



**USDA National Retail Report - Turkey**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 03/20 thru 03/26.**

Fri. Mar 20, 2015

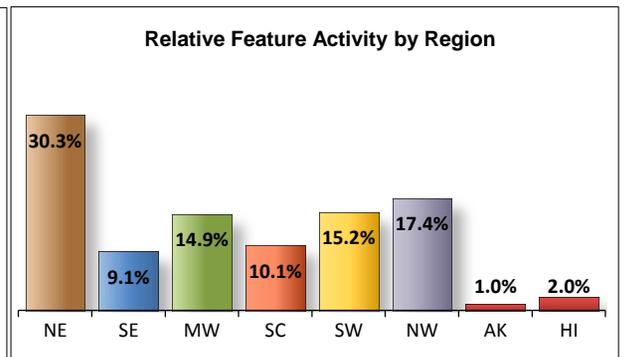
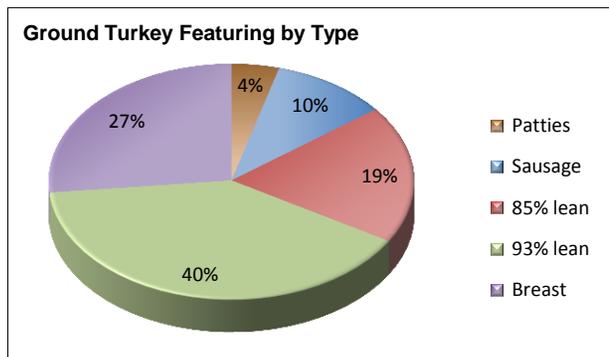
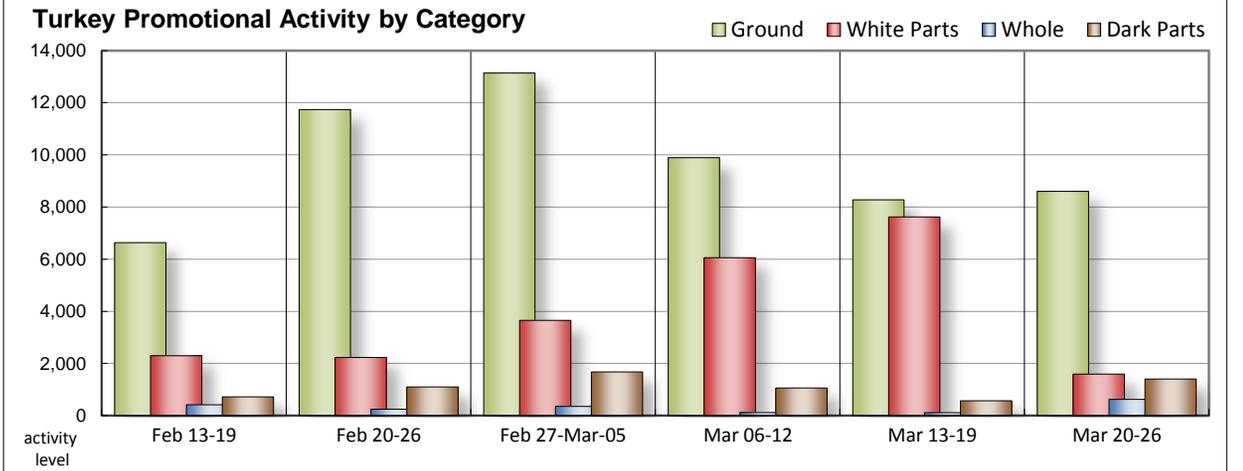
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>28.3% of 29,100 outlets</b>		<b>44.2% of 29,100 outlets</b>		<b>41.0% of 22,900 outlets</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>2.3%</b>		<b>0.7%</b>		<b>4.5%</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>15,898</b>		<b>17,388</b>		<b>16,030</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	72	1.29				
" - Toms						
Frozen - Hens	166	1.24	54	1.29	510	1.03
" - Toms	381	1.28	54	1.29	340	0.99
<b>PARTS:</b>						
<b>Breast:</b>						
<b>Bone-in, whole</b>						
Fresh	244	2.78	47	2.52	30	2.66
Frozen	511	1.73	5,066	1.60	1,770	1.59
<b>Split, bone-in</b>						
Fresh	151	2.32	137	2.10	60	2.99
Rotisserie	16	8.49	461	8.74	40	8.24
