

# **USDA Weekly Retail Turkey Feature Activity**

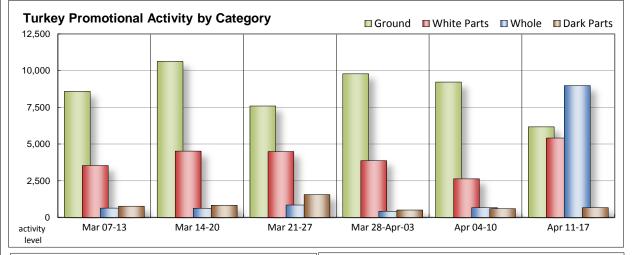
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/11 thru 04/17.

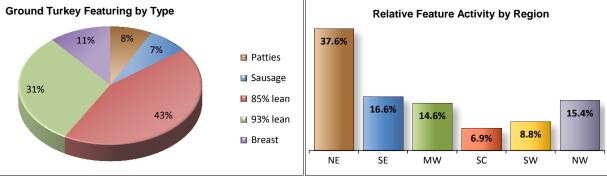
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	LAST	YEAR									
.,		WEEK of 22,900		WEEK of 22,900	38.8% of 23,200 outlets 4.5%						
Feature Rate 1/		tlets		tlets							
Special Rate 4/		3%		.2%							
Activity Index 2/		,270		,580	12,830						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores Wtd Avg						
WHOLE BIRDS:											
Fresh - Hens	1,900	1.53									
" - Toms	1,870	1.53									
Frozen - Hens	2,560	1.12	420	1.21	80	0.55					
" - Toms	2,650	1.13	250	1.06	30	1.49					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	410		20		250	2.96					
Frozen	3,920	1.69	940	1.56	370	1.73					
Split, bone-in											
Fresh	10	2.49									
Rotisserie	340		50		430	8.36					
Boneless, whole	110		140		10	4.99					
Cutlets	140	5.02	440		440	5.03					
Cutlets, thin sliced	230	4.99	310	4.98							
Strips											
Tenders	130	3.83	60	4.85	120	3.92					
Marinated Tenders	120	4.35	670	3.99	70	4.19					
Drumsticks	110	2.21	230	1.82	170	1.68					
Thighs	70		20	2.29	10	1.99					
Wings	130	2.56	30		160	1.69					
Necks			10	1.69	60	1.71					
Smoked Drumsticks	210	1.99	150	1.99	160	2.08					
Smoked Wings	150	1.99	150		180	2.07					
Smoked Necks			10		70	1.91					
GROUND TURKEY:	6,170	3.23	9,220		8,590	3.43					
Patties	460		770		750	3.70					
Sausage	450		1,150		1,010	3.45					
85% lean	2,680		2,690		2,190	2.63					
93% lean	1,900	3.32	4,080		3,210	3.33					
Breast	680	4.66	530		1,430	4.66					
Rolls (frsh/frz 1 lb.)	490	2.76	200	1.93	490	2.43					
Specialty <sup>5/</sup>	4.0	4.00			200	4.00					
Patties	10		4.000	4.40	300	4.83					
93-94% lean	180		1,000		810	4.04					
Breast Note: rolls & specialty no	1,360	5.99	260		30	5.82					
Trote. Tolls & specially 110	n included	i iii giouilu	turney tole	ai ailu welgi	neu avela	ye.					

This Week's Turkey Feature Highlights

Retail feature activity increases heading into the Easter and Passover holiday period. Offerings on fresh and frozen hens and toms surge as ads breaking late in the cycle start to focus more on holiday promotions. Feature activity is sharply higher on fresh and frozen, mostly frozen bone-in breasts. Kosher turkeys are also finding more space in this week's circulars. Featuring increases on rotisserie breasts; prices are higher. Fewer stores feature boneless white parts; tenders are the best value this week. Offerings increase on fresh and smoked dark parts; prices are mixed on fresh, unchanged on smoked. Featuring is sharply lower on grinds as more attention is going towards holiday items. This week the 85% lean is the most actively featured ground item. Specialty ground breast is actively promoted. Deli activity declines; the increase in service deli offerings cannot make up the difference for the drop in self-service deli featuring. Stores increase offerings on private label thin slicing turkey and private label thick slicing chicken.





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 <u>any</u> 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.

Fri. Apr 11, 2014

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/11 thru 04/17.

