



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/15 thru 11/21.

Fri. Nov 15, 2013

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

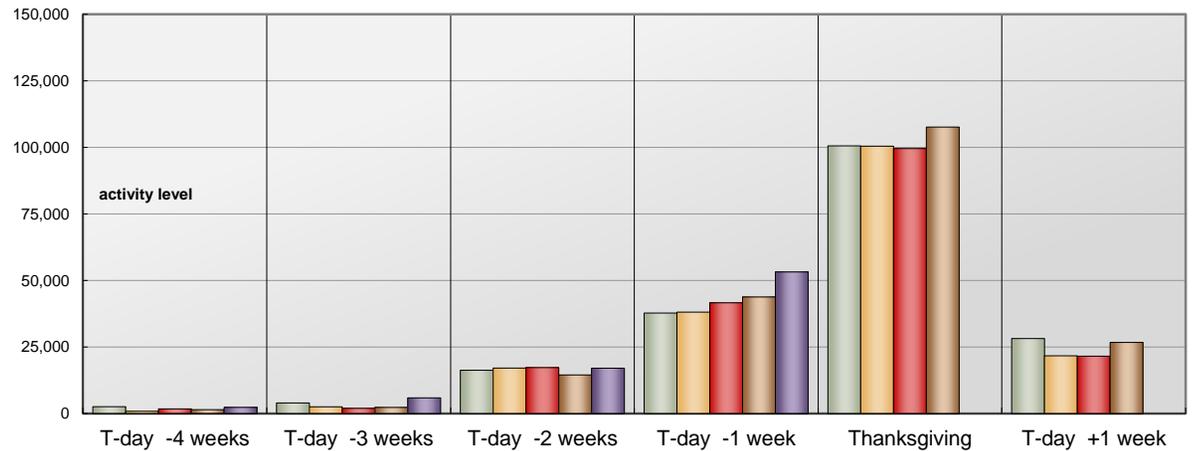
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	79.1% of 23,200 outlets		67.0% of 23,200 outlets		75.0% of 22,500 outlets	
Special Rate ^{4/}	4.3%		3.7%		3.9%	
Activity Index ^{2/}	72,240		37,940		63,280	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	2,290	1.45	190	1.58	1,360	1.42
" - Toms	2,290	1.45	190	1.58	1,350	1.42
Frozen - Hens	24,110	0.93	8,210	0.92	20,280	0.90
" - Toms	24,560	0.92	8,520	0.91	20,860	0.89
PARTS:						
Breast:						
Bone-in, whole						
Fresh	450	2.87			390	2.94
Frozen	7,540	1.86	4,840	1.76	5,180	1.94
Split, bone-in						
Fresh			20	2.74	10	2.49
Rotisserie	390	8.11	230	6.52	660	8.53
Boneless, whole						
Cutlets	260	4.81	780	4.70	350	4.36
Cutlets, thin sliced					50	4.99
Strips	170	4.99				
Tenders	420	4.45	520	4.31	810	4.37
Marinated Tenders	310	4.83	1,130	4.29	410	4.25
Drumsticks	60	1.54	130	1.84	520	1.89
Thighs	10	2.18				
Wings	20	1.41	130	1.84	490	1.89
Necks	10	1.29	10	1.39		
Smoked Drumsticks	70	2.43	280	2.54	170	2.10
Smoked Wings	90	2.20	210	2.25	240	1.96
Smoked Necks	70	1.98	260	2.05	230	1.90
GROUND TURKEY:	8,660	3.39	10,700	3.58	9,240	3.27
Patties	90	3.50	570	3.88	780	3.73
Sausage	1,840	3.34	2,060	3.29	1,300	3.26
85% lean	3,290	2.69	1,780	3.11	1,300	2.43
93% lean	1,370	3.26	4,100	3.27	4,500	3.04
Breast	2,070	4.83	2,190	4.75	1,360	4.72
Rolls (frsh/frz 1 lb.)	310	2.23	770	3.22	230	2.28
Specialty ^{5/}						
Patties			200	4.79		
93-94% lean	150	3.39	440	4.84	350	3.99
Breast			110	6.33	30	6.32

