



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/03 thru 07/09.

Thu. Jul 03, 2014

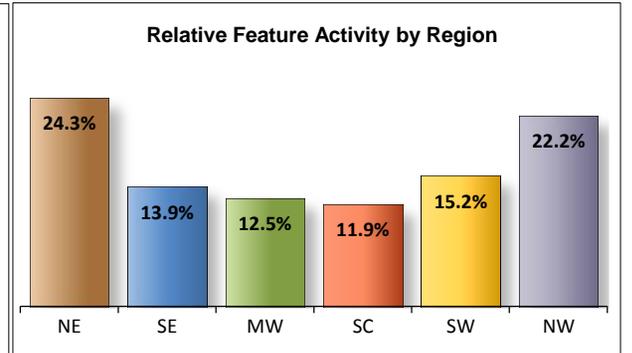
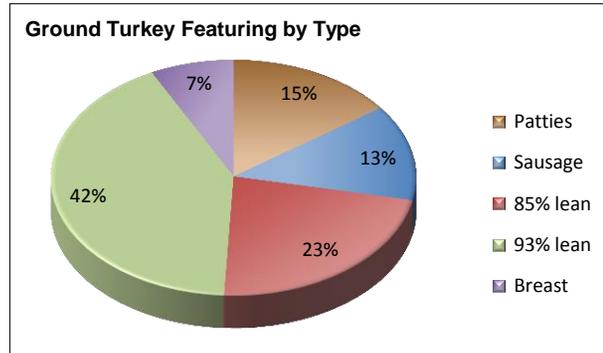
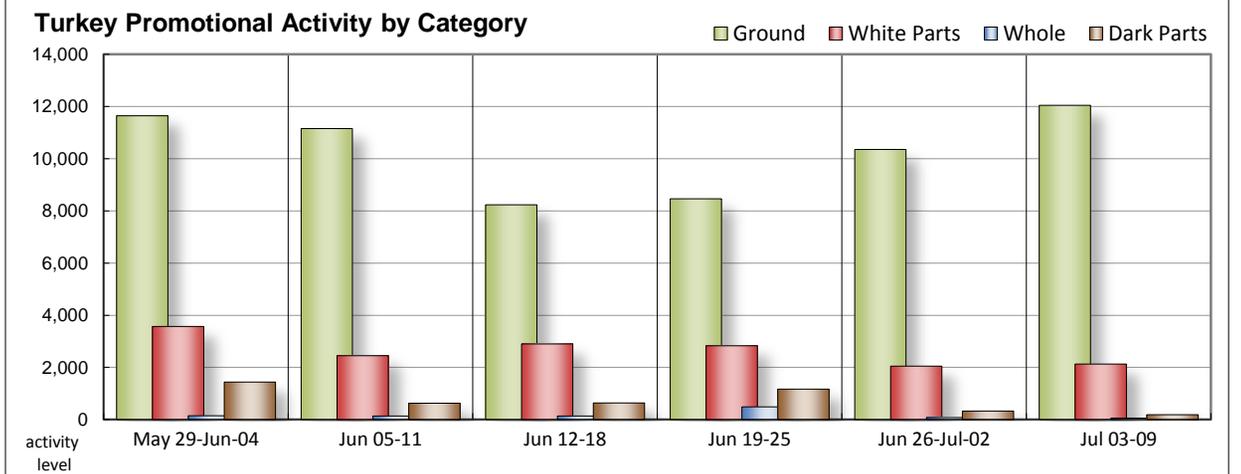
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	53.8% of 22,900 outlets		29.9% of 22,900 outlets		40.1% of 23,200 outlets	
Special Rate ^{4/}	5.0%		0.9%		5.3%	
Activity Index ^{2/}	16,440		13,650		12,750	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	10	1.78			30	1.69
" - Toms	10	1.78			30	1.69
Frozen - Hens	20	1.19	40	1.34	170	0.99
" - Toms	20	1.19	40	1.34		
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	1,220	1.92	540	1.80	350	1.66
Split, bone-in						
Fresh	50	3.19				
Rotisserie			140	8.99		
Boneless, whole	70	4.49				
Cutlets	250	5.54	660	4.79	370	5.28
Cutlets, thin sliced						
Strips						
Tenders	30	4.99	240	4.99	100	4.39
Marinated Tenders	510	4.60	470	4.32	400	4.60
Drumsticks	30	1.94	40	1.69	170	1.47
Thighs	10	2.28			100	1.79
Wings	20	1.79	100	2.48	150	2.36
Necks					10	1.29
Smoked Drumsticks	50	2.39	100	2.89	210	2.24
Smoked Wings	40	2.29	90	2.99	160	1.81
Smoked Necks	40	2.29			240	1.76
GROUND TURKEY:	12,040	3.33	10,350	3.38	9,870	3.27
Patties	1,810	3.51	2,400	3.55	1,450	3.38
Sausage	1,590	3.42	2,670	3.31	1,380	3.35
85% lean	2,720	2.65	1,400	2.85	3,710	2.78
93% lean	5,020	3.36	3,040	3.23	2,640	3.28
Breast	900	4.95	840	4.47	690	5.40
Rolls (frsh/frz 1 lb.)	300	2.42	640	3.10	140	1.96
Specialty ^{5/}						
Patties	440	4.64	30	4.00	30	4.45
93-94% lean	1,280	4.85	160	4.45	160	3.95
Breast			10	6.49	60	5.68

