



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/05 thru 07/11.

Fri. Jul 05, 2013

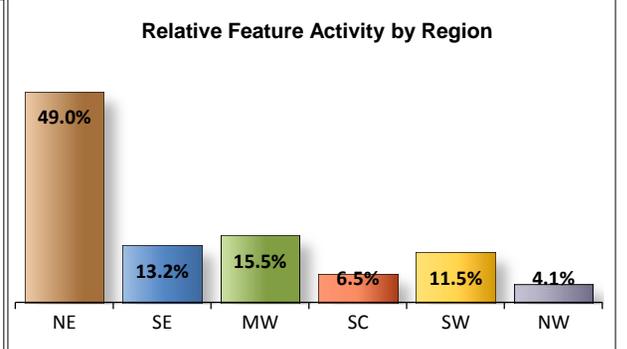
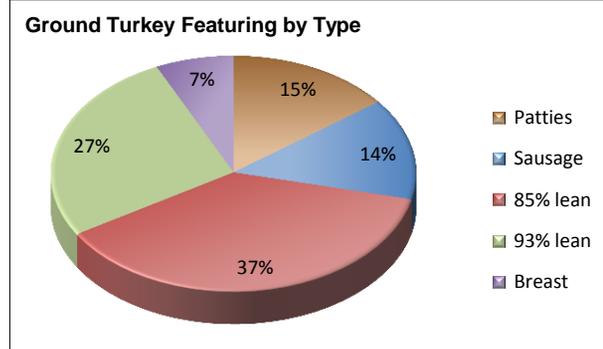
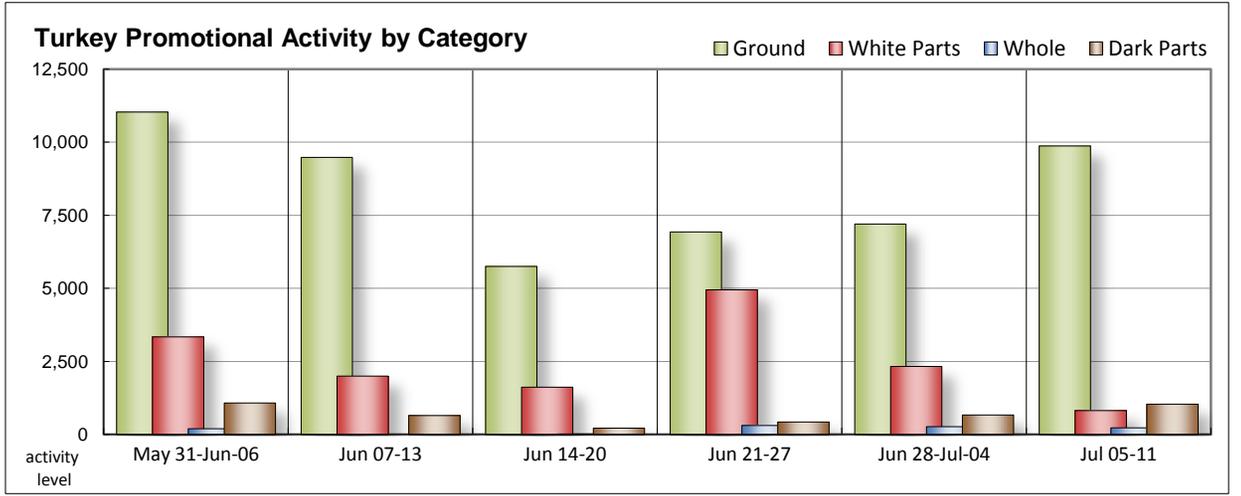
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	40.1% of 23,200 outlets		41.5% of 23,200 outlets		29.6% of 22,500 outlets	
Special Rate ^{4/}	5.3%		9.9%		4.1%	
Activity Index ^{2/}	12,750		12,000		11,890	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	30	1.69				
" - Toms	30	1.69				
Frozen - Hens	170	0.99	140	1.07	160	1.19
" - Toms			130	1.08	160	1.19
PARTS:						
Breast:						
Bone-in, whole						
Fresh			40	2.29		
Frozen	350	1.66	1,530	1.50	380	1.73
Split, bone-in						
Fresh						
Rotisserie			120	7.16	10	8.99
Boneless, whole			10	4.99	10	4.97
Cutlets	370	5.28	430	4.62	570	5.00
Cutlets, thin sliced					20	5.49
Strips					180	4.99
Tenders	100	4.39	200	4.03	240	4.05
Marinated Tenders	400	4.60	240	4.26	350	4.36
Drumsticks	170	1.47	250	1.88	140	1.69
Thighs	100	1.79	40	2.29		
Wings	150	2.36	230	1.91		
Necks	10	1.29	10	1.29	30	0.98
Smoked Drumsticks	210	2.24	70	1.82	210	2.00
Smoked Wings	160	1.81	70	1.82	200	1.83
Smoked Necks	240	1.76			190	1.69
GROUND TURKEY:	9,870	3.27	7,200	3.13	8,120	3.26
Patties	1,450	3.38	970	3.41	760	3.09
Sausage	1,380	3.35	1,520	3.41	3,230	3.23
85% lean	3,710	2.78	1,630	2.66	670	2.39
93% lean	2,640	3.28	2,890	3.12	2,490	3.04
Breast	690	5.40	190	4.01	970	4.61
Rolls (frsh/frz 1 lb.)	140	1.96	590	2.02	230	2.04
Specialty ^{5/}						
Patties	30	4.45	430	5.00	10	3.99
93-94% lean	160	3.95	260	4.04	430	4.18
Breast	60	5.68	10	6.99	250	7.28

