



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/08 thru 11/14.

Fri. Nov 08, 2013

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

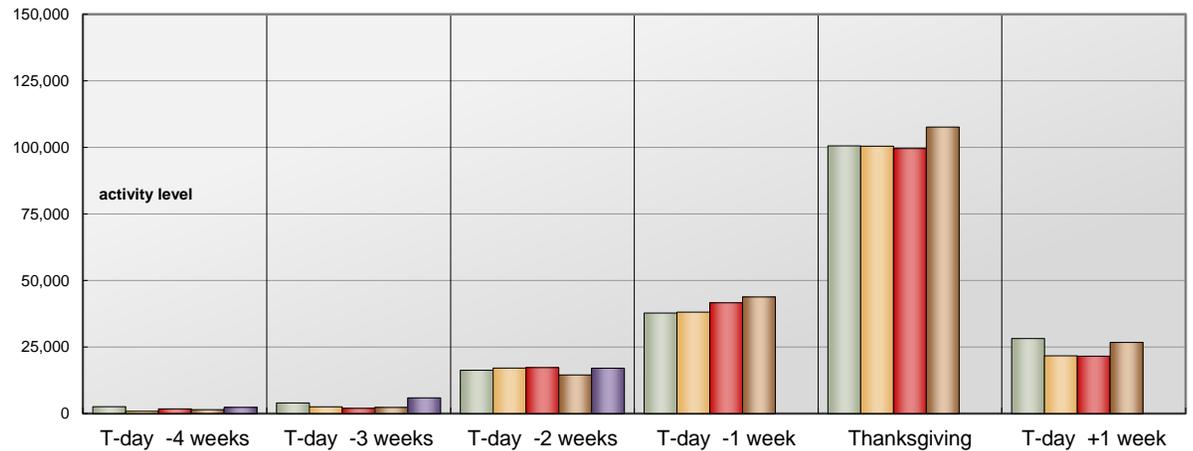
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	67.0% of 23,200 outlets		49.6% of 23,200 outlets		43.6% of 22,500 outlets	
Special Rate ^{4/}	3.7%		0.7%		1.9%	
Activity Index ^{2/}	37,940		21,530		28,370	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	190	1.58			20	1.99
" - Toms	190	1.58			20	1.99
Frozen - Hens	8,210	0.92	2,980	0.90	7,310	0.92
" - Toms	8,520	0.91	2,980	0.90	7,220	0.89
PARTS:						
Breast:						
Bone-in, whole						
Fresh			20	1.89	30	3.49
Frozen	4,840	1.76	2,840	1.65	1,740	1.90
Split, bone-in						
Fresh	20	2.74	210	2.99	20	2.99
Rotisserie	230	6.52	430	7.32	870	8.31
Boneless, whole	70	5.58	400	5.04	20	3.99
Cutlets	780	4.70	710	4.24	880	4.15
Cutlets, thin sliced			140	4.99		
Strips						
Tenders	520	4.31			890	4.01
Marinated Tenders	1,130	4.29			310	4.87
Drumsticks	130	1.84	130	1.70	20	1.64
Thighs					10	1.99
Wings	130	1.84	40	1.65	70	2.75
Necks	10	1.39	10	1.49	10	1.29
Smoked Drumsticks	280	2.54	10	1.99	70	1.99
Smoked Wings	210	2.25	60	1.91	60	1.82
Smoked Necks	260	2.05	10	2.19	60	1.82
GROUND TURKEY:	10,700	3.58	8,660	3.53	8,420	3.53
Patties	570	3.88	650	3.40	370	3.81
Sausage	2,060	3.29	620	2.94	620	3.40
85% lean	1,780	3.11	820	2.53	610	2.52
93% lean	4,100	3.27	4,180	3.16	4,770	3.24
Breast	2,190	4.75	2,390	4.84	2,050	4.61
Rolls (frsh/frz 1 lb.)	770	3.22	250	2.67	80	2.10
Specialty ^{5/}						
Patties	200	4.79	60	4.99	10	5.99
93-94% lean	440	4.84	970	4.30	180	4.55
Breast	110	6.33	620	5.50	50	5.82

