



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/21 thru 11/27.

Fri. Nov 21, 2014

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

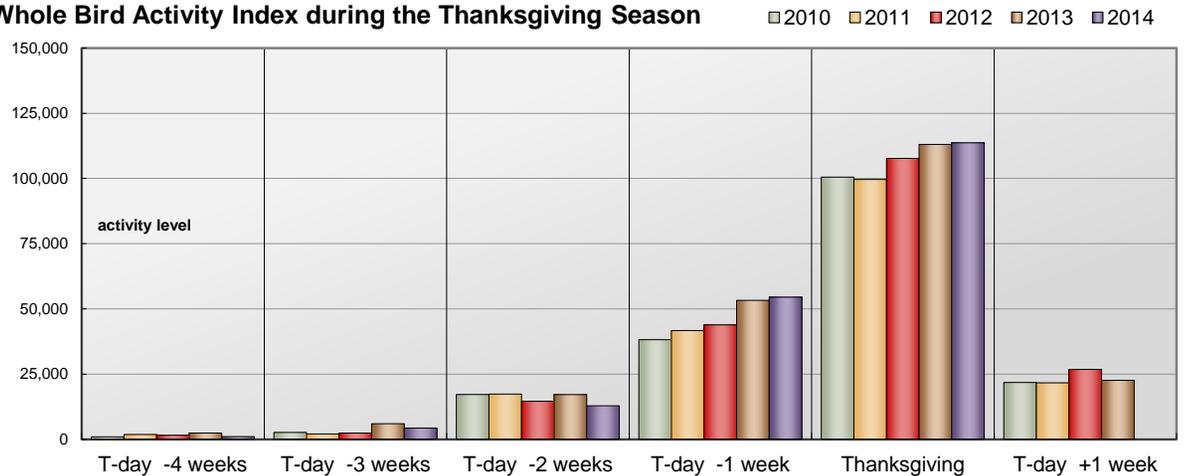
NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	86.2% of 22,900 outlets		80.0% of 22,900 outlets		94.0% of 23,200 outlets	
Special Rate ^{4/}	6.8%		3.9%		3.3%	
Activity Index ^{2/}	142,910		71,520		148,980	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	21,600	1.67	2,200	1.44	22,320	1.57
" - Toms	21,300	1.65	2,200	1.44	22,380	1.57
Frozen - Hens	35,710	0.97	24,230	0.91	33,820	0.92
" - Toms	35,020	0.97	25,830	0.93	34,510	0.91
PARTS:						
Breast:						
Bone-in, whole						
Fresh	7,610	2.66	640	3.03	6,040	2.65
Frozen	13,800	1.82	7,390	1.72	16,440	1.82
Split, bone-in						
Fresh	110	2.49				
Rotisserie	3,540	8.72	260	7.74	3,800	8.05
Boneless, whole	20	6.21			50	4.99
Cutlets	10	4.99	730	5.09	340	4.99
Cutlets, thin sliced					140	4.99
Strips			140	4.99		
Tenders			60	4.23	60	3.99
Marinated Tenders	330	4.47	270	4.75	660	4.26
Drumsticks	700	2.26	90	2.24	520	1.78
Thighs			20	2.58	10	2.49
Wings	300	2.17	50	1.63	480	1.64
Necks	190	1.80	30	1.49	120	1.88
Smoked Drumsticks	120	2.62	180	2.72	190	2.53
Smoked Wings	140	2.55	150	2.63	260	2.18
Smoked Necks	90	2.41	80	2.75	330	1.99
GROUND TURKEY:	1,980	3.44	6,790	3.55	6,460	3.85
Patties			460	3.96	540	3.40
Sausage	200	4.29	700	3.58	430	3.37
85% lean	510	2.85	2,350	2.96	710	2.81
93% lean	1,220	3.50	2,210	3.46	3,330	3.86
Breast	50	4.82	1,070	4.82	1,450	4.66
Rolls (frsh/frz 1 lb.)	40	2.94	170	2.59	30	1.76
Specialty ^{5/}						
Patties					10	3.99
93-94% lean	300	3.99				
Breast			10	5.99	10	5.99

