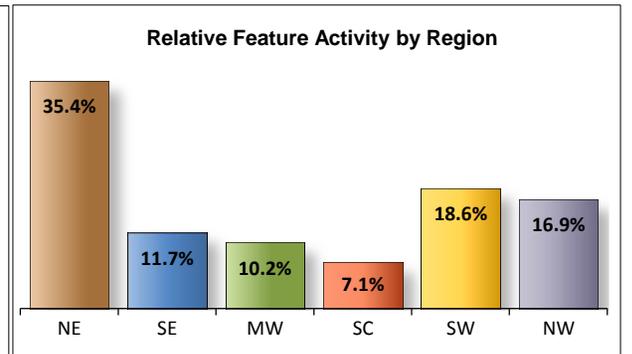
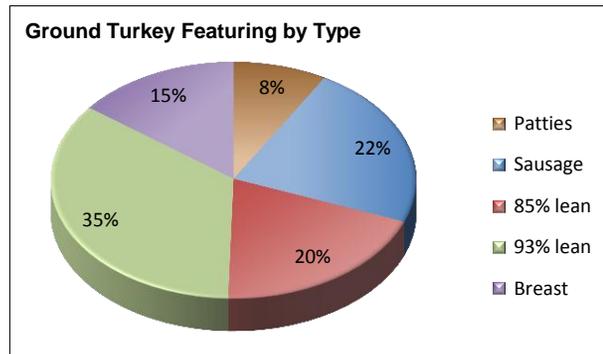
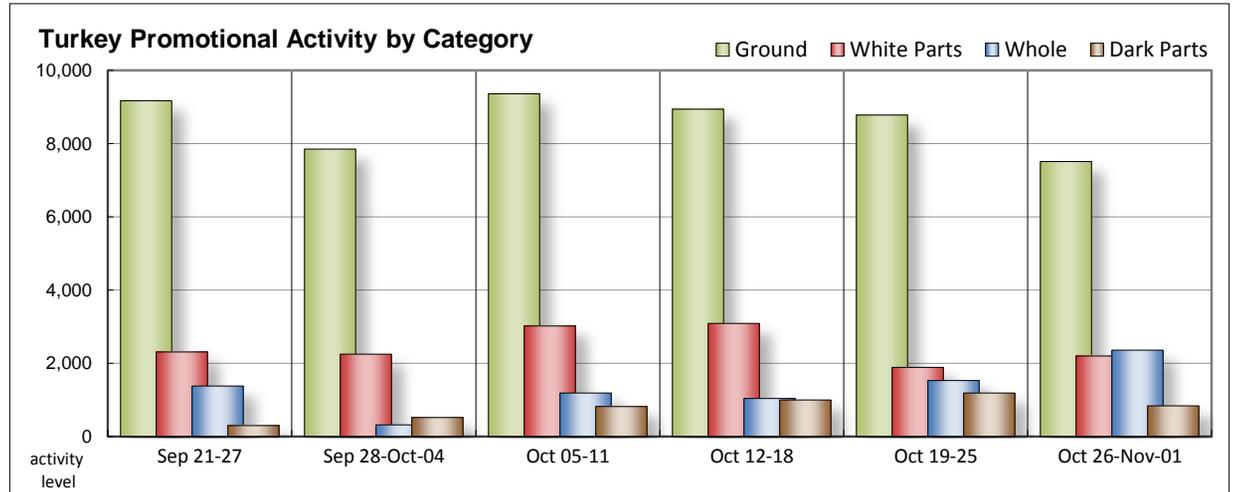
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	33.1% of 22,500 outlets		36.9% of 22,500 outlets		34.7% of 19,500 outlets	
Special Rate ^{4/}	1.8%		3.3%		1.3%	
Activity Index ^{2/}	13,490		14,670		13,280	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	1,180	1.07	890	0.89	910	1.05
" - Toms	1,180	1.07	640	0.88	1,120	1.01
PARTS:						
Breast:						
Bone-in, whole						
Fresh	40	2.39	70	2.49	10	2.99
Frozen	570	2.02	970	1.79	500	1.79
Split, bone-in						
Fresh	170	1.99				
Rotisserie	400	8.33	220	7.61	1,660	8.10
Boneless, whole						
Cutlets	230	5.16	420	4.98	410	4.99
Cutlets, thin sliced	100	4.99	100	4.94	140	5.99
Strips						
Tenders	690	4.55	80	4.60	40	4.86
Marinated Tenders	260	4.28	440	4.25	250	3.99
Drumsticks	110	1.75	430	2.00	750	1.89
Thighs	140	1.80	250	2.00		
Wings	70	1.82	370	1.99	750	1.89
Necks	60	1.69	10	1.49	30	1.39
Smoked Drumsticks	160	1.95	50	2.09	40	1.92
Smoked Wings	150	1.90	40	2.19	40	1.92
Smoked Necks	150	1.80	40	1.79	10	1.69
GROUND TURKEY:	7,510	3.31	8,780	3.13	6,160	3.19
Patties	630	3.23	980	3.21	540	3.35
Sausage	1,690	3.55	1,500	3.49	840	3.27
85% lean	1,470	2.41	3,950	2.54	310	2.12
93% lean	2,620	3.26	1,120	3.09	3,780	3.00
Breast	1,100	4.57	1,230	4.48	690	4.51
Rolls (frsh/frz 1 lb.)	30	2.00	150	2.21	100	1.73
Specialty ^{5/}						
Patties	20	3.79	160	3.98		
93-94% lean	270	4.41	510	4.12	320	3.69
Breast			20	5.49	40	5.51

