



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/18 thru 07/24.

Fri. Jul 18, 2014

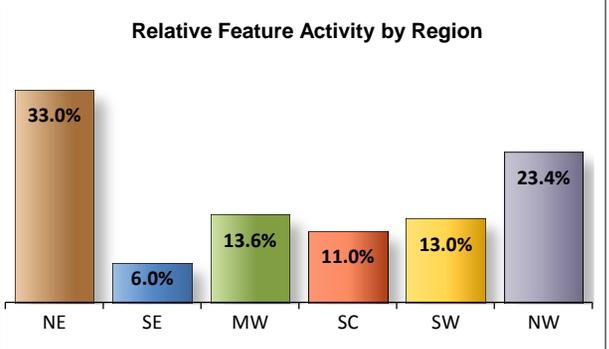
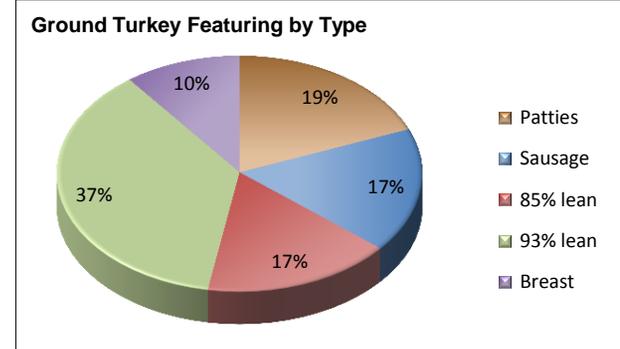
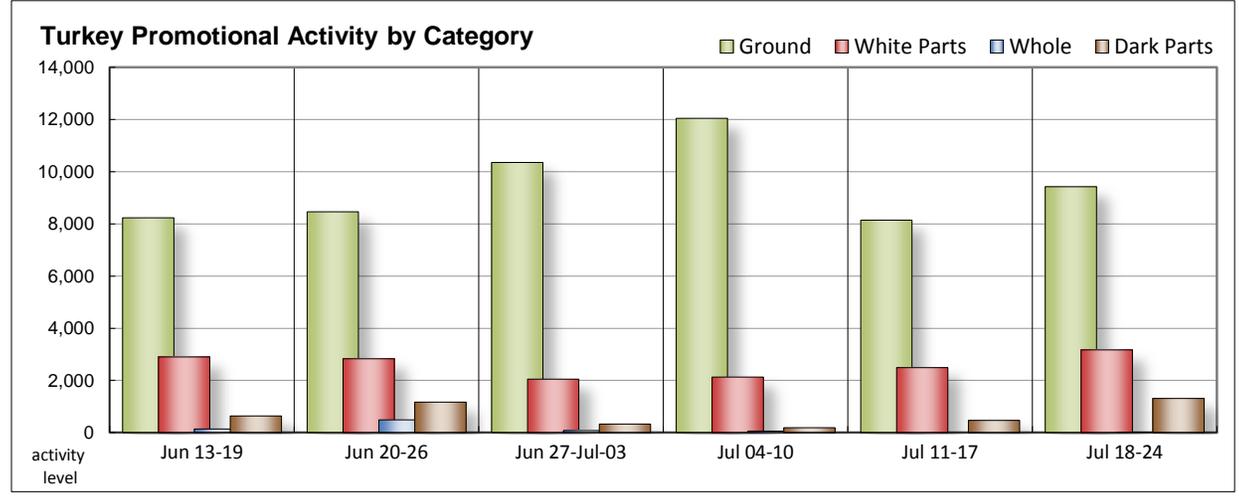
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY			
	THIS WEEK	LAST WEEK	LAST YEAR
Feature Rate ^{1/}	45.7% of 22,900 outlets	33.5% of 22,900 outlets	37.0% of 23,200 outlets
Special Rate ^{4/}	0.1%	1.3%	2.0%
Activity Index ^{2/}	18,240	12,280	14,080
3/	Stores Wtd Avg	Stores Wtd Avg	Stores Wtd Avg
WHOLE BIRDS:			
Fresh - Hens			
" - Toms			
Frozen - Hens	10 1.09		
" - Toms	10 1.09		
PARTS:			
Breast:			
Bone-in, whole			
Fresh			20 2.49
Frozen	940 1.65	450 1.43	810 1.63
Split, bone-in			
Fresh	330 3.05		250 2.99
Rotisserie	470 7.79	420 6.80	840 7.49
Boneless, whole	60 5.24	220 4.85	180 4.99
Cutlets	510 5.03	700 5.08	830 4.25
Cutlets, thin sliced	10 4.99	100 5.17	
Strips		10 4.59	170 4.99
Tenders	320 4.60	120 4.36	970 4.44
Marinated Tenders	530 3.90	470 4.32	400 4.82
Drumsticks	270 1.79	150 1.76	290 1.95
Thighs	20 2.34	50 2.29	180 1.99
Wings	120 1.89	60 1.95	300 1.98
Necks	30 1.86	40 1.73	10 1.39
Smoked Drumsticks	290 2.56	50 2.91	10 1.89
Smoked Wings	290 2.43	90 2.42	10 1.89
Smoked Necks	290 2.36	30 1.99	10 1.89
GROUND TURKEY:	9,420 3.50	8,140 3.43	7,940 3.41
Patties	1,790 3.52	770 2.93	770 3.24
Sausage	1,610 3.72	1,420 3.21	1,070 3.50
85% lean	1,570 2.84	1,480 2.70	760 2.67
93% lean	3,470 3.49	3,300 3.57	4,510 3.24
Breast	980 4.64	1,170 4.73	830 4.97
Rolls (frsh/frz 1 lb.)	2,000 2.82	180 2.39	260 2.43
Specialty ^{5/}			
Patties	10 4.22	70 3.69	180 4.36
93-94% lean	1,060 4.34	900 4.80	390 4.66
Breast	1,250 6.47	30 6.19	30 6.99

