



**USDA Weekly Retail Turkey Feature Activity**

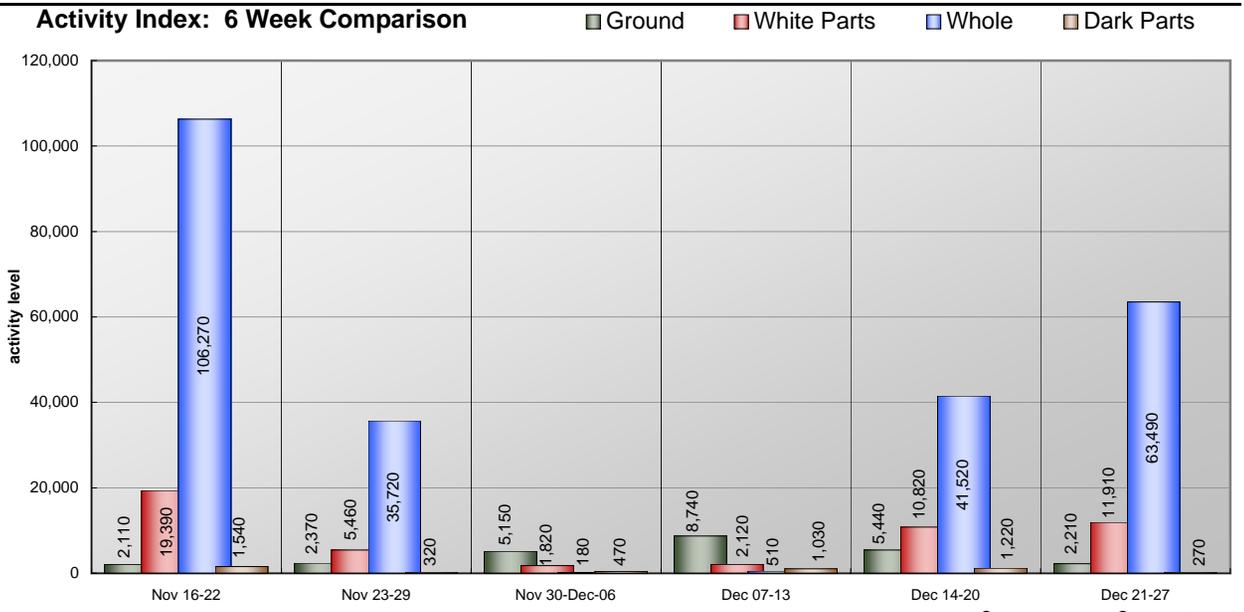
Fri. Dec 21, 2007

**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/21 thru 12/27.**

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

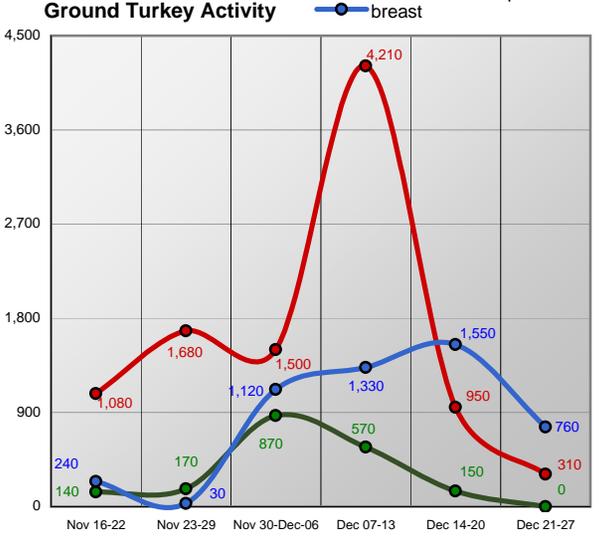
| NATIONAL SUMMARY         |                         |         |                         |         |                         |         |
|--------------------------|-------------------------|---------|-------------------------|---------|-------------------------|---------|
|                          | THIS WEEK               |         | LAST WEEK               |         | LAST YEAR               |         |
| <b>Feature Rate 1/</b>   | 92.6% of 17,000 outlets |         | 74.1% of 17,000 outlets |         | 90.4% of 17,000 outlets |         |
| <b>Special Rate 4/</b>   | 7.5%                    |         | 3.2%                    |         | 5.8%                    |         |
| <b>Activity Index 2/</b> | 78,370                  |         | 59,130                  |         | 69,180                  |         |
| <b>3/</b>                | Stores                  | Wtd Avg | Stores                  | Wtd Avg | Stores                  | Wtd Avg |
| <b>WHOLE BIRDS:</b>      |                         |         |                         |         |                         |         |
| Fresh - Hens             | 16,360                  | 1.28    | 8,510                   | 1.28    | 16,210                  | 1.21    |
| " - Toms                 | 15,990                  | 1.29    | 8,810                   | 1.28    | 16,060                  | 1.20    |
| Frozen - Hens            | 15,360                  | 0.93    | 11,910                  | 0.97    | 10,970                  | 0.86    |
| " - Toms                 | 15,780                  | 0.93    | 12,290                  | 0.96    | 10,690                  | 0.86    |
| <b>PARTS:</b>            |                         |         |                         |         |                         |         |
| <b>Breast:</b>           |                         |         |                         |         |                         |         |
| <b>Bone-in, whole</b>    |                         |         |                         |         |                         |         |
| Fresh                    | 4,030                   | 2.15    | 1,900                   | 2.24    | 3,340                   | 2.14    |
| Frozen                   | 6,620                   | 1.73    | 6,520                   | 1.69    | 6,280                   | 1.56    |
| <b>Hotel Style</b>       |                         |         |                         |         |                         |         |
| Fresh                    | 220                     | 1.89    | 20                      | 1.91    | 80                      | 1.99    |
| Frozen                   |                         |         |                         |         | 10                      | 1.59    |
| <b>Split, bone-in</b>    |                         |         |                         |         |                         |         |
| Fresh                    | 10                      | 1.99    | 10                      | 1.69    | 20                      | 2.48    |
| Rotisserie               | 160                     | 8.43    | 1,040                   | 6.48    | 1,980                   | 7.95    |