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

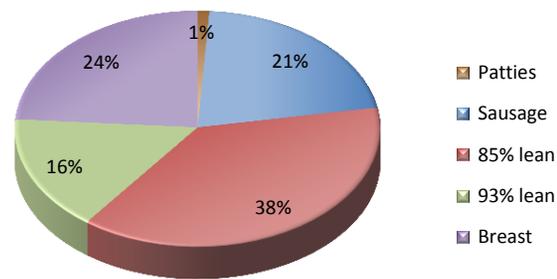
This Week's Turkey Feature Highlights

Thanksgiving is less than two weeks away and turkey promotions are taking center stage. Retailers are matching competitors' advertised prices and using purchased based promotions. Feature activity on frozen whole turkeys has taken off and exceeds last year's volume; prices are higher this year. Offerings of fresh whole turkeys increase late in the ad cycle; volume and prices are higher compared to a year ago. Featuring on free range, organic, kosher and other specialty turkeys also kicks in. Frozen bone-in breasts find more space in the circulars and ads on fresh bone-in breasts start to appear in the Northeast. Offerings on rotisserie breasts and boneless white parts slow, as expected. Fewer stores offer dark parts, maybe they will get more ad space next week. Ground turkey promotions decrease in number; 85% ground is the most frequently offered and lowest priced. Fewer stores feature deli items. Service deli offerings slow; prices are mostly higher on processor brands, lower on private brands. Self-service deli promotions are sharply fewer in number; prices increase on processor brands, decrease on private brands.

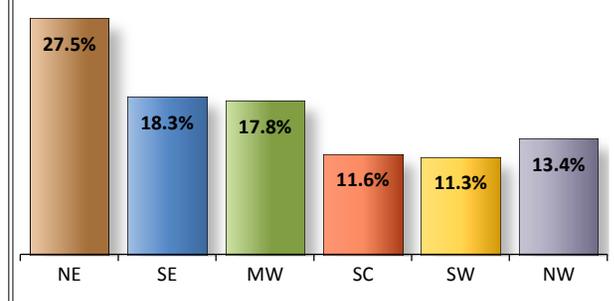
Whole Bird Activity Index during the Thanksgiving Season



