



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/28 thru 03/06.

Fri. Feb 28, 2014

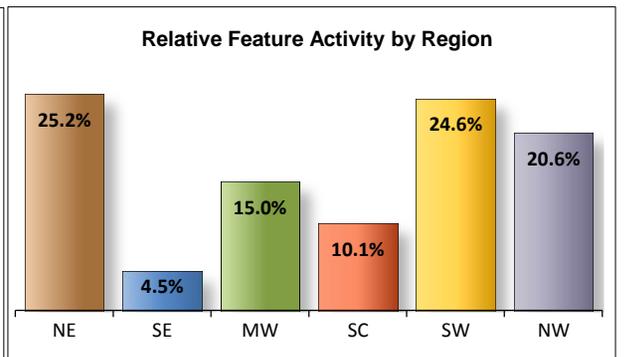
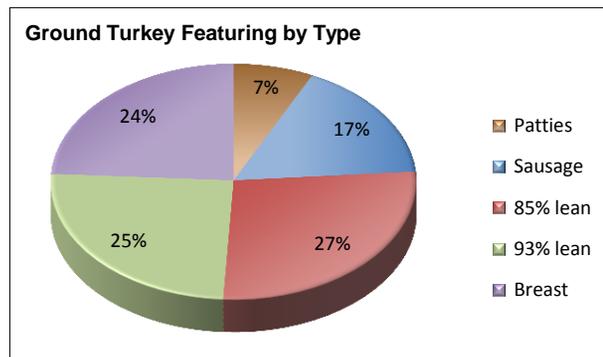
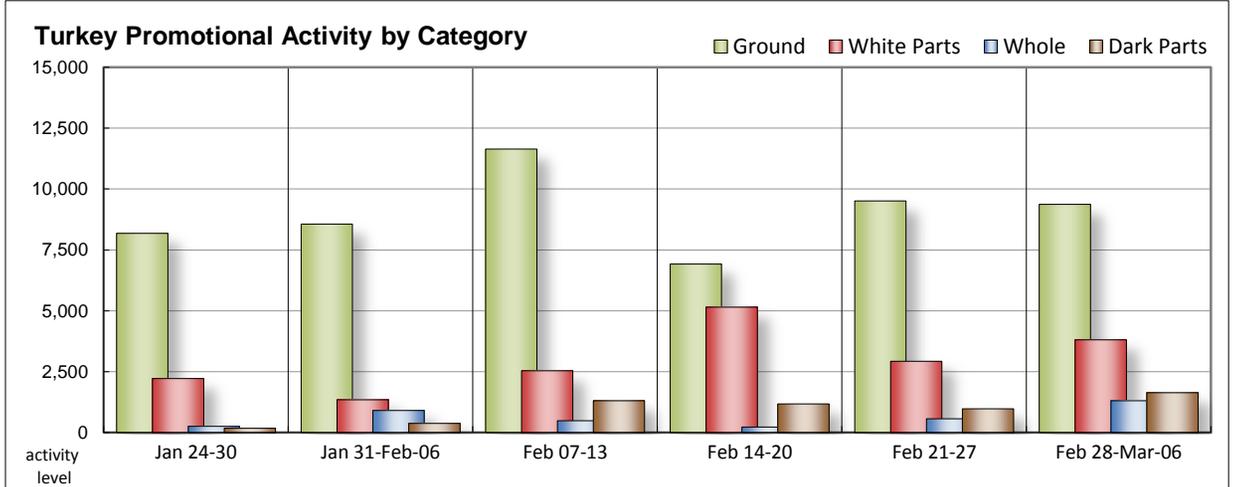
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	45.2% of 22,900 outlets		44.8% of 22,900 outlets		34.2% of 23,200 outlets	
Special Rate ^{4/}	1.0%		2.9%		0.1%	
Activity Index ^{2/}	19,690		15,910		13,140	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	710	1.16	450	0.95	370	1.25
" - Toms	600	1.04	120	0.92	370	1.25
PARTS:						
Breast:						
Bone-in, whole						
Fresh	120	2.99	90	2.96	10	2.49
Frozen	1,920	1.80	910	1.63	700	1.73
Split, bone-in						
Fresh			10	2.49		
Rotisserie	140	5.99	420	7.43	2,470	8.27
Boneless, whole	50	5.19	170	5.97		
Cutlets	410	5.21	990	5.11	20	3.99
Cutlets, thin sliced	240	4.99			130	4.99
Strips	230	5.45				
Tenders	250	4.75	300	4.68	90	4.32
Marinated Tenders	450	4.22	40	4.79	110	4.76
Drumsticks	480	2.14	420	1.82	170	2.05
Thighs	230	2.51	250	1.89	40	2.58
Wings	480	2.14	230	1.90	190	2.32
Necks	130	1.72	10	1.29	20	1.39
Smoked Drumsticks	110	2.37	20	1.99	60	1.93
Smoked Wings	110	2.18	30	1.99	60	1.92
Smoked Necks	100	2.14	20	1.99	20	1.74
GROUND TURKEY:	9,370	3.49	9,510	3.52	7,740	3.47
Patties	670	3.80	800	3.67	550	3.93
Sausage	1,560	3.45	750	3.31	1,540	3.47
85% lean	2,540	2.63	1,460	2.70	1,310	2.35
93% lean	2,340	3.21	5,180	3.40	2,770	3.25
Breast	2,260	4.90	1,320	4.78	1,570	4.83
Rolls (frsh/frz 1 lb.)	840	2.43	60	2.40	120	1.00
Specialty ^{5/}						
Patties			10	4.29		
93-94% lean	1,480	4.18	440	4.05	390	4.27
Breast	1,240	6.48	1,410	6.08	60	5.89