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

This Week's Turkey Feature Highlights

We are heading into the first of the month, and Fourth of July celebrations are providing a three day weekend for some people. Featuring increases on turkey and deli items and more stores are using special rate promotions this week. Fresh and frozen whole turkeys are barely visible in the circulars. Shoppers will have a better time finding specials on frozen bone-in breasts. Most of the ads on boneless white parts are focused on marinated tenders at higher prices. Fewer stores offer dark parts; prices are mixed. Ground turkey feature activity increases to a level not seen for several weeks. Offerings increase on 85% and 93% leans, decrease on the balance of grinds. Prices decline on 85% lean, increase on the balance of ground turkey. Specialty ground turkey featuring is active on 93-94% lean. Deli feature activity increases on service deli ans shows a slight declines on self-service.



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/}	56.8% of 4,700 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 4,900			72.3% of 5,900 sampled outlets 13.7% of stores w/ no-price promotions Activity Index = 3,820			43.9% of 4,200 sampled outlets 4.9% of stores w/ no-price promotions Activity Index = 2,300		
	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							1.78	10	1.78
" - Toms							1.78	10	1.78
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.99	80	1.99	1.59 - 1.99	60	1.88	1.29 - 1.99	110	1.62
Split, bone-in									
Fresh	2.99 - 3.49	50	3.19						
Rotisserie									
Boneless, whole									
Cutlets	5.49 - 5.99	200	5.59	4.99 - 5.99	50	5.33			
Cutlets, thin sliced									
Strips									
Tenders				4.99	30	4.99			
Marinated Tenders	4.53 - 5.06	330	4.65	4.53	60	4.53			
Drumsticks							1.69 - 2.28	30	1.94
Thighs							2.28	10	2.28
Wings							1.79	20	1.79
Necks									
Smoked Drumsticks				2.49	40	2.49	1.99	10	1.99
Smoked Wings				2.29	40	2.29			
Smoked Necks				2.29	40	2.29			
GROUND TURKEY:									
Patties	3.00 - 4.48	960	3.50	2.50 - 3.99	400	3.28	2.50 - 3.99	210	3.86
Sausage	2.45 - 5.79	690	3.58	3.50 - 3.79	30	3.61	2.99 - 3.52	500	3.30
85% lean	2.39 - 3.59	470	2.95	2.00 - 2.69	1,130	2.40	2.00 - 3.20	480	2.56
93% lean	2.92 - 4.39	1,080	3.56	3.07 - 3.50	1,810	3.32	2.91 - 3.50	730	3.25
Breast (99-100% lean)	4.99 - 6.24	620	5.09	4.99 - 5.38	80	5.08	4.58 - 4.79	30	4.70
Rolls (frsh/frz 1 lb.)				2.99	10	2.99	2.99	120	2.99
Specialty ^{5/}									
Patties	3.99 - 4.99	140	4.03				3.50	20	3.50
93-94% lean	3.99 - 5.00	280	4.32	5.00	40	5.00	5.00	10	5.00
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/}	30.9% of 4,200 sampled outlets			53.0% of 2,800 sampled outlets			66.1% of 1,200 sampled outlets		
Special Rate ^{4/}	3.4% 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 = 2,180			Activity Index = 2,020			Activity Index = 1,220		
	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	1.19	20	1.19						
" - Toms	1.19	20	1.19						
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.69	100	1.63	1.99	550	1.99	1.99	320	1.99
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole	4.49	50	4.49				4.49	20	4.49
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.26	50	4.26				4.66	70	4.66
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.49 - 3.99	200	3.63				3.49	40	3.49
Sausage	2.63 - 3.99	370	3.28						
85% lean	2.79 - 2.99	350	2.87				2.79	40	2.79
93% lean	2.92 - 3.49	680	3.17	2.80 - 4.23	450	3.29	3.19 - 4.39	270	3.69
Breast (99-100% lean)				4.79 - 6.15	40	5.84	3.99	130	3.99
Rolls (frsh/frz 1 lb.)				1.99	170	1.99			
Specialty ^{5/}									
Patties				5.00 - 5.99	280	5.03			
93-94% lean	5.00	340	5.00	5.00	280	5.00	5.00	330	5.00
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 07/03 thru 07/09.

