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Report for 3/1/2025 - 3/7/2025

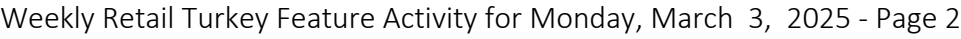
MARKET HIGHLIGHTS

This week in Turkey retail, the feature rate increased by 4.0% and the activity index increased by 7.7%. Ground, processed and prepared items increased in ad space this week. Parts, deli and variety meats deli items decreased in ad space. Whole birds remained steady. Ground and deli items continue to be the primary turkey items featured.

NATIONAL

Metric	Current Week (CW)	Previous Week (PW)	Previous Year (PY)
Total Outlets	24,824	24,824	
Activity Index	29,637	27,552	
Feature Rate (%)	54.7%	50.7%	

Section	Price Unit	Item	Environment	Condition	CW Stores	CW Wtd Avg	PW Stores	PW Wtd Avg	PY Stores	PY Wtd Avg
Whole	Per lb	Whole Turkey < 16 Lbs	Conventional	Frozen	24	1.49	24	1.49		
Parts	Per lb	Breast Cutlets, Regular	Conventional	Fresh	130	6.14	589	6.99		
		Breast Tenders, Regular	Conventional	Fresh	63	5.99				
		Drumsticks, Regular	Conventional	Fresh			168	2.45		
		Drumsticks, Regular	Conventional	Frozen	105	2.25	80	2.19		
		Split Breast, Bone-In, Regular	Conventional	Fresh			108	2.91		
		Thighs, Regular	Conventional	Fresh			108	2.16		
		Whole Breast, Bone-In, Regular	Conventional	Fresh	60	0.99	41	1.49		
		Whole Breast, Bone-In, Regular	Conventional	Frozen	387	1.42	167	1.99		
		Wings, 10 Lbs or more	Conventional	Frozen	24	2.99	24	2.99		
		Wings, Regular	Conventional	Fresh	118	2.37	18	2.99		
		Wings, Regular	Conventional	Frozen	88	2.19	120	2.05		
		Wings, Value	Conventional	Fresh			50	2.69		
Ground	Per lb	Ground Turkey (85%), 1-2 Lbs	Antibiotic Free	Fresh			262	4.99		
		Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	1,342	3.49	2,617	4.03		
		Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	2,545	3.25	1,135	3.20		
		Ground Turkey (93%), 1-2 Lbs	ABF, Free Range	Fresh	28	11.99				
		Ground Turkey (93%), 1-2 Lbs	Antibiotic Free	Fresh	23	6.99	394	4.93		
		Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	3,771	4.35	1,410	3.67		
		Ground Turkey (93%), 1-2 Lbs	USDA Organic	Fresh	177	7.99				
		Ground Turkey (93%), 1-2 Lbs	USDA Organic, Free Range	Fresh			72	8.99		