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

	NORTH	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S.					
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,V	VV)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 43.9% of 4,200 sampled outlets					
	61.7% of 4,70	0 sampled outle	ts	57.5% of 5,9	00 sampled outle	ets						
Special Rate 4/	4.2% of stores w	•	•					0.9% of stores w/ no-price promotions				
Activity Index 2/		Index = 9,740			/ Index = 5,870		Activity Index = 3,440					
Activity index	Price Range	Summar	V	Price Range	Summa	rv/	Price Range Summary					
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Vtd Avg	(\$/pound)	Stores Wtd Avg				
	(φ/ροαιια)	Cto.cc .		(φ/ροαιια)	0.0.00	a,g	(ψ/ροαα)	0.0.00				
WHOLE BIRDS:												
Fresh - Hens	1.29 - 1.99	1,550	1.56	0.79 - 1.59	210	1.03	1.69 - 1.99	100	1.90			
" - Toms	1.29 - 1.99	1,520	1.57	0.79 - 1.59	210	1.03	1.69 - 1.99	100	1.91			
Frozen - Hens	0.88 - 1.69	800	1.01	0.69 - 1.09	1,220	1.08	0.99 - 1.99	360	1.48			
" - Toms	0.88 - 1.39	770	0.99	0.69 - 1.49	1,340	1.11	0.99 - 1.99	360	1.49			
PARTS:		-			,							
Breast:												
Bone-in, whole												
Fresh	2.49 - 3.99	390	3.54	1.48	10	1.48						
Frozen	1.29 - 1.99	400	1.55	0.95 - 1.97	2,120	1.71	0.95 - 1.99	890	1.72			
Split, bone-in					, -							
Fresh	2.49	10	2.49									
Rotisserie	7.99 - 8.99	310	8.81				7.99	20	7.99			
Boneless, whole	4.97 - 5.99	90	5.78									
Cutlets	4.99 - 6.35	40	5.18				4.48 - 4.99	100	4.96			
Cutlets, thin sliced	4.99	140	4.99				4.99	90	4.99			
,	4.99	140	4.99				4.99	90	4.99			
Strips	2.00	50	2.00				2.40 5.45	00	0.75			
Tenders	3.92 - 3.99	50	3.96				3.49 - 5.45	80	3.75			
Marinated Tenders	3.72 - 4.79	80	4.20				5.33 1.59 - 1.99	20	5.33			
Drumsticks								10	1.77			
Thighs	0.00	40	0.00	0.00	00	0.00	1.99	10	1.99			
Wings	2.99	40	2.99	2.99	20	2.99	1.59	10	1.59			
Necks												
Smoked Drumsticks	1.99	210	1.99									
Smoked Wings	1.99	150	1.99									
Smoked Necks												
GROUND TURKEY:	0.00 0.00	000	0.04	0.40	40	0.40	0.40 0.00	60	0.00			
Patties	2.99 - 3.99	320	3.91	3.49	10	3.49	3.49 - 3.99	60	3.86			
Sausage	2.39 - 4.29	250	3.63	3.49	20	3.49	3.19 - 3.99	80	3.41			
85% lean	2.48 - 3.50	1,520	2.80	2.49 - 3.50	420	2.64	1.99 - 3.30	290	2.88			
93% lean	2.98 - 3.99	920	3.35	2.91 - 3.99	230	3.32	2.80 - 3.49	200	3.11			
Breast (99-100% lean)	4.79	40	4.79	0.00		0.00	4.79 - 4.99	180	4.81			
Rolls (frsh/frz 1 lb.)	3.33	40	3.33	3.33	20	3.33	1.99 - 2.99	320	2.66			
Specialty 5/												
Patties	4.00						0.70					
93-94% lean	4.99 - 5.49	20	5.30	5.00	40	<b>5.00</b>	3.79 - 3.99	150	3.97			
Breast USDA Agricultural	5.99	80	5.99	5.99	40	5.99	5.99	10	5.99			

Fri. Apr 11, 2014

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/11 thru 04/17.

