



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/07 thru 11/13.

Fri. Nov 07, 2014

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

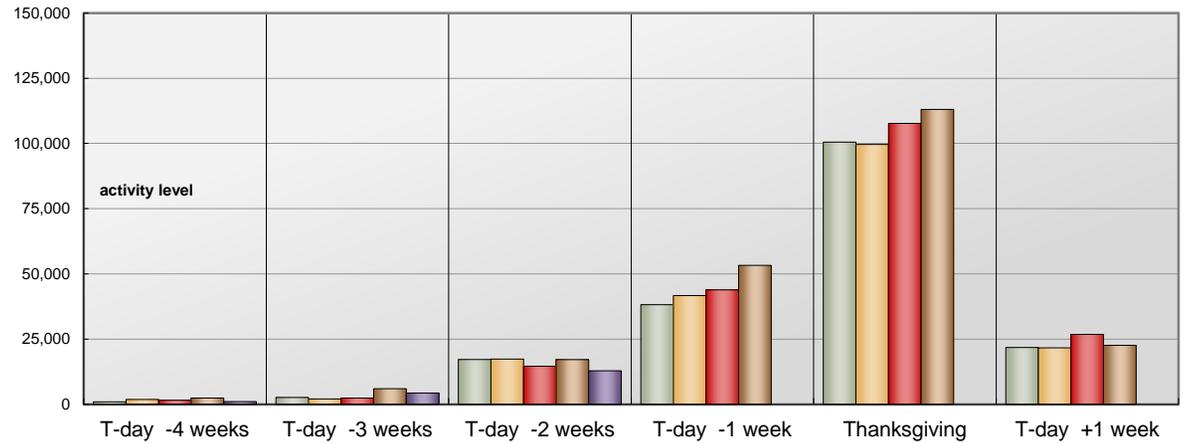
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	64.5% of 22,900 outlets		62.0% of 22,900 outlets		67.0% of 23,200 outlets	
Special Rate ^{4/}	2.5%		2.0%		3.7%	
Activity Index ^{2/}	34,460		23,760		37,940	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	30	1.76			190	1.58
" - Toms	30	1.76			190	1.58
Frozen - Hens	6,360	0.89	2,150	0.86	8,210	0.92
" - Toms	6,410	0.89	2,150	0.86	8,520	0.91
PARTS:						
Breast:						
Bone-in, whole						
Fresh			80	2.59		
Frozen	4,390	1.63	3,070	1.59	4,840	1.76
Split, bone-in						
Fresh			60	3.29	20	2.74
Rotisserie	810	8.37	10	8.99	230	6.52
Boneless, whole	10	4.99	50	4.88	70	5.58
Cutlets	380	4.97	510	5.51	780	4.70
Cutlets, thin sliced			180	4.99		
Strips						
Tenders	20	4.73	30	3.99	520	4.31
Marinated Tenders	1,970	4.50	420	4.65	1,130	4.29
Drumsticks	80	2.09	70	1.63	130	1.84
Thighs	50	2.50	10	1.99		
Wings	70	1.85	40	1.49	130	1.84
Necks	20	1.45	10	1.39	10	1.39
Smoked Drumsticks	80	2.77	160	2.74	280	2.54
Smoked Wings	160	2.55	170	2.40	210	2.25
Smoked Necks	80	2.44	170	2.34	260	2.05
GROUND TURKEY:	10,770	3.69	11,770	3.46	10,700	3.58
Patties	1,320	3.92	500	3.75	570	3.88
Sausage	1,560	3.66	550	3.41	2,060	3.29
85% lean	970	2.81	3,580	2.75	1,780	3.11
93% lean	5,600	3.52	4,400	3.26	4,100	3.27
Breast	1,320	4.74	2,740	4.81	2,190	4.75
Rolls (frsh/frz 1 lb.)	1,220	2.94	290	3.03	770	3.22
Specialty ^{5/}						
Patties	60	4.88	30	5.99	200	4.79
93-94% lean	1,450	4.65	1,820	3.90	440	4.84
Breast	10	7.49	510	5.58	110	6.33