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

This Week's Turkey Feature Highlights

Retail feature activity is more active for the Fourth of July holiday and first of the month. Light offerings on whole turkeys centered on a few fresh hens and toms and some frozen hens. Consumers looking for promotions on frozen bone-in breasts will be disappointed; feature activity is slower and prices are higher. There doesn't seem to be any interest in promoting rotisserie breasts this week. The volume of offerings on boneless white parts is unchanged; prices are higher. Dark parts are fully represented in the circulars; smoked parts are the most actively promoted items. Feature activity on ground turkey is the most active it has been since the last holiday weekend. For a change, the 85% lean is the most popular grind; it is also the lowest priced option. Overall deli feature activity slows. Service deli market activity increases; prices are mostly lower on turkey, higher on chicken. Self-service deli offerings decline. Stores increase promotional activity on processor brands and lower the prices; the opposite is true for 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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	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/}	71.9% of 4,600 sampled outlets			37.8% of 6,100 sampled outlets			30.2% of 4,200 sampled outlets		
Special Rate ^{4/}	1.3% of stores w/ no-price promotions			0.1% of stores w/ no-price promotions			5.2% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 6,520			Activity Index = 2,400			Activity Index = 1,880		
	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							1.69	30	1.69
" - Toms							1.69	30	1.69
Frozen - Hens	0.99	170	0.99						
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.79	240	1.70	1.59	10	1.59	1.19 - 1.79	90	1.58
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	4.99 - 5.49	330	5.26						
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.39	50	4.16	4.49	30	4.49			
Marinated Tenders	4.26 - 4.79	310	4.58				4.66	80	4.66
Drumsticks	1.29	130	1.29	2.29	30	2.29	1.29	10	1.29
Thighs							1.79	100	1.79
Wings	1.78 - 2.99	50	2.83	2.29 - 2.99	50	2.52	1.29 - 1.78	20	1.66
Necks							1.29	10	1.29
Smoked Drumsticks	1.99 - 2.29	200	2.26				1.69	10	1.69
Smoked Wings	1.79 - 1.99	150	1.81				1.69	10	1.69
Smoked Necks	1.69 - 1.99	200	1.72	1.99	40	1.99			
GROUND TURKEY:									
Patties	2.98 - 4.49	740	3.26	2.99 - 3.79	440	3.29	3.00 - 3.99	60	3.48
Sausage	2.50 - 3.99	980	3.20				2.39 - 3.99	380	3.74
85% lean	1.99 - 3.33	1,010	2.59	2.33 - 3.07	1,570	2.89	2.40 - 3.19	60	2.94
93% lean	2.99 - 3.99	1,200	3.32	2.99 - 3.50	220	3.29	2.80 - 3.75	730	3.19
Breast (99-100% lean)	4.61 - 5.59	680	5.41						
Rolls (frsh/frz 1 lb.)							1.67 - 2.49	110	1.74
Specialty ^{5/}									
Patties	3.99 - 4.99	20	4.68				3.99	10	3.99
93-94% lean				3.99	10	3.99	3.33 - 3.99	140	3.90
Breast	4.99 - 5.99	60	5.68						



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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/}	19.4% of 4,200 sampled outlets			38.7% of 2,900 sampled outlets			37.0% of 1,200 sampled outlets		
Special Rate ^{4/}	2.2% of stores w/ no-price promotions			18.7% of stores w/ no-price promotions			24.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 790			Activity Index = 1,010			Activity Index = 150		
	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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.59	10	1.59						
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	5.45	30	5.45	5.45	10	5.45			
Cutlets, thin sliced									
Strips									
Tenders	4.79	20	4.79						
Marinated Tenders	4.79	10	4.79						
Drumsticks									
Thighs									
Wings	1.78	30	1.78						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.50	10	3.50	3.99	200	3.99			
Sausage	3.19	10	3.19	3.27	10	3.27			
85% lean	2.49 - 2.92	460	2.89	2.50 - 2.92	570	2.78	2.00 - 2.71	40	2.32
93% lean	2.92 - 3.50	180	3.18	3.19	200	3.19	3.19 - 3.99	110	3.71
Breast (99-100% lean)				4.79	10	4.79	3.99		3.99
Rolls (frsh/frz 1 lb.)	2.79	30	2.79						
Specialty ^{5/}									
Patties									
93-94% lean				4.59	10	4.59			
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/05 thru 07/11.