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

This Week's Turkey Feature Highlights

Feature activity is sharply higher and shoppers will find a wide selection to choose from this week. There continues to be a seasonally light interest in promoting whole turkeys. Offerings increase on frozen bone-in breasts; prices are higher. Fresh bone-in split breasts are in this week's circulars, perfect for a weekend grill out. Don't want to cook? There are more ads for rotisserie breasts, although advertised prices are sharply higher. Fewer stores are featuring boneless white parts. The best bets are cutlets and marinated tenders; feature activity is higher and prices are lower on those two items. More stores are promoting dark parts, especially smoked parts; prices are mixed. Offerings increase on ground turkey. Featuring increases on all the grinds with the exception of ground breast. Offerings of rolls are sharply higher and promotional activity increases on specialty grinds. Increased feature activity on self-service deli more than made up for the decline in service deli promotions. The decline in service deli promotions is due to fewer ads for private brands. Not only are there more ads on self-service deli items, advertised prices are mostly lower.



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/}	71.2% of 4,700 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 7,660			24.6% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,910			44.6% of 4,200 sampled outlets 0.7% of stores w/ no-price promotions Activity Index = 2,870		
	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							1.09	10	1.09
" - Toms							1.09	10	1.09
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.69	100	1.69	1.29 - 1.79	20	1.57	1.27 - 1.99	250	1.64
Split, bone-in									
Fresh	2.99	290	2.99						
Rotisserie	4.99 - 7.99	360	7.39	7.99	20	7.99	9.99	30	9.99
Boneless, whole	4.99 - 5.49	60	5.24						
Cutlets	4.99 - 5.99	240	5.47	5.99	20	5.99	4.49 - 5.44	130	4.54
Cutlets, thin sliced									
Strips									
Tenders							4.49 - 4.79	130	4.51
Marinated Tenders	3.73 - 4.26	530	3.90						
Drumsticks	1.69 - 1.79	210	1.72				1.69 - 2.39	50	2.05
Thighs							2.19 - 2.39	20	2.34
Wings	1.79	70	1.79				1.69 - 2.39	50	2.03
Necks							1.69 - 1.99	30	1.86
Smoked Drumsticks	2.49 - 2.68	290	2.56						
Smoked Wings	2.29 - 2.68	290	2.43						
Smoked Necks	2.19 - 2.68	290	2.36						
GROUND TURKEY:									
Patties	2.49 - 3.99	1,230	3.42	2.49 - 3.50	50	2.79	2.99 - 4.19	390	3.62
Sausage	2.79 - 4.49	1,140	3.77	3.29 - 3.99	130	3.88	3.19 - 4.29	50	3.68
85% lean	2.66 - 3.33	410	2.94	2.39 - 3.50	520	2.90	2.33 - 3.50	370	2.76
93% lean	2.59 - 3.99	1,310	3.29	2.59 - 3.74	440	3.13	3.19 - 4.00	300	3.50
Breast (99-100% lean)	4.61 - 5.59	140	4.95	4.61	40	4.61	3.99 - 4.79	120	4.06
Rolls (frsh/frz 1 lb.)				2.99	410	2.99	1.99 - 2.99	790	2.82
Specialty ^{5/}									
Patties	3.99 - 4.49	10	4.22						
93-94% lean	3.99 - 5.99	670	4.54	3.99	260	3.99	3.99	130	3.99
Breast	5.49	20	5.49				6.49	10	6.49



