



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/31 thru 06/06.

Fri. May 31, 2013

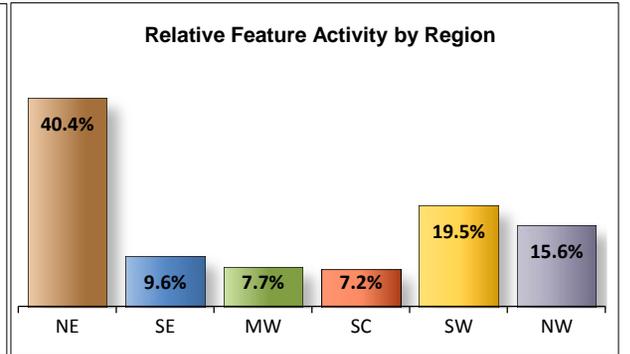
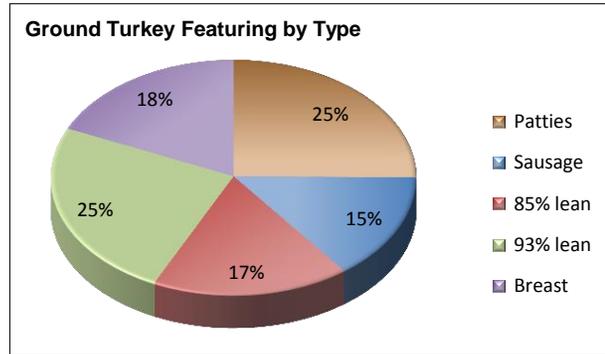
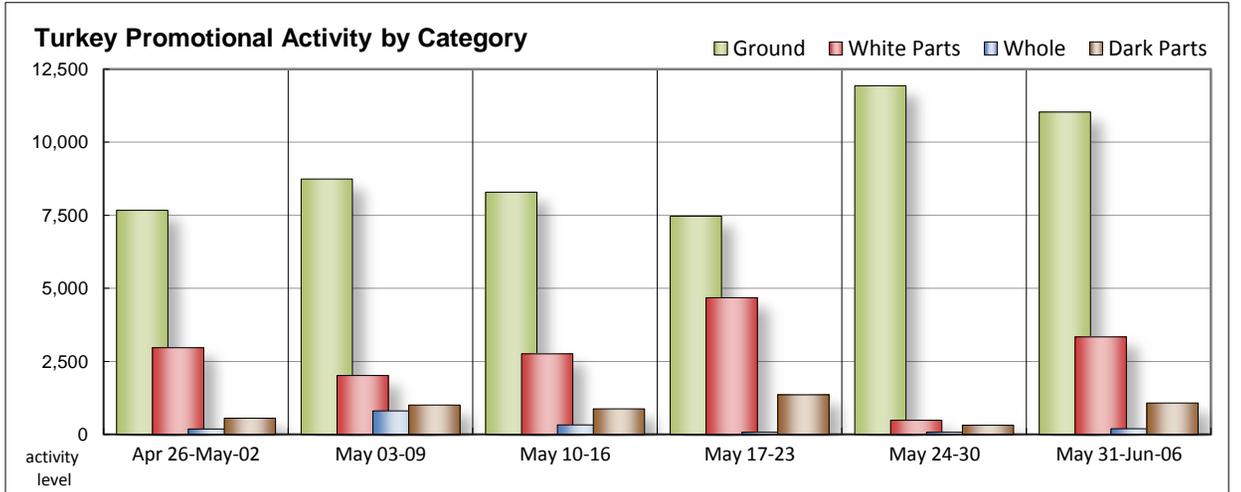
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	41.2% of 23,200 outlets		35.7% of 23,200 outlets		39.3% of 22,500 outlets	
Special Rate ^{4/}	0.6%		0.8%		1.5%	
Activity Index ^{2/}	16,760		13,920		14,090	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	100	1.11	40	0.99		
" - Toms	100	1.11	40	0.99		
PARTS:						
Breast:						
Bone-in, whole						
Fresh			30	2.19	40	2.59
Frozen	800	1.81	200	1.73	470	1.78
Split, bone-in						
Fresh	20	2.99	20	3.49		
Rotisserie	460	6.75	10	8.99	1,120	7.11
Boneless, whole	40	4.11	30	3.99	620	4.04
Cutlets	1,010	4.34	140	5.20	870	4.24
Cutlets, thin sliced					190	4.99
Strips	20	3.99			20	3.99
Tenders	990	4.21	60	4.74	850	4.12
Marinated Tenders	350	5.20	500	4.59	680	4.38
Drumsticks	40	1.42	70	1.82	90	1.57
Thighs			50	2.29		
Wings	100	2.47	30	1.74	80	1.60
Necks	10	1.29	10	1.29	50	1.69
Smoked Drumsticks	650	2.15	50	1.73	240	2.03
Smoked Wings	210	2.01	90	1.97	280	2.02
Smoked Necks	70	1.99	20	1.70	200	1.79
GROUND TURKEY:	11,030	3.47	11,930	3.19	6,980	3.76
Patties	2,770	3.60	1,670	3.39	420	3.55
Sausage	1,610	3.59	2,690	3.41	1,910	3.33
85% lean	1,920	2.53	2,400	2.72	330	2.94
93% lean	2,710	3.18	4,720	3.13	1,730	2.92
Breast	2,020	4.51	450	5.01	2,590	4.87
Rolls (frsh/frz 1 lb.)	450	2.63	50	1.86	1,180	1.19
Specialty ^{5/}						
Patties			360	4.03	40	5.99
93-94% lean	210	4.06	170	4.29	90	4.23
Breast	100	5.64	20	5.49		

