



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/06 thru 12/12.**

Fri. Dec 06, 2013

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

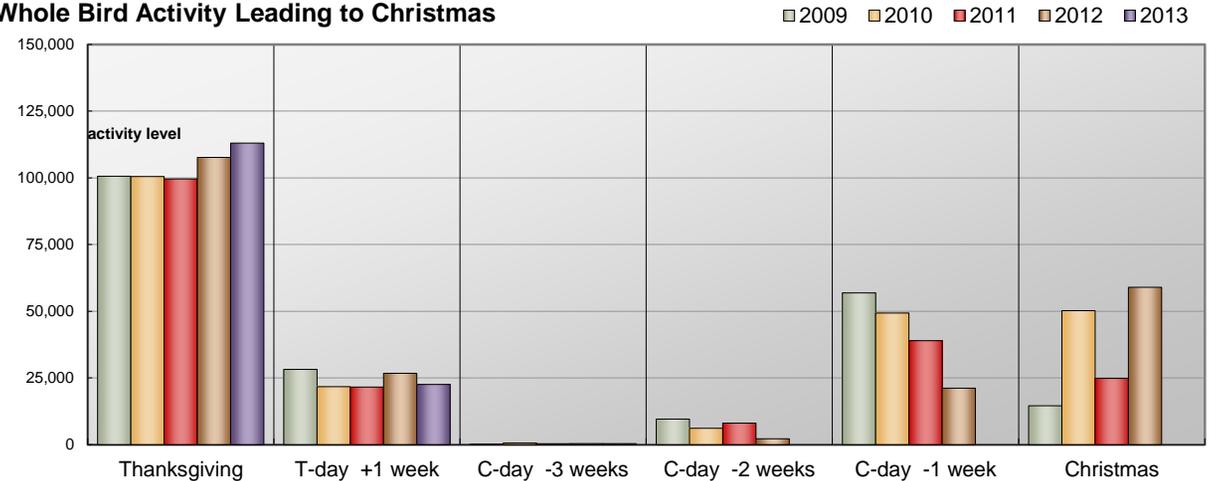
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>45.7% of 23,200 outlets</b>		<b>29.2% of 23,200 outlets</b>		<b>30.2% of 22,500 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>1.9%</b>		<b>2.1%</b>		<b>3.2%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>18,880</b>		<b>32,500</b>		<b>9,790</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens	10	1.69	4,850	1.64	10	1.99
" - Toms	10	1.69	4,850	1.64	10	1.99
Frozen - Hens	200	1.08	6,450	1.05	210	1.09
" - Toms	200	1.08	6,440	1.05	210	1.09
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	10	2.69	950	2.73	10	2.48
Frozen	750	1.61	2,850	1.79	210	1.78
Split, bone-in						
Fresh	20	2.34				
Rotisserie	370	7.89	1,120	7.98	180	7.07
Boneless, whole	40	5.48	10	4.54		
Cutlets	1,350	4.48	250	4.99	560	5.37
Cutlets, thin sliced						
Strips						
Tenders	410	3.99			250	5.02
Marinated Tenders	510	4.34	190	4.26	220	4.17
Drumsticks	260	1.81	20	1.52	150	1.73
Thighs						
Wings	300	1.82	20	1.42	150	1.73
Necks	20	1.37	10	1.55	60	1.62
Smoked Drumsticks	80	2.42	10	2.49	130	1.99
Smoked Wings	90	2.11	20	2.09	130	1.99
Smoked Necks	70	1.92	190	1.97	10	1.98
<b>GROUND TURKEY:</b>	<b>12,900</b>	<b>3.23</b>	<b>4,110</b>	<b>3.48</b>	<b>6,840</b>	<b>3.39</b>
Patties	750	3.44	750	3.15	110	3.16
Sausage	790	3.48	370	3.31	1,020	3.44
85% lean	5,260	2.84	330	2.68	1,390	2.60
93% lean	5,830	3.46	1,980	3.22	3,130	3.21
Breast	270	4.84	680	5.12	1,190	4.72
Rolls (frsh/frz 1 lb.)	280	2.18	30	2.79	290	1.85
<b>Specialty</b> <sup>5/</sup>						
Patties	70	4.31	10	3.99		
93-94% lean	860	3.72	80	4.00	130	3.59
Breast	70	5.96	40	5.24	30	6.07

