



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/21 thru 03/27.**

Fri. Mar 21, 2014

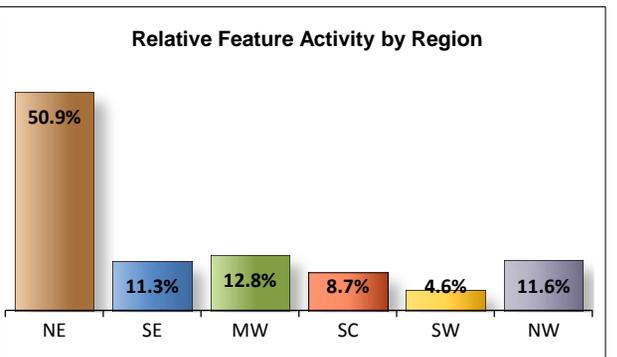
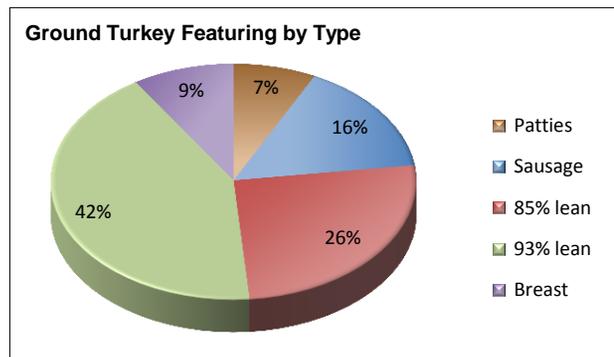
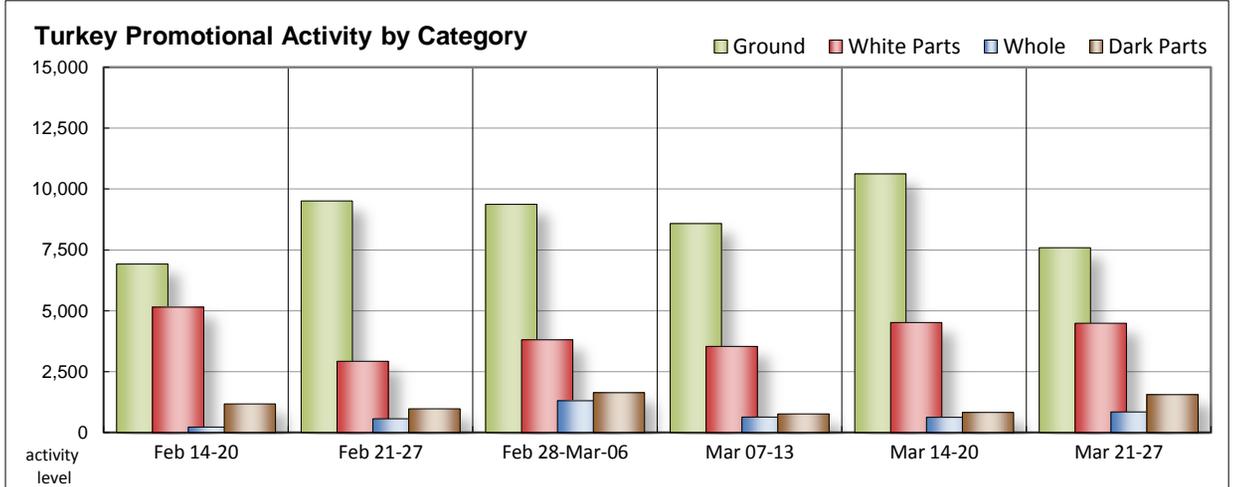
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>41.0% of 22,900 outlets</b>		<b>48.5% of 22,900 outlets</b>		<b>57.2% of 23,200 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>4.5%</b>		<b>1.1%</b>		<b>1.4%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>16,030</b>		<b>18,860</b>		<b>29,580</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					2,280	1.64
" - Toms					2,050	1.64
Frozen - Hens	510	1.03	320	0.92	6,330	1.03
" - Toms	340	0.99	310	0.91	5,950	1.03
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	30	2.66	110	2.42	630	2.98
Frozen	1,770	1.59	1,610	1.63	4,060	1.71
Split, bone-in						
Fresh	60	2.99			20	2.49
Rotisserie	40	8.24	350	7.28	140	8.99
Boneless, whole	160	5.99	20	6.97	30	3.99
Cutlets	1,330	4.82	230	5.04	200	4.72
Cutlets, thin sliced			10	5.99	310	4.39
Strips						
Tenders	670	4.76	40	4.86	70	4.82
Marinated Tenders	430	4.34	2,150	4.71	260	4.14
Drumsticks	450	1.81	210	1.87	40	1.53
Thighs	120	1.78	130	1.84	10	1.59
Wings	330	1.88	250	2.12	30	1.53
Necks	30	1.55	110	1.73	10	1.79
Smoked Drumsticks	220	2.61	110	2.48	50	1.99
Smoked Wings	190	2.31	10	2.40	50	1.99
Smoked Necks	220	2.08	10	2.40		
<b>GROUND TURKEY:</b>	<b>7,590</b>	<b>3.23</b>	<b>10,620</b>	<b>3.46</b>	<b>6,010</b>	<b>3.35</b>
Patties	560	3.82	850	3.50	300	3.68
Sausage	1,180	2.86	620	3.37	140	3.54
85% lean	1,950	2.68	2,890	2.55	1,500	2.66
93% lean	3,210	3.29	3,860	3.30	2,700	3.04
Breast	690	4.73	2,400	5.02	1,370	4.65
Rolls (frsh/frz 1 lb.)	730	2.38	510	2.60	270	2.06
<b>Specialty</b> <sup>5/</sup>						
Patties	10	4.29	20	3.99	10	5.29
93-94% lean	750	3.98	440	4.11	180	3.83
Breast	50	5.89	1,290	6.50	590	5.99

