



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/15 thru 08/21.

Fri. Aug 15, 2014

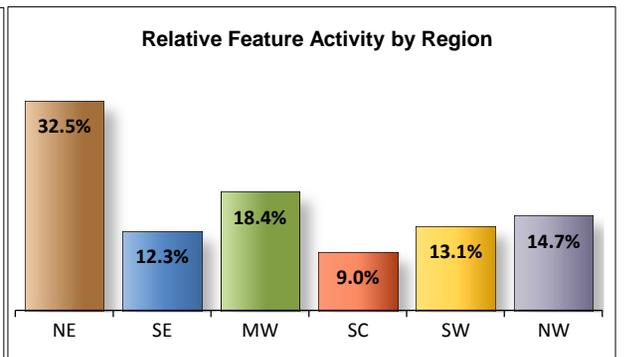
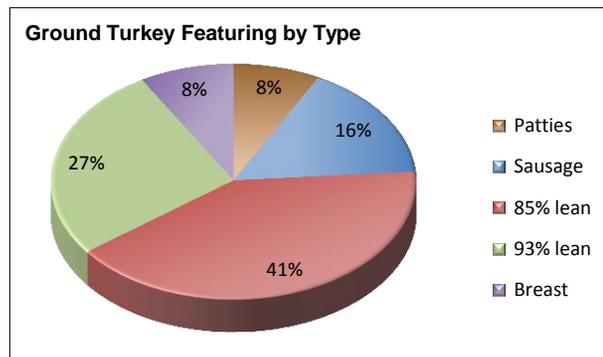
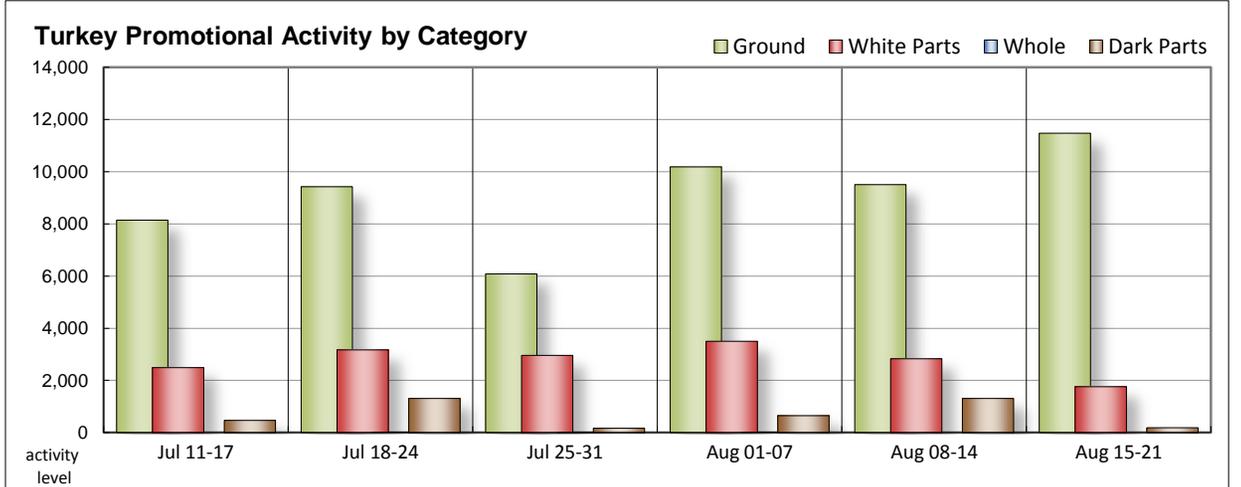
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	45.4% of 22,900 outlets		50.4% of 22,900 outlets		36.8% of 23,200 outlets	
Special Rate ^{4/}	0.3%		7.9%		0.4%	
Activity Index ^{2/}	15,630		16,630		13,200	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens						
" - Toms						
PARTS:						
Breast:						
Bone-in, whole						
Fresh			20	2.19		
Frozen	220	1.54	1,760	1.47	320	1.83
Split, bone-in						
Fresh	20	3.49			10	3.49
Rotisserie	570	7.14	390	7.68	180	7.79
Boneless, whole	30	4.99	20	4.97	40	4.74
Cutlets	410	4.81	470	5.12	490	5.20
Cutlets, thin sliced			40	4.99		
Strips						
Tenders	70	5.42	10	4.39	270	4.20
Marinated Tenders	440	4.08	120	4.60	870	4.37
Drumsticks	40	1.95	310	1.91	30	2.22
Thighs	90	1.83	340	2.20	20	2.99
Wings	40	2.00	60	1.71	50	2.17
Necks	10	1.79	40	1.76	10	1.69
Smoked Drumsticks			240	2.32	180	1.99
Smoked Wings	10	1.99	220	2.29	160	1.99
Smoked Necks			100	2.24		
GROUND TURKEY:	11,470	3.14	9,500	3.63	9,310	3.31
Patties	890	3.60	760	4.18	490	3.78
Sausage	1,840	3.40	550	3.53	1,730	3.28
85% lean	4,690	2.62	2,430	2.76	1,230	2.64
93% lean	3,080	3.25	3,230	3.28	4,680	3.19
Breast	970	4.71	2,530	4.89	1,180	4.44
Rolls (frsh/frz 1 lb.)	500	2.65	370	2.75	340	2.81
Specialty ^{5/}						
Patties			20	4.99	40	5.99
93-94% lean	1,070	4.09	1,020	3.89	820	3.58
Breast	640	6.04	1,580	6.32	60	5.80

