



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/07 thru 02/13.

Fri. Feb 07, 2014

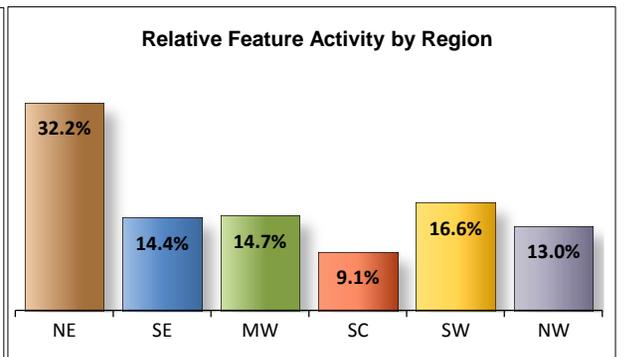
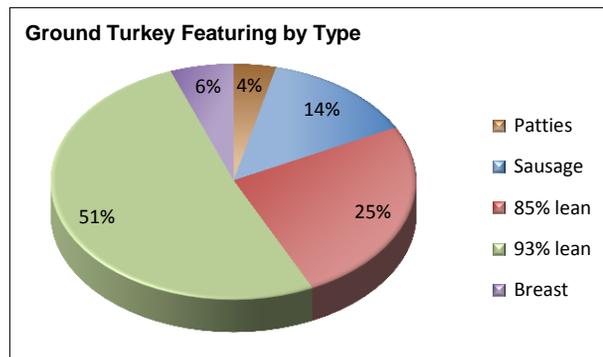
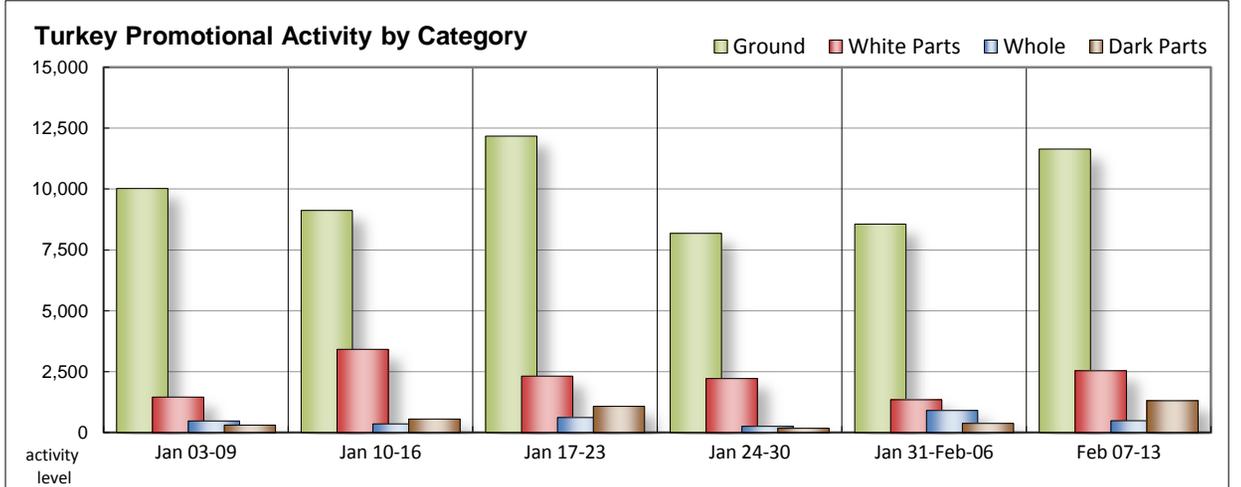
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	50.3% of 22,900 outlets		33.7% of 22,900 outlets		35.6% of 23,200 outlets	
Special Rate ^{4/}	9.7%		0.9%		3.9%	
Activity Index ^{2/}	17,080		12,080		14,270	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	330	1.01	480	0.95	1,450	0.92
" - Toms	160	1.03	430	0.91	1,450	0.92
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.84	10	2.99	110	2.51
Frozen	730	1.80	1,060	1.82	550	1.77
Split, bone-in						
Fresh	70	2.94			50	2.99
Rotisserie	430	7.94	50	6.36	540	8.34
Boneless, whole	260	5.90	10	4.99	10	4.99
Cutlets	590	5.13	150	5.11	400	5.05
Cutlets, thin sliced	90	4.99				
Strips						
Tenders	350	5.16	70	4.79	230	4.35
Marinated Tenders	270	3.87	290	4.42	150	4.55
Drumsticks	420	1.90	100	1.75	270	1.67
Thighs	140	2.26	10	2.49	20	2.09
Wings	460	1.87	50	1.83	260	1.68
Necks	40	1.57	20	1.62	230	1.69
Smoked Drumsticks	70	2.28	110	2.03	80	1.89
Smoked Wings	90	2.05	50	2.13	80	1.89
Smoked Necks	90	1.96	40	2.17	20	1.59
GROUND TURKEY:	11,640	3.15	8,560	3.30	7,450	3.45
Patties	440	3.70	1,030	3.44	710	3.30
Sausage	1,600	3.44	1,380	3.46	1,330	3.35
85% lean	2,960	2.60	1,540	2.73	1,120	2.62
93% lean	5,980	3.21	4,200	3.27	2,500	3.26
Breast	660	4.28	410	4.81	1,790	4.28
Rolls (frsh/frz 1 lb.)	160	1.39	250	2.08	500	1.47
Specialty ^{5/}						
Patties			10	5.49	40	3.99
93-94% lean	570	4.01	300	4.82	340	3.65
Breast	100	6.16	30	5.99	40	6.62

