



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/28 thru 07/04.**

Fri. Jun 28, 2013

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

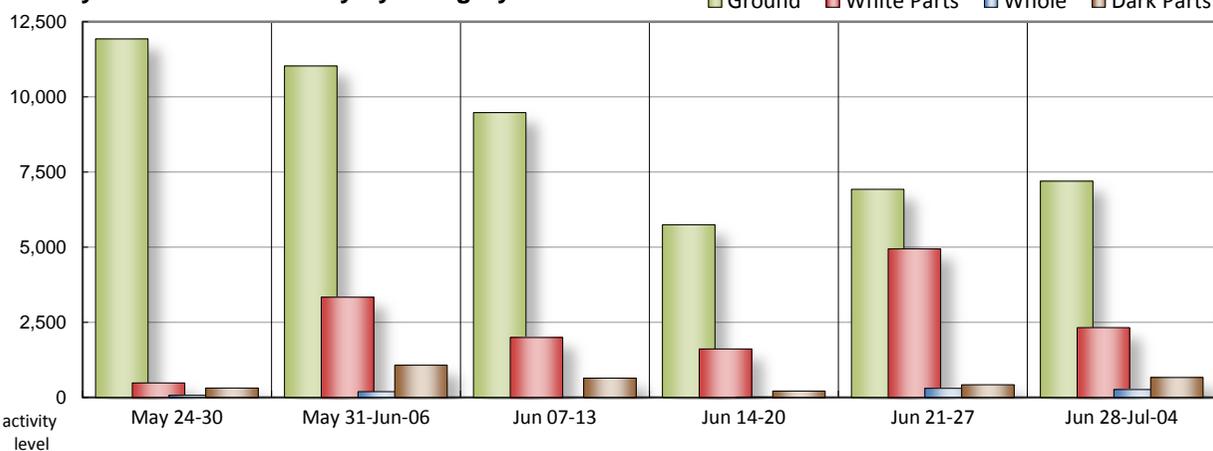
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate <sup>1/</sup>	41.5% of 23,200 outlets		36.6% of 23,200 outlets		35.1% of 22,500 outlets	
Special Rate <sup>4/</sup>	9.9%		1.7%		0.8%	
Activity Index <sup>2/</sup>	12,000		14,270		13,960	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
<b>WHOLE BIRDS:</b>						
Fresh - Hens					10	1.59
" - Toms						
Frozen - Hens	140	1.07	210	1.05	30	1.34
" - Toms	130	1.08	100	1.11	50	1.43
<b>PARTS:</b>						
Breast:						
Bone-in, whole						
Fresh	40	2.29	20	2.79		
Frozen	1,530	1.50	1,960	1.53	610	2.01
Split, bone-in						
Fresh			250	2.99	260	3.00
Rotisserie	120	7.16	460	9.11	140	6.26
Boneless, whole	10	4.99	190	5.94	200	4.03
Cutlets	430	4.62	1,080	4.48	650	4.79
Cutlets, thin sliced			370	5.71		
Strips			20	3.59		
Tenders	200	4.03	600	4.19	430	4.05
Marinated Tenders	240	4.26	200	4.24	1,260	4.28
Drumsticks	250	1.88	40	1.83	90	1.49
Thighs	40	2.29	10	1.79	90	1.79
Wings	230	1.91	50	1.93	40	1.55
Necks	10	1.29	20	1.74	10	1.69
Smoked Drumsticks	70	1.82	180	2.16	80	2.47
Smoked Wings	70	1.82	130	1.97	40	2.19
Smoked Necks					50	1.89
<b>GROUND TURKEY:</b>						
	7,200	3.13	6,930	3.32	8,300	3.45
Patties	970	3.41	760	3.57	1,120	3.53
Sausage	1,520	3.41	1,370	3.49	1,590	3.41
85% lean	1,630	2.66	1,310	2.56	640	2.42
93% lean	2,890	3.12	2,660	3.23	3,150	3.08
Breast	190	4.01	830	4.59	1,800	4.58
Rolls (frsh/frz 1 lb.)	590	2.02	390	2.04	160	2.35
<b>Specialty <sup>5/</sup></b>						
Patties	430	5.00	10	4.99	650	3.58
93-94% lean	260	4.04	440	4.15	610	3.56
Breast	10	6.99	610	5.98	200	5.99

