



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/14 thru 03/20.

Fri. Mar 14, 2014

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

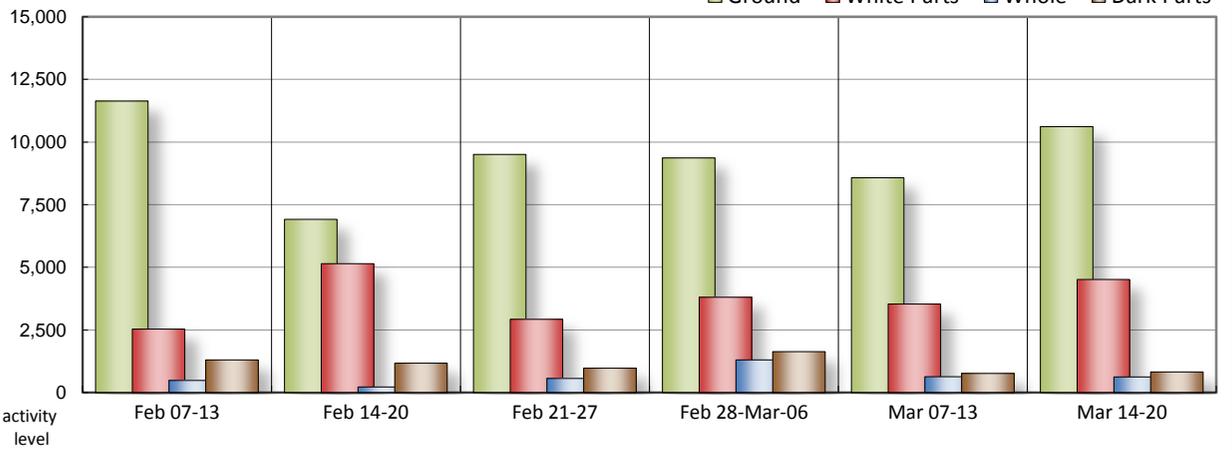
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	48.5% of 22,900 outlets		44.1% of 22,900 outlets		40.0% of 23,200 outlets	
Special Rate ^{4/}	1.1%		5.7%		1.8%	
Activity Index ^{2/}	18,860		17,780		14,480	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					150	1.71
" - Toms					140	1.69
Frozen - Hens	320	0.92	320	0.99	420	1.20
" - Toms	310	0.91	320	0.99	360	1.17
PARTS:						
Breast:						
Bone-in, whole						
Fresh	110	2.42	30	2.99	170	3.33
Frozen	1,610	1.63	1,350	1.81	2,170	1.63
Split, bone-in						
Fresh						
Rotisserie	350	7.28	720	8.39	540	6.83
Boneless, whole	20	6.97	70	5.56	20	4.99
Cutlets	230	5.04	320	5.08	520	5.15
Cutlets, thin sliced	10	5.99				
Strips						
Tenders	40	4.86	150	4.58	420	4.79
Marinated Tenders	2,150	4.71	900	4.56	300	4.44
Drumsticks	210	1.87	160	1.76	90	1.88
Thighs	130	1.84	130	1.86	110	1.82
Wings	250	2.12	40	1.72	80	1.96
Necks	110	1.73	120	1.77	50	1.99
Smoked Drumsticks	110	2.48	70	2.14	20	1.99
Smoked Wings	10	2.40	160	2.05	20	1.99
Smoked Necks	10	2.40	90	2.10	20	1.99
GROUND TURKEY:						
	10,620	3.46	8,580	3.38	8,350	3.57
Patties	850	3.50	940	3.70	1,340	3.52
Sausage	620	3.37	1,610	3.44	590	3.45
85% lean	2,890	2.55	1,910	2.72	1,000	2.81
93% lean	3,860	3.30	3,020	3.25	3,260	3.21
Breast	2,400	5.02	1,100	4.50	2,160	4.74
Rolls (frsh/frz 1 lb.)	510	2.60	1,700	1.90	420	2.23
Specialty ^{5/}						
Patties	20	3.99	40	4.99		
93-94% lean	440	4.11	1,530	4.56	60	4.52
Breast	1,290	6.50	980	5.04	50	6.19

