



USDA National Retail Report - Turkey
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/08 thru 05/14.

Fri. May 08, 2015

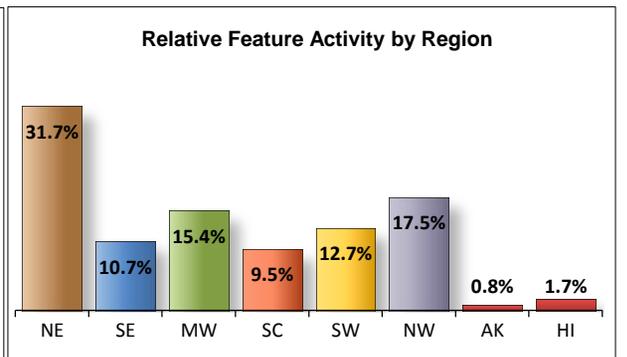
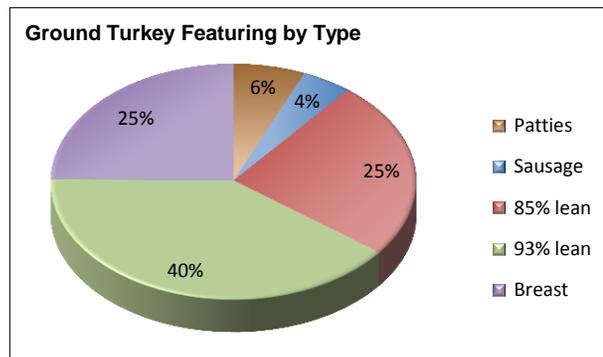
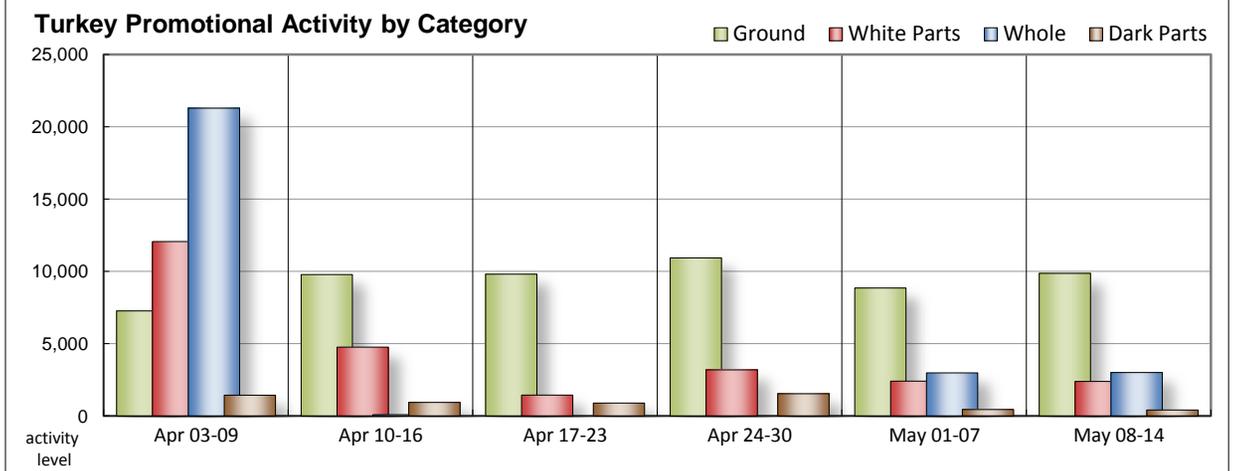
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	35.5% of 29,100 outlets		32.8% of 29,100 outlets		50.1% of 22,900 outlets	
Special Rate ^{4/}	2.2%		0.7%		1.5%	
Activity Index ^{2/}	17,847		16,609		15,350	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	1,506	1.30	1,494	1.29	50	0.99
" - Toms	1,506	1.30	1,494	1.29	50	0.99
PARTS:						
Breast:						
Bone-in, whole						
Fresh	21	2.29			120	2.07
Frozen	705	1.71	676	1.75	720	1.59
Split, bone-in						
Fresh			121	2.18	20	3.49
Rotisserie	102	6.28	349	7.33	30	7.99
Boneless, whole	49	5.32	5	5.49	50	4.98
Cutlets	1,037	5.16	947	5.15	1,070	4.96
Cutlets, thin sliced	188	4.99	11	5.99	270	4.99
Strips						
Tenders	180	4.97	270	4.36	100	4.98
Marinated Tenders	115	4.25	38	4.79	300	3.49
Drumsticks	23	1.73	115	1.88	50	1.72
Thighs			9	1.99	10	1.69
Wings	26	2.25	138	1.85	100	2.48
Necks					30	1.75
Smoked Drumsticks	167	2.40	64	2.12	200	2.63
Smoked Wings	188	2.38	64	2.12	220	2.26
Smoked Necks	17	2.49	64	2.12	210	2.25
GROUND TURKEY:	9,872	3.67	8,859	3.54	10,900	3.42
Patties	633	4.08	740	3.81	430	3.81
Sausage	442	3.81	1,012	3.69	1,020	2.96
85% lean	2,421	2.91	2,289	2.99	2,900	2.52
93% lean	3,919	3.29	3,779	3.41	3,920	3.27
Breast	2,457	4.88	1,039	4.87	2,630	4.93
Rolls (frsh/frz 1 lb.)	625	2.44	307	2.41	260	2.49
Specialty ^{5/}						
Patties	6	3.99	387	4.62		
93-94% lean	1,124	4.19	1,191	4.53	560	4.30
Breast	390	6.59	6	6.99	30	4.99

