



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/11 thru 07/17.

Fri. Jul 11, 2014

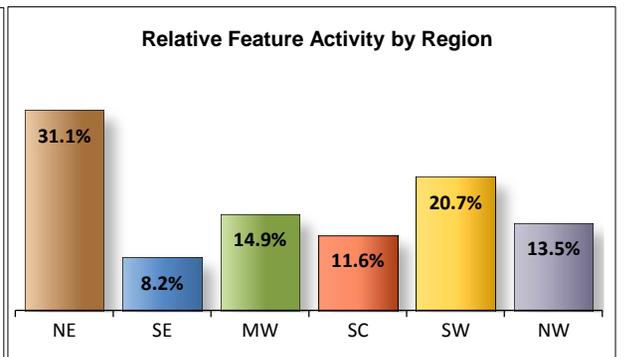
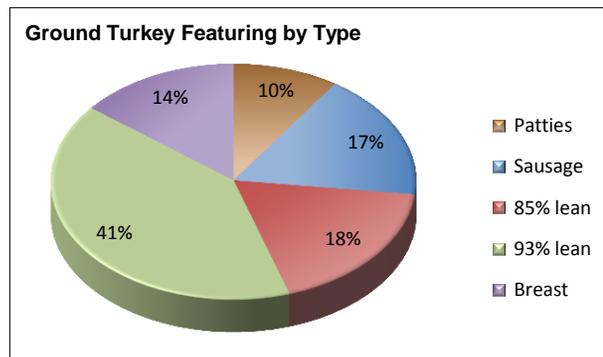
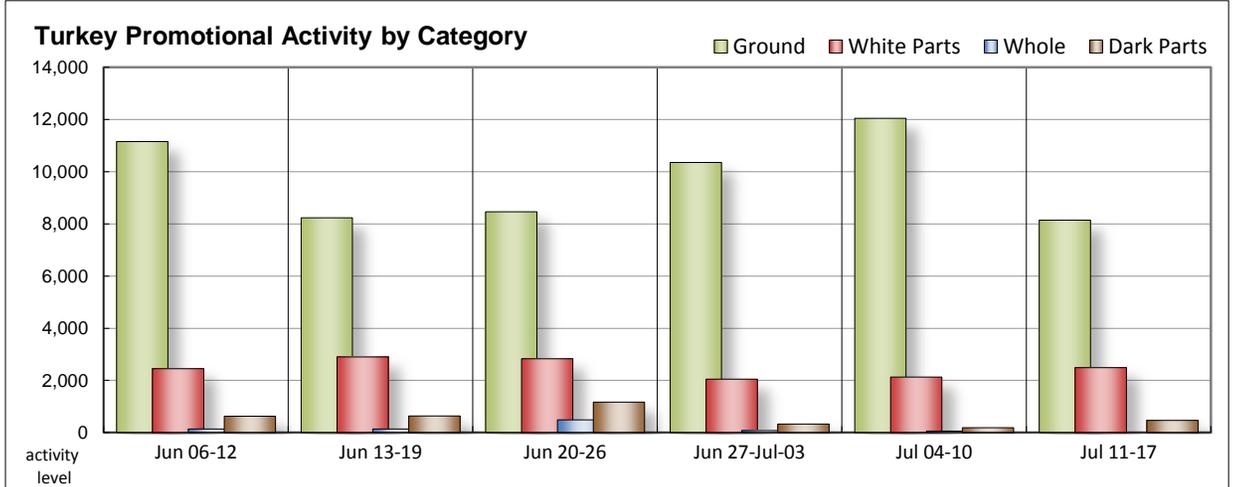
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	33.5% of 22,900 outlets		53.8% of 22,900 outlets		42.9% of 23,200 outlets	
Special Rate ^{4/}	1.3%		5.0%		5.4%	
Activity Index ^{2/}	12,280		16,440		13,400	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			10	1.78		
" - Toms			10	1.78		
Frozen - Hens			20	1.19		
" - Toms			20	1.19		
PARTS:						
Breast:						
Bone-in, whole						
Fresh					30	2.59
Frozen	450	1.43	1,220	1.92	180	1.47
Split, bone-in						
Fresh			50	3.19		
Rotisserie	420	6.80			610	7.57
Boneless, whole	220	4.85	70	4.49	90	5.36
Cutlets	700	5.08	250	5.54	570	5.14
Cutlets, thin sliced	100	5.17			100	4.99
Strips	10	4.59			300	4.81
Tenders	120	4.36	30	4.99	460	4.75
Marinated Tenders	470	4.32	510	4.60	1,430	4.31
Drumsticks	150	1.76	30	1.94	10	1.29
Thighs	50	2.29	10	2.28		
Wings	60	1.95	20	1.79	20	1.74
Necks	40	1.73			10	1.29
Smoked Drumsticks	50	2.91	50	2.39	50	1.95
Smoked Wings	90	2.42	40	2.29	50	1.95
Smoked Necks	30	1.99	40	2.29	40	1.94
GROUND TURKEY:	8,140	3.43	12,040	3.33	8,550	3.46
Patties	770	2.93	1,810	3.51	1,310	3.34
Sausage	1,420	3.21	1,590	3.42	1,780	3.22
85% lean	1,480	2.70	2,720	2.65	1,440	2.63
93% lean	3,300	3.57	5,020	3.36	2,390	3.15
Breast	1,170	4.73	900	4.95	1,630	4.81
Rolls (frsh/frz 1 lb.)	180	2.39	300	2.42	260	2.49
Specialty ^{5/}						
Patties	70	3.69	440	4.64	90	3.98
93-94% lean	900	4.80	1,280	4.85	490	4.02
Breast	30	6.19			60	6.17

