



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/26 thru 10/02.**

Fri. Sep 26, 2014

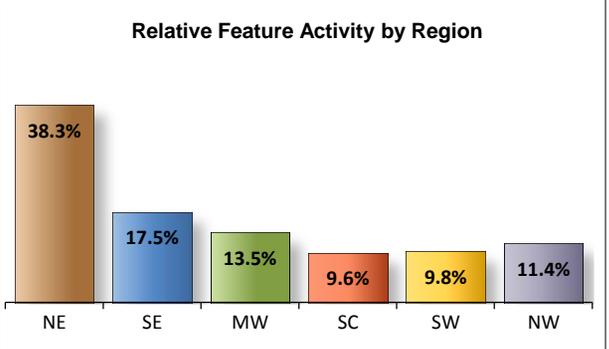
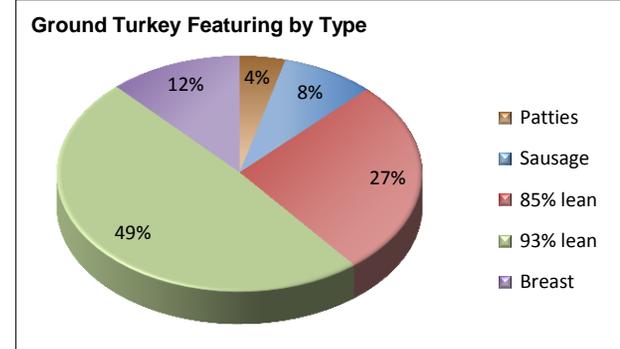
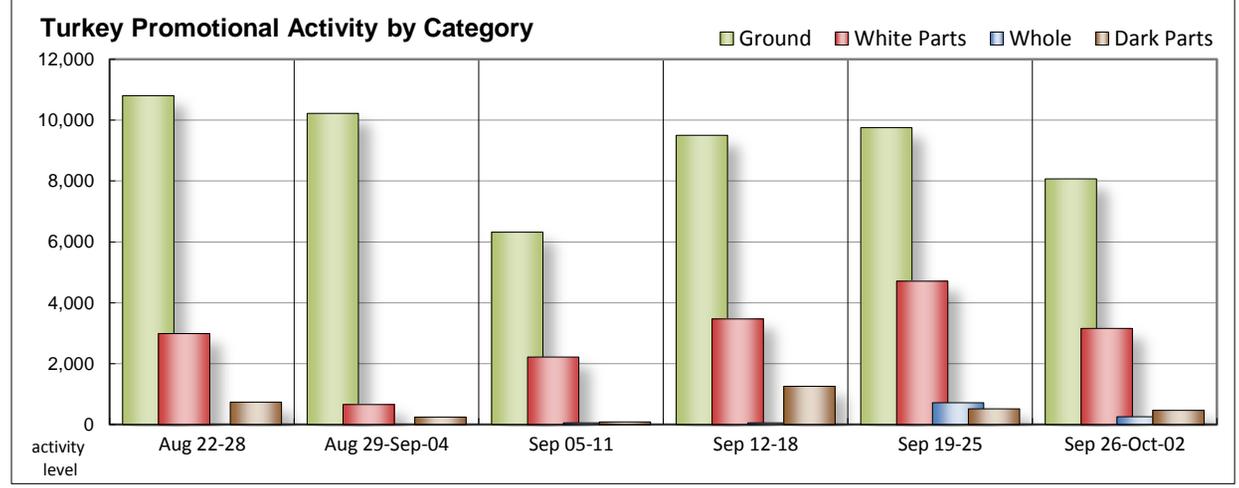
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>38.9% of 22,900 outlets</b>		<b>46.4% of 22,900 outlets</b>		<b>42.2% of 23,200 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>2.3%</b>		<b>0.6%</b>		<b>0.9%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>14,610</b>		<b>17,030</b>		<b>18,850</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens	120	1.99	180	1.99	80	1.75
" - Toms	120	1.99	180	1.99	70	1.79
Frozen - Hens	10	1.29	180	1.85	20	1.19
" - Toms	10	1.29	180	1.85	20	1.19
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole						
Fresh	230	3.51	190	3.84		
Frozen	1,970	1.90	2,330	1.89	4,110	1.92
Split, bone-in						
Fresh	70	3.32	10	2.59		
Rotisserie	470	7.25	590	7.78	670	8.21