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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/}	44.3% of 4,200 sampled outlets			43.7% of 2,800 sampled outlets			63.3% 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 = 2,330			Activity Index = 1,990			Activity Index = 1,480		
	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	1.49 - 1.79	290	1.60	1.69	280	1.69			
Split, bone-in									
Fresh	3.49	40	3.49						
Rotisserie				8.99	60	8.99			
Boneless, whole									
Cutlets	4.49 - 4.59	110	4.53				4.49	10	4.49
Cutlets, thin sliced							4.99	10	4.99
Strips									
Tenders	4.49	70	4.49	4.79	110	4.79	4.49	10	4.49
Marinated Tenders									
Drumsticks							1.99	10	1.99
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.99	50	3.99	4.99	70	4.99
Sausage	2.99 - 3.00	160	3.00	4.89	20	4.89	3.27 - 4.09	110	3.83
85% lean	2.22 - 3.50	230	2.63	2.79 - 3.19	20	3.02	2.79	20	2.79
93% lean	2.39 - 4.00	580	3.54	3.19 - 4.00	350	3.89	3.33 - 4.29	490	3.98
Breast (99-100% lean)	4.39	30	4.39	4.79	300	4.79	3.99 - 4.99	350	4.60
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	480	2.58	2.99	250	2.99	2.99	70	2.99
Specialty ^{5/}									
Patties									
93-94% lean									
Breast	6.49	340	6.49	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 07/18 thru 07/24.