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

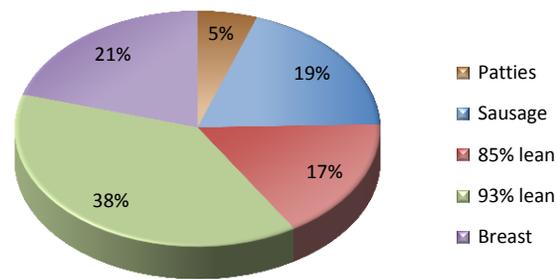
This Week's Turkey Feature Highlights

Retail promotional activity increases on turkey items. More stores are showing "no price" specials, purchased based promotions, and prepared Thanksgiving dinners. Offerings are very active on frozen hens and toms; a few stores are offering fresh whole turkeys. Frozen bone in breast promotions increase in volume; prices are higher than last week but lower compared to the same week a year ago. Fewer stores are featuring rotisserie breasts. Offerings increase on boneless white parts; tenders and marinated tenders return to the ad pages. Shoppers looking for dark parts will be pleased to find more fresh and smoked parts in this week's ads; prices trend higher on drums and wings. Ground turkey is heavily promoted; prices are higher on all the grinds with the exception of ground breast. Service deli and self-service deli items are more actively promoted. Advertised prices are lower on thick slicing meats and on private label self-service deli items.

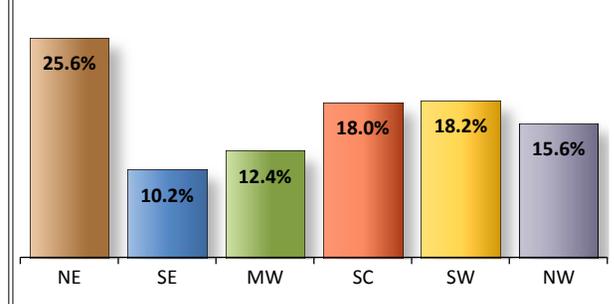
Whole Bird Activity Index during the Thanksgiving Season



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/}	79.7% of 4,600 sampled outlets			64.5% of 6,100 sampled outlets			57.1% of 4,200 sampled outlets		
Special Rate ^{4/}	0.9% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.8% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 11,640			Activity Index = 6,320			Activity Index = 5,120		
	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							1.49 - 2.19	40	1.90
" - Toms							1.49 - 2.19	40	1.93
Frozen - Hens	0.49 - 1.69	920	0.78	0.69 - 1.79	1,810	1.08	0.59 - 1.49	1,190	1.02
" - Toms	0.49 - 1.69	930	0.77	0.69 - 1.79	1,810	1.08	0.59 - 1.49	1,210	1.02
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 2.69	1,150	1.84	0.99 - 1.99	1,530	1.73	0.98 - 1.99	1,050	1.60
Split, bone-in									
Fresh	2.49	10	2.49						
Rotisserie	6.00	130	6.00	6.99	10	6.99	6.99	10	6.99
Boneless, whole	4.99 - 5.97	70	5.58						
Cutlets	3.99 - 4.99	500	4.64	3.99 - 4.98	230	4.82	5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders	3.49 - 4.99	410	4.32	3.99	40	3.99	3.98 - 4.79	70	4.48
Marinated Tenders	3.73 - 5.33	970	4.29	4.26	40	4.26	4.53 - 5.33	30	4.82
Drumsticks	1.69 - 1.88	120	1.86				1.39 - 1.69	10	1.55
Thighs									
Wings	1.69 - 1.88	120	1.86				1.39 - 1.69	10	1.55
Necks							1.39	10	1.39
Smoked Drumsticks	1.99 - 2.69	200	2.62	2.69	40	2.69			
Smoked Wings	1.99 - 2.48	200	2.27	1.89	10	1.89			
Smoked Necks	1.98 - 1.99	200	1.99	1.89 - 1.99	20	1.95			
GROUND TURKEY:									
Patties	3.98	40	3.98				2.99 - 3.50	80	3.11
Sausage	2.46 - 3.99	1,230	3.26	2.79 - 3.69	160	3.25	2.87 - 3.69	230	3.26
85% lean	2.33 - 3.49	430	2.76	2.33 - 2.99	210	2.55	2.33 - 3.50	130	2.70
93% lean	2.92 - 3.98	2,010	3.16	2.74 - 3.33	170	3.08	2.80 - 3.99	730	3.23
Breast (99-100% lean)	3.49 - 5.38	1,260	4.70	4.61 - 5.99	170	5.47	3.69 - 5.49	70	4.75
Rolls (frsh/frz 1 lb.)	1.99	20	1.99	2.79	70	2.79	2.99	170	2.99
Specialty ^{5/}									
Patties	3.99 - 4.99	200	4.79						
93-94% lean	3.99 - 4.99	440	4.84						
Breast	5.99 - 6.99	80	6.46				5.99	30	5.99