| <b>Boneless, whole</b>   |                         |         |                         |         |                         |         |
| Cutlets                  | 380                     | 4.41    | 840                     | 4.14    | 90                      | 3.99    |
| Cutlets, thin sliced     |                         |         | 10                      | 4.99    |                         |         |
| <b>Strips</b>            |                         |         |                         |         |                         |         |
| Tenders                  | 460                     | 3.77    | 460                     | 3.76    | 210                     | 3.91    |
| Marinated Tenders        | 490                     | 4.00    | 30                      | 4.00    | 50                      | 3.99    |
| <b>Drumsticks</b>        |                         |         |                         |         |                         |         |
| Thighs                   | 90                      | 0.89    | 140                     | 1.03    | 20                      | 1.17    |
| Wings                    | 90                      | 0.89    | 50                      | 1.29    | 30                      | 1.22    |
| Necks                    |                         |         |                         |         | 20                      | 1.17    |
| Smoked Drumsticks        |                         |         | 280                     | 1.54    | 140                     | 1.59    |
| Smoked Wings             |                         |         | 350                     | 1.63    | 140                     | 1.59    |
| Smoked Necks             |                         |         | 270                     | 1.51    |                         |         |
| <b>GROUND TURKEY:</b>    | 2,210                   | 2.70    | 5,440                   | 2.84    | 2,840                   | 2.54    |
| Patties                  |                         |         | 150                     | 2.53    | 110                     | 2.41    |
| Sausage                  | 480                     | 2.67    | 1,650                   | 2.56    | 730                     | 2.48    |
| 85% lean                 | 660                     | 1.60    | 1,140                   | 2.00    | 210                     | 1.52    |
| 93% lean                 | 310                     | 2.32    | 950                     | 2.34    | 1,470                   | 2.41    |
| Breast                   | 760                     | 3.84    | 1,550                   | 4.08    | 320                     | 3.97    |
| Rolls (frsh/frz 1 lb.)   |                         |         | 100                     | 1.00    |                         |         |

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



**Turkey Featuring - 12/21 thru 12/27**

Feature activity going into the holiday weekend is very active on fresh and frozen whole turkeys and fresh and frozen bone-in breasts as retailers hope for a good year end clearance. Coupons and other discounts on whole turkeys and bone-in breasts draw shoppers attention this week. The volumes of whole birds and bone-in whole breasts are higher compared to a year earlier, especially on frozen hens and toms. Other turkey items are offered sporadically. Dark parts all but disappeared and offers for boneless breast meat items are limited. Ground turkey offers are the lightest they have been since the week of Thanksgiving. The limited promotions are most active on the 85% lean and ground breasts at sharply lower prices.