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

This Week's Turkey Feature Highlights

Retail feature activity slows on turkey items, increases on deli items. Fresh and frozen whole turkeys are absent from this week's circulars, not surprising for this time of the year. Fewer stores offer frozen bone-in breasts but prices are sharply lower; this would be a good time to take one home for later use. Finally stores are promoting rotisserie breasts; ads are present in multiple regions at prices that are sure to tempt shoppers. Boneless white parts are fully represented in this week's ads; prices are mostly lower. Cutlets are heavily promoted; marinated tenders are the most competitively priced boneless white part. Offerings increase on dark parts; prices are mostly higher. Post-holiday featuring slows on ground turkey. Feature activity declines on all of the grinds with the exception of ground breast. Deli activity increases on service and self-service deli items. Over half the ads for service deli are on private label deli this week; prices are mixed. Advertised prices on self-service deli items are mostly higher.



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/}	53.8% of 4,700 sampled outlets 6.3% of stores w/ no-price promotions Activity Index = 4,560			24.0% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,640			30.4% of 4,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,990		
	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									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.38 - 1.69	90	1.44	1.29 - 1.38	30	1.36	1.39 - 1.89	120	1.51
Split, bone-in									
Fresh									
Rotisserie	5.99	140	5.99						
Boneless, whole	4.99	160	4.99						
Cutlets	4.59 - 5.49	680	5.10				3.98 - 4.99	20	4.67
Cutlets, thin sliced	4.99	40	4.99						
Strips	4.59	10	4.59						
Tenders							3.98 - 3.99	70	3.99
Marinated Tenders	3.73 - 4.53	210	4.36	4.59	40	4.59	4.26	200	4.26
Drumsticks	1.59 - 2.29	80	1.83	1.59	40	1.59	1.49 - 1.99	30	1.81
Thighs	2.29	50	2.29						
Wings	2.29	20	2.29	1.69	10	1.69	1.49 - 1.99	30	1.81
Necks				1.29	10	1.29	1.69 - 1.99	30	1.88
Smoked Drumsticks	2.59	10	2.59						
Smoked Wings	2.49 - 2.59	70	2.51	2.29	10	2.29	1.99	10	1.99
Smoked Necks	1.99	20	1.99				1.99	10	1.99
GROUND TURKEY:									
Patties	2.49 - 3.29	530	2.52	2.49	60	2.49	3.49 - 3.99	20	3.79
Sausage	2.49 - 3.99	450	3.17	3.03 - 3.99	310	3.15	3.19 - 4.29	260	3.64
85% lean	2.66 - 3.07	90	2.93	2.50 - 3.00	330	2.72	1.99 - 2.74	300	2.55
93% lean	3.07 - 4.99	940	3.49	2.49 - 3.98	740	3.72	2.49 - 3.99	360	3.60
Breast (99-100% lean)	4.59 - 5.38	510	4.79	4.99	40	4.99	4.49 - 4.99	240	4.72
Rolls (frsh/frz 1 lb.)				2.50	10	2.50	3.39 - 3.99	40	3.68
Specialty ^{5/}									
Patties	3.69	70	3.69						
93-94% lean	3.99 - 4.99	390	4.58	3.99	10	3.99	3.99 - 4.99	230	4.49
Breast							5.99	20	5.99