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

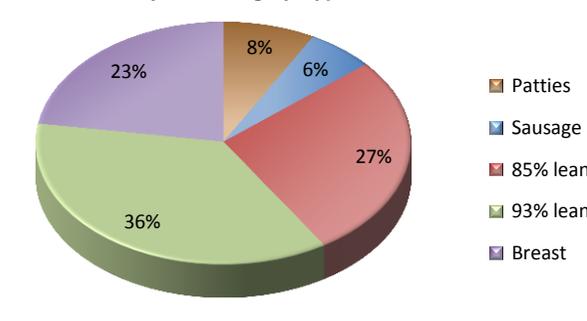
This Week's Turkey Feature Highlights

Feature activity increases going into the middle of the month. The number of ads featuring frozen hens and toms is about the same as last week; the big difference is the lower prices. Retailers are offering more fresh and frozen bone-in breasts and here too prices are lower. Offerings and prices decline on rotisserie breasts. The big difference in featuring on boneless white parts is the large number of ads promoting marinated tenders. Prices trend higher on most of the boneless white parts. Dark parts are fully represented in the circulars; prices are mixed on fresh, higher on smoked parts. Ground turkey feature activity increases; the weighted average price is higher in part due to increased featuring on ground breast and higher prices on 93% lean and ground breast. Deli promotional activity slows on both service deli and self-service deli. Stores increase promotions on private brands and retreat from offerings of processor brands.

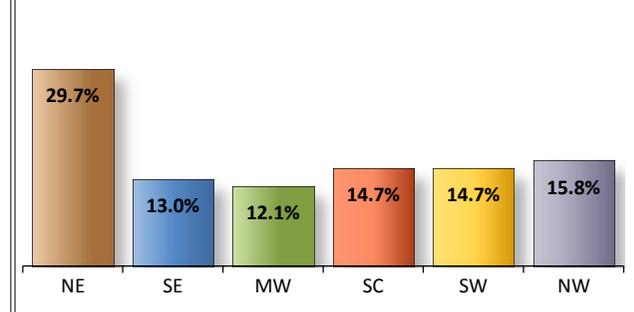
Turkey Promotional Activity by Category



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

	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/}	73.0% of 4,700 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 6,520			39.6% of 5,900 sampled outlets 3.6% of stores w/ no-price promotions Activity Index = 3,910			36.1% of 4,200 sampled outlets 0.5% of stores w/ no-price promotions Activity Index = 2,410		
	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	0.79	120	0.79	0.99	10	0.99
" - Toms	0.99	140	0.99	0.79	120	0.79			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.29 - 2.99	90	2.40						
Frozen	0.99 - 1.99	520	1.81	1.18 - 1.97	240	1.87	1.29 - 1.69	390	1.55
Split, bone-in									
Fresh									
Rotisserie	6.00 - 8.99	350	7.28						
Boneless, whole	6.97	20	6.97						
Cutlets	4.99 - 5.99	180	5.07	4.99	30	4.99	4.48 - 4.99	20	4.83
Cutlets, thin sliced	5.99	10	5.99						
Strips									
Tenders				4.99	30	4.99	4.48	10	4.48
Marinated Tenders	3.73 - 4.99	900	4.40	4.66 - 4.99	1,250	4.93	4.99		4.99
Drumsticks	2.49	10	2.49	1.99	50	1.99	1.49 - 1.99	140	1.75
Thighs	2.49	10	2.49				1.69 - 1.99	120	1.79
Wings	2.49 - 2.99	50	2.86	1.99 - 2.99	60	2.26	1.49 - 1.79	130	1.76
Necks				1.99	50	1.99	1.49 - 1.69	20	1.58
Smoked Drumsticks	-			2.40 - 2.49	110	2.48			
Smoked Wings				2.40	10	2.40			
Smoked Necks				2.40	10	2.40			
GROUND TURKEY:									
Patties	3.49 - 3.99	520	3.50	2.79 - 3.59	130	3.33	2.99 - 3.33	80	3.07
Sausage	2.99 - 3.99	310	3.54	3.19	30	3.19	3.19	20	3.19
85% lean	1.98 - 3.49	870	2.57	2.33 - 2.99	1,410	2.46	1.98 - 3.29	300	2.54
93% lean	2.99 - 3.99	1,320	3.29	2.99 - 3.45	70	3.26	2.91 - 3.75	820	3.17
Breast (99-100% lean)	3.99 - 5.83	640	4.93	3.99 - 4.99	140	4.63	4.16 - 5.19	40	4.36
Rolls (frsh/frz 1 lb.)	3.33	40	3.33	1.50 - 3.33	50	2.13	2.29 - 2.99	180	2.96
Specialty ^{5/}									
Patties	3.99	20	3.99						
93-94% lean	3.99 - 4.99	340	4.15				3.99	100	3.99
Breast	6.99	40	6.99				5.99 - 6.49	30	6.14