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

This Week's Turkey Feature Highlights

This week, retailers center their attention on items associated with the celebration of Mother's Day. Feature activity increases. Whole bird offerings increase slightly. Bone-in breasts see a small gain in circular space; prices are lower. Rotisserie breasts decline in both offers and pricing. White part offerings see some growth due to increased visibility of cutlets and marinated tenders. Values are lower for marinated tenders and thin sliced cutlets. Smoked dark parts are offered more often, while fresh are seen less. Prices are mostly higher. Warmer weather has retailers offering more grinds with 93% lean continuing to be most heavily promoted. However, there are several opportunities if you are looking for ground breast or 85% lean. Values are lower for 85% and 93% lean, slightly higher for ground breast, and higher for patties and sausage. Deli activity decreases with a decline in service deli offerings. Prices are lower for private label service deli meats and smaller packaged processor label self-service.



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/}	56.5% of 5,500 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 6,833			33.9% of 7,400 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 3,139			30.7% of 6,100 sampled outlets 0.7% of stores w/ no-price promotions Activity Index = 3,029		
	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	1.29	202	1.29	1.29	508	1.29	1.29	586	1.29
" - Toms	1.29	202	1.29	1.29	508	1.29	1.29	586	1.29
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.97 - 1.99	134	1.78	1.29 - 1.59	148	1.56	1.29 - 1.99	207	1.71
Split, bone-in									
Fresh									
Rotisserie	5.99	72	5.99				6.99	30	6.99
Boneless, whole	4.99 - 6.99	49	5.32						
Cutlets	4.99 - 5.49	1,016	5.16	4.99 - 5.49	5	5.19	4.79 - 5.49	16	4.83
Cutlets, thin sliced	4.99	188	4.99						
Strips									
Tenders	4.99	165	4.99				4.79	15	4.79
Marinated Tenders	4.65	45	4.65						
Drumsticks				1.69	14	1.69	1.79	9	1.79
Thighs									
Wings	2.49	17	2.49				1.79	9	1.79
Necks									
Smoked Drumsticks	2.39 - 2.49	166	2.40	2.39	1	2.39			
Smoked Wings	1.98 - 2.49	187	2.38	2.39	1	2.39			
Smoked Necks	2.49	17	2.49						
GROUND TURKEY:									
Patties	3.99	297	3.99	3.49 - 3.99	11	3.58	3.99	181	3.99
Sausage	3.19 - 4.39	227	3.79	2.99	9	2.99	3.19 - 3.99	131	3.86
85% lean	2.53 - 3.33	399	3.05	2.49 - 2.99	1,158	2.96	2.33 - 3.19	217	2.99
93% lean	2.83 - 3.84	1,544	3.17	2.69 - 3.84	667	3.03	2.69 - 3.99	792	3.33
Breast (99-100% lean)	4.22 - 5.49	861	4.98	4.16 - 5.45	58	4.55	4.58 - 5.49	15	4.64
Rolls (frsh/frz 1 lb.)	2.49	304	2.49	1.99	6	1.99	1.99 - 3.00	214	2.32
Specialty ^{5/}									
Patties	3.99	6	3.99						
93-94% lean	3.99 - 4.79	601	4.26	4.79	17	4.79	4.79	21	4.79
Breast	6.79 - 6.99	134	6.90	5.99	28	5.99			