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. Shoppers won't find any featuring on whole birds and consumers looking for ads on bone-in breasts will be disappointed to find only a few in this week's circulars. Rotisserie breasts are easier to find in the circulars; prices are lower. Cutlets and marinated tenders are the most actively promoted boneless white parts; prices are lower on both of these items. Feature activity declines on dark parts; there are only a few ads on fresh dark parts and smoked wings this week. More stores are promoting ground turkey; the weighted average price is sharply lower as prices decline on all grinds. The 85% lean is the most actively promoted grind although there are still plenty of ads for 93% lean. Deli feature activity increases; strong promotional activity on service deli more than makes up for the decline in offerings on self-service deli. Retailers increase offerings on private label service deli and processor label self-service deli.



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/}	64.7% of 4,700 sampled outlets 0.5% of stores w/ no-price promotions Activity Index = 5,850			46.4% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 3,020			49.7% of 4,200 sampled outlets 0.3% of stores w/ no-price promotions Activity Index = 3,010		
	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 - 1.49	20	1.38	1.49 - 1.99	140	1.57
Split, bone-in									
Fresh							3.49	20	3.49
Rotisserie	5.99 - 7.99	360	7.23				6.99	100	6.99
Boneless, whole	4.99	30	4.99						
Cutlets	4.98 - 5.99	160	5.03	5.99	30	5.99	4.49	180	4.49
Cutlets, thin sliced									
Strips									
Tenders				5.99	30	5.99	4.99	40	4.99
Marinated Tenders	3.73 - 4.26	420	4.08						
Drumsticks	1.99	20	1.99				1.59 - 2.49	20	1.91
Thighs							1.79 - 2.49	90	1.83
Wings	2.29	20	2.29				1.59 - 1.79	20	1.71
Necks							1.79	10	1.79
Smoked Drumsticks									
Smoked Wings							1.99	10	1.99
Smoked Necks									
GROUND TURKEY:									
Patties	3.49 - 3.99	640	3.70	3.19 - 3.50	80	3.37	2.99 - 3.89	20	3.49
Sausage	2.79 - 4.49	1,390	3.61	2.99	10	2.99	2.87 - 3.89	90	3.31
85% lean	2.39 - 2.99	770	2.60	2.39 - 3.50	2,250	2.61	2.49 - 3.29	670	2.60
93% lean	3.00 - 3.99	1,140	3.14	2.68 - 3.29	450	3.05	2.49 - 3.99	570	3.29
Breast (99-100% lean)	4.99 - 5.38	130	5.27	4.19 - 4.99	50	4.46	4.58 - 4.99	210	4.97
Rolls (frsh/frz 1 lb.)	1.88	10	1.88				1.99 - 2.99	310	2.93
Specialty ^{5/}									
Patties									
93-94% lean	3.49 - 5.49	180	3.62	3.49 - 3.99	40	3.57	3.33 - 3.99	510	3.97
Breast	5.99 - 6.99	580	6.04	5.99	60	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/}	22.3% of 4,200 sampled outlets			41.6% of 2,800 sampled outlets			38.4% of 1,200 sampled outlets		
Special Rate ^{4/}	0.6% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			1.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,480			Activity Index = 1,550			Activity Index = 720		
	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	0.96 - 1.69	60	1.52						
Split, bone-in									
