



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/20 thru 06/26.

Fri. Jun 20, 2014

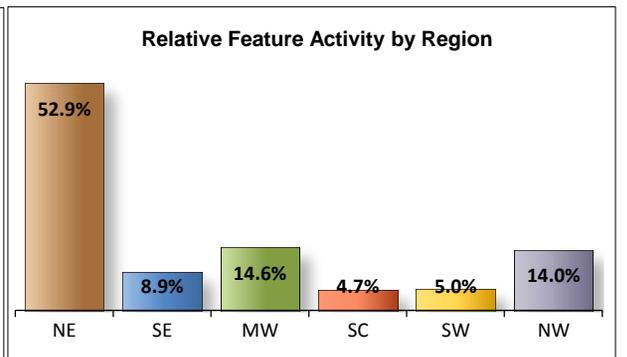
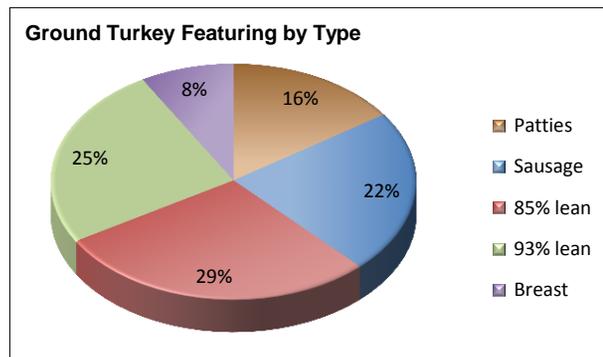
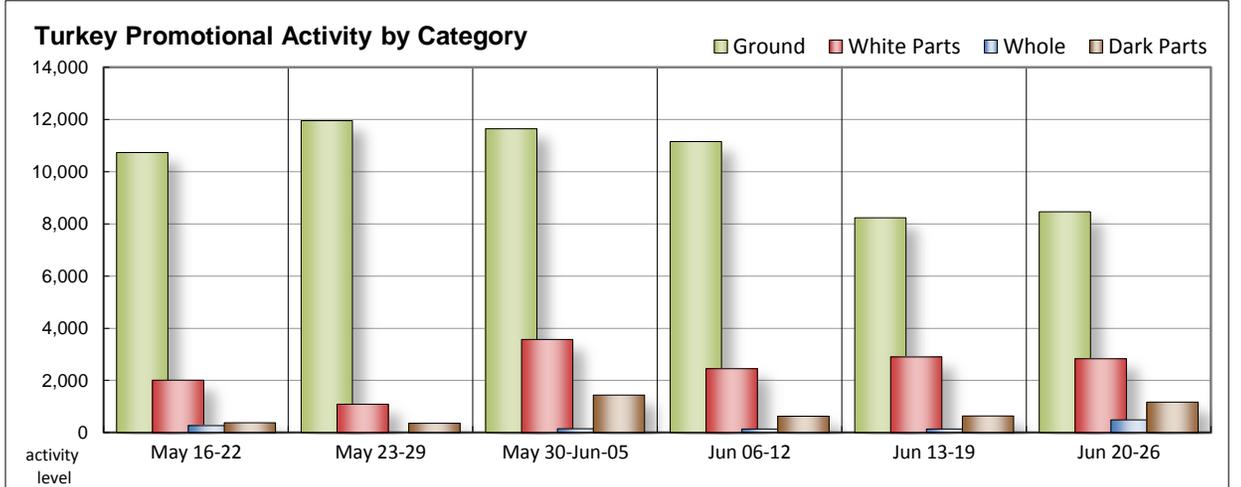
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	37.3% of 22,900 outlets		41.4% of 22,900 outlets		36.6% of 23,200 outlets	
Special Rate ^{4/}	1.5%		1.9%		1.7%	
Activity Index ^{2/}	13,880		13,900		14,270	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	420	1.19			210	1.05
" - Toms	70	1.26	140	0.99	100	1.11
PARTS:						
Breast:						
Bone-in, whole						
Fresh					20	2.79
Frozen	280	1.67	580	2.09	1,960	1.53
Split, bone-in						
Fresh	290	2.99			250	2.99
Rotisserie	40	7.49	40	8.66	460	9.11
Boneless, whole					190	5.94
Cutlets	960	4.72	800	4.89	1,080	4.48
Cutlets, thin sliced			180	4.99	370	5.71
Strips					20	3.59
Tenders	420	4.48	510	4.66	600	4.19
Marinated Tenders	840	4.08	790	4.33	200	4.24
Drumsticks	220	1.71	280	1.84	40	1.83
Thighs	90	1.78	20	1.87	10	1.79
Wings	40	1.79	270	1.84	50	1.93
Necks	20	1.93	50	1.99	20	1.74
Smoked Drumsticks	310	2.68	10	1.99	180	2.16
Smoked Wings	320	2.48	10	1.99	130	1.97
Smoked Necks	170	2.21				
GROUND TURKEY:	8,460	3.34	8,230	3.51	6,930	3.32
Patties	1,310	3.69	560	3.89	760	3.57
Sausage	1,900	3.57	760	3.48	1,370	3.49
85% lean	2,410	2.71	2,640	2.57	1,310	2.56
93% lean	2,130	3.36	1,850	3.43	2,660	3.23
Breast	710	4.46	2,420	4.98	830	4.59
Rolls (frsh/frz 1 lb.)	160	2.53	700	2.90	390	2.04
Specialty ^{5/}						
Patties	150	4.56			10	4.99
93-94% lean	570	4.26	380	5.36	440	4.15
Breast	50	6.59	910	6.48	610	5.98

