



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/22 thru 08/28.

Fri. Aug 22, 2014

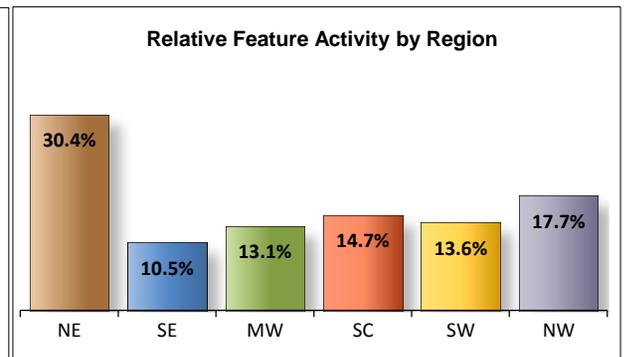
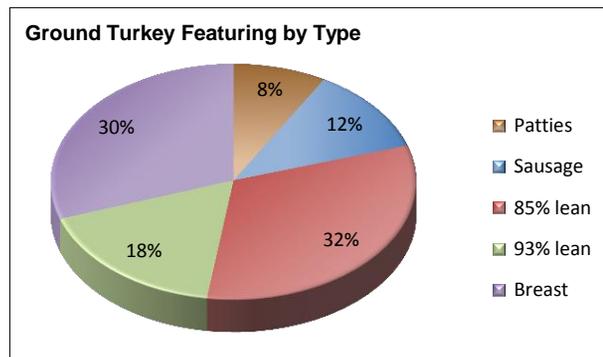
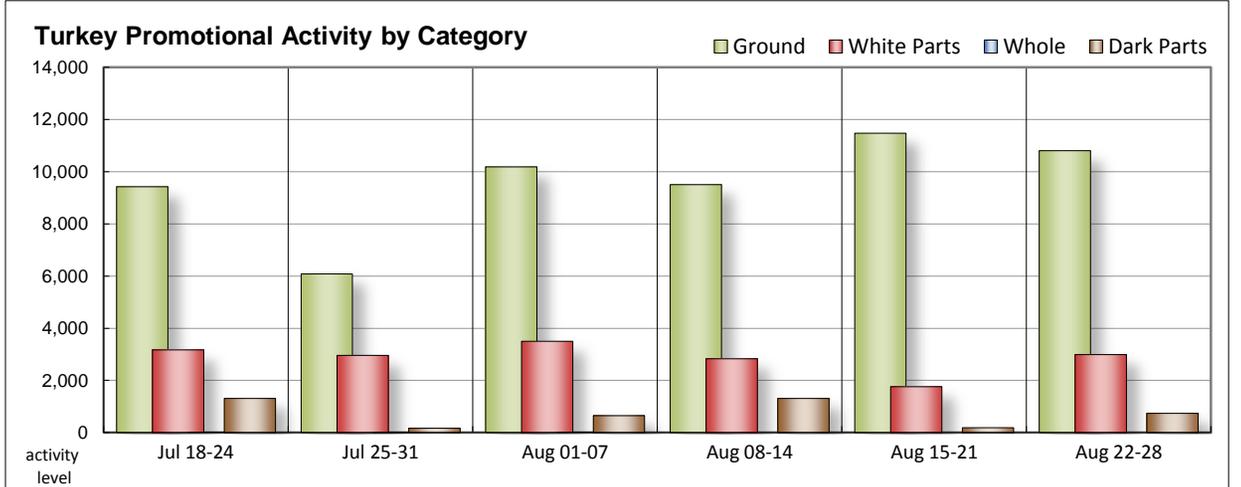
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	47.5% of 22,900 outlets		45.4% of 22,900 outlets		30.3% of 23,200 outlets	
Special Rate ^{4/}	3.2%		0.3%		2.9%	
Activity Index ^{2/}	17,310		15,630		13,730	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					260	1.40
" - Toms					200	1.47
Frozen - Hens						
" - Toms						
PARTS:						
Breast:						
Bone-in, whole					370	2.68
Fresh	270	1.56	220	1.54	80	1.62
Frozen						
Split, bone-in						
Fresh	60	3.59	20	3.49	170	2.99
Rotisserie	20	7.74	570	7.14	220	8.67
Boneless, whole	70	4.70	30	4.99		
Cutlets	530	5.04	410	4.81	210	4.56
Cutlets, thin sliced	260	4.99			130	4.99
Strips					20	3.99
Tenders	190	4.50	70	5.42	20	3.99
Marinated Tenders	1,590	5.50	440	4.08	840	4.43
Drumsticks	120	2.52	40	1.95	10	1.39
Thighs			90	1.83		
Wings	120	2.52	40	2.00	20	1.94
Necks	20	1.79	10	1.79		
Smoked Drumsticks	140	2.49			30	1.99
Smoked Wings	200	2.35	10	1.99	30	1.99
Smoked Necks	140	2.19			30	1.76
GROUND TURKEY:	10,800	3.59	11,470	3.14	9,730	3.29
Patties	900	3.81	890	3.60	1,380	3.50
Sausage	1,280	3.40	1,840	3.40	2,370	3.41
85% lean	3,470	2.67	4,690	2.62	2,540	2.80
93% lean	1,880	3.44	3,080	3.25	2,780	3.29
Breast	3,270	4.96	970	4.71	660	4.43
Rolls (frsh/frz 1 lb.)	410	2.52	500	2.65	600	2.55
Specialty ^{5/}						
Patties	50	4.96			60	4.03
93-94% lean	1,510	4.45	1,070	4.09	640	3.78
Breast	810	6.05	640	6.04	60	6.08