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

**This Week's Turkey Feature Highlights**

Retail activity declines on turkey items as retailers turn their attention to competing proteins, especially fish for Lent. More stores are promoting frozen hens and toms; prices are higher. Offerings increase on frozen bone-in breasts; prices are lower. This year Easter is a few weeks later, so comparisons with the same week last year are a hint of what lies ahead for whole turkeys and bone-in breasts. Rotisserie breasts are all but absent in this week's circulars. Retail feature activity on boneless white parts switches from mostly marinated tenders to mostly cutlets. Prices trend lower on boneless white parts. More stores are advertising dark parts, with fresh drums and wings the most actively promoted; prices are mostly lower this week. Ground turkey ads are less plentiful; the weighted average price is lower as there are fewer ads on ground breast. More stores are featuring sausage, but the most actively promoted grind continues to be the 93% lean. Deli retail activity slows on both service deli and self-service deli items. Service deli is most active on thick slicing meats. Self-service deli offerings increase on processor brands, decline on private brands.



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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Fri. Mar 21, 2014

(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 <sup>4/</sup> Activity Index <sup>2/</sup>	67.9% of 4,700 sampled outlets 10.5% of stores w/ no-price promotions Activity Index = 8,860			49.0% of 5,900 sampled outlets 7.4% of stores w/ no-price promotions Activity Index = 2,680			29.1% of 4,200 sampled outlets 0.5% of stores w/ no-price promotions Activity Index = 2,030		
	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	0.99 - 1.69	340	1.05				0.99	110	0.99
" - Toms	0.99	170	0.99				0.99	110	0.99
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.99	10	2.99						
Frozen	1.49 - 1.99	630	1.70	1.29	120	1.29	0.99 - 1.99	460	1.50
Split, bone-in									
Fresh	2.99	60	2.99						
Rotisserie	8.99	10	8.99	6.99	10	6.99	6.99	10	6.99
Boneless, whole	5.99	160	5.99						
Cutlets	4.49 - 4.99	1,230	4.82	4.99	60	4.99			
Cutlets, thin sliced									
Strips									
Tenders	4.49 - 4.99	570	4.64	5.49	100	5.49			
Marinated Tenders	4.26 - 4.79	430	4.34						
Drumsticks	1.59 - 1.98	220	1.77				1.49 - 1.99	220	1.86
Thighs							1.69 - 1.79	120	1.78
Wings	1.98	100	1.98				1.29 - 1.99	230	1.83
Necks							1.29 - 1.69	30	1.55
Smoked Drumsticks	1.99 - 2.79	210	2.64						
Smoked Wings	2.29 - 2.79	190	2.31						
Smoked Necks	1.99	180	1.99						
<b>GROUND TURKEY:</b>									
Patties	3.49 - 4.49	490	3.88	3.00 - 3.49	50	3.34	3.49	20	3.49
Sausage	2.63 - 3.99	400	3.14	2.50 - 3.50	480	2.58	2.79 - 3.29	90	3.07
85% lean	2.33 - 3.33	970	2.79	1.99 - 2.99	410	2.34	2.49 - 2.80	140	2.54
93% lean	2.98 - 3.84	1,430	3.36	2.73 - 3.49	1,190	3.29	2.98 - 3.49	70	3.22
Breast (99-100% lean)	3.99 - 5.38	350	5.01	4.61 - 4.99	50	4.87	4.16 - 4.48	180	4.17
Rolls (frsh/frz 1 lb.)	2.99	160	2.99				1.99 - 2.99	220	2.23
<b>Specialty <sup>5/</sup></b>									
Patties	4.29	10	4.29						
93-94% lean	3.49 - 4.99	500	3.94	3.99	210	3.99	4.49	20	4.49
Breast	5.99	40	5.99						



