



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/21 thru 02/27.

Fri. Feb 21, 2014

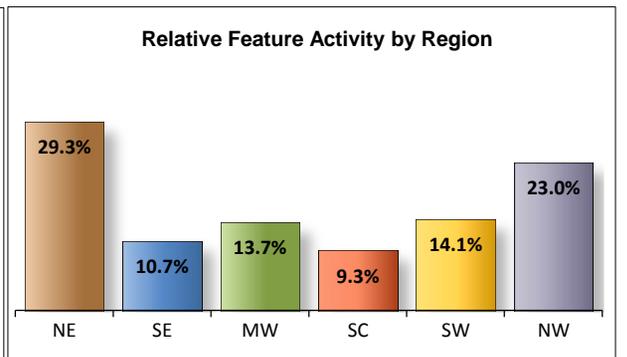
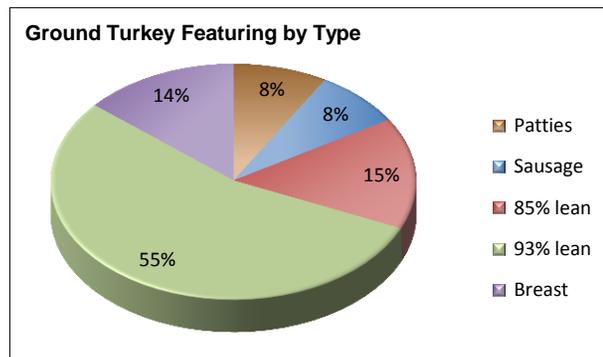
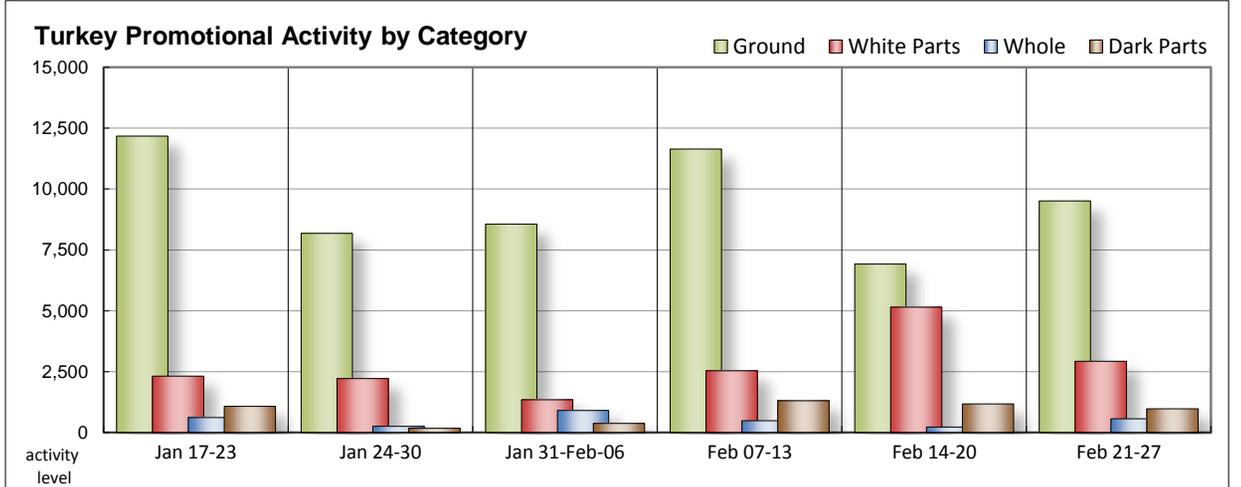
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	44.8% of 22,900 outlets		42.3% of 22,900 outlets		42.0% of 23,200 outlets	
Special Rate ^{4/}	2.9%		3.1%		2.8%	
Activity Index ^{2/}	15,910		13,610		12,710	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	450	0.95	120	1.14	10	1.14
" - Toms	120	0.92	110	1.15	10	1.14
PARTS:						
Breast:						
Bone-in, whole						
Fresh	90	2.96	20	2.84	20	2.79
Frozen	910	1.63	1,200	1.66	730	1.99
Split, bone-in						
Fresh	10	2.49	10	2.49	10	2.49
Rotisserie	420	7.43	340	8.75	30	8.52
Boneless, whole	170	5.97	10	3.99	40	3.99
Cutlets	990	5.11	1,270	5.01	330	4.96