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

This Week's Turkey Feature Highlights

This week, feature activity increases. Whole turkeys continue to be barely visible as retailer's attention is focused on turkey items associated with the summer season. Offerings of bone-in breasts are more available, but at higher prices. Rotisserie breasts come back into the picture. Retailers start the new month off with increased offerings of fresh cutlets and tenders; values are lower than last week. Fewer marinated tenders are seen and at higher pricing levels. There are more opportunities if you are looking for smoked dark parts, but you will pay more. Grind offers decline some from the previous week. If grilling is in the plans, patties and 93% lean account for half of the grinds featured. Prices are lower for ground breast and 85% lean, higher for the balance ground turkey items. As summer has unofficially begun, feature activity increases on deli items. Service deli thick and thin slicing meats are promoted more this week. Prices are lower for processor label whole muscle meats and private label value products. Family pack self-service gains more circular space for both processor and private brands at lower pricing.



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/}	69.0% of 4,600 sampled outlets			34.3% of 6,100 sampled outlets			22.6% of 4,200 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			0.8% of stores w/ no-price promotions			0.5% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 8,050			Activity Index = 2,610			Activity Index = 1,390		
	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	40	1.19	1.19	20	1.19			
" - Toms	1.19	40	1.19	1.19	20	1.19			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57 - 1.99	230	1.95	1.29 - 1.99	100	1.64	1.38 - 1.89	120	1.70
Split, bone-in									
Fresh	2.99	20	2.99						
Rotisserie	4.99 - 7.99	210	5.23	7.99	110	7.99			
Boneless, whole	3.99 - 4.99	30	4.15						
Cutlets	3.99 - 5.99	850	4.34	3.99	70	3.99	5.45 - 5.90	30	5.78
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.99	710	4.25	3.99	70	3.99	4.79 - 5.19	30	5.08
Marinated Tenders	4.79 - 5.99	160	5.41	5.33	90	5.33	4.66 - 5.33	100	4.75
Drumsticks	1.59	10	1.59	1.29	10	1.29	1.29	10	1.29
Thighs									
Wings	1.59 - 2.99	60	2.60	1.79 - 2.99	30	2.61	1.29	10	1.29
Necks							1.29	10	1.29
Smoked Drumsticks	1.99 - 2.19	620	2.15	2.39	10	2.39	1.99	10	1.99
Smoked Wings	1.99	180	1.99	2.39	10	2.39	1.99	10	1.99
Smoked Necks	1.99	70	1.99						
GROUND TURKEY:									
Patties	2.99 - 4.00	1,130	3.43	2.99 - 3.99	1,200	3.94	3.00 - 3.99	20	3.55
Sausage	3.19 - 3.99	1,170	3.53	3.00 - 3.50	60	3.24	3.19	10	3.19
85% lean	2.29 - 3.29	640	2.62	2.19 - 2.69	290	2.51	1.99 - 3.16	320	2.40
93% lean	2.66 - 3.84	1,540	3.06	2.66 - 3.00	300	2.86	2.90 - 3.49	90	3.30
Breast (99-100% lean)	3.84 - 4.61	150	4.07	3.99 - 4.99	130	4.82	3.99 - 4.79	210	4.32
Rolls (frsh/frz 1 lb.)	3.00	70	3.00	1.69 - 3.00	80	2.01	1.89 - 2.79	250	2.72
Specialty ^{5/}									
Patties									
93-94% lean	3.99 - 4.99	50	4.09				3.99 - 4.49	150	4.05
Breast	5.00 - 6.99	70	5.71	5.49	10	5.49	5.49	10	5.49



