



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/21 thru 06/27.**

Fri. Jun 21, 2013

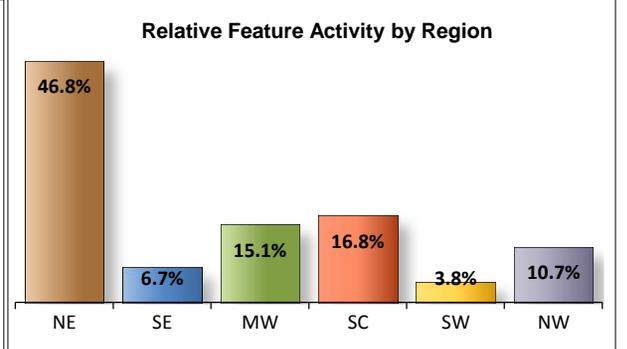
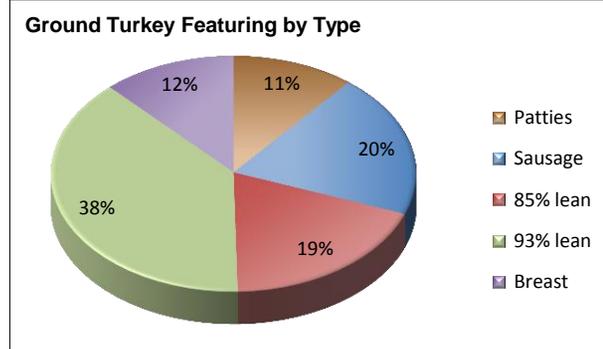
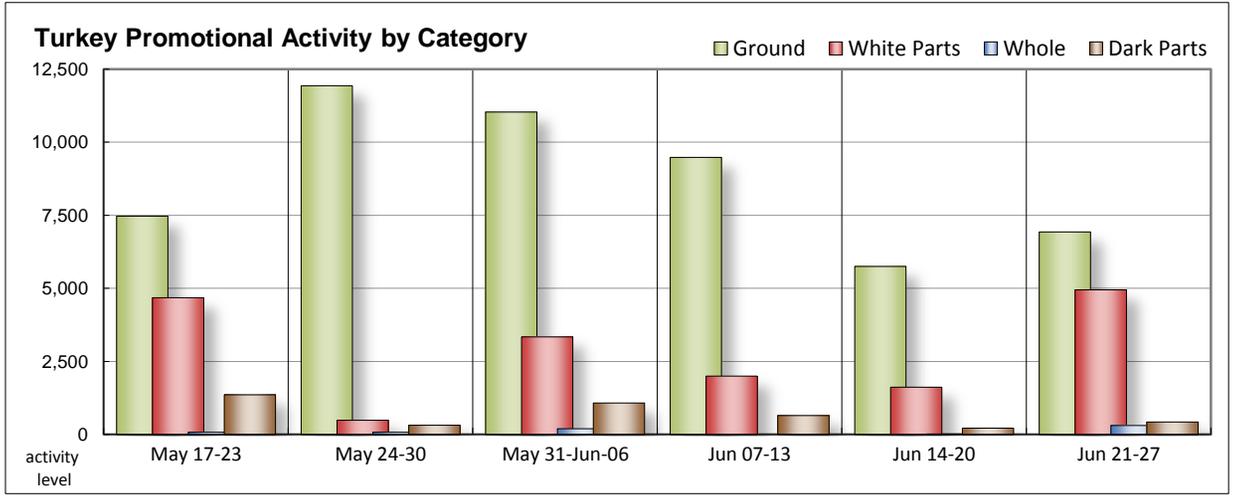
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>36.6% of 23,200 outlets</b>		<b>24.2% of 23,200 outlets</b>		<b>24.2% of 22,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>1.7%</b>		<b>1.2%</b>		<b>2.2%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>14,270</b>		<b>8,690</b>		<b>12,640</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens					30	1.48
" - Toms					30	1.48
Frozen - Hens	210	1.05	10	1.00	280	1.11
" - Toms	100	1.11	10	1.00	280	1.11
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	20	2.79			10	2.29
Frozen	1,960	1.53	550	1.79	340	1.80
Split, bone-in						
Fresh	250	2.99			210	2.99
Rotisserie	460	9.11	350	7.33	340	7.82
Boneless, whole	190	5.94	50	4.31	630	4.15
Cutlets	1,080	4.48	370	4.48	1,240	4.73
Cutlets, thin sliced	370	5.71	130	4.99		
Strips	20	3.59			240	5.99
Tenders	600	4.19	170	4.06	1,160	4.52
Marinated Tenders	200	4.24	410	4.18	580	4.32
Drumsticks	40	1.83			100	1.36
Thighs	10	1.79			20	1.79
Wings	50	1.93	20	2.24	100	1.74
Necks	20	1.74				
Smoked Drumsticks	180	2.16	140	2.02	30	1.82
Smoked Wings	130	1.97	40	2.32	20	1.79
Smoked Necks			20	1.99	20	1.79
<b>GROUND TURKEY:</b>	<b>6,930</b>	<b>3.32</b>	<b>5,750</b>	<b>3.48</b>	<b>4,980</b>	<b>3.20</b>
Patties	760	3.57	630	3.79	940	3.22
Sausage	1,370	3.49	1,170	3.53	1,100	3.37
85% lean	1,310	2.56	890	2.66	870	2.33
93% lean	2,660	3.23	2,100	3.26	1,490	3.04
Breast	830	4.59	960	4.52	580	4.52
Rolls (frsh/frz 1 lb.)	390	2.04	10	3.49	460	1.42
<b>Specialty</b> <sup>5/</sup>						
Patties	10	4.99	160	3.32	140	4.48
93-94% lean	440	4.15	500	4.17	590	4.00
Breast	610	5.98			810	6.22

