



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/29 thru 12/05.

Fri. Nov 29, 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/}	29.2% of 23,200 outlets		94.0% of 23,200 outlets		26.2% of 22,500 outlets	
Special Rate ^{4/}	2.1%		3.3%		3.1%	
Activity Index ^{2/}	32,500		148,980		35,380	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	4,850	1.64	22,320	1.57	5,560	1.56
" - Toms	4,850	1.64	22,380	1.57	5,560	1.56
Frozen - Hens	6,450	1.05	33,820	0.92	7,890	1.04
" - Toms	6,440	1.05	34,510	0.91	7,770	1.04
PARTS:						
Breast:						
Bone-in, whole						
Fresh	950	2.73	6,040	2.65	800	2.66
Frozen	2,850	1.79	16,440	1.82	3,260	1.85
Split, bone-in						
Fresh						
Rotisserie	1,120	7.98	3,800	8.05	890	7.74
Boneless, whole	10	4.54	50	4.99	10	4.99
Cutlets	250	4.99	340	4.99	90	4.99
Cutlets, thin sliced			140	4.99		
Strips						
Tenders			60	3.99		
Marinated Tenders	190	4.26	660	4.26	310	4.34
Drumsticks	20	1.52	520	1.78	300	2.21
Thighs			10	2.49	170	1.99
Wings	20	1.42	480	1.64	180	2.03
Necks	10	1.55	120	1.88		
Smoked Drumsticks	10	2.49	190	2.53		
Smoked Wings	20	2.09	260	2.18	30	1.75
Smoked Necks	190	1.97	330	1.99	20	1.99
GROUND TURKEY:	4,110	3.48	6,460	3.85	2,200	3.62
Patties	750	3.15	540	3.40	90	3.99
Sausage	370	3.31	430	3.37	240	3.81
85% lean	330	2.68	710	2.81	330	2.67
93% lean	1,980	3.22	3,330	3.86	1,080	3.21
Breast	680	5.12	1,450	4.66	460	5.04
Rolls (frsh/frz 1 lb.)	30	2.79	30	1.76	250	2.47
Specialty ^{5/}						
Patties	10	3.99	10	3.99	20	6.19
93-94% lean	80	4.00			70	4.18
Breast	40	5.24	10	5.99		

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

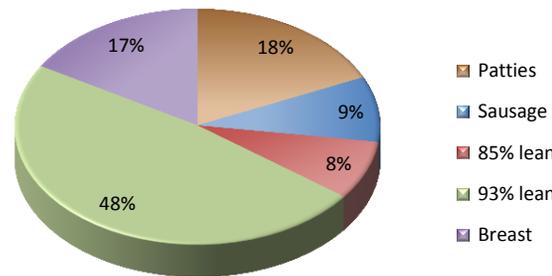
This Week's Turkey Feature Highlights

Retail feature activity slows midweek as holiday ads wrap up and we head into the post-Thanksgiving week. Some stores did not ads run past Thanksgiving Day, waiting to start with fresh ads this weekend or early next week. Offerings decrease on fresh and frozen whole turkeys; prices are higher compared to last week and to the same week a year ago. Feature activity on fresh and frozen bone-in breasts declines; prices trend higher on fresh, lower on frozen. Fewer stores promote rotisserie breasts, but there are still plenty to be found and prices are lower compared to last week. There isn't much interest in running ads on boneless white parts, no surprise there. Last week was the time to shop for dark parts; this week shoppers will have to search for the limited offerings. Ground turkey featuring slows; 93% lean is the most active. Deli promotional activity drops sharply on both service and self-service deli items. We'll just have to wait until ads get back to normal schedules next week.