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/14 thru 03/20.

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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)		
Feature Rate ^{1/}	42.1% of 4,200 sampled outlets			52.8% of 2,800 sampled outlets			51.2% of 1,200 sampled outlets		
Special Rate ^{4/}	0.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,940			Activity Index = 2,130			Activity Index = 950		
	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	50	0.99						
" - Toms	0.99	50	0.99						
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49	20	2.49						
Frozen	0.99 - 1.69	210	1.19	1.49	250	1.49			
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks	2.29	10	2.29						
Thighs									
Wings	2.29	10	2.29						
Necks	1.49	40	1.49						
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.99	120	3.99			
Sausage	2.79 - 3.49	240	3.06	4.79	20	4.79			
85% lean	2.67 - 2.99	280	2.94	2.39 - 2.79	20	2.64	2.33	10	2.33
93% lean	2.39 - 3.99	950	3.30	2.99 - 3.99	450	3.24	2.79 - 3.99	250	3.84
Breast (99-100% lean)	4.79 - 5.19	670	5.06	4.39 - 5.19	580	5.14	5.19	330	5.19
Rolls (frsh/frz 1 lb.)	2.50 - 2.99	70	2.80	1.99 - 2.50	140	2.03	2.50	30	2.50
Specialty ^{5/}									
Patties									
93-94% lean									
Breast	6.49	340	6.49	6.49	550	6.49	6.49	330	6.49



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats
 Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/14 thru 03/20.
 (prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Mar 14, 2014

	NATIONAL SUMMARY					
	This Week		Last Week		Last Year	
Feature Rate ^{1/}	67.9% of 22,900 stores		70.7% of 22,900 stores		64.1% of 23,200 stores	
Activity Index ^{2/}	45,700		50,720		36,720	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
SERVICE DELI - Turkey						
Category 1						
Processor Brand	5,930	7.61	6,330	7.95	2,740	8.20
Private Brand	2,100	7.48	1,680	7.50	1,680	7.43
Category 2						
Processor Brand	3,640	5.64	4,150	5.82	3,320	6.01
Private Brand	2,770	6.79	3,810	6.63	5,010	7.21
Category 3						
Processor Brand	1,160	4.22	1,230	3.65	1,090	4.54
Private Brand	60	4.98	160	5.11	130	4.32
Turkey Ham						
Processor Brand	370	4.21	310	4.25	450	3.88
Private Brand						
Turkey Pastrami						
Processor Brand	390	3.82	430	4.46	510	4.65
Private Brand						
SERVICE DELI - Chicken						
Category 1						
Processor Brand	2,030	7.57	4,720	7.52	3,070	7.27
Private Brand	2,640	7.66	380	6.49	800	7.41
Category 2						
Processor Brand	60	4.98	320	5.07	310	5.02
Private Brand	10	5.98	20	5.38	170	5.99
SELF-SERVICE DELI (dollars per tub or pouch)						
Turkey 7-10 oz						
Processor Brand	6,910	3.11	11,400	3.21	6,760	3.05
Private Brand	3,780	2.89	2,740	2.86	720	3.20
Turkey 16 oz						
Processor Brand	3,360	5.33	1,660	5.00	2,550	5.02
Private Brand					90	4.49
Chicken 7-10 oz						
Processor Brand	6,750	3.14	10,790	3.21	6,600	3.06
Private Brand	3,740	2.90	590	3.11	720	3.21