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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)		
Feature Rate ^{1/}	25.3% of 4,200 sampled outlets			53.3% of 2,900 sampled outlets			57.6% 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 = 1,300			Activity Index = 2,560			Activity Index = 850		
	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	40	0.99						
" - Toms	0.99	40	0.99						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.59 - 2.49	270	1.93	2.49	10	2.49	1.19	70	1.19
Split, bone-in									
Fresh									
Rotisserie	8.99	10	8.99	7.99	130	7.99			
Boneless, whole	3.99	10	3.99						
Cutlets	3.99	60	3.99						
Cutlets, thin sliced									
Strips	3.99	20	3.99						
Tenders				3.99	180	3.99			
Marinated Tenders									
Drumsticks				1.49	10	1.49			
Thighs									
Wings									
Necks									
Smoked Drumsticks				1.99	10	1.99			
Smoked Wings				1.99	10	1.99			
Smoked Necks									
GROUND TURKEY:									
Patties	2.79 - 5.49	20	4.28	2.99 - 3.99	390	3.03	3.99	10	3.99
Sausage	3.68	110	3.68	3.27	10	3.27	3.27 - 4.09	250	3.97
85% lean	2.49 - 2.50	60	2.50	2.49 - 2.63	580	2.50	2.70 - 2.71	30	2.70
93% lean	3.16 - 3.59	190	3.41	3.00 - 3.59	250	3.20	2.79 - 3.99	340	3.83
Breast (99-100% lean)	4.39 - 4.99	420	4.61	3.99 - 5.35	980	4.52	3.99 - 4.61	130	4.57
Rolls (frsh/frz 1 lb.)	1.89 - 2.79	50	2.60						
Specialty ^{5/}									
Patties									
93-94% lean							3.99	10	3.99
Breast							5.49	10	5.49



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. May 31, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/31 thru 06/06.

