



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/18 thru 04/24.

Fri. Apr 18, 2014

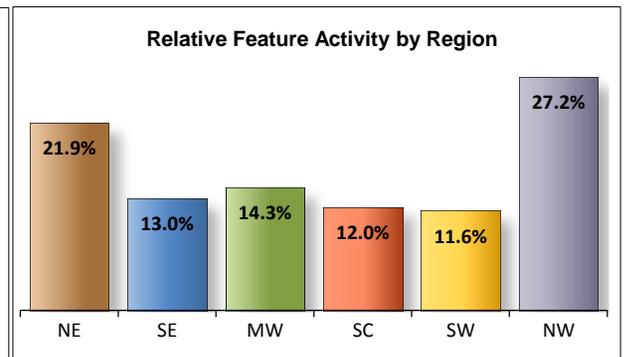
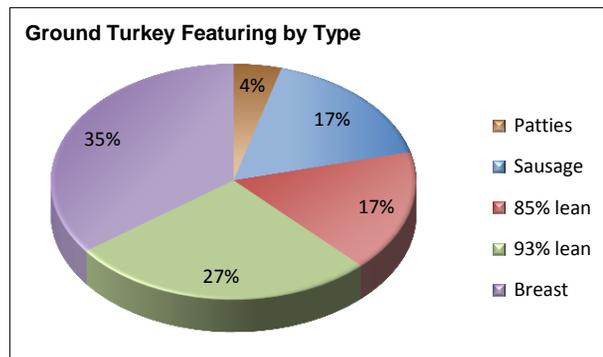
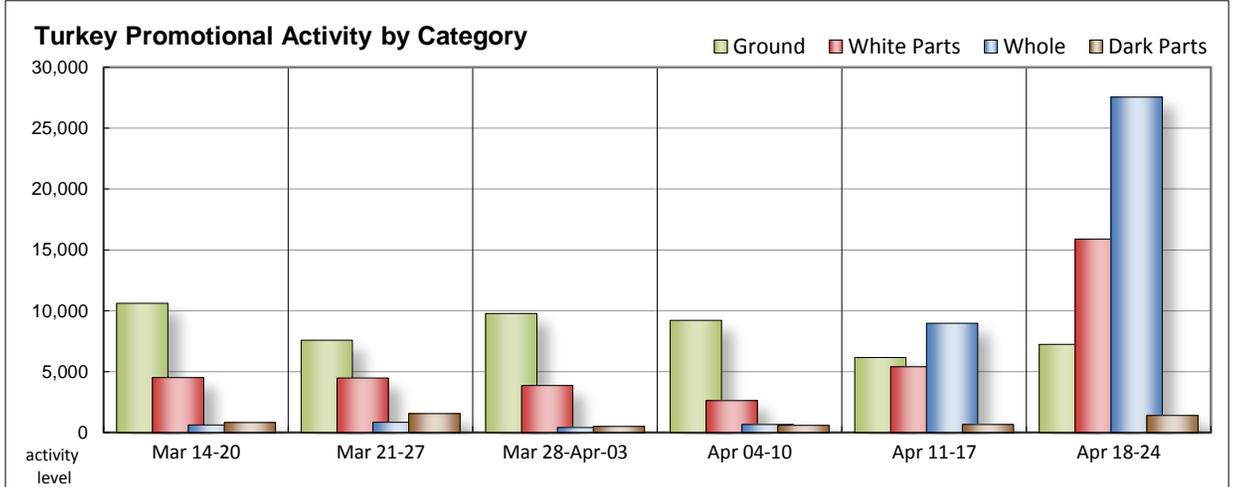
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	75.1% of 22,900 outlets		44.7% of 22,900 outlets		39.8% of 23,200 outlets	
Special Rate ^{4/}	1.7%		6.3%		1.0%	
Activity Index ^{2/}	52,610		23,270		14,030	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	8,550	1.70	1,900	1.53		
" - Toms	7,410	1.70	1,870	1.53		
Frozen - Hens	6,040	1.20	2,560	1.12	40	0.99
" - Toms	5,540	1.13	2,650	1.13	40	0.99
PARTS:						
Breast:						
Bone-in, whole						
Fresh	2,690	2.61	410	3.48	20	2.49
Frozen	10,820	1.58	3,920	1.69	900	1.85
Split, bone-in						
Fresh			10	2.49		
Rotisserie	1,850	8.93	340	8.80	2,570	8.72
Boneless, whole	20	4.99	110	5.46		
Cutlets	110	5.02	140	5.02	360	4.92
Cutlets, thin sliced			230	4.99	100	4.99
Strips						
Tenders	10	4.79	130	3.83	190	4.99
Marinated Tenders	380	4.18	120	4.35	620	4.28
Drumsticks	220	1.76	110	2.21	190	1.80
Thighs	270	1.79	70	2.25	10	1.99
Wings	260	2.06	130	2.56	270	2.09
Necks	20	1.73			180	1.79
Smoked Drumsticks	210	2.34	210	1.99	170	2.01
Smoked Wings	220	2.16	150	1.99	180	1.99
Smoked Necks	210	1.99			160	2.01
GROUND TURKEY:	7,250	3.77	6,170	3.23	7,750	3.21
Patties	310	4.00	460	3.91	830	3.60
Sausage	1,220	3.41	450	3.59	380	3.27
85% lean	1,210	2.72	2,680	2.73	2,940	2.63
93% lean	1,960	3.29	1,900	3.32	2,830	3.27
Breast	2,550	5.07	680	4.66	770	4.61
Rolls (frsh/frz 1 lb.)	220	2.99	490	2.76	30	2.49
Specialty ^{5/}						
Patties			10	4.99	30	4.74
93-94% lean	310	4.31	180	4.14	190	4.39
Breast			1,360	5.99	30	5.75