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	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		88.8% of 4,600 sampled outlets Activity Index = 14,500			81.0% of 6,100 sampled outlets Activity Index = 10,850		
Feature Rate ^{1/}	72.0% of 23,200 stores		77.7% of 23,200 stores		59.2% of 22,500 stores							
Activity Index ^{2/}	45,660		45,720		39,570							
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,280	7.77	3,480	8.35	3,380	8.55	5.98 - 9.99	1,860	7.90	6.99 - 8.99	1,370	7.31
Private Brand	2,670	7.22	2,100	7.44	2,440	7.76	6.49 - 8.99	2,130	7.20	7.49	110	7.49
Category 2												
Processor Brand	5,940	5.68	5,180	5.71	3,620	5.96	4.99 - 6.99	1,580	5.54	4.99 - 6.99	1,480	6.31
Private Brand	1,110	6.34	3,550	6.77	4,530	6.93	5.99 - 6.99	430	6.04	5.99	140	5.99
Category 3												
Processor Brand	1,740	4.16	1,050	3.94	1,560	3.78	3.99 - 4.99	480	4.43	3.99	20	3.99
Private Brand	330	5.07	140	4.95	270	5.23	3.97 - 4.98	130	4.31			
Turkey Ham												
Processor Brand	240	3.90	270	3.56	400	3.08	3.49 - 4.99	150	4.25	4.99	20	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	150	4.65	110	4.23	200	4.49	3.79 - 4.99	110	4.58	4.99	20	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4,980	7.90	3,960	7.32	2,670	7.71	4.99 - 9.99	2,280	8.25	4.99 - 7.99	2,060	7.62
Private Brand	1,350	7.41	1,330	7.19	2,410	7.44	6.99 - 7.99	860	7.57	6.49	60	6.49
Category 2												
Processor Brand	90	5.17	470	5.89	690	5.54	3.99 - 5.99	30	5.44			
Private Brand	60	5.99	20	4.69	470	6.67	5.99	60	5.99			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,680	2.89	9,500	3.01	4,710	3.14	2.00 - 3.98	1,940	2.97	2.50 - 3.59	2,320	3.03
Private Brand	1,570	3.70	2,590	2.96	3,440	2.96	2.50 - 2.99	230	2.86	2.49 - 3.99	430	3.69
Turkey 16 oz												
Processor Brand	580	4.85	320	4.48	940	5.19	4.49 - 5.29	180	4.67	4.99 - 5.00	210	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	9,380	2.90	9,060	3.03	4,510	3.16	2.00 - 3.98	1,880	2.98	2.50 - 3.59	2,180	3.04
Private Brand	1,510	3.74	2,590	2.96	3,330	2.96	2.99	170	2.99	2.49 - 3.99	430	3.69

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)		
	74.9% of 4,200 sampled outlets			63.6% of 4,200 sampled outlets			46.1% of 2,900 sampled outlets			44.4% of 1,200 sampled outlets		
	Activity Index = 9,200			Activity Index = 6,180			Activity Index = 3,620			Activity Index = 1,310		
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 - 9.99	500	7.87	6.99 - 9.49	270	8.26	7.99 - 10.99	30	9.14	6.99 - 12.99	250	8.47
Private Brand	5.99 - 8.99	360	7.20	6.99 - 7.99	70	7.32						
Category 2												
Processor Brand	4.44 - 6.99	2,020	5.38	4.99 - 6.99	430	5.93	4.99 - 5.99	410	5.17	5.98	20	5.98
Private Brand	5.98 - 6.49	210	6.24	5.99 - 7.49	260	6.81				7.49	70	7.49
Category 3												
Processor Brand	3.29 - 4.49	270	3.91	3.49 - 4.49	380	4.26	3.99	590	3.99			
Private Brand	5.99	70	5.99	3.69 - 5.49	130	5.32						
Turkey Ham												
Processor Brand							2.69 - 3.29	70	2.84			
Private Brand												
Turkey Pastrami												
Processor Brand	3.58 - 5.99	20	4.73									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.95 - 9.99	500	7.65	6.99 - 8.99	140	7.40				7.49	70	7.49
Private Brand	6.49 - 8.99	230	6.84	5.99 - 7.99	130	7.75						
Category 2												
Processor Brand	4.49 - 5.99	60	5.03									
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.50	2,080	2.73	2.39 - 2.99	2,000	2.82	2.50 - 3.00	890	2.75	2.50 - 3.50	450	3.17
Private Brand	2.79 - 3.99	380	3.95	2.49 - 3.99	160	3.62	3.99	370	3.99			
Turkey 16 oz												
Processor Brand	3.99 - 4.99	60	4.86	3.99 - 5.49	130	4.85						
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.50	2,060	2.73	2.39 - 3.00	1,920	2.83	2.50 - 3.00	890	2.75	2.50 - 3.50	450	3.17
Private Brand	2.79 - 3.99	380	3.95	2.49 - 3.99	160	3.62	3.99	370	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)