



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/25 thru 07/31.

Fri. Jul 25, 2014

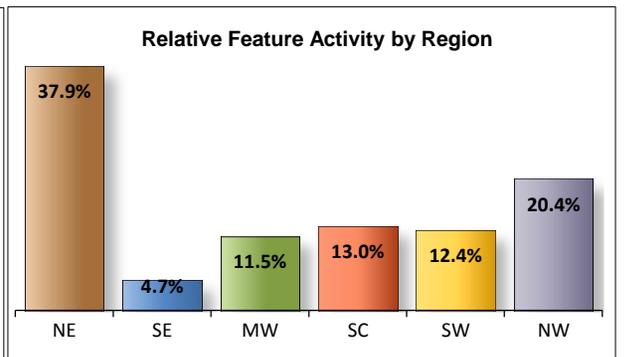
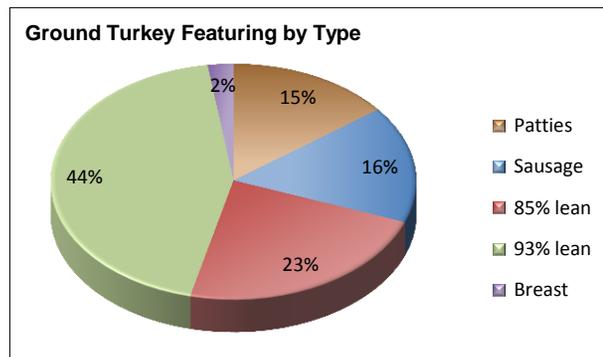
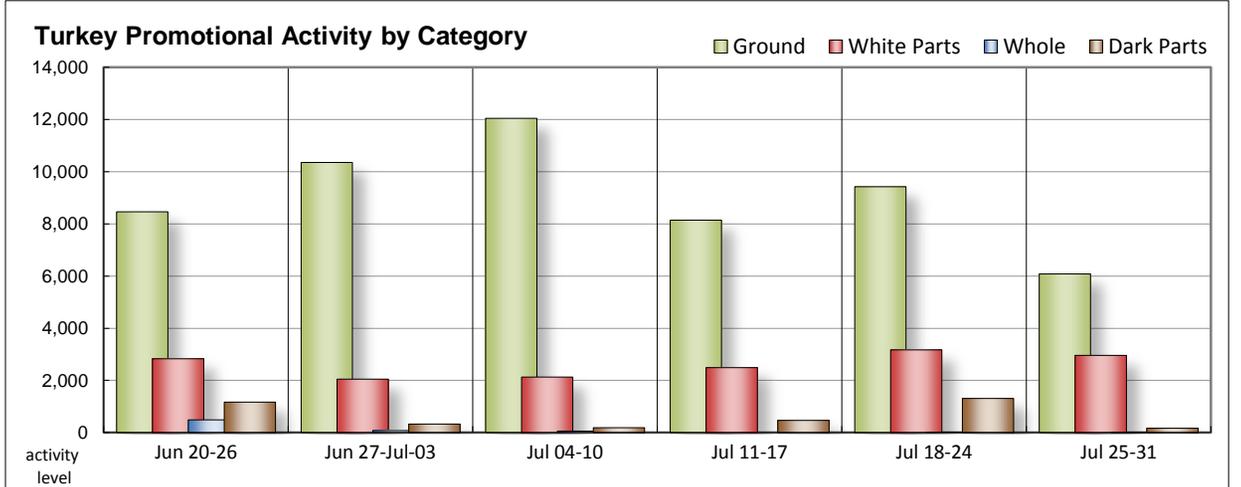
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	30.3% of 22,900 outlets		45.7% of 22,900 outlets		45.5% of 23,200 outlets	
Special Rate ^{4/}	0.5%		0.1%		6.1%	
Activity Index ^{2/}	11,870		18,240		13,670	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	10	0.99	10	1.09	30	1.12
" - Toms			10	1.09	20	1.19
PARTS:						
Breast:						
Bone-in, whole						
Fresh					10	2.49
Frozen	460	1.31	940	1.65	330	1.67
Split, bone-in						
Fresh			330	3.05	50	2.99
Rotisserie	290	6.99	470	7.79	420	7.96
Boneless, whole	360	4.89	60	5.24	100	5.14
Cutlets	560	5.29	510	5.03	580	4.89
