



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/02 thru 05/08.

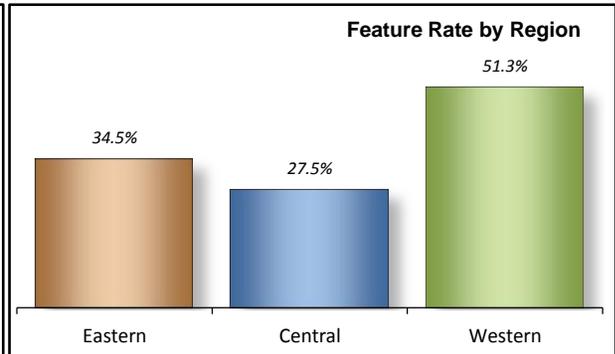
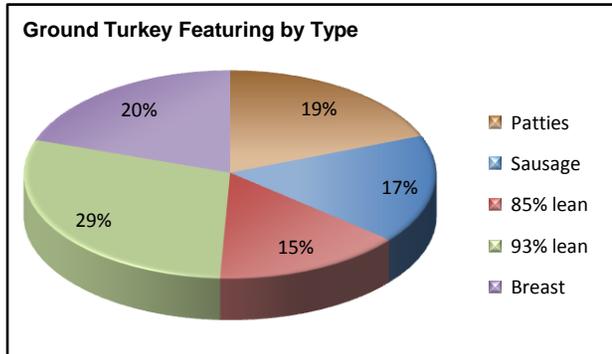
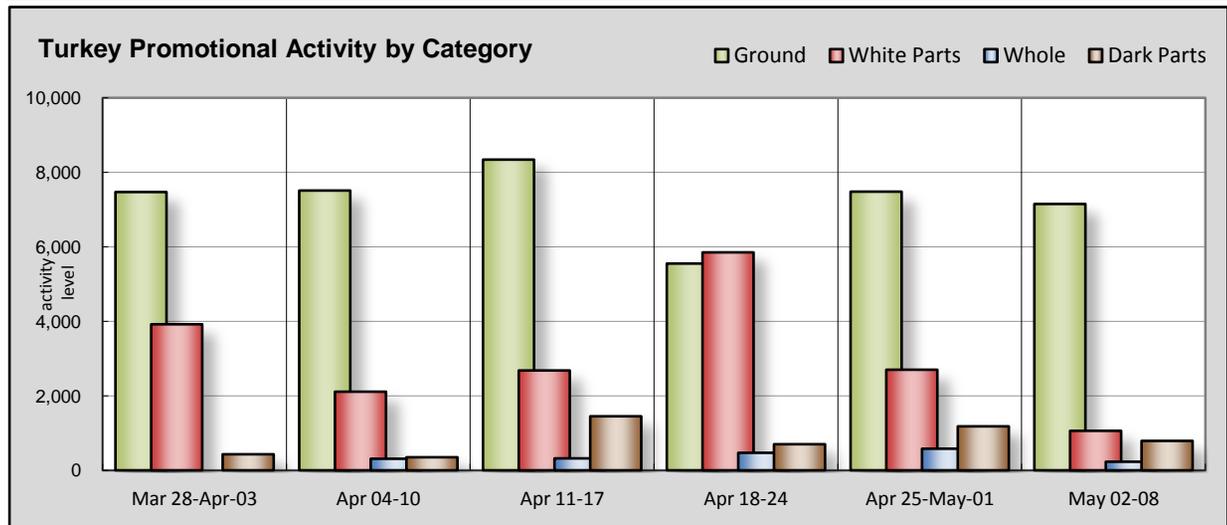
Fri. May 02, 2008

(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/} | 36.3% of 18,000 outlets | | 43.9% of 18,000 outlets | | 46.2% of 17,000 outlets | |
| Special Rate ^{4/} | 2.6% | | 3.9% | | 4.5% | |
| Activity Index ^{2/} | 10,040 | | 13,560 | | 14,530 | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRDS: | | | | | | |
| Fresh - Hens | | | | | | |
| " - Toms | | | | | | |
| Frozen - Hens | 80 | 1.19 | 290 | 0.88 | 370 | 0.96 |
| " - Toms | 150 | 1.03 | 290 | 0.88 | 360 | 0.98 |
| PARTS: | | | | | | |
| Breast: | | | | | | |
| Bone-in, whole | | | | | | |
| Fresh | 130 | 0.99 | 450 | 2.14 | 1,600 | 1.95 |
| Frozen | 420 | 1.56 | 120 | 1.79 | 230 | 1.49 |
| Hotel Style | | | | | | |
| Fresh | | | | | 140 | 1.49 |
| Frozen | | | | | | |
| Split, bone-in | | | | | | |
| Fresh | 140 | 2.69 | | | 880 | 2.29 |
| Rotisserie | 10 | 5.99 | 200 | 7.35 | 670 | 7.16 |
| Boneless, whole | | | 60 | 3.99 | | |
| Cutlets | 250 | 3.94 | 830 | 4.10 | 440 | 4.41 |
| Cutlets, thin sliced | 100 | 4.99 | 710 | 3.97 | 10 | 3.99 |
| Strips | | | 20 | 4.54 | 110 | 4.54 |
| Tenders | 10 | 2.57 | 310 | 3.99 | 520 | 3.73 |
| Marinated Tenders | 150 | 3.81 | 1,250 | 4.01 | 450 | 3.16 |
| Drumsticks | 370 | 1.26 | 510 | 1.40 | 520 | 1.26 |
| Thighs | 20 | 1.35 | 10 | 1.29 | 40 | 1.37 |
| Wings | 370 | 1.26 | 510 | 1.39 | 270 | 1.24 |
| Necks | 10 | 1.39 | 150 | 1.40 | | |
| Smoked Drumsticks | 10 | 2.49 | | | 50 | 1.39 |
| Smoked Wings | 10 | 2.49 | | | 50 | 1.39 |
| Smoked Necks | | | | | | |
| GROUND TURKEY: | 7,150 | 2.87 | 7,480 | 2.75 | 7,400 | 2.65 |
| Patties | 1,370 | 2.92 | 1,290 | 2.93 | 1,480 | 2.81 |
| Sausage | 1,210 | 2.66 | 1,830 | 2.79 | 1,950 | 2.44 |
| 85% lean | 1,050 | 1.76 | 850 | 1.84 | 430 | 1.82 |
| 93% lean | 2,100 | 2.56 | 2,070 | 2.35 | 2,440 | 2.33 |
| Breast | 1,420 | 4.26 | 1,440 | 3.65 | 1,100 | 3.85 |
| Rolls (frsh/frz 1 lb.) | 660 | 1.30 | 370 | 1.13 | 420 | 1.02 |