Boneless, whole	40	4.48	10	3.99	10	4.99
Cutlets	170	4.93	860	5.05	1,300	4.56
Cutlets, thin sliced	10	6.99	260	4.99	180	4.99
Strips						
Tenders	40	4.73	220	4.88	640	4.32
Marinated Tenders	160	4.26	240	4.11	70	4.39
Drumsticks	130	1.60	230	2.06	90	1.71
Thighs	100	1.83	120	2.43	80	1.73
Wings	170	1.73	140	2.34	20	1.97
Necks			20	1.79		
Smoked Drumsticks	20	2.29	10	1.98	40	1.89
Smoked Wings	30	2.35			60	1.83
Smoked Necks	20	2.29			40	1.89
<b>GROUND TURKEY:</b>	<b>8,070</b>	<b>3.46</b>	<b>9,750</b>	<b>3.46</b>	<b>9,350</b>	<b>3.57</b>
Patties	330	4.16	590	3.75	1,380	3.58
Sausage	670	3.60	630	3.62	850	3.44
85% lean	2,170	2.92	1,850	2.84	3,540	3.04
93% lean	3,940	3.38	5,360	3.36	1,670	3.20
Breast	960	4.74	1,320	4.70	1,910	4.84
Rolls (frsh/frz 1 lb.)	660	2.67	280	2.50	610	2.88
<b>Specialty</b> <sup>5/</sup>						
Patties	160	4.24	70	4.22	50	4.29
93-94% lean	1,720	4.23	800	4.33	1,290	4.06
Breast	110	5.99	180	6.27	50	5.85

