



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/16 thru 05/22.

Fri. May 16, 2014

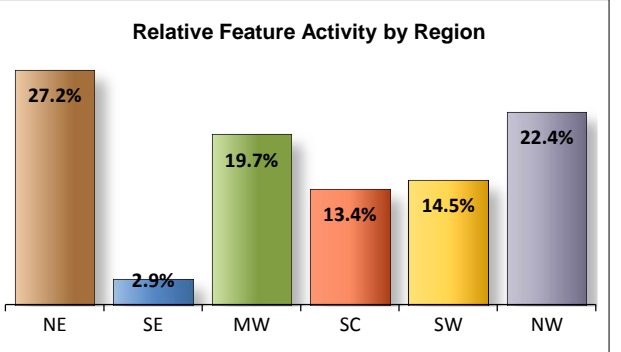
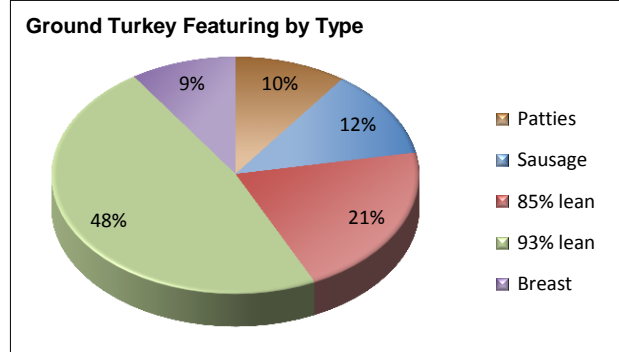
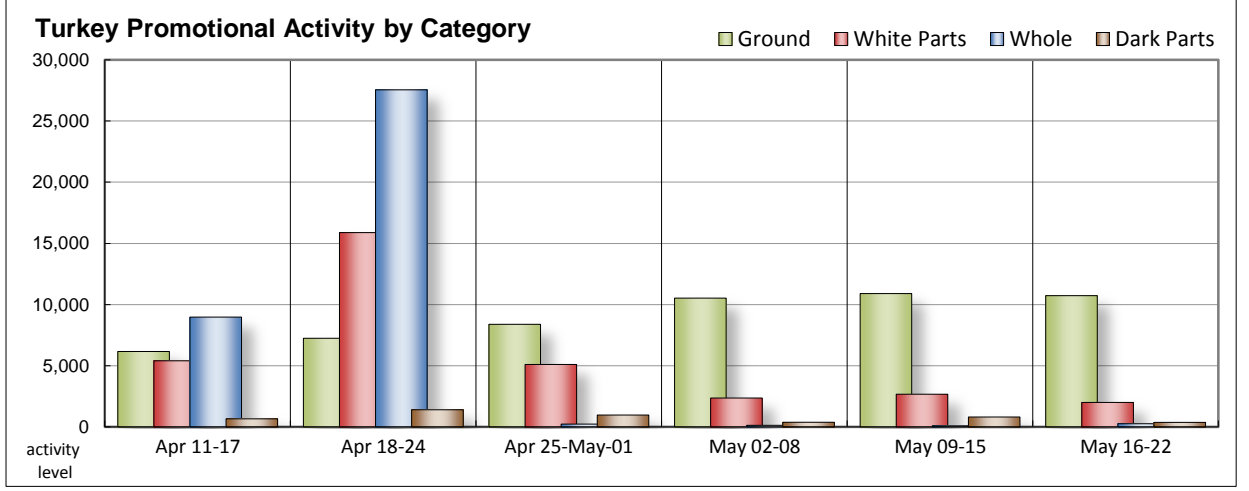
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	41.0% of 22,900 outlets		50.1% of 22,900 outlets		48.6% of 23,200 outlets	
Special Rate ^{4/}	0.4%		1.5%		4.4%	
Activity Index ^{2/}	15,000		15,350		14,980	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	50	0.99	50	0.99	40	0.99
" - Toms	220	1.38	50	0.99	40	0.99
PARTS:						
Breast:						
Bone-in, whole						
Fresh	10	2.29	120	2.07	30	2.49
Frozen	680	1.69	720	1.59	2,470	1.29
Split, bone-in						
Fresh	50	3.19	20	3.49		
Rotisserie	90	5.60	30	7.99	1,710	9.62
Boneless, whole			50	4.98	30	3.99
Cutlets	300	4.73	1,070	4.96	330	4.87
Cutlets, thin sliced	140	4.99	270	4.99		
Strips						
Tenders	100	4.65	100	4.98	110	4.17
Marinated Tenders	640	4.25	300	3.49	100	4.27
Drumsticks	220	1.82	50	1.72	280	1.88
Thighs	30	2.56	10	1.69	20	1.99
Wings	50	2.02	100	2.48	330	2.14
Necks	10	1.69	30	1.75	20	1.99
Smoked Drumsticks	10	1.99	200	2.63	290	2.08
Smoked Wings	60	2.39	220	2.26	290	1.99
Smoked Necks			210	2.25	130	1.99
GROUND TURKEY:	10,730	3.44	10,900	3.42	7,470	3.19
Patties	1,070	3.56	430	3.81	500	3.44
Sausage	1,300	3.35	1,020	2.96	420	3.35
85% lean	2,240	2.77	2,900	2.52	2,530	2.44
93% lean	5,110	3.57	3,920	3.27	3,010	3.23
Breast	1,010	4.42	2,630	4.93	1,010	4.77
Rolls (frsh/frz 1 lb.)	1,020	2.65	260	2.49	490	2.15
Specialty ^{5/}						
Patties	130	3.99			70	5.07
93-94% lean	430	3.99	560	4.30	700	4.08
Breast	30	6.16	30	4.99	30	5.82