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

This Week's Turkey Feature Highlights

Retail activity surges going into Easter as grocers focus on whole turkeys and bone-in breasts for holiday meals. Easter is much later this year compared to a year earlier; promotional activity is less active on frozen hens, toms, more active on fresh compared to Easter last year. Advertised prices trend higher on fresh and frozen whole turkeys. Fresh and frozen bone-in breast featuring is more active compared to last Easter; prices are lower on fresh, higher on frozen. Offerings increase on rotisserie breasts and promotions can be found in all regions this week. Boneless white parts feature activity continues to be light, mostly marinated tenders at lower prices. Dark parts are fully represented and promotions are more active this week; prices are lower. More stores are offering ground turkey; the weighted average price is sharply higher due in part to the large increase in ground breast promotions. Featuring declines on specialty grinds. Deli feature activity slow on both service deli and self-service deli. There will be plenty of leftover turkey to make sandwiches. Offerings should increase next week, after the leftovers are gone.



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/}	76.2% of 4,700 sampled outlets 1.6% of stores w/ no-price promotions Activity Index = 14,630			78.1% of 5,900 sampled outlets 2.3% of stores w/ no-price promotions Activity Index = 11,880			76.6% of 4,200 sampled outlets 0.3% of stores w/ no-price promotions Activity Index = 8,710		
	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	1.29 - 1.99	2,160	1.71	1.29 - 1.98	940	1.68	1.48 - 2.49	1,510	1.83
" - Toms	1.29 - 1.99	1,790	1.68	1.29 - 1.98	730	1.68	1.48 - 2.49	1,510	1.83
Frozen - Hens	0.99 - 1.49	1,280	1.33	0.59 - 1.29	2,440	1.17	0.88 - 1.59	680	1.04
" - Toms	0.99 - 1.49	860	1.22	0.59 - 1.29	2,440	1.17	0.88 - 1.59	630	1.02
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99 - 3.49	1,580	2.55	1.48 - 3.99	440	2.72	1.99 - 3.49	280	2.59
Frozen	0.99 - 1.99	1,490	1.61	0.99 - 1.79	3,840	1.54	0.99 - 1.99	2,590	1.58
Split, bone-in									
Fresh									
Rotisserie	7.99 - 9.99	730	8.23	7.99 - 9.99	110	8.83	5.98 - 9.99	20	7.44
Boneless, whole	4.99	20	4.99						
Cutlets	4.98	100	4.98				5.45	10	5.45
Cutlets, thin sliced									
Strips									
Tenders							4.79	10	4.79
Marinated Tenders	3.72 - 4.66	320	4.22				3.99	60	3.99
Drumsticks				1.58	20	1.58	1.49 - 1.79	200	1.78
Thighs							1.79	270	1.79
Wings	2.99	40	2.99	2.99	20	2.99	1.49 - 1.79	200	1.78
Necks							1.69 - 1.79	20	1.73
Smoked Drumsticks	1.99 - 2.39	200	2.35				1.99	10	1.99
Smoked Wings	1.99 - 2.19	200	2.17	1.99	10	1.99	1.99	10	1.99
Smoked Necks	1.99	200	1.99	1.99	10	1.99			
GROUND TURKEY:									
Patties	2.99 - 4.49	310	4.00						
Sausage	2.79 - 3.99	990	3.38	3.19	20	3.19	3.27	80	3.27
85% lean	2.33 - 3.61	480	2.83	2.50 - 3.69	420	2.71	2.39 - 3.59	100	2.71
93% lean	2.98 - 3.50	1,000	3.20	2.49 - 3.49	380	3.17	2.32 - 3.79	300	3.38
Breast (99-100% lean)	4.59 - 5.38	600	4.85	4.61	60	4.61	3.91 - 5.19	20	4.73
Rolls (frsh/frz 1 lb.)							2.99	180	2.99
Specialty ^{5/}									
Patties									
93-94% lean	2.99 - 5.99	280	4.29				4.49	20	4.49
Breast									



