



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/23 thru 08/29.

Fri. Aug 23, 2013

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

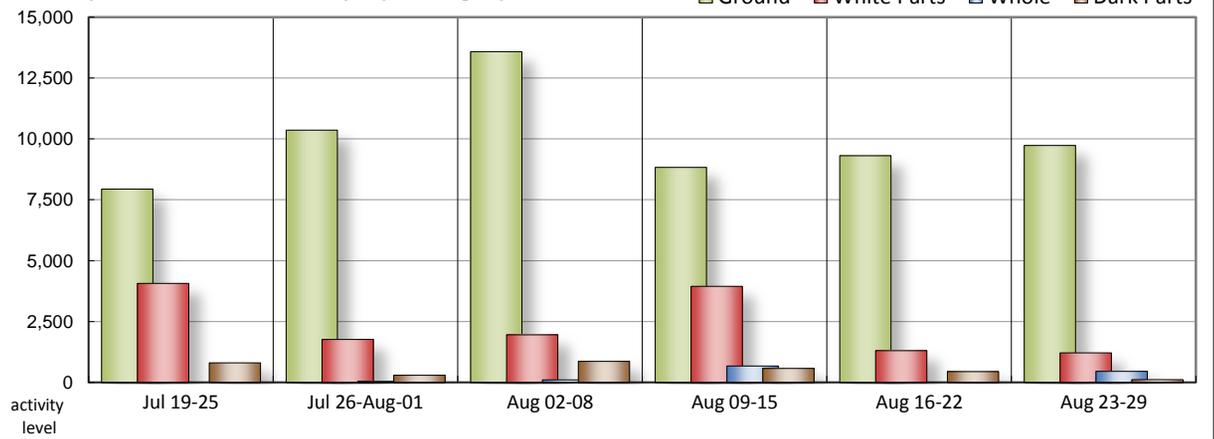
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	30.3% of 23,200 outlets		36.8% of 23,200 outlets		33.9% of 22,500 outlets	
Special Rate ^{4/}	2.9%		0.4%		5.8%	
Activity Index ^{2/}	13,730		13,200		10,760	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					60	1.79
" - Toms						
Frozen - Hens	260	1.40			10	1.49
" - Toms	200	1.47			10	1.69
PARTS:						
Breast:						
Bone-in, whole						
Fresh	370	2.68			30	2.62
Frozen	80	1.62	320	1.83	100	1.70
Split, bone-in						
Fresh	170	2.99	10	3.49	20	2.99
Rotisserie	220	8.67	180	7.79	260	8.72
Boneless, whole			40	4.74	30	5.16
Cutlets	210	4.56	490	5.20	520	5.01
Cutlets, thin sliced	130	4.99			120	4.82
Strips	20	3.99			190	4.88
Tenders	20	3.99	270	4.20	150	4.86
Marinated Tenders	840	4.43	870	4.37	590	4.08
Drumsticks	10	1.39	30	2.22	220	1.94
Thighs			20	2.99	190	2.03
Wings	20	1.94	50	2.17	190	1.97
Necks			10	1.69		
Smoked Drumsticks	30	1.99	180	1.99	10	1.95
Smoked Wings	30	1.99	160	1.99	10	1.95
Smoked Necks	30	1.76			10	1.58
GROUND TURKEY:	9,730	3.29	9,310	3.31	7,190	3.44
Patties	1,380	3.50	490	3.78	810	3.21
Sausage	2,370	3.41	1,730	3.28	1,160	3.04
85% lean	2,540	2.80	1,230	2.64	1,110	2.62
93% lean	2,780	3.29	4,680	3.19	2,210	3.04
Breast	660	4.43	1,180	4.44	1,900	4.66
Rolls (frsh/frz 1 lb.)	600	2.55	340	2.81	370	1.93
Specialty ^{5/}						
Patties	60	4.03	40	5.99	180	5.00
93-94% lean	640	3.78	820	3.58	260	4.40
Breast	60	6.08	60	5.80	40	5.99