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

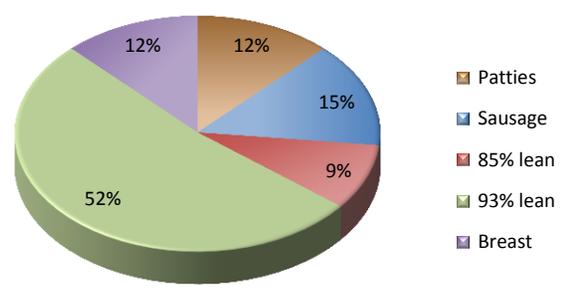
This Week's Turkey Feature Highlights

Retail feature activity increases as more grocers focus on turkeys for Thanksgiving. Offerings increase on frozen hens and toms, but they are still behind last year's level this close to the holiday. Prices are higher compared to last week, lower compared to the same week a year ago. Featuring increases on frozen bone-in breasts, but again is less active compared to the same week a year ago. Prices are higher compared to last week, lower compared to last year. Shoppers will have an easier time finding ads promoting rotisserie breasts. Offerings on boneless white parts increase due to very active featuring on marinated tenders at lower advertised prices. Offerings decline on dark parts. Feature activity slows on ground turkey, but shoppers will still find plenty of advertised items to choose from. Prices are higher on ground turkey, lower on other grinds. Deli feature activity increases on service and self-service deli items. Prices are mostly higher on service deli, higher on self-service deli.

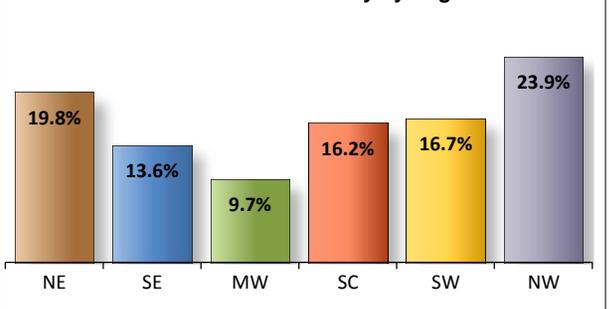
Whole Bird Activity Index during the Thanksgiving Season 2010 2011 2012 2013 2014