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

This Week's Turkey Feature Highlights

Retail feature activity increases, even with the start of Lenten specials appearing in the ads. More stores are featuring frozen hens and toms; prices are higher. Promotional activity on frozen bone-in breasts more than doubles, but they will cost more this week. There doesn't seem to be much enthusiasm for featuring rotisserie breasts. Boneless white parts are fully represented in the circulars; marinated tenders are the best value for shoppers watching their budget. Offerings increase on fresh and smoked dark parts; prices are higher. Featuring slows on ground turkey; consumers will find a more balanced spread of feature activity on the 85%, 93% and ground breast. Specialty grinds continue to gain space in the circulars. Deli feature activity slows; increased featuring on self-service deli is not enough to make up for the drop in service deli promotions. Service deli offerings slow on thick slicing meats, increase on thin slicing meats. More stores are promoting private brands in the self-service deli category; prices are 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/}	76.0% of 4,700 sampled outlets 0.8% of stores w/ no-price promotions Activity Index = 6,530			18.0% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,580			46.0% of 4,200 sampled outlets 3.1% of stores w/ no-price promotions Activity Index = 3,530		
	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 - 1.49	190	1.14				0.99 - 1.29	180	1.00
" - Toms	0.99 - 1.49	190	1.14				0.99 - 1.29	180	1.00
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	10	2.99						
Frozen	1.19 - 1.99	480	1.75	1.59	10	1.59	0.99 - 1.99	810	1.72
Split, bone-in									
Fresh									
Rotisserie	5.99	140	5.99						
Boneless, whole	4.99 - 5.49	50	5.19						
Cutlets	3.99 - 5.99	180	4.91						
Cutlets, thin sliced	4.99 - 5.00	240	4.99						
Strips									
Tenders							3.99	10	3.99
Marinated Tenders	3.73 - 4.26	340	4.22				4.66	20	4.66
Drumsticks	1.79 - 2.49	90	1.90				1.29 - 2.39	150	1.78
Thighs	1.99 - 2.49	90	2.07	1.39	10	1.39	2.39	20	2.39
Wings	1.79 - 2.49	90	1.90				1.29 - 2.39	150	1.78
Necks							1.29 - 1.79	130	1.72
Smoked Drumsticks	2.69 -	50	2.69				1.99 - 2.99	20	2.30
Smoked Wings	2.29	50	2.29				1.99 - 2.99	20	2.30
Smoked Necks	2.29	50	2.29				1.99	10	1.99
GROUND TURKEY:									
Patties	2.99 - 4.49	400	4.02	3.48 - 3.50	230	3.48	3.50 - 3.89	30	3.63
Sausage	3.19 - 4.99	790	3.53	3.19 - 4.99	320	3.72	3.19 - 4.99	140	3.81
85% lean	2.33 - 2.99	1,200	2.66	2.50 - 2.66	140	2.57	1.99 - 3.49	420	2.63
93% lean	2.80 - 3.84	1,230	3.21	2.80 - 3.33	220	3.04	2.74 - 3.49	230	2.98
Breast (99-100% lean)	3.84 - 5.59	360	4.60	3.84 - 4.61	250	3.97	3.99 - 5.19	100	4.09
Rolls (frsh/frz 1 lb.)				2.88	20	2.88	2.49 - 2.99	300	2.79
Specialty ^{5/}									
Patties									
93-94% lean	3.59 - 4.99	310	4.27	3.99	380	3.99	3.99 - 4.99	600	4.20
Breast							6.49	10	6.49



