



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/09 thru 05/15.

Fri. May 09, 2014

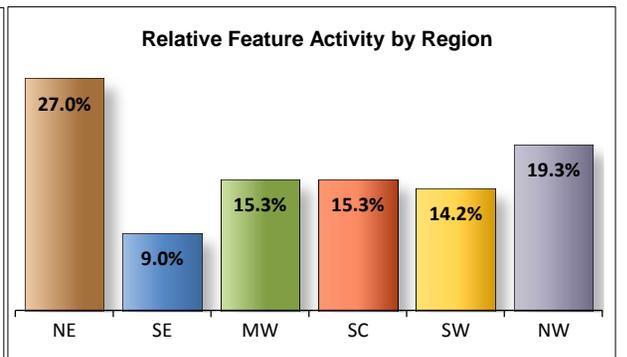
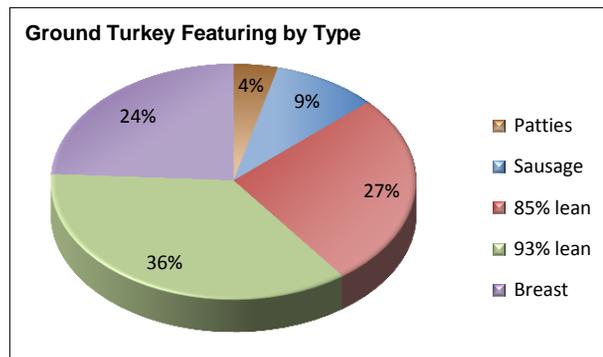
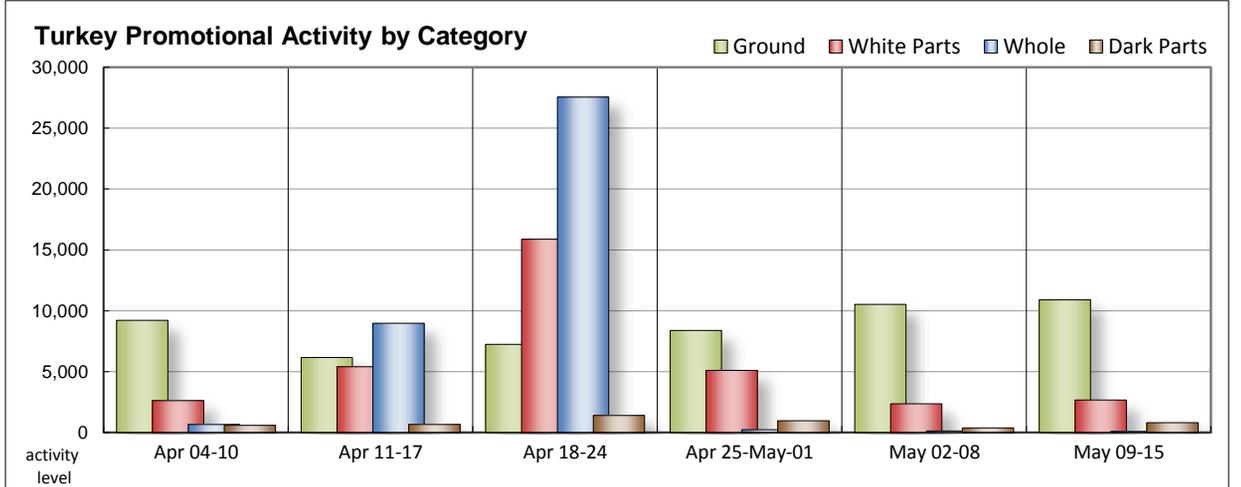
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	50.1% of 22,900 outlets		48.0% of 22,900 outlets		39.3% of 23,200 outlets	
Special Rate ^{4/}	1.5%		8.1%		1.4%	
Activity Index ^{2/}	15,350		15,870		13,610	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	50	0.99	70	1.09	260	1.04
" - Toms	50	0.99	70	1.09	70	1.33
PARTS:						
Breast:						
Bone-in, whole						
Fresh	120	2.07			170	2.75
Frozen	720	1.59	530	1.54	920	1.66
Split, bone-in						
Fresh	20	3.49				
Rotisserie	30	7.99	100	7.99	220	7.80
Boneless, whole	50	4.98	170	5.96	90	5.02
Cutlets	1,070	4.96	900	4.71	990	5.01
Cutlets, thin sliced	270	4.99	180	4.99	170	4.99
Strips					170	4.99
Tenders	100	4.98	280	4.24	30	3.98
Marinated Tenders	300	3.49	210	4.26	650	4.52
Drumsticks	50	1.72	40	1.74	100	1.55
Thighs	10	1.69	10	1.99	130	1.90
Wings	100	2.48	40	1.74	50	1.82
Necks	30	1.75	30	1.88	10	1.29
Smoked Drumsticks	200	2.63	90	2.49	210	2.18
Smoked Wings	220	2.26	90	2.29	200	2.01
Smoked Necks	210	2.25	90	2.29	180	1.99
GROUND TURKEY:	10,900	3.42	10,530	3.16	8,290	3.51
Patties	430	3.81	360	3.56	250	3.56
Sausage	1,020	2.96	2,100	3.42	1,220	3.52
85% lean	2,900	2.52	3,690	2.46	1,580	2.65
93% lean	3,920	3.27	2,990	3.26	3,000	3.31
Breast	2,630	4.93	1,390	4.40	2,240	4.62
Rolls (frsh/frz 1 lb.)	260	2.49	490	2.00	140	2.14
Specialty ^{5/}						
Patties					20	4.68
93-94% lean	560	4.30	670	4.31	450	4.50
Breast	30	4.99	1,280	6.50	90	5.79

