



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/08 thru 08/14.

Fri. Aug 08, 2014

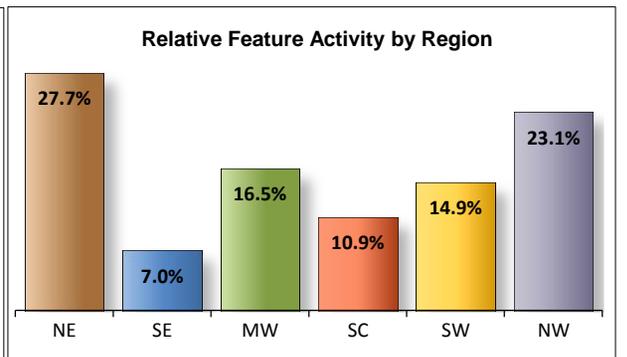
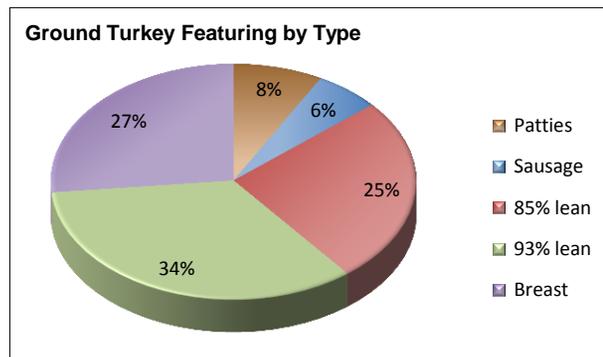
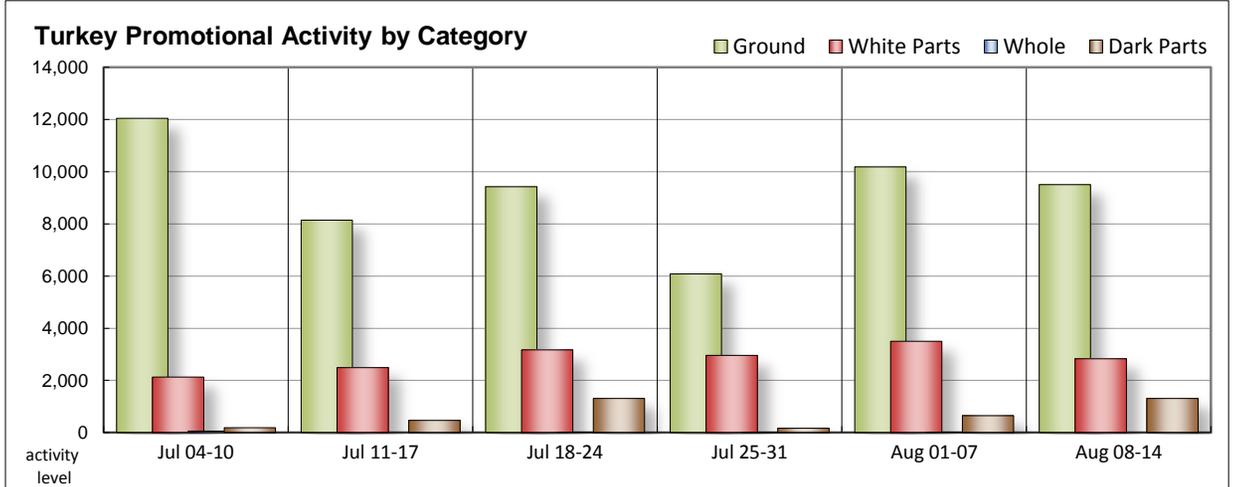
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	50.4% of 22,900 outlets		49.6% of 22,900 outlets		48.0% of 23,200 outlets	
Special Rate ^{4/}	7.9%		1.2%		0.5%	
Activity Index ^{2/}	16,630		17,200		16,740	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens			10	1.19	340	1.24
" - Toms			10	1.19	340	1.24
PARTS:						
Breast:						
Bone-in, whole						
Fresh	20	2.19				
Frozen	1,760	1.47	2,550	1.55	2,670	1.31
Split, bone-in						
Fresh					10	1.99
Rotisserie	390	7.68	110	8.63	660	8.15
Boneless, whole	20	4.97	50	4.49	260	5.22
Cutlets	470	5.12	160	4.88	110	5.48
Cutlets, thin sliced	40	4.99	220	4.99	70	4.99
Strips						
Tenders	10	4.39	90	4.80	170	5.27
Marinated Tenders	120	4.60	320	4.34	1,400	5.27
Drumsticks	310	1.91	250	1.81		
Thighs	340	2.20				
Wings	60	1.71	90	1.97	20	1.99
Necks	40	1.76	10	1.79		
Smoked Drumsticks	240	2.32	140	2.85	180	2.29
Smoked Wings	220	2.29	140	2.85	190	1.69
Smoked Necks	100	2.24	20	1.99	190	1.69
GROUND TURKEY:	9,500	3.63	10,180	3.26	8,830	3.20
Patties	760	4.18	1,260	3.35	570	3.66
Sausage	550	3.53	850	3.40	1,210	3.41
85% lean	2,430	2.76	1,890	2.56	2,920	2.76
93% lean	3,230	3.28	5,450	3.34	3,430	3.17
Breast	2,530	4.89	730	4.54	700	4.57
Rolls (frsh/frz 1 lb.)	370	2.75	610	2.57	370	2.46
Specialty ^{5/}						
Patties	20	4.99	630	4.80	130	3.86
93-94% lean	1,020	3.89	1,560	4.90	140	3.70
Breast	1,580	6.32	50	6.31	660	5.53

