



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/23 thru 05/29.**

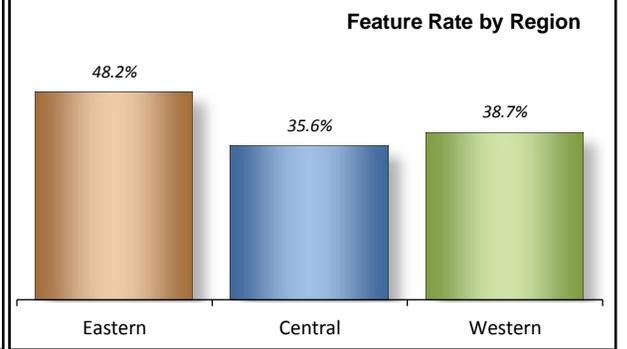
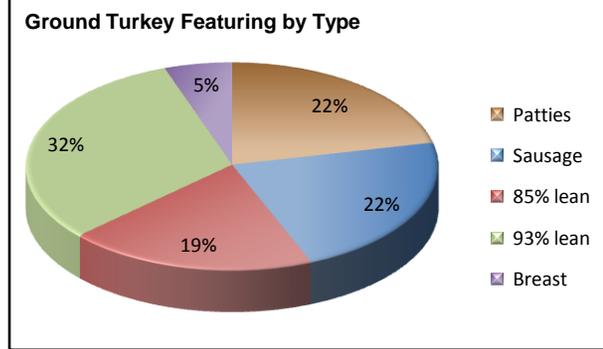
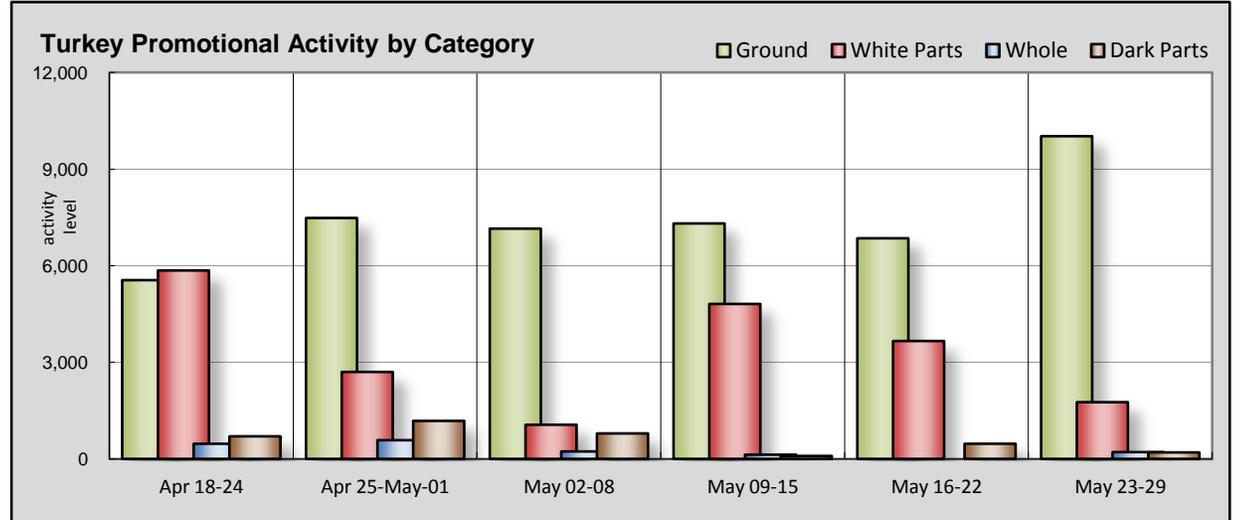
Fri. May 23, 2008