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

This Week's Turkey Feature Highlights

Retail feature activity declines on turkey, increases on deli items. There are only limited offerings of frozen hens and toms. Offerings increase on fresh and frozen bone-in breasts; prices are higher on frozen bone-in breasts. Retailers do not seem to have much interest in promoting rotisserie breasts this week. Boneless white parts offerings focus on cutlets at higher prices. Prices on marinated tenders are the most attractive choice for boneless white parts. More ads are featuring dark parts, especially smoked parts; prices are mixed. Ground turkey is getting slightly more space in this week's circulars; the weighted average price is higher. Retailers increase featuring on 93% lean and ground breast, the healthiest choices. Fewer stores promote specialty grinds. Feature activity declines on service deli, increases on self-service deli. The thick slicing deli meat continues to be the most popular option for service deli. Self-service feature activity increases mostly due to more stores promoting private label product.



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/}	63.7% of 4,700 sampled outlets 1.3% of stores w/ no-price promotions Activity Index = 5,080			38.5% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,300			52.2% of 4,200 sampled outlets 4.9% of stores w/ no-price promotions Activity Index = 2,610		
	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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	10	2.99				1.99	110	1.99
Frozen	1.38 - 1.39	90	1.38	1.38 - 1.59	160	1.43	0.99 - 1.99	150	1.79
Split, bone-in									
Fresh							3.49	20	3.49
Rotisserie	6.99	20	6.99						
Boneless, whole	4.99 - 5.49	40	5.10						
Cutlets	4.99 - 5.49	850	5.02				4.69 - 5.45	180	4.72
Cutlets, thin sliced	4.99	180	4.99				4.99	90	4.99
Strips									
Tenders							4.79 - 4.99	100	4.98
Marinated Tenders	4.79	50	4.79				3.19 - 4.66	250	3.23
Drumsticks	1.59	10	1.59				1.49 - 1.99	40	1.75
Thighs							1.69	10	1.69
Wings	1.59	10	1.59				1.49 - 2.99	70	2.47
Necks							1.39 - 1.99	30	1.75
Smoked Drumsticks	1.99 - 2.69	200	2.63						
Smoked Wings	1.99 - 2.29	200	2.26	2.39	10	2.39	1.99	10	1.99
Smoked Necks	1.99 - 2.29	200	2.26				1.99	10	1.99
GROUND TURKEY:									
Patties	3.49 - 3.99	20	3.63	3.00	10	3.00	3.00	10	3.00
Sausage	2.79 - 3.50	400	2.95	3.50	20	3.50	2.99 - 3.27	110	3.23
85% lean	2.39 - 4.26	490	2.72	1.99 - 2.99	860	2.48	1.99 - 3.29	700	2.44
93% lean	3.07 - 5.49	1,110	3.38	3.07 - 3.50	1,210	3.21	2.50 - 3.99	440	2.99
Breast (99-100% lean)	4.61 - 6.49	610	4.89				3.74 - 5.19	270	4.05
Rolls (frsh/frz 1 lb.)				2.99	30	2.99	2.99	10	2.99
Specialty ^{5/}									
Patties									
93-94% lean	3.99 - 4.99	560	4.30						
Breast	4.99	30	4.99						



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/09 thru 05/15.

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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/}	42.8% of 4,200 sampled outlets			52.8% of 2,800 sampled outlets			66.0% of 1,200 sampled outlets		
Special Rate ^{4/}	2.1% 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 = 2,610			Activity Index = 1,760			Activity Index = 990		
	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	0.98 - 1.77	300	1.61	1.99	10	1.99	1.78	10	1.78
Split, bone-in									
Fresh									
Rotisserie	9.99	10	9.99						
Boneless, whole									
Cutlets	4.69	40	4.69				4.49	10	4.49
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings	2.99	20	2.99						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.49 - 3.99	280	3.80	3.99	40	3.99	3.99	70	3.99
Sausage	2.98 - 3.67	170	3.33	2.45	250	2.45	3.27	70	3.27
85% lean	2.39 - 2.66	400	2.54	2.39 - 2.66	430	2.49	2.33	20	2.33
93% lean	2.79 - 3.19	610	3.15	3.19 - 3.99	110	3.26	2.79 - 4.39	440	3.59
Breast (99-100% lean)	4.16 - 5.19	590	4.75	3.99 - 5.59	790	5.29	3.98 - 5.99	370	5.13
Rolls (frsh/frz 1 lb.)	2.99	90	2.99	1.99	130	1.99			
Specialty ^{5/}									
Patties									
93-94% lean									
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 05/09 thru 05/15.