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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/}	23.6% of 4,200 sampled outlets			39.3% of 2,800 sampled outlets			33.2% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% 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 = 1,550			Activity Index = 2,000			Activity Index = 540		
	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									
Frozen	1.29 - 1.59	150	1.42	1.29	40	1.29	1.29	20	1.29
Split, bone-in									
Fresh									
Rotisserie	7.99	90	7.99	5.99 - 7.99	190	6.83			
Boneless, whole	4.49	30	4.49				4.49	30	4.49
Cutlets									
Cutlets, thin sliced							5.29	60	5.29
Strips									
Tenders	4.99	40	4.99	4.39	10	4.39			
Marinated Tenders							3.99	20	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks	2.99	40	2.99						
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.00	50	3.00	4.99	110	4.99			
Sausage	3.67	40	3.67	2.45 - 4.09	360	2.94			
85% lean	2.66 - 2.99	340	2.98	2.39 - 2.66	420	2.50			
93% lean	2.49 - 3.43	480	3.54	2.99 - 3.99	460	3.42	2.50 - 5.59	320	3.66
Breast (99-100% lean)	4.08 - 4.99	290	4.78				3.99 - 4.39	90	4.08
Rolls (frsh/frz 1 lb.)				1.99	130	1.99			
Specialty ^{5/}									
Patties									
93-94% lean				4.59 - 5.49	270	5.43			
Breast				6.59	10	6.59			



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 07/11 thru 07/17.

(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		83.0% of 4,700 sampled outlets			76.0% of 5,900 sampled outlets		
Feature Rate ^{1/}	68.7% of 22,900 stores		67.9% of 22,900 stores		72.5% of 23,200 stores		Activity Index = 14,150			Activity Index = 12,870		
Activity Index ^{2/}	49,170		39,790		44,640		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	4,510	8.10	4,990	8.09	6,520	8.18	6.98 - 12.99	2,470	8.24	6.99 - 8.99	590	7.82
Private Brand	3,790	7.44	3,240	7.39	740	7.46	6.47 - 9.99	1,600	7.70	6.49 - 7.99	1,570	6.97
Category 2												
Processor Brand	2,520	5.96	3,330	5.57	3,890	5.94	4.99 - 6.99	630	5.89	4.99 - 6.99	200	6.39
Private Brand	5,020	6.39	2,470	7.62	4,680	7.26	4.99 - 6.99	1,160	5.25	5.99 - 6.99	260	6.50
Category 3												
Processor Brand	1,330	3.98	740	4.39	1,870	4.02	2.99 - 4.99	250	3.97	2.99 - 4.38	160	3.43
Private Brand	1,330	4.93	50	4.98	80	5.48	3.99 - 5.48	310	4.77	4.99	1,010	4.99
Turkey Ham												
Processor Brand	670	3.66	260	3.82	670	3.46	3.79 - 4.99	210	4.61	4.99	20	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	410	4.33	30	5.16	320	4.24	3.49 - 4.99	300	4.24	3.49 - 4.99	60	4.09
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,920	8.16	2,790	8.38	3,120	7.28	6.49 - 9.99	1,330	8.64	5.99 - 9.99	350	8.79
Private Brand	1,640	7.46	1,280	7.63	760	7.72	6.98 - 7.99	870	7.11	7.99	500	7.99
Category 2												
Processor Brand	220	5.01	250	5.09	140	5.38						
Private Brand	1,340	5.16	70	6.31	140	5.99	4.99	100	4.99	4.99	1,010	4.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,780	3.35	6,990	3.20	6,540	3.08	2.50 - 4.19	1,700	3.68	1.97 - 4.19	2,210	3.46
Private Brand	2,230	3.13	3,680	2.69	2,650	3.55	2.79 - 3.50	700	3.08	2.50 - 3.50	820	3.29
Turkey 16 oz												
Processor Brand	1,640	5.04	570	5.45	3,630	5.06	4.99	120	4.99	3.99 - 5.49	1,230	4.99
Private Brand	170	4.99										
Chicken 7-10 oz												
Processor Brand	8,480	3.37	6,600	3.20	6,320	3.09	2.50 - 4.19	1,700	3.67	2.50 - 4.19	2,060	3.51
Private Brand	2,170	3.14	2,450	2.78	2,570	3.57	2.79 - 3.50	700	3.08	2.50 - 3.50	820	3.29