Cutlets, thin sliced					60	5.18
Strips					130	4.99
Tenders	300	4.68	140	4.93	320	4.39
Marinated Tenders	40	4.79	2,160	4.71	260	4.11
Drumsticks	420	1.82	290	1.81	240	1.55
Thighs	250	1.89	20	2.34	110	1.77
Wings	230	1.90	230	2.21	260	1.82
Necks	10	1.29	30	1.36	200	1.51
Smoked Drumsticks	20	1.99	210	2.39	60	1.99
Smoked Wings	30	1.99	200	2.07	120	1.99
Smoked Necks	20	1.99	200	2.07	120	1.92
GROUND TURKEY:	9,510	3.52	6,920	3.26	9,140	3.51
Patties	800	3.67	230	3.43	450	3.39
Sausage	750	3.31	550	3.27	1,540	3.60
85% lean	1,460	2.70	1,790	2.55	1,370	2.68
93% lean	5,180	3.40	3,120	3.22	4,170	3.36
Breast	1,320	4.78	1,230	4.48	1,610	4.53
Rolls (frsh/frz 1 lb.)	60	2.40	10	1.50	340	2.43
Specialty ^{5/}						
Patties	10	4.29			130	4.49
93-94% lean	440	4.05	120	3.48	30	4.49
Breast	1,410	6.08			10	5.99