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/}	84.8% of 4,600 sampled outlets			90.4% of 6,100 sampled outlets			79.9% of 4,200 sampled outlets		
Special Rate ^{4/}	2.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			6.2% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 21,950			Activity Index = 19,980			Activity Index = 12,960		
	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	0.99 - 2.49	1,830	1.44	0.99 - 1.49	130	1.24	1.39 - 1.99	240	1.52
" - Toms	0.99 - 2.49	1,830	1.44	0.99 - 1.49	130	1.24	1.39 - 1.99	240	1.52
Frozen - Hens	0.37 - 1.79	5,040	0.89	0.39 - 1.69	8,060	0.94	0.47 - 1.69	4,490	1.01
" - Toms	0.37 - 1.79	5,220	0.89	0.47 - 1.69	7,810	0.95	0.47 - 1.69	4,740	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49 - 3.49	450	2.87	0.99 - 2.99	1,990	1.79	0.99 - 2.49	2,050	1.74
Frozen	1.38 - 2.99	2,300	2.02						
Split, bone-in									
Fresh	6.99 - 8.99	230	8.41	6.99	20	6.99	6.99	30	6.99
Rotisserie									
Boneless, whole									
Cutlets	3.99 - 4.99	190	4.90	4.49 - 5.45	70	4.58	4.49 - 4.79	40	4.54
Cutlets, thin sliced	4.99	170	4.99						
Strips									
Tenders	3.92 - 4.99	200	4.84	4.49 - 4.79	40	4.54	4.49 - 4.79	40	4.54
Marinated Tenders	4.79 - 4.99	260	4.92						
Drumsticks				1.39	10	1.39	1.29 - 2.18	50	1.57
Thighs							2.18	10	2.18
Wings							1.29 - 1.69	20	1.41
Necks							1.29	10	1.29
Smoked Drumsticks	1.99 - 2.48	20	2.12	2.69	40	2.69	1.99	10	1.99
Smoked Wings	1.68 - 2.99	30	2.65	1.89 - 1.99	50	1.97	1.99	10	1.99
Smoked Necks	1.98 - 1.99	20	1.99	1.89 - 1.99	50	1.97			
GROUND TURKEY:									
Patties				3.00	20	3.00	3.49 - 3.79	40	3.54
Sausage	2.79 - 4.09	1,550	3.36	2.79 - 3.50	110	3.18	2.87 - 3.79	170	3.25
85% lean	2.33 - 3.33	1,450	2.72	2.19 - 2.79	1,320	2.65	2.33 - 2.80	220	2.41
93% lean	2.53 - 3.99	650	3.33	3.00 - 3.07	50	3.05	2.99 - 3.49	230	3.05
Breast (99-100% lean)	4.61 - 4.79	380	4.62	4.61 - 5.79	190	5.28	4.79 - 5.19	90	5.16
Rolls (frsh/frz 1 lb.)							1.79 - 2.00	180	1.99
Specialty ^{5/}									
Patties									
93-94% lean	2.99 - 4.99	130	3.40				3.33	20	3.33
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/}	66.7% of 4,200 sampled outlets			69.9% of 2,900 sampled outlets			63.0% of 1,200 sampled outlets		
Special Rate ^{4/}	3.1% 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 = 8,460			Activity Index = 5,960			Activity Index = 2,930		
	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	1.39 - 2.49	90	1.76						
" - Toms	1.39 - 2.49	90	1.76						
Frozen - Hens	0.50 - 0.77	3,210	0.88	0.53 - 1.89	2,230	0.77	0.59 - 1.79	1,080	1.09
" - Toms	0.50 - 0.77	3,200	0.88	0.49 - 1.89	2,510	0.75	0.59 - 1.79	1,080	1.09
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.48 - 1.79	950	1.83	1.49	20	1.49	1.79 - 2.49	230	2.17
Split, bone-in									
Fresh									
Rotisserie	7.99	110	7.99						
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				3.99	180	3.99			
Marinated Tenders							3.99 - 4.66	50	4.36
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.79	30	3.79						
Sausage				3.60	10	3.60			
85% lean	2.49 - 3.00	210	2.90	2.80 - 3.00	50	2.85	2.71 - 2.99	40	2.88
93% lean	2.50 - 3.19	120	2.84	3.19 - 3.99	220	3.34	3.19 - 3.99	100	3.76
Breast (99-100% lean)	5.19	350	5.19	3.99 - 4.61	730	4.46	5.19	330	5.19
Rolls (frsh/frz 1 lb.)	2.00 - 2.99	100	2.42	1.99	10	1.99	3.49	20	3.49
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 11/15 thru 11/21.