(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                      |                |
| <b>Feature Rate</b> <sup>1/</sup>   | <b>42.0% of 18,000 outlets</b> |                | <b>39.9% of 18,000 outlets</b> |                | <b>41.8% of 17,000 outlets</b> |                |
| <b>Special Rate</b> <sup>4/</sup>   | <b>3.4%</b>                    |                | <b>6.9%</b>                    |                | <b>5.4%</b>                    |                |
| <b>Activity Index</b> <sup>2/</sup> | <b>13,590</b>                  |                | <b>12,060</b>                  |                | <b>11,300</b>                  |                |
| <b>3/</b>                           | <b>Stores</b>                  | <b>Wtd Avg</b> | <b>Stores</b>                  | <b>Wtd Avg</b> | <b>Stores</b>                  | <b>Wtd Avg</b> |
| <b>WHOLE BIRDS:</b>                 |                                |                |                                |                |                                |                |
| Fresh - Hens                        | 50                             | 1.26           |                                |                | 140                            | 1.33           |
| " - Toms                            | 30                             | 1.25           |                                |                | 20                             | 0.99           |
| Frozen - Hens                       | 130                            | 0.89           |                                |                | 90                             | 0.98           |
| " - Toms                            |                                |                |                                |                |                                |                |
| <b>PARTS:</b>                       |                                |                |                                |                |                                |                |
| <b>Breast:</b>                      |                                |                |                                |                |                                |                |
| <b>Bone-in, whole</b>               |                                |                |                                |                |                                |                |
| Fresh                               | 190                            | 2.01           | 190                            | 1.90           | 190                            | 1.97           |
| Frozen                              | 810                            | 1.90           | 200                            | 1.15           | 300                            | 1.72           |
| <b>Hotel Style</b>                  |                                |                |                                |                |                                |                |
| Fresh                               |                                |                | 10                             | 1.89           |                                |                |
| Frozen                              |                                |                |                                |                |                                |                |
| <b>Split, bone-in</b>               |                                |                |                                |                |                                |                |
| Fresh                               |                                |                | 50                             | 2.49           | 600                            | 1.99           |
| Rotisserie                          | 230                            | 8.00           | 130                            | 8.69           | 370                            | 7.13           |
| <b>Boneless, whole</b>              |                                |                |                                |                |                                |                |
|                                     | 50                             | 3.84           | 10                             | 3.99           | 60                             | 3.81           |
| <b>Cutlets</b>                      |                                |                |                                |                |                                |                |
|                                     | 140                            | 4.26           | 1,320                          | 4.37           | 470                            | 4.35           |
| <b>Cutlets, thin sliced</b>         |                                |                |                                |                |                                |                |
|                                     | 210                            | 4.94           | 100                            | 4.99           |                                |                |
| <b>Strips</b>                       |                                |                |                                |                |                                |                |
|                                     |                                |                | 550                            | 4.73           | 10                             | 2.66           |
| <b>Tenders</b>                      |                                |                |                                |                |                                |                |
|                                     | 130                            | 3.19           | 1,100                          | 4.09           | 130                            | 3.99           |
| <b>Marinated Tenders</b>            |                                |                |                                |                |                                |                |
|                                     | 990                            | 4.34           | 510                            | 3.81           | 1,110                          | 3.75           |
| <b>Drumsticks</b>                   |                                |                |                                |                |                                |                |
|                                     |                                |                | 10                             | 1.59           | 80                             | 1.49           |
| <b>Thighs</b>                       |                                |                |                                |                |                                |                |
|                                     |                                |                | 20                             | 1.39           |                                |                |
| <b>Wings</b>                        |                                |                |                                |                |                                |                |
|                                     |                                |                | 10                             | 1.49           | 70                             | 1.51           |
| <b>Necks</b>                        |                                |                |                                |                |                                |                |
|                                     |                                |                | 10                             | 1.59           | 10                             | 1.39           |
| <b>Smoked Drumsticks</b>            | 100                            | 1.49           | 140                            | 1.62           | 10                             | 1.79           |
| <b>Smoked Wings</b>                 | 100                            | 1.49           | 140                            | 1.62           |                                |                |
| <b>Smoked Necks</b>                 |                                |                | 140                            | 1.62           |                                |                |
| <b>GROUND TURKEY:</b>               | <b>10,020</b>                  | <b>2.43</b>    | <b>6,850</b>                   | <b>2.60</b>    | <b>7,580</b>                   | <b>2.52</b>    |
| Patties                             | 2,160                          | 2.73           | 740                            | 2.67           | 2,020                          | 2.47           |
| Sausage                             | 2,230                          | 2.47           | 970                            | 2.49           | 1,590                          | 2.55           |
| 85% lean                            | 1,940                          | 1.99           | 780                            | 1.96           | 1,260                          | 1.99           |
| 93% lean                            | 3,150                          | 2.24           | 2,960                          | 2.11           | 1,940                          | 2.30           |
| Breast                              | 540                            | 3.79           | 1,400                          | 4.02           | 770                            | 4.01           |
| Rolls (frsh/frz 1 lb.)              | 410                            | 1.41           | 570                            | 1.61           | 60                             | 1.99           |

**This Week's Turkey Feature Highlights**

Retail featuring is very active for turkey items destined for the grill as the Memorial Day holiday weekend gets underway, signaling the start of the Summer grilling season. Retailers in the East are the most aggressive in featuring turkey with nearly half of all sampled outlets promoting turkey. A few whole birds are featured this week, primarily in the west where split hens are a popular grilling item. Turkey parts are offered sparingly with breast cuts more common than dark and dominated by features of marinated tenders at higher average ad prices from last week. Ground turkey is actively featured for the holiday weekend with 93% lean leading the way and, if for those that don't wish to make their own patties, patties and sausages are close behind. Memorial Day is a full week earlier this year, giving the consumer more time to enjoy turkey.



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

<sup>1/</sup> **Feature Rate:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. <sup>2/</sup> **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). <sup>3/</sup> **Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. <sup>4/</sup> **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.

