



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/14 thru 02/20.

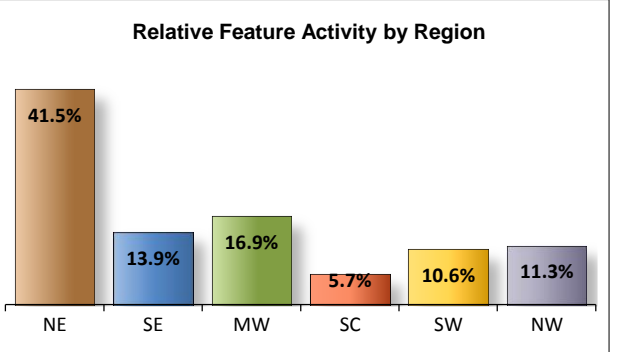
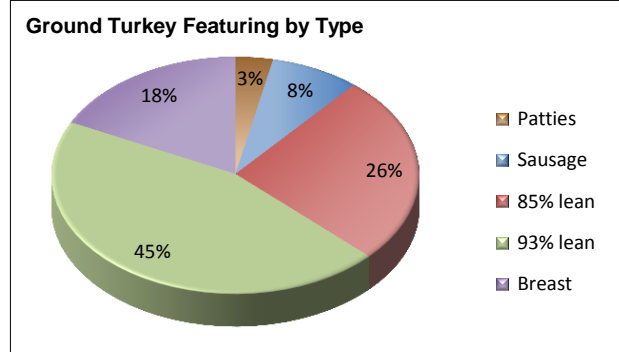
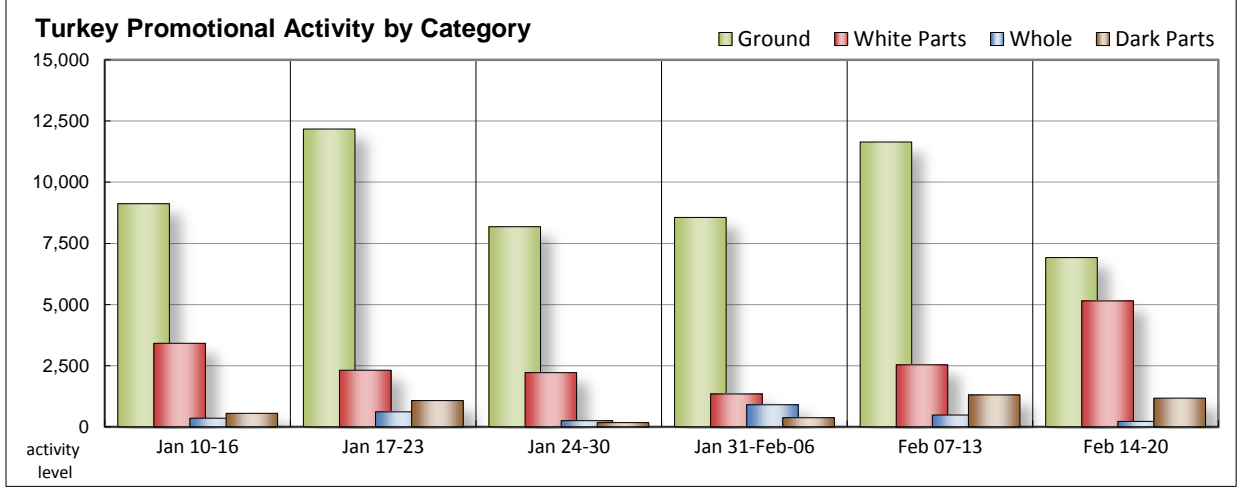
Fri. Feb 14, 2014