Cutlets, thin sliced	180	4.99	10	4.99		
Strips						
Tenders	330	5.17	320	4.60	280	4.47
Marinated Tenders	780	4.54	530	3.90	730	4.22
Drumsticks	80	1.89	270	1.79	80	1.45
Thighs			20	2.34		
Wings	40	1.68	120	1.89	30	1.88
Necks	10	1.79	30	1.86	20	1.57
Smoked Drumsticks	20	1.99	290	2.56	60	1.86
Smoked Wings	20	1.99	290	2.43	80	1.89
Smoked Necks			290	2.36	30	1.89
GROUND TURKEY:	6,080	3.55	9,420	3.50	10,360	3.37
Patties	890	4.53	1,790	3.52	1,120	3.20
Sausage	980	3.61	1,610	3.72	1,360	3.30
85% lean	1,400	2.96	1,570	2.84	1,640	2.79
93% lean	2,670	3.49	3,470	3.49	4,200	3.22
Breast	140	4.70	980	4.64	2,040	4.41
Rolls (frsh/frz 1 lb.)	740	2.66	2,000	2.82	180	1.62
Specialty ^{5/}						
Patties	50	4.19	10	4.22	110	3.68
93-94% lean	610	3.62	1,060	4.34	150	3.99
Breast	1,250	6.48	1,250	6.47	20	6.24

