



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/31 thru 11/06.

Fri. Oct 31, 2014

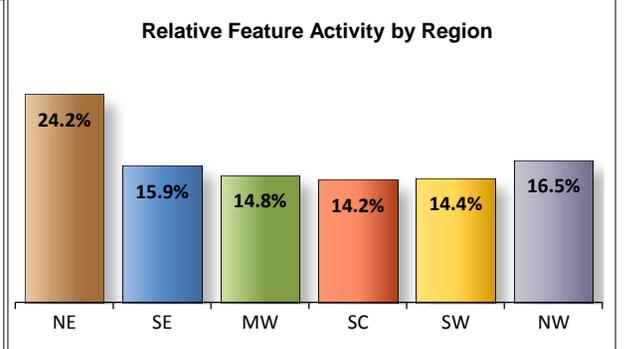
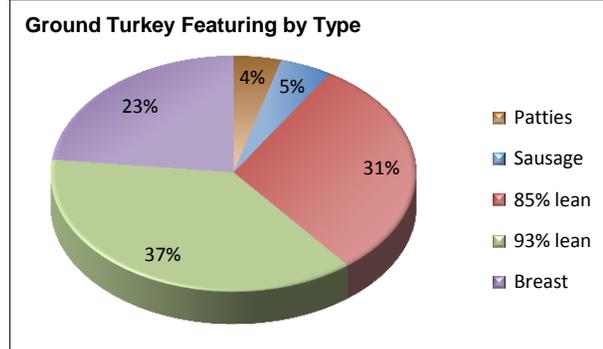
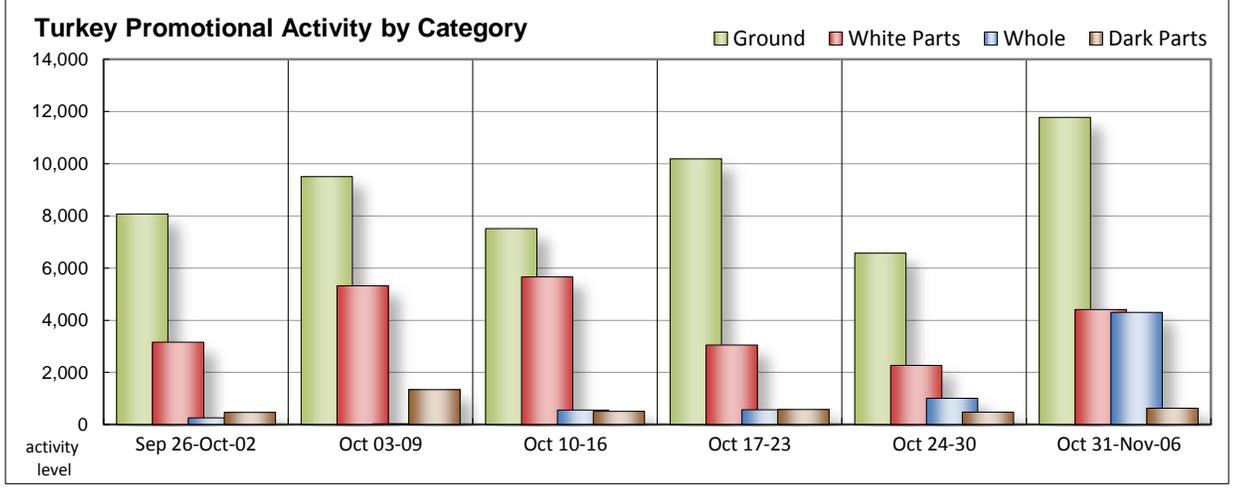
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	62.0% of 22,900 outlets		38.9% of 22,900 outlets		49.6% of 23,200 outlets	
Special Rate ^{4/}	2.0%		1.9%		0.7%	
Activity Index ^{2/}	23,760		13,350		21,530	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	2,150	0.86	510	0.86	2,980	0.90
" - Toms	2,150	0.86	500	0.86	2,980	0.90
PARTS:						
Breast:						
Bone-in, whole						
Fresh	80	2.59	10	3.29	20	1.89
Frozen	3,070	1.59	1,390	1.65	2,840	1.65
Split, bone-in						
Fresh	60	3.29			210	2.99
Rotisserie	10	8.99	160	6.68	430	7.32
Boneless, whole	50	4.88	20	4.97	400	5.04
Cutlets	510	5.51	490	5.18	710	4.24
Cutlets, thin sliced	180	4.99			140	4.99
Strips						
Tenders	30	3.99	30	5.99		
Marinated Tenders	420	4.65	170	4.51		
Drumsticks	70	1.63	180	2.37	130	1.70
Thighs	10	1.99	10	1.99		
Wings	40	1.49	140	2.40	40	1.65
Necks	10	1.39			10	1.49
Smoked Drumsticks	160	2.74	50	2.74	10	1.99
Smoked Wings	170	2.40	80	2.59	60	1.91
Smoked Necks	170	2.34	20	2.29	10	2.19
GROUND TURKEY:	11,770	3.46	6,570	3.32	8,660	3.53
Patties	500	3.75	850	3.52	650	3.40
Sausage	550	3.41	980	3.39	620	2.94
85% lean	3,580	2.75	1,260	2.77	820	2.53
93% lean	4,400	3.26	2,920	3.34	4,180	3.16
Breast	2,740	4.81	560	4.33	2,390	4.84
Rolls (frsh/frz 1 lb.)	290	3.03	1,940	2.82	250	2.67
Specialty ^{5/}						
Patties	30	5.99	30	5.66	60	4.99
93-94% lean	1,820	3.90	840	4.01	970	4.30
Breast	510	5.58	210	5.39	620	5.50