(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/}	42.3% of 22,900 outlets		50.3% of 22,900 outlets		45.0% of 23,200 outlets	
Special Rate ^{4/}	3.1%		9.7%		1.4%	
Activity Index ^{2/}	13,610		17,080		14,880	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	120	1.14	330	1.01	220	1.11
" - Toms	110	1.15	160	1.03	60	1.42
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.84	20	2.84	720	1.99
Frozen	1,200	1.66	730	1.80	510	2.06
Split, bone-in						
Fresh	10	2.49	70	2.94		
Rotisserie	340	8.75	430	7.94	480	7.90
Boneless, whole	10	3.99	260	5.90	10	3.99
Cutlets	1,270	5.01	590	5.13	480	5.21
Cutlets, thin sliced			90	4.99	100	4.99
Strips						
Tenders	140	4.93	350	5.16	350	4.93
Marinated Tenders	2,160	4.71	270	3.87	230	4.63
Drumsticks	290	1.81	420	1.90	80	1.62
Thighs	20	2.34	140	2.26	30	1.79
Wings	230	2.21	460	1.87	40	1.82
Necks	30	1.36	40	1.57		
Smoked Drumsticks	210	2.39	70	2.28	310	1.99
Smoked Wings	200	2.07	90	2.05	220	1.84
Smoked Necks	200	2.07	90	1.96	310	1.85
GROUND TURKEY:	6,920	3.26	11,640	3.15	10,570	3.40
Patties	230	3.43	440	3.70	1,030	3.43
Sausage	550	3.27	1,600	3.44	820	3.31
85% lean	1,790	2.55	2,960	2.60	2,240	2.71
93% lean	3,120	3.22	5,980	3.21	4,600	3.23
Breast	1,230	4.48	660	4.28	1,880	4.75
Rolls (frsh/frz 1 lb.)	10	1.50	160	1.39	60	1.49
Specialty ^{5/}						
Patties						
93-94% lean	120	3.48	570	4.01	90	3.92
Breast			100	6.16	10	6.99

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

This Week's Turkey Feature Highlights
 Feature activity slows as stores focus more on Valentine's Day promotions and less on turkey. A few stores offer frozen hens and toms, who turkeys will get their turn as we get closer to Easter and Passover. Featuring increases on frozen bone-in breasts; prices decline. Rotisserie breasts are less visible in this week's circulars; prices are higher. Offerings increase on cutlets and marinated tenders; both are heavily featured. Prices trend lower on cutlets, higher on marinated tenders. Dark parts are fully represented in this week's ads; offerings slow on fresh parts, increase on smoked parts. There is a sharp decline in ground turkey promotions. The weighted average price increases due to the larger percent of features on ground breast this week. Feature activity increases on service deli items, decreases on self-service items with overall deli activity being only slightly higher than last week. Retailers gave more ad space to 16 ounce self-service deli.



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)		
Special Rate ^{4/} Activity Index ^{2/}	61.1% of 4,700 sampled outlets 2.2% of stores w/ no-price promotions Activity Index = 6,200			49.3% of 5,900 sampled outlets 0.7% of stores w/ no-price promotions Activity Index = 2,830			39.0% of 4,200 sampled outlets 8.8% of stores w/ no-price promotions Activity Index = 2,300		
	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	30	1.19	1.29	10	1.29
" - Toms				1.19	30	1.19	1.29	10	1.29
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49 - 2.99	20	2.84						
Frozen	1.19 - 1.88	450	1.72	1.00 - 1.68	90	1.47	1.29 - 1.99	280	1.78
Split, bone-in									
Fresh	2.49	10	2.49						
Rotisserie	7.99	20	7.99				6.98	10	6.98
Boneless, whole	3.99	10	3.99						
Cutlets	3.99 - 5.99	780	5.03	4.99	430	4.99	4.48	10	4.48
Cutlets, thin sliced									
Strips									
Tenders				4.99	120	4.99	4.48	10	4.48
Marinated Tenders	3.46 - 5.33	910	4.22	4.66 - 5.33	1,090	5.28	3.19 - 5.33	130	3.38
Drumsticks	1.69 - 2.49	170	1.79				1.29 - 1.99	120	1.84
Thighs	1.99 - 2.49	20	2.34						
Wings	1.99 - 2.99	80	2.66	1.39 - 2.99	30	2.44	1.29 - 1.99	120	1.84
Necks							1.29 - 1.49	30	1.36
Smoked Drumsticks	1.99 - 2.49	160	2.43	2.39	40	2.39	1.69	10	1.69
Smoked Wings	1.99	160	1.99	2.39	40	2.39			
Smoked Necks	1.99	160	1.99	2.39	40	2.39			
GROUND TURKEY:									
Patties	3.49	10	3.49	3.00	30	3.00	3.50	180	3.50
Sausage	3.19 - 3.99	360	3.42	3.00 - 3.50	40	3.30	2.50 - 3.29	130	2.59
85% lean	2.16 - 3.07	1,100	2.71	2.19 - 2.50	220	2.48	1.99 - 2.99	200	2.35
93% lean	2.90 - 3.99	970	3.29	2.90 - 3.29	420	2.95	2.99 - 3.33	930	3.08
Breast (99-100% lean)	4.61 - 5.38	700	4.72	3.84 - 4.61	180	4.10	3.99	120	3.99
Rolls (frsh/frz 1 lb.)									
Specialty ^{5/}									
Patties									
93-94% lean	2.99 - 4.99	110	3.38						
Breast									