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

**This Week's Turkey Feature Highlights**

Retail feature activity increases going into the end of the month. More stores are showing frozen hens and toms in this week's circulars. Frozen bone-in breasts are heavily promoted and prices are sharply lower. More stores are featuring rotisserie breasts; these could be a good alternative to cooking in the hot days ahead. Boneless white parts are actively promoted, especially cutlets at steady prices. Offerings increase on dark parts; smoked drums and wings are the most popular items. Ground turkey is finally getting more ad space; prices are mostly lower. As usual, featuring is most active on 93% lean and prices are lower this week. Specialty grinds are more active, particularly on ground breast. Deli feature activity is sharply higher as summer officially begins. Service deli offerings and prices increase on private label thick and thin slicing turkey meats; fewer ads feature chicken. Self-service deli offerings account for a larger share of the deli ads; featuring is more active on processor labels at lower prices.



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)		
<b>Feature Rate</b> <sup>1/</sup>	67.1% of 4,600 sampled outlets			22.8% of 6,100 sampled outlets			36.4% of 4,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	1.0% of stores w/ no-price promotions			3.4% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 7,390			Activity Index = 1,450			Activity Index = 2,160		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.19	40	1.19	1.19	20	1.19	0.99	50	0.99
" - Toms	1.19	40	1.19	1.19	20	1.19			
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.48 - 1.49	400	1.49	1.49	440	1.49	1.48 - 1.89	860	1.56
Split, bone-in									
Fresh									
Rotisserie	6.89 - 9.99	220	9.27						
Boneless, whole									
Cutlets	3.49 - 5.99	940	4.50	3.99 - 4.59	80	4.13	4.99	10	4.99
Cutlets, thin sliced									
Strips							4.99	100	4.99
Tenders	3.99	410	3.99				4.79 - 4.99	120	4.98
Marinated Tenders	4.79	50	4.79	3.99	110	3.99	4.53	20	4.53
Drumsticks	1.59 - 1.79	20	1.67				1.69	10	1.69
Thighs	1.79	10	1.79						
Wings	1.59 - 2.49	30	1.89				1.69	10	1.69
Necks	1.79	10	1.79				1.69	10	1.69
Smoked Drumsticks	1.99	120	1.99	2.50	60	2.50			
Smoked Wings	1.99	120	1.99				1.69	10	1.69
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.99 - 3.99	450	3.50				2.99 - 3.69	120	3.16
Sausage	2.49 - 4.39	1,010	3.45	2.99 - 3.99	260	3.79	2.79 - 3.99	50	3.36
85% lean	2.53 - 3.07	660	2.67	2.50 - 2.66	140	2.58	2.33 - 2.50	110	2.47
93% lean	2.79 - 4.99	1,530	3.30	2.90 - 3.07	220	2.92	2.80 - 3.50	310	3.19
Breast (99-100% lean)	4.16 - 5.38	260	4.76	4.16	20	4.16	4.16 - 4.79	10	4.50
Rolls (frsh/frz 1 lb.)							1.98 - 2.99	220	2.44
<b>Specialty</b> <sup>5/</sup>									
Patties	4.99	10	4.99						
93-94% lean	3.99 - 4.99	290	4.19	3.99	10	3.99	3.99	120	3.99
Breast	5.99	520	5.99	5.99	70	5.99			



