



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/25 thru 01/31.

Fri. Jan 25, 2013

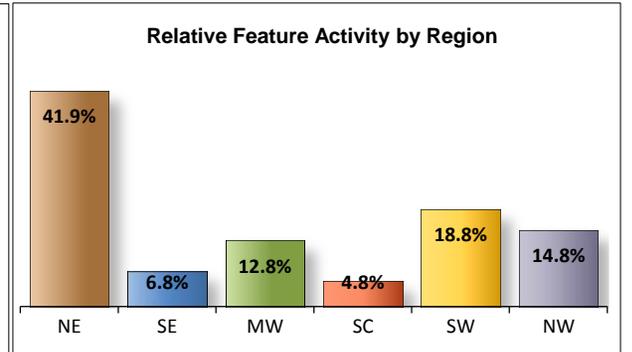
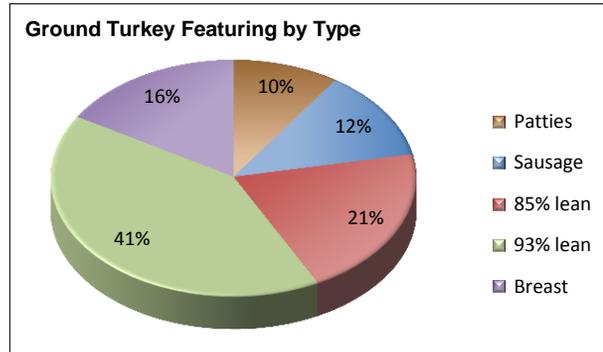
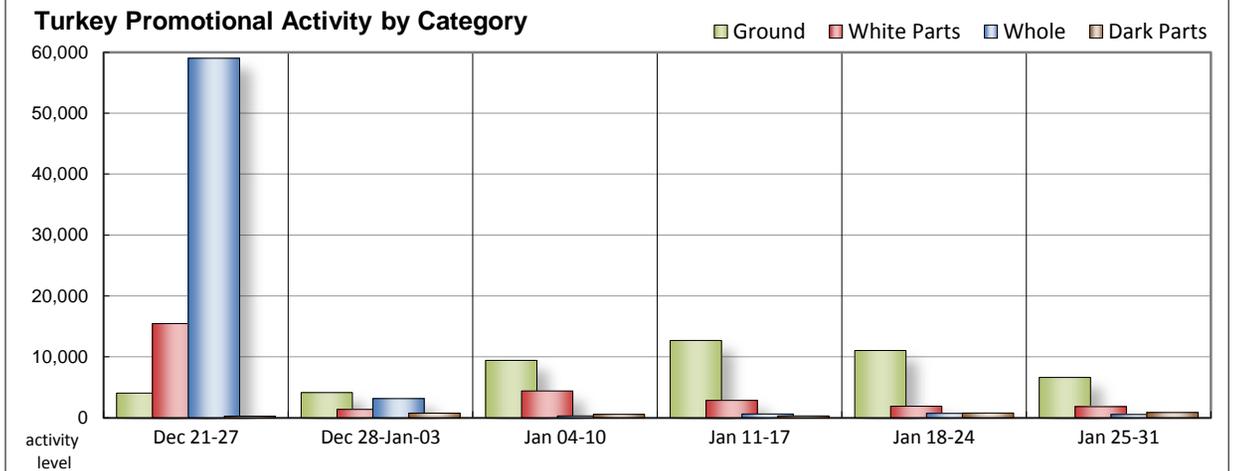
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	32.1% of 23,200 outlets		42.3% of 23,200 outlets		25.6% of 22,500 outlets	
Special Rate ^{4/}	0.3%		0.3%		0.3%	
Activity Index ^{2/}	11,600		17,130		9,920	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	20	1.29			10	1.18
" - Toms	20	1.29			10	1.18
Frozen - Hens	250	1.67	360	1.23	360	1.38
" - Toms	250	1.67	360	1.23	350	1.38
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.46	20	3.20	10	1.99
Frozen	660	1.60	330	1.82	710	1.95
Split, bone-in						
Fresh			190	2.99		
Rotisserie	570	8.35	510	7.96	160	7.98
Boneless, whole	30	4.25	30	4.69	20	4.99
Cutlets	330	4.87	460	4.88	440	4.77
Cutlets, thin sliced	130	4.99			10	5.99
Strips						
Tenders	80	4.16	350	4.06	450	4.89
Marinated Tenders	1,130	4.19	1,560	4.20	610	4.05
Drumsticks	170	1.82	40	2.13	280	1.81
Thighs	10	1.98	90	2.50	230	1.89
Wings	140	1.91	20	2.24	330	1.76
Necks	130	1.90			170	1.87
Smoked Drumsticks	130	2.25	220	2.18	610	2.66
Smoked Wings	140	2.19	260	2.05	610	2.66
Smoked Necks	140	2.21	150	1.81	10	1.69
GROUND TURKEY:	6,620	3.37	11,040	3.32	3,650	3.36
Patties	630	3.71	1,140	3.52	220	3.05
Sausage	820	3.32	2,190	3.36	320	3.19
85% lean	1,360	2.60	3,260	2.58	1,720	2.89
93% lean	2,720	3.15	2,060	3.09	640	3.53
Breast	1,090	4.71	2,390	4.82	750	4.59
Rolls (frsh/frz 1 lb.)	290	2.30	520	2.48	60	1.86
Specialty ^{5/}						
Patties	150	4.84	260	4.99	60	5.34
93-94% lean	150	4.55	320	4.17	760	3.53
Breast	40	5.74	40	5.63	10	5.69