<b>Boneless, whole</b>	6	4.99	188	4.99	160	5.99
Cutlets	477	5.04	884	5.12	1,330	4.82
Cutlets, thin sliced	72	4.59	188	4.99		
Strips						
Tenders			226	4.95	670	4.76
Marinated Tenders	111	3.91	418	4.60	430	4.34
Drumsticks	300	2.16	174	1.82	450	1.81
Thighs	178	1.87	137	1.81	120	1.78
Wings	317	2.11	173	1.86	330	1.88
Necks	77	1.78	7	1.79	30	1.55
Smoked Drumsticks	172	2.11	32	2.61	220	2.61
Smoked Wings	202	2.03	26	2.66	190	2.31
Smoked Necks	154	2.05	17	2.49	220	2.08
<b>GROUND TURKEY:</b>	<b>8,596</b>	<b>3.70</b>	<b>8,272</b>	<b>3.55</b>	<b>7,590</b>	<b>3.23</b>
Patties	365	3.52	306	3.84	560	3.82
Sausage	891	3.46	681	3.33	1,180	2.86
85% lean	1,631	2.86	1,406	2.83	1,950	2.68
93% lean	3,418	3.38	4,535	3.42	3,210	3.29
Breast	2,291	4.88	1,344	4.76	690	4.73
Rolls (frsh/frz 1 lb.)	659	2.61	213	2.56	730	2.38
<b>Specialty</b> <sup>5/</sup>						
Patties	18	3.99			10	4.29
93-94% lean	1,687	4.34	545	3.85	750	3.98
Breast	1,331	6.25	69	6.99	50	5.89