This Week's Turkey Feature Highlights

Retailers focus on alternative meat proteins this week and offers on turkey items are extremely light. Promotions are most active in the west this week with over 50 percent of the stores promoting turkey, mostly ground turkey. Whole birds are lightly featured at firm prices. Activity on bone-in breast is unchanged from last week, however this week the focus moved from fresh to frozen and prices are lower on both categories. Rotisserie breasts all but disappear, offers on cutlets and tenders are very light, and marinated tenders, normally a popular item, are all but ignored. Fresh drums and wings are available at competitive prices. Other dark parts attract little interest. Ground turkey is widely promoted, especially in the Western region. The weighted average price is higher due to strong prices on 93% lean and ground breast. Offers on sausage retreat, 85% lean is given more ad space, other items are about unchanged from last week.



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.)

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



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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/} | 34.5% of 8,100 sampled outlets 0.7% of stores w/ no-price promotions Activity Index = 4,610 | | | 27.5% of 5,650 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,730 | | | 51.3% of 4,250 sampled outlets 9.7% of stores w/ no-price promotions Activity Index = 3,040 | | |
| | 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 | | | | 1.18 - 1.19 | 80 | 1.19 | | | |
| " - Toms | 0.89 | 80 | 0.89 | 1.19 | 70 | 1.19 | | | |
| PARTS: | | | | | | | | | |
| Breast: | | | | | | | | | |
| Bone-in, whole | | | | | | | | | |
| Fresh | 0.99 | 120 | 0.99 | 0.99 | 10 | 0.99 | | | |
| Frozen | 1.79 - 1.99 | 210 | 1.90 | 0.99 | 140 | 0.99 | 1.69 | 70 | 1.69 |
| Hotel Style | | | | | | | | | |
| Fresh | | | | | | | | | |
| Frozen | | | | | | | | | |
| Split, bone-in | | | | | | | | | |
| Fresh | | | | | | | 2.69 | 140 | 2.69 |
| Rotisserie | | | | 5.99 | 10 | 5.99 | | | |
| Boneless, whole | | | | | | | | | |
| Cutlets | 3.29 - 3.99 | 250 | 3.94 | | | | | | |
| Cutlets, thin sliced | 4.99 | 100 | 4.99 | | | | | | |
| Strips | | | | | | | | | |
| Tenders | | | | 2.57 | 10 | 2.57 | | | |
| Marinated Tenders | 3.19 - 4.05 | 140 | 3.80 | 3.99 | 10 | 3.99 | | | |
| Drumsticks | 1.19 - 1.29 | 360 | 1.25 | 1.39 | 10 | 1.39 | | | |
| Thighs | 1.29 - 1.49 | 20 | 1.35 | | | | | | |
| Wings | 1.19 - 1.29 | 360 | 1.25 | 1.39 | 10 | 1.39 | | | |
| Necks | | | | 1.39 | 10 | 1.39 | | | |
| Smoked Drumsticks | | | | 2.49 | 10 | 2.49 | | | |
| Smoked Wings | | | | 2.49 | 10 | 2.49 | | | |
| Smoked Necks | | | | | | | | | |
| GROUND TURKEY: | | | | | | | | | |
| Patties | 2.49 - 2.99 | 420 | 2.84 | 2.00 - 3.50 | 360 | 2.26 | 2.99 - 3.50 | 590 | 3.38 |
| Sausage | 2.07 - 3.00 | 560 | 2.56 | 1.99 - 2.63 | 60 | 2.45 | 2.46 - 2.87 | 590 | 2.79 |
| 85% lean | 1.33 - 2.00 | 400 | 1.92 | 1.53 - 1.91 | 360 | 1.67 | 1.25 - 2.08 | 290 | 1.67 |
| 93% lean | 1.99 - 3.19 | 940 | 2.36 | 2.31 - 2.80 | 220 | 2.53 | 2.40 - 2.95 | 940 | 2.76 |
| Breast (99-100% lean) | 3.76 - 4.99 | 650 | 3.99 | 4.39 - 4.99 | 350 | 4.62 | 4.39 | 420 | 4.39 |
| Rolls (frsh/frz 1 lb.) | 0.99 - 1.25 | 190 | 1.23 | 1.00 - 2.00 | 450 | 1.31 | 1.50 | 20 | 1.50 |