(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		87.2% of 4,700 sampled outlets			80.3% of 5,900 sampled outlets		
Feature Rate ^{1/}	76.7% of 22,900 stores		68.7% of 22,900 stores		75.6% of 23,200 stores		Activity Index = 18,630			Activity Index = 12,430		
Activity Index ^{2/}	54,980		49,170		47,880		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	4,810	7.75	4,510	8.10	2,830	8.06	6.99 - 10.49	1,380	8.06	6.99 - 8.99	830	7.40
Private Brand	1,570	8.31	3,790	7.44	1,340	7.97	6.99 - 8.99	1,290	8.55	6.99	220	6.99
Category 2												
Processor Brand	3,680	5.80	2,520	5.96	5,880	5.80	4.99 - 6.99	1,460	5.69	4.99 - 5.99	450	5.38
Private Brand	3,790	7.18	5,020	6.39	3,570	7.02	5.99 - 6.99	2,570	6.97	6.99	40	6.99
Category 3												
Processor Brand	2,090	4.20	1,330	3.98	1,030	3.82	3.69 - 4.99	940	4.12	3.99 - 4.59	130	4.35
Private Brand	150	4.30	1,330	4.93	1,300	4.99	3.98 - 4.98	150	4.30			
Turkey Ham												
Processor Brand	630	3.45	670	3.66	410	3.78	3.49 - 4.48	220	3.99	2.99	40	2.99
Private Brand					40	4.48						
Turkey Pastrami												
Processor Brand	130	4.51	410	4.33	330	4.28	3.49 - 4.59	70	4.44			
Private Brand	120	5.99										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4,610	8.13	2,920	8.16	2,600	7.60	6.48 - 9.99	1,830	8.46	6.99 - 9.99	2,050	8.11
Private Brand	1,730	7.60	1,640	7.46	770	7.11	6.99 - 7.99	1,640	7.59			
Category 2												
Processor Brand	440	5.09	220	5.01	210	5.85	4.99 - 5.99	150	5.05			
Private Brand	350	5.99	1,340	5.16	1,430	5.02						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,710	3.16	8,780	3.35	5,580	3.05	2.00 - 4.00	2,470	3.22	2.00 - 4.00	3,200	3.31
Private Brand	3,220	3.04	2,230	3.13	6,590	3.07	2.00 - 3.50	1,050	3.18	2.00 - 3.99	580	2.63
Turkey 16 oz												
Processor Brand	3,920	5.22	1,640	5.04	2,520	4.95	4.69 - 5.99	450	5.31	4.99 - 5.50	1,140	5.47
Private Brand	170	4.99	170	4.99								
Chicken 7-10 oz												
Processor Brand	9,720	3.18	8,480	3.37	4,870	3.03	2.00 - 4.00	1,970	3.35	2.00 - 4.00	3,180	3.31
Private Brand	3,140	3.04	2,170	3.14	6,580	3.07	2.00 - 3.50	990	3.19	2.00 - 3.99	570	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)		
	75.9% of 4,200 sampled outlets			68.5% of 4,200 sampled outlets			64.4% of 2,800 sampled outlets			77.5% of 1,200 sampled outlets		
	Activity Index = 9,670			Activity Index = 7,700			Activity Index = 4,240			Activity Index = 2,310		
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 - 10.99	910	7.40	6.99 - 10.49	950	7.88	6.49 - 7.99	410	7.71	6.99 - 8.99	330	8.00
Private Brand	7.99 - 10.99	40	8.67	6.49	20	6.49						
Category 2												
Processor Brand	4.98 - 6.99	970	5.90	5.99 - 6.99	280	6.15	4.99 - 6.99	460	6.17	4.99 - 5.99	60	5.23
Private Brand	6.49 - 7.99	180	6.84	5.99 - 7.99	390	7.44	7.99	280	7.99	7.99	330	7.99
Category 3												
Processor Brand	2.99 - 4.49	190	3.91	3.49 - 4.49	350	3.73	3.69 - 4.49	110	4.16	3.99 - 4.99	370	4.94
Private Brand												
Turkey Ham												
Processor Brand	2.49 - 2.79	130	2.77	2.79 - 3.39	90	2.91	3.49 - 3.99	140	3.77	2.79 - 3.29	10	3.02
Private Brand												
Turkey Pastrami												
Processor Brand	3.69 - 4.48	50	4.11	6.99	10	6.99						
Private Brand					120	5.99						
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.49 - 8.99	490	7.24	6.99 - 9.49	200	7.32	7.99 - 8.49	30	8.32	11.99	10	11.99
Private Brand	7.99	20	7.99	7.49 - 7.99	70	7.65						
Category 2												
Processor Brand	2.99 - 6.98	120	5.27				4.99	170	4.99			
Private Brand					350	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	2,510	3.04	2.49 - 3.49	1,590	2.95	2.50 - 3.50	610	3.19	2.50 - 3.50	330	3.02
Private Brand	3.00 - 3.99	690	3.38	2.69 - 3.29	500	2.93	2.69 - 3.00	340	2.81	3.00	60	3.00
Turkey 16 oz												
Processor Brand	3.99 - 5.99	490	5.03	3.99 - 4.99	840	5.07	4.99 - 5.00	570	5.00	5.00 - 5.99	430	5.24
Private Brand							4.99	170	4.99			
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	2,190	3.01	1.99 - 2.99	1,450	2.96	2.50 - 3.50	610	3.19	2.50 - 3.50	320	3.02
Private Brand	3.00 - 3.99	690	3.38	2.69 - 3.00	490	2.92	2.69 - 3.00	340	2.81	3.00	60	3.00

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)