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

This Week's Turkey Feature Highlights

Feature activity increases as more stores promote ground turkey going into the end of the month. There is some attractive pricing on frozen hens and toms; promotions on hens are more active. Offerings slow on frozen bone-in breasts, although they are still actively promoted; prices are lower. Rotisserie breasts are more getting more space in this week's ads; prices are sharply lower. Offerings decline on boneless white parts as marinated tenders all but disappear from this week's circulars; most ads focused on cutlets at higher prices. Featuring increases on fresh dark parts, declines on smoked items; overall there are fewer ads on dark parts. The big increase comes as stores more actively promote ground turkey, especially the 93% lean grinds. The weighted average price is higher on all grinds. Promotions on specialty grinds are more active due to increased featuring on ground breast. Deli feature activity slows on both service deli and self-service deli items. Prices on service deli were mostly higher on processor brands, lower on private brands. Prices on self-service were mostly higher.



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/}	63.9% of 4,700 sampled outlets 2.3% of stores w/ no-price promotions Activity Index = 5,800			44.4% of 5,900 sampled outlets 3.8% of stores w/ no-price promotions Activity Index = 2,900			34.6% of 4,200 sampled outlets 2.8% of stores w/ no-price promotions Activity Index = 2,460		
	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	0.79 - 0.99	70	0.81				0.88 - 1.29	250	0.97
" - Toms	0.79 - 0.99	70	0.81				1.09 - 1.19	40	1.11
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49 - 2.99	90	2.96						
Frozen	1.47 - 1.99	90	1.70	1.49 - 1.58	240	1.49	0.98 - 1.99	230	1.71
Split, bone-in									
Fresh	2.49	10	2.49						
Rotisserie	5.99 - 7.99	210	6.69	7.99	20	7.99	9.99	20	9.99
Boneless, whole	5.49 - 5.99	170	5.97						
Cutlets	3.99 - 5.99	500	5.23	4.99	430	4.99	4.99	10	4.99
Cutlets, thin sliced									
Strips									
Tenders	4.79	220	4.79				3.99 - 4.49	80	4.36
Marinated Tenders	4.79	40	4.79						
Drumsticks	1.59 - 2.49	260	1.88	1.59	40	1.59	1.49 - 1.78	120	1.75
Thighs	1.99 - 2.49	50	2.31				1.78 - 1.79	200	1.78
Wings	1.98 - 2.49	120	2.04				1.29 - 1.78	110	1.75
Necks							1.29	10	1.29
Smoked Drumsticks	1.99 -	20	1.99						
Smoked Wings	1.99	20	1.99				1.99	10	1.99
Smoked Necks	1.99	20	1.99						
GROUND TURKEY:									
Patties	2.99 - 4.48	510	3.61	2.88 - 3.50	20	3.32	2.88 - 3.99	230	3.79
Sausage	2.87 - 4.09	740	3.32						
85% lean	2.22 - 3.00	560	2.69	2.29 - 2.50	210	2.48	2.00 - 2.99	190	2.47
93% lean	3.06 - 3.99	1,090	3.32	2.73 - 3.54	1,400	3.17	2.48 - 4.00	540	3.20
Breast (99-100% lean)	3.76 - 5.38	740	4.66	4.61 - 4.99	490	4.95	3.73 - 3.99	10	3.87
Rolls (frsh/frz 1 lb.)							2.29 - 2.99	20	2.75
Specialty ^{5/}									
Patties	4.29	10	4.29						
93-94% lean	3.99 - 5.99	70	4.37	3.99	10	3.99	3.99	360	3.99
Breast	5.99 - 6.49	120	6.32	6.49	40	6.49	5.19 - 5.99	30	5.74



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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/}	27.6% of 4,200 sampled outlets			45.6% of 2,800 sampled outlets			65.7% of 1,200 sampled outlets		
Special Rate ^{4/}	1.7% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			12.2% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,670			Activity Index = 1,840			Activity Index = 1,240		
	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	0.88 - 0.99	130	0.98						
" - Toms	0.88	10	0.88						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.18 - 1.69	190	1.46	1.99	10	1.99	1.69 - 1.99	150	1.85
Split, bone-in									
Fresh									
Rotisserie	7.99	90	7.99	7.99	80	7.99			
Boneless, whole									
Cutlets	4.99	50	4.99						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.99	40	3.99						
Sausage				2.99	10	2.99			
85% lean	2.50 - 3.00	160	2.96	2.39 - 3.19	190	2.94	2.00 - 3.19	150	2.76
93% lean	2.80 - 4.00	540	3.70	2.39 - 4.15	1,000	3.50	3.19 - 4.00	610	3.81
Breast (99-100% lean)	4.99 - 5.00	80	4.99						
Rolls (frsh/frz 1 lb.)	1.99 - 2.50	40	2.22						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast	5.19 - 6.49	340	6.03	5.19 - 6.49	550	5.83	5.19 - 6.49	330	6.45



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 02/21 thru 02/27.