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

**This Week's Turkey Feature Highlights**

Feature activity declines as other seasonal proteins compete with turkey. More stores are using no-price promotions this week. Offerings increase on whole turkeys, and kosher turkeys are actively promoted as we get closer to Easter and Passover. Shoppers looking for frozen bone-in breasts will find far fewer ads this week; fresh bone-in breasts gain more ad space. Rotisserie breasts all but disappear from this week's circulars. Fewer stores promote white parts; advertised prices are mostly lower. Featuring increases on dark parts; prices trend mostly higher on fresh, lower on smoked. Offerings increase on ground turkey. Prices trend lower on 93% lean and patties, higher on the balance. Offerings also increase on specialty grinds; prices are higher on 93-94% lean, lower on ground breast. Deli feature activity decreases due to a sharp decline on self-service deli promotions. Featuring increases on service deli items; prices are mostly higher on thick slicing meats, lower on thin slicing meats. Nearly half the ads for self-service deli focus on store 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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Fri. Mar 20, 2015

(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>	51.2% of 5,500 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 5,951			12.7% of 7,400 sampled outlets 0.2% of stores w/ no-price promotions Activity Index = 2,434			24.9% of 6,100 sampled outlets 0.5% of stores w/ no-price promotions Activity Index = 2,656		
	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	1.29	72	1.29						
" - Toms									
Frozen - Hens	0.99 - 1.69	34	1.42	1.69	2	1.69			
" - Toms	0.99 - 1.69	133	1.34	1.29 - 1.69	4	1.49	1.29	114	1.29
<b>PARTS:</b>									
<b>Breast:</b>									
Bone-in, whole									
Fresh	2.29 - 2.99	241	2.78	2.99	2	2.99	2.99	1	2.99
Frozen	1.49 - 1.99	136	1.83	0.99 - 1.99	22	1.33	1.48 - 1.99	226	1.72
Split, bone-in									
Fresh	2.99 - 3.29	45	3.10				1.99	106	1.99
Rotisserie	8.99	8	8.99						
Boneless, whole	4.99	6	4.99						
Cutlets	3.99 - 5.99	438	4.99	4.99 - 5.99	39	5.68			
Cutlets, thin sliced	4.59	72	4.59						
Strips									
Tenders									
Marinated Tenders	3.73	45	3.73						
Drumsticks	1.49 - 2.79	184	2.41				1.79	106	1.79
Thighs	1.99	72	1.99				1.79	106	1.79
Wings	1.69 - 2.79	195	2.30	1.69 - 1.99	11	1.94	1.79	106	1.79
Necks	1.79	72	1.79						
Smoked Drumsticks	1.99 - 2.49	154	2.05				1.99 - 3.68	18	2.65
Smoked Wings	1.99 - 2.49	191	2.03				1.99	11	1.99
Smoked Necks	1.99 - 2.49	154	2.05						
<b>GROUND TURKEY:</b>									
Patties	2.79 - 3.99	88	3.01	2.99 - 3.99	91	3.95	4.00	47	4.00
Sausage	2.49 - 4.39	403	3.28	3.99	21	3.99	3.19 - 3.99	403	3.56
85% lean	2.66 - 3.33	698	2.74	2.67 - 3.49	195	3.08	2.00 - 3.49	455	2.89
93% lean	2.50 - 3.84	1,484	3.50	2.68 - 3.84	697	3.19	2.68 - 3.79	430	3.19
Breast (99-100% lean)	3.84 - 5.38	417	4.75	4.16 - 4.99	75	4.63	3.74 - 5.19	256	4.77
Rolls (frsh/frz 1 lb.)	1.99	119	1.99				1.49 - 2.98	214	2.44
<b>Specialty <sup>5/</sup></b>									
Patties	3.99	18	3.99						
93-94% lean	3.29 - 6.99	388	4.41	3.50 - 4.79	1,233	4.32	2.50 - 4.49	28	3.85
Breast	5.99	84	5.99	5.99	42	5.99	6.29 - 6.49	29	6.35



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

	SOUTH CENTRAL U.S. (AR,CO,KS,LA,MO,NM,OK,TX)			SOUTHWEST U.S. (AZ,CA,NV,UT)			NORTHWEST U.S. (ID,MT,OR,WA,WY)		
<b>Feature Rate</b> <sup>1/</sup>	23.2% of 4,900 sampled outlets			29.6% of 3,800 sampled outlets			50.0% of 1,300 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	3.1% of stores w/ no-price promotions			1.7% of stores w/ no-price promotions			29.5% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 1,795			Activity Index = 1,968			Activity Index = 932		
	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	1.19	25	1.19	1.19	90	1.19	1.19	15	1.19
" - Toms	1.19	25	1.19	1.19	90	1.19	1.19	15	1.19
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.99 - 1.99	56	1.37	1.99	2	1.99	1.99	69	1.99
Split, bone-in									
Fresh									
Rotisserie	7.99	8	7.99						
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders				3.99	26	3.99	3.99 - 4.66	40	4.07
Drumsticks									
Thighs				1.69	10	1.69			
Wings				1.69	5	1.69			
Necks				1.69	5	1.69			
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.99 - 4.00	139	3.40						
Sausage	3.19	40	3.19						
85% lean	2.99 - 3.19	165	3.00	2.79 - 3.19	90	2.98	2.66 - 2.79	28	2.73
93% lean	2.73 - 3.91	375	3.45	3.19 - 3.99	258	3.36	3.19 - 3.43	139	3.22
Breast (99-100% lean)	4.16 - 5.19	498	4.92	4.79 - 5.19	636	4.94	4.79 - 5.59	327	4.81
Rolls (frsh/frz 1 lb.)	2.00 - 2.59	86	2.41	2.99 - 3.29	240	3.14			
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean	4.49	29	4.49	3.99	9	3.99			
Breast	6.49	349	6.49	5.99 - 6.99	507	6.25	5.99 - 6.49	299	6.01