Section	Price Unit	Item	Environment	Condition	CW Stores	CW Wtd Avg	PW Stores	PW Wtd Avg	PY Stores	PY Wtd Avg
Ground	Per lb	Ground Turkey (93%), 2-4 Lbs	Conventional	Fresh	571	3.98	311	3.00		
		Ground Turkey Breast (98-100%), 1-2 Lbs	Antibiotic Free	Fresh			269	5.99		
		Ground Turkey Breast (98-100%), 1-2 Lbs	Conventional	Fresh	20	5.44	168	5.28		
		Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	375	5.16	401	5.02		
		Ground Turkey Patties, 1-2 Lbs	Conventional	Frozen	72	5.00				
		Ground Turkey Patties, 1-2 Lbs	USDA Organic, Free Range	Fresh			72	8.99		
		Ground Turkey Patties, 2-4 Lbs	Conventional	Fresh	47	5.31				
		Ground Turkey Patties, 2-4 Lbs	Conventional	Frozen			29	5.50		
Processed	Per lb	Pre-Cooked Turkey Sausage, < 1 Lb	Antibiotic Free	Prepared	302	9.12	12	12.55		
		Pre-Cooked Turkey Sausage, < 1 Lb	Conventional	Prepared	463	8.16	115	8.31		
		Pre-Cooked Turkey Sausage, 1-2 Lbs	Conventional	Frozen	72	4.50				
		Pre-Cooked Turkey Sausage, 1-2 Lbs	Conventional	Prepared	90	4.99	172	6.99		
		Turkey Bacon, < 1 Lb	Conventional	Fresh	3,113	5.38	1,231	5.96		
		Turkey Sausage, 1-2 Lbs	Conventional	Fresh	58	3.99	18	3.99		
Prepared	Per lb	Drumsticks, Smoked	Conventional	Prepared	120	3.49				
		Necks, Smoked	Conventional	Prepared	120	3.49				
		Rotisserie Split Breast, Bone-In	Conventional	Prepared			92	6.77		
		Wings, Smoked	Conventional	Prepared	120	3.49				
Deli	Per lb	Self-Service Deli Tub/Pouch, < 5 oz	Conventional	Prepared	124	5.31	182	6.15		
		Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	578	4.19	175	4.31		
		Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	1,215	6.41	4,033	6.07		
		Self-Service Deli Tub/Pouch, 5-15 oz	Antibiotic Free	Prepared	120	13.69				
		Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	5,605	8.46	4,755	8.05		
		Self-Service Deli Tub/Pouch, 5-15 oz	USDA Organic	Prepared	91	16.49	167	18.68		
		Service Deli - Cat 1	Conventional	Prepared	4,994	10.34	5,288	10.28		
		Service Deli - Cat 2	Conventional	Prepared	947	7.68	742	7.51		
		Service Deli - Cat 3	Conventional	Prepared	235	5.95	1,528	5.76		
		Service Deli Pastrami	Conventional	Prepared	411	6.90				
Service Deli Turkey Ham	Conventional	Prepared	799	5.62	290	5.17				



Section	Price Unit	Item	Environment	Condition	CW Stores	CW Wtd Avg	PW Stores	PW Wtd Avg	PY Stores	PY Wtd Avg
Variety Meat	Per lb	Gizzards	Conventional	Frozen	40	1.58				
		Necks	Conventional	Fresh	50	1.99	50	1.99		
		Necks	Conventional	Frozen			65	1.99		

NORTHEAST REGION (CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT)

Metric	Current Week (CW)
Total Outlets	4,853
Activity Index	10,168
Feature Rate (%)	60.1%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Whole		Per lb	Whole Turkey < 16 Lbs	Conventional	Frozen	21	1.49 - 1.49	1.49
Parts	Per lb		Breast Cutlets, Regular	Conventional	Fresh	130	5.99 - 6.99	6.14
			Breast Tenders, Regular	Conventional	Fresh	16	5.99 - 5.99	5.99
			Drumsticks, Regular	Conventional	Frozen	105	1.99 - 2.59	2.25
			Whole Breast, Bone-In, Regular	Conventional	Frozen	297	0.99 - 1.99	1.35
			Wings, 10 Lbs or more	Conventional	Frozen	21	2.99 - 2.99	2.99
			Wings, Regular	Conventional	Fresh	65	1.99 - 2.59	2.15
			Wings, Regular	Conventional	Frozen	88	1.99 - 2.39	2.19
Ground	Per lb		Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	335	2.99 - 5.00	3.77
			Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	567	3.00 - 4.66	3.49
			Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	1075	3.84 - 5.99	4.62
			Ground Turkey (93%), 2-4 Lbs	Conventional	Fresh	302	4.33 - 4.33	4.33
			Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	182	5.61 - 5.95	5.92
			Ground Turkey Patties, 1-2 Lbs	Conventional	Frozen	72	5.00 - 5.00	5.00
			Ground Turkey Patties, 2-4 Lbs	Conventional	Fresh	18	5.00 - 5.00	5.00
Processed	Per lb		Pre-Cooked Turkey Sausage, < 1 Lb	Antibiotic Free	Prepared	302	9.12 - 9.12	9.12
			Pre-Cooked Turkey Sausage, < 1 Lb	Conventional	Prepared	374	7.98 - 9.57	8.29
			Pre-Cooked Turkey Sausage, 1-2 Lbs	Conventional	Frozen	72	4.50 - 4.50	4.50
			Turkey Bacon, < 1 Lb	Conventional	Fresh	1390	3.99 - 6.67	5.24
Prepared	Per lb		Drumsticks, Smoked	Conventional	Prepared	120	3.49 - 3.49	3.49
			Necks, Smoked	Conventional	Prepared	120	3.49 - 3.49	3.49
			Wings, Smoked	Conventional	Prepared	120	3.49 - 3.49	3.49
Deli	Per lb		Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	93	3.42 - 3.42	3.42
			Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	61	5.99 - 5.99	5.99



Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Deli		Per lb	Self-Service Deli Tub/Pouch, 5-15 oz	Antibiotic Free	Prepared	120	13.69 - 13.69	13.69
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	845	7.11 - 15.98	9.79
			Self-Service Deli Tub/Pouch, 5-15 oz	USDA Organic	Prepared	44	21.31 - 21.31	21.31
			Service Deli - Cat 1	Conventional	Prepared	1694	7.99 - 12.99	10.97
			Service Deli - Cat 2	Conventional	Prepared	681	5.99 - 8.99	7.76
			Service Deli - Cat 3	Conventional	Prepared	44	6.99 - 6.99	6.99
			Service Deli Pastrami	Conventional	Prepared	411	5.99 - 6.99	6.90
			Service Deli Turkey Ham	Conventional	Prepared	383	5.99 - 6.99	6.84

SOUTHEAST REGION (AL, FL, GA, MS, NC, SC, TN, VA, WV)

Metric	Current Week (CW)
Total Outlets	6,580
Activity Index	6,385
Feature Rate (%)	46.2%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Whole		Per lb	Whole Turkey < 16 Lbs	Conventional	Frozen	3	1.49 - 1.49	1.49
Parts		Per lb	Breast Tenders, Regular	Conventional	Fresh	7	5.99 - 5.99	5.99
			Whole Breast, Bone-In, Regular	Conventional	Fresh	8	0.99 - 0.99	0.99
			Whole Breast, Bone-In, Regular	Conventional	Frozen	59	1.99 - 1.99	1.99
			Wings, 10 Lbs or more	Conventional	Frozen	3	2.99 - 2.99	2.99
			Wings, Regular	Conventional	Fresh	53	1.99 - 2.69	2.65
Ground		Per lb	Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	488	2.50 - 3.50	2.86
			Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	1128	3.00 - 4.00	3.01
			Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	288	3.84 - 4.99	3.91
			Ground Turkey (93%), 2-4 Lbs	Conventional	Fresh	28	3.29 - 3.29	3.29
			Ground Turkey Breast (98-100%), 1-2 Lbs	Conventional	Fresh	19	5.44 - 5.44	5.44
Processed		Per lb	Pre-Cooked Turkey Sausage, < 1 Lb	Conventional	Prepared	60	7.98 - 7.98	7.98
			Turkey Bacon, < 1 Lb	Conventional	Fresh	1298	4.67 - 6.67	5.40
Deli		Per lb	Self-Service Deli Tub/Pouch, < 5 oz	Conventional	Prepared	38	6.32 - 6.32	6.32
			Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	136	3.42 - 4.36	3.74
			Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	561	5.69 - 7.99	6.14
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	1314	4.80 - 12.55	8.71
			Self-Service Deli Tub/Pouch, 5-15 oz	USDA Organic	Prepared	2	11.97 - 11.97	11.97
			Service Deli - Cat 1	Conventional	Prepared	785	9.99 - 13.99	10.53
			Service Deli - Cat 2	Conventional	Prepared	17	7.99 - 7.99	7.99
Variety Meat		Per lb	Gizzards	Conventional	Frozen	40	1.58 - 1.58	1.58
			Necks	Conventional	Fresh	50	1.99 - 1.99	1.99