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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/}	20.0% of 4,200 sampled outlets			36.1% of 2,800 sampled outlets			36.2% of 1,200 sampled outlets		
Special Rate ^{4/}	5.0% 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 = 780			Activity Index = 1,040			Activity Index = 460		
	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	1.09 - 1.19	70	1.12	0.99	10	0.99			
" - Toms	1.09 - 1.19	70	1.12						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.19 - 1.69	280	1.40				1.88 - 1.99	100	1.98
Split, bone-in									
Fresh									
Rotisserie	7.99	40	7.99	8.99	270	8.99			
Boneless, whole									
Cutlets	4.99	50	4.99						
Cutlets, thin sliced									
Strips									
Tenders	4.69	10	4.69						
Marinated Tenders	4.99	10	4.99				3.99	20	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.49	10	3.49			
Sausage				4.79	20	4.79			
85% lean	1.99 - 2.91	30	2.31	1.99 - 2.79	190	2.05	2.00 - 2.33	50	2.25
93% lean	2.66 - 3.24	160	3.07	3.19 - 3.99	500	3.41	3.19 - 3.99	140	3.84
Breast (99-100% lean)	4.39	50	4.39	5.35	30	5.35	3.99 - 4.39	150	4.04
Rolls (frsh/frz 1 lb.)	1.50	10	1.50						
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 02/14 thru 02/20.