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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/}	65.5% of 4,200 sampled outlets			71.9% of 2,800 sampled outlets			90.4% of 1,200 sampled outlets		
Special Rate ^{4/}	2.1% of stores w/ no-price promotions			2.3% of stores w/ no-price promotions			1.2% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 7,320			Activity Index = 5,110			Activity Index = 4,960		
	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	1.39 - 1.99	1,500	1.62	1.48 - 2.19	1,560	1.69	1.48 - 1.97	880	1.67
" - Toms	1.39 - 1.99	1,370	1.61	1.48 - 2.19	1,390	1.71	1.48 - 1.97	620	1.67
Frozen - Hens	0.79 - 1.39	890	1.05	1.69 - 1.79	30	1.71	0.99 - 2.99	720	1.42
" - Toms	0.79 - 1.39	880	1.05	1.69	20	1.69	0.99 - 1.69	710	1.06
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.79 - 2.99	60	2.95	2.59 - 2.99	120	2.63	2.49 - 2.99	210	2.70
Frozen	0.98 - 1.59	1,580	1.54	0.99 - 1.99	600	1.61	0.99 - 1.99	720	1.83
Split, bone-in									
Fresh									
Rotisserie	7.99 - 9.99	360	8.99	8.99 - 9.99	420	9.66	9.99	210	9.99
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties									
Sausage	3.18 - 3.27	30	3.20				3.27 - 4.09	100	3.92
85% lean	2.08 - 2.74	110	2.66	2.00 - 3.19	100	2.34			
93% lean	3.19 - 3.79	110	3.58	3.29 - 4.31	40	4.08	3.19 - 3.99	130	3.69
Breast (99-100% lean)	4.39 - 5.19	390	5.09	5.19	820	5.19	4.39 - 5.19	660	5.17
Rolls (frsh/frz 1 lb.)	2.99	40	2.99						
Specialty ^{5/}									
Patties									
93-94% lean				4.59	10	4.59			
Breast									



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 04/18 thru 04/24.

