



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/18 thru 01/24.

Fri. Jan 18, 2013

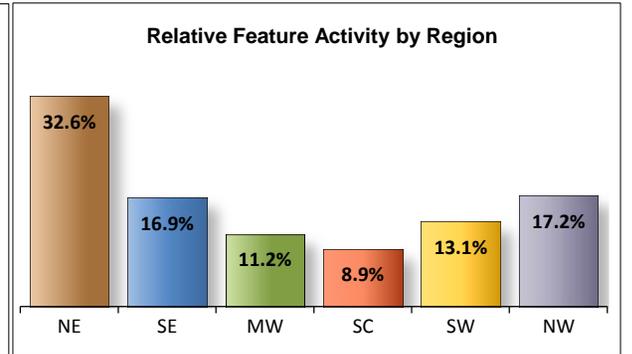
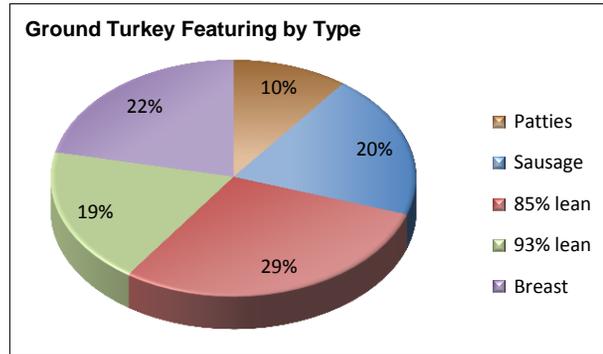
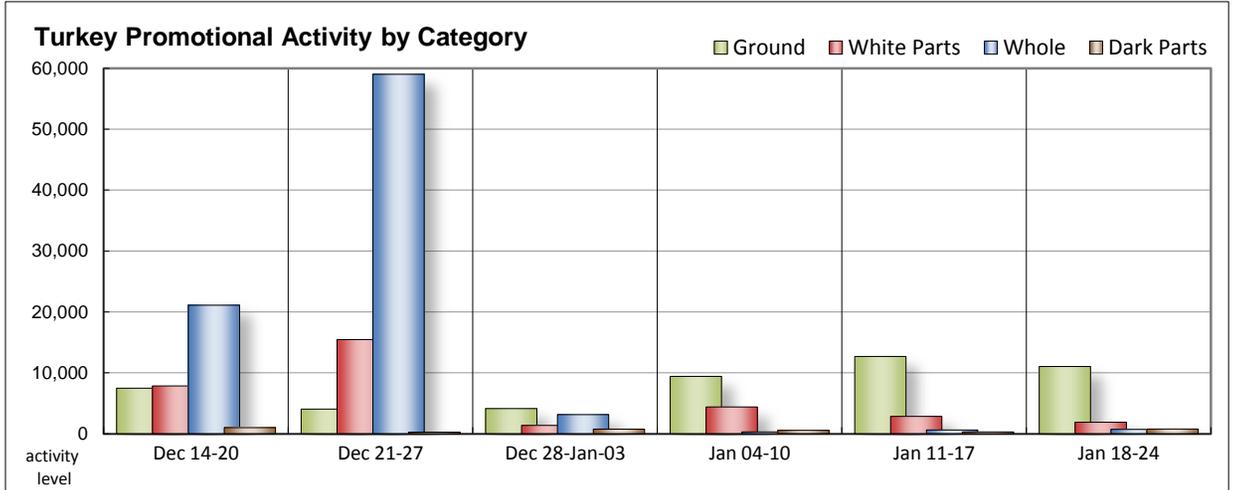
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	42.3% of 23,200 outlets		49.6% of 23,200 outlets		32.4% of 22,500 outlets	
Special Rate ^{4/}	0.3%		0.9%		0.2%	
Activity Index ^{2/}	17,130		18,330		11,620	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	360	1.23	310	1.02	140	1.26
" - Toms	360	1.23	310	1.03	140	1.26
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	3.20	180	3.03	20	2.64
Frozen	330	1.82	360	1.94	640	1.80
Split, bone-in						
Fresh	190	2.99	170	2.99		
Rotisserie	510	7.96	1,060	8.57	1,770	7.47
Boneless, whole	30	4.69			20	4.99
Cutlets	460	4.88	400	4.51	750	4.81
Cutlets, thin sliced			130	4.99		
Strips						
Tenders	350	4.06	550	4.44	430	4.24
Marinated Tenders	1,560	4.20	220	3.89	440	4.06
Drumsticks	40	2.13	60	1.72	160	1.57
Thighs	90	2.50	40	2.25	30	2.29
Wings	20	2.24	120	2.35	140	1.48
Necks			20	1.44	10	1.69
Smoked Drumsticks	220	2.18	20	2.24	220	2.22
Smoked Wings	260	2.05	30	2.06	320	2.25
Smoked Necks	150	1.81	10	1.99	300	2.02
GROUND TURKEY:	11,040	3.32	12,690	3.21	5,970	3.49
Patties	1,140	3.52	890	3.77	740	4.01
Sausage	2,190	3.36	1,920	3.42	1,600	2.81
85% lean	3,260	2.58	2,850	2.73	420	2.31
93% lean	2,060	3.09	5,810	3.05	1,330	3.22
Breast	2,390	4.82	1,220	4.27	1,880	4.48
Rolls (frsh/frz 1 lb.)	520	2.48	320	1.78	20	1.53
Specialty ^{5/}						
Patties	260	4.99	230	3.99	10	4.99
93-94% lean	320	4.17	460	3.99	90	4.22
Breast	40	5.63	640	5.50		