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

This Week's Turkey Feature Highlights

Retail feature activity declines going into the end of the month. Featuring continues almost nonexistent on whole turkeys. Offerings decline on frozen bone-in breasts; prices are sharply lower this week, maybe even low enough to tempt some shoppers to buy one to place in their freezers. Offerings of rotisserie breasts decline in volume and price. More stores are featuring boneless white parts; marinated tenders are getting the most ad space in this category. Prices are lower on boneless whole breasts, steady on thin sliced cutlets, higher on the balance of items. Shoppers looking for dark parts will find very limited offerings this week. Promotional activity on ground turkey declines; the weighted average price is higher. Advertised prices are unchanged on 93% lean, mixed on other grinds. Deli feature activity slows on service and self-service deli items. Service deli prices are higher on processor brands, lower on private brands. Prices are higher on all 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/}	60.8% of 4,700 sampled outlets 0.4% of stores w/ no-price promotions Activity Index = 5,600			12.3% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 950			31.9% of 4,200 sampled outlets 2.5% of stores w/ no-price promotions Activity Index = 1,540		
	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	1.39 - 1.59	140	1.58	1.29 - 1.59	20	1.42	0.99 - 1.89	150	1.17
Split, bone-in									
Fresh									
Rotisserie	7.49 - 8.99	180	7.61						
Boneless, whole	4.39 - 4.99	310	4.95						
Cutlets	4.79 - 5.99	490	5.45				4.48	10	4.48
Cutlets, thin sliced	4.99	180	4.99						
Strips									
Tenders	5.49 - 5.99	190	5.92				3.43 - 4.49	90	4.24
Marinated Tenders	3.73 - 4.79	630	4.53	4.53 - 4.66	140	4.60	4.66	10	4.66
Drumsticks	1.49	10	1.49	1.49	10	1.49	1.49 - 1.79	20	1.67
Thighs									
Wings	1.49	10	1.49	1.89	10	1.89	1.49 - 1.79	20	1.67
Necks							1.79	10	1.79
Smoked Drumsticks	1.99	20	1.99						
Smoked Wings	1.99	20	1.99						
Smoked Necks									
GROUND TURKEY:									
Patties	3.59 - 6.99	430	5.55	3.59 - 3.68	210	3.68	3.50	120	3.50
Sausage	2.39 - 3.99	470	3.31	3.79	10	3.79	3.27 - 4.99	200	4.80
85% lean	2.29 - 3.66	580	3.14	2.50 - 3.00	120	2.92	2.49 - 2.50	120	2.49
93% lean	2.59 - 3.99	1,260	3.41	2.59 - 3.50	330	3.31	2.99 - 3.99	270	3.80
Breast (99-100% lean)	5.38	10	5.38				3.58 - 4.58	20	4.15
Rolls (frsh/frz 1 lb.)							0.99 - 3.33	490	2.66
Specialty ^{5/}									
Patties	3.99 - 4.99	50	4.19						
93-94% lean	3.49 - 5.99	540	3.62	3.49	60	3.49			
Breast	6.49	80	6.49	6.49	40	6.49	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/}	24.1% of 4,200 sampled outlets			19.0% of 2,800 sampled outlets			41.1% 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 = 1,750			Activity Index = 1,210			Activity Index = 820		
	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									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 1.68	140	1.12				1.99	10	1.99
Split, bone-in									
Fresh									
Rotisserie				5.99	110	5.99			
Boneless, whole	4.49	50	4.49						
Cutlets	3.99	50	3.99				4.49	10	4.49
Cutlets, thin sliced									
Strips									
Tenders	3.99	50	3.99						
Marinated Tenders									
Drumsticks	2.19	40	2.19						
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.29	70	3.29				3.29 - 4.49	60	3.77
Sausage	2.69 - 3.68	250	3.17	4.69	20	4.69	2.99 - 3.52	30	3.18
85% lean	2.49 - 2.99	310	2.92	2.50 - 3.19	190	2.76	2.66 - 3.19	80	3.00
93% lean	3.43 - 3.74	220	3.62	3.19 - 4.23	290	3.54	3.19 - 4.39	300	3.65
Breast (99-100% lean)	4.90	20	4.90				3.99 - 4.79	90	4.71
Rolls (frsh/frz 1 lb.)	0.99 - 3.39	210	2.37	4.79	30	4.79	2.49	10	2.49
Specialty ^{5/}									
Patties									
93-94% lean							4.49	10	4.49
Breast	6.49	340	6.49	5.49 - 6.49	560	6.48	5.49 - 6.49	220	6.45



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 07/25 thru 07/31.