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

This Week's Turkey Feature Highlights

Feature activity increases on turkey items, declines on deli items. Ads for Labor Day weekend are beginning to appear; a sign that summer is almost over. There continues to be no interest in featuring fresh or frozen hens and toms. More stores are offering bone-in breasts compared to last week, but nowhere near levels seen earlier in the month. There isn't much interest in featuring rotisserie breasts. Offerings increase on boneless white parts, especially marinated tenders which are very actively promoted; prices are sharply higher on marinated tenders. Shoppers will find more ads promoting dark parts; prices are mostly higher. End of month featuring declines on ground turkey. Fewer stores promote 93% lean, instead focusing on ground breast and 85% lean. Prices are unchanged on sausage, higher on the balance. Specialty ground turkey offerings increase; prices are higher. Feature activity declines on service deli and self-service deli. Retailers increase offerings on service deli thick slicing meats, reduce offerings on thin slicing and shaving meats. Offerings increase on processor brand self-service deli; prices are 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/}	66.4% of 4,700 sampled outlets 6.6% of stores w/ no-price promotions Activity Index = 6,280			37.4% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,950			47.2% of 4,200 sampled outlets 8.2% of stores w/ no-price promotions Activity Index = 2,460		
	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	70	1.63	1.38 - 1.79	130	1.57
Split, bone-in									
Fresh	3.59	60	3.59						
Rotisserie	7.99 - 8.99	10	8.49			6.99	10	6.99	
Boneless, whole	5.69	10	5.69						
Cutlets	3.99 - 5.49	490	5.10			3.99 - 4.98	40	4.28	
Cutlets, thin sliced	4.99	180	4.99			4.99	80	4.99	
Strips									
Tenders						3.99 - 4.99	180	4.50	
Marinated Tenders	3.73 - 5.99	470	4.74	5.99	1,010	5.99			
Drumsticks	2.68	100	2.68			1.59 - 1.79	20	1.74	
Thighs									
Wings	2.68	100	2.68			1.59 - 1.79	20	1.74	
Necks						1.79	20	1.79	
Smoked Drumsticks	2.49	140	2.49						
Smoked Wings	2.29 - 2.49	200	2.35						
Smoked Necks	2.19	140	2.19						
GROUND TURKEY:									
Patties	3.49 - 3.99	480	3.79	3.49 - 3.99	110	3.85	3.49 - 3.99	210	3.94
Sausage	3.19 - 4.00	890	3.55	2.50 - 3.19	20	2.81	3.27 - 3.99	40	3.57
85% lean	1.98 - 3.66	1,570	2.78	2.50 - 3.50	800	2.71	2.49 - 3.00	690	2.59
93% lean	2.99 - 3.99	440	3.48	2.49 - 3.50	170	3.15	2.91 - 3.99	370	3.36
Breast (99-100% lean)	4.61 - 5.38	350	4.93	3.99 - 4.61	270	4.55	3.99 - 5.19	240	4.42
Rolls (frsh/frz 1 lb.)							2.69	10	2.69
Specialty ^{5/}									
Patties	3.99 - 5.99	30	5.60			3.99	20	3.99	
93-94% lean	3.99 - 5.49	460	5.20	3.99	500	3.99	3.99 - 4.99	230	4.53
Breast	5.99	160	5.99			5.99 - 6.49	150	6.37	