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

This Week's Turkey Feature Highlights

Retail featuring is less active; turkey has to compete with Halloween promotions this week. Turkeys will get their chance next week as Thanksgiving promotions start to kick into gear. Offerings on frozen hens and toms increase in volume and price. Fewer stores place bone-in breasts in their circulars; fresh prices are lower, frozen prices are higher. More stores promote rotisserie breasts but they'll cost a lot more compared to last week. Offerings on white boneless parts are most active on tenders; prices are lower on tenders, higher on the balance of items. Feature activity slows on ground turkey; the weighted average price is higher. Retailers decrease promotions on 85% lean and increase offerings of 93% lean. Retail featuring increases on deli items. Service deli promotional activity is sharply higher on thin slicing meats; retailers show less interest in promoting value products. Self-service deli feature activity increases on processor brands; prices are unchanged to sharply lower on self-service deli items. Halloween is fast approaching, spooky!



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.



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/26 thru 11/01.

Fri. Oct 26, 2012

(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/}	58.8% of 4,400 sampled outlets			19.6% of 6,000 sampled outlets			28.3% of 4,000 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			1.8% of stores w/ no-price promotions			3.3% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 5,680			Activity Index = 2,570			Activity Index = 1,490		
	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 - 1.59	180	1.55	0.59 - 1.59	570	1.10	0.78 - 1.29	200	0.80
" - Toms	0.99 - 1.59	180	1.55	0.59 - 1.59	570	1.10	0.78 - 1.29	200	0.80
PARTS:									
Breast:									
Bone-in, whole									
Fresh	3.29	10	3.29	1.29	10	1.29			
Frozen	1.99 - 2.27	180	2.01	1.48 - 2.27	210	2.22	1.48 - 1.99	70	1.74
Split, bone-in									
Fresh	1.99	170	1.99						
Rotisserie	6.89 - 8.99	90	7.43	7.99	110	7.99	7.49	10	7.49
Boneless, whole									
Cutlets	4.99 - 5.99	170	5.34	5.99	20	5.99			
Cutlets, thin sliced	4.99	100	4.99						
Strips									
Tenders	5.99	10	5.99						
Marinated Tenders	4.26 - 4.79	240	4.28				4.33	20	4.33
Drumsticks				1.69	50	1.69	1.69	10	1.69
Thighs							1.79	90	1.79
Wings	2.59	10	2.59	1.69	50	1.69	1.69	10	1.69
Necks				1.69	50	1.69	1.69	10	1.69
Smoked Drumsticks	1.99	140	1.99	1.99	10	1.99	1.38	10	1.38
Smoked Wings	1.89	140	1.89	1.99	10	1.99			
Smoked Necks	1.79	140	1.79	1.99	10	1.99			
GROUND TURKEY:									
Patties	2.99 - 3.99	350	3.29	2.99	10	2.99	3.00 - 3.99	200	3.11
Sausage	2.87 - 3.99	1,130	3.37	3.19	70	3.19	3.59	10	3.59
85% lean	1.99 - 3.07	730	2.51	2.02 - 2.83	380	2.29	1.68 - 2.79	290	2.34
93% lean	2.80 - 3.84	940	3.18	2.50 - 3.50	420	2.97	2.49 - 3.67	270	3.04
Breast (99-100% lean)	4.61 - 5.38	510	5.02	3.91	20	3.91	2.89 - 4.16	40	3.58
Rolls (frsh/frz 1 lb.)							2.00	20	2.00
Specialty ^{5/}									
Patties							3.79	20	3.79
93-94% lean	3.99 - 5.99	260	4.43				3.99	10	3.99
Breast									