(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		70.8% of 4,700 sampled outlets Activity Index = 12,010			76.3% of 5,900 sampled outlets Activity Index = 8,200		
Feature Rate ^{1/}	67.9% of 22,900 stores		68.8% of 22,900 stores		72.0% of 23,200 stores		Price Range (\$/pound)			Price Range (\$/pound)		
Activity Index ^{2/}	39,790		37,650		45,660		Summary Stores Wtd Avg			Summary Stores Wtd Avg		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,990	8.09	4,820	8.06	4,280	7.77	5.99 - 9.99	1,580	8.18	6.99 - 8.99	1,600	8.19
Private Brand	3,240	7.39	3,530	7.45	2,670	7.22	6.98 - 8.99	2,590	7.11			
Category 2												
Processor Brand	3,330	5.57	3,620	5.84	5,940	5.68	4.99 - 6.99	770	5.54	4.99 - 6.99	420	5.56
Private Brand	2,470	7.62	1,070	5.75	1,110	6.34	5.98 - 7.99	600	6.80	4.99 - 7.99	130	7.19
Category 3												
Processor Brand	740	4.39	700	4.40	1,740	4.16	3.99 - 4.99	390	4.79	3.99 - 4.58	60	4.25
Private Brand	50	4.98	220	5.07	330	5.07	4.98	40	4.98			
Turkey Ham												
Processor Brand	260	3.82	390	4.33	240	3.90	3.49 - 5.49	200	3.88			
Private Brand												
Turkey Pastrami												
Processor Brand	30	5.16	320	3.97	150	4.65	3.79	10	3.79	7.99	10	7.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,790	8.38	1,950	8.44	4,980	7.90	5.99 - 9.99	1,460	8.65	7.99 - 9.99	830	8.23
Private Brand	1,280	7.63	390	7.39	1,350	7.41	7.49 - 7.99	1,010	7.98			
Category 2												
Processor Brand	250	5.09	80	5.00	90	5.17	4.99	70	4.99	4.99	30	4.99
Private Brand	70	6.31	170	5.92	60	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	6,990	3.20	9,540	3.14	9,680	2.89	2.50 - 3.99	1,450	3.57	2.35 - 3.99	1,710	2.82
Private Brand	3,680	2.69	910	2.98	1,570	3.70	2.99	220	2.99	2.50 - 2.69	1,300	2.53
Turkey 16 oz												
Processor Brand	570	5.45	1,260	5.51	580	4.85	5.99 - 6.49	70	6.09	5.99 - 6.49	230	6.45
Private Brand												
Chicken 7-10 oz												
Processor Brand	6,600	3.20	7,810	3.23	9,380	2.90	2.50 - 3.99	1,330	3.54	2.50 - 3.99	1,660	2.83
Private Brand	2,450	2.78	870	3.00	1,510	3.74	2.99	220	2.99	2.50 - 2.69	220	2.67

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)		
	66.3% of 4,200 sampled outlets			60.0% of 4,200 sampled outlets			61.5% of 2,800 sampled outlets			62.9% of 1,200 sampled outlets		
	Activity Index = 7,900			Activity Index = 5,930			Activity Index = 3,840			Activity Index = 1,910		
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	6.89 - 10.99	1,040	7.58	6.99 - 10.99	710	8.22	7.49 - 8.99	30	8.59	9.99 - 12.49	30	11.59
Private Brand	6.99 - 10.99	240	8.58	6.49 - 8.49	280	7.91	9.49	130	9.49			
Category 2												
Processor Brand	4.94 - 6.99	1,030	5.76	4.99 - 6.99	470	5.81	4.99 - 5.99	620	5.12	5.99	20	5.99
Private Brand	5.99 - 8.99	360	6.25	6.49 - 8.99	400	8.35	7.99 - 8.99	550	8.50	5.99 - 8.99	430	8.27
Category 3												
Processor Brand	2.99 - 4.79	110	4.01	3.29 - 3.99	80	3.85	3.59	50	3.59	3.98 - 3.99	50	3.99
Private Brand	4.99	10	4.99									
Turkey Ham												
Processor Brand	3.69	10	3.69	3.49	10	3.49	3.49 - 3.69	40	3.64			
Private Brand												
Turkey Pastrami												
Processor Brand	3.69	10	3.69									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.39 - 9.49	390	7.88	6.99 - 8.99	100	7.76	8.49	10	8.49			
Private Brand	5.99 - 7.99	230	6.19	5.99 - 7.99	40	7.19						
Category 2												
Processor Brand	4.79 - 5.88	140	5.17	4.99	10	4.99						
Private Brand	5.99 - 6.49	40	6.18	6.49	30	6.49						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.99	1,470	2.96	2.49 - 3.00	980	3.18	2.49 - 3.99	900	3.45	2.98 - 3.99	480	3.68
Private Brand	2.29 - 2.69	750	2.65	2.69 - 3.99	880	2.86	2.50 - 2.69	320	2.52	2.69 - 3.00	210	2.98
Turkey 16 oz												
Processor Brand	4.98 - 4.99	90	4.98	3.50 - 5.49	180	4.15						
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 3.99	1,350	3.00	2.49 - 3.00	880	3.21	2.49 - 3.99	900	3.45	2.98 - 3.99	480	3.68
Private Brand	2.29 - 2.69	630	2.68	2.69 - 3.99	880	2.85	2.50 - 2.69	290	2.53	2.69 - 3.00	210	2.98

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)