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

This Week's Turkey Feature Highlights

Retailers increase feature activity on turkey and deli items. No price promotions are also more active. There are limited offerings on frozen hens and toms at higher prices. Featuring slows on frozen bone-in breasts but they are still easy to find in the circulars. Rotisserie breasts are finally getting more ad space; prices are higher. Boneless white parts are also seeing more feature activity, especially cutlets and tenders; however, the best bargain this week is marinated tenders. It has been a long time since shoppers have had so many offerings on dark parts; fresh drums and wings are heavily promoted. Feature activity increases on ground turkey; the weighted average price is lower as prices decline on all the grinds except patties. Over half the ads focus on 93% lean. Deli activity increases on service and self-service deli items, especially on private brands. Service deli offerings increase on thin slicing meats and shaving meats. Advertised prices on self-service deli were almost unchanged from last week, with the exception of 16 ounce sizes, which cost less.



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)		
Special Rate ^{4/} Activity Index ^{2/}	62.3% of 4,700 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 6,260			60.6% of 5,900 sampled outlets 23.9% of stores w/ no-price promotions Activity Index = 3,810			45.3% of 4,200 sampled outlets 9.2% of stores w/ no-price promotions Activity Index = 2,590		
	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	140	0.99				0.89 - 1.19	140	1.01
" - Toms							0.99 - 1.19	110	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49 - 2.99	20	2.84						
Frozen	1.57 - 1.99	140	1.90	1.28 - 1.97	240	1.89	1.27 - 1.99	200	1.83
Split, bone-in									
Fresh	2.49 - 2.99	70	2.94						
Rotisserie	6.99 - 8.99	270	8.02				6.99	10	6.99
Boneless, whole	5.48 - 5.99	240	5.90	5.99	20	5.99			
Cutlets	5.99 - 6.99	60	6.09	4.99 - 5.99	450	5.03			
Cutlets, thin sliced							4.99	90	4.99
Strips									
Tenders	4.99 - 5.99	210	5.18	5.99	20	5.99	4.99	90	4.99
Marinated Tenders	3.73	160	3.73				3.99	60	3.99
Drumsticks	1.48 - 2.49	290	1.78				1.49 - 1.59	20	1.53
Thighs	1.79 - 2.49	30	2.14						
Wings	1.29 - 2.79	320	1.76	1.29	10	1.29	1.49 - 1.59	20	1.53
Necks	1.59	30	1.59				1.49	10	1.49
Smoked Drumsticks	1.99 - 2.39	70	2.28						
Smoked Wings	1.99	70	1.99				1.99	10	1.99
Smoked Necks	1.99	70	1.99				1.69 - 1.99	20	1.86
GROUND TURKEY:									
Patties	2.98	100	2.98	3.50	30	3.50			
Sausage	2.80 - 3.99	820	3.56	3.27 - 3.99	120	3.60	3.27	100	3.27
85% lean	2.33 - 3.00	980	2.70	2.33 - 2.50	1,150	2.35	1.99 - 3.35	320	2.74
93% lean	3.03 - 3.98	1,600	3.31	2.74 - 3.50	1,770	3.21	2.49 - 3.59	1,050	2.94
Breast (99-100% lean)	3.84 - 5.38	70	4.83				3.58 - 4.99	210	3.79
Rolls (frsh/frz 1 lb.)							1.00 - 2.99	130	1.32
Specialty ^{5/}									
Patties									
93-94% lean	3.99 - 4.99	420	4.02						
Breast	5.99 - 6.99	80	6.45						