(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/}	18.5% of 4,000 sampled outlets			40.8% of 2,900 sampled outlets			52.1% of 1,200 sampled outlets		
Special Rate ^{4/}	1.1% of stores w/ no-price promotions			2.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,040			Activity Index = 1,970			Activity Index = 740		
	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	0.79 - 1.19	230	0.86						
" - Toms	0.79 - 1.19	230	0.86						
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49	20	2.49						
Frozen	1.49	10	1.49	1.79	20	1.79	1.79 - 1.99	80	1.89
Split, bone-in									
Fresh									
Rotisserie				8.99	190	8.99			
Boneless, whole									
Cutlets	3.99	40	3.99						
Cutlets, thin sliced									
Strips									
Tenders	3.99	40	3.99	3.99 - 4.79	440	4.45	4.79	200	4.79
Marinated Tenders									
Drumsticks	2.18	30	2.18	1.29	20	1.29			
Thighs	2.18	30	2.18	1.29	20	1.29			
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 3.29	50	3.12	3.99	20	3.99			
Sausage				3.27 - 4.09	400	4.06	3.43 - 4.09	80	4.00
85% lean	2.08 - 2.49	40	2.21				2.39	30	2.39
93% lean	2.95 - 3.67	230	3.06	2.80 - 4.23	660	3.65	3.19 - 3.99	100	3.78
Breast (99-100% lean)	4.16	80	4.16	3.99 - 5.19	200	4.08	3.99 - 4.79	250	4.37
Rolls (frsh/frz 1 lb.)	2.00	10	2.00						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Oct 26, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/26 thru 11/01.