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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/}	64.3% of 4,200 sampled outlets			73.2% of 2,900 sampled outlets			59.8% of 1,200 sampled outlets		
Special Rate ^{4/}	6.7% of stores w/ no-price promotions			13.9% of stores w/ no-price promotions			9.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,450			Activity Index = 5,470			Activity Index = 1,940		
	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	1.49	80	1.49	1.49	70	1.49			
" - Toms	1.49	80	1.49	1.49	70	1.49			
Frozen - Hens	0.50 - 0.77	2,100	0.89	0.49 - 0.99	1,390	0.73	0.59 - 1.58	800	1.00
" - Toms	0.50 - 0.77	2,100	0.89	0.49 - 0.99	1,670	0.70	0.59 - 1.59	800	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.39 - 1.99	1,040	1.90	1.49	20	1.49	1.59 - 1.79	50	1.70
Split, bone-in									
Fresh	2.99	10	2.99						
Rotisserie	6.99 - 8.99	80	7.23						
Boneless, whole									
Cutlets	4.59	40	4.59						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.39	50	4.39				3.99	40	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks				1.99	40	1.99			
Smoked Wings									
Smoked Necks	2.39	40	2.39						
GROUND TURKEY:									
Patties	2.88	10	2.88	2.88 - 4.99	440	4.03			
Sausage	2.37	10	2.37	2.37 - 4.99	420	3.44	3.52	10	3.52
85% lean	2.79 - 3.79	350	3.40	2.31 - 3.99	620	3.45	2.79 - 3.79	40	3.17
93% lean	2.74 - 3.99	520	3.53	2.87 - 4.29	650	3.51	3.59 - 4.29	20	4.09
Breast (99-100% lean)	3.29 - 5.99	560	4.52	5.27 - 5.99	80	5.65	3.99 - 5.99	50	4.73
Rolls (frsh/frz 1 lb.)	1.50 - 4.99	380	3.88				2.00	130	2.00
Specialty ^{5/}									
Patties									
93-94% lean									
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 11/08 thru 11/14.