(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		90.3% of 4,600 sampled outlets			57.3% of 6,100 sampled outlets		
Feature Rate ^{1/}	65.4% of 23,200 stores		75.8% of 23,200 stores		70.9% of 22,500 stores		Activity Index = 14,340			Activity Index = 6,550		
Activity Index ^{2/}	37,050		51,080		48,360		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	7.99	4,620	7.67	3,180	7.91	5.98 - 9.99	2,690	8.09	6.99 - 8.99	310	8.47
Private Brand	2,500	7.62	3,290	7.11	3,260	7.18	6.99 - 7.99	2,080	7.69	7.49	70	7.49
Category 2												
Processor Brand	4,280	5.85	4,370	5.79	5,110	5.79	4.99 - 6.99	1,320	5.32	4.99 - 6.98	1,180	6.28
Private Brand	3,320	6.60	3,330	7.22	4,810	6.82	4.99 - 6.99	360	5.56	5.99 - 6.99	550	6.97
Category 3												
Processor Brand	1,200	4.17	1,210	4.00	850	4.04	3.99 - 4.99	420	4.21	4.28 - 4.49	100	4.44
Private Brand	60	4.41	430	4.60	40	4.48	3.99 - 4.99	50	4.49			
Turkey Ham												
Processor Brand	290	3.60	290	3.77	130	3.61	3.49 - 3.99	140	3.85	3.49	20	3.49
Private Brand			60	3.98								
Turkey Pastrami												
Processor Brand	100	4.37	200	4.52	180	4.27	3.99	40	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,350	7.52	3,030	7.37	3,050	7.87	5.77 - 8.99	610	7.25	5.99 - 7.99	1,500	7.16
Private Brand	2,090	7.14	2,450	7.13	1,460	7.40	6.99 - 7.99	1,180	7.20	6.99	530	6.99
Category 2												
Processor Brand	310	4.96	180	4.16	250	5.71	4.99	140	4.99			
Private Brand	210	5.99	270	5.67	410	6.45						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	5,360	2.85	10,430	3.03	8,120	3.02	2.00 - 3.99	1,420	3.01	2.00 - 3.99	1,070	3.00
Private Brand	1,550	2.80	2,340	2.55	4,250	2.92	2.50 - 3.33	1,090	2.81	2.50	70	2.50
Turkey 16 oz												
Processor Brand	1,140	5.07	2,110	5.18	1,030	5.31	3.99 - 4.78	320	4.13	4.99	20	4.99
Private Brand	110	4.71	60	3.77	160	3.99						
Chicken 7-10 oz												
Processor Brand	5,280	2.84	10,070	3.03	7,880	3.03	2.00 - 3.99	1,390	3.00	2.00 - 3.99	1,060	3.00
Private Brand	1,440	2.79	2,340	2.55	4,190	2.93	2.50 - 3.33	1,090	2.81	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)



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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)		
	70.9% of 4,200 sampled outlets			54.7% of 4,200 sampled outlets			55.3% of 2,900 sampled outlets			52.3% of 1,200 sampled outlets		
	Activity Index = 6,990			Activity Index = 5,140			Activity Index = 2,960			Activity Index = 1,070		
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	6.98 - 10.99	550	7.41	6.98 - 9.99	360	7.97	6.99 - 8.99	440	7.96	6.99 - 11.99	110	7.36
Private Brand	6.99 - 10.99	170	7.57	5.99 - 7.99	180	6.91						
Category 2												
Processor Brand	4.49 - 6.99	1,070	6.04	4.59 - 6.49	590	5.86	4.99	40	4.99	4.98 - 6.49	80	6.03
Private Brand	4.99 - 6.99	930	6.26	6.99 - 7.99	1,290	6.83	7.99	40	7.99	7.49 - 7.99	150	7.54
Category 3												
Processor Brand	2.98 - 4.99	400	4.25	2.99 - 4.79	190	4.01	3.49 - 3.99	90	3.73			
Private Brand					10	3.99						
Turkey Ham												
Processor Brand	2.88 - 3.79	40	3.18				2.99 - 3.79	90	3.44			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49 - 4.59	30	4.26	4.99	30	4.99						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.79 - 9.99	370	7.16	6.99 - 8.99	270	7.95	6.99 - 9.99	410	8.77	6.98 - 10.99	190	8.66
Private Brand	6.99 - 8.99	250	7.17	6.99 - 7.99	130	7.19						
Category 2												
Processor Brand	3.99 - 5.49	170	4.94									
Private Brand	5.99	210	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.33	1,240	2.75	2.00 - 2.99	720	2.70	2.50 - 2.98	750	2.64	2.67 - 3.29	160	2.81
Private Brand	2.49 - 3.69	160	3.11	2.79	120	2.79				2.50	110	2.50
Turkey 16 oz												
Processor Brand	4.99	30	4.99	4.98 - 4.99	420	4.99	4.99 - 6.99	350	6.03			
Private Brand	3.77 - 4.99	110	4.71									
Chicken 7-10 oz												
Processor Brand	2.00 - 3.33	1,210	2.74	2.00 - 2.99	710	2.70	2.50 - 2.98	750	2.64	2.67 - 3.29	160	2.81
Private Brand	2.49 - 3.69	50	3.38	2.79	120	2.79				2.50	110	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)