



USDA Weekly Retail Turkey Feature Activity

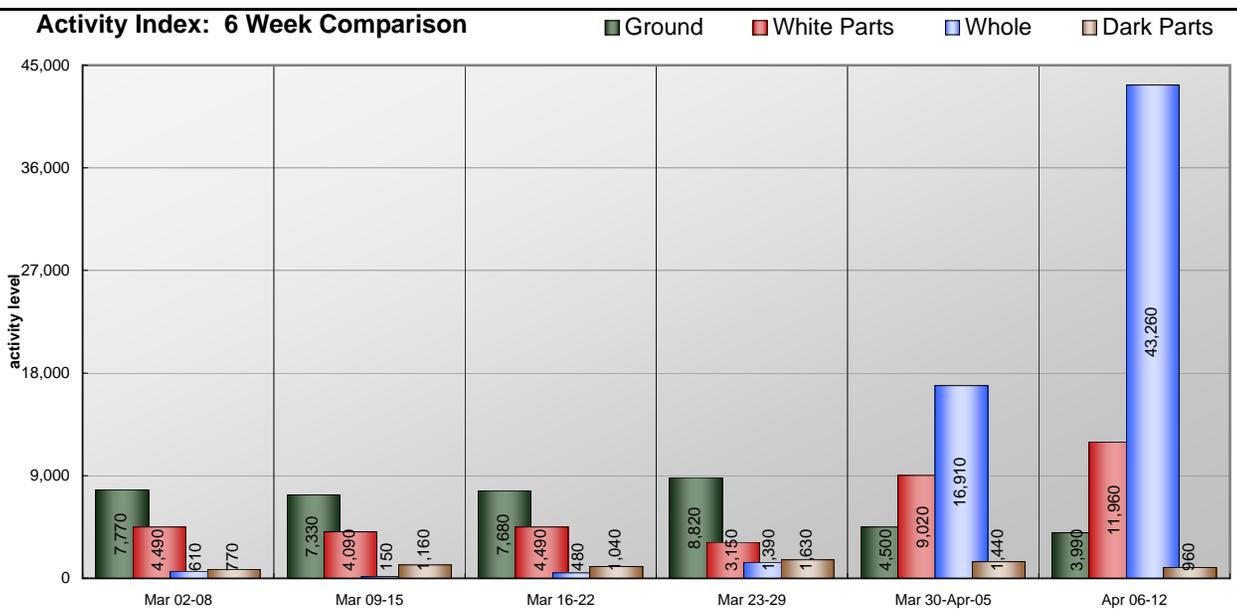
Fri. Apr 06, 2007

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/06 thru 04/12.