(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		84.8% of 4,400 sampled outlets Activity Index = 14,550			57.7% of 6,000 sampled outlets Activity Index = 9,210		
Feature Rate ^{1/}	69.6% of 22,500 stores		67.5% of 22,500 stores		81.2% of 19,500 stores							
Activity Index ^{2/}	47,090		44,810		46,680							
	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	4,270	7.70	5,260	7.99	6,820	8.01	5.98 - 9.99	2,120	7.74	6.98 - 8.99	760	7.92
Private Brand	3,060	7.45	3,360	7.47	1,320	7.71	6.99 - 10.99	2,290	7.60	6.99 - 7.49	150	7.34
Category 2												
Processor Brand	6,090	5.96	4,900	5.79	4,850	5.74	4.99 - 6.99	1,050	6.09	4.99 - 6.99	520	5.98
Private Brand	2,170	6.50	680	6.31	6,370	6.76	5.97 - 8.99	1,340	6.69	5.99	20	5.99
Category 3												
Processor Brand	680	3.73	1,440	3.85	660	4.03	3.98 - 4.99	130	4.52	3.99	60	3.99
Private Brand	40	2.98	1,510	5.54	1,490	5.74	2.98	40	2.98			
Turkey Ham												
Processor Brand	470	4.34	470	3.36	310	3.42	3.99 - 5.89	320	4.58	5.89	20	5.89
Private Brand					120	4.99						
Turkey Pastrami												
Processor Brand	500	4.11	210	4.23	300	3.86	2.99 - 5.89	440	3.99	5.89	20	5.89
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4,480	7.12	3,440	7.90	5,330	7.61	5.99 - 8.99	1,580	7.49	5.99 - 8.99	1,730	6.97
Private Brand	1,210	6.40	1,540	6.95	2,030	7.03	5.99 - 6.99	940	6.21			
Category 2												
Processor Brand	460	5.47	230	4.94	10	4.99						
Private Brand	10	3.98	40	5.99								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,890	2.95	7,800	3.12	4,920	3.31	2.50 - 3.99	1,820	3.20	2.49 - 3.50	2,190	2.98
Private Brand	2,510	2.93	2,680	3.11	3,630	2.96	2.48 - 2.99	320	2.72	2.50 - 3.33	670	3.08
Turkey 16 oz												
Processor Brand	1,220	4.99	2,110	4.99	1,170	4.99	3.99 - 5.99	230	4.60	4.99 - 5.99	260	5.40
Private Brand												
Chicken 7-10 oz												
Processor Brand	8,520	2.52	6,610	3.11	4,060	3.27	2.50 - 3.99	1,610	3.15	2.49 - 3.50	2,140	1.34
Private Brand	2,510	2.93	2,530	3.16	3,290	2.96	2.48 - 2.99	320	2.72	2.50 - 3.33	670	3.08

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)



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Oct 26, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/26 thru 11/01.

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

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)		
	66.5% of 4,000 sampled outlets			78.4% of 4,000 sampled outlets			66.5% of 2,900 sampled outlets			62.3% of 1,200 sampled outlets		
	Activity Index = 9,840			Activity Index = 6,430			Activity Index = 4,830			Activity Index = 2,230		
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 - 9.99	960	7.22	6.98 - 10.49	230	8.05	7.99 - 10.99	140	8.27	6.99 - 8.99	60	8.15
Private Brand	7.99	20	7.99	6.49 - 7.99	600	6.86						
Category 2												
Processor Brand	4.29 - 6.99	2,220	5.68	4.29 - 6.99	810	5.98	4.99 - 6.99	960	6.31	4.99 - 6.99	530	6.22
Private Brand	4.99 - 6.99	700	6.24	5.99	110	5.99						
Category 3												
Processor Brand	2.99 - 3.98	290	3.44	2.99 - 3.99	170	3.49	2.99	10	2.99	3.98 - 4.99	20	4.45
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 5.49	40	4.26				1.99 - 3.99	90	3.19			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 5.99	40	4.46									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.99	860	6.80	5.99 - 8.79	300	6.89	6.99	10	6.99			
Private Brand	6.99	250	6.99	7.99	20	7.99						
Category 2												
Processor Brand	4.58 - 5.99	420	5.52	4.99	40	4.99						
Private Brand	3.98	10	3.98									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.49 - 3.99	1,520	2.95	2.00 - 2.49	1,400	2.69	2.49 - 4.49	1,270	2.83	2.49 - 4.49	690	2.96
Private Brand	2.50 - 3.00	400	2.76	2.50 - 2.99	680	2.93	2.99	420	2.99	2.99	20	2.99
Turkey 16 oz												
Processor Brand	4.98 - 4.99	190	4.99	4.47 - 4.99	100	4.83	4.99	240	4.99	4.99	200	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.49 - 3.99	1,520	2.95	2.00 - 2.49	1,290	2.63	2.49 - 4.49	1,270	2.83	2.49 - 4.49	690	2.96
Private Brand	2.50 - 3.00	400	2.76	2.50 - 2.99	680	2.93	2.99	420	2.99	2.99	20	2.99

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)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)