MIDWEST REGION (IA, IL, IN, KY, MI, MN, ND, NE, OH, SD, WI)

Metric	Current Week (CW)
Total Outlets	4,639
Activity Index	5,225
Feature Rate (%)	62.4%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Parts		Per lb	Breast Tenders, Regular	Conventional	Fresh	11	5.99 - 5.99	5.99
			Whole Breast, Bone-In, Regular	Conventional	Frozen	31	0.97 - 0.97	0.97
Ground		Per lb	Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	86	3.50 - 4.99	4.13
			Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	449	3.33 - 3.66	3.41
			Ground Turkey (93%), 1-2 Lbs	Antibiotic Free	Fresh	23	6.99 - 6.99	6.99
			Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	749	3.99 - 5.49	4.39
			Ground Turkey (93%), 2-4 Lbs	Conventional	Fresh	172	3.29 - 4.00	3.73
			Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	58	4.99 - 5.99	5.28
Processed		Per lb	Pre-Cooked Turkey Sausage, 1-2 Lbs	Conventional	Prepared	90	4.99 - 4.99	4.99
			Turkey Bacon, < 1 Lb	Conventional	Fresh	264	5.32 - 7.98	6.33
			Turkey Sausage, 1-2 Lbs	Conventional	Fresh	58	3.99 - 3.99	3.99
Deli		Per lb	Self-Service Deli Tub/Pouch, < 5 oz	Conventional	Prepared	79	4.00 - 5.36	4.88
			Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	90	3.42 - 4.36	4.25
			Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	131	5.99 - 6.49	6.10
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	1802	3.54 - 12.55	8.74
			Self-Service Deli Tub/Pouch, 5-15 oz	USDA Organic	Prepared	39	11.97 - 11.97	11.97
			Service Deli - Cat 1	Conventional	Prepared	775	7.99 - 11.99	9.37
			Service Deli - Cat 2	Conventional	Prepared	246	6.99 - 7.99	7.43
			Service Deli - Cat 3	Conventional	Prepared	56	4.99 - 6.99	5.92
			Service Deli Turkey Ham	Conventional	Prepared	16	4.99 - 4.99	4.99

SOUTH CENTRAL REGION (AR, CO, KS, LA, MO, NM, OK, TX)

Metric	Current Week (CW)
Total Outlets	3,705
Activity Index	2,989
Feature Rate (%)	49.3%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Parts		Per lb	Whole Breast, Bone-In, Regular	Conventional	Fresh	52	0.99 - 0.99	0.99
Ground		Per lb	Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	174	2.29 - 4.48	3.89
			Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	29	3.33 - 3.33	3.33
			Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	378	2.97 - 5.00	3.94
			Ground Turkey (93%), 2-4 Lbs	Conventional	Fresh	69	3.33 - 3.33	3.33



Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Ground		Per lb	Ground Turkey Breast (98-100%), 1-2 Lbs	Conventional	Fresh	1	5.44 - 5.44	5.44
			Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	76	4.17 - 4.17	4.17
			Ground Turkey Patties, 2-4 Lbs	Conventional	Fresh	29	5.50 - 5.50	5.50
Processed		Per lb	Pre-Cooked Turkey Sausage, < 1 Lb	Conventional	Prepared	29	6.98 - 6.98	6.98
			Turkey Bacon, < 1 Lb	Conventional	Fresh	161	3.99 - 5.99	4.84
Deli		Per lb	Self-Service Deli Tub/Pouch, < 5 oz	Conventional	Prepared	7	4.72 - 4.72	4.72
			Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	110	4.36 - 4.72	4.54
			Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	59	5.97 - 6.99	6.04
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	782	3.99 - 12.55	7.13
			Self-Service Deli Tub/Pouch, 5-15 oz	USDA Organic	Prepared	6	11.97 - 11.97	11.97
			Service Deli - Cat 1	Conventional	Prepared	880	8.99 - 13.99	10.11
			Service Deli - Cat 2	Conventional	Prepared	3	6.99 - 6.99	6.99
			Service Deli - Cat 3	Conventional	Prepared	59	4.97 - 4.97	4.97
			Service Deli Turkey Ham	Conventional	Prepared	85	2.99 - 4.77	4.38