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

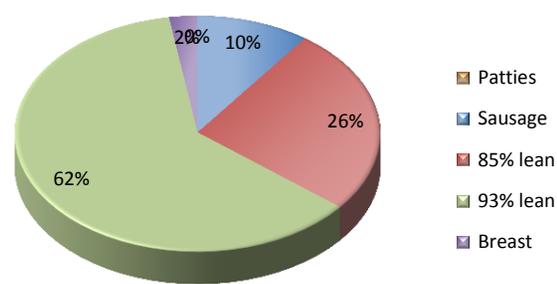
This Week's Turkey Feature Highlights

Feature activity increases as we head into the week of Thanksgiving. More stores are using special rate offers compared to a year ago. Offerings on fresh hens and toms are less active when compared to last year's Thanksgiving ads; prices are higher. Featuring increases on frozen whole turkey compared to a year ago; prices are higher. Offerings increase on fresh bone-in breasts, decline on frozen. Prices are slightly higher on fresh, unchanged on frozen. Shoppers looking for a quick and easy meal will find rotisserie breasts heavily promoted, although not as actively as a year ago; advertised prices are higher. White parts will be hard to find in this week's circulars, mostly marinated tenders at lower values. Offerings on dark parts focus on fresh drums and wings at higher price levels. Fewer stores show any interest in featuring ground turkey this week; the weighted average price is lower. The limited ground offerings center on 93% lean. Deli feature activity is sharply lower on service and self-service deli items.; prices are mixed, mostly higher.

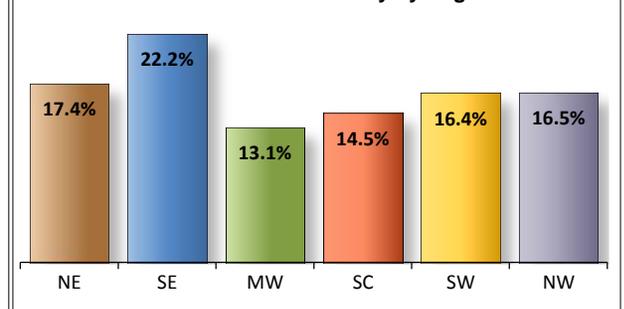
Whole Bird Activity Index during the Thanksgiving Season