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

This Week's Turkey Feature Highlights

Retailers are finally getting into the holiday mood and feature activity climbs as more ads break on holiday items. There is a large increase in offerings on frozen hens and toms, prices are unchanged from last week. Feature activity on frozen bone-in breasts increases; prices are lower. A few more stores are featuring fresh bone-in breasts but it is still early in the season for this item. Rotisserie breasts will be hard to find in this week's circulars. Offerings on boneless white parts increase; prices are mixed. Offerings increase on dark parts, especially on smoked parts. Ground turkey is getting a lot more ad space; featuring has not been this active since last summer. Prices trend lower on 85% and 93% lean, higher on the balance of grinds. Fewer stores offer rolls. Offerings increase on specialty 93-94% ground turkey. Deli feature activity slows. Increased offerings on service deli chicken cannot make up for the drop in featuring on service deli turkey. Self-service deli promotional activity increases on processor brands, declines on private brands.



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 ^{4/} Activity Index ^{2/}	77.9% of 4,700 sampled outlets 1.4% of stores w/ no-price promotions Activity Index = 6,670			65.2% of 5,900 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 5,960			58.8% of 4,200 sampled outlets 2.7% of stores w/ no-price promotions Activity Index = 3,700		
	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	0.49 - 0.99	400	0.60	0.68 - 1.48	760	0.93	0.69 - 1.49	250	1.02
" - Toms	0.49 - 0.99	400	0.60	0.68 - 1.48	760	0.93	0.69 - 1.49	250	1.02
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.49	70	2.49				3.29	10	3.29
Frozen	1.49 - 1.99	210	1.93	1.29 - 1.99	740	1.57	0.99 - 1.99	1,140	1.46
Split, bone-in									
Fresh	3.29	60	3.29						
Rotisserie	8.99	10	8.99						
Boneless, whole	3.99 - 4.99	50	4.88						
Cutlets	4.59 - 5.99	500	5.51				5.99	10	5.99
Cutlets, thin sliced	4.99	180	4.99						
Strips									
Tenders							3.99	20	3.99
Marinated Tenders	4.53 - 4.79	130	4.57	4.53 - 4.79	270	4.73			
Drumsticks	1.59	50	1.59	1.79	10	1.79	1.69	10	1.69
Thighs							1.99	10	1.99
Wings				1.39	10	1.39	1.49 - 1.69	20	1.58
Necks									
Smoked Drumsticks	2.29 - 2.99	160	2.74						
Smoked Wings	2.29 - 2.39	160	2.38	2.69	10	2.69			
Smoked Necks	2.29 - 2.39	160	2.38				1.79	10	1.79
GROUND TURKEY:									
Patties	3.49 - 3.99	210	3.51	3.49 - 3.69	100	3.51	3.29 - 3.49	70	3.41
Sausage	2.63 - 3.50	240	3.38	3.50 - 3.59	60	3.55	2.87 - 3.99	250	3.41
85% lean	1.98 - 3.66	460	2.51	2.30 - 3.00	1,190	2.36	2.33 - 3.49	740	2.83
93% lean	2.92 - 3.84	1,610	3.22	2.98 - 3.61	1,420	3.25	2.91 - 3.99	460	3.33
Breast (99-100% lean)	4.59 - 6.15	640	5.08	4.61 - 4.99	60	4.72	4.16 - 4.99	120	4.56
Rolls (frsh/frz 1 lb.)							2.99	180	2.99
Specialty ^{5/}									
Patties	5.99	30	5.99						
93-94% lean	3.49 - 3.99	800	3.67	3.48 - 3.99	570	3.93	3.50 - 3.99	140	3.93
Breast	4.61	140	4.61				5.99	10	5.99