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

	ALASKA (AK)			HAWAII (HI)		
<b>Feature Rate</b> <sup>1/</sup>	34.4% of 100 sampled outlets			54.0% of 100 sampled outlets		
<b>Special Rate</b> <sup>4/</sup>	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
<b>Activity Index</b> <sup>2/</sup>	Activity Index = 53			Activity Index = 109		
	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						
Split, bone-in						
Fresh						
Rotisserie						
Boneless, whole						
Cutlets						
Cutlets, thin sliced						
Strips						
Tenders						
Marinated Tenders						
Drumsticks						
Thighs						
Wings						
Necks						
Smoked Drumsticks						
Smoked Wings						
Smoked Necks						
<b>GROUND TURKEY:</b>						
Patties						
Sausage				4.69	24	4.69
85% lean						
93% lean	3.99	11	3.99	4.23	24	4.23
Breast (99-100% lean)	5.59	21	5.59	5.59 - 6.07	61	5.86
Rolls (frsh/frz 1 lb.)						
<b>Specialty</b> <sup>5/</sup>						
Patties						
93-94% lean						
Breast	6.99	21	6.99			



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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/20 thru 03/26.

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

Fri. Mar 20, 2015

	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		79.8% of 5,500 sampled outlets Activity Index = 15,431			66.1% of 7,400 sampled outlets Activity Index = 11,561		
Feature Rate <sup>1/</sup>	63.1% of 29,100 stores		71.7% of 29,100 stores		66.0% of 22,900 stores							
Activity Index <sup>2/</sup>	52,216		56,008		42,310							
	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
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,821	8.48	4,494	7.74	4,520	7.76	5.98 - 12.99	2,590	8.58	6.99 - 9.99	1,043	8.31
Private Brand	2,021	8.16	1,007	7.40	2,390	7.42	6.99 - 9.99	1,777	8.13	7.99	35	7.99
<b>Category 2</b>												
Processor Brand	3,952	6.11	4,071	6.18	2,680	5.80	4.99 - 7.99	1,605	6.25	4.69 - 7.99	176	5.95
Private Brand	3,703	6.60	5,184	7.26	2,110	6.68	4.99 - 6.99	624	5.67	4.99 - 6.99	1,069	6.35
<b>Category 3</b>												
Processor Brand	463	4.51	949	3.82	2,310	3.95	3.99 - 4.99	27	4.77	2.97 - 4.99	82	4.15
Private Brand	504	4.16			40	3.33	3.99 - 5.48	265	4.32	3.99	4	3.99
<b>Turkey Ham</b>												
Processor Brand	395	3.75	469	4.35	330	3.35	3.99 - 5.98	174	4.17	4.99	2	4.99
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	490	4.16	167	5.12	360	4.95	3.49 - 4.99	308	3.87			
Private Brand			8	2.99	10	2.99						
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	4,622	7.58	2,943	7.63	3,200	7.93	5.99 - 9.99	1,358	7.98	5.99 - 8.99	2,148	7.31
Private Brand	3,378	7.99	2,555	7.54	1,470	7.20	5.97 - 7.99	404	7.57	7.99	126	7.99
<b>Category 2</b>												
Processor Brand	238	5.31	140	5.40	40	5.49	4.99	72	4.99			
Private Brand	147	6.00	292	5.93	440	5.89	5.99	22	5.99			
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	7,080	3.44	13,606	3.51	9,020	3.05	2.50 - 4.49	1,978	3.61	2.69 - 4.29	611	3.49
Private Brand	6,387	3.15	2,387	3.20	1,280	2.61	2.99 - 3.50	1,047	3.14	2.50 - 3.67	2,711	3.40
<b>Turkey 16 oz</b>												
Processor Brand	643	5.45	2,347	5.51	2,140	5.09	3.69 - 5.99	181	4.74	5.99	232	5.99
Private Brand	95	6.99										
<b>Chicken 7-10 oz</b>												
Processor Brand	6,889	3.45	13,074	3.53	8,700	3.07	2.50 - 4.49	1,952	3.62	2.69 - 4.29	611	3.49
Private Brand	6,388	3.15	2,315	3.20	1,270	2.60	2.99 - 3.50	1,047	3.14	2.50 - 3.67	2,711	3.40

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 National Retail Report - Turkey**

Fri. Mar 20, 2015

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 03/20 thru 03/26.