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

	SOUTH (	CENTRAL U.S.			SOUT	HWEST U.S.		NORTHWEST U.S.			
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)		(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY)			
Feature Rate <sup>1/</sup> Special Rate <sup>4/</sup> Activity Index <sup>2/</sup>	0.0% of stores w	00 sampled outle // no-price promo Index = 1,620	tions	0.0%	of stores v	00 sampled outlo // no-price prom Index = 1,510	otions	42.1% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,090			
	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								1.69 - 1.97 1.69 - 1.97	40 40	1.85 1.85	
Frozen - Hens " - Toms	0.99 - 1.19 0.99 - 1.19	160 160	1.13 1.13		1.69 1.69	20 20	1.69 1.69				
PARTS: Breast: Bone-in, whole Fresh Frozen Split, bone-in Fresh	0.97 - 1.77	430	1.68		0.95	10	0.95	2.99 1.79	10 70	2.99 1.79	
Rotisserie Boneless, whole Cutlets	9.99 3.99	10 20	9.99 3.99								
Cutlets, thin sliced Strips Tenders Marinated Tenders								3.99	20	3.99	
Drumsticks Thighs Wings Necks Smoked Drumsticks Smoked Wings	2.19	40	2.19		2.29 2.29 2.29	60 60 60	2.29 2.29 2.29				
Smoked Necks  GROUND TURKEY:  Patties				2.00	4.70	20	4.55	3.99	70	3.99	
Sausage 85% lean 93% lean	2.39 - 3.00 2.74 - 3.49	240 140	2.49 3.02	3.99 2.39 3.19	- 3.19	30 190 210	4.55 2.45 3.25	3.27 2.39 3.19 - 3.99	70 20 200	3.27 2.39 3.64	
Breast (99-100% lean) Rolls (frsh/frz 1 lb.)	4.16 2.50 - 2.99	10	4.16	3.99		300	4.83	3.90 - 5.88 2.50 - 2.99	150 40	4.16	
Specialty <sup>5/</sup> Patties								4.99	10	4.99	
93-94% lean Breast	5.99	340	5.99		5.99	550	5.99	4.49 5.49 - 5.99	10 340	4.49 5.98	



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

Fri. Apr 11, 2014

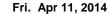
Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/11 thru 04/17.

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

	N	ATIONAL	SUMMAF	RY			NORTHEAST U.S.		SOUTHE	SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	77.6% o	f 22,900	77.6% o	f 22,900	75.2% o	f 23,200						
Feature Rate 1/	sto	res	sto	res	sto	res	95.4% of 4,700 s	ampled outlets	83.4% of 5,900 sampled outlets			
A ativitus landaus O/	47	000	40	200		470	Activity Inde	ex = 15,920	Activity Index = 7,880			
Activity Index 2/	47,	990	49,	360	51,	170	Price Range	Summary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,030	7.72	6,050	8.04	3,840	8.08	6.48 - 9.99	1,900 7.79	6.99 - 7.99	100	7.54	
Private Brand	1,950	7.03	1,720	7.46	2,850	7.61	6.99 - 11.99	310 8.63	6.49 - 6.99	1,280	6.57	
Category 2												
Processor Brand	3,920	5.79	3,530	5.83	4,920	5.90	4.99 - 6.99	990 5.61	4.38 - 6.99		6.03	
Private Brand	7,280	7.23	3,620	6.69	7,200	7.47	4.99 - 6.99	2,510 6.78	5.99 - 6.99	730	6.93	
Category 3												
Processor Brand	1,230	4.14	940	4.08	920	4.11	3.99 - 4.97	600 4.02	3.99 - 4.38	160 4	4.05	
Private Brand	60	4.71	210	5.88	230	4.55	3.97 - 4.98	60 4.71				
Turkey Ham	<b>570</b>	4.00	000	4.00	400	4.00	2.00 5.40	400 4.40				
Processor Brand Private Brand	570	4.28	260	4.03	480	4.08	3.98 - 5.49	460 4.43				
Turkey Pastrami												
Processor Brand	390	4.02	220	4.59	580	4 45	3.49 - 3.99	350 3.68				
Private Brand	390	4.02	220	4.59	580	4.45	3.49 - 3.99	350 3.00				
SERVICE DELI - Chicken												
Category 1	0.040	0.07	2.050	7.50	0.040	7 44	4.00	4 000 0 04	F 40 C 00	4.470		
Processor Brand Private Brand	3,640 2,150	6.87 7.43	3,050 730	7.56 7.26		7.41 8.00	4.99 - 9.99 6.99 - 7.99	1,800 6.81 1,100 7.80	5.49 - 6.99 6.49 - 7.99	, -	6.88 6.93	
Category 2	2,130	7.43	730	7.20	1,000	0.00	6.99 - 7.99	1,100 7.00	0.49 - 7.99	800	0.93	
Processor Brand	280	5.77	180	4.96	70	5.24	4.97	20 4.97				
Private Brand	70	6.33	160	6.08	260	5.87	4.97	20 4.37				
SELF-SERVICE DELI	70	0.00	100	0.00	200	3.07						
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,800	3.12	12,310	2.84	9,890	2.85	2.50 - 3.99	2,290 3.28	2.49 - 3.50	1,200	2.94	
Private Brand	2,740	2.67	1,070	2.63	2,280	3.18	2.50 - 3.29	480 2.79	2.33 - 2.79	,	2.50	
Turkey 16 oz												
Processor Brand	1,550	4.79	2,110	4.37	1,700	5.51	3.99 - 5.99	520 4.57	3.98 - 5.99	140	4.94	
Private Brand	80	5.99										
Chicken 7-10 oz												
Processor Brand	7,510	3.11	12,260	2.84	9,800	2.85	2.50 - 3.99	2,050 3.22	2.49 - 3.50	,	2.95	
Private Brand	2,740	2.67	940	2.61	2,260	3.18	2.50 - 3.29	480 2.79	2.33 - 2.79	350 2	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)