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

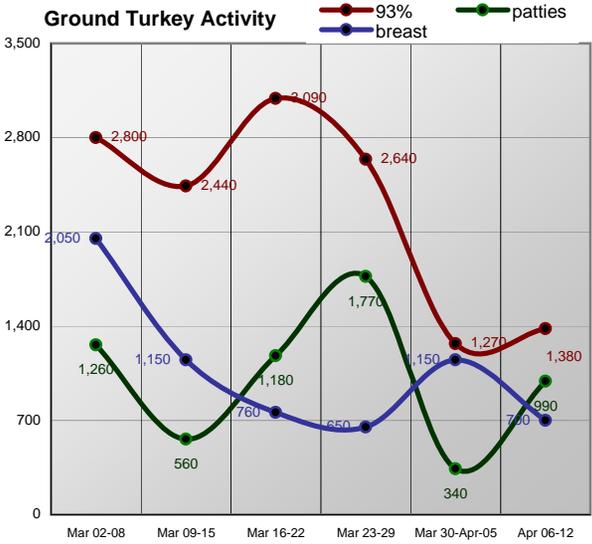
| NATIONAL SUMMARY | | | | | | |
|--------------------------|--------------------------------|----------------|--------------------------------|----------------|--------------------------------|----------------|
| | THIS WEEK | | LAST WEEK | | LAST YEAR | |
| Feature Rate 1/ | 88.6% of 17,000 outlets | | 55.1% of 17,000 outlets | | 52.2% of 17,000 outlets | |
| Special Rate 4/ | 8.8% | | 2.5% | | 10.3% | |
| Activity Index 2/ | 60,810 | | 32,510 | | 29,100 | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRDS: | | | | | | |
| Fresh - Hens | 15,070 | 1.18 | 6,900 | 1.17 | 5,040 | 1.18 |
| " - Toms | 13,190 | 1.18 | 5,430 | 1.18 | 4,900 | 1.19 |
| Frozen - Hens | 7,830 | 0.84 | 2,380 | 0.91 | 3,070 | 0.89 |
| " - Toms | 7,170 | 0.84 | 2,200 | 0.91 | 3,120 | 0.89 |
| PARTS: | | | | | | |
| Breast: | | | | | | |
| Bone-in, whole | | | | | | |
| Fresh | 4,710 | 2.00 | 2,180 | 2.17 | 2,510 | 1.91 |
| Frozen | 5,260 | 1.63 | 1,830 | 1.67 | 2,070 | 1.66 |
| Hotel Style | | | | | | |
| Fresh | | | 250 | 1.59 | | |
| Frozen | | | | | 880 | 1.79 |
| Split, bone-in | | | | | | |
| Fresh | | | | | | |
| Rotisserie | 1,110 | 6.72 | 2,550 | 7.30 | 570 | 6.00 |
| Boneless, whole | 600 | 4.49 | 680 | 4.00 | 60 | 3.39 |
| Cutlets | 140 | 3.99 | 810 | 4.30 | 630 | 4.01 |
| Cutlets, thin sliced | | | 120 | 3.99 | 90 | 4.54 |
| Strips | | | | | | |
| Tenders | 140 | 3.49 | 600 | 3.98 | 210 | 3.94 |
| Marinated Tenders | 630 | 3.58 | 590 | 3.72 | | |
| Drumsticks | | | | | | |
| Thighs | 320 | 1.29 | 540 | 0.99 | 420 | 1.37 |
| Wings | 320 | 1.29 | 230 | 0.99 | | |
| Necks | | | 540 | 0.99 | 420 | 1.37 |
| Smoked Drumsticks | | | 110 | 0.79 | | |
| Smoked Wings | | | 10 | 2.49 | 50 | 1.23 |
| Smoked Necks | | | 10 | 2.49 | | |
| GROUND TURKEY: | | | | | | |
| Patties | 3,990 | 2.65 | 4,500 | 2.71 | 5,060 | 2.35 |
| Sausage | 990 | 2.57 | 340 | 2.59 | 490 | 2.61 |
| 85% lean | 580 | 2.53 | 1,240 | 2.63 | 1,160 | 2.40 |
| 93% lean | 340 | 2.02 | 500 | 1.78 | 1,000 | 1.52 |
| Breast | 1,380 | 2.35 | 1,270 | 2.29 | 1,810 | 2.19 |
| Rolls (frsh/frz 1 lb.) | 700 | 3.75 | 1,150 | 3.70 | 600 | 3.96 |
| | 10 | 1.00 | 50 | 1.50 | -- | -- |

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



Turkey Featuring - 04/06 thru 04/12

Whole turkey features dominate ad space, second only to hams for Easter observances. Across the nation, nearly 90% of all sampled stores are promoting turkey, nearly double from last week. Feature pricing is about unchanged on fresh but sharply lower on frozen as retailers typically shift focus to fresh in the few days prior to the holiday. Compared to the week of Easter last year, feature activity on hens and toms is lower and, while fresh prices are higher, frozen prices are lower. Offers of whole breasts are sharply higher at lower prices compared to a week earlier. This is the last big retail push on whole birds and bone-in breasts until the fall holiday season. Offers of all other parts are light as attention focuses on holiday items. Ground turkey ads continue to fall in volume, the weighted average price is slightly higher.



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.)



