



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/25 thru 05/01.

Fri. Apr 25, 2014

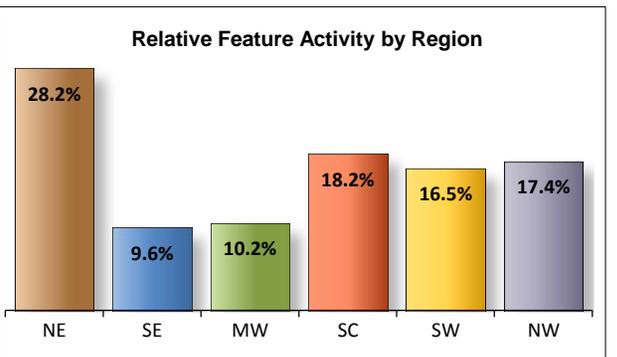
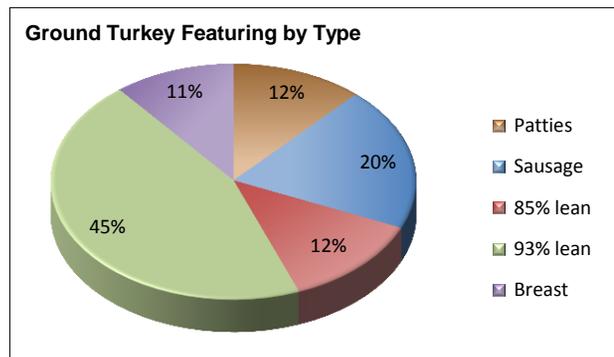
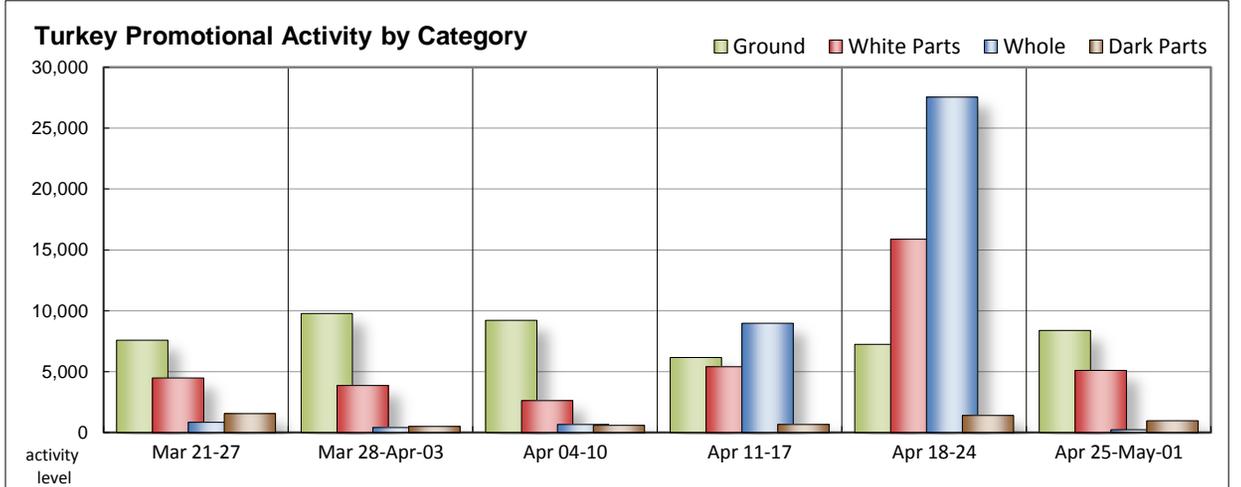
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	44.2% of 22,900 outlets		75.1% of 22,900 outlets		35.4% of 23,200 outlets	
Special Rate ^{4/}	3.0%		1.7%		0.1%	
Activity Index ^{2/}	17,630		52,610		13,490	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	60	1.39	8,550	1.70		
" - Toms	60	1.39	7,410	1.70		
Frozen - Hens	60	0.99	6,040	1.20	150	1.13
" - Toms	60	0.99	5,540	1.13	40	0.99
PARTS:						
Breast:						
Bone-in, whole						
Fresh	60	2.99	2,690	2.61	30	2.36
Frozen	1,770	1.50	10,820	1.58	840	1.60
Split, bone-in						
Fresh						
Rotisserie	310	9.43	1,850	8.93	660	7.73
Boneless, whole	190	5.85	20	4.99	50	5.29