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

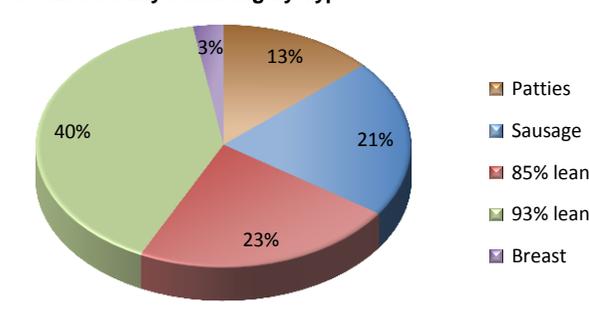
**This Week's Turkey Feature Highlights**

Retail feature activity continues to increase heading toward the Fourth of July holiday. Offerings on frozen whole turkeys are less active; prices are higher on hens, lower on toms. Shoppers will find fewer frozen bone-in breasts featured, but there are still plenty of promotions and prices are lower. Feature activity slows on rotisserie breasts; advertised prices are sharply lower where available. Promotional activity on boneless white parts declines; prices are mixed. Offerings increase on dark parts; fresh drums and wings are the most actively promoted items. Ground turkey continues to gain more space in the circulars; the weighted average price is lower. Turkey burgers or sausage on the grill would make a tasty cook-out. Deli feature activity slows. Service deli market activity is unchanged from last week; offerings decline on thick and thin slicing meats, increase on value products. Self-service deli offerings decline; stores increase promotions on processor brands and decrease promotions on private brands. The self-service private brands are the best buy this week.

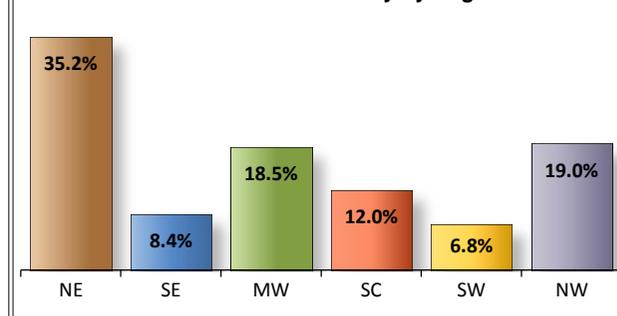
**Turkey Promotional Activity by Category**



**Ground Turkey Featuring by Type**



**Relative Feature Activity by Region**



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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	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>	51.6% of 4,600 sampled outlets			38.1% of 6,100 sampled outlets			35.6% of 4,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	2.3% of stores w/ no-price promotions			18.6% of stores w/ no-price promotions			0.2% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 5,020			Activity Index = 1,640			Activity Index = 2,400		
	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	0.99 - 1.19	30	1.12			
" - Toms	1.19	40	1.19	1.19	20	1.19			
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh									
Frozen	1.49	200	1.49	1.49 - 1.59	510	1.50	1.18 - 1.79	540	1.51
Split, bone-in									
Fresh									
Rotisserie	8.99	10	8.99	6.99	110	6.99			
Boneless, whole	4.99	10	4.99						
Cutlets	3.99 - 5.99	300	4.62	3.99 - 5.99	50	4.62	5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders	3.99	150	3.99	3.99	40	3.99	4.79	10	4.79
Marinated Tenders	4.26	240	4.26						
Drumsticks	1.78 - 1.99	150	1.83				1.29 - 1.99	100	1.96
Thighs	2.29	40	2.29						
Wings	1.78 - 2.49	130	1.87				1.29 - 1.99	100	1.96
Necks							1.29	10	1.29
Smoked Drumsticks	1.79	60	1.79				1.99	10	1.99
Smoked Wings	1.79	60	1.79				1.99	10	1.99
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.99 - 4.99	350	3.55	3.00 - 3.49	330	3.18	2.98 - 3.50	220	3.46
Sausage	2.79 - 4.09	770	3.50				2.87 - 3.90	480	3.28
85% lean	2.30 - 3.33	760	2.62	2.50 - 2.99	200	2.57	2.33 - 3.00	240	2.50
93% lean	2.68 - 3.84	1,150	3.03	2.74 - 3.00	140	2.94	2.50 - 3.75	500	3.17
Breast (99-100% lean)	3.84	70	3.84				3.99 - 4.79	100	4.04
Rolls (frsh/frz 1 lb.)	2.99	10	2.99				1.99 - 2.36	70	2.02
<b>Specialty</b> <sup>5/</sup>									
Patties	3.99 - 5.99	430	5.00						
93-94% lean	3.99 - 4.29	40	4.14	3.99	210	3.99			
Breast	6.99	10	6.99						