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| | EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV) | | | CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI) | | | WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY) | | |
|--|---|---------------------------|------|--|---------------------------|------|---|---------------------------|------|
| Feature Rate 1/ Special Rate 4/ Activity Index 2/ | 90.1% of 7,900 sampled outlets 4.3% of stores w/ no-price promotions Activity Index = 29,300 | | | 89.0% of 5,200 sampled outlets 18.7% of stores w/ no-price promotions Activity Index = 14,910 | | | 85.2% of 3,900 sampled outlets 5.1% of stores w/ no-price promotions Activity Index = 16,590 | | |
| | 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 | 0.97 - 1.49 | 6,660 | 1.13 | 0.98 - 1.49 | 4,270 | 1.20 | 0.97 - 1.49 | 4,140 | 1.22 |
| " - Toms | 0.97 - 1.49 | 5,720 | 1.12 | 0.98 - 1.49 | 3,870 | 1.21 | 0.97 - 1.49 | 3,600 | 1.24 |
| Frozen - Hens | 0.59 - 1.29 | 4,000 | 0.87 | 0.57 - 1.19 | 1,700 | 0.90 | 0.69 - 0.99 | 2,130 | 0.72 |
| " - Toms | 0.59 - 1.29 | 3,790 | 0.89 | 0.59 - 1.19 | 1,410 | 0.91 | 0.69 - 0.99 | 1,970 | 0.71 |
| PARTS: | | | | | | | | | |
| Breast: | | | | | | | | | |
| Bone-in, whole | | | | | | | | | |
| Fresh | 1.69 - 2.49 | 1,660 | 2.06 | 1.49 - 2.79 | 1,630 | 1.96 | 1.99 | 1,420 | 1.99 |
| Frozen | 1.19 - 2.99 | 3,660 | 1.63 | 1.28 - 1.99 | 1,150 | 1.62 | 1.39 - 1.99 | 450 | 1.66 |
| Hotel Style | | | | | | | | | |
| Fresh | | | | | | | | | |
| Frozen | | | | | | | | | |
| Split, bone-in | | | | | | | | | |
| Fresh | | | | | | | | | |
| Rotisserie | 5.99 - 8.99 | 660 | 6.44 | 5.99 - 7.49 | 220 | 6.34 | 6.99 - 7.99 | 230 | 7.90 |
| Boneless, whole | 4.49 | 600 | 4.49 | | | | | | |
| Cutlets | 3.99 | 140 | 3.99 | | | | | | |
| Cutlets, thin sliced | | | | | | | | | |
| Strips | | | | | | | | | |
| Tenders | 3.49 | 140 | 3.49 | | | | | | |
| Marinated Tenders | | | | 3.73 | 120 | 3.73 | 2.93 - 3.73 | 510 | 3.54 |
| Drumsticks | | | | | | | 1.29 | 320 | 1.29 |
| Thighs | | | | | | | 1.29 | 320 | 1.29 |
| Wings | | | | | | | 1.29 | 320 | 1.29 |
| Necks | | | | | | | | | |
| Smoked Drumsticks | | | | | | | | | |
| Smoked Wings | | | | | | | | | |
| Smoked Necks | | | | | | | | | |
| GROUND TURKEY: | | | | | | | | | |
| Patties | 2.29 - 2.69 | 580 | 2.54 | | | | 2.50 - 3.00 | 410 | 2.62 |
| Sausage | 2.39 - 3.00 | 400 | 2.56 | 2.40 - 2.59 | 160 | 2.46 | 2.46 | 20 | 2.46 |
| 85% lean | 1.99 - 2.19 | 140 | 2.00 | 2.00 - 2.30 | 200 | 2.04 | | | |
| 93% lean | 2.00 - 2.40 | 940 | 2.24 | 2.40 | 100 | 2.40 | 2.39 - 2.79 | 340 | 2.62 |
| Breast (99-100% lean) | 2.99 - 3.49 | 210 | 3.00 | 2.99 - 3.07 | 80 | 3.04 | 3.99 - 4.39 | 410 | 4.28 |
| Rolls (frsh/frz 1 lb.) | | | | 1.00 | 10 | 1.00 | | | |

A full breakdown of supermarket promotions featuring turkey and other poultry for Easter and Passover will be available on April 6, 2007 on our website at:

www.ams.usda.gov/poultry/mncs/Holiday%20Ads/HolidayAds.htm

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, roaster chickens, capons, cornish hens, ducklings, geese, baking hens, shell eggs, and liquid eggs.

This and all of our other holiday promotions reports are also available in spreadsheet format. Please contact us at the number/e-mail address below to receive the spreadsheet files.

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