(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		83.7% of 4,700 sampled outlets			79.3% of 5,900 sampled outlets		
Feature Rate ^{1/}	72.9% of 22,900 stores		76.7% of 22,900 stores		48.3% of 23,200 stores		Activity Index = 14,390			Activity Index = 11,190		
Activity Index ^{2/}	45,000		50,600		34,550		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	5,840	8.09	6,950	7.98	4,110	7.88	6.88 - 10.99	2,570	7.67	6.99 - 8.99	1,530	8.81
Private Brand	2,750	7.26	780	7.37	2,900	7.75	6.47 - 9.99	2,030	7.11			
Category 2												
Processor Brand	3,910	5.75	5,010	5.69	4,180	5.74	4.98 - 6.99	1,460	5.75	4.99 - 5.99	280	5.60
Private Brand	1,110	5.86	5,010	6.38	3,640	6.37	4.99 - 5.99	560	5.95	5.99	110	5.99
Category 3												
Processor Brand	960	4.02	960	3.99	950	3.84	2.99 - 4.99	770	3.98	3.99	30	3.99
Private Brand	1,180	5.01	60	4.82			4.99 - 5.48	170	5.12	4.99	1,010	4.99
Turkey Ham												
Processor Brand	500	3.92	160	3.57	440	3.94	2.99 - 4.99	440	4.04	2.99	40	2.99
Private Brand												
Turkey Pastrami												
Processor Brand	260	3.68	290	4.16	400	4.49	3.49 - 4.99	240	3.57			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,300	8.07	3,270	7.91	2,650	7.63	5.99 - 9.99	1,140	8.63	5.99 - 8.99	190	8.72
Private Brand	650	6.99	2,190	7.90	730	7.56	6.99	400	6.99			
Category 2												
Processor Brand	220	5.70	260	5.99	110	5.04	5.99	140	5.99			
Private Brand	1,330	5.15	360	5.38	400	5.84	4.99	100	4.99	4.99	1,010	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,130	3.03	8,680	2.85	4,540	3.10	2.29 - 3.99	1,490	3.11	2.35 - 3.69	2,860	3.03
Private Brand	1,060	2.73	2,010	2.59	2,200	2.82	2.50 - 3.49	730	2.57	2.33 - 2.50	80	2.46
Turkey 16 oz												
Processor Brand	2,050	4.63	4,680	4.79	1,050	5.70	3.99 - 4.78	160	4.30	4.00 - 5.69	1,150	4.65
Private Brand												
Chicken 7-10 oz												
Processor Brand	9,690	3.04	8,140	2.85	4,140	3.16	2.50 - 3.99	1,260	3.15	2.50 - 3.69	2,820	3.03
Private Brand	1,060	2.73	1,790	2.67	2,110	2.83	2.50 - 3.49	730	2.57	2.33 - 2.50	80	2.46

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)		
	72.9% of 4,200 sampled outlets			61.5% of 4,200 sampled outlets			52.8% of 2,800 sampled outlets			85.4% of 1,200 sampled outlets		
	Activity Index = 8,180			Activity Index = 5,770			Activity Index = 3,160			Activity Index = 2,310		
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	5.95 - 9.99	830	7.42	6.99 - 10.49	520	8.22	7.99 - 9.99	290	9.85	6.99 - 12.99	100	7.76
Private Brand	6.99 - 10.99	470	7.31	6.99 - 7.99	120	7.20	9.49	130	9.49			
Category 2												
Processor Brand	4.98 - 6.99	930	6.03	4.99 - 5.99	420	5.70	4.99 - 6.49	600	5.41	4.99 - 6.99	220	5.77
Private Brand	4.99 - 5.99	230	5.96	5.00 - 5.99	210	5.42						
Category 3												
Processor Brand	2.99 - 4.88	140	4.24	3.69 - 4.49	20	4.19						
Private Brand	4.99		4.99									
Turkey Ham												
Processor Brand							3.29 - 3.39	20	3.33			
Private Brand												
Turkey Pastrami												
Processor Brand	4.98	20	4.98									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 7.99	410	6.50	5.99 - 9.49	310	7.78	7.99	20	7.99	5.99 - 7.99	230	7.91
Private Brand	6.99	250	6.99									
Category 2												
Processor Brand	4.49 - 5.99	80	5.20									
Private Brand	4.99 - 5.99	180	5.97	5.99	40	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.49 - 3.50	2,170	2.81	1.99 - 2.77	1,860	3.08	2.50 - 3.50	890	3.10	2.50 - 3.99	860	3.30
Private Brand	2.50 - 3.69	130	2.65	3.22 - 3.99	120	3.95						
Turkey 16 oz												
Processor Brand	3.99 - 4.49	50	4.34	3.99 - 4.99	330	4.76	3.99 - 4.99	320	4.58	4.99	40	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.49 - 3.50	2,160	2.81	1.99 - 2.77	1,700	3.13	2.50 - 3.50	890	3.10	2.50 - 3.99	860	3.30
Private Brand	2.50 - 3.69	130	2.65	3.99	120	3.99						

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)