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/21 thru 03/27.**

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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>	26.0% of 4,200 sampled outlets			20.7% of 2,800 sampled outlets			35.5% of 1,200 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	0.0% of stores w/ no-price promotions			2.3% of stores w/ no-price promotions			1.7% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 1,380			Activity Index = 530			Activity Index = 550		
	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	0.99	50	0.99				0.99	10	0.99
" - Toms	0.99	50	0.99				0.99	10	0.99
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.49	20	2.49						
Frozen	0.99 - 1.99	360	1.48	1.79 - 1.99	40	1.89	1.59 - 1.99	160	1.90
Split, bone-in									
Fresh									
Rotisserie	9.99	10	9.99						
Boneless, whole									
Cutlets				4.49	40	4.49			
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks				1.49	10	1.49			
Thighs									
Wings									
Necks									
Smoked Drumsticks							1.99	10	1.99
Smoked Wings									
Smoked Necks	2.49	40	2.49						
<b>GROUND TURKEY:</b>									
Patties									
Sausage	2.50 - 3.43	120	2.73				2.79 - 3.52	90	3.07
85% lean	2.00 - 3.00	310	2.92	2.00 - 2.99	120	2.50			
93% lean	2.73 - 3.24	100	2.94	3.19 - 3.99	240	3.36	2.80 - 3.99	180	2.93
Breast (99-100% lean)	4.16	40	4.16	5.35	30	5.35	4.39 - 5.58	40	4.82
Rolls (frsh/frz 1 lb.)	0.99 - 2.99	280	2.08	2.99	40	2.99	1.79 - 2.99	30	2.35
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean				4.59	10	4.59	4.49	10	4.49
Breast							5.49	10	5.49



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

Fri. Mar 21, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/21 thru 03/27.