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

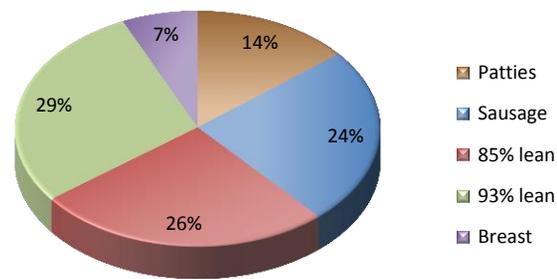
This Week's Turkey Feature Highlights

Retail feature activity increases going into the end of the month and the start of the Labor Day Weekend; more stores are running "no price" specials this week. There are actually frozen hens and toms in this week's circulars! Kosher turkeys are also appearing in advance of Rosh Hashanah. Fresh whole bone-in breasts are back in the ads, replacing most of the promotions on frozen bone-in breasts. Offerings also increase on fresh split bone-in breasts, giving consumers more choices for bone-in breasts. Feature activity improves on rotisserie breast; prices are higher. Promotional activity on boneless white parts continues to focus on marinated tenders. Shoppers looking for deals on dark parts will have a hard time finding any promotions this week. Feature activity increases on ground turkey, with sharp increases in the number of ads promoting patties, 85% lean and sausage. There are fewer ads for deli items, mostly due to a large drop in self-service featuring. Service deli private brands are given more ad space; prices are lower on thick and thin slicing turkey and on chicken. Self-service deli prices are lower.

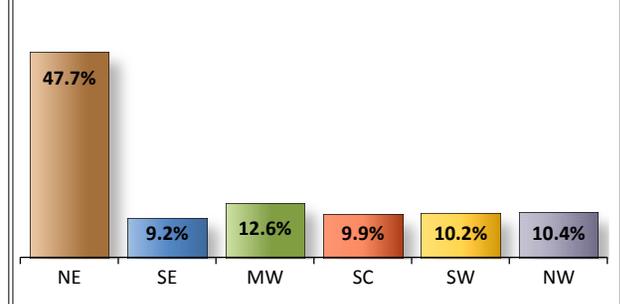
Turkey Promotional Activity by Category



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)		
Feature Rate ^{1/}	60.2% of 4,600 sampled outlets			14.2% of 6,100 sampled outlets			34.7% of 4,200 sampled outlets		
Special Rate ^{4/}	0.5% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			11.4% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,260			Activity Index = 1,910			Activity Index = 1,740		
	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 - 1.59	240	1.41	1.19	20	1.19			
" - Toms	1.19 - 1.59	180	1.50	1.19	20	1.19			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.29 - 2.99	280	2.75	2.49	20	2.49	2.49	70	2.49
Frozen				1.78	10	1.78	1.49 - 1.79	20	1.62
Split, bone-in									
Fresh	2.99	170	2.99						
Rotisserie	6.89 - 9.99	70	7.99						
Boneless, whole									
Cutlets	4.99	120	4.99						
Cutlets, thin sliced	4.99	130	4.99						
Strips									
Tenders									
Marinated Tenders	4.26 - 5.33	730	4.47	4.26	40	4.26			
Drumsticks							1.39	10	1.39
Thighs									
Wings	2.49	10	2.49						
Necks									
Smoked Drumsticks	1.99	20	1.99						
Smoked Wings	1.99	20	1.99						
Smoked Necks	1.99	20	1.99				1.29	10	1.29
GROUND TURKEY:									
Patties	2.99 - 3.99	910	3.33				2.99 - 3.79	90	3.20
Sausage	2.49 - 4.49	1,680	3.52	3.50 - 3.79	80	3.75	2.78 - 3.49	270	2.97
85% lean	2.16 - 3.07	990	2.80	2.50 - 2.99	250	2.62	1.99 - 2.99	620	2.56
93% lean	2.99 - 3.99	970	3.52	3.00 - 3.49	1,110	3.02	2.62 - 3.43	270	3.11
Breast (99-100% lean)							3.99 - 4.79	330	4.36
Rolls (frsh/frz 1 lb.)	3.50	10	3.50	1.99 - 3.50	360	3.02	2.00	20	2.00
Specialty ^{5/}									
Patties	3.79 - 4.49	40	4.29				3.50	20	3.50
93-94% lean	3.49 - 4.99	620	3.78				3.69	10	3.69
Breast	5.99 - 6.99	50	6.20						