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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/}	38.0% of 4,200 sampled outlets			39.7% of 2,800 sampled outlets			36.5% of 1,200 sampled outlets		
Special Rate ^{4/}	9.2% of stores w/ no-price promotions			1.5% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,600			Activity Index = 2,130			Activity Index = 690		
	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	1.09	50	1.09						
" - Toms	1.09	50	1.09						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.29 - 1.59	140	1.49				1.99	10	1.99
Split, bone-in									
Fresh									
Rotisserie				7.99	130	7.99	6.99	20	6.99
Boneless, whole									
Cutlets	4.99	80	4.99						
Cutlets, thin sliced									
Strips									
Tenders	4.99	20	4.99	4.99	10	4.99			
Marinated Tenders	4.19	30	4.19				4.19	20	4.19
Drumsticks									
Thighs				2.29	110	2.29			
Wings				2.29	110	2.29			
Necks									
Smoked Drumsticks									
Smoked Wings	2.49	10	2.49						
Smoked Necks									
GROUND TURKEY:									
Patties				2.99 - 3.99	240	3.93	3.99	70	3.99
Sausage				2.99 - 3.27	490	3.27	3.27	70	3.27
85% lean	2.49 - 3.20	230	2.92	2.66 - 3.19	180	2.70	3.19 - 3.20	100	3.19
93% lean	2.50 - 3.99	650	3.26	3.19 - 4.79	630	3.40	2.80 - 3.19	280	3.01
Breast (99-100% lean)	3.58 - 4.99	170	4.56	3.99	110	3.99	4.39 - 5.42	100	4.79
Rolls (frsh/frz 1 lb.)	1.00 - 1.59	20	1.32	2.50	10	2.50			
Specialty ^{5/}									
Patties									
93-94% lean	3.99	140	3.99				3.99	10	3.99
Breast	4.99	10	4.99				4.99	10	4.99



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 02/07 thru 02/13.

