



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/29 thru 09/04.

Fri. Aug 29, 2014

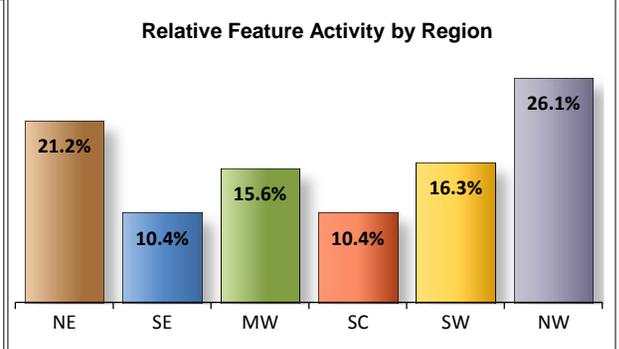
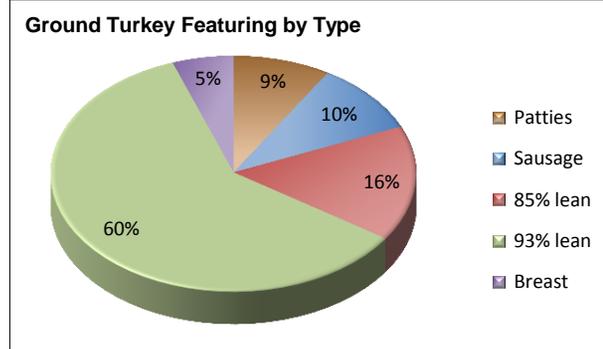
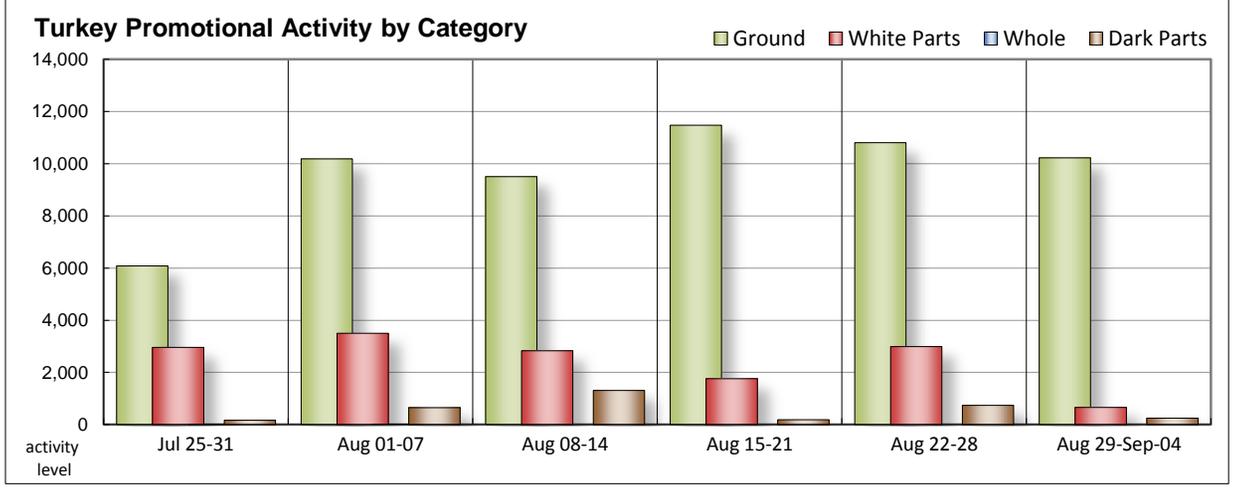
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	38.9% of 22,900 outlets		47.5% of 22,900 outlets		45.1% of 23,200 outlets	
Special Rate ^{4/}	2.0%		3.2%		3.8%	
Activity Index ^{2/}	12,410		17,310		17,120	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens					350	1.94
" - Toms					350	1.94
Frozen - Hens					50	1.37
" - Toms					50	1.37
PARTS:						
Breast:						
Bone-in, whole						
Fresh					270	3.33
Frozen	110	1.54	270	1.56	50	1.72
Split, bone-in						
Fresh			60	3.59	10	2.49
Rotisserie	70	6.99	20	7.74	90	7.36
Boneless, whole			70	4.70	200	4.99
Cutlets	140	5.02	530	5.04	20	3.99
Cutlets, thin sliced	140	5.10	260	4.99		
Strips						
Tenders	20	4.37	190	4.50		
Marinated Tenders	180	4.18	1,590	5.50	1,340	5.30
Drumsticks	100	2.17	120	2.52	330	2.00
Thighs					180	1.99
Wings	110	2.12	120	2.52	270	1.88
Necks	20	1.79	20	1.79	100	2.07
Smoked Drumsticks	10	2.49	140	2.49	20	1.79
Smoked Wings	10	2.49	200	2.35	20	1.79
Smoked Necks			140	2.19	10	1.89
GROUND TURKEY:	10,220	3.53	10,800	3.59	12,480	3.20
Patties	890	3.54	900	3.81	2,830	3.34
Sausage	1,010	3.91	1,280	3.40	3,250	3.32
85% lean	1,620	2.87	3,470	2.67	3,440	2.79
93% lean	6,140	3.57	1,880	3.44	2,640	3.28
Breast	560	4.80	3,270	4.96	320	5.04
Rolls (frsh/frz 1 lb.)	660	2.88	410	2.52	800	2.83
Specialty ^{5/}						
Patties	100	5.23	50	4.96	20	5.24
93-94% lean	520	4.92	1,510	4.45	70	3.80
Breast			810	6.05	40	6.74