(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		85.7% of 4,600 sampled outlets			82.6% of 6,100 sampled outlets		
Feature Rate ^{1/}	75.1% of 23,200 stores		68.5% of 23,200 stores		79.7% of 22,500 stores		Activity Index = 11,400			Activity Index = 12,580		
Activity Index ^{2/}	49,390		44,300		45,040		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	5,550	8.12	5,320	8.25	3,860	7.44	6.49 - 12.99	2,970	8.31	6.99 - 8.99	650	8.21
Private Brand	1,680	7.65	1,340	7.27	2,310	7.66	6.99 - 7.99	1,210	7.73	7.49 - 7.99	170	7.68
Category 2												
Processor Brand	5,530	6.09	3,770	5.70	5,350	6.02	4.98 - 6.99	1,420	6.19	4.99 - 6.99	1,740	6.51
Private Brand	8,190	7.14	4,460	7.01	5,430	6.76	4.99 - 7.99	1,440	6.36	5.99 - 6.99	1,500	6.89
Category 3												
Processor Brand	750	4.10	1,340	4.05	900	3.83	3.99 - 4.99	120	4.19	3.99 - 4.99	210	4.75
Private Brand	60	4.98	230	5.18	1,510	5.46	5.48	40	5.48			
Turkey Ham												
Processor Brand	80	3.02	270	3.64	530	3.67						
Private Brand	20	4.99	40	4.48	20	3.99	4.99	20	4.99			
Turkey Pastrami												
Processor Brand	90	4.50	150	4.24	460	3.70	3.99	60	3.99			
Private Brand			120	4.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,580	7.96	3,960	7.27	4,410	7.33	6.49 - 9.99	1,680	8.34	5.49 - 8.99	830	7.79
Private Brand	290	6.85	2,390	7.06	1,590	6.89	6.49	40	6.49	5.99 - 6.49	30	6.33
Category 2												
Processor Brand	350	6.42	660	5.59	260	6.68	5.99	10	5.99			
Private Brand	180	5.99	170	5.99	310	6.81						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	5,630	3.14	6,420	3.03	7,170	3.08	2.50 - 3.99	790	3.13	1.97 - 3.59	2,220	3.14
Private Brand	4,400	3.46	3,080	3.41	2,090	3.07	2.50 - 3.29	170	2.59	2.50 - 3.99	740	3.61
Turkey 16 oz												
Processor Brand	2,150	4.40	1,350	4.98	330	5.20	3.99 - 4.99	480	4.57	3.99 - 4.99	490	4.08
Private Brand	1,040	3.99								3.99	1,040	3.99
Chicken 7-10 oz												
Processor Brand	5,440	3.17	6,150	3.02	6,530	3.12	2.50 - 3.99	780	3.12	2.00 - 3.59	2,220	3.16
Private Brand	4,380	3.47	3,080	3.41	1,980	3.05	2.50 - 3.29	170	2.59	2.50 - 3.99	740	3.61

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)		
	70.4% of 4,200 sampled outlets			66.6% of 4,200 sampled outlets			61.0% of 2,900 sampled outlets			75.6% of 1,200 sampled outlets		
	Activity Index = 8,970			Activity Index = 7,570			Activity Index = 7,020			Activity Index = 1,850		
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	5.98 - 9.99	640	7.71	5.99 - 10.49	530	7.76	6.99 - 10.99	660	7.73	7.99 - 12.99	100	9.33
Private Brand	7.99 - 10.99	40	8.83	6.99 - 7.99	260	7.08						
Category 2												
Processor Brand	4.98 - 6.99	1,020	5.84	4.99 - 5.99	1,070	5.73	4.99	210	4.99	5.98 - 5.99	70	5.98
Private Brand	4.98 - 7.49	1,090	6.14	6.49 - 7.99	1,260	7.56	7.99	2,390	7.99	6.99 - 7.49	510	7.12
Category 3												
Processor Brand	2.99 - 4.99	180	3.96	2.99 - 4.49	200	3.48				3.99 - 4.47	40	4.21
Private Brand	3.98	10	3.98	3.99	10	3.99						
Turkey Ham												
Processor Brand	3.49	10	3.49				2.69 - 3.29	70	2.95			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49 - 6.99	30	5.52									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.99	680	7.26	5.99 - 8.59	320	7.41				9.99	70	9.99
Private Brand	8.49	10	8.49	5.99	80	5.99				7.49	130	7.49
Category 2												
Processor Brand	3.88 - 6.99	250	6.41	5.99 - 6.99	90	6.48						
Private Brand	5.99	180	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.50 - 4.00	920	2.97	2.00 - 3.00	670	2.64	3.00 - 3.87	830	3.65	3.50	200	3.50
Private Brand	2.50 - 3.99	1,160	3.39	2.79 - 3.99	1,170	3.46	2.79 - 3.99	1,000	3.59	2.79 - 3.99	160	3.48
Turkey 16 oz												
Processor Brand	3.99 - 4.99	700	4.25	3.99 - 4.99	250	4.30	3.99	20	3.99	3.99 - 5.49	210	5.42
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.50 - 4.00	910	2.97	2.00 - 3.00	490	2.68	3.00 - 3.87	840	3.65	3.50	200	3.50
Private Brand	2.50 - 3.99	1,140	3.41	2.79 - 3.99	1,170	3.46	2.79 - 3.99	1,000	3.59	2.79 - 3.99	160	3.48

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)