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

This Week's Turkey Feature Highlights

Retail feature activity slows on turkey and deli items. Frozen hens are back in the circulars; fewer stores offer frozen toms. Offerings on frozen bone-in whole breasts decline in frequency and price, but this week there are also promotions on fresh split breasts, giving shoppers more options for bone-in breasts. Ads for rotisserie breasts continue to be barely visible. Offerings on white parts increase as stores include more cutlets and marinated tenders in this week's circulars. Once again, marinated tenders offer the best value. Feature activity increases on dark parts; fewer stores promote fresh dark parts, instead focusing on smoked parts. Prices are lower on the fresh parts, higher on the smoked parts. Featuring on ground turkey increases; the weighted average price is sharply lower due to fewer ads for ground breast. Offerings increase on patties, sausage and 93% lean. Deli feature activity slows on service and self-service, with the sharpest drop in self-service deli items.



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/}	74.4% of 4,700 sampled outlets 0.1% of stores w/ no-price promotions Activity Index = 8,190			30.7% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,880			31.9% of 4,200 sampled outlets 0.6% of stores w/ no-price promotions Activity Index = 2,050		
	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 - 1.29	350	1.17				0.99 - 1.39	60	1.30
" - Toms							0.99 - 1.39	60	1.30
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.99	80	1.99	1.19 - 1.99	50	1.85	0.97 - 1.99	130	1.41
Split, bone-in									
Fresh	2.99	290	2.99						
Rotisserie	8.99	10	8.99				6.99	30	6.99
Boneless, whole									
Cutlets	4.49 - 5.99	830	4.72	4.49 - 5.99	80	4.82	4.69	10	4.69
Cutlets, thin sliced									
Strips									
Tenders	4.49	400	4.49				4.69	10	4.69
Marinated Tenders	4.26	570	4.26	4.26	40	4.26	3.19 - 4.64	170	3.47
Drumsticks	1.59 - 1.69	150	1.68	1.69	40	1.69	1.69 - 1.99	30	1.86
Thighs							1.69 - 1.79	90	1.78
Wings	1.59	10	1.59				1.69 - 1.99	30	1.86
Necks							1.79 - 1.99	20	1.93
Smoked Drumsticks	1.99 - 2.99	290	2.74	1.79	20	1.79			
Smoked Wings	1.99 - 2.99	290	2.55	1.79	20	1.79	1.99	10	1.99
Smoked Necks	2.29	140	2.29	1.79	20	1.79	1.99	10	1.99
GROUND TURKEY:									
Patties	2.99 - 4.49	740	3.79	3.68	200	3.68	2.99 - 3.99	280	3.42
Sausage	2.99 - 4.49	1,600	3.59				3.19 - 3.99	180	3.35
85% lean	1.98 - 3.33	530	2.71	2.55 - 3.33	1,400	2.69	1.99 - 2.99	100	2.55
93% lean	2.30 - 3.84	1,160	3.34	2.99	10	2.99	2.74 - 3.59	390	3.17
Breast (99-100% lean)	4.61 - 5.38	120	5.00				4.16	180	4.16
Rolls (frsh/frz 1 lb.)	-						1.98 - 2.50	120	2.47
Specialty ^{5/}									
Patties	3.99 - 4.59	150	4.56						
93-94% lean	2.99 - 4.99	440	4.06				4.79 - 4.99	130	4.96
Breast	6.99	40	6.99				4.99	10	4.99



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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/}	21.8% of 4,200 sampled outlets			15.9% of 2,800 sampled outlets			45.1% 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 = 660			Activity Index = 510			Activity Index = 590		
	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	10	0.99			
" - Toms				0.99	10	0.99			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.89	10	1.89	1.39	10	1.39			
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets	4.59	40	4.59						
Cutlets, thin sliced									
Strips									
Tenders				3.99	10	3.99			
Marinated Tenders							3.99	60	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.59 - 3.99	80	3.64	3.99	10	3.99			
Sausage	3.35	70	3.35	3.99 - 4.69	30	4.48	3.27	20	3.27
85% lean	2.99	140	2.99	2.79 - 3.00	130	2.96	2.00 - 3.59	110	2.51
93% lean	2.24 - 3.19	130	3.07	2.99 - 4.23	270	3.46	3.19 - 4.39	170	3.98
Breast (99-100% lean)	4.16 - 4.39	150	4.23	6.15	30	6.15	3.99 - 5.58	230	4.34
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	40	2.70						
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 06/20 thru 06/26.