(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		84.6% of 4,700 sampled outlets Activity Index = 14,550			80.3% of 5,900 sampled outlets Activity Index = 10,340		
Feature Rate ^{1/}	76.7% of 22,900 stores		76.6% of 22,900 stores		66.0% of 23,200 stores							
Activity Index ^{2/}	50,600		50,120		40,910							
	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	6,950	7.98	3,830	7.40	5,460	7.77	5.98 - 9.99	3,220	8.16	6.99 - 9.99	1,320	8.34
Private Brand	780	7.37	2,710	7.35	1,380	7.56	6.99 - 9.99	590	7.30			
Category 2												
Processor Brand	5,010	5.69	3,460	5.87	4,770	5.86	4.98 - 6.99	990	5.72	4.99 - 5.99	860	5.85
Private Brand	5,010	6.38	5,190	6.72	3,590	6.71	4.99 - 6.99	2,910	6.31	5.99 - 6.99	290	6.42
Category 3												
Processor Brand	960	3.99	1,490	4.04	690	4.25	3.99 - 4.99	620	4.12	3.99	40	3.99
Private Brand	60	4.82	90	5.33	220	4.91	4.98	50	4.98			
Turkey Ham												
Processor Brand	160	3.57	530	4.14	520	4.03	3.98 - 3.99	40	3.99			
Private Brand												
Turkey Pastrami												
Processor Brand	290	4.16	350	4.54	460	3.88	3.99 - 4.49	230	4.05			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,270	7.91	3,500	7.80	3,590	7.91	5.99 - 9.99	650	8.10	5.99 - 7.99	730	7.85
Private Brand	2,190	7.90	850	7.23	2,360	7.64	6.99 - 7.99	1,210	7.91			
Category 2												
Processor Brand	260	5.99	160	5.26	640	5.20	5.99	20	5.99			
Private Brand	360	5.38	260	5.99	170	5.99	4.99	220	4.99			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,680	2.85	9,170	2.99	4,670	3.12	2.37 - 4.99	1,550	3.18	2.50 - 3.49	2,100	2.93
Private Brand	2,010	2.59	3,300	2.60	2,270	3.18	3.00	10	3.00	2.50 - 3.00	260	2.93
Turkey 16 oz												
Processor Brand	4,680	4.79	1,820	5.07	3,670	4.99	3.99 - 5.99	840	4.95	3.99 - 5.99	2,410	5.06
Private Brand			1,290	4.40								
Chicken 7-10 oz												
Processor Brand	8,140	2.85	8,890	3.00	4,400	3.11	2.50 - 3.99	1,390	3.26	2.50 - 3.49	2,080	2.93
Private Brand	1,790	2.67	3,230	2.59	2,050	3.17	3.00	10	3.00	2.69 - 3.00	250	2.94

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)		
	77.6% of 4,200 sampled outlets			70.3% of 4,200 sampled outlets			61.5% of 2,800 sampled outlets			81.3% of 1,200 sampled outlets		
	Activity Index = 11,340			Activity Index = 8,720			Activity Index = 3,660			Activity Index = 1,990		
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	710	7.99	6.49 - 7.99	670	7.45	6.49 - 10.99	620	7.38	5.99 - 7.99	410	7.15
Private Brand	7.49 - 7.99	110	7.77	6.99 - 7.49	80	7.34						
Category 2												
Processor Brand	4.69 - 6.99	1,320	6.04	4.99 - 6.99	1,120	5.51	4.49 - 4.99	600	4.97	4.49 - 6.99	120	5.58
Private Brand	4.99 - 6.99	1,090	6.10	5.99 - 7.99	520	6.87				7.49 - 7.99	200	7.66
Category 3												
Processor Brand	2.99 - 4.88	140	3.83	2.99 - 3.99	120	3.85	2.99	40	2.99			
Private Brand	3.99	10	3.99									
Turkey Ham												
Processor Brand	3.49 - 3.98	30	3.62				2.99 - 3.99	90	3.37			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49 - 7.99	60	4.58									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.99	690	7.77	5.99 - 8.99	680	7.61	6.99 - 9.99	440	8.79	5.99	80	5.99
Private Brand	6.99 - 10.99	160	7.43	7.99	600	7.99				7.99	220	7.99
Category 2												
Processor Brand	5.99	240	5.99									
Private Brand	5.98 - 5.99	140	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98 - 3.79	2,890	2.68	1.88 - 2.52	1,470	2.70	2.52 - 2.99	430	2.85	2.49 - 3.49	240	2.80
Private Brand	1.88 - 3.78	540	2.51	2.50 - 3.33	830	2.56	2.50	290	2.50	2.50	80	2.50
Turkey 16 oz												
Processor Brand	3.99 - 5.69	210	5.01	3.69 - 3.99	460	3.96	3.99 - 4.99	430	4.32	3.99	330	3.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.98 - 3.79	2,630	2.66	1.88 - 2.52	1,380	2.68	2.52 - 2.99	430	2.85	2.49 - 3.49	230	2.79
Private Brand	2.50 - 3.78	370	2.80	2.50 - 3.33	790	2.59	2.50	290	2.50	2.50	80	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)