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/28 thru 07/04.**

Fri. Jun 28, 2013

(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 <sup>1/</sup>	33.5% of 4,200 sampled outlets			42.2% of 2,900 sampled outlets			64.2% of 1,200 sampled outlets		
Special Rate <sup>4/</sup>	0.0% of stores w/ no-price promotions			24.8% of stores w/ no-price promotions			24.7% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 1,560			Activity Index = 640			Activity Index = 740		
	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	40	0.99	0.99	30	0.99			
" - Toms	0.99	40	0.99	0.99	30	0.99			
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh							2.29	40	2.29
Frozen	1.19 - 1.68	250	1.48	1.49	20	1.49	1.49	10	1.49
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	4.49	70	4.49						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.49	40	3.49	3.99	10	3.99	3.49	20	3.49
Sausage	2.91	40	2.91	4.99	30	4.99	3.27	200	3.27
85% lean	2.49 - 3.33	370	2.96	2.40	40	2.40	2.33	20	2.33
93% lean	2.91 - 3.19	630	3.15	2.80 - 3.19	50	2.91	3.19 - 3.99	420	3.32
Breast (99-100% lean)							4.39	20	4.39
Rolls (frsh/frz 1 lb.)	2.00 - 2.99	80	2.47	1.50 - 2.49	420	1.89	2.89	10	2.89
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean				4.59	10	4.59			
Breast									



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

Fri. Jun 28, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/28 thru 07/04.

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

	NATIONAL SUMMARY					
	This Week		Last Week		Last Year	
Feature Rate <sup>1/</sup>	77.7% of 23,200 stores		74.1% of 23,200 stores		73.6% of 22,500 stores	
Activity Index <sup>2/</sup>	45,720		48,120		46,890	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
<b>SERVICE DELI - Turkey</b>						
<b>Category 1</b>						
Processor Brand	3,480	8.35	4,330	7.98	8,230	7.80
Private Brand	2,100	7.44	2,030	7.53	3,640	7.62
<b>Category 2</b>						
Processor Brand	5,180	5.71	4,910	5.81	4,210	5.65
Private Brand	3,550	6.77	4,510	7.17	3,370	6.47
<b>Category 3</b>						
Processor Brand	1,050	3.94	660	3.86	820	3.96
Private Brand	140	4.95	20	3.88	1,560	5.72
<b>Turkey Ham</b>						
Processor Brand	270	3.56	340	3.57	270	2.62
Private Brand			40	4.48		
<b>Turkey Pastrami</b>						
Processor Brand	110	4.23	340	4.36	80	4.49
Private Brand						
<b>SERVICE DELI - Chicken</b>						
<b>Category 1</b>						
Processor Brand	3,960	7.32	2,580	8.06	2,540	6.99
Private Brand	1,330	7.19	1,660	6.88	2,470	7.18
<b>Category 2</b>						
Processor Brand	470	5.89	240	5.04	50	5.30
Private Brand	20	4.69	10	5.98	330	5.98
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)						
<b>Turkey 7-10 oz</b>						
Processor Brand	9,500	3.01	10,790	2.77	8,090	3.25
Private Brand	2,590	2.96	2,180	3.48	1,470	2.98
<b>Turkey 16 oz</b>						
Processor Brand	320	4.48	920	4.81	270	4.37
Private Brand					160	4.99
<b>Chicken 7-10 oz</b>						
Processor Brand	9,060	3.03	10,380	2.77	7,900	3.26
Private Brand	2,590	2.96	2,180	3.48	1,430	2.99