Cutlets	630	4.04	110	5.02	730	4.24
Cutlets, thin sliced						
Strips						
Tenders	600	4.06	10	4.79	650	4.04
Marinated Tenders	1,550	5.07	380	4.18	910	4.32
Drumsticks	380	1.65	220	1.76	260	1.82
Thighs	10	1.69	270	1.79		
Wings	250	1.63	260	2.06	250	1.88
Necks	10	1.69	20	1.73	20	1.57
Smoked Drumsticks	140	2.02	210	2.34	10	1.79
Smoked Wings	150	1.99	220	2.16	20	2.19
Smoked Necks	40	1.91	210	1.99		
GROUND TURKEY:	8,390	3.55	7,250	3.77	7,670	3.35
Patties	990	4.05	310	4.00	750	3.64
Sausage	1,660	3.59	1,220	3.41	1,070	3.52
85% lean	1,060	2.80	1,210	2.72	1,230	2.46
93% lean	3,770	3.33	1,960	3.29	3,330	3.19
Breast	910	4.67	2,550	5.07	1,290	4.52
Rolls (frsh/frz 1 lb.)	180	2.27	220	2.99	30	1.76
Specialty ^{5/}						
Patties	330	4.98			260	4.99
93-94% lean	740	4.28	310	4.31	270	4.29
Breast	1,660	6.38			630	5.45