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	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)		
Feature Rate ^{1/}	16.3% of 4,900 sampled outlets			35.2% of 3,800 sampled outlets			51.5% of 1,300 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			4.6% of stores w/ no-price promotions			29.5% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 1,858			Activity Index = 1,808			Activity Index = 1,032		
	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	1.29	169	1.29	1.29	14	1.29	1.29	3	1.29
" - Toms	1.29	169	1.29	1.29	14	1.29	1.29	3	1.29
PARTS:									
Breast:									
Bone-in, whole									
Fresh							2.29	21	2.29
Frozen	1.29 - 1.99	197	1.81				1.39 - 1.48	19	1.43
Split, bone-in									
Fresh									
Rotisserie									
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders				3.99	26	3.99	3.99	44	3.99
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.99	40	3.99	3.99	41	3.99	4.99	61	4.99
Sausage	2.79	12	2.79				4.09	61	4.09
85% lean	2.49 - 3.19	152	2.74	2.33 - 3.19	443	2.69	2.39 - 3.19	52	2.64
93% lean	3.19 - 3.99	162	3.42	3.19 - 3.99	410	3.43	3.19 - 4.39	318	4.06
Breast (99-100% lean)	4.16 - 5.19	327	4.93	4.79	833	4.79	4.79	304	4.79
Rolls (frsh/frz 1 lb.)	2.59 - 2.79	52	2.69	2.50	26	2.50	2.50	23	2.50
Specialty ^{5/}									
Patties									
93-94% lean	3.49 - 3.99	350	3.69	3.99	1	3.99	3.99 - 4.99	123	4.97
Breast	6.49	228	6.49						



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	ALASKA (AK)			HAWAII (HI)			
Feature Rate ^{1/}	36.6% of 100 sampled outlets			45.1% of 100 sampled outlets			
Special Rate ^{4/}	22.6% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			
Activity Index ^{2/}	Activity Index = 49			Activity Index = 99			
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		
WHOLE BIRDS:							
Fresh - Hens							
" - Toms							
Frozen - Hens				1.69	24	1.69	
" - Toms				1.69	24	1.69	
PARTS:							
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							
GROUND TURKEY:							
Patties	4.99	2	4.99				
Sausage	4.09	2	4.09				
85% lean							
93% lean	3.99	2	3.99	4.23	24	4.23	
Breast (99-100% lean)	4.79 - 5.59	32	5.32	5.59	27	5.59	
Rolls (frsh/frz 1 lb.)							
Specialty ^{5/}							
Patties							
93-94% lean	5.99	11	5.99				
Breast							