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

This Week's Turkey Feature Highlights

Feature activity slows; more stores than usual are showing no-price specials this week. There is little interest in promoting whole turkeys. Offerings on bone-in breasts are less active but still widely available; prices are lower. Rotisserie breasts are finding more space in this week's circulars; prices are sharply lower. Offerings increase on cutlets, decline on the other boneless white parts. Prices are mixed but mostly higher. This is the week for shoppers to pick up a few fresh or smoked dark parts; featuring is more active and prices are lower on most dark parts. Promotional activity slows on ground turkey; the weighted average price is higher. While 93% lean remains the most actively featured grind, offerings increase sharply on ground breast. Featuring also increases on specialty ground breast. There is a large drop in offerings of service deli and self-service deli items. Service deli prices are mostly lower on processor brands, mixed on private brands. The increase in private brand self-service deli feature activity can't make up for the drop in promotions on processor brand 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 12.3% of stores w/ no-price promotions Activity Index = 5,890			26.1% of 5,900 sampled outlets 5.0% of stores w/ no-price promotions Activity Index = 2,020			65.3% of 4,200 sampled outlets 9.0% of stores w/ no-price promotions Activity Index = 3,190		
	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							2.19	20	2.19
Frozen	1.49	230	1.49	1.29 - 1.59	460	1.49	1.49 - 1.89	620	1.50
Split, bone-in									
Fresh									
Rotisserie	5.99 - 7.99	220	6.75	7.99	20	7.99	8.99	20	8.99
Boneless, whole	4.97	20	4.97						
Cutlets	4.99 - 5.49	460	5.14				4.39	10	4.39
Cutlets, thin sliced	4.99	40	4.99						
Strips									
Tenders							4.39	10	4.39
Marinated Tenders	5.33	10	5.33						
Drumsticks	1.79	60	1.79				1.29 - 1.99	170	1.92
Thighs	2.49	140	2.49				1.99	120	1.99
Wings				1.59	10	1.59	1.29 - 1.99	50	1.74
Necks							1.29 - 1.99	40	1.76
Smoked Drumsticks	1.69 - 2.49	200	2.29	2.49	40	2.49			
Smoked Wings	2.29	180	2.29	2.29	40	2.29			
Smoked Necks	2.29	50	2.29	2.29	40	2.29	1.79	10	1.79
GROUND TURKEY:									
Patties	3.79 - 4.49	270	4.47	3.99	230	3.99			
Sausage	3.50 - 4.09	280	3.73	3.50	20	3.50	2.99 - 4.09	160	3.15
85% lean	2.66 - 3.33	800	2.86	2.00 - 3.50	650	2.55	2.48 - 3.20	620	2.88
93% lean	3.07 - 3.99	1,140	3.38	3.07 - 3.19	330	3.18	2.49 - 3.99	540	3.20
Breast (99-100% lean)	4.38 - 6.15	620	4.81	4.61	40	4.61	3.50 - 5.49	500	4.30
Rolls (frsh/frz 1 lb.)	3.50	10	3.50				1.99 - 3.19	260	2.94
Specialty ^{5/}									
Patties	4.99	20	4.99						
93-94% lean	3.49 - 4.99	820	3.88	3.49 - 3.99	140	3.76	3.99	10	3.99
Breast	5.49 - 6.99	320	5.63				5.99 - 6.49	30	6.14