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

This Week's Turkey Feature Highlights

The holidays are over and retail activity on turkey is back to a more normal level. A limited number of stores are advertising fresh and frozen whole turkeys at very attractive prices. Offerings decline on fresh and frozen bone-in breasts, although there are still plenty of frozen bone-in breasts in this week's circulars and prices are lower. Shoppers will have a more difficult time finding offerings on rotisserie breasts; prices are higher. With the focus off bone-in white parts, more boneless white parts are finding space in this week's pages. Featuring is most active on marinated tenders; however cutlets and tenders are competitively priced and should attract the price conscious shopper. Fewer stores offer dark parts; prices are lower. Offerings increase on ground turkey; the weighted average price is lower as featuring slows on ground breast, although prices are higher on all grinds. Offerings increase on specialty ground turkey. Feature activity increases on service deli and self-service deli items. Stores increase the percent of promotions on private brands. Service deli featuring is most active on the lower priced thin slicing and value meats.



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/}	70.6% of 4,700 sampled outlets 3.6% of stores w/ no-price promotions Activity Index = 6,010			38.2% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,790			37.8% of 4,200 sampled outlets 4.9% of stores w/ no-price promotions Activity Index = 1,970		
	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	60	1.39						
" - Toms	1.39	60	1.39						
Frozen - Hens							0.99	10	0.99
" - Toms							0.99	10	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	60	2.99						
Frozen	1.49	200	1.49	1.28 - 1.49	650	1.42	1.49 - 1.99	500	1.50
Split, bone-in									
Fresh									
Rotisserie	8.99	10	8.99						
Boneless, whole	4.97 - 5.99	190	5.85						
Cutlets	3.99 - 4.55	530	4.01	3.99	60	3.99	3.99 - 4.99	40	4.45
Cutlets, thin sliced									
Strips									
Tenders	3.99	400	3.99				3.88 - 4.99	160	4.01
Marinated Tenders	4.26 - 5.33	430	4.67	4.26 - 5.33	1,040	5.29	4.66 - 5.33	30	4.78
Drumsticks	1.69	140	1.69				1.69	10	1.69
Thighs							1.69	10	1.69
Wings							1.59 - 1.69	30	1.63
Necks							1.69	10	1.69
Smoked Drumsticks	1.98 - 2.79	130	2.03				1.89	10	1.89
Smoked Wings	1.98 - 2.79	130	2.03				1.69 - 1.89	20	1.79
Smoked Necks	1.68 - 1.99	30	1.88				1.99	10	1.99
GROUND TURKEY:									
Patties	3.50 - 4.99	240	4.15	3.39 - 3.50	80	3.42	3.33 - 3.99	70	3.59
Sausage	2.79 - 4.09	670	3.45	3.19 - 3.78	310	3.64	3.19 - 4.99	150	3.45
85% lean	1.98 - 3.07	130	2.15	2.50	70	2.50	1.99 - 2.99	250	2.80
93% lean	2.30 - 3.84	1,590	3.22	2.49 - 3.07	330	2.99	2.99 - 3.88	330	3.31
Breast (99-100% lean)	3.84 - 5.38	350	4.81	3.99	10	3.99	3.73 - 4.99	130	4.06
Rolls (frsh/frz 1 lb.)	2.99	10	2.99				2.99	40	2.99
Specialty ^{5/}									
Patties	4.49 - 4.99	330	4.98						
93-94% lean	3.99 - 4.99	220	4.96	3.99	200	3.99	3.99	140	3.99
Breast	5.00 - 6.49	100	6.22	6.49	40	6.49	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/}	39.0% of 4,200 sampled outlets			33.2% of 2,800 sampled outlets			37.1% of 1,200 sampled outlets		
Special Rate ^{4/}	7.7% 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 = 3,530			Activity Index = 2,320			Activity Index = 1,010		
	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									
Frozen	1.29 - 1.69	310	1.56	1.49 - 1.99	30	1.69	1.88	80	1.88
Split, bone-in									
Fresh									
Rotisserie	9.49	290	9.49				7.99	10	7.99
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	4.99	40	4.99						
Marinated Tenders	3.99	30	3.99				3.99	20	3.99
Drumsticks	1.59	10	1.59	1.49 - 1.79	220	1.62			
Thighs									
Wings	1.59	10	1.59	1.59 - 1.79	210	1.63			
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.99 - 4.49	180	4.22	2.99 - 4.99	400	4.13	3.99	20	3.99
Sausage	2.99 - 3.68	200	3.40	3.29 - 4.09	230	4.06	3.27 - 4.09	100	3.90
85% lean	2.66 - 3.49	530	3.06	2.00 - 2.99	60	2.35	2.67	20	2.67
93% lean	2.66 - 3.03	640	3.50	2.39 - 4.39	470	3.38	3.19 - 4.39	410	3.71
Breast (99-100% lean)	4.16 - 4.99	380	4.80	4.39	20	4.39	4.39	20	4.39
Rolls (frsh/frz 1 lb.)				1.99	130	1.99			
Specialty ^{5/}									
Patties									
93-94% lean	3.99	180	3.99						
Breast	5.97 - 6.49	630	6.25	6.49	550	6.49	6.49	330	6.49



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 04/25 thru 05/01.