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

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/11 thru 04/17.

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

	MIDW	EST U.S.	SOUTH CI	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	•			·		, , , , , , ,			
reature Rate	79.6% of 4,200	sampled outlets	58.9% of 4,200	sampled outlets	63.7% of 2,800 sampled outlets	69.0% of 1,200 sampled outlets			
Activity Index 2/		ndex = 8,510		ndex = 6,480	Activity Index = 6,080	Activity Index = 3,120			
,	Price Range	Summary	Price Range	Summary	Price Range Summary	Price Range Summary			
SERVICE DELI - Turkey	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound) Stores Wtd Avg	(\$/pound) Stores Wtd Avg			
Category 1									
Processor Brand	5.95 - 8.99	700 7.74	6.99 - 9.99	630 8.30	8.99 - 10.99 20 9.85	5.99 - 12.99 680 6.91			
Private Brand	6.98 - 10.99	210 7.63	5.99 - 7.99	150 6.78	0.99 - 10.99 20 9.03	3.99 - 12.99 000 0.91			
Category 2	0.00 10.00	210 7.00	0.00 7.00	100 0.70					
Processor Brand	4.98 - 6.99	1,050 5.78	4.99 - 5.99	170 5.42	4.99 - 5.99 940 5.94	4.99 - 5.99 150 5.65			
Private Brand	4.99 - 7.99	80 6.46	6.99 - 7.99	1,110 7.32	6.99 - 7.99 1,900 7.56	7.99 950 7.99			
Category 3									
Processor Brand Private Brand	2.99 - 4.69	200 4.00	3.29 - 4.99	180 4.07	3.99 40 3.99	4.99 - 7.99 50 6.90			
Turkey Ham									
Processor Brand Private Brand	3.49 - 3.99	30 3.68	3.29 - 4.99	30 3.63	2.99 - 3.79 50 3.66				
Turkey Pastrami									
Processor Brand	3.98 - 8.99	30 7.64	4.99	10 4.99					
Private Brand	3.90 - 0.99	30 7.04	4.99	10 4.99					
SERVICE DELI - Chicken									
Category 1  Processor Brand	5.98 - 8.99	240 7.19	5.99 - 9.29	220 7.64	7.99 - 8.49 20 8.22	5.99 190 5.99			
Private Brand	6.99 - 7.99	260 7.19	6.99 - 7.49	190 7.36	7.99 - 0.49 20 0.22	3.99			
Category 2	0.00 7.00	200 7.00	0.00 7.40	100 7.00					
Processor Brand	4.59 - 5.99	260 5.83							
Private Brand	4.99 - 6.99	40 5.83	6.99	30 6.99					
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	2.49 - 3.99	1,510 2.93	1.99 - 2.49	1,280 3.03	2.50 - 3.50 1,120 3.24	2.99 - 3.50 400 3.37			
Private Brand	2.50 - 3.78	970 2.68	2.50 - 3.00	530 2.60	2.50 - 2.99 350 2.81	2.50 60 2.50			
Turkey 16 oz									
Processor Brand	3.88 - 5.49	540 4.88	3.98 - 4.99	180 4.88	4.99 170 4.99				
Private Brand						5.99 80 5.99			
Chicken 7-10 oz	2.40 2.00	1 420 2 04	1.00 0.50	1 240 2 05	250 250 4400 004	200 250 500			
Processor Brand Private Brand	2.49 - 3.99 2.50 - 3.78	1,420 2.94 970 2.68	1.99 - 2.50 2.50 - 3.00	1,240 3.05 530 2.60	2.50 - 3.50	2.99 - 3.50 500 3.39 2.50 60 2.50			
Filvate Brand	2.00 - 3.78	910 2.08	2.30 - 3.00	330 Z.00	2.50 - 2.88   550   2.81	2.50 00 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)