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

	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)		
	54.6% of 6,100 sampled outlets			53.1% of 4,900 sampled outlets			59.8% of 3,800 sampled outlets			68.7% of 1,300 sampled outlets		
	Activity Index = 9,227			Activity Index = 6,560			Activity Index = 5,831			Activity Index = 3,236		
Feature Rate <sup>1/</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 - 9.99	490	8.12	7.99 - 11.50	221	8.34	7.99 - 13.99	435	8.76	7.99 - 9.99	42	8.75
Private Brand	6.99 - 12.99	38	9.54	6.99 - 12.99	169	8.14				12.99	2	12.99
<b>Category 2</b>												
Processor Brand	4.99 - 6.99	1,094	6.12	4.99 - 5.49	399	5.67	5.99	167	5.99	4.98 - 6.99	511	6.10
Private Brand	4.99 - 6.99	770	6.30	5.99 - 8.49	621	6.97	5.99 - 8.99	602	7.97	7.49 - 8.49	17	8.37
<b>Category 3</b>												
Processor Brand	3.49 - 4.99	98	4.10	3.70 - 4.99	75	4.60	3.99 - 4.99	30	4.12	4.48 - 4.99	151	4.96
Private Brand	3.99	235	3.99									
<b>Turkey Ham</b>												
Processor Brand	2.99	13	2.99	2.59 - 3.99	52	3.32	2.89 - 3.99	149	3.49	2.79	5	2.79
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.99 - 4.99	38	4.05	3.98 - 4.99	34	4.60	4.99	2	4.99	4.59 - 4.99	108	4.85
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 8.99	622	7.44	5.99 - 8.99	195	7.31	6.99 - 8.99	295	8.20	8.99	4	8.99
Private Brand	8.49	2	8.49	7.99 - 8.49	365	8.02	7.99	1,470	7.99	7.99	867	7.99
<b>Category 2</b>												
Processor Brand	4.49 - 5.99	166	5.45									
Private Brand	5.98 - 6.00	125	6.00									
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 4.29	1,693	3.14	2.29 - 2.69	1,529	3.41	2.50 - 3.99	713	3.44	2.29 - 3.99	512	3.66
Private Brand	2.50 - 3.59	1,009	2.93	2.50 - 3.00	707	2.77	2.50 - 3.00	626	2.83	2.50 - 3.00	218	2.96
<b>Turkey 16 oz</b>												
Processor Brand	4.49 - 6.98	130	5.58	4.99 - 5.99	100	5.30						
Private Brand	6.99	1	6.99	6.99	21	6.99	6.99	4	6.99	6.99	69	6.99
<b>Chicken 7-10 oz</b>												
Processor Brand	2.00 - 4.29	1,693	3.14	2.29 - 2.69	1,365	3.47	2.50 - 3.99	712	3.44	2.29 - 3.99	512	3.66
Private Brand	2.50 - 3.59	1,010	2.93	2.50 - 3.00	707	2.77	2.50 - 3.00	626	2.83	2.50 - 3.00	218	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)



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	ALASKA (AK)			HAWAII (HI)				
Feature Rate <sup>1/</sup>	36.6% of 100 sampled outlets			27.4% of 100 sampled outlets				
Activity Index <sup>2/</sup>	Activity Index = 173			Activity Index = 197				
	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								
Private Brand								
<b>Category 2</b>								
Processor Brand								
Private Brand								
<b>Category 3</b>								
Processor Brand								
Private Brand								
<b>Turkey Ham</b>								
Processor Brand								
Private Brand								
<b>Turkey Pastrami</b>								
Processor Brand								
Private Brand								
<b>SERVICE DELI - Chicken</b>								
<b>Category 1</b>								
Processor Brand								
Private Brand	8.99	63 8.99		8.99	81 8.99			
<b>Category 2</b>								
Processor Brand								
Private Brand								
<b>SELF-SERVICE DELI</b> (dollars per tub or pouch)								
<b>Turkey 7-10 oz</b>								
Processor Brand	3.50 - 4.99	44 4.92						
Private Brand	3.00	11 3.00		3.00 - 3.99	58 3.92			
<b>Turkey 16 oz</b>								
Processor Brand								
Private Brand								
<b>Chicken 7-10 oz</b>								
Processor Brand	3.50 - 4.99	44 4.92						
Private Brand	3.00	11 3.00		3.00 - 3.99	58 3.92			

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)