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

This Week's Turkey Feature Highlights

Retail feature activity declines as stores begin to focus on more traditional Memorial Day items. A few more stores are offering frozen whole turkeys; prices are higher on toms this week. Fewer retailers are promoting bone-in breasts; prices are higher on fresh and frozen bone-in breasts. Feature activity continues very light on rotisserie breasts. Offerings decline on boneless white parts; prices are mostly lower. Marinated tenders are getting the most ad space this week and are the only boneless white part with higher prices. Offerings slow on dark parts and are mostly centered on fresh drums. Ground turkey promotions decline; the weighted average price increases. Almost half the feature activity is on 93% lean. A large number of stores are promoting ground turkey rolls; offerings also increase on specialty grinds. Deli turkey promotional activity is sharply higher, mostly due to very active featuring on self-service deli. Service deli featuring is most active on thick slicing meats. Self-service deli prices are mixed on processor brands, higher on 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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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	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/}	61.5% of 4,700 sampled outlets 1.9% of stores w/ no-price promotions Activity Index = 5,310			15.2% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 770			45.0% of 4,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 3,500		
	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	1.49	170	1.49						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57	20	1.57	1.38	40	1.38	1.49 - 1.99	580	1.74
Split, bone-in									
Fresh	2.99 - 3.49	50	3.19						
Rotisserie	4.99 - 8.99	90	5.60						
Boneless, whole									
Cutlets	4.99	110	4.99				4.54 - 5.45	190	4.58
Cutlets, thin sliced	4.99	140	4.99						
Strips									
Tenders	3.99	10	3.99				4.69 - 4.79	10	4.75
Marinated Tenders	3.73 - 4.26	270	4.14				3.19 - 5.33	320	4.49
Drumsticks	1.69 - 1.99	150	1.72				1.49 - 1.69	20	1.61
Thighs	2.99	20	2.99				1.69	10	1.69
Wings	2.29	20	2.29				1.49 - 1.69	20	1.61
Necks							1.69	10	1.69
Smoked Drumsticks							1.99	10	1.99
Smoked Wings	2.39	60	2.39						
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 4.48	730	3.58	3.00 - 3.49	70	3.44	2.99 - 3.99	170	3.43
Sausage	2.99 - 3.99	850	3.27	3.99	20	3.99	2.99 - 3.99	320	3.32
85% lean	2.68 - 3.66	260	2.78	2.40 - 3.00	190	2.82	1.99 - 3.50	1,070	2.71
93% lean	2.31 - 3.84	1,460	3.23	2.49 - 3.74	200	3.15	2.39 - 4.00	390	3.18
Breast (99-100% lean)	3.84 - 5.76	360	4.75	3.84 - 4.61	250	3.97	3.99 - 4.99	50	4.80
Rolls (frsh/frz 1 lb.)							2.29 - 2.99	310	2.72
Specialty ^{5/}									
Patties	3.99	130	3.99						
93-94% lean	3.99	390	3.99				3.50	20	3.50
Breast	5.99	20	5.99						