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

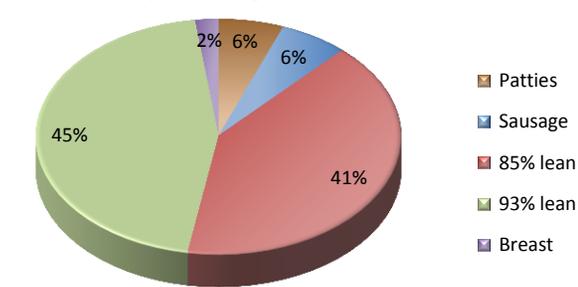
**This Week's Turkey Feature Highlights**

Feature activity continues to slow as Thanksgiving is but a memory and Christmas is still a few weeks away; next week should be busier. Fresh and frozen whole turkeys are getting limited space in this week's circulars. Retailers back off on promotions for bone-in breasts, but features on frozen are still easy to find. Fewer stores promote rotisserie breasts; prices are lower. Offerings increase on boneless white parts; cutlets are getting the most attention and prices are lower this week. Consumers looking for dark parts will find featuring more active, especially on fresh drums and wings. Feature activity increases on ground turkey; the 85% lean and the 93% lean account for most of the ad space. Featuring is also active on 93-94% specialty ground turkey. Deli promotions have taken off and are heavily promoted; over half the ads are for self-service deli items. Service deli promotions are most active on the thin slicing meats. Advertised prices on processor label self-service deli items trend higher, private label prices are lower.

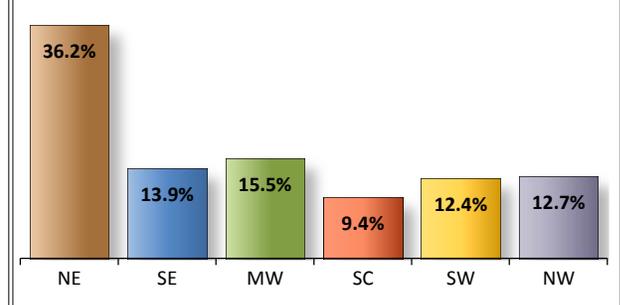
**Whole Bird Activity Leading to Christmas**



**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 <sup>1/</sup>	68.5% of 4,600 sampled outlets			48.4% of 6,100 sampled outlets			35.2% of 4,200 sampled outlets		
Special Rate <sup>4/</sup>	1.3% of stores w/ no-price promotions			3.4% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 7,640			Activity Index = 4,010			Activity Index = 2,970		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.69	10	1.69						
" - Toms	1.69	10	1.69						
Frozen - Hens				0.99 - 1.19	140	1.09	0.88	10	0.88
" - Toms				0.99 - 1.19	140	1.09	0.88	10	0.88
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh							2.69	10	2.69
Frozen	1.49 - 1.79	100	1.72	1.25 - 1.79	420	1.57	1.49 - 1.99	200	1.63
Split, bone-in									
Fresh	1.99	10	1.99				2.69	10	2.69
Rotisserie	6.99 - 8.24	210	7.90						
Boneless, whole	5.48	40	5.48						
Cutlets	3.99 - 5.45	1,070	4.51	3.99	70	3.99	4.49	170	4.49
Cutlets, thin sliced									
Strips									
Tenders	3.99	410	3.99						
Marinated Tenders	4.26	320	4.26	4.53	110	4.53	4.53	20	4.53
Drumsticks	1.49 - 1.98	230	1.84				1.29 - 1.69	30	1.51
Thighs									
Wings	1.29 - 1.98	230	1.73				1.29 - 1.69	30	1.51
Necks							1.29 - 1.50	20	1.37
Smoked Drumsticks	1.99	20	1.99	2.69	40	2.69	2.29	20	2.29
Smoked Wings	1.99	20	1.99	1.99	40	1.99	2.29	20	2.29
Smoked Necks	1.99	20	1.99	1.99	40	1.99	1.49	10	1.49
<b>GROUND TURKEY:</b>									
Patties	3.00 - 3.99	210	3.27	3.00 - 3.49	240	3.41	2.99 - 3.89	230	3.46
Sausage	3.19 - 3.99	340	3.62				2.80 - 3.89	210	3.22
85% lean	1.99 - 3.33	1,720	2.80	2.00 - 3.19	1,190	2.60	1.99 - 3.19	660	2.92
93% lean	2.27 - 3.99	1,930	3.24	2.50 - 3.99	1,580	3.43	2.91 - 3.99	720	3.72
Breast (99-100% lean)	4.99 - 5.38	50	5.05				4.49	60	4.49
Rolls (frsh/frz 1 lb.)							2.00 - 2.99	220	2.23
<b>Specialty <sup>5/</sup></b>									
Patties	3.99 - 5.99	70	4.31						
93-94% lean	3.49 - 4.99	550	3.53				3.99 - 4.49	310	4.05
Breast	4.99 - 6.49	70	5.96						