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/21 thru 06/27.**

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(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)		
<b>Feature Rate</b> <sup>1/</sup>	35.3% of 4,200 sampled outlets			18.2% of 2,900 sampled outlets			41.1% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			10.6% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 2,410			Activity Index = 400			Activity Index = 460		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99	100	0.99						
" - Toms	0.99	40	0.99						
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh	2.79	20	2.79						
Frozen	1.49 - 1.89	230	1.59	1.49	20	1.49	1.49	10	1.49
Split, bone-in									
Fresh									
Rotisserie	6.99 - 8.99	110	8.40	8.99	70	8.99	9.99	60	9.99
Boneless, whole									
Cutlets	5.99	180	5.99				5.45	20	5.45
Cutlets, thin sliced	3.59	20	3.59						
Strips	5.97	270	5.97						
Tenders	3.59	20	3.59						
Tenders	3.29	20	3.29	3.99	30	3.99	4.79	20	4.79
Marinated Tenders							3.99	20	3.99
Drumsticks	2.29	10	2.29						
Thighs									
Wings	2.29	10	2.29						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.99	180	3.99	3.99	10	3.99			
Sausage	2.39	30	2.39	3.27	10	3.27	3.27	10	3.27
85% lean	1.66 - 2.08	360	2.36				2.50 - 2.79	40	2.71
93% lean	2.49 - 3.50	330	3.21	2.80 - 3.99	260	3.12	3.99	10	3.99
Breast (99-100% lean)	3.74 - 4.79	310	4.34				3.99 - 4.79	230	4.76
Rolls (frsh/frz 1 lb.)	0.97 - 2.39	170	1.53						
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean							3.99 - 4.99	20	4.58
Breast							5.49 - 5.99	20	5.79



**USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jun 21, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/21 thru 06/27.