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

This Week's Turkey Feature Highlights

Retail activity slows going into the end of the month. Offerings slow on frozen hens and toms; prices are higher. More stores are putting frozen bone-in breast in this week's circulars; prices are sharply lower. Promotional activity on rotisserie breasts increases; they will cost the consumer more this week. Marinated tenders continue to be the favorite boneless white part; prices are close to unchanged. Offerings increase on dark parts and they are more evenly distributed this week; prices are lower on fresh, higher on smoked. Retailers back away from ground turkey promotions; offerings are less active on all grinds except the 93% lean. Deli promotional activity slows. Service deli is less active on all turkey deli, more active on chicken deli. There is a large increase in feature activity on private label thin slicing chicken. Self-service deli slows on 7 - 10 oz. packages, increases on 16 oz. packages of turkey. Prices are lower on processor brands, mixed on private brands. The Super Bowl is next week; wouldn't a deli platter be a good choice for the party crowd?



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/}	59.6% of 4,600 sampled outlets			14.3% of 6,100 sampled outlets			32.4% of 4,200 sampled outlets		
Special Rate ^{4/}	1.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.5% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 5,810			Activity Index = 1,290			Activity Index = 1,610		
	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							1.29	20	1.29
" - Toms							1.29	20	1.29
Frozen - Hens	1.49 - 1.99	190	1.83						
" - Toms	1.49 - 1.99	190	1.83						
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.39 - 2.49	20	2.46
Frozen	1.29 - 1.59	150	1.46				1.19 - 1.79	420	1.59
Split, bone-in									
Fresh									
Rotisserie	6.99 - 8.99	320	8.26	7.99 - 8.99	150	8.29	7.99 - 8.88	100	8.70
Boneless, whole	3.99 - 4.99	30	4.25						
Cutlets	3.99 - 4.99	320	4.87						
Cutlets, thin sliced	4.99	130	4.99						
Strips									
Tenders	4.39	50	4.39						
Marinated Tenders	3.73 - 4.66	980	4.15	4.26	70	4.26	4.66	80	4.66
Drumsticks	1.49 - 1.99	140	1.87	1.29	10	1.29	1.49 - 1.98	20	1.77
Thighs							1.98	10	1.98
Wings	1.49 - 1.99	120	1.95	1.69	10	1.69	1.49 - 1.79	10	1.65
Necks	1.99	110	1.99	0.99	10	0.99	1.79	10	1.79
Smoked Drumsticks	1.99 - 2.29	130	2.25						
Smoked Wings	1.58 - 2.29	130	2.22	1.69	10	1.69			
Smoked Necks	1.99 - 2.29	130	2.25	1.69	10	1.69			
GROUND TURKEY:									
Patties	3.49 - 3.99	200	3.72	3.00	20	3.00	3.49 - 3.50	200	3.50
Sausage	2.80 - 3.99	570	3.38	2.80 - 3.99	160	3.23	3.19 - 3.27	40	3.22
85% lean	2.33 - 3.33	270	2.90	2.00 - 2.99	300	2.49	2.50 - 2.99	350	2.82
93% lean	3.07 - 3.84	580	3.23	2.83 - 3.33	420	3.07	2.91 - 3.59	150	3.02
Breast (99-100% lean)	3.84 - 5.99	760	4.79	4.16 - 4.99	120	4.88	3.03 - 3.52	50	3.41
Rolls (frsh/frz 1 lb.)							2.49 - 2.99	80	2.69
Specialty ^{5/}									
Patties	4.79 - 5.29	150	4.84						
93-94% lean	4.59	130	4.59				4.29	20	4.29
Breast	5.49	30	5.49				6.49	10	6.49



(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/}	11.2% of 4,100 sampled outlets			49.5% of 2,900 sampled outlets			45.3% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.1% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 610			Activity Index = 1,720			Activity Index = 560		
	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	1.79 - 1.99	80	1.87				1.79	10	1.79
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	4.77 - 4.99	10	4.85						
Cutlets, thin sliced									
Strips									
Tenders	3.78	30	3.78						
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.49 - 3.99	210	3.96			
Sausage	3.19	10	3.19	2.50 - 3.27	30	2.93	3.27	10	3.27
85% lean	2.49 - 3.18	110	2.72	2.00 - 2.80	320	2.13	3.18	10	3.18
93% lean	2.08 - 3.20	120	2.59	2.79 - 3.99	990	3.20	3.19 - 3.59	460	3.20
Breast (99-100% lean)	4.39 - 4.58	50	4.43	4.58	40	4.58	4.79	70	4.79
Rolls (frsh/frz 1 lb.)	1.89 - 2.49	80	2.40	1.99	130	1.99			
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 25, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/25 thru 01/31.