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/22 thru 08/28.

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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/}	46.2% of 4,200 sampled outlets			37.4% of 2,800 sampled outlets			53.0% of 1,200 sampled outlets		
Special Rate ^{4/}	1.9% 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 = 2,770			Activity Index = 1,850			Activity Index = 1,000		
	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	60	1.49	1.39	10	1.39			
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole	4.49	30	4.49				4.49 - 4.99	30	4.59
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders				4.39	10	4.39			
Marinated Tenders	4.26	100	4.26				4.39	10	4.39
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.29 - 3.99	100	3.59						
Sausage	2.50 - 3.68	330	3.03						
85% lean	1.99 - 2.73	200	2.53	1.99 - 3.19	210	2.14			
93% lean	2.49 - 3.59	460	3.41	2.80 - 4.23	250	3.66	3.19 - 3.59	190	3.51
Breast (99-100% lean)	4.16 - 5.19	540	4.85	5.19	1,110	5.19	3.99 - 5.19	760	5.05
Rolls (frsh/frz 1 lb.)	1.99 - 3.49	400	2.51						
Specialty ^{5/}									
Patties									
93-94% lean	3.69 - 4.99	320	4.04						
Breast	6.49	230	6.49	5.49	260	5.49	6.49	10	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 08/22 thru 08/28.

(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		84.4% of 4,700 sampled outlets Activity Index = 12,680			82.5% of 5,900 sampled outlets Activity Index = 12,470		
Feature Rate ^{1/}	76.3% of 22,900 stores		81.6% of 22,900 stores		82.9% of 23,200 stores							
Activity Index ^{2/}	45,530		49,920		49,050							
	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	7,370	8.46	4,030	8.01	3,720	7.83	5.99 - 12.99	2,900	8.48	6.99 - 9.99	2,110	8.63
Private Brand	4,280	7.73	3,520	8.21	2,360	7.79	6.47 - 7.99	1,990	7.65	7.49 - 7.99	500	7.70
Category 2												
Processor Brand	2,920	5.85	3,980	6.23	4,650	5.83	4.99 - 6.99	640	6.24	4.99 - 6.99	230	6.14
Private Brand	3,320	6.94	6,630	7.50	3,990	6.39	5.99 - 7.99	310	7.23	2.99 - 7.99	720	6.30
Category 3												
Processor Brand	1,060	3.98	620	4.12	750	4.41	2.99 - 3.99	260	3.95	3.98 - 4.49	150	4.28
Private Brand	130	4.69	1,190	4.97	1,460	5.00	3.97 - 5.48	90	5.01			
Turkey Ham												
Processor Brand	320	4.36	270	4.01	370	3.28	3.99 - 4.79	250	4.69			
Private Brand			120	2.99								
Turkey Pastrami												
Processor Brand	460	4.14	310	4.60	240	4.21	3.79	220	3.79	4.59 - 7.99	40	5.11
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,240	7.56	2,810	8.01	3,570	7.76	5.99 - 8.99	1,060	7.50	7.49 - 8.49	230	8.39
Private Brand	860	7.31	1,860	7.73	510	7.68	7.98	130	7.98	6.99	500	6.99
Category 2												
Processor Brand	160	5.11	210	5.02	110	4.96	5.97	20	5.97			
Private Brand	580	5.91	1,230	5.09	1,690	5.11						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,360	2.94	7,890	2.86	12,310	2.88	2.00 - 4.19	1,920	3.29	1.96 - 4.19	2,770	3.08
Private Brand	2,180	3.29	2,420	2.95	320	2.64	2.72 - 3.50	380	3.40	2.50 - 3.49	1,090	3.43
Turkey 16 oz												
Processor Brand	960	5.58	1,480	5.15	1,210	5.18	4.69 - 6.99	210	5.10	5.99 - 6.99	310	6.66
Private Brand			1,290	4.17								
Chicken 7-10 oz												
Processor Brand	8,160	2.96	7,640	2.85	11,520	2.86	2.00 - 4.19	1,920	3.29	1.99 - 4.19	2,730	3.09
Private Brand	2,170	3.30	2,420	2.95	270	2.66	2.72 - 3.50	380	3.40	2.50 - 3.49	1,090	3.43