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

**This Week's Turkey Feature Highlights**

Retail feature activity slows going into the end of the month. Fewer stores promote fresh and frozen whole turkeys; there are still a few ads promoting kosher turkeys for the Jewish holidays. Offerings increase on fresh bone-in breasts, decline on frozen; however there are still plenty of ads for frozen breasts, especially in the eastern and central regions. Featuring slows on rotisserie breasts; prices are lower. Shoppers will be hard pressed to find many ads on boneless white parts; advertised prices are mixed. Feature activity declines on dark parts; prices are lower on fresh dark parts. Ground turkey ads are less prevalent in the circulars; the weighted average price is unchanged. Featuring increases on 85% lean, slows on 93% lean; prices are higher on all the grinds with the exception of sausage. Promotions on specialty 93-94% grinds will be easier to find this week. Deli feature activity declines on service and self-service deli items. Service deli ads are most active on thin slicing meats. Private label items capture a larger share of the self-service deli promotions this week.



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

	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 <sup>4/</sup> Activity Index <sup>2/</sup>	56.9% of 4,700 sampled outlets 6.3% of stores w/ no-price promotions Activity Index = 6,040			37.0% of 5,900 sampled outlets 0.2% of stores w/ no-price promotions Activity Index = 3,760			43.6% of 4,200 sampled outlets 4.9% of stores w/ no-price promotions Activity Index = 1,930		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens	1.99	120	1.99						
" - Toms	1.99	120	1.99						
Frozen - Hens							1.29	10	1.29
" - Toms							1.29	10	1.29
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh	2.99 - 3.99	230	3.51						
Frozen	1.88 - 2.99	440	2.11	1.49 - 1.99	720	1.79	1.27 - 1.99	560	1.85
Split, bone-in									
Fresh	3.29	60	3.29						
Rotisserie	5.99 - 8.99	440	7.25						
Boneless, whole	4.48	40	4.48						
Cutlets	4.99	140	4.99				4.48 - 4.69	30	4.64
Cutlets, thin sliced	6.99	10	6.99						
Strips									
Tenders							4.48 - 4.69	30	4.64
Marinated Tenders	4.26	160	4.26						
Drumsticks	1.59	120	1.59	1.69	10	1.69			
Thighs							1.79 - 1.99	100	1.83
Wings	1.59	120	1.59	1.59	10	1.59			
Necks									
Smoked Drumsticks	2.29	20	2.29						
Smoked Wings	1.78 - 2.29	20	2.18	2.69	10	2.69			
Smoked Necks	2.29	20	2.29						
<b>GROUND TURKEY:</b>									
Patties	3.49 - 4.99	180	4.82	3.50	20	3.50	2.99 - 3.49	60	3.21
Sausage	2.39 - 4.61	370	3.48	2.99 - 3.50	80	3.44	2.78 - 3.99	50	3.39
85% lean	2.66 - 3.33	940	2.85	2.39 - 3.33	550	2.60	1.99 - 2.99	120	2.46
93% lean	1.99 - 3.99	1,250	3.28	2.90 - 3.49	1,130	3.28	2.98 - 3.99	600	3.34
Breast (99-100% lean)	4.59 - 5.38	570	4.83				3.99 - 4.58	30	4.26
Rolls (frsh/frz 1 lb.)				2.99	10	2.99	2.39 - 2.99	310	2.48
<b>Specialty <sup>5/</sup></b>									
Patties	4.00 - 4.99	150	4.12						
93-94% lean	3.99 - 5.49	430	4.10	3.99 - 4.29	1,220	4.24			
Breast	5.99	90	5.99				5.99	20	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)		
<b>Feature Rate</b> <sup>1/</sup>	<b>24.7% of 4,200 sampled outlets</b>			<b>33.5% of 2,800 sampled outlets</b>			<b>23.2% of 1,200 sampled outlets</b>		
<b>Special Rate</b> <sup>4/</sup>	<b>0.4% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>		
<b>Activity Index</b> <sup>2/</sup>	<b>Activity Index = 1,370</b>			<b>Activity Index = 1,020</b>			<b>Activity Index = 490</b>		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.47 - 1.99	230	1.97	1.99	10	1.99	1.78	10	1.78
Split, bone-in									
Fresh	3.49	10	3.49						
Rotisserie	7.69	10	7.69				6.99	20	6.99
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	4.99	10	4.99						
Marinated Tenders									
Drumsticks									
Thighs									
Wings	2.19	40	2.19						
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.49	50	3.49				3.49	20	3.49
Sausage	3.19	50	3.19	2.87 - 5.49	40	4.89	4.09	80	4.09
85% lean	2.99	120	2.99	2.74 - 3.99	420	3.59	2.99	20	2.99
93% lean	2.92 - 3.50	440	3.35	2.80 - 4.00	290	3.76	3.16 - 4.39	230	4.08
Breast (99-100% lean)	4.39 - 4.99	240	4.73	4.39	80	4.39	3.99 - 4.79	40	4.58
Rolls (frsh/frz 1 lb.)	1.88 - 2.99	170	2.67	2.99	170	2.99			
<b>Specialty</b> <sup>5/</sup>									
Patties				5.99	10	5.99			
93-94% lean							4.99	70	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 09/26 thru 10/02.