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

This Week's Turkey Feature Highlights

There is little interest in featuring turkey for the Labor Day weekend; feature activity declines on turkey items, increases on deli items. Retailers are not offering whole birds; bone-in breast feature activity slows to a trickle. Shoppers will have a difficult time finding ads on rotisserie breasts, but not as hard as last week. Anyone looking for boneless white parts will find fewer ads in this week's circulars, but where featured prices are mostly lower. Offerings decline on dark parts; prices are mixed. Featuring slows but is still active on ground turkey; the weighted average price is lower. Over half the ads for ground turkey promote 93% lean at higher prices. Fewer stores are promoting specialty ground turkey, mostly 93-94% lean at higher prices. Deli feature activity increases on both service and self-service items. Service deli offerings increase on processor labels, decline on private labels; more stores are featuring service deli chicken this week. Self-service promotions are priced higher on processor labels, lower on private labels.



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/}	60.5% of 4,700 sampled outlets 8.6% of stores w/ no-price promotions Activity Index = 3,420			34.3% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,290			29.0% of 4,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 2,290		
	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	10	1.29	1.49 - 1.89	60	1.59
Split, bone-in									
Fresh									
Rotisserie							6.99	70	6.99
Boneless, whole									
Cutlets	3.99 - 6.99	120	5.10				4.49	20	4.49
Cutlets, thin sliced	4.99 - 6.99	140	5.10						
Strips									
Tenders							3.99 - 4.49	20	4.37
Marinated Tenders	5.69	20	5.69	3.99	100	3.99			
Drumsticks							1.59 - 2.29	100	2.17
Thighs									
Wings				1.59	10	1.59	1.59 - 2.29	100	2.17
Necks							1.79	20	1.79
Smoked Drumsticks	2.49	10	2.49						
Smoked Wings	2.49	10	2.49						
Smoked Necks									
GROUND TURKEY:									
Patties	3.00 - 4.48	330	4.25	3.00 - 3.59	230	3.06	2.79 - 3.50	240	3.41
Sausage	3.19 - 4.77	200	3.75	3.19 - 3.99	90	3.52	3.19 - 4.99	540	4.19
85% lean	2.66 - 3.99	730	2.98	2.39 - 3.50	380	2.98	2.29 - 3.00	310	2.69
93% lean	2.69 - 4.16	1,550	3.33	2.69 - 4.00	1,200	3.29	2.91 - 4.00	490	3.46
Breast (99-100% lean)	5.38 - 5.99	180	5.96				4.16 - 4.49	90	4.47
Rolls (frsh/frz 1 lb.)				2.99	230	2.99	2.69 - 2.99	180	2.98
Specialty ^{5/}									
Patties	4.99 - 5.99	50	5.46				3.99	10	3.99
93-94% lean	5.00	80	5.00	5.00	40	5.00	3.79 - 5.00	40	4.12
Breast									



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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/}	24.2% of 4,200 sampled outlets			40.5% of 2,800 sampled outlets			59.1% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			2.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,530			Activity Index = 1,730			Activity Index = 1,150		
	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	1.58	20	1.58	1.39	10	1.39	1.59	10	1.59
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.99	30	3.99				3.99	30	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.50	90	2.50						
Sausage	2.79 - 3.19	100	2.90				4.09	80	4.09
85% lean	2.39 - 2.50	140	2.46	2.50 - 3.00	40	2.90	2.39	20	2.39
93% lean	3.16 - 4.00	600	3.66	3.00 - 4.00	1,460	3.79	3.33 - 4.39	840	4.03
Breast (99-100% lean)	4.16 - 4.39	100	4.27	4.63	30	4.63	3.99 - 4.39	160	4.05
Rolls (frsh/frz 1 lb.)	2.99 - 3.39	80	3.20	2.49	170	2.49			
Specialty ^{5/}									
Patties	4.99	30	4.99	5.99	10	5.99			
93-94% lean	5.00	340	5.00	4.49	10	4.49	5.00	10	5.00
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 29, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/29 thru 09/04.