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

This Week's Turkey Feature Highlights

Retail feature activity is less active this week. Offerings increase on frozen hens and toms; prices are higher. Fewer stores are promoting fresh and frozen bone-in breasts; prices are higher on fresh, lower on frozen. Feature activity slows on rotisserie breasts, although there are still plenty of stores promoting rotisserie breasts and prices are lower. Consumers will find more boneless white parts offered, especially marinated tenders which are heavily promoted this week. For shoppers in the mood for some dark parts, offerings increase on smoked drums, wings and necks; prices are lower. Featuring on ground turkey slows, but there are still plenty of ads on all of the ground items. Promotional activity increases on all the grinds except the 93%. This week the 85% lean is the most actively promoted and lowest priced grind. More stores feature deli items this week. Service deli offerings are most active on thin slicing meats, especially the private brands. Self service deli featuring is more active; stores are focusing on processor brands, with only a few stores offering their private brands.



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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Fri. Jan 18, 2013

(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/}	61.9% of 4,600 sampled outlets			38.6% of 6,100 sampled outlets			27.3% of 4,200 sampled outlets		
Special Rate ^{4/}	1.7% 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 = 6,400			Activity Index = 4,520			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	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99 - 1.79	160	1.44	0.99	130	0.99	0.99	10	0.99
" - Toms	0.99 - 1.79	160	1.44	0.99	130	0.99	0.99	10	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.69 - 3.49	20	3.20						
Frozen	1.79 - 2.29	180	2.27				0.97 - 1.99	50	1.36
Split, bone-in									
Fresh	2.99	190	2.99						
Rotisserie	6.89 - 8.99	370	8.06	7.49	40	7.49			
Boneless, whole									
Cutlets	3.99 - 5.99	410	4.99				3.99 - 4.99	30	4.69
Cutlets, thin sliced							3.98	10	3.98
Strips									
Tenders	3.99 - 4.49	20	4.13	3.99	200	3.99	3.98 - 4.49	60	4.44
Marinated Tenders	4.26	140	4.26	3.73 - 4.26	1,350	4.18	4.26 - 4.66	60	4.60
Drumsticks	2.99	10	2.99				1.49 - 1.99	30	1.85
Thighs	2.49 - 2.99	60	2.77				1.89 - 1.99	30	1.96
Wings	2.99	10	2.99				1.49	10	1.49
Necks									
Smoked Drumsticks	1.99 - 2.49	160	2.02	2.25	10	2.25	1.99 - 2.69	20	2.30
Smoked Wings	1.79 - 2.49	160	1.85	1.99 - 2.25	50	2.06	1.99 - 2.69	20	2.30
Smoked Necks	1.79 - 1.99	150	1.81						
GROUND TURKEY:									
Patties	2.99 - 4.49	630	3.65	3.29 - 3.99	40	3.62	3.49 - 3.50	200	3.49
Sausage	2.92 - 4.49	960	3.41	2.92 - 3.99	590	3.71	2.79 - 3.50	360	3.12
85% lean	2.33 - 3.99	840	2.82	1.99 - 3.07	1,830	2.47	2.39 - 3.00	110	2.61
93% lean	2.68 - 3.84	900	2.94	2.78 - 3.50	150	3.08	2.49 - 3.75	700	3.36
Breast (99-100% lean)	3.84 - 5.38	300	4.88				4.79	260	4.79
Rolls (frsh/frz 1 lb.)							2.38	10	2.38
Specialty ^{5/}									
Patties	4.99	250	4.99						
93-94% lean	2.99 - 4.49	290	4.24				3.33	20	3.33
Breast	5.49 - 5.99	30	5.68						