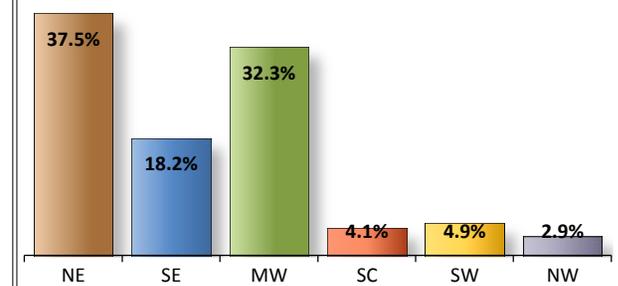
Whole Bird Activity Index during the Thanksgiving Season



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/}	67.3% of 4,600 sampled outlets			20.4% of 6,100 sampled outlets			41.0% of 4,200 sampled outlets		
Special Rate ^{4/}	3.5% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			4.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 12,260			Activity Index = 8,100			Activity Index = 9,600		
	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	0.79 - 1.99	1,550	1.42	0.99 - 1.99	1,350	1.66	1.19 - 2.49	1,780	1.81
" - Toms	0.79 - 1.99	1,550	1.42	0.99 - 1.99	1,350	1.66	1.19 - 2.49	1,780	1.81
Frozen - Hens	0.47 - 1.89	2,000	1.10	0.45 - 1.79	1,720	1.03	0.48 - 1.59	1,950	1.00
" - Toms	0.47 - 1.89	2,000	1.10	0.45 - 1.79	1,710	1.03	0.48 - 1.59	1,950	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.39 - 2.79	150	2.73	2.59 - 2.99	10	2.79	2.49 - 2.99	630	2.77
Frozen	1.49 - 2.69	600	1.95	1.25 - 2.19	1,140	1.68	1.49 - 2.99	860	1.85
Split, bone-in									
Fresh									
Rotisserie	7.00 - 8.99	300	7.35	7.49 - 8.99	530	8.20	6.98 - 8.99	290	8.24
Boneless, whole									
Cutlets	3.99 - 4.99	10	4.54						
Cutlets, thin sliced	4.99	250	4.99						
Strips									
Tenders									
Marinated Tenders	4.26	150	4.26	4.26	40	4.26			
Drumsticks									
Thighs				1.49	10	1.49	1.39 - 1.69	10	1.55
Wings				1.29	10	1.29	1.39 - 1.69	10	1.55
Necks							1.39 - 1.69	10	1.55
Smoked Drumsticks	2.48 - 2.49	10	2.49						
Smoked Wings	2.48 - 2.49	10	2.49	1.69	10	1.69			
Smoked Necks	1.98 - 1.99	180	1.99	1.69	10	1.69			
GROUND TURKEY:									
Patties	3.00 - 3.99	640	3.14	3.00	70	3.00			
Sausage	2.63 - 3.99	310	3.26	3.19	20	3.19			
85% lean	1.99 - 3.00	290	2.66				2.49 - 3.29	40	2.80
93% lean	3.07 - 3.84	1,620	3.22	3.07	80	3.07	2.49 - 3.49	210	3.25
Breast (99-100% lean)	4.79 - 6.15	520	5.37	4.79	40	4.79	3.99	70	3.99
Rolls (frsh/frz 1 lb.)									
Specialty ^{5/}									
Patties	3.99	10	3.99						
93-94% lean	3.99 - 4.00	80	4.00						
Breast	4.99	30	4.99				5.99	10	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/}	7.9% of 4,200 sampled outlets			6.4% of 2,900 sampled outlets			12.9% of 1,200 sampled outlets		
Special Rate ^{4/}	2.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.6% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,230			Activity Index = 1,050			Activity Index = 260		
	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 - 1.99	120	1.67	1.39 - 1.79	30	1.62	1.79	20	1.79
" - Toms	1.49 - 1.99	120	1.67	1.39 - 1.79	30	1.62	1.79	20	1.79
Frozen - Hens	0.89 - 1.29	330	1.10	0.98 - 1.19	430	0.99	0.99	20	0.99
" - Toms	0.89 - 1.29	330	1.10	0.98 - 1.19	430	0.99	0.99	20	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.19 - 2.99	20	2.41				2.59 - 2.89	140	2.60
Frozen	1.29 - 1.99	220	1.74	1.99	10	1.99	1.29	20	1.29
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.69	40	3.69			
Sausage				3.69	40	3.69			
85% lean									
93% lean	3.50	30	3.50	2.95	40	2.95			
Breast (99-100% lean)	4.39	30	4.39				4.39	20	4.39
Rolls (frsh/frz 1 lb.)	2.79	30	2.79						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 29, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/29 thru 12/05.