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.<br>(CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ,<br>NY,PA,RI,SC,VA,VT,WV)                        |                           |      | CENTRAL U.S.<br>(AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND,<br>NE, OH, OK,SD,TN,TX,WI)                 |                           |      | WESTERN U.S.<br>(AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)   |                           |      |
|---|--|---------------------------|------|---|---------------------------|------|--|---------------------------|------|
| Feature Rate 1/<br>Special Rate 4/<br>Activity Index 2/ | 98.3% of 7,950 sampled outlets<br>7.6% of stores w/ no-price promotions<br>Activity Index = 40,970 |                           |      | 88.6% of 5,300 sampled outlets<br>10.6% of stores w/ no-price promotions<br>Activity Index = 22,510 |                           |      | 86.8% of 3,750 sampled outlets<br>3.1% of stores w/ no-price promotions<br>Activity Index = 14,890 |                           |      |
|   | Price Range<br>(\$/pound)  | Summary<br>Stores Wtd Avg |      | Price Range<br>(\$/pound)   | Summary<br>Stores Wtd Avg |      | Price Range<br>(\$/pound)  | Summary<br>Stores Wtd Avg |      |
| <b>WHOLE BIRDS:</b>                                     |  |                           |      |   |                           |      |  |                           |      |
| Fresh - Hens  | 0.89 - 1.79  | 8,280                     | 1.26 | 0.97 - 1.89   | 4,260                     | 1.32 | 0.98 - 1.69  | 3,820                     | 1.31 |
| " - Toms  | 0.89 - 1.69  | 8,190                     | 1.25 | 0.97 - 1.89   | 4,300                     | 1.33 | 0.99 - 1.69  | 3,500                     | 1.34 |
| Frozen - Hens   | 0.29 - 1.39  | 8,100                     | 0.91 | 0.67 - 1.49   | 5,140                     | 0.96 | 0.68 - 1.19  | 2,120                     | 0.93 |
| " - Toms  | 0.29 - 1.49  | 8,390                     | 0.91 | 0.59 - 1.49   | 5,140                     | 0.96 | 0.68 - 1.19  | 2,250                     | 0.94 |
| <b>PARTS:</b>   |  |                           |      |   |                           |      |  |                           |      |
| <b>Breast:</b>  |  |                           |      |   |                           |      |  |                           |      |
| Bone-in, whole  |  |                           |      |   |                           |      |  |                           |      |
| Fresh   | 1.49 - 2.99  | 2,030                     | 2.21 | 1.48 - 2.49   | 1,210                     | 2.08 | 1.69 - 2.99  | 790                       | 2.10 |
| Frozen  | 0.87 - 2.19  | 4,530                     | 1.69 | 0.99 - 2.59   | 1,730                     | 1.81 | 1.79 - 1.89  | 360                       | 1.79 |
| Hotel Style   |  |                           |      |   |                           |      |  |                           |      |
| Fresh   | 1.69 - 1.99  | 220                       | 1.89 |   |                           |      |  |                           |      |
| Frozen  |  |                           |      |   |                           |      |  |                           |      |
| Split, bone-in  |  |                           |      |   |                           |      |  |                           |      |
| Fresh   | 1.99   | 10                        | 1.99 |   |                           |      |  |                           |      |
| Rotisserie  | 6.99   | 10                        | 6.99 | 6.99 - 8.99   | 150                       | 8.53 |  |                           |      |
| Boneless, whole   | 3.99   | 20                        | 3.99 | 3.68  | 10                        | 3.68 |  |                           |      |
| Cutlets   | 3.99   | 90                        | 3.99 |   |                           |      | 4.54   | 290                       | 4.54 |
| Cutlets, thin sliced                                    |  |                           |      |   |                           |      |  |                           |      |
| Strips  |  |                           |      |   |                           |      |  |                           |      |
| Tenders   | 3.99   | 40                        | 3.99 |   |                           |      | 3.19 - 3.99  | 420                       | 3.75 |
| Marinated Tenders                                       | 3.73   | 240                       | 3.73 |   |                           |      | 4.26   | 250                       | 4.26 |
| Drumsticks  |  |                           |      | 0.89  | 90                        | 0.89 |  |                           |      |
| Thighs  |  |                           |      | 0.89  | 90                        | 0.89 |  |                           |      |
| Wings   |  |                           |      | 0.89  | 90                        | 0.89 |  |                           |      |
| Necks   |  |                           |      |   |                           |      |  |                           |      |
| Smoked Drumsticks                                       |  |                           |      |   |                           |      |  |                           |      |
| Smoked Wings  |  |                           |      |   |                           |      |  |                           |      |
| Smoked Necks  |  |                           |      |   |                           |      |  |                           |      |
| <b>GROUND TURKEY:</b>                                   |  |                           |      |   |                           |      |  |                           |      |
| Patties   |  |                           |      |   |                           |      |  |                           |      |
| Sausage   | 2.00 - 3.19  | 360                       | 2.52 | 1.99 - 3.19   | 120                       | 3.12 |  |                           |      |
| 85% lean  | 1.50 - 1.54  | 320                       | 1.53 | 1.54  | 30                        | 1.54 | 1.69   | 310                       | 1.69 |
| 93% lean  | 1.53 - 2.00  | 50                        | 1.94 | 1.91 - 2.50   | 150                       | 2.31 | 2.39 - 2.79  | 110                       | 2.51 |
| Breast (99-100% lean)                                   | 3.84   | 90                        | 3.84 |   |                           |      | 3.19 - 3.99  | 670                       | 3.84 |
| Rolls (frsh/frz 1 lb.)                                  |  |                           |      |   |                           |      |  |                           |      |