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/16 thru 05/22.

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(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 ^{1/}	41.2% of 4,200 sampled outlets			50.8% of 2,800 sampled outlets			53.3% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,370			Activity Index = 1,860			Activity Index = 1,190		
	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	0.99	50	0.99						
" - Toms	0.99	50	0.99						
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.29	10	2.29
Frozen	0.99	20	0.99	1.39	10	1.39	1.99	10	1.99
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	4.69	10	4.69	4.61 - 5.49	70	4.73			
Marinated Tenders	3.33	30	3.33				3.33	20	3.33
Drumsticks	2.19 - 2.29	50	2.21						
Thighs									
Wings	2.29	10	2.29						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.59 - 3.89	90	3.65	3.99	10	3.99			
Sausage	3.27 - 3.43	80	3.41	5.29	30	5.29			
85% lean	2.49 - 2.99	480	2.91	2.66 - 3.19	240	2.70			
93% lean	2.91 - 4.00	620	3.58	3.19 - 4.00	1,390	3.99	3.18 - 4.00	1,050	3.73
Breast (99-100% lean)	3.27 - 4.99	250	4.21	4.61	60	4.61	4.39 - 5.59	40	4.79
Rolls (frsh/frz 1 lb.)	2.49 - 3.39	630	2.64	2.49	40	2.49	2.49 - 2.50	40	2.50
Specialty ^{5/}									
Patties									
93-94% lean				4.59	10	4.59	4.49	10	4.49
Breast							6.49	10	6.49



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 05/16 thru 05/22.

(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		83.6% of 4,700 sampled outlets			71.9% of 5,900 sampled outlets		
Feature Rate ^{1/}	74.6% of 22,900 stores		60.5% of 22,900 stores		63.9% of 23,200 stores		Activity Index = 16,560			Activity Index = 9,360		
Activity Index ^{2/}	52,260		43,510		37,400		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,460	7.85	5,010	7.87	5,680	7.97	6.48 - 10.99	1,930	8.23	6.99 - 9.99	320	7.90
Private Brand	2,990	7.74	3,310	7.07	2,110	7.73	6.47 - 8.99	2,020	7.52	7.99	500	7.99
Category 2												
Processor Brand	2,950	5.73	5,060	5.77	3,410	5.91	4.49 - 5.99	940	5.35	4.99 - 6.49	180	5.94
Private Brand	3,090	6.79	650	6.21	2,730	6.78	4.99 - 7.99	290	5.86	4.99 - 7.99	230	6.90
Category 3												
Processor Brand	1,680	4.19	1,390	4.16	1,420	4.33	3.99 - 4.99	1,400	4.31	2.99 - 3.68	90	3.17
Private Brand	770	6.41	40	4.48	250	4.24	5.48	90	5.48			
Turkey Ham												
Processor Brand	380	3.94	660	4.44	220	3.56	3.99 - 4.99	170	4.16	3.49	30	3.49
Private Brand												
Turkey Pastrami												
Processor Brand	450	4.22	510	4.12	290	3.96	3.99	270	3.99	3.39	40	3.39
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,440	7.26	3,270	7.62	4,130	7.77	5.48 - 9.99	910	7.63	6.99 - 8.99	1,040	7.06
Private Brand	1,500	7.14	1,400	5.98	1,290	7.59	6.98 - 7.99	1,370	7.06			
Category 2												
Processor Brand	430	5.72	360	5.07	190	5.58	3.99	20	3.99			
Private Brand	160	6.08			190	5.94						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	11,700	2.95	8,490	2.92	5,930	2.96	2.50 - 3.99	3,050	3.13	2.50 - 3.33	2,360	3.09
Private Brand	2,750	2.58	1,840	2.93	1,840	2.97	2.50 - 3.29	780	2.67	2.33 - 2.99	590	2.54
Turkey 16 oz												
Processor Brand	1,850	4.41	1,620	5.27	580	4.76	3.99	100	3.99	3.99 - 4.99	1,060	4.03
Private Brand			170	4.99								
Chicken 7-10 oz												
Processor Brand	11,050	2.92	7,930	2.92	5,450	2.95	2.50 - 3.99	2,570	3.05	2.50 - 3.33	2,330	3.10
Private Brand	2,610	2.57	1,800	2.96	1,690	2.99	2.50 - 3.29	650	2.64	2.33 - 2.99	590	2.54