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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/}	34.7% of 4,200 sampled outlets			63.7% of 2,800 sampled outlets			50.4% of 1,200 sampled outlets		
Special Rate ^{4/}	1.1% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.4% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,380			Activity Index = 4,210			Activity Index = 1,460		
	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				0.99	230	0.99	1.79	110	1.79
" - Toms				0.99	230	0.99			
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.99	110	2.99
Frozen	1.48 - 1.99	350	1.92	1.99	250	1.99	1.78 - 1.79	20	1.78
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets				5.45	230	5.45			
Cutlets, thin sliced									
Strips				5.45	230	5.45			
Tenders	4.49	10	4.49	4.79	230	4.79			
Marinated Tenders	4.19	30	4.19				3.99 - 4.19	60	4.06
Drumsticks				1.99	130	1.99	2.99	110	2.99
Thighs							2.99	110	2.99
Wings				1.99	130	1.99	2.99	110	2.99
Necks									
Smoked Drumsticks				1.99	40	1.99			
Smoked Wings				1.99	40	1.99			
Smoked Necks				1.99	40	1.99			
GROUND TURKEY:									
Patties	2.99	10	2.99						
Sausage	3.43 - 4.99	20	4.28	2.45 - 4.99	290	2.69			
85% lean	2.66 - 2.99	200	2.87	2.00 - 3.19	540	2.50	2.00 - 2.99	40	2.80
93% lean	2.66 - 3.50	460	3.30	3.19 - 3.59	120	3.45	3.19 - 3.99	80	3.36
Breast (99-100% lean)	4.39 - 5.59	570	5.18	4.79 - 5.35	620	5.17	4.39 - 5.19	360	5.13
Rolls (frsh/frz 1 lb.)	0.99 - 2.99	210	2.49	1.99 - 2.50	310	2.01			
Specialty ^{5/}									
Patties									
93-94% lean	3.99 - 5.99	180	4.38				4.49	10	4.49
Breast	6.49	340	6.49	6.49	550	6.49	5.49 - 6.49	340	6.46



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 02/28 thru 03/06.