**USDA Weekly Retail Turkey Feature Activity**  
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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)		
<b>Feature Rate</b> <sup>1/</sup>	34.0% of 4,200 sampled outlets			37.9% of 2,900 sampled outlets			40.0% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	1.7% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			9.0% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 1,810			Activity Index = 1,720			Activity Index = 730		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.09 - 1.18	50	1.11						
" - Toms	1.09 - 1.18	50	1.11						
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.67 - 1.78	30	1.74						
Split, bone-in									
Fresh									
Rotisserie	6.99	90	6.99	8.99	70	8.99			
Boneless, whole									
Cutlets	4.49	40	4.49						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.39	30	4.39				4.39	30	4.39
Drumsticks									
Thighs									
Wings	2.59	40	2.59						
Necks									
Smoked Drumsticks									
Smoked Wings	2.49	10	2.49						
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties							3.99	70	3.99
Sausage	2.99	20	2.99	4.79	40	4.79	2.99 - 3.99	180	3.29
85% lean	2.00 - 3.19	490	3.00	2.33 - 3.49	1,110	3.00	2.79 - 3.19	90	3.12
93% lean	3.19 - 3.99	760	3.72	3.19 - 3.99	500	3.70	3.19 - 3.99	340	3.41
Breast (99-100% lean)	4.99	150	4.99				3.59	10	3.59
Rolls (frsh/frz 1 lb.)	1.00 - 2.00	50	1.82				2.79	10	2.79
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean									
Breast									



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

Fri. Dec 06, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/06 thru 12/12.