SOUTHWEST REGION (AZ, CA, NV, UT)

Metric	Current Week (CW)
Total Outlets	3,675
Activity Index	3,659
Feature Rate (%)	54.9%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Parts		Per lb	Breast Tenders, Regular	Conventional	Fresh	25	5.99 - 5.99	5.99
Ground		Per lb	Ground Turkey (85%), 1-2 Lbs	Conventional	Fresh	259	3.50 - 3.99	3.82
			Ground Turkey (85%), 2-4 Lbs	Conventional	Fresh	372	2.99 - 4.33	3.42
			Ground Turkey (93%), 1-2 Lbs	ABF, Free Range	Fresh	28	11.99 - 11.99	11.99
			Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	796	3.99 - 4.99	4.18
			Ground Turkey (93%), 1-2 Lbs	USDA Organic	Fresh	118	7.99 - 7.99	7.99
			Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	59	3.99 - 3.99	3.99
			Ground Turkey Patties, 1-2 Lbs	Conventional	Fresh	59	3.99 - 3.99	3.99
Deli		Per lb	Self-Service Deli Tub/Pouch, > 16 oz	Conventional	Prepared	149	3.42 - 6.90	4.80
			Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	361	5.97 - 7.99	7.01
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	664	4.44 - 9.98	7.56
			Service Deli - Cat 1	Conventional	Prepared	437	9.99 - 12.99	10.12
			Service Deli - Cat 3	Conventional	Prepared	76	5.99 - 6.99	6.13
			Service Deli Turkey Ham	Conventional	Prepared	315	2.99 - 6.49	4.52

NORTHWEST REGION (ID, MT, OR, WA, WY)

Metric	Current Week (CW)
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Total Outlets	1,172
Activity Index	1,123
Feature Rate (%)	68.9%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Parts		Per lb	Breast Tenders, Regular	Conventional	Fresh	4	5.99 - 5.99	5.99
Ground		Per lb	Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	439	3.99 - 5.99	4.54
			Ground Turkey (93%), 1-2 Lbs	USDA Organic	Fresh	59	7.99 - 7.99	7.99
Deli		Per lb	Self-Service Deli Tub/Pouch, 16 oz	Conventional	Prepared	42	6.99 - 6.99	6.99
			Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	181	3.56 - 9.12	7.04
			Service Deli - Cat 1	Conventional	Prepared	398	7.99 - 10.99	9.91

ALASKA (AK)

Metric	Current Week (CW)
Total Outlets	91
Activity Index	51
Feature Rate (%)	44.0%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Ground		Per lb	Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	23	3.99 - 5.99	4.95
Deli		Per lb	Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	3	6.19 - 6.19	6.19
			Service Deli - Cat 1	Conventional	Prepared	25	9.99 - 10.99	10.87

HAWAII (HI)

Metric	Current Week (CW)
Total Outlets	109
Activity Index	37
Feature Rate (%)	27.5%

Section	Quality	Price Unit	Item	Environment	Condition	Stores	Price Range	Wtd Avg
Ground		Per lb	Ground Turkey (93%), 1-2 Lbs	Conventional	Fresh	23	3.99 - 3.99	3.99
Deli		Per lb	Self-Service Deli Tub/Pouch, 5-15 oz	Conventional	Prepared	14	4.65 - 6.98	5.82

Explanatory Notes:

FEATURE RATE: the amount of sampled stores advertising any reported item during the current week, expressed as a 'percentage of the total sample.

ACTIVITY INDEX: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised item (e.g., a retailer with 100 outlets featuring 3 items has an activity index of 300).

STORES/AVG: the number of advertising outlets and the weighted average price weighted by the respective number of outlets.