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/}	89.8% of 4,700 sampled outlets 3.6% of stores w/ no-price promotions Activity Index = 28,200			88.2% of 5,900 sampled outlets 1.2% of stores w/ no-price promotions Activity Index = 49,130			75.5% of 4,200 sampled outlets 3.7% of stores w/ no-price promotions Activity Index = 19,300		
	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	0.79 - 2.49	4,320	1.55	0.99 - 2.49	7,150	1.75	0.88 - 2.69	2,390	1.74
" - Toms	0.79 - 2.49	4,030	1.48	0.99 - 2.49	7,140	1.75	0.88 - 2.69	2,390	1.74
Frozen - Hens	0.47 - 1.89	6,470	0.95	0.47 - 1.99	12,260	1.06	0.38 - 1.99	5,530	0.92
" - Toms	0.47 - 1.89	6,180	0.91	0.47 - 1.98	12,180	1.06	0.38 - 1.99	5,270	0.92
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.79 - 3.99	990	2.68	1.79 - 3.99	4,760	2.56	1.99 - 3.49	800	2.90
Frozen	1.19 - 3.49	2,410	2.06	0.99 - 3.29	5,100	1.85	0.99 - 3.29	2,030	1.61
Split, bone-in									
Fresh							2.49	110	2.49
Rotisserie	7.49 - 9.99	1,220	8.33	7.99 - 9.99	340	8.64	8.99 - 9.99	240	9.02
Boneless, whole	5.99 - 6.99	20	6.21						
Cutlets	4.99	10	4.99						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.26 - 4.66	320	4.46						
Drumsticks	1.89 - 2.99	460	2.46	1.69	40	1.69	1.59 - 1.99	60	1.81
Thighs									
Wings	1.99 - 2.69	110	2.62				1.59 - 1.99	50	1.83
Necks							1.39 - 1.99	50	1.79
Smoked Drumsticks	2.49 - 2.99	90	2.66				2.29	10	2.29
Smoked Wings	2.49 - 2.99	90	2.66	2.49	10	2.49	1.99 - 2.29	20	2.13
Smoked Necks	2.49	60	2.49	2.49	10	2.49	1.99	10	1.99
GROUND TURKEY:									
Patties									
Sausage	3.99 - 4.49	170	4.46				3.27	20	3.27
85% lean	2.66 - 3.33	260	2.89	2.49 - 3.00	120	2.78	2.99	30	2.99
93% lean	2.68 - 3.84	650	3.52				3.19 - 3.69	290	3.30
Breast (99-100% lean)	4.79 - 4.99	50	4.82						
Rolls (frsh/frz 1 lb.)				2.79	10	2.79			
Specialty ^{5/}									
Patties									
93-94% lean	3.99	290	3.99	3.99	10	3.99			
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/}	86.5% of 4,200 sampled outlets			90.5% of 2,800 sampled outlets			89.4% of 1,200 sampled outlets		
Special Rate ^{4/}	9.4% of stores w/ no-price promotions			22.9% of stores w/ no-price promotions			14.7% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 21,390			Activity Index = 17,600			Activity Index = 7,290		
	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	0.99 - 1.99	2,930	1.62	0.99 - 2.29	3,480	1.62	1.29 - 2.19	1,330	1.76
" - Toms	0.99 - 1.99	2,930	1.62	0.99 - 2.29	3,480	1.61	1.29 - 2.19	1,330	1.76
Frozen - Hens	0.29 - 1.79	5,850	0.97	0.37 - 1.89	4,010	0.79	0.59 - 2.19	1,590	0.99
" - Toms	0.37 - 1.79	5,830	0.98	0.37 - 1.89	3,970	0.79	0.59 - 2.19	1,590	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.89 - 3.29	380	2.81	2.69 - 2.99	380	2.96	2.69 - 2.99	300	2.97
Frozen	1.19 - 1.99	2,190	1.71	1.19 - 2.29	1,340	1.83	1.19 - 1.99	730	1.73
Split, bone-in									
Fresh									
Rotisserie	7.99 - 9.99	700	9.38	5.99 - 9.99	730	8.54	5.99 - 9.99	310	9.04
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
							4.66	10	4.66
Drumsticks	1.99	90	1.99	1.99	40	1.99	1.49	10	1.49
Thighs									
Wings	1.69 - 1.99	90	1.97	1.99	40	1.99	1.49	10	1.49
Necks	1.49 - 1.99	130	1.82				1.49	10	1.49
Smoked Drumsticks	2.69	10	2.69				2.49	10	2.49
Smoked Wings	2.49	10	2.49				2.49	10	2.49
Smoked Necks	2.29	10	2.29						
GROUND TURKEY:									
Patties									
Sausage				3.29	10	3.29			
85% lean	2.66 - 2.83	100	2.79						
93% lean	3.43 - 3.50	110	3.45	3.19 - 3.99	120	3.95	3.43	50	3.43
Breast (99-100% lean)									
Rolls (frsh/frz 1 lb.)	2.99	30	2.99						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 21, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/21 thru 11/27.