(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		71.6% of 4,700 sampled outlets Activity Index = 16,650			64.8% of 5,900 sampled outlets Activity Index = 8,630		
Feature Rate ^{1/}	63.9% of 22,900 stores		71.6% of 22,900 stores		74.1% of 23,200 stores							
Activity Index ^{2/}	42,970		54,530		48,120							
	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	4,740	8.33	6,650	8.35	4,330	7.98	6.98 - 12.99	2,150	8.41	6.99 - 9.99	1,240	8.37
Private Brand	1,950	8.22	3,310	7.80	2,030	7.53	6.99 - 8.99	1,530	8.34			
Category 2												
Processor Brand	3,120	6.04	4,620	5.68	4,910	5.81	4.99 - 6.99	930	6.24	4.99 - 6.99	390	6.37
Private Brand	5,900	7.13	3,200	6.65	4,510	7.17	4.99 - 7.99	2,130	6.71	6.49 - 7.99	220	6.80
Category 3												
Processor Brand	980	3.92	1,010	4.57	660	3.86	3.33 - 4.98	620	3.93	3.99 - 4.38	40	4.21
Private Brand	20	3.88	280	4.42	20	3.88	3.88	20	3.88			
Turkey Ham												
Processor Brand	200	4.04	340	4.16	340	3.57	3.98 - 4.99	130	4.28			
Private Brand	60	4.63			40	4.48	4.48 - 4.99	60	4.63			
Turkey Pastrami												
Processor Brand	30	4.32	180	5.30	340	4.36	4.99	10	4.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,880	7.61	2,870	8.33	2,580	8.06	5.99 - 10.49	1,220	7.98	6.99 - 9.99	1,790	7.46
Private Brand	2,460	7.48	2,910	8.11	1,660	6.88	6.99 - 8.49	2,170	7.48	8.49	20	8.49
Category 2												
Processor Brand	80	5.90	280	4.76	240	5.04						
Private Brand	440	6.15	360	5.98	10	5.98						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,080	3.40	11,760	3.31	10,790	2.77	2.49 - 3.99	2,390	3.14	2.35 - 3.99	2,350	3.65
Private Brand	810	2.83	1,680	3.23	2,180	3.48	2.50 - 3.29	220	3.01	2.79 - 3.50	90	2.95
Turkey 16 oz												
Processor Brand	1,780	5.25	2,070	4.47	920	4.81	4.49 - 6.99	590	5.50	4.99 - 5.49	80	5.03
Private Brand	110	5.58	170	4.99								
Chicken 7-10 oz												
Processor Brand	7,470	3.43	11,300	3.33	10,380	2.77	2.49 - 3.99	2,260	3.11	2.50 - 3.99	2,320	3.67
Private Brand	860	2.88	1,540	3.28	2,180	3.48	2.50 - 3.29	220	3.01	2.79 - 3.50	90	2.95

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)		
	63.6% of 4,200 sampled outlets			61.2% of 4,200 sampled outlets			49.5% of 2,800 sampled outlets			72.1% of 1,200 sampled outlets		
	Activity Index = 7,280			Activity Index = 4,890			Activity Index = 3,520			Activity Index = 2,000		
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 - 10.99	340	7.93	6.99 - 9.99	630	7.83	6.99 - 8.99	350	8.94	7.99 - 12.99	30	9.44
Private Brand	6.99 - 8.99	390	7.71	8.49	20	8.49	8.99	10	8.99			
Category 2												
Processor Brand	4.99 - 6.99	870	5.95	4.99 - 5.99	480	5.61	5.49 - 5.99	450	5.98			
Private Brand	4.98 - 8.99	1,220	6.37	6.49 - 6.99	1,080	7.74	7.99 - 8.99	590	8.46	5.99 - 8.99	660	7.84
Category 3												
Processor Brand	2.79 - 3.99	160	3.87	3.99 - 4.38	30	4.08	3.48 - 3.49	20	3.49	3.48 - 3.99	110	3.90
Private Brand												
Turkey Ham												
Processor Brand	3.49 - 3.69	20	3.60	3.39 - 3.49	30	3.42	3.59 - 3.99	20	3.87			
Private Brand												
Turkey Pastrami												
Processor Brand	3.98	20	3.98									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.49	440	6.82	6.99 - 9.49	390	8.05				6.99	40	6.99
Private Brand	6.98 - 10.99	170	7.51	6.99 - 7.99	100	7.22						
Category 2												
Processor Brand	5.49 - 5.99	80	5.90									
Private Brand	4.79 - 5.99	360	5.96							6.99	80	6.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	920	3.07	2.99 - 3.99	960	3.37	2.49 - 3.99	1,010	3.63	2.58 - 3.99	450	3.68
Private Brand	2.50 - 3.49	470	2.70	2.99 - 3.19	30	3.04						
Turkey 16 oz												
Processor Brand	4.49 - 5.99	580	5.13	3.99 - 5.99	360	4.92	5.00	60	5.00	4.99 - 5.99	110	5.91
Private Brand	4.49	30	4.49							5.99	80	5.99
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	680	3.11	2.99 - 3.99	760	3.55	2.49 - 3.99	1,010	3.63	2.58 - 3.99	440	3.69
Private Brand	2.50 - 3.49	530	2.82	2.99	20	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)

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