(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		80.2% of 4,700 sampled outlets			48.7% of 5,900 sampled outlets		
Feature Rate <sup>1/</sup>	58.3% of 22,900 stores		73.9% of 22,900 stores		71.5% of 23,200 stores		Activity Index = 14,000			Activity Index = 8,790		
Activity Index <sup>2/</sup>	37,700		51,170		48,930		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,460	8.20	4,980	8.09	4,830	8.15	6.48 - 9.99	2,160	7.98	6.89 - 9.99	910	8.35
Private Brand	970	7.43	3,040	8.05	1,270	7.53	6.99 - 9.49	600	7.06			
<b>Category 2</b>												
Processor Brand	3,450	6.14	4,670	5.74	5,810	5.95	5.97 - 6.99	1,390	6.17	4.99 - 5.99	110	5.74
Private Brand	3,880	6.81	2,310	7.35	4,320	7.37	6.98 - 6.99	2,660	6.99	5.98	200	5.98
<b>Category 3</b>												
Processor Brand	1,180	4.16	720	3.74	890	4.21	3.69 - 4.99	520	3.97	3.99	70	3.99
Private Brand	60	4.33			1,390	4.89	3.97 - 4.48	60	4.33			
<b>Turkey Ham</b>												
Processor Brand	530	3.79	430	4.34	440	3.79	3.29 - 5.69	360	3.99			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	310	5.20	420	5.48	170	4.50	3.99 - 8.99	210	4.49			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	2,440	8.24	4,160	8.59	1,570	7.24	5.97 - 9.99	1,420	8.50	6.29 - 9.99	260	8.83
Private Brand	1,160	7.96	1,380	7.37	560	7.77	6.99 - 7.99	1,090	7.98			
<b>Category 2</b>												
Processor Brand	100	5.35	2,290	5.40	330	5.61				4.78	20	4.78
Private Brand	420	5.99	120	6.00								
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	5,300	3.45	9,130	3.44	8,570	2.70	2.49 - 4.69	1,440	3.37	2.35 - 4.19	570	3.31
Private Brand	3,010	3.22	3,040	3.11	3,740	2.85	2.79 - 3.49	320	3.09	2.79 - 3.49	2,080	3.23
<b>Turkey 16 oz</b>												
Processor Brand	2,660	6.00	2,850	5.68	2,950	3.24	4.99 - 5.99	340	5.82	4.99 - 6.99	2,020	6.04
Private Brand			210	6.49								
<b>Chicken 7-10 oz</b>												
Processor Brand	4,790	3.40	8,470	3.47	8,480	2.67	2.49 - 4.69	1,110	3.00	2.39 - 4.19	470	3.49
Private Brand	2,980	3.23	2,950	3.11	3,610	2.85	2.79 - 3.49	320	3.09	2.79 - 3.49	2,080	3.23

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)



**USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

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Feature Rate <sup>1/</sup>	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)		
	63.7% of 4,200 sampled outlets			49.1% of 4,200 sampled outlets			48.9% of 2,800 sampled outlets			53.9% of 1,200 sampled outlets		
	Activity Index = 6,690			Activity Index = 3,970			Activity Index = 2,930			Activity Index = 1,320		
Activity Index <sup>2/</sup>	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	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 10.99	440	8.25	6.99 - 11.49	360	8.56	6.99 - 8.99	150	8.53	7.99 - 12.99	440	8.48
Private Brand	7.49 - 10.99	90	8.31	5.99 - 8.49	150	7.05	8.99	130	8.99			
<b>Category 2</b>												
Processor Brand	4.98 - 6.99	710	6.32	5.29 - 5.99	740	6.07	4.99 - 5.99	390	5.87	5.99 - 6.99	110	6.31
Private Brand	4.99 - 6.99	500	6.11	5.99 - 6.99	440	6.90	6.99	80	6.99			
<b>Category 3</b>												
Processor Brand	2.99 - 4.99	520	4.51	2.99	50	2.99	3.49	10	3.49	3.98	10	3.98
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	2.99 - 3.98	40	3.37	2.79 - 3.59	40	3.15	3.49	90	3.49			
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.49 - 6.99	40	4.74				7.99	20	7.99	7.99	40	7.99
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.98 - 8.99	540	7.50	5.99 - 9.49	170	7.72	6.99 - 8.99	40	8.02	5.99	10	5.99
Private Brand	6.98 - 7.99	50	7.46	7.99	20	7.99						
<b>Category 2</b>												
Processor Brand	3.49 - 5.99	80	5.49									
Private Brand	5.99	380	5.99	5.99	40	5.99						
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.49 - 4.38	1,150	3.29	2.50 - 3.99	800	3.27	2.99 - 4.48	990	3.78	2.99 - 3.99	350	3.96
Private Brand	2.79 - 3.99	510	3.36	2.67 - 2.99	70	2.85	2.50	30	2.50			
<b>Turkey 16 oz</b>												
Processor Brand	3.99 - 5.99	30	5.18	5.39 - 6.99	250	6.11	4.99	10	4.99	4.99	10	4.99
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.49 - 4.38	1,100	3.32	3.49 - 3.99	770	3.30	2.99 - 4.48	990	3.78	2.99 - 3.99	350	3.96
Private Brand	2.79 - 3.99	510	3.36	2.67 - 2.99	70	2.85						

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)