(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		83.5% of 4,700 sampled outlets Activity Index = 17,470			49.2% of 5,900 sampled outlets Activity Index = 8,030		
Feature Rate ^{1/}	68.4% of 22,900 stores		62.0% of 22,900 stores		79.4% of 23,200 stores							
Activity Index ^{2/}	49,900		38,450		46,130							
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,180	7.79	5,660	8.06	5,470	7.70	6.48 - 10.99	2,020	7.93	6.99 - 9.99	300	9.31
Private Brand	3,510	7.66	2,010	6.66	2,300	7.58	6.98 - 9.49	3,280	7.58	6.99	20	6.99
Category 2												
Processor Brand	4,500	6.08	3,000	5.76	3,280	5.70	4.98 - 6.99	740	6.09	4.99 - 6.49	1,090	6.37
Private Brand	6,300	6.88	4,350	7.07	4,760	7.22	5.00 - 7.99	2,820	6.87	4.99 - 7.99	900	6.21
Category 3												
Processor Brand	1,420	4.18	700	4.26	1,580	4.04	3.90 - 4.99	620	4.47	2.99 - 4.00	120	3.38
Private Brand	40	3.99	120	5.87	120	3.66	3.99	20	3.99			
Turkey Ham												
Processor Brand	320	3.75	280	3.81	80	3.53	2.99 - 4.99	210	3.85			
Private Brand					40	4.48						
Turkey Pastrami												
Processor Brand	240	4.27	70	5.28	160	5.40	3.79 - 4.99	130	3.92			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,080	7.81	2,000	7.45	3,360	7.52	5.99 - 8.99	740	7.82	5.99 - 8.99	870	7.70
Private Brand	1,060	7.78	940	7.49	310	7.75	5.99 - 7.99	1,040	7.77			
Category 2												
Processor Brand	430	5.62	170	4.92	290	6.41	4.99 - 5.99	370	5.65	5.99	20	5.99
Private Brand	520	5.99	150	5.99	810	6.81						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,390	3.16	7,650	3.06	8,640	3.08	1.99 - 3.99	2,160	3.22	1.99 - 3.50	1,790	3.10
Private Brand	3,410	2.59	1,420	2.88	1,660	3.14	2.50 - 3.49	460	2.66	2.50 - 2.79	610	2.55
Turkey 16 oz												
Processor Brand	1,240	4.86	1,240	5.02	3,200	4.81	3.98 - 5.99	290	4.49	4.99	10	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	7,840	3.19	7,330	3.06	8,410	3.07	1.99 - 3.99	2,110	3.22	1.99 - 3.50	1,690	3.15
Private Brand	3,420	2.58	1,360	2.88	1,660	3.14	2.50 - 3.49	460	2.56	2.50 - 2.79	610	2.55

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)		
	74.2% of 4,200 sampled outlets			72.6% of 4,200 sampled outlets			63.7% of 2,800 sampled outlets			80.1% of 1,200 sampled outlets		
	Activity Index = 8,770			Activity Index = 8,020			Activity Index = 4,750			Activity Index = 2,860		
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	6.99 - 11.99	880	7.39	6.48 - 7.99	640	7.22	6.99 - 8.99	90	7.18	5.99 - 7.99	250	7.89
Private Brand	7.99 - 10.99	50	8.59	7.99	30	7.99	9.49	130	9.49			
Category 2												
Processor Brand	4.98 - 6.99	980	6.12	4.99 - 5.99	1,230	5.78	4.99 - 5.99	360	5.93	5.99 - 6.99	100	6.84
Private Brand	5.00 - 7.99	910	6.03	6.49 - 7.99	610	7.32	7.99	590	7.99	7.49 - 7.99	470	7.85
Category 3												
Processor Brand	2.99 - 4.49	120	3.87	3.49 - 4.49	290	3.67	3.99	110	3.99	4.99	160	4.99
Private Brand	3.99	20	3.99									
Turkey Ham												
Processor Brand	3.69 - 3.99	30	3.86	3.19 - 3.49	30	3.37	2.79 - 3.69	50	3.53			
Private Brand												
Turkey Pastrami												
Processor Brand	3.69 - 3.99	30	3.86							4.99	80	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.49	740	7.28	6.49 - 7.99	470	7.63	8.99 - 9.99	260	9.96			
Private Brand					20	7.99						
Category 2												
Processor Brand	4.49 - 5.88	40	5.14									
Private Brand	5.99	150	5.99	5.99	370	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.69	1,390	3.08	1.88 - 2.49	1,330	3.01	2.99 - 3.50	970	3.35	2.00 - 3.50	750	3.29
Private Brand	1.99 - 3.49	770	2.48	2.50 - 2.99	830	2.63	2.50 - 2.99	610	2.68	2.50	130	2.50
Turkey 16 oz												
Processor Brand	3.69 - 5.39	580	4.96	3.49 - 4.99	250	4.56				5.99	110	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 3.69	1,300	3.09	1.88 - 2.49	1,090	3.08	2.99 - 3.50	970	3.35	2.00 - 3.50	680	3.32
Private Brand	1.99 - 3.49	780	2.50	2.50 - 2.99	830	2.63	2.50 - 2.99	610	2.68	2.50	130	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)