(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		90.0% of 4,600 sampled outlets			67.1% of 6,100 sampled outlets		
Feature Rate <sup>1/</sup>	74.1% of 23,200 stores		58.8% of 23,200 stores		73.3% of 22,500 stores		Activity Index = 12,910			Activity Index = 11,900		
Activity Index <sup>2/</sup>	48,120		40,220		48,220		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						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,330	7.98	5,600	8.13	3,830	7.85	6.98 - 9.99	2,120	8.21	6.39 - 8.99	1,430	7.76
Private Brand	2,030	7.53	1,860	7.80	1,860	7.87	6.98 - 7.99	800	7.04	6.99 - 8.99	1,100	7.90
<b>Category 2</b>												
Processor Brand	4,910	5.81	5,610	5.85	3,910	6.08	4.99 - 6.99	2,050	5.91	4.99 - 5.99	620	5.80
Private Brand	4,510	7.17	1,880	6.08	5,370	6.69	4.99 - 7.99	1,170	5.70	4.99 - 7.99	530	5.47
<b>Category 3</b>												
Processor Brand	660	3.86	830	4.06	1,030	4.11	2.99 - 4.99	280	3.71	3.99	210	3.99
Private Brand	20	3.88	90	5.31	180	4.88	3.88	20	3.88			
<b>Turkey Ham</b>												
Processor Brand	340	3.57	410	4.06	510	3.74	2.98 - 6.98	220	3.79			
Private Brand	40	4.48			40	3.98	4.48	40	4.48			
<b>Turkey Pastrami</b>												
Processor Brand	340	4.36	270	3.60	440	3.88	3.79 - 4.49	200	4.14			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,580	8.06	3,750	7.19	6,420	7.52	5.99 - 8.99	1,260	7.70	6.99 - 8.99	170	8.64
Private Brand	1,660	6.88	1,730	8.11	1,550	7.13	5.99 - 6.99	1,000	6.89	5.99 - 6.99	560	6.78
<b>Category 2</b>												
Processor Brand	240	5.04	240	4.80	710	6.73	5.88	20	5.88			
Private Brand	10	5.98	200	5.99	390	5.48						
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	10,790	2.77	6,080	3.01	8,270	3.05	2.50 - 3.99	1,470	3.09	2.27 - 3.69	3,010	2.95
Private Brand	2,180	3.48	2,370	3.47	3,140	2.77	3.00 - 3.33	180	3.31	3.00 - 3.33	630	3.23
<b>Turkey 16 oz</b>												
Processor Brand	920	4.81	920	5.45	510	5.09	4.49 - 5.99	500	4.87	5.99	10	5.99
Private Brand					200	5.00						
<b>Chicken 7-10 oz</b>												
Processor Brand	10,380	2.77	6,010	3.02	6,920	3.09	2.50 - 3.99	1,400	3.07	2.27 - 3.69	3,000	2.94
Private Brand	2,180	3.48	2,370	3.47	2,940	2.79	3.00 - 3.33	180	3.31	3.00 - 3.33	630	3.23

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. Jun 21, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/21 thru 06/27.

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

Feature Rate <sup>1/</sup>	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)		
	80.8% of 4,200 sampled outlets			72.4% of 4,200 sampled outlets			57.8% of 2,900 sampled outlets			70.8% of 1,200 sampled outlets		
	Activity Index = 8,310			Activity Index = 6,790			Activity Index = 5,690			Activity Index = 2,520		
Activity Index <sup>2/</sup>	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	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6.49 - 11.99	400	7.52	6.99 - 10.99	240	7.90				6.99 - 12.99	140	8.10
Private Brand	8.99	20	8.99	6.99	100	6.99				8.99	10	8.99
<b>Category 2</b>												
Processor Brand	4.49 - 6.99	1,120	5.65	4.69 - 7.99	780	5.89	4.99 - 5.99	320	5.51	5.48	20	5.48
Private Brand	4.99 - 7.99	340	6.49	5.99 - 7.99	720	7.92	7.99 - 8.99	1,100	8.50	7.99 - 8.99	650	8.47
<b>Category 3</b>												
Processor Brand	3.88 - 3.99	40	3.94	3.49 - 4.49	90	3.99				3.79	40	3.79
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	3.98	20	3.98	2.99 - 3.19	20	3.11	2.49 - 3.29	80	2.97			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.98 - 4.99	130	4.73							3.99	10	3.99
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 10.99	450	8.14	5.99 - 8.99	360	7.72	6.99 - 9.99	270	9.75	6.99 - 7.99	70	7.90
Private Brand	7.99	20	7.99	6.99 - 7.99	80	7.31						
<b>Category 2</b>												
Processor Brand	4.49 - 5.49	220	4.96									
Private Brand	5.98	10	5.98									
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	1.99 - 3.68	2,450	2.51	2.50 - 2.99	1,800	2.64	2.50 - 3.00	1,550	2.72	2.50 - 2.99	510	2.60
Private Brand	2.50 - 3.00	330	2.56	3.33 - 3.99	350	3.89	3.99	410	3.99	3.99	280	3.99
<b>Turkey 16 oz</b>												
Processor Brand	3.99 - 4.99	30	4.33	4.99 - 5.00	380	4.73						
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	1.99 - 3.68	2,400	2.51	2.50 - 2.99	1,520	2.65	2.50 - 3.00	1,550	2.72	2.50 - 2.99	510	2.60
Private Brand	2.50 - 3.00	330	2.56	3.33 - 3.99	350	3.89	3.99	410	3.99	3.99	280	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)

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