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Seed Market News - (515) 284-4460 <http://www.ams.usda.gov/LPSMarketNewsPage>

Data from the previous year is unavailable due to the Federal Government Furlough in 2013.



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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/}	45.6% of 4,200 sampled outlets			53.5% of 2,800 sampled outlets			71.5% of 1,200 sampled outlets		
Special Rate ^{4/}	5.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			6.4% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 3,570			Activity Index = 2,620			Activity Index = 1,240		
	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	0.69 - 1.49	610	0.86	0.99	130	0.99			
" - Toms	0.69 - 1.49	610	0.86	0.99	130	0.99			
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.69	570	1.52	1.49 - 1.59	60	1.56	1.49 - 1.99	350	1.95
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders	3.99	10	3.99				3.99	20	3.99
Marinated Tenders									
Drumsticks									
Thighs									
Wings				1.39	10	1.39			
Necks				1.39	10	1.39			
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.99	30	3.99				3.99 - 4.99	90	4.75
Sausage									
85% lean	2.99 - 3.19	680	2.97	2.79 - 3.99	470	3.52	2.79 - 3.19	40	3.04
93% lean	2.91 - 3.43	200	3.15	2.39 - 4.23	300	2.75	2.91 - 4.39	410	3.76
Breast (99-100% lean)	4.79	230	4.79	4.61 - 4.79	1,370	4.75	3.99 - 4.79	320	4.62
Rolls (frsh/frz 1 lb.)	2.79 - 3.39	110	3.10						
Specialty ^{5/}									
Patties									
93-94% lean	3.99	180	3.99	4.99	130	4.99			
Breast	5.99	340	5.99	4.59	10	4.59	5.99	10	5.99



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Oct 31, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/31 thru 11/06.