Fresh									
Rotisserie				6.99	110	6.99			
Boneless, whole									
Cutlets	4.49	40	4.49						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders							3.99	20	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.00 - 3.29	100	3.14	3.99	10	3.99	3.29 - 3.99	40	3.66
Sausage	2.79	70	2.79	2.45 - 2.80	260	2.46	3.43	20	3.43
85% lean	2.55 - 2.99	380	2.79	2.39 - 3.19	550	2.63	2.39 - 2.66	70	2.64
93% lean	2.90 - 3.69	430	3.24	3.19 - 4.79	320	3.45	3.19 - 4.99	170	3.99
Breast (99-100% lean)	4.79	210	4.79	4.79	170	4.79	3.99	200	3.99
Rolls (frsh/frz 1 lb.)	1.89 - 2.99	50	2.83	1.99	130	1.99			
Specialty ^{5/}									
Patties									
93-94% lean	3.99	140	3.99				4.99	200	4.99
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 08/15 thru 08/21.

(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		90.7% of 4,700 sampled outlets			84.5% of 5,900 sampled outlets		
Feature Rate ^{1/}	81.6% of 22,900 stores		65.2% of 22,900 stores		79.9% of 23,200 stores		Activity Index = 14,610			Activity Index = 10,540		
Activity Index ^{2/}	49,920		44,400		54,090		Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg
SERVICE DELI - Turkey	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
Category 1												
Processor Brand	4,030	8.01	4,730	7.64	7,410	7.93	6.48 - 10.99	1,590	8.64	6.99 - 8.99	580	7.23
Private Brand	3,520	8.21	2,110	7.87	590	8.21	6.99 - 8.99	960	8.64	7.49 - 7.99	380	7.77
Category 2												
Processor Brand	3,980	6.23	3,340	5.63	3,910	5.87	5.49 - 6.99	1,370	6.34	5.99 - 6.99	140	6.15
Private Brand	6,630	7.50	2,350	6.52	3,570	6.63	5.99 - 8.99	2,920	7.28	6.49 - 7.99	250	7.16
Category 3												
Processor Brand	620	4.12	1,450	3.96	1,090	4.07	3.99 - 4.99	330	4.28	3.99 - 4.38	70	4.12
Private Brand	1,190	4.97	90	5.48	210	4.19	3.77 - 4.99	170	4.85	4.99	1,010	4.99
Turkey Ham												
Processor Brand	270	4.01	230	4.14	210	2.86	3.79 - 7.99	120	4.62			
Private Brand	120	2.99			40	4.48						
Turkey Pastrami												
Processor Brand	310	4.60	250	4.93	60	5.30	3.79 - 8.99	210	4.76	7.99	10	7.99
Private Brand			10	6.49								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,810	8.01	3,840	7.72	2,780	7.36	6.77 - 9.99	1,370	8.00	5.99 - 8.99	520	8.55
Private Brand	1,860	7.73	1,580	7.43	1,040	7.21	6.99 - 7.99	1,210	7.81			
Category 2												
Processor Brand	210	5.02	540	5.92	980	5.01	4.99	10	4.99			
Private Brand	1,230	5.09	200	7.08	520	6.16	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	7,890	2.86	7,770	3.34	12,410	3.05	2.49 - 3.99	1,610	3.46	1.99 - 3.50	2,330	2.85
Private Brand	2,420	2.95	3,440	2.74	1,950	3.06	2.99 - 3.29	470	3.00	2.33 - 3.00	400	2.92
Turkey 16 oz												
Processor Brand	1,480	5.15	1,670	5.40	4,080	5.44	4.69	140	4.69	4.99 - 5.99	80	5.20
Private Brand	1,290	4.17								4.00	1,070	4.00
Chicken 7-10 oz												
Processor Brand	7,640	2.85	7,500	3.36	11,290	3.05	2.49 - 3.99	1,560	3.44	1.99 - 3.50	2,290	2.85
Private Brand	2,420	2.95	3,300	2.75	1,950	3.06	2.99 - 3.29	470	3.00	2.33 - 3.00	400	2.92