(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		63.5% of 4,600 sampled outlets Activity Index = 10,020			17.4% of 6,100 sampled outlets Activity Index = 2,800		
Feature Rate ^{1/}	25.5% of 23,200 stores		75.0% of 23,200 stores		27.7% of 22,500 stores							
Activity Index ^{2/}	17,630		43,890		17,520							
	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	2,780	7.54	6,030	7.81	2,300	7.85	5.99 - 12.99	1,960	7.56	6.99 - 7.99	80	7.86
Private Brand	1,810	7.29	2,230	7.49	2,470	7.05	6.99 - 8.99	1,430	7.18	7.49 - 7.99	140	7.73
Category 2												
Processor Brand	1,190	5.83	3,230	5.66	1,160	5.91	4.99 - 5.99	460	5.85	4.99 - 6.99	200	6.12
Private Brand	1,250	5.96	5,620	5.76	500	6.26	5.99	420	5.99	5.98	580	5.98
Category 3												
Processor Brand	270	4.04	610	4.01	270	3.59	3.99 - 4.98	100	4.11	3.99	10	3.99
Private Brand	90	5.40	80	4.47	50	4.90	3.99 - 5.48	90	5.40			
Turkey Ham												
Processor Brand	110	3.73	340	3.80	90	3.40	3.99	50	3.99			
Private Brand												
Turkey Pastrami												
Processor Brand	160	4.24	190	4.15	230	3.56	3.99 - 4.49	110	4.27			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,510	7.25	1,920	7.51	1,350	8.17	5.99 - 8.99	780	7.86	7.99	50	7.99
Private Brand	710	7.09	1,660	7.62	1,490	7.10	6.99	600	6.99	6.99	70	6.99
Category 2												
Processor Brand	110	4.84	80	5.04	20	4.97	3.99	20	3.99			
Private Brand	230	5.99	160	5.99	80	5.98	5.99	20	5.99			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2,100	3.01	9,490	2.97	1,820	3.30	2.29 - 3.98	550	3.01	2.79 - 3.33	720	3.08
Private Brand	1,180	2.77	720	2.91	1,980	3.14	2.50 - 3.50	1,040	2.80	2.49 - 2.50	80	2.50
Turkey 16 oz												
Processor Brand	1,110	4.63	1,560	5.17	40	4.44	3.99 - 5.48	1,000	4.59	4.99	70	4.99
Private Brand					40	4.49						
Chicken 7-10 oz												
Processor Brand	1,800	3.02	9,310	2.95	1,650	3.26	2.99 - 3.98	310	3.08	2.79 - 3.33	720	3.08
Private Brand	1,220	2.81	660	2.94	1,980	3.14	2.50 - 3.33	1,080	2.83	2.49 - 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)



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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)		
	35.9% of 4,200 sampled outlets			7.5% of 4,200 sampled outlets			1.9% of 2,900 sampled outlets			2.3% of 1,200 sampled outlets		
	Activity Index = 3,810			Activity Index = 690			Activity Index = 130			Activity Index = 180		
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	5.99 - 8.99	430	7.29	6.49 - 7.99	120	7.11	8.99	10	8.99	6.99 - 12.99	180	8.03
Private Brand	6.99 - 7.99	190	7.61	7.99	50	7.99						
Category 2												
Processor Brand	4.98 - 6.99	390	5.72	4.99 - 6.99	140	5.69						
Private Brand	3.98 - 6.99	250	5.88									
Category 3												
Processor Brand	3.99 - 4.79	60	4.11	3.69	20	3.69	3.49 - 4.49	80	3.99			
Private Brand												
Turkey Ham												
Processor Brand	3.99	30	3.99	3.19	10	3.19	2.49 - 3.29	20	2.97			
Private Brand												
Turkey Pastrami												
Processor Brand	3.99	30	3.99				4.49	20	4.49			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 7.99	600	6.56	5.99	80	5.99						
Private Brand	10.99	10	10.99	7.99	30	7.99						
Category 2												
Processor Brand	4.79 - 5.99	90	5.02									
Private Brand	5.99	210	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.50 - 3.50	710	2.99	2.19 - 2.99	120	2.73						
Private Brand	2.50 - 2.99	60	2.73									
Turkey 16 oz												
Processor Brand	4.98 - 4.99	40	4.99									
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.50 - 3.50	650	2.98	2.19 - 2.99	120	2.73						
Private Brand	2.50 - 2.99	60	2.73									

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)