(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		85.4% of 4,700 sampled outlets Activity Index = 14,450			85.0% of 5,900 sampled outlets Activity Index = 10,740		
Feature Rate ^{1/}	74.6% of 22,900 stores		76.3% of 22,900 stores		75.9% of 23,200 stores							
Activity Index ^{2/}	48,890		45,530		45,570							
	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	5,950	8.37	7,370	8.46	3,460	8.08	6.99 - 9.99	2,150	8.72	6.99 - 9.99	1,570	8.39
Private Brand	2,530	8.42	4,280	7.73	900	7.30	6.99 - 9.49	1,400	8.13			
Category 2												
Processor Brand	4,400	6.11	2,920	5.85	4,700	5.95	4.99 - 6.99	1,360	6.30	4.99 - 6.99	910	6.26
Private Brand	4,300	6.83	3,320	6.94	4,130	6.83	6.99 - 7.99	2,470	7.02	6.49 - 6.99	1,190	6.54
Category 3												
Processor Brand	610	4.10	1,060	3.98	1,160	3.78	2.99 - 4.99	290	3.99	3.99 - 4.49	70	4.42
Private Brand	40	3.98	130	4.69	70	4.57	3.98	40	3.98			
Turkey Ham												
Processor Brand	340	4.08	320	4.36	290	3.25	3.99 - 4.99	210	4.17	4.59	30	4.59
Private Brand					20	3.99						
Turkey Pastrami												
Processor Brand	300	4.38	460	4.14	170	3.62	3.99 - 6.99	280	4.34			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,920	7.71	2,240	7.56	4,120	7.74	6.48 - 9.99	1,150	8.01	6.99 - 7.99	1,750	7.41
Private Brand	1,930	7.51	860	7.31	1,650	7.33	6.99 - 7.99	1,400	7.70			
Category 2												
Processor Brand	300	5.82	160	5.11	260	5.76						
Private Brand			580	5.91	50	5.25						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,110	3.33	8,360	2.94	9,250	2.97	2.79 - 4.00	840	3.25	1.96 - 4.00	2,060	3.42
Private Brand	3,080	2.75	2,180	3.29	2,500	2.60	2.50 - 3.00	1,030	2.94	2.50 - 2.79	560	2.53
Turkey 16 oz												
Processor Brand	50	5.85	960	5.58	1,870	5.00	6.99	20	6.99	5.29	10	5.29
Private Brand												
Chicken 7-10 oz												
Processor Brand	9,040	3.34	8,160	2.96	8,590	2.96	2.79 - 4.00	840	3.25	2.50 - 4.00	2,030	3.44
Private Brand	2,990	2.76	2,170	3.30	2,380	2.59	2.79 - 3.00	970	2.97	2.50 - 2.79	560	2.53

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)		
	68.7% of 4,200 sampled outlets			58.8% of 4,200 sampled outlets			64.8% of 2,800 sampled outlets			78.9% of 1,200 sampled outlets		
	Activity Index = 9,180			Activity Index = 6,310			Activity Index = 5,530			Activity Index = 2,680		
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	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5.98 - 10.99	770	7.34	6.99 - 10.99	970	8.37	6.99 - 8.99	60	8.16	6.99 - 12.99	430	8.39
Private Brand	6.99 - 10.99	910	8.87	5.99 - 8.49	90	6.77	9.49	130	9.49			
Category 2												
Processor Brand	4.98 - 6.99	960	6.21	5.99 - 6.99	460	6.00	4.99	370	4.99	5.98 - 5.99	340	5.99
Private Brand	5.99 - 6.99	430	6.51				6.99	210	6.99			
Category 3												
Processor Brand	3.49 - 4.49	140	3.86	3.99	10	3.99	4.49 - 4.79	100	4.53			
Private Brand												
Turkey Ham												
Processor Brand	3.79	10	3.79	3.59 - 3.69	30	3.62	2.99 - 3.99	60	3.81			
Private Brand												
Turkey Pastrami												
Processor Brand							4.99	20	4.99			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.98 - 9.49	530	7.20	6.99 - 9.99	220	8.31	7.80 - 8.99	270	8.91			
Private Brand	6.99	510	6.99	7.99	20	7.99						
Category 2												
Processor Brand	4.49 - 5.99	300	5.82									
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	2,000	3.05	2.49 - 2.99	1,600	3.25	2.50 - 3.99	1,860	3.46	2.99 - 3.99	750	3.77
Private Brand	2.50 - 2.69	330	2.53	1.99 - 2.50	660	2.41	2.50 - 3.49	290	3.35	2.50 - 3.00	210	2.96
Turkey 16 oz												
Processor Brand	3.99	10	3.99				5.99	10	5.99			
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	1,980	3.05	2.49 - 2.99	1,590	3.25	2.50 - 3.99	1,860	3.46	2.99 - 3.99	740	3.77
Private Brand	2.50 - 2.69	300	2.53	1.99 - 2.50	660	2.41	2.50 - 3.49	290	3.35	2.50 - 3.00	210	2.96

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)