Ground Turkey Featuring by Type



Relative Feature Activity by Region



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/}	84.6% of 4,700 sampled outlets 7.1% of stores w/ no-price promotions Activity Index = 8,580			58.3% of 5,900 sampled outlets 0.3% of stores w/ no-price promotions Activity Index = 8,060			63.0% of 4,200 sampled outlets 1.3% of stores w/ no-price promotions Activity Index = 3,830		
	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	1.79	20	1.79				1.69	10	1.69
" - Toms	1.79	20	1.79				1.69	10	1.69
Frozen - Hens	0.49 - 1.67	710	0.81	0.68 - 1.59	1,190	0.93	0.69 - 1.29	510	0.88
" - Toms	0.49 - 1.67	710	0.81	0.68 - 1.59	1,190	0.93	0.69 - 1.29	530	0.87
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.19 - 1.99	650	1.71	1.27 - 1.99	1,340	1.57	0.99 - 1.99	1,330	1.58
Split, bone-in									
Fresh									
Rotisserie	5.99 - 8.99	360	8.35				7.99	20	7.99
Boneless, whole	4.99	10	4.99						
Cutlets	4.79 - 5.45	340	4.97	4.79	20	4.79	4.99 - 5.45	20	5.17
Cutlets, thin sliced									
Strips									
Tenders							4.79	10	4.79
Marinated Tenders	3.73 - 4.79	890	4.36	4.53 - 4.66	1,010	4.66	4.26	20	4.26
Drumsticks				1.79	10	1.79	1.39 - 2.99	60	2.08
Thighs							1.99 - 2.99	40	2.50
Wings				1.49	10	1.49	1.39 - 2.39	50	1.80
Necks							1.39 - 1.49	20	1.45
Smoked Drumsticks	2.29 - 2.99	70	2.74						
Smoked Wings	2.29 - 2.69	130	2.54	2.49	10	2.49	2.29	10	2.29
Smoked Necks	2.29 - 2.49	70	2.43	2.49	10	2.49			
GROUND TURKEY:									
Patties	3.48 - 3.99	640	3.91	3.99	500	3.99	3.33 - 3.50	20	3.43
Sausage	3.03 - 4.39	830	3.51	3.99	500	3.99	2.87 - 4.49	100	3.70
85% lean	2.68 - 3.50	120	2.87	2.39 - 3.00	120	2.82	2.16 - 3.29	390	2.66
93% lean	2.30 - 3.84	1,570	3.19	2.98 - 3.99	970	3.78	2.91 - 4.00	550	3.13
Breast (99-100% lean)	3.19 - 5.38	1,010	4.72	4.61 - 4.99	90	4.72	3.91 - 4.79	30	4.15
Rolls (frsh/frz 1 lb.)	2.99	110	2.99	2.99	1,010	2.99	1.88 - 2.89	50	2.46
Specialty ^{5/}									
Patties	3.99 - 5.99	60	4.88						
93-94% lean	3.49 - 5.00	260	4.03	3.49 - 5.00	80	4.31	3.49 - 5.00	50	3.76
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/}	61.9% of 4,200 sampled outlets			54.9% of 2,800 sampled outlets			52.5% of 1,200 sampled outlets		
Special Rate ^{4/}	4.3% 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 = 6,380			Activity Index = 4,780			Activity Index = 2,830		
	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	0.50 - 0.77	1,720	0.93	0.57 - 1.49	1,370	0.85	0.69 - 1.49	860	0.93
" - Toms	0.50 - 0.77	1,750	0.93	0.57 - 1.49	1,370	0.85	0.69 - 1.49	860	0.93
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.29 - 2.49	750	1.66	1.49 - 1.99	230	1.96	1.79 - 1.99	90	1.81
Split, bone-in									
Fresh									
Rotisserie	7.99 - 8.99	320	8.90	6.99	110	6.99			
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.99	30	3.99				4.66	10	4.66
							3.99	20	3.99
Drumsticks									
Thighs	2.48	10	2.48						
Wings	2.48	10	2.48						
Necks									
Smoked Drumsticks	2.98	10	2.98						
Smoked Wings	2.98	10	2.98						
Smoked Necks									
GROUND TURKEY:									
Patties	3.49 - 3.99	120	3.70	3.99	40	3.99			
Sausage	2.79 - 3.99	120	3.28				3.58	10	3.58
85% lean	2.83 - 2.89	130	2.86	3.00 - 3.19	140	3.04	2.99 - 3.19	70	3.00
93% lean	2.91 - 3.99	690	3.70	2.38 - 4.00	970	3.52	3.19 - 4.00	850	3.95
Breast (99-100% lean)	4.79 - 4.99	160	4.92				4.79 - 5.58	30	5.10
Rolls (frsh/frz 1 lb.)	1.88 - 2.79	50	2.34						
Specialty ^{5/}									
Patties									
93-94% lean	3.99 - 5.00	490	4.70	5.00	550	5.00	5.00 - 5.49	20	5.23
Breast									
							7.49	10	7.49



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 11/07 thru 11/13.