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)		
	64.0% of 4,200 sampled outlets			58.0% of 4,200 sampled outlets			50.1% of 2,800 sampled outlets			72.8% of 1,200 sampled outlets		
	Activity Index = 8,710			Activity Index = 6,460			Activity Index = 4,350			Activity Index = 2,630		
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 - 9.99	420	7.74	6.49 - 10.99	340	8.26	6.99 - 8.99	380	7.79	6.99 - 12.99	310	8.19
Private Brand	6.99 - 10.99	230	8.29	6.49 - 8.49	390	7.78						
Category 2												
Processor Brand	4.99 - 6.99	1,200	6.01	4.99 - 6.49	340	5.57	4.99 - 6.99	70	6.02	5.49 - 6.99	80	6.26
Private Brand	4.99 - 6.99	1,400	6.07	5.99 - 7.99	930	7.03	6.99 - 7.99	800	7.38	6.99 - 7.99	470	7.16
Category 3												
Processor Brand	2.99 - 4.99	460	4.27	2.99 - 4.49	400	3.94	3.59	50	3.59	2.99	10	2.99
Private Brand	3.98	10	3.98									
Turkey Ham												
Processor Brand	3.69 - 4.49	20	4.05	2.99	120	2.99	2.89 - 3.79	300	3.14			
Private Brand												
Turkey Pastrami												
Processor Brand	4.48 - 6.99	50	5.13									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.49	740	7.36	5.99 - 8.49	420	7.67	7.99 - 8.49	20	8.19	6.99	60	6.99
Private Brand	6.98 - 7.99	150	7.89	5.99 - 7.99	120	7.25						
Category 2												
Processor Brand	3.99 - 5.99	220	5.01									
Private Brand	5.98 - 5.99	190	5.99	5.99	40	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.99	1,550	2.91	2.00 - 3.19	1,600	3.17	2.49 - 3.99	870	3.47	2.50 - 3.99	850	3.39
Private Brand	2.99 - 3.99	160	3.66	2.99 - 3.33	110	3.16	2.49 - 3.00	440	2.75			
Turkey 16 oz												
Processor Brand	4.98 - 5.99	230	5.33	4.47 - 5.99	60	5.07						
Private Brand							4.99	170	4.99			
Chicken 7-10 oz												
Processor Brand	1.99 - 3.99	1,520	2.90	2.00 - 3.19	1,480	3.22	2.49 - 3.99	870	3.47	2.50 - 3.99	850	3.39
Private Brand	2.99 - 3.99	160	3.66	2.99 - 3.33	110	3.15	2.49 - 2.99	380	2.71			

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)