(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		87.6% of 4,700 sampled outlets Activity Index = 13,420			78.4% of 5,900 sampled outlets Activity Index = 13,900		
Feature Rate ^{1/}	76.6% of 22,900 stores		73.5% of 22,900 stores		79.8% of 23,200 stores							
Activity Index ^{2/}	50,120		43,910		52,280							
	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	3,830	7.40	5,150	8.17	5,880	8.38	5.99 - 8.99	1,140	7.41	6.49 - 8.99	1,470	7.25
Private Brand	2,710	7.35	2,710	7.14	2,130	7.60	6.47 - 7.99	2,130	7.41	6.99	180	6.99
Category 2												
Processor Brand	3,460	5.87	4,590	5.73	5,420	6.00	4.98 - 6.99	1,000	5.66	5.48 - 6.99	700	5.97
Private Brand	5,190	6.72	1,030	6.17	3,530	7.02	4.99 - 7.99	1,130	6.13	5.99 - 7.99	1,220	6.80
Category 3												
Processor Brand	1,490	4.04	730	3.81	1,090	3.87	3.49 - 4.99	980	4.11	2.99 - 3.99	110	3.66
Private Brand	90	5.33	40	4.98	50	5.18	4.99 - 5.48	60	5.34			
Turkey Ham												
Processor Brand	530	4.14	130	3.93	240	4.85	3.49 - 4.99	460	4.19	4.99	20	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	350	4.54	230	3.85	730	4.33	3.79 - 4.99	200	4.71	2.99 - 4.99	50	4.01
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,500	7.80	3,840	7.14	3,220	7.65	5.99 - 9.99	1,410	7.74	5.99 - 8.99	1,370	8.00
Private Brand	850	7.23	1,400	6.39	900	7.12	7.99	240	7.99	6.99	430	6.99
Category 2												
Processor Brand	160	5.26	270	5.03	310	5.67				5.99	20	5.99
Private Brand	260	5.99	150	5.99	240	5.45	5.99	60	5.99			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,170	2.99	9,440	3.00	9,270	2.99	1.98 - 4.00	1,030	2.95	1.97 - 3.69	2,690	3.02
Private Brand	3,300	2.60	1,730	2.61	4,180	2.65	2.48 - 3.33	750	2.72	2.39 - 2.50	790	2.50
Turkey 16 oz												
Processor Brand	1,820	5.07	1,760	5.19	1,810	4.40	4.79 - 5.99	980	5.27	4.99 - 5.49	390	5.06
Private Brand	1,290	4.40					3.69	70	3.69	4.50	1,070	4.50
Chicken 7-10 oz												
Processor Brand	8,890	3.00	9,040	2.99	9,100	3.00	1.98 - 4.00	1,030	2.95	2.29 - 3.69	2,620	3.04
Private Brand	3,230	2.59	1,670	2.60	4,180	2.65	2.48 - 3.33	750	2.72	2.39 - 2.50	770	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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	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)		
	77.8% of 4,200 sampled outlets			69.8% of 4,200 sampled outlets			65.8% of 2,800 sampled outlets			68.9% of 1,200 sampled outlets		
	Activity Index = 8,730			Activity Index = 7,140			Activity Index = 4,520			Activity Index = 2,410		
Feature Rate ^{1/}	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
Activity Index ^{2/}												
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.98	- 8.99	550 7.45	6.99	- 10.99	330 7.91	6.99	- 9.49	310 7.23	6.99	- 12.99	30 9.02
Private Brand	6.99	- 7.99	170 7.59	5.99	- 7.49	230 6.90						
Category 2												
Processor Brand	4.99	- 6.99	1,120 5.92	4.99	- 6.99	580 6.00				5.99		60 5.99
Private Brand	4.99	- 7.99	820 6.43	5.49	- 7.99	760 7.59	5.99	- 7.99	590 7.05	5.99	- 7.99	670 6.67
Category 3												
Processor Brand	2.99	- 4.49	180 4.03	3.49	- 4.49	200 3.99	2.99		20 2.99			
Private Brand						10 3.99				5.99		20 5.99
Turkey Ham												
Processor Brand				3.29	- 3.39	20 3.35	2.49	- 3.99	30 3.40			
Private Brand												
Turkey Pastrami												
Processor Brand	4.29		90 4.29	5.98		10 5.98						
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.95	- 7.49	320 6.93	6.99	- 8.99	270 7.52	7.99		20 7.99	6.99	- 11.99	110 9.15
Private Brand	5.98	- 6.99	30 6.52	5.99	- 7.99	150 6.85						
Category 2												
Processor Brand	4.49	- 5.99	140 5.16									
Private Brand		5.99	200 5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98	- 3.99	1,670 2.78	1.99	- 2.52	1,780 2.94	2.49	- 3.99	1,410 3.17	2.50	- 3.50	590 3.25
Private Brand	2.50	- 3.69	690 2.59	2.50		510 2.50	2.50	- 2.99	390 2.67	2.50	- 2.99	170 2.82
Turkey 16 oz												
Processor Brand	3.99	- 4.99	340 4.81	3.99	- 4.99	110 4.14						
Private Brand		3.98	150 3.98									
Chicken 7-10 oz												
Processor Brand	1.98	- 3.99	1,620 2.78	1.99	- 2.59	1,670 2.96	2.49	- 3.99	1,360 3.19	2.50	- 3.50	590 3.25
Private Brand	2.50	- 3.69	640 2.53	2.50		510 2.50	2.50	- 2.99	390 2.67	2.50	- 2.99	170 2.82

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)