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)			
91.4% of 4,600 sampled outlets				67.3% of 6,100 sampled outlets			
Activity Index = 12,510				Activity Index = 8,600			
Price Range (\$/pound)		Summary Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg	
6.77 - 10.99		2,290 8.53		6.99 - 9.99		260 9.54	
6.99 - 8.99		1,590 7.41		7.49 - 7.99		170 7.68	
4.99 - 6.99		2,030 5.75		4.99 - 6.99		580 5.73	
4.69 - 6.99		460 5.59		5.99 - 6.99		330 6.82	
3.99 - 4.99		470 4.19		3.99		60 3.99	
3.98 - 3.99		170 3.99					
3.99 - 4.99		110 4.23					
5.98 - 8.99		1,510 7.75		5.49 - 7.99		1,310 7.01	
6.99 - 7.99		350 7.70		6.49		60 6.49	
2.49 - 3.99		1,460 3.23		2.19 - 3.99		2,350 3.05	
2.50		290 2.50		2.50 - 3.99		570 3.00	
5.29		30 5.29					
2.49 - 3.99		1,460 3.23		2.19 - 3.99		2,340 3.05	
2.50		290 2.50		2.50 - 3.99		570 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)



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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)			
	90.2% of 4,200 sampled outlets Activity Index = 11,000				69.2% of 4,200 sampled outlets Activity Index = 7,460				72.8% of 2,900 sampled outlets Activity Index = 4,360			74.1% of 1,200 sampled outlets Activity Index = 1,790			
	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	5.99 - 10.99	550	7.06		6.99 - 9.99	90	7.54		7.99 - 10.99	250	8.43		6.99 - 11.99	40	9.25
Private Brand	6.99 - 9.99	150	7.88		6.99 - 7.99	190	7.11								
<b>Category 2</b>															
Processor Brand	4.98 - 6.99	1,290	5.99		4.49 - 5.99	660	5.42		4.99	410	4.99		5.99	210	5.99
Private Brand	5.88 - 6.99	820	6.31		6.49 - 8.49	620	7.52		5.99 - 7.99	850	7.07		6.99 - 7.99	470	7.16
<b>Category 3</b>															
Processor Brand	2.98 - 3.99	290	3.83		3.39 - 3.99	200	3.56						2.99 - 3.99	30	3.33
Private Brand	4.49	10	4.49						4.99	130	4.99				
<b>Turkey Ham</b>															
Processor Brand	3.58	10	3.58		2.59 - 3.19	20	2.90		2.59 - 2.89	70	2.69				
Private Brand															
<b>Turkey Pastrami</b>															
Processor Brand															
Private Brand															
<b>SERVICE DELI - Chicken</b>															
<b>Category 1</b>															
Processor Brand	5.69 - 9.99	670	6.91		5.99 - 10.99	420	7.35		6.99 - 8.99	20	7.83		6.99 - 10.99	30	8.19
Private Brand	5.99 - 6.99	460	6.21		6.99 - 8.49	270	8.03		7.99	40	7.99		7.49 - 7.99	150	7.54
<b>Category 2</b>															
Processor Brand	3.99 - 4.99	40	4.87		5.99	260	5.99		5.99	150	5.99		5.99	20	5.99
Private Brand	4.69	20	4.69												
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)															
<b>Turkey 7-10 oz</b>															
Processor Brand	2.00 - 3.99	2,420	2.77		2.00 - 2.69	1,970	2.92		2.50 - 3.50	950	3.30		2.50 - 3.50	350	3.09
Private Brand	2.50 - 3.99	1,040	3.37		2.50	350	2.50		2.50	270	2.50		2.50	70	2.50
<b>Turkey 16 oz</b>															
Processor Brand	3.99 - 4.99	110	4.78		3.99 - 4.99	180	4.15								
Private Brand															
<b>Chicken 7-10 oz</b>															
Processor Brand	2.00 - 3.99	2,080	2.81		2.00 - 2.69	1,880	2.92		2.50 - 3.50	950	3.30		2.50 - 3.50	350	3.09
Private Brand	2.50 - 3.99	1,040	3.37		2.50	350	2.50		2.50	270	2.50		2.50	70	2.50

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)