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)



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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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				66.8% of 4,200 sampled outlets				73.5% of 2,800 sampled outlets			81.2% of 1,200 sampled outlets		
	Activity Index = 11,680				Activity Index = 7,610				Activity Index = 4,600			Activity Index = 2,450		
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 - 9.59	920	7.64	6.49 - 10.99	710	7.53	6.99 - 7.99	550	7.21	6.99 - 12.99	30	9.63		
Private Brand	7.49 - 10.99	200	8.14	7.49 - 7.99	130	7.77	7.99 - 9.49	140	9.42					
Category 2														
Processor Brand	4.98 - 6.99	1,200	6.02	5.99 - 6.99	380	6.08	4.99 - 6.99	200	5.19	4.49 - 5.99	50	4.89		
Private Brand	4.99 - 6.99	830	5.97	6.99 - 7.99	710	7.52	7.99	310	7.99	4.99 - 8.99	720	6.83		
Category 3														
Processor Brand	2.99 - 3.99	110	3.85	3.39	10	3.39	3.59 - 3.99	70	3.67					
Private Brand	6.99	10	6.99	2.99 - 6.99	260	5.80	6.99	280	6.99	6.99	130	6.99		
Turkey Ham														
Processor Brand	2.59	10	2.59	3.79	10	3.79	3.29 - 4.79	150	3.96	2.99	10	2.99		
Private Brand														
Turkey Pastrami														
Processor Brand	3.98 - 7.99	40	5.82	3.99 - 7.99	100	4.54								
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	5.99 - 7.99	710	7.20	5.99 - 7.99	390	6.73	6.49 - 9.99	250	7.10	6.99 - 9.99	140	8.46		
Private Brand	7.99	130	7.99											
Category 2														
Processor Brand	4.97 - 5.99	410	5.81											
Private Brand	5.99 - 6.98	160	6.08											
SELF-SERVICE DELI (dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	1.99 - 3.99	2,660	2.83	1.99 - 2.50	1,910	2.74	1.99 - 3.99	1,140	2.82	2.50 - 3.00	580	2.89		
Private Brand	1.99 - 3.29	830	2.58	2.50 - 3.09	360	2.51	2.50	130	2.50	2.50	60	2.50		
Turkey 16 oz														
Processor Brand	3.99 - 4.98	70	4.93	3.49 - 4.99	420	4.64	5.99	110	5.99	4.50 - 5.99	90	5.84		
Private Brand														
Chicken 7-10 oz														
Processor Brand	1.99 - 3.99	2,570	2.83	1.99 - 3.00	1,860	2.74	1.99 - 3.99	1,140	2.82	2.50 - 3.00	580	2.89		
Private Brand	1.99 - 3.29	820	2.58	2.50	360	2.50	2.50	130	2.50	2.50	60	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)