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)			
86.6% of 4,700 sampled outlets Activity Index = 18,010				73.0% of 5,900 sampled outlets Activity Index = 9,640			
Price Range (\$/pound)		Summary Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg	
6.99 - 9.49		1,840 7.72		6.99 - 8.99		2,360 7.88	
6.99 - 8.99		1,520 7.41		7.99		60 7.99	
4.49 - 6.99		1,530 5.36		4.99 - 6.99		560 5.80	
4.99 - 6.99		1,850 6.89		6.99		430 6.99	
3.99 - 4.99		570 4.60		3.59 - 4.38		60 3.92	
4.98 - 4.99		60 4.98					
2.99 - 4.99		270 4.48		3.69		30 3.69	
3.49 - 4.99		290 3.65		3.69		30 3.69	
4.99 - 9.99		1,130 8.09		6.99 - 8.99		540 7.30	
6.99 - 7.99		1,170 7.81					
4.97		10 4.97					
2.48 - 3.99		2,360 3.23		2.50 - 3.89		1,120 3.14	
2.48 - 3.33		1,080 2.67		2.50 - 3.33		1,600 3.13	
3.99 - 5.99		1,010 4.96		4.98 - 5.99		140 5.52	
2.48 - 3.99		2,300 3.30		2.75 - 3.89		1,110 3.14	
2.48 - 3.33		1,020 2.68		2.50 - 3.33		1,600 3.13	

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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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)			
	64.3% of 4,200 sampled outlets Activity Index = 8,600				55.0% of 4,200 sampled outlets Activity Index = 5,230				50.7% of 2,800 sampled outlets Activity Index = 2,200			66.7% of 1,200 sampled outlets Activity Index = 2,020			
	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	6.98 - 8.99	740	7.25		6.99 - 9.99	440	7.94		6.49 - 6.99	110	6.95		5.99 - 8.99	440	6.18
Private Brand	6.99 - 10.99	440	7.75		5.99 - 7.49	80	7.05								
Category 2															
Processor Brand	4.95 - 6.99	830	6.20		4.29 - 6.99	330	5.92		4.99	340	4.99		5.49 - 5.99	50	5.61
Private Brand	5.98 - 6.49	180	6.34		4.99 - 6.99	310	6.14								
Category 3															
Processor Brand	3.49 - 3.99	100	3.70		2.99 - 4.99	260	3.80		3.59 - 3.99	150	3.87		4.99	20	4.99
Private Brand															
Turkey Ham															
Processor Brand	2.99 - 3.79	20	3.43		3.29 - 3.69	30	3.56		2.79 - 3.29	20	3.12				
Private Brand															
Turkey Pastrami															
Processor Brand	3.69 - 3.99	60	3.96						8.49	10	8.49				
Private Brand															
SERVICE DELI - Chicken															
Category 1															
Processor Brand	5.98 - 9.99	650	7.15		6.99 - 7.99	50	7.14		8.49	10	8.49		5.99	190	5.99
Private Brand	6.99 - 7.99	290	7.19		6.99 - 7.99	310	7.82						7.99	330	7.99
Category 2															
Processor Brand	4.95 - 4.99	50	4.99												
Private Brand	5.98	10	5.98												
SELF-SERVICE DELI (dollars per tub or pouch)															
Turkey 7-10 oz															
Processor Brand	1.88 - 3.99	2,060	3.05		1.99 - 2.39	930	2.92		2.50 - 3.99	260	3.15		2.50 - 3.29	180	2.88
Private Brand	2.50 - 3.99	530	2.88		2.50 - 3.33	380	2.70		2.50	130	2.50		2.50	60	2.50
Turkey 16 oz															
Processor Brand	3.99 - 5.99	60	4.80		3.69 - 4.98	860	5.06		4.99 - 5.99	780	5.70		5.99	510	5.99
Private Brand															
Chicken 7-10 oz															
Processor Brand	1.88 - 3.99	2,050	3.05		1.99 - 2.39	850	2.95		2.50 - 3.99	260	3.15		2.50 - 3.29	180	2.88
Private Brand	2.50 - 3.99	530	2.88		2.50 - 3.33	400	2.73		2.50	130	2.50		2.50	60	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)