(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/}	32.4% of 4,100 sampled outlets			44.2% of 2,900 sampled outlets			67.0% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% 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 = 1,590			Activity Index = 1,700			Activity Index = 920		
	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	1.19	60	1.19						
" - Toms	1.19	60	1.19						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.97 - 1.67	100	1.25						
Split, bone-in									
Fresh									
Rotisserie	7.49	50	7.49				7.99	50	7.99
Boneless, whole									
Cutlets	3.99	40	3.99						
Cutlets, thin sliced									
Strips									
Tenders	3.78 - 3.99	70	3.91						
Marinated Tenders							4.39	10	4.39
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks	2.99	30	2.99						
Smoked Wings	2.99	30	2.99						
Smoked Necks									
GROUND TURKEY:									
Patties	3.00 - 3.49	50	3.40	3.00 - 3.99	190	3.07	3.99	30	3.99
Sausage	2.50 - 2.91	50	2.83	2.50 - 3.27	200	2.59	3.27	30	3.27
85% lean	2.39 - 2.79	100	2.64	2.40 - 2.80	380	2.55			
93% lean	2.39 - 3.19	150	2.57	3.19	50	3.19	3.19 - 3.59	110	3.21
Breast (99-100% lean)	4.79 - 5.19	350	4.80	4.79 - 5.51	830	4.88	3.99 - 5.19	650	4.75
Rolls (frsh/frz 1 lb.)	1.99 - 2.50	450	2.47	2.50	40	2.50	2.50	20	2.50
Specialty ^{5/}									
Patties				4.99	10	4.99			
93-94% lean							3.99	10	3.99
Breast							5.49	10	5.49



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 18, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/18 thru 01/24.