USDA Weekly Retail Turkey Feature Activity
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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/}	19.3% of 4,200 sampled outlets			29.3% of 2,900 sampled outlets			20.7% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			5.7% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,370			Activity Index = 1,020			Activity Index = 430		
	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	50	1.59						
Split, bone-in									
Fresh									
Rotisserie	8.99	80	8.99	8.99	70	8.99			
Boneless, whole									
Cutlets	3.99	20	3.99	3.99	70	3.99			
Cutlets, thin sliced									
Strips	3.99	20	3.99						
Tenders	3.99	20	3.99						
Marinated Tenders	4.39	30	4.39				3.99	40	3.99
Drumsticks									
Thighs									
Wings	1.39	10	1.39						
Necks									
Smoked Drumsticks				1.99	10	1.99			
Smoked Wings				1.99	10	1.99			
Smoked Necks									
GROUND TURKEY:									
Patties	3.49	10	3.49	3.99	370	3.99			
Sausage	2.39 - 3.49	310	3.05	5.49	10	5.49	3.27	20	3.27
85% lean	1.99 - 2.79	310	2.83	3.33	370	3.33			
93% lean	3.19 - 3.59	170	3.48	3.99	10	3.99	3.19 - 4.79	250	3.62
Breast (99-100% lean)	4.16 - 4.39	130	4.26	3.99 - 5.59	100	4.56	4.39 - 4.79	100	4.72
Rolls (frsh/frz 1 lb.)	0.98 - 2.79	210	1.74						
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

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/23 thru 08/29.

(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		94.7% of 4,600 sampled outlets Activity Index = 15,360			87.8% of 6,100 sampled outlets Activity Index = 10,660		
Feature Rate ^{1/}	82.9% of 23,200 stores		79.9% of 23,200 stores		75.1% of 22,500 stores							
Activity Index ^{2/}	49,050		54,090		45,940							
	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	3,720	7.83	7,410	7.93	3,900	7.88	5.57 - 10.49	2,620	7.90	6.98 - 8.99	660	7.62
Private Brand	2,360	7.79	590	8.21	3,010	7.75	6.99 - 8.99	1,730	7.89	7.49	70	7.49
Category 2												
Processor Brand	4,650	5.83	3,910	5.87	3,840	5.84	4.99 - 6.99	1,680	6.05	4.99 - 6.99	580	6.01
Private Brand	3,990	6.39	3,570	6.63	3,900	6.48	4.99 - 7.99	940	5.99	4.99 - 6.99	790	6.25
Category 3												
Processor Brand	750	4.41	1,090	4.07	990	4.09	3.98 - 4.99	160	4.57	3.98 - 4.50	350	4.08
Private Brand	1,460	5.00	210	4.19	1,380	4.80	4.99 - 5.48	160	5.12	4.99	1,150	4.99
Turkey Ham												
Processor Brand	370	3.28	210	2.86	300	3.63	2.98 - 4.99	150	4.00	2.99	20	2.99
Private Brand			40	4.48								
Turkey Pastrami												
Processor Brand	240	4.21	60	5.30	90	4.31	3.99 - 4.98	170	4.03			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,570	7.76	2,780	7.36	3,540	7.35	5.99 - 9.49	1,380	8.09	6.49 - 7.99	1,700	7.65
Private Brand	510	7.68	1,040	7.21	2,970	6.90	5.99 - 7.99	370	7.71	6.78	10	6.78
Category 2												
Processor Brand	110	4.96	980	5.01	140	5.09						
Private Brand	1,690	5.11	520	6.16	720	5.41	4.99	110	4.99	4.99	1,150	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	12,310	2.88	12,410	3.05	8,150	2.97	2.49 - 3.99	2,630	3.21	2.49 - 3.79	1,910	2.88
Private Brand	320	2.64	1,950	3.06	2,010	2.82	2.50 - 3.50	170	2.62	2.69	50	2.69
Turkey 16 oz												
Processor Brand	1,210	5.18	4,080	5.44	1,790	5.07	3.49 - 6.49	470	4.98	4.99 - 6.49	260	5.10
Private Brand												
Chicken 7-10 oz												
Processor Brand	11,520	2.86	11,290	3.05	7,420	2.96	2.49 - 3.99	2,450	3.21	2.49 - 3.79	1,910	2.83
Private Brand	270	2.66	1,950	3.06	1,790	2.81	2.50 - 3.50	170	2.62	2.69	50	2.69