(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		80.6% of 4,700 sampled outlets			67.7% of 5,900 sampled outlets		
Feature Rate <sup>1/</sup>	66.0% of 22,900 stores		67.9% of 22,900 stores		76.2% of 23,200 stores		Activity Index = 15,630			Activity Index = 8,090		
Activity Index <sup>2/</sup>	42,310		45,700		47,400		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						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,520	7.76	5,930	7.61	4,300	8.09	5.99 - 12.99	2,140	7.98	6.49 - 8.99	790	7.96
Private Brand	2,390	7.42	2,100	7.48	1,730	7.41	6.99 - 8.99	1,970	7.47	6.99	40	6.99
<b>Category 2</b>												
Processor Brand	2,680	5.80	3,640	5.64	6,610	6.13	4.98 - 6.99	1,140	5.86	4.99 - 6.99	110	5.29
Private Brand	2,110	6.68	2,770	6.79	2,330	6.86	4.99 - 6.99	320	6.50	4.99 - 6.99	270	6.58
<b>Category 3</b>												
Processor Brand	2,310	3.95	1,160	4.22	1,490	3.99	2.99 - 4.48	1,090	3.94	3.19 - 4.48	130	3.97
Private Brand	40	3.33	60	4.98	200	5.79	3.33	40	3.33			
<b>Turkey Ham</b>												
Processor Brand	330	3.35	370	4.21	410	4.14	2.99 - 4.99	60	4.19			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	360	4.95	390	3.82	480	4.39	3.99 - 4.99	210	4.33			
Private Brand	10	2.99										
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	3,200	7.93	2,030	7.57	2,330	7.69	5.99 - 9.99	1,130	7.99	5.99 - 8.99	930	8.12
Private Brand	1,470	7.20	2,640	7.66	1,820	7.05	6.99 - 8.48	1,310	7.22			
<b>Category 2</b>												
Processor Brand	40	5.49	60	4.98	60	5.03	4.99	20	4.99			
Private Brand	440	5.89	10	5.98	10	5.98	5.99	20	5.99			
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	9,020	3.05	6,910	3.11	9,210	2.99	2.29 - 3.99	2,250	3.31	1.99 - 3.89	2,040	3.24
Private Brand	1,280	2.61	3,780	2.89	2,760	3.12	1.99 - 3.33	560	2.80	2.00 - 2.50	250	2.07
<b>Turkey 16 oz</b>												
Processor Brand	2,140	5.09	3,360	5.33	1,440	5.30	3.99 - 5.99	530	4.96	4.99 - 5.99	1,260	5.18
Private Brand					210	4.80						
<b>Chicken 7-10 oz</b>												
Processor Brand	8,700	3.07	6,750	3.14	9,240	3.02	2.49 - 3.99	2,280	3.30	2.50 - 3.89	2,020	3.26
Private Brand	1,270	2.60	3,740	2.90	2,770	3.12	1.99 - 3.33	560	2.80	2.00 - 2.50	250	2.07

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 03/21 thru 03/27.

(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)		
	69.1% of 4,200 sampled outlets			51.5% of 4,200 sampled outlets			52.3% of 2,800 sampled outlets			71.1% of 1,200 sampled outlets		
	Activity Index = 8,720			Activity Index = 5,080			Activity Index = 3,080			Activity Index = 1,710		
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	6.98 - 8.99	590	7.27	5.99 - 7.99	780	7.33	6.99 - 8.99	190	7.53	7.99 - 8.99	30	8.30
Private Brand	6.99 - 10.99	310	7.32	5.99 - 7.99	70	6.70						
<b>Category 2</b>												
Processor Brand	4.99 - 6.99	960	5.95	4.99 - 5.99	280	5.68	4.99	170	4.99	5.98 - 5.99	20	5.98
Private Brand	4.99 - 6.99	810	6.34	5.99 - 7.99	460	6.89	7.99	40	7.99	7.49 - 7.99	210	7.68
<b>Category 3</b>												
Processor Brand	2.99 - 4.99	210	3.82	3.29 - 4.69	110	4.00	3.99	540	3.99	3.99	230	3.99
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	3.49	20	3.49	2.99 - 3.29	140	3.03	2.99 - 3.79	110	3.29			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.49	20	3.49	5.99	120	5.99	8.49	10	8.49			
Private Brand	2.99	10	2.99									
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.98 - 9.99	550	7.17	5.99 - 9.49	290	6.63	8.49 - 9.99	260	9.96	5.99 - 11.99	40	8.07
Private Brand	6.99 - 7.99	140	7.14	5.99	20	5.99						
<b>Category 2</b>												
Processor Brand	5.99	20	5.99									
Private Brand	4.49 - 5.99	370	5.89	4.99 - 5.99	50	5.82						
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	1.99 - 3.58	2,240	2.84	2.09 - 2.50	1,020	2.78	2.49 - 3.00	880	2.91	2.49 - 3.00	590	2.89
Private Brand	2.99 - 3.29	140	3.02	2.50 - 3.09	330	2.51						
<b>Turkey 16 oz</b>												
Processor Brand	4.98 - 5.00	110	4.99	3.99 - 5.00	240	4.95						
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	1.99 - 3.58	2,080	2.83	2.09 - 2.69	850	2.85	2.49 - 3.00	880	2.91	2.49 - 3.00	590	2.89
Private Brand	2.99 - 3.29	140	3.02	2.50	320	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)