(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		85.4% of 4,600 sampled outlets Activity Index = 14,010			80.2% of 6,100 sampled outlets Activity Index = 13,010		
Feature Rate ^{1/}	74.7% of 23,200 stores		63.5% of 23,200 stores		71.0% of 22,500 stores		Price Range (\$/pound)			Price Range (\$/pound)		
Activity Index ^{2/}	50,680		43,950		44,840		Summary Stores Wtd Avg			Summary Stores Wtd Avg		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5,680	8.22	5,690	7.76	4,620	7.71	5.99 - 10.99	2,640	8.41	6.49 - 8.99	1,230	7.90
Private Brand	1,740	7.88	3,290	7.64	1,730	7.57	6.98 - 8.99	1,200	7.87	6.99 - 7.49	180	7.29
Category 2												
Processor Brand	4,190	5.39	4,020	6.10	4,890	6.18	3.99 - 6.99	1,810	5.30	4.99 - 5.99	430	5.75
Private Brand	3,650	7.00	1,420	6.59	4,950	7.18	5.99 - 6.99	1,340	6.80	5.99 - 6.99	50	6.87
Category 3												
Processor Brand	920	4.10	940	3.86	890	3.98	2.99 - 3.99	320	3.96	3.99 - 5.99	80	5.14
Private Brand	1,560	4.80	80	3.87	290	4.07	3.99 - 4.99	210	4.49	4.99	40	4.99
Turkey Ham												
Processor Brand	480	3.82	190	3.00	300	3.33	3.88 - 4.99	290	4.52	2.29	10	2.29
Private Brand												
Turkey Pastrami												
Processor Brand	460	3.84	370	4.02	270	4.46	3.49 - 4.99	310	3.96			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,890	7.78	3,640	7.65	2,530	7.24	5.99 - 8.99	1,180	8.14	5.99 - 8.99	190	7.93
Private Brand	1,220	7.66	380	7.41	1,590	7.38	6.99 - 7.99	930	7.79			
Category 2												
Processor Brand	50	4.91	90	4.96	170	5.97	4.99	40	4.99			
Private Brand	290	5.84	290	5.97								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	12,850	3.09	7,380	3.04	9,040	3.07	1.99 - 3.99	1,350	3.26	2.49 - 3.99	5,320	3.29
Private Brand	850	2.96	6,460	3.18	1,920	2.96	2.48 - 3.33	250	3.19	2.99	10	2.99
Turkey 16 oz												
Processor Brand	1,200	5.49	510	5.17	1,100	4.98	4.49 - 6.49	550	5.26	4.99 - 5.99	150	5.29
Private Brand	80	5.49			30	3.99						
Chicken 7-10 oz												
Processor Brand	12,730	3.10	6,040	3.02	8,720	3.07	1.99 - 3.99	1,340	3.26	2.49 - 3.99	5,310	3.29
Private Brand	840	2.96	3,160	3.04	1,800	2.95	2.48 - 3.33	250	3.19	2.99	10	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)



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(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)		
	71.7% of 4,200 sampled outlets			65.9% of 4,100 sampled outlets			66.2% of 2,900 sampled outlets			66.8% of 1,200 sampled outlets		
	Activity Index = 8,880			Activity Index = 7,730			Activity Index = 4,680			Activity Index = 2,370		
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	580	7.46	6.49 - 8.49	630	8.40	6.99 - 8.99	510	8.34	8.49 - 12.99	90	10.15
Private Brand	7.49 - 9.99	260	8.68	5.99 - 7.99	100	6.98						
Category 2												
Processor Brand	4.49 - 6.99	1,530	5.35	4.98 - 5.99	330	5.48	4.99	30	4.99	5.99 - 6.48	60	6.06
Private Brand	4.99 - 6.99	530	6.13	5.98 - 7.99	660	7.13	6.99 - 8.99	550	8.02	6.99 - 7.49	520	7.18
Category 3												
Processor Brand	2.69 - 4.58	160	3.60	3.49 - 4.99	260	4.13	3.99	40	3.99	3.98 - 5.99	60	4.72
Private Brand	3.99 - 4.99	80	4.09	3.99 - 4.99	350	4.65	4.99	550	4.99	4.99	330	4.99
Turkey Ham												
Processor Brand	2.48 - 3.98	50	3.04				2.49 - 3.39	130	2.69			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 3.98	80	3.74	3.98	30	3.98	2.99	40	2.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4.95 - 7.98	250	6.44	5.99 - 9.49	260	7.33	6.99	10	6.99			
Private Brand	6.98 - 7.99	110	7.58	5.98 - 7.99	180	7.04						
Category 2												
Processor Brand	4.58	10	4.58									
Private Brand	4.99 - 5.99	250	5.86	4.98 - 5.98	40	5.71						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.99	2,190	2.86	1.99 - 2.67	2,280	2.81	2.49 - 3.99	1,150	3.02	2.49 - 3.99	560	3.08
Private Brand	2.50 - 3.39	270	2.71	2.99	190	2.99	2.98	130	2.98			
Turkey 16 oz												
Processor Brand	4.99	40	4.99	6.99	10	6.99	4.99	260	4.99	6.99	190	6.99
Private Brand	5.49	80	5.49									
Chicken 7-10 oz												
Processor Brand	1.99 - 3.99	2,150	2.86	1.99 - 2.50	2,220	2.80	2.49 - 3.99	1,150	3.02	2.49 - 3.99	560	3.08
Private Brand	2.50 - 3.39	260	2.69	2.99	190	2.99	2.98	130	2.98			

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)