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)				
	85.6% of 4,200 sampled outlets				70.2% of 4,200 sampled outlets				71.8% of 2,900 sampled outlets			74.3% of 1,200 sampled outlets				
	Activity Index = 9,290				Activity Index = 7,680				Activity Index = 4,140			Activity Index = 1,920				
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	6.49	- 9.99	290	7.35	5.99	- 6.99	80	6.72	8.99	10	8.99	6.99	- 12.99	60	10.42	
Private Brand	6.99	- 10.99	200	8.49	6.99	360	6.99									
Category 2																
Processor Brand	4.95	- 6.99	740	5.63	4.99	- 5.99	1,160	5.52	4.99	- 5.99	360	5.86	4.99	- 6.48	130	6.19
Private Brand	4.99	- 6.99	1,100	6.25	4.99	- 6.49	750	6.73	6.99	- 7.99	260	7.14	7.49	- 7.99	150	7.54
Category 3																
Processor Brand	3.98	- 4.99	220	4.81	4.50	20	4.50									
Private Brand	4.49	- 4.99	20	4.80					4.99	130	4.99					
Turkey Ham																
Processor Brand	3.49	- 3.59	30	3.53	2.49	- 3.19	150	2.56	2.49	- 3.29	20	3.10				
Private Brand																
Turkey Pastrami																
Processor Brand	3.49	- 4.59	50	3.94	6.49	20	6.49									
Private Brand																
SERVICE DELI - Chicken																
Category 1																
Processor Brand	5.49	- 7.99	270	7.17	5.99	- 9.49	180	7.29	6.99	- 7.99	20	7.45	6.99	20	6.99	
Private Brand	6.99	- 9.99	50	8.77	6.99	80	6.99									
Category 2																
Processor Brand	4.49	- 4.99	110	4.96												
Private Brand	4.99	- 5.99	390	5.52	4.99	40	4.99									
SELF-SERVICE DELI (dollars per tub or pouch)																
Turkey 7-10 oz																
Processor Brand	2.49	- 3.50	2,820	2.75	2.49	- 2.79	2,590	2.79	2.49	- 3.00	1,580	2.72	2.49	- 3.50	780	2.84
Private Brand	2.50	- 3.00	70	2.73	2.50	30	2.50									
Turkey 16 oz																
Processor Brand	4.99		70	4.99	4.99	- 6.49	230	5.89	4.99	180	4.99					
Private Brand																
Chicken 7-10 oz																
Processor Brand	2.49	- 3.50	2,810	2.75	2.49	- 3.00	1,990	2.75	2.49	- 3.00	1,580	2.72	2.49	- 3.50	780	2.84
Private Brand	2.50	- 3.00	50	2.80												

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)