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

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate ^{1/}	60.5% of 22,900 stores		62.2% of 22,900 stores		69.9% of 23,200 stores		74.1% of 4,700 sampled outlets			37.3% of 5,900 sampled outlets		
Activity Index ^{2/}	43,510		42,960		47,610		Activity Index = 14,680			Activity Index = 7,130		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5,010	7.87	7,780	8.12	5,010	8.23	6.48 - 12.99	1,600	8.43	6.99 - 8.99	1,140	8.09
Private Brand	3,310	7.07	1,780	7.57	760	7.27	6.98 - 7.99	2,390	6.99			
Category 2												
Processor Brand	5,060	5.77	2,540	5.94	3,920	5.89	4.99 - 6.99	1,460	6.37	4.99 - 6.99	340	5.86
Private Brand	650	6.21	2,400	6.62	6,650	7.29	4.99 - 6.99	350	5.77	6.99	210	6.99
Category 3												
Processor Brand	1,390	4.16	940	4.27	1,470	3.97	3.98 - 4.99	910	4.16	3.98 - 4.38	190	4.03
Private Brand	40	4.48	1,160	5.00	1,300	4.97	4.48	40	4.48			
Turkey Ham												
Processor Brand	660	4.44	370	3.49	530	3.40	3.98 - 4.99	370	4.86	4.99	20	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	510	4.12	140	4.04	310	3.69	3.79 - 4.99	420	4.06	4.99	20	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,270	7.62	3,490	7.92	2,630	7.71	5.99 - 8.99	1,550	7.74	5.99 - 8.99	920	7.79
Private Brand	1,400	5.98	970	7.21	1,300	6.65	4.99 - 6.99	890	5.03			
Category 2												
Processor Brand	360	5.07	20	4.49	380	5.11	4.99	290	4.99	5.99	20	5.99
Private Brand			1,650	5.32	1,460	5.13						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,490	2.92	7,460	2.97	8,920	3.11	2.50 - 3.99	1,920	3.11	2.50 - 3.79	1,360	3.00
Private Brand	1,840	2.93	790	2.79	1,840	3.30	2.69 - 3.50	120	3.42	0.50 - 3.99	660	2.56
Turkey 16 oz												
Processor Brand	1,620	5.27	3,270	5.01	1,020	5.21	4.99 - 5.99	550	5.08	4.99 - 5.99	290	5.76
Private Brand	170	4.99	120	3.99								
Chicken 7-10 oz												
Processor Brand	7,930	2.92	7,310	2.98	8,270	3.14	2.50 - 3.99	1,700	3.15	2.50 - 3.79	1,330	3.00
Private Brand	1,800	2.96	770	2.78	1,840	3.30	2.69 - 3.50	120	3.42	1.99 - 3.99	630	2.63

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)		
	68.5% of 4,200 sampled outlets			66.4% of 4,200 sampled outlets			63.4% of 2,800 sampled outlets			66.6% of 1,200 sampled outlets		
	Activity Index = 8,200			Activity Index = 7,340			Activity Index = 3,980			Activity Index = 2,180		
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	530	7.21	6.99 - 9.99	800	7.49	6.49 - 9.49	510	8.22	5.99 - 8.99	430	6.31
Private Brand	6.99 - 10.99	310	7.29	6.49 - 7.49	380	7.43	6.99	230	6.99			
Category 2												
Processor Brand	4.89 - 6.99	1,050	5.81	4.99 - 5.99	1,460	5.31	4.49 - 4.99	490	4.95	5.99 - 6.99	260	6.26
Private Brand	4.99 - 6.98	90	6.10									
Category 3												
Processor Brand	2.99 - 3.99	160	3.69	4.38 - 5.99	60	5.76	3.59	50	3.59	5.99	20	5.99
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 5.49	80	4.47	3.29 - 3.99	40	3.55	2.49 - 3.99	150	3.57			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 5.49	70	4.28									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.49	230	7.46	6.99 - 9.99	340	7.49	7.99 - 8.49	30	8.12	5.99 - 11.99	200	6.26
Private Brand	6.98 - 7.99	90	7.91	5.99 - 7.99	170	6.95	7.99	250	7.99			
Category 2												
Processor Brand	4.99 - 5.99	50	5.19									
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.50	2,010	2.87	1.99 - 2.49	1,730	2.74	2.50 - 3.99	890	2.83	2.50 - 3.79	580	2.98
Private Brand	1.99 - 3.99	690	3.25	2.50 - 3.09	200	2.73	2.99	170	2.99			
Turkey 16 oz												
Processor Brand	4.98 - 5.99	390	5.45	3.50 - 4.99	280	4.59				5.99	110	5.99
Private Brand							4.99	170	4.99			
Chicken 7-10 oz												
Processor Brand	1.99 - 3.50	1,770	2.84	1.99 - 2.50	1,680	2.74	2.50 - 2.99	870	2.82	2.50 - 3.79	580	2.98
Private Brand	1.99 - 3.99	680	3.25	2.50 - 2.99	200	2.72	2.99	170	2.99			

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)