(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		74.8% of 4,700 sampled outlets Activity Index = 11,520			55.5% of 5,900 sampled outlets Activity Index = 8,910		
Feature Rate ^{1/}	61.6% of 22,900 stores		76.7% of 22,900 stores		73.7% of 23,200 stores							
Activity Index ^{2/}	37,910		54,980		45,540							
	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	4,770	8.40	4,810	7.75	6,000	7.81	6.98 - 9.99	1,740	8.65	6.99 - 9.99	1,110	7.83
Private Brand	2,440	7.57	1,570	8.31	2,270	7.55	6.97 - 9.99	2,060	7.51	6.99 - 7.99	280	7.73
Category 2												
Processor Brand	3,820	5.96	3,680	5.80	4,620	5.85	4.59 - 6.99	1,990	6.10	4.99 - 6.99	130	5.81
Private Brand	2,540	6.79	3,790	7.18	3,010	6.85	4.99 - 6.99	440	6.59	6.49 - 6.99	100	6.70
Category 3												
Processor Brand	1,140	3.99	2,090	4.20	1,020	4.18	3.69 - 4.49	210	3.89	3.88 - 4.49	310	4.00
Private Brand	20	4.11	150	4.30	60	4.98	3.88 - 4.98	20	4.11			
Turkey Ham												
Processor Brand	420	4.19	630	3.45	340	3.62	2.99 - 4.99	310	4.54	2.99	40	2.99
Private Brand												
Turkey Pastrami												
Processor Brand	510	4.23	130	4.51	140	3.51	3.79 - 3.99	350	3.87	5.49	10	5.49
Private Brand			120	5.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,210	7.46	4,610	8.13	2,150	7.74	6.88 - 10.49	1,290	8.06	6.99 - 7.98	1,210	7.16
Private Brand	900	7.37	1,730	7.60	3,290	7.56	7.98 - 7.99	130	7.98	7.99	210	7.99
Category 2												
Processor Brand	180	5.33	440	5.09	70	5.37	4.99 - 5.99	130	5.45			
Private Brand	20	4.99	350	5.99	410	5.87						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	6,540	3.21	10,710	3.16	8,730	2.88	2.29 - 4.00	1,120	3.37	2.29 - 4.00	1,120	3.10
Private Brand	680	3.11	3,220	3.04	1,470	3.15	2.99 - 3.50	240	3.36	2.98 - 2.99	150	2.99
Turkey 16 oz												
Processor Brand	4,040	4.52	3,920	5.22	2,040	4.39	3.99 - 6.49	270	4.47	3.99 - 6.49	3,040	4.44
Private Brand	20	5.00	170	4.99						5.00	20	5.00
Chicken 7-10 oz												
Processor Brand	6,050	3.24	9,720	3.18	8,560	2.88	2.99 - 4.00	1,040	3.45	2.29 - 4.00	1,030	3.14
Private Brand	610	3.12	3,140	3.04	1,360	3.20	2.99 - 3.50	180	3.47	2.98 - 2.99	150	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)



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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)		
	59.5% of 4,200 sampled outlets			59.8% of 4,200 sampled outlets			54.0% of 2,800 sampled outlets			69.9% of 1,200 sampled outlets		
	Activity Index = 6,120			Activity Index = 6,180			Activity Index = 3,420			Activity Index = 1,760		
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	670	8.39	6.99 - 10.99	740	8.14	5.49 - 9.99	380	9.13	7.99 - 12.99	130	9.44
Private Brand	7.99	50	7.99	8.49	50	8.49						
Category 2												
Processor Brand	4.99 - 6.99	830	5.87	5.99 - 6.99	440	5.95	4.99 - 6.49	190	5.21	4.99 - 6.99	240	5.79
Private Brand	5.99 - 6.99	440	6.53	6.99	580	6.99	6.99	550	6.99	5.99 - 6.99	430	6.75
Category 3												
Processor Brand	3.49 - 4.99	420	4.04	3.99	170	3.99	3.99	20	3.99	3.99	10	3.99
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 3.98	30	3.66				2.99	40	2.99			
Private Brand												
Turkey Pastrami												
Processor Brand	3.88 - 3.99	30	3.93	5.49 - 5.99	100	5.59	3.69	20	3.69			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.29 - 8.99	350	6.91	5.99 - 9.49	340	6.84	8.49	10	8.49	5.99	10	5.99
Private Brand	5.99 - 10.99	250	6.30	5.99 - 7.99	250	7.45	7.99	40	7.99	7.99	20	7.99
Category 2												
Processor Brand	4.49 - 5.49	40	5.00	4.99	10	4.99						
Private Brand	4.99	20	4.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	1,170	3.04	2.19 - 2.50	1,750	2.97	2.39 - 3.99	1,050	3.59	2.50 - 3.99	330	3.63
Private Brand	2.29 - 3.99	190	2.98	3.29	10	3.29				2.49 - 2.99	90	2.94
Turkey 16 oz												
Processor Brand	3.99 - 4.99	420	4.71	4.19 - 5.49	160	4.74	3.99 - 5.00	70	4.90	5.99	80	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,020	3.10	2.49 - 2.50	1,580	2.95	2.39 - 3.99	1,050	3.59	2.50 - 3.99	330	3.63
Private Brand	2.29 - 3.99	190	2.98							2.49 - 2.99	90	2.94

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)