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)		
	82.7% of 4,200 sampled outlets			76.4% of 4,200 sampled outlets			63.5% of 2,800 sampled outlets			88.2% of 1,200 sampled outlets		
	Activity Index = 10,320			Activity Index = 7,680			Activity Index = 4,050			Activity Index = 2,720		
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	940	7.37	6.99 - 9.99	510	8.18	6.49 - 9.49	60	8.16	6.99 - 12.99	350	7.85
Private Brand	6.99 - 10.99	910	7.96	7.49 - 8.49	770	7.83	8.49 - 8.99	290	8.92	8.49	210	8.49
Category 2												
Processor Brand	4.94 - 7.99	1,170	6.38	4.99 - 5.99	810	5.93	5.99	440	5.99	6.99	50	6.99
Private Brand	5.99 - 7.99	180	6.22	4.99 - 7.99	1,070	7.83	7.99	1,140	7.99	5.99 - 7.99	1,070	7.51
Category 3												
Processor Brand	2.98 - 4.49	160	3.82	3.99 - 4.38	20	4.19				3.99	40	3.99
Private Brand					10	4.99						
Turkey Ham												
Processor Brand	2.99 - 3.98	40	3.46	3.59	20	3.59	2.99 - 3.99	90	3.53			
Private Brand					120	2.99						
Turkey Pastrami												
Processor Brand	2.99 - 3.98	70	3.66				4.49	20	4.49			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.49	400	7.23	5.99 - 6.99	110	6.13	5.99 - 9.99	330	9.05	6.99	80	6.99
Private Brand	6.99 - 7.99	480	7.44	7.99	170	7.99						
Category 2												
Processor Brand	4.49 - 5.99	30	5.22				4.99	170	4.99			
Private Brand	5.99	120	5.99									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98 - 3.50	1,890	2.61	1.99 - 2.50	1,360	2.47	2.29 - 3.49	520	2.84	2.29 - 3.99	180	3.12
Private Brand	2.50 - 3.29	750	2.87	2.69 - 3.00	430	2.92	3.00	130	3.00	2.99 - 3.50	240	3.21
Turkey 16 oz												
Processor Brand	4.94 - 5.99	420	5.07	4.98 - 5.48	550	5.26	4.99	210	4.99	5.99	80	5.99
Private Brand	4.99	180	4.99	4.99	40	4.99						
Chicken 7-10 oz												
Processor Brand	1.98 - 3.50	1,830	2.61	1.99 - 2.69	1,260	2.45	2.29 - 3.49	520	2.84	2.29 - 3.99	180	3.12
Private Brand	2.50 - 3.29	750	2.87	2.69 - 3.00	430	2.92	3.00	130	3.00	2.99 - 3.50	240	3.21

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)

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