(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		90.7% of 4,600 sampled outlets Activity Index = 14,890			75.9% of 6,100 sampled outlets Activity Index = 11,540		
Feature Rate ^{1/}	75.8% of 23,200 stores		70.5% of 23,200 stores		69.2% of 22,500 stores							
Activity Index ^{2/}	51,080		44,450		46,010							
	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	4,620	7.67	3,970	7.98	9,050	7.74	5.99 - 9.99	2,340	7.78	6.39 - 8.99	900	7.28
Private Brand	3,290	7.11	1,490	7.37	4,630	7.51	6.99 - 8.99	2,270	7.06	7.49	70	7.49
Category 2												
Processor Brand	4,370	5.79	2,960	5.77	4,320	5.91	4.98 - 5.99	1,080	5.59	4.99 - 6.99	930	6.09
Private Brand	3,330	7.22	2,120	6.47	2,100	6.19	5.99 - 7.99	230	6.86	5.99 - 7.99	190	6.97
Category 3												
Processor Brand	1,210	4.00	600	4.00	420	3.80	2.99 - 4.99	400	3.96			
Private Brand	430	4.60	2,490	5.54	1,490	5.26	3.99 - 4.48	60	4.34			
Turkey Ham												
Processor Brand	290	3.77	210	3.47	610	3.82	3.49 - 4.99	200	3.97			
Private Brand	60	3.98					3.98 - 3.99	60	3.98			
Turkey Pastrami												
Processor Brand	200	4.52	250	6.82	440	3.98	3.99 - 4.99	140	4.66			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,030	7.37	2,750	7.74	2,470	7.27	5.98 - 9.99	1,180	7.48	5.98 - 8.99	940	7.41
Private Brand	2,450	7.13	1,780	7.30	2,050	7.22	5.99 - 8.48	1,770	7.53			
Category 2												
Processor Brand	180	4.16	30	5.75	70	5.46	3.99	140	3.99			
Private Brand	270	5.67	1,030	5.98								
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,430	3.03	6,690	2.72	8,340	3.16	2.49 - 4.00	1,960	3.16	2.19 - 3.33	3,070	3.07
Private Brand	2,340	2.55	7,060	3.17	630	3.11	2.48 - 2.99	440	2.50	2.50	570	2.50
Turkey 16 oz												
Processor Brand	2,110	5.18	350	5.23	790	5.05	3.59 - 5.99	430	5.06	3.99 - 5.99	1,240	5.04
Private Brand	60	3.77	60	4.99								
Chicken 7-10 oz												
Processor Brand	10,070	3.03	6,680	2.72	7,970	3.15	2.49 - 4.00	1,750	3.14	2.19 - 3.33	3,060	3.07
Private Brand	2,340	2.55	3,930	3.04	630	3.11	2.48 - 2.99	440	2.50	2.50	570	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)



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)		
	72.9% of 4,200 sampled outlets			65.6% of 4,200 sampled outlets			68.6% of 2,900 sampled outlets			80.3% of 1,200 sampled outlets		
	Activity Index = 9,000			Activity Index = 7,530			Activity Index = 5,400			Activity Index = 2,720		
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	5.98 - 9.99	480	7.36	6.99 - 9.99	340	8.44	5.99 - 8.99	400	7.45	6.99 - 12.99	160	8.06
Private Brand	6.99 - 10.99	870	7.18	6.99 - 7.99	70	7.33	7.99	10	7.99			
Category 2												
Processor Brand	4.99 - 6.99	840	5.86	4.99 - 5.99	1,010	5.60				4.99 - 5.99	510	5.94
Private Brand	4.99 - 7.99	920	6.43	6.49 - 7.99	930	7.34	7.99	590	7.99	7.49 - 7.99	470	7.85
Category 3												
Processor Brand	3.98 - 4.98	150	4.14	3.99	210	3.99	3.99	450	3.99			
Private Brand							3.99 - 4.99	370	4.65			
Turkey Ham												
Processor Brand	3.69 - 3.98	20	3.81	2.99 - 3.19	20	3.11	2.78 - 3.99	50	3.24			
Private Brand												
Turkey Pastrami												
Processor Brand	3.79 - 4.98	60	4.20									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.99	300	7.89	5.99 - 7.99	440	7.05	5.99 - 8.99	170	6.29			
Private Brand	5.99 - 6.99	580	6.00	5.99 - 7.99	100	6.48						
Category 2												
Processor Brand	3.99 - 4.99	40	4.76									
Private Brand	5.58 - 5.99	230	5.69	5.58	40	5.58						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,690	2.82	2.99 - 3.49	1,620	3.00	2.50 - 3.99	1,410	3.02	2.50 - 3.50	680	3.11
Private Brand	2.50 - 2.99	430	2.52	2.50 - 3.00	560	2.68	2.50	270	2.50	2.50	70	2.50
Turkey 16 oz												
Processor Brand	4.98 - 5.99	310	5.57	4.99 - 5.99	50	5.78				5.99	80	5.99
Private Brand	3.77	60	3.77									
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,590	2.82	2.99 - 3.49	1,580	3.01	2.50 - 3.99	1,410	3.02	2.50 - 3.50	680	3.11
Private Brand	2.50 - 2.99	430	2.52	2.50 - 3.00	560	2.68	2.50	270	2.50	2.50	70	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)