(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		66.3% of 4,700 sampled outlets			65.7% of 5,900 sampled outlets		
Feature Rate ^{1/}	47.2% of 22,900 stores		69.9% of 22,900 stores		75.0% of 23,200 stores		Activity Index = 12,030			Activity Index = 8,810		
Activity Index ^{2/}	30,540		43,060		43,890		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						
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,490	8.24	6,300	8.49	6,030	7.81	6.99 - 9.99	1,640	9.12	6.99 - 9.99	1,410	7.32
Private Brand	1,670	8.08	1,630	7.75	2,230	7.49	6.99 - 8.99	1,260	8.24	7.99 - 8.99	60	8.13
Category 2												
Processor Brand	3,450	6.13	5,250	5.98	3,230	5.66	4.49 - 6.99	1,610	6.36	4.99 - 6.99	490	5.88
Private Brand	3,320	7.18	3,000	6.36	5,620	5.76	4.99 - 7.99	1,970	7.73	5.98 - 6.99	620	6.66
Category 3												
Processor Brand	370	4.06	890	3.93	610	4.01	3.99	240	3.99	3.99 - 4.38	70	4.12
Private Brand	40	4.98	30	4.66	80	4.47	4.98	40	4.98			
Turkey Ham												
Processor Brand	90	5.54	570	3.58	340	3.80	3.79 - 6.99	50	5.95			
Private Brand												
Turkey Pastrami												
Processor Brand	60	4.13	290	3.94	190	4.15	3.79 - 3.99	40	3.96			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	1,370	8.15	1,810	7.75	1,920	7.51	6.97 - 9.99	800	8.13	6.99 - 9.49	360	8.34
Private Brand	950	7.97	840	7.13	1,660	7.62	6.99 - 7.99	890	7.98	7.99	10	7.99
Category 2												
Processor Brand	40	4.78	440	6.04	80	5.04	5.99	10	5.99			
Private Brand	560	5.98	530	5.71	160	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	3,630	3.57	8,200	3.46	9,490	2.97	2.50 - 4.59	640	3.74	2.50 - 4.00	1,270	3.78
Private Brand	2,310	2.98	2,010	2.94	720	2.91	2.79 - 3.39	880	3.02	2.79 - 2.99	1,070	2.98
Turkey 16 oz												
Processor Brand	1,380	5.26	1,320	5.70	1,560	5.17	5.49 - 5.99	510	5.88	3.99 - 6.49	90	5.26
Private Brand	1,070	4.50								4.50	1,070	4.50
Chicken 7-10 oz												
Processor Brand	3,430	3.58	8,020	3.49	9,310	2.95	2.50 - 4.59	570	3.71	2.50 - 4.00	1,220	3.79
Private Brand	2,310	2.98	1,930	3.05	660	2.94	2.79 - 3.39	880	3.02	2.79 - 2.99	1,070	2.98

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 ^{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)		
	45.5% of 4,200 sampled outlets			22.4% of 4,200 sampled outlets			23.7% of 2,800 sampled outlets			24.2% of 1,200 sampled outlets		
	Activity Index = 5,340			Activity Index = 2,250			Activity Index = 850			Activity Index = 1,260		
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 - 9.99	260	7.76	7.49 - 9.99	480	8.61	6.99 - 9.99	380	7.97	7.99	320	7.99
Private Brand	6.99 - 11.99	120	8.03	6.99 - 8.99	220	7.21	7.99	10	7.99			
Category 2												
Processor Brand	4.99 - 7.99	590	6.24	4.98 - 6.49	120	5.94	4.99	210	4.99	5.99	430	5.99
Private Brand	5.99 - 6.49	690	6.13	5.99	40	5.99						
Category 3												
Processor Brand	4.48 - 4.59	30	4.51	3.89 - 4.38	30	4.03						
Private Brand												
Turkey Ham												
Processor Brand	2.99	10	2.99	6.99	20	6.99	2.99 - 3.28	10	3.16			
Private Brand												
Turkey Pastrami												
Processor Brand	4.48	20	4.48									
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.99	120	7.58	7.99	10	7.99	7.80 - 7.99	30	7.94	7.99 - 11.99	50	8.68
Private Brand	6.99 - 7.99	30	7.54	8.49	20	8.49						
Category 2												
Processor Brand	3.69 - 4.99	30	4.37									
Private Brand	5.79 - 5.99	520	5.98	5.99	40	5.99						
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 3.99	900	3.26	2.50 - 3.99	630	3.38				3.49 - 3.99	190	3.71
Private Brand	2.69 - 2.99	320	2.87	2.99	40	2.99						
Turkey 16 oz												
Processor Brand	3.99 - 4.99	490	4.62				4.99	210	4.99	5.99	80	5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 3.99	890	3.27	2.50 - 3.99	560	3.46				3.49 - 3.99	190	3.71
Private Brand	2.69 - 2.99	320	2.87	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)