(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		79.1% of 4,700 sampled outlets			64.5% of 5,900 sampled outlets		
Feature Rate ^{1/}	68.1% of 22,900 stores		66.8% of 22,900 stores		70.5% of 23,200 stores		Activity Index = 12,820			Activity Index = 6,090		
Activity Index ^{2/}	37,590		43,080		44,450		Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
Category 1												
Processor Brand	3,980	8.16	6,150	8.49	3,970	7.98	5.99 - 12.99	1,630	8.38	6.79 - 8.99	380	7.43
Private Brand	2,100	7.70	1,140	7.57	1,490	7.37	6.98 - 9.49	1,650	7.82			
Category 2												
Processor Brand	3,030	6.09	3,770	5.73	2,960	5.77	4.99 - 6.99	1,280	6.25	4.99 - 6.99	270	6.20
Private Brand	2,790	6.65	4,280	7.36	2,120	6.47	4.99 - 6.99	590	5.11	4.99 - 6.99	660	6.74
Category 3												
Processor Brand	1,300	4.28	1,010	4.13	600	4.00	3.97 - 4.49	750	4.38	3.99 - 4.38	50	4.19
Private Brand			1,160	4.97	2,490	5.54						
Turkey Ham												
Processor Brand	510	4.05	480	3.56	210	3.47	3.69 - 5.99	300	4.30	3.99	40	3.99
Private Brand												
Turkey Pastrami												
Processor Brand	300	4.42	660	4.50	250	6.82	3.99 - 8.99	220	4.35	3.99	40	3.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,830	7.25	2,740	8.08	2,750	7.74	5.99 - 9.99	1,170	7.77	5.89 - 6.99	1,230	6.88
Private Brand	2,080	6.99	300	7.41	1,780	7.30	6.79 - 6.99	1,210	6.99	6.99	500	6.99
Category 2												
Processor Brand	250	4.15	40	5.69	30	5.75				4.99	10	4.99
Private Brand	480	5.69	1,120	5.00	1,030	5.98	4.99	140	4.99			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	7,020	3.53	6,580	3.28	6,690	2.72	2.99 - 4.39	930	3.58	2.29 - 4.49	1,330	3.54
Private Brand	1,330	3.12	2,750	3.17	7,060	3.17	2.79 - 3.99	1,050	3.17	2.79	60	2.79
Turkey 16 oz												
Processor Brand	560	5.62	1,920	5.49	350	5.23	4.49 - 6.49	20	5.76	6.49	210	6.49
Private Brand					60	4.99						
Chicken 7-10 oz												
Processor Brand	6,700	3.56	6,230	3.33	6,680	2.72	2.99 - 4.39	830	3.64	2.29 - 4.49	1,250	3.61
Private Brand	1,330	3.12	2,750	3.17	3,930	3.04	2.79 - 3.99	1,050	3.17	2.79	60	2.79

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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Fri. Oct 31, 2014

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)		
	65.3% of 4,200 sampled outlets			64.5% of 4,200 sampled outlets			59.6% of 2,800 sampled outlets			83.4% of 1,200 sampled outlets		
	Activity Index = 7,890			Activity Index = 5,710			Activity Index = 3,790			Activity Index = 1,290		
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	6.98 - 9.99	680	7.93	5.89 - 11.49	750	8.08	6.99 - 8.99	190	8.07	7.99 - 11.99	350	8.59
Private Brand	6.99 - 10.99	340	7.46	5.99 - 8.99	110	6.63						
Category 2												
Processor Brand	4.98 - 6.99	810	6.27	5.29 - 5.99	190	5.64	4.99 - 6.99	400	5.31	4.99 - 6.99	80	6.31
Private Brand	4.98 - 6.99	710	6.26	5.99 - 8.49	390	7.46	8.49 - 8.99	290	8.92	7.49 - 8.49	150	7.59
Category 3												
Processor Brand	2.99 - 3.99	270	3.97	2.99 - 4.99	180	4.16	4.79	10	4.79	4.99	40	4.99
Private Brand												
Turkey Ham												
Processor Brand	2.99	10	2.99	3.69	10	3.69	2.99 - 3.99	150	3.65			
Private Brand												
Turkey Pastrami												
Processor Brand	2.99 - 8.49	40	5.21									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.99	710	7.24	5.99 - 6.99	480	6.72	6.99	160	6.99	5.99 - 9.99	80	9.38
Private Brand	6.99 - 7.99	270	7.06	6.49 - 6.99	100	6.87						
Category 2												
Processor Brand	3.69 - 5.99	200	4.14	3.99	40	3.99						
Private Brand	5.79 - 5.99	340	5.98									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.99 - 4.69	1,510	3.21	2.50 - 3.49	1,670	3.55	2.00 - 4.59	1,290	3.81	2.48 - 4.48	290	3.66
Private Brand	2.99	180	2.99	2.99	40	2.99						
Turkey 16 oz												
Processor Brand	5.00 - 5.99	180	5.11	3.99 - 5.99	130	5.01	5.99	10	5.99	3.88	10	3.88
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.99 - 4.69	1,460	3.21	2.50 - 3.69	1,580	3.58	2.00 - 4.59	1,290	3.81	2.48 - 4.48	290	3.66
Private Brand	2.99	180	2.99	2.99	40	2.99						

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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