(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		88.2% of 4,700 sampled outlets Activity Index = 16,100			75.5% of 5,900 sampled outlets Activity Index = 10,790		
Feature Rate ^{1/}	72.8% of 22,900 stores		68.1% of 22,900 stores		75.8% of 23,200 stores							
Activity Index ^{2/}	52,600		37,590		51,080							
	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	6,060	8.34	3,980	8.16	4,620	7.67	5.99 - 10.99	2,240	7.94	6.49 - 9.99	2,110	8.84
Private Brand	4,430	8.29	2,100	7.70	3,290	7.11	6.99 - 9.99	3,130	8.13			
Category 2												
Processor Brand	3,340	6.13	3,030	6.09	4,370	5.79	4.59 - 6.99	1,250	6.27	4.98 - 6.99	180	6.01
Private Brand	6,910	7.03	2,790	6.65	3,330	7.22	4.99 - 6.99	830	5.78	5.98 - 6.99	270	6.44
Category 3												
Processor Brand	710	4.23	1,300	4.28	1,210	4.00	3.99 - 4.99	350	4.06	4.38 - 4.59	40	4.48
Private Brand	140	4.68			430	4.60	3.97 - 4.99	140	4.68			
Turkey Ham												
Processor Brand	570	4.23	510	4.05	290	3.77	3.69 - 4.99	280	4.22	4.99 - 5.99	60	5.57
Private Brand					60	3.98						
Turkey Pastrami												
Processor Brand	530	4.68	300	4.42	200	4.52	3.99 - 6.99	500	4.68	4.99	20	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	4,320	7.58	3,830	7.25	3,030	7.37	3.00 - 9.99	1,260	7.60	6.99 - 8.99	2,110	7.65
Private Brand	1,700	7.97	2,080	6.99	2,450	7.13	7.98 - 7.99	1,300	7.99			
Category 2												
Processor Brand	70	6.25	250	4.15	180	4.16	5.99	20	5.99			
Private Brand	50	5.99	480	5.69	270	5.67			5.99		50	5.99
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,470	3.32	7,020	3.53	10,430	3.03	2.99 - 4.28	1,850	3.56	2.38 - 4.00	2,420	3.22
Private Brand	610	3.20	1,330	3.12	2,340	2.55	2.99 - 3.50	390	3.29	2.49 - 2.99	50	2.85
Turkey 16 oz												
Processor Brand	2,220	5.27	560	5.62	2,110	5.18	4.99 - 5.99	650	5.75	4.99 - 5.99	1,090	5.03
Private Brand					60	3.77						
Chicken 7-10 oz												
Processor Brand	9,860	3.33	6,700	3.56	10,070	3.03	2.99 - 4.28	1,520	3.57	2.50 - 4.00	2,340	3.24
Private Brand	610	3.20	1,330	3.12	2,340	2.55	2.99 - 3.50	390	3.29	2.49 - 2.99	50	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)



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 11/07 thru 11/13.

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

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)		
	72.5% of 4,200 sampled outlets			64.1% of 4,200 sampled outlets			54.1% of 2,800 sampled outlets			73.1% of 1,200 sampled outlets		
	Activity Index = 10,460			Activity Index = 7,980			Activity Index = 4,040			Activity Index = 3,230		
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	6.99 - 10.99	270	7.96	6.99 - 11.49	840	8.42	7.99 - 8.99	270	8.14	7.99 - 8.99	330	8.18
Private Brand	7.99 - 11.99	800	8.99	7.99 - 8.99	500	8.16						
Category 2												
Processor Brand	4.99 - 6.99	910	5.93	5.29 - 6.99	310	6.36	4.99 - 6.99	190	5.83	5.99 - 6.99	500	6.15
Private Brand	4.99 - 7.99	2,480	6.48	5.99 - 8.49	1,170	7.69	6.99 - 7.99	1,310	7.83	7.49 - 7.99	850	7.91
Category 3												
Processor Brand	3.69 - 4.99	260	4.42	4.38 - 4.69	20	4.57	3.99 - 4.99	20	4.49	3.48	20	3.48
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 3.79	30	3.45	3.89 - 3.99	130	3.98	3.59 - 4.29	70	3.95			
Private Brand												
Turkey Pastrami												
Processor Brand	3.79	10	3.79									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.99	680	7.25	6.99 - 7.99	200	7.24	8.99	60	8.99	11.99	10	11.99
Private Brand	6.98 - 7.99	380	7.97	6.49	20	6.49						
Category 2												
Processor Brand	5.49 - 6.98	40	6.19	6.99	10	6.99						
Private Brand												
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.50 - 3.99	2,060	3.20	2.49 - 3.00	2,410	3.20	1.99 - 3.99	970	3.53	2.50 - 3.99	760	3.50
Private Brand	2.59 - 3.29	60	2.77				3.29	110	3.29			
Turkey 16 oz												
Processor Brand	4.99 - 5.49	480	5.15									
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.50 - 3.99	1,940	3.22	2.49 - 3.29	2,370	3.20	2.50 - 3.99	930	3.60	2.50 - 3.99	760	3.50
Private Brand	2.59 - 3.29	60	2.77				3.29	110	3.29			

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)