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/08 thru 08/14.

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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/}	39.8% of 4,200 sampled outlets			49.9% of 2,800 sampled outlets			62.9% of 1,200 sampled outlets		
Special Rate ^{4/}	9.0% of stores w/ no-price promotions			4.6% of stores w/ no-price promotions			4.9% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,100			Activity Index = 2,090			Activity Index = 1,340		
	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	0.79 - 1.58	410	1.36	1.49	20	1.49	1.79	20	1.79
Split, bone-in									
Fresh									
Rotisserie				8.99	130	8.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders							4.33 - 4.66	110	4.54
Drumsticks	1.99	70	1.99				1.99	10	1.99
Thighs	1.99	70	1.99				1.99	10	1.99
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	4.39	40	4.39	3.99	150	3.99	3.99	70	3.99
Sausage				4.69	20	4.69	3.27	70	3.27
85% lean	2.39 - 3.19	120	2.70	2.66 - 3.19	220	2.79	2.39	20	2.39
93% lean	2.08 - 3.19	470	3.01	3.19 - 3.99	400	3.58	3.19 - 3.99	350	3.21
Breast (99-100% lean)	4.16 - 5.19	450	4.97	4.79 - 6.15	590	5.24	5.19	330	5.19
Rolls (frsh/frz 1 lb.)	1.99 - 2.79	100	2.19						
Specialty ^{5/}									
Patties									
93-94% lean	3.99	30	3.99	4.59	10	4.59	5.49	10	5.49
Breast	6.49	340	6.49	6.49	550	6.49	6.49 - 7.79	340	6.52



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 08/08 thru 08/14.