(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		93.4% of 4,600 sampled outlets			66.1% of 6,100 sampled outlets		
Feature Rate ^{1/}	70.7% of 23,200 stores		74.7% of 23,200 stores		77.1% of 22,500 stores		Activity Index = 16,330			Activity Index = 9,280		
Activity Index ^{2/}	45,270		50,680		50,700		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	2,580	8.10	5,680	8.22	3,870	7.63	5.99 - 9.99	830	8.00	6.98 - 9.99	1,050	8.37
Private Brand	2,960	7.82	1,740	7.88	3,430	7.67	6.99 - 9.99	2,710	7.81	7.49 - 7.99	170	7.68
Category 2												
Processor Brand	4,020	5.94	4,190	5.39	3,460	6.15	4.98 - 6.99	1,350	6.05	4.99 - 5.99	470	5.83
Private Brand	2,530	5.73	3,650	7.00	2,390	6.38	4.99 - 6.99	480	6.12	4.99 - 5.99	1,160	5.00
Category 3												
Processor Brand	1,000	3.95	920	4.10	670	3.94	2.99 - 4.99	240	4.02	3.99 - 4.99	190	4.23
Private Brand	240	5.04	1,560	4.80	1,690	4.99	3.88 - 5.48	240	5.04			
Turkey Ham												
Processor Brand	710	3.30	480	3.82	350	3.63	2.49 - 3.99	550	3.39	3.99	30	3.99
Private Brand												
Turkey Pastrami												
Processor Brand	540	4.09	460	3.84	450	3.75	3.99 - 4.99	190	4.21			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,360	7.81	1,890	7.78	2,810	7.56	5.77 - 9.49	1,100	8.15	5.99 - 9.99	240	8.97
Private Brand	1,170	7.52	1,220	7.66	1,210	6.75	5.99 - 7.99	990	7.64	6.99	90	6.99
Category 2												
Processor Brand	90	4.92	50	4.91	2,780	5.17	4.48 - 4.99	30	4.79	4.99	10	4.99
Private Brand	1,420	5.10	290	5.84			4.99 - 5.99	140	5.18	4.99	1,140	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,230	2.94	12,850	3.09	10,520	3.08	2.49 - 3.99	2,690	3.32	2.00 - 3.59	1,470	2.78
Private Brand	1,160	2.98	850	2.96	3,570	2.88	2.50 - 3.50	550	3.04	2.50 - 3.59	170	2.93
Turkey 16 oz												
Processor Brand	2,890	5.43	1,200	5.49	610	5.08	4.59 - 6.99	1,110	5.09	5.00 - 5.99	1,480	5.64
Private Brand	170	4.99	80	5.49								
Chicken 7-10 oz												
Processor Brand	10,040	2.94	12,730	3.10	9,460	3.08	2.49 - 3.99	2,580	3.29	2.00 - 3.59	1,440	2.80
Private Brand	1,160	2.98	840	2.96	3,430	2.86	2.50 - 3.50	550	3.04	2.50 - 3.59	170	2.93

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)		
	84.7% of 4,200 sampled outlets			57.9% of 4,100 sampled outlets			52.8% of 2,900 sampled outlets			46.5% of 1,200 sampled outlets		
	Activity Index = 10,150			Activity Index = 4,830			Activity Index = 3,320			Activity Index = 1,360		
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	6.99 - 8.99	570	7.58	8.79 - 9.99	60	9.24	7.99	40	7.99	6.98 - 11.99	30	9.15
Private Brand	7.99 - 9.99	30	8.66	7.99	50	7.99						
Category 2												
Processor Brand	4.98 - 6.99	1,220	6.21	4.98 - 6.99	570	5.44	4.99 - 5.99	200	5.15	5.99	210	5.99
Private Brand	4.99 - 6.99	610	6.27	5.98	30	5.98	6.99	250	6.99			
Category 3												
Processor Brand	2.99 - 4.88	340	3.78	3.49 - 4.97	160	4.06	2.59	40	2.59	3.99 - 4.99	30	4.76
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 3.58	30	3.17	2.49	10	2.49	2.49 - 2.99	90	2.65			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 6.49	230	3.53	4.99	120	4.99						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.99	830	7.13	5.99 - 6.99	150	6.85	8.99	10	8.99	7.99 - 10.99	30	8.99
Private Brand	5.98 - 6.99	40	6.60	5.98 - 7.99	50	6.89						
Category 2												
Processor Brand	4.99	50	4.99									
Private Brand	4.99 - 6.58	140	5.95									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.49	2,490	2.70	1.77 - 2.00	1,790	2.74	2.48 - 3.50	1,260	3.06	1.98 - 3.50	530	3.03
Private Brand	2.50 - 3.00	400	2.91	3.00	40	3.00						
Turkey 16 oz												
Processor Brand	4.88 - 5.99	300	5.71				4.99	170	4.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.49	2,470	2.70	1.79 - 2.19	1,760	2.75	2.48 - 3.50	1,260	3.06	1.98 - 3.50	530	3.03
Private Brand	2.50 - 3.00	400	2.91	3.00	40	3.00						

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)