Source: USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911

website: <http://www.ams.usda.gov/pymarketnews.htm>



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|                              | <b>EASTERN U.S.</b><br>(CT,DC,DE,FL,GA,MA,MD,ME,<br>NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)  |                        |      | <b>CENTRAL U.S.</b><br>(AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,<br>MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)  |                        |      | <b>WESTERN U.S.</b><br>(AZ,CA,CO,ID,MT,<br>NM,NV,OR,UT,WA,WY)  |                        |      |
|------------------------------|--|------------------------|------|--|------------------------|------|---|------------------------|------|
| Feature Rate <sup>1/</sup>   | 48.2% of 8,100 sampled outlets   |                        |      | 35.6% of 5,650 sampled outlets   |                        |      | 38.7% of 4,250 sampled outlets  |                        |      |
| Special Rate <sup>4/</sup>   | 3.7% of stores w/ no-price promotions  |                        |      | 3.3% of stores w/ no-price promotions  |                        |      | 2.8% of stores w/ no-price promotions   |                        |      |
| Activity Index <sup>2/</sup> | Activity Index = 8,230   |                        |      | Activity Index = 2,240   |                        |      | Activity Index = 2,710  |                        |      |
|                              | Price Range (\$/pound)   | Summary Stores Wtd Avg |      | Price Range (\$/pound)   | Summary Stores Wtd Avg |      | Price Range (\$/pound)  | Summary Stores Wtd Avg |      |
| <b>WHOLE BIRDS:</b>          |  |                        |      |  |                        |      |   |                        |      |
| Fresh - Hens                 |  |                        |      | 1.29   | 20                     | 1.29 | 0.99 - 1.59   | 30                     | 1.25 |
| " - Toms                     |  |                        |      |  |                        |      | 0.99 - 1.59   | 30                     | 1.25 |
| Frozen - Hens                |  |                        |      |  |                        |      | 0.89  | 130                    | 0.89 |
| " - Toms                     |  |                        |      |  |                        |      |   |                        |      |
| <b>PARTS:</b>                |  |                        |      |  |                        |      |   |                        |      |
| <b>Breast:</b>               |  |                        |      |  |                        |      |   |                        |      |
| Bone-in, whole               |  |                        |      |  |                        |      |   |                        |      |
| Fresh                        | 1.19 - 2.99  | 160                    | 2.00 |  |                        |      | 1.69 - 2.59   | 30                     | 2.08 |
| Frozen                       | 1.69 - 1.89  | 440                    | 1.72 | 1.69 - 2.29  | 370                    | 2.11 |   |                        |      |
| <b>Hotel Style</b>           |  |                        |      |  |                        |      |   |                        |      |
| Fresh                        |  |                        |      |  |                        |      |   |                        |      |
| Frozen                       |  |                        |      |  |                        |      |   |                        |      |
| <b>Split, bone-in</b>        |  |                        |      |  |                        |      |   |                        |      |
| Fresh                        |  |                        |      |  |                        |      |   |                        |      |
| Rotisserie                   | 5.99 - 8.99  | 230                    | 8.00 |  |                        |      |   |                        |      |
| Boneless, whole              | 3.49 - 3.99  | 50                     | 3.84 |  |                        |      |   |                        |      |
| Cutlets                      | 3.99 - 4.29  | 140                    | 4.26 |  |                        |      |   |                        |      |
| Cutlets, thin sliced         | 3.99 - 4.99  | 210                    | 4.94 |  |                        |      |   |                        |      |
| Strips                       |  |                        |      |  |                        |      |   |                        |      |
| Tenders                      |  |                        |      |  |                        |      | 3.19  | 130                    | 3.19 |
| Marinated Tenders            | 3.73 - 4.05  | 390                    | 3.81 | 3.73 - 4.79  | 290                    | 4.58 | 4.79  | 310                    | 4.79 |
| Drumsticks                   |  |                        |      |  |                        |      |   |                        |      |
| Thighs                       |  |                        |      |  |                        |      |   |                        |      |
| Wings                        |  |                        |      |  |                        |      |   |                        |      |
| Necks                        |  |                        |      |  |                        |      |   |                        |      |
| Smoked Drumsticks            | 1.49   | 100                    | 1.49 |  |                        |      |   |                        |      |
| Smoked Wings                 | 1.49   | 100                    | 1.49 |  |                        |      |   |                        |      |
| Smoked Necks                 |  |                        |      |  |                        |      |   |                        |      |
| <b>GROUND TURKEY:</b>        |  |                        |      |  |                        |      |   |                        |      |
| Patties                      | 1.33 - 3.00  | 1,210                  | 2.58 | 1.99 - 2.50  | 100                    | 2.19 | 2.99 - 3.00   | 850                    | 2.99 |
| Sausage                      | 1.59 - 2.99  | 1,750                  | 2.41 | 1.59 - 2.70  | 210                    | 2.44 | 2.86 - 2.87   | 270                    | 2.87 |
| 85% lean                     | 1.79 - 3.99  | 1,580                  | 1.99 | 1.65 - 1.99  | 360                    | 1.96 |   |                        |      |
| 93% lean                     | 1.69 - 3.19  | 1,690                  | 2.21 | 1.49 - 2.50  | 660                    | 2.01 | 2.39 - 2.87   | 800                    | 2.47 |
| Breast (99-100% lean)        | 3.30 - 4.61  | 180                    | 4.31 | 3.73   | 230                    | 3.73 | 3.19  | 130                    | 3.19 |
| Rolls (frsh/frz 1 lb.)       | 1.50   | 120                    | 1.50 | 0.88 - 1.39  | 290                    | 1.38 |   |                        |      |