(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		78.4% of 4,700 sampled outlets Activity Index = 11,930			42.4% of 5,900 sampled outlets Activity Index = 7,630		
Feature Rate ^{1/}	65.2% of 22,900 stores		71.2% of 22,900 stores		71.2% of 23,200 stores							
Activity Index ^{2/}	44,400		54,260		47,720							
	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	4,730	7.64	9,200	7.96	4,870	8.23	6.48 - 12.99	1,800	7.90	6.79 - 7.99	1,130	7.17
Private Brand	2,110	7.87	3,130	7.38	2,170	8.40	6.97 - 9.99	1,250	7.81	7.99	500	7.99
Category 2												
Processor Brand	3,340	5.63	1,940	5.65	4,090	5.97	4.99 - 6.99	190	6.09	4.99 - 6.99	150	6.42
Private Brand	2,350	6.52	2,310	7.09	1,180	5.59	4.99 - 6.99	410	5.68	5.99 - 6.99	110	6.59
Category 3												
Processor Brand	1,450	3.96	1,020	4.01	1,610	4.10	2.99 - 4.99	520	4.07	2.99 - 4.38	380	3.82
Private Brand	90	5.48	150	4.98	150	5.26	5.48	90	5.48			
Turkey Ham												
Processor Brand	230	4.14	500	3.73	640	3.96	3.79 - 4.99	110	4.85	4.99	20	4.99
Private Brand					20	4.49						
Turkey Pastrami												
Processor Brand	250	4.93	30	4.82	440	3.92	3.79 - 8.99	160	5.08	4.99	20	4.99
Private Brand	10	6.49										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,840	7.72	3,340	7.87	3,600	7.41	5.99 - 9.99	2,230	7.83	5.99 - 8.99	110	7.91
Private Brand	1,580	7.43	2,250	7.51	790	7.18	6.99 - 7.99	950	7.10	7.99	500	7.99
Category 2												
Processor Brand	540	5.92	240	5.23	290	6.57	4.99 - 5.99	70	5.75			
Private Brand	200	7.08	350	6.03	200	5.99				5.99	50	5.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,770	3.34	11,740	3.23	10,750	3.00	2.00 - 4.49	1,320	3.65	2.35 - 3.99	990	3.23
Private Brand	3,440	2.74	1,930	3.22	3,060	2.99	2.44 - 2.99	500	2.86	1.99 - 3.99	1,270	2.71
Turkey 16 oz												
Processor Brand	1,670	5.40	2,600	5.51	630	5.47	4.99 - 6.49	670	5.81	6.49	210	6.49
Private Brand												
Chicken 7-10 oz												
Processor Brand	7,500	3.36	11,630	3.24	10,170	3.01	2.00 - 4.49	1,280	3.67	2.50 - 3.99	920	3.28
Private Brand	3,300	2.75	1,900	3.22	3,060	2.99	2.99	380	2.99	1.99 - 3.99	1,270	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)



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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)		
	80.8% of 4,200 sampled outlets			67.8% of 4,200 sampled outlets			56.6% of 2,800 sampled outlets			81.9% of 1,200 sampled outlets		
	Activity Index = 11,690			Activity Index = 7,250			Activity Index = 3,640			Activity Index = 2,260		
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	Price Range (\$/pound)	Summary Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.59 - 9.99	510 7.89	6.75 - 10.99	500 7.47	6.99 - 9.49	450 7.66	6.99 - 12.99	340 7.59				
Private Brand	6.99 - 10.99	110 8.12	6.49 - 8.49	250 7.77								
Category 2												
Processor Brand	4.94 - 6.99	1,950 5.56	4.99 - 7.00	850 5.45	4.69 - 6.99	180 6.12	4.98 - 5.99	20 5.23				
Private Brand	4.99 - 6.99	1,000 6.08	6.99 - 7.99	420 7.63	6.99 - 7.99	250 7.15	5.98 - 7.99	160 7.46				
Category 3												
Processor Brand	3.79 - 4.50	260 4.08	2.99 - 4.38	290 3.83								
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 3.69	20 3.34	3.49	10 3.49	2.99 - 3.17	70 3.10						
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 3.99	20 3.57	4.99	50 4.99								
Private Brand	6.49	10 6.49										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.49	510 7.63	6.75 - 8.99	510 7.64	6.99 - 7.99	240 7.12	6.99 - 7.99	240 7.52				
Private Brand	6.98 - 7.99	50 7.36	7.99	80 7.99								
Category 2												
Processor Brand	4.49 - 5.99	470 5.95										
Private Brand	4.99 - 7.99	150 7.44										
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 4.00	2,410 3.13	1.99 - 2.69	1,280 3.36	2.00 - 4.29	1,100 3.43	2.33 - 3.99	670 3.44				
Private Brand	2.49 - 3.99	720 2.80	2.50 - 2.79	830 2.67	2.79	40 2.79	2.69 - 2.79	80 2.71				
Turkey 16 oz												
Processor Brand	2.50 - 5.99	470 4.57	3.98 - 5.99	110 5.21	4.99	210 4.99						
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 4.00	2,330 3.15	1.99 - 2.99	1,240 3.37	2.00 - 4.29	1,060 3.47	2.33 - 3.99	670 3.44				
Private Brand	2.50 - 3.99	700 2.81	2.50 - 2.79	830 2.66	2.79	40 2.79	2.69 - 2.79	80 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)