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	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		74.0% of 5,500 sampled outlets Activity Index = 14,149			61.1% of 7,400 sampled outlets Activity Index = 9,104		
Feature Rate ^{1/}	56.3% of 29,100 stores		56.3% of 29,100 stores		60.5% of 22,900 stores							
Activity Index ^{2/}	43,179		44,395		43,510							
	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	3,628	8.39	4,120	8.06	5,010	7.87	6.48 - 12.99	1,574	8.72	6.99 - 9.99	275	8.25
Private Brand	2,409	7.92	290	8.11	3,310	7.07	6.98 - 10.99	1,404	7.78			
Category 2												
Processor Brand	2,885	6.11	4,197	5.90	5,060	5.77	4.99 - 6.99	1,231	6.15	4.99 - 6.99	80	6.19
Private Brand	3,582	6.23	4,811	6.82	650	6.21	4.99 - 6.99	722	5.77	5.99 - 6.99	763	6.22
Category 3												
Processor Brand	584	3.91	797	3.70	1,390	4.16	2.99 - 4.59	134	3.54	3.98 - 4.59	96	4.27
Private Brand	45	4.98	8	4.99	40	4.48	4.98	45	4.98			
Turkey Ham												
Processor Brand	458	3.51	457	3.48	660	4.44	3.99 - 5.48	173	4.15	4.99	2	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	35	3.73	270	5.38	510	4.12						
Private Brand	8	3.29										
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,924	8.24	1,980	8.50	3,270	7.62	5.97 - 9.99	1,621	8.13	6.99 - 8.99	417	7.96
Private Brand	714	8.39	4,955	7.69	1,400	5.98	6.99 - 8.99	544	8.53	7.59 - 7.99	4	7.79
Category 2												
Processor Brand	419	5.51	585	5.88	360	5.07	4.59	144	4.59	5.99	57	5.99
Private Brand	1,418	5.95	220	5.99			5.60 - 5.99	981	5.97			
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,141	3.50	8,644	3.61	8,490	2.92	2.33 - 4.99	2,204	3.49	2.49 - 4.69	2,986	3.36
Private Brand	849	3.40	1,865	3.08	1,840	2.93	2.99 - 4.99	448	3.98	2.99	45	2.99
Turkey 16 oz												
Processor Brand	2,101	5.68	917	5.68	1,620	5.27	5.49 - 5.99	192	5.58	5.49 - 5.99	1,322	5.60
Private Brand	126	5.00			170	4.99	5.00	84	5.00	5.00	42	5.00
Chicken 7-10 oz												
Processor Brand	10,004	3.52	8,451	3.63	7,930	2.92	2.33 - 4.99	2,200	3.50	2.49 - 4.69	2,970	3.36
Private Brand	849	3.40	1,828	3.09	1,800	2.96	2.99 - 4.99	448	3.98	2.99	45	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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(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)		
	49.9% of 6,100 sampled outlets			36.6% of 4,900 sampled outlets			55.8% of 3,800 sampled outlets			64.2% of 1,300 sampled outlets		
	Activity Index = 8,065			Activity Index = 4,424			Activity Index = 5,138			Activity Index = 2,215		
Feature Rate ^{1/}	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
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	740 7.86	6.99	- 11.05	146 8.31	7.99	- 13.99	719 8.34	7.99	- 8.99	168 8.17
Private Brand	6.99	- 11.49	125 8.09	6.99	- 8.99	502 8.05	8.49	- 9.99	99 8.63	7.49	- 8.49	257 8.02
Category 2												
Processor Brand	4.99	- 6.99	791 6.17	4.99	- 6.99	438 6.12	4.99	- 5.99	300 5.76	5.99	- 6.49	45 6.06
Private Brand	4.99	- 6.99	1,355 6.51	5.00	- 6.99	284 5.72	5.99	- 7.99	448 6.53	5.00		10 5.00
Category 3												
Processor Brand	2.99	- 4.59	234 3.94	4.38		20 4.38	3.77	- 3.99	87 3.88	2.99	- 4.48	13 3.91
Private Brand												
Turkey Ham												
Processor Brand	2.98	- 2.99	18 2.99	2.99	- 3.69	165 3.08	2.79	- 3.49	100 3.18			
Private Brand												
Turkey Pastrami												
Processor Brand	2.98	- 6.99	25 4.10				2.79		10 2.79			
Private Brand		3.29	8 3.29									
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99	- 8.99	155 7.03	7.99	- 9.49	43 8.02	7.99	- 9.49	253 9.06	6.99	- 10.99	435 8.88
Private Brand	6.99	- 8.49	143 7.86	8.49		23 8.49						
Category 2												
Processor Brand		5.99	106 5.99	5.99		37 5.99	5.99		75 5.99			
Private Brand	3.98	- 6.00	437 5.92									
SELF-SERVICE DELI (dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.33	- 4.99	1,725 3.24	1.99	- 2.69	1,167 3.44	3.49	- 4.99	1,446 3.90	3.38	- 4.99	586 4.18
Private Brand	2.79	- 2.99	231 2.85	2.50	- 2.99	119 2.50				2.50		5 2.50
Turkey 16 oz												
Processor Brand	3.99	- 5.99	117 4.95	3.99	- 5.99	228 5.64	6.99		137 6.99	5.99		105 5.99
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.33	- 4.99	1,624 3.29	1.99	- 2.50	1,133 3.45	3.49	- 4.99	1,464 3.90	3.38	- 4.99	586 4.18
Private Brand	2.79	- 2.99	231 2.85	2.50	- 2.99	119 2.50				2.50		5 2.50

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 ^{1/}	35.5% of 100 sampled outlets			53.1% of 100 sampled outlets				
Activity Index ^{2/}	Activity Index = 24			Activity Index = 60				
	Price Range (\$/pound)	Summary Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Wtd Avg		
SERVICE DELI - Turkey								
Category 1								
Processor Brand				7.99	6	7.99		
Private Brand	8.49 - 9.49	22	8.99					
Category 2								
Processor Brand								
Private Brand								
Category 3								
Processor Brand								
Private Brand								
Turkey Ham								
Processor Brand								
Private Brand								
Turkey Pastrami								
Processor Brand								
Private Brand								
SERVICE DELI - Chicken								
Category 1								
Processor Brand								
Private Brand								
Category 2								
Processor Brand								
Private Brand								
SELF-SERVICE DELI (dollars per tub or pouch)								
Turkey 7-10 oz								
Processor Brand				3.99	27	3.99		
Private Brand	2.50	1	2.50					
Turkey 16 oz								
Processor Brand								
Private Brand								
Chicken 7-10 oz								
Processor Brand				3.99	27	3.99		
Private Brand	2.50	1	2.50					

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)

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