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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	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)		
	77.7% of 4,200 sampled outlets			65.0% of 4,200 sampled outlets			61.7% of 2,800 sampled outlets			80.3% of 1,200 sampled outlets		
	Activity Index = 9,440			Activity Index = 6,230			Activity Index = 2,780			Activity Index = 1,930		
Feature Rate ^{1/}	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	
Activity Index ^{2/}												
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.69 - 10.99	890	8.30	6.99 - 8.79	790	7.99	6.99 - 9.99	460	8.81	7.99 - 11.99	220	8.16
Private Brand	6.99 - 10.99	890	7.51	6.49 - 8.49	590	7.80	7.99 - 8.99	290	8.85	7.99	20	7.99
Category 2												
Processor Brand	4.98 - 6.99	930	5.70	4.99 - 6.99	560	6.05	4.99	400	4.99	4.99 - 6.99	160	6.09
Private Brand	4.99 - 7.99	880	6.37	4.99 - 7.99	470	6.79	7.99	550	7.99	7.49 - 7.99	390	7.90
Category 3												
Processor Brand	2.99 - 4.69	290	3.93	3.50 - 4.38	40	3.87	2.99 - 3.99	240	3.87	3.99	80	3.99
Private Brand	3.88 - 3.99	30	3.94	3.99	10	3.99						
Turkey Ham												
Processor Brand	3.58	10	3.58				2.99 - 3.49	60	3.12			
Private Brand												
Turkey Pastrami												
Processor Brand	4.48 - 6.49	50	4.97	5.99	30	5.99	2.99	40	2.99	3.99	80	3.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.49 - 8.99	400	6.99	6.99 - 9.99	460	7.67	7.80 - 8.99	40	8.46	5.99 - 8.99	50	7.92
Private Brand	9.99	20	9.99	6.99 - 7.99	80	7.31				7.49	130	7.49
Category 2												
Processor Brand	4.99	40	4.99	4.99	100	4.99						
Private Brand	4.99 - 5.99	510	5.96	4.99 - 5.99	70	5.57						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 3.99	1,670	2.75	1.99 - 2.99	1,300	2.40	1.99 - 3.50	350	2.46	1.99 - 3.99	350	3.43
Private Brand	2.29 - 3.50	440	3.16	2.50 - 3.09	270	2.78						
Turkey 16 oz												
Processor Brand	4.99 - 5.49	310	5.11				3.99 - 4.99	30	4.72	4.99	100	4.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 3.99	1,640	2.75	1.99 - 2.69	1,200	2.39	1.99 - 3.50	320	2.45	1.99 - 3.99	350	3.43
Private Brand	2.50 - 3.99	440	3.19	2.50 - 3.00	260	2.77						

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)