(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		80.9% of 4,700 sampled outlets			57.5% of 5,900 sampled outlets		
Feature Rate ^{1/}	62.0% of 22,900 stores		77.6% of 22,900 stores		67.0% of 23,200 stores		Activity Index = 12,350			Activity Index = 9,950		
Activity Index ^{2/}	38,450		47,990		42,680		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	5,660	8.06	4,030	7.72	3,570	8.07	6.48 - 12.99	2,540	8.46	6.99 - 8.99	2,100	7.53
Private Brand	2,010	6.66	1,950	7.03	1,340	7.65	5.99 - 9.99	1,650	6.56			
Category 2												
Processor Brand	3,000	5.76	3,920	5.79	4,500	5.77	4.49 - 6.69	1,110	5.79	4.99 - 6.99	510	5.64
Private Brand	4,350	7.07	7,280	7.23	5,190	7.07	4.99 - 7.99	460	6.31	6.49 - 7.99	630	6.99
Category 3												
Processor Brand	700	4.26	1,230	4.14	800	3.80	3.99 - 4.49	510	4.28	4.38	20	4.38
Private Brand	120	5.87	60	4.71	190	5.52						
Turkey Ham												
Processor Brand	280	3.81	570	4.28	200	3.52	3.99 - 4.99	110	4.25	3.98	10	3.98
Private Brand												
Turkey Pastrami												
Processor Brand	70	5.28	390	4.02	480	4.21	3.99	50	3.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,000	7.45	3,640	6.87	4,660	7.79	5.99 - 9.99	690	6.75	7.99	830	7.99
Private Brand	940	7.49	2,150	7.43	1,320	7.25	6.99 - 8.99	720	7.62	6.99	70	6.99
Category 2												
Processor Brand	170	4.92	280	5.77	320	5.02	4.99	110	4.99	4.99	30	4.99
Private Brand	150	5.99	70	6.33	520	6.76						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,650	3.06	7,800	3.12	8,310	3.17	2.49 - 3.99	980	3.20	1.97 - 3.89	2,690	3.08
Private Brand	1,420	2.88	2,740	2.67	1,020	2.64	2.18 - 3.29	1,000	2.81	2.50 - 2.99	80	2.59
Turkey 16 oz												
Processor Brand	1,240	5.02	1,550	4.79	1,020	5.10	3.99 - 5.99	660	4.60	4.99 - 5.99	290	5.84
Private Brand			80	5.99	170	4.99						
Chicken 7-10 oz												
Processor Brand	7,330	3.06	7,510	3.11	8,110	3.18	2.49 - 3.99	820	3.21	2.49 - 3.99	2,610	3.09
Private Brand	1,360	2.88	2,740	2.67	960	2.61	2.18 - 3.29	940	2.80	2.50 - 2.99	80	2.59

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)		
	58.4% of 4,200 sampled outlets			53.2% of 4,200 sampled outlets			58.2% of 2,800 sampled outlets			62.2% of 1,200 sampled outlets		
	Activity Index = 7,290			Activity Index = 4,860			Activity Index = 2,240			Activity Index = 1,760		
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	5.99 - 8.88	390	7.58	7.99 - 10.49	460	8.62	6.49 - 8.99	50	7.80	6.99 - 12.99	120	8.49
Private Brand	6.99 - 7.99	310	7.08	6.49 - 7.99	50	7.24						
Category 2												
Processor Brand	4.98 - 6.99	930	6.00	4.99 - 6.49	270	5.49	4.99	170	4.99	5.99	10	5.99
Private Brand	5.98 - 7.99	890	6.31	6.49 - 7.99	680	7.42	6.99 - 8.99	820	8.05	5.99 - 8.99	870	7.13
Category 3												
Processor Brand	4.49	10	4.49	4.38	10	4.38	3.57 - 4.99	110	4.20	3.99	40	3.99
Private Brand	4.49	10	4.49	5.99	110	5.99						
Turkey Ham												
Processor Brand				3.39 - 3.99	40	3.59	2.99 - 3.79	120	3.46			
Private Brand												
Turkey Pastrami												
Processor Brand	8.49	20	8.49									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 7.99	160	7.14	5.99 - 7.99	210	7.60	7.99 - 8.49	30	8.15	7.99	80	7.99
Private Brand	6.98 - 6.99	130	6.99	7.99	20	7.99						
Category 2												
Processor Brand	4.29 - 4.49	20	4.38	4.99	10	4.99						
Private Brand	5.99	150	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.29 - 3.69	1,880	2.99	2.49 - 2.99	1,360	3.04	2.49 - 3.99	460	3.03	2.69 - 3.98	280	3.00
Private Brand	2.99 - 3.29	220	3.25	3.00	120	3.00						
Turkey 16 oz												
Processor Brand	4.99 - 5.99	110	5.06	4.99	80	4.99	4.59	20	4.59	5.49	80	5.49
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.29 - 3.69	1,840	2.98	2.49 - 3.00	1,320	3.04	2.49 - 3.99	460	3.03	2.69 - 3.98	280	3.00
Private Brand	2.99 - 3.29	220	3.25	3.00	120	3.00						

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)