(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		91.5% of 4,600 sampled outlets Activity Index = 17,720			52.6% of 6,100 sampled outlets Activity Index = 8,100		
Feature Rate <sup>1/</sup>	67.1% of 23,200 stores		25.5% of 23,200 stores		75.1% of 22,500 stores							
Activity Index <sup>2/</sup>	46,370		17,630		41,180							
	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
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	3,360	8.07	2,780	7.54	4,580	8.14	5.99 - 10.99	1,440	8.44	6.99 - 9.49	400	8.52
Private Brand	2,130	7.81	1,810	7.29	2,650	7.96	6.99 - 8.99	1,240	7.41	7.49	70	7.49
<b>Category 2</b>												
Processor Brand	4,090	6.00	1,190	5.83	5,440	6.14	4.99 - 6.99	1,510	6.05	4.99 - 6.99	410	6.55
Private Brand	3,190	5.94	1,250	5.96	950	6.49	4.99 - 6.99	1,960	5.92	5.99	430	5.99
<b>Category 3</b>												
Processor Brand	1,020	4.15	270	4.04	580	4.20	3.99 - 4.99	720	4.25	3.99	30	3.99
Private Brand	60	4.34	90	5.40	120	4.99	3.99 - 4.48	60	4.34			
<b>Turkey Ham</b>												
Processor Brand	450	3.34	110	3.73	220	3.55	2.79 - 4.99	290	3.37			
Private Brand	40	3.98			20	3.99	3.98	40	3.98			
<b>Turkey Pastrami</b>												
Processor Brand	70	4.17	160	4.24	170	4.14	3.79 - 4.99	50	4.14			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	3,110	7.59	1,510	7.25	3,850	7.07	5.99 - 9.99	1,200	8.18	5.99 - 6.99	670	6.94
Private Brand	1,750	6.61	710	7.09	1,560	7.15	5.99 - 7.99	1,620	6.54	6.99	70	6.99
<b>Category 2</b>												
Processor Brand	70	5.35	110	4.84	280	5.01	4.99 - 5.99	30	5.49			
Private Brand	130	5.99	230	5.99								
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	10,090	3.09	2,100	3.01	7,570	3.10	2.49 - 3.99	3,060	3.09	2.50 - 3.99	2,160	3.14
Private Brand	2,090	2.76	1,180	2.77	2,650	2.66	2.48 - 3.00	550	2.73	2.50 - 2.98	170	2.64
<b>Turkey 16 oz</b>												
Processor Brand	2,890	5.03	1,110	4.63	460	5.01	3.99 - 5.99	570	4.73	4.98 - 5.99	1,410	5.00
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	9,740	3.10	1,800	3.02	7,430	3.11	2.49 - 3.99	2,830	3.10	2.50 - 3.99	2,110	3.15
Private Brand	2,090	2.76	1,220	2.81	2,650	2.69	2.48 - 3.00	550	2.73	2.50 - 2.98	170	2.64

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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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/06 thru 12/12.

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

Feature Rate <sup>1/</sup>	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)		
	74.7% of 4,200 sampled outlets			59.3% of 4,200 sampled outlets			61.3% of 2,900 sampled outlets			59.5% of 1,200 sampled outlets		
	Activity Index = 9,520			Activity Index = 5,550			Activity Index = 3,680			Activity Index = 1,800		
Activity Index <sup>2/</sup>	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	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 9.99	800	7.50	6.99 - 8.99	410	7.29	6.99 - 9.49	200	7.28	5.99 - 12.99	110	10.06
Private Brand	6.99 - 10.99	170	8.18	5.99 - 7.99	250	7.48	7.99 - 9.49	400	9.13			
<b>Category 2</b>												
Processor Brand	4.99 - 6.99	1,050	6.07	4.99 - 6.99	710	5.52	4.99	40	4.99	5.98 - 6.99	370	6.01
Private Brand	4.99 - 6.29	460	5.49	5.99	120	5.99	6.99	220	6.99			
<b>Category 3</b>												
Processor Brand	2.99 - 4.99	190	4.05	3.49	70	3.49				3.98	10	3.98
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	2.49 - 3.99	20	3.09				2.49 - 3.99	140	3.30			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.99 - 6.95	10	5.47				2.99	10	2.99			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.89 - 9.99	790	7.19	6.99 - 9.49	360	7.19				6.99 - 10.99	90	9.88
Private Brand	7.99	30	7.99	7.99	30	7.99						
<b>Category 2</b>												
Processor Brand	4.95 - 5.99	40	5.24									
Private Brand	5.98 - 5.99	130	5.99									
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	1.99 - 3.99	1,880	2.85	1.99 - 2.66	1,250	3.00	2.66 - 3.99	1,210	3.37	1.99 - 3.99	530	3.33
Private Brand	2.50 - 3.00	780	2.75	2.50 - 3.00	470	2.87	2.50	40	2.50	2.50 - 2.99	80	2.90
<b>Turkey 16 oz</b>												
Processor Brand	4.99 - 5.99	540	5.40	3.99 - 5.99	200	5.05	4.99	170	4.99			
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	1.99 - 3.99	1,850	2.85	1.99 - 2.66	1,210	3.02	2.66 - 3.99	1,210	3.37	1.99 - 3.99	530	3.33
Private Brand	2.50 - 3.00	780	2.75	2.50 - 3.00	470	2.87	2.50	40	2.50	2.50 - 2.99	80	2.90

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)