(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		81.1% of 4,700 sampled outlets Activity Index = 15,990			70.2% of 5,900 sampled outlets Activity Index = 9,020		
Feature Rate ^{1/}	63.7% of 22,900 stores		72.9% of 22,900 stores		71.5% of 23,200 stores		Price Range (\$/pound)			Price Range (\$/pound)		
Activity Index ^{2/}	43,340		45,000		40,630		Summary Stores Wtd Avg			Summary Stores Wtd Avg		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	3,930	8.05	5,840	8.09	4,200	7.75	6.48 - 10.99	1,690	8.23	7.99 - 8.99	450	8.60
Private Brand	1,880	7.42	2,750	7.26	3,430	7.37	6.99 - 8.99	810	7.20			
Category 2												
Processor Brand	4,240	5.97	3,910	5.75	2,730	5.81	4.99 - 5.99	1,510	5.82	5.99 - 6.98	1,020	6.61
Private Brand	2,500	6.47	1,110	5.86	2,620	6.59	4.99 - 6.99	1,650	6.58	4.99 - 6.99	270	6.79
Category 3												
Processor Brand	1,290	3.85	960	4.02	1,250	4.17	3.49 - 4.99	750	4.03	3.99	60	3.99
Private Brand	70	4.29	1,180	5.01	1,450	4.96	3.99 - 4.48	70	4.29			
Turkey Ham												
Processor Brand	200	3.52	500	3.92	240	3.45	3.99 - 4.49	40	4.20			
Private Brand					40	3.98						
Turkey Pastrami												
Processor Brand	80	3.95	260	3.68	260	3.93	3.79 - 4.49	60	4.02			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,820	7.69	2,300	8.07	1,890	7.44	5.98 - 9.99	1,820	7.92	5.99 - 8.99	200	7.03
Private Brand	1,860	6.76	650	6.99	2,360	6.86	5.99 - 6.99	1,110	6.20	6.99	80	6.99
Category 2												
Processor Brand	210	4.91	220	5.70	310	5.46	4.99	180	4.99			
Private Brand	190	5.87	1,330	5.15	1,370	5.05						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,240	3.08	10,130	3.03	8,200	3.01	2.49 - 4.00	2,590	3.17	1.97 - 3.99	2,140	3.12
Private Brand	2,740	3.11	1,060	2.73	640	3.17	2.48 - 3.39	620	2.92	2.50 - 3.50	1,560	3.35
Turkey 16 oz												
Processor Brand	940	4.99	2,050	4.63	1,370	4.90			4.99		10	4.99
Private Brand	40	3.99										
Chicken 7-10 oz												
Processor Brand	8,950	3.09	9,690	3.04	7,610	3.00	2.49 - 4.00	2,540	3.15	1.99 - 3.99	2,110	3.14
Private Brand	2,160	3.05	1,060	2.73	660	3.16	2.48 - 3.39	540	2.96	2.50 - 3.33	1,120	3.30

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)		
	66.9% of 4,200 sampled outlets			50.3% of 4,200 sampled outlets			43.3% of 2,800 sampled outlets			46.1% of 1,200 sampled outlets		
	Activity Index = 8,240			Activity Index = 5,930			Activity Index = 2,630			Activity Index = 1,530		
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	6.49 - 8.99	550	7.62	5.99 - 7.99	900	7.63	6.49 - 8.99	90	7.83	6.99 - 10.99	250	8.36
Private Brand	6.99 - 10.99	190	8.05	6.99 - 8.99	560	7.35	6.99 - 8.99	320	7.75			
Category 2												
Processor Brand	4.99 - 6.99	900	6.15	4.99 - 6.99	540	5.20	4.99 - 5.49	180	5.02	4.98 - 6.99	90	5.96
Private Brand	5.98 - 6.29	70	6.02	5.99	70	5.99				5.99	440	5.99
Category 3												
Processor Brand	2.99 - 4.49	420	3.51	3.99	50	3.99				3.98	10	3.98
Private Brand												
Turkey Ham												
Processor Brand	3.49	20	3.49	2.39 - 3.29	50	2.84	2.69 - 3.99	90	3.60			
Private Brand												
Turkey Pastrami												
Processor Brand	3.49	10	3.49							3.99	10	3.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.95 - 8.99	470	7.32	5.99 - 9.49	280	6.95	7.99	20	7.99	8.99 - 11.99	30	10.16
Private Brand	6.99 - 8.99	150	7.08	6.99 - 8.99	290	7.68	7.99	230	7.99			
Category 2												
Processor Brand	3.49 - 4.98	30	4.44									
Private Brand	4.99 - 5.99	190	5.87									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98 - 3.99	2,270	2.87	1.99 - 2.50	1,190	3.13	2.00 - 3.99	700	3.13	2.50 - 3.79	350	3.33
Private Brand	2.48 - 3.29	220	2.66	2.50 - 3.50	340	2.66						
Turkey 16 oz												
Processor Brand	4.49 - 5.79	330	4.96	3.99 - 4.99	300	4.68	4.49 - 5.99	300	5.34			
Private Brand	3.99	30	3.99									
Chicken 7-10 oz												
Processor Brand	1.98 - 3.99	2,170	2.88	1.99 - 2.50	1,080	3.19	2.00 - 3.99	700	3.13	2.50 - 3.79	350	3.33
Private Brand	2.48 - 3.29	220	2.66	2.50	280	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)