



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/15 thru 08/21.

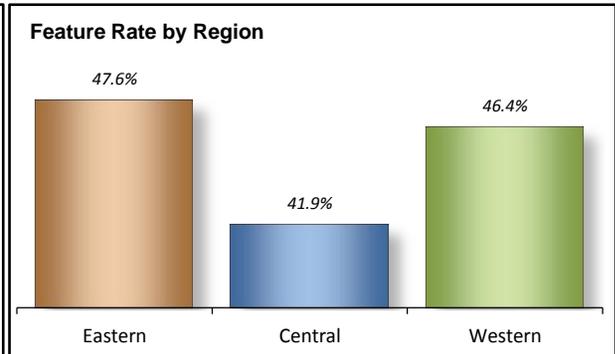
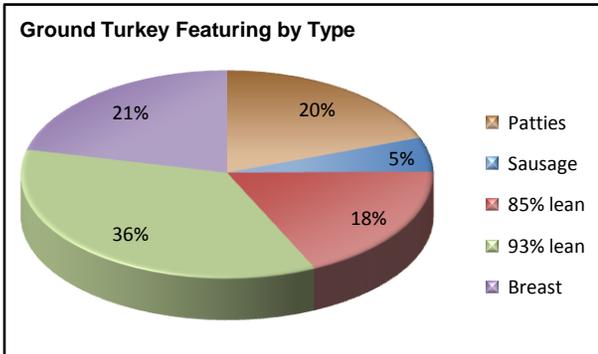
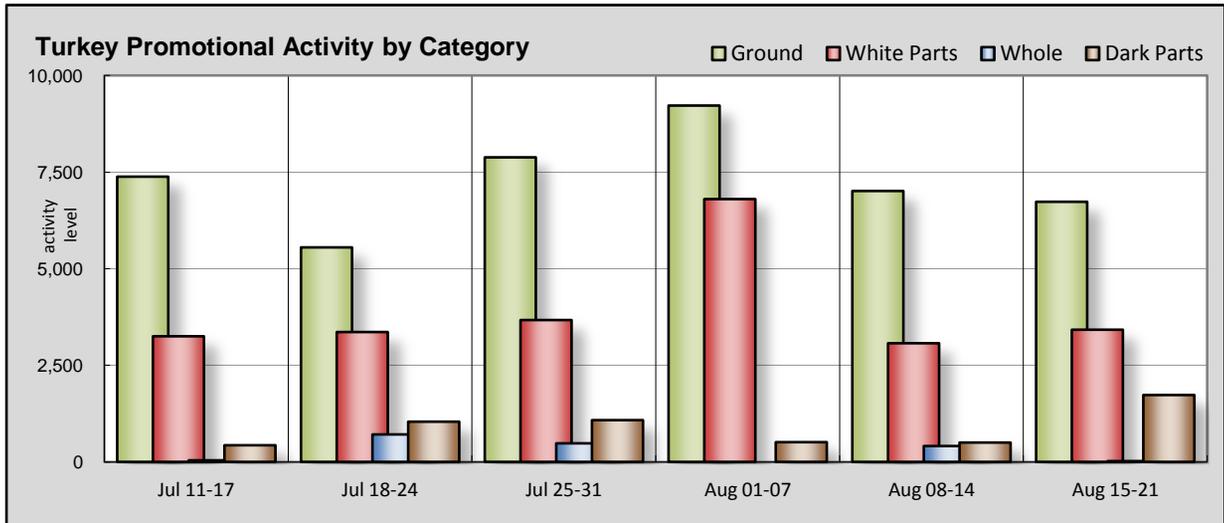
Fri. Aug 15, 2008

(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/}	45.5% of 18,000 outlets		39.5% of 18,000 outlets		56.5% of 17,000 outlets	
Special Rate ^{4/}	7.2%		4.6%		7.4%	
Activity Index ^{2/}	13,160		12,180		13,840	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens			310	1.49	130	1.49
" - Toms						
Frozen - Hens	20	1.34	100	0.99		
" - Toms					20	0.89
PARTS:						
Breast:						
Bone-in, whole						
Fresh	60	2.41	120	1.97	10	2.49
Frozen	660	1.73	520	1.70	1,310	1.92
Hotel Style						
Fresh			10	2.49	130	1.79
Frozen	120	1.99				
Split, bone-in						
Fresh	40	2.99			30	2.69
Rotisserie	1,040	7.62	590	7.78	600	7.38
Boneless, whole	20	4.49	260	3.68	40	3.99
Cutlets	970	4.21	640	4.06	520	4.09
Cutlets, thin sliced	80	3.99	130	4.77		
Strips	20	3.17	250	3.56	140	4.99
Tenders	410	4.26	550	3.91	860	3.69
Marinated Tenders	980	3.88	1,140	3.98	1,530	4.11
GROUND TURKEY:	6,730	2.82	7,010	2.61	7,330	2.58
Patties	1,310	2.62	800	2.80	1,220	2.48
Sausage	360	2.60	2,230	2.66	1,200	2.52
85% lean	1,230	1.93	790	1.94	1,120	1.91
93% lean	2,390	2.50	2,650	2.49	2,320	2.26
Breast	1,440	4.34	540	3.76	1,470	3.73
Rolls (frsh/frz 1 lb.)	280	1.49	50	2.01	410	1.01

This Week's Turkey Feature Highlights

Retail promotions rebound for mid-month sales and "no price" specials are more prevalent this week. A few frozen hens are offered, otherwise whole birds are out of the picture this week. Limited offers on fresh bone-in breasts are at sharply higher trending prices, frozen is more available and prices are higher. Rotisserie breasts are active this week and a better value than last week. Cutlets and marinated tenders are well represented. Prices are stronger on cutlets, lower on marinated tenders. Dark parts are very popular and offered in every region. Fresh drums and wings are plentiful, and the only item missing was smoked necks. Prices on all dark parts are sure to catch the consumers' attention. Ground turkey slows due to very limited offers on sausage this week. Active offers on ground breast at much higher prices pulled the overall weighted average price up, even with lower prices on most items. "Back to School" specials will compete with food this week in some parts of the country.



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/}	47.6% of 8,100 sampled outlets 7.9% of stores w/ no-price promotions Activity Index = 7,400			41.9% of 5,650 sampled outlets 9.4% of stores w/ no-price promotions Activity Index = 2,400			46.4% of 4,250 sampled outlets 2.8% of stores w/ no-price promotions Activity Index = 3,080		
	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				1.19	10	1.19	1.49	10	1.49
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.99	10	1.99	2.49	10	2.49	2.49	40	2.49
Frozen	0.99 - 1.99	500	1.74	1.39 - 2.19	160	1.70			
Hotel Style									
Fresh									
Frozen	1.99	120	1.99						
Split, bone-in									
Fresh				2.99	40	2.99			
Rotisserie	5.99 - 8.99	880	7.71	6.99 - 7.99	160	7.10			
Boneless, whole	4.39 - 4.59	20	4.49						
Cutlets	3.99 - 4.99	760	4.18	2.99 - 3.99	80	3.26	4.54 - 4.99	130	4.94
Cutlets, thin sliced	3.99	80	3.99						
Strips				3.17	20	3.17			
Tenders	4.49	130	4.49	3.99	20	3.99	3.99 - 4.39	260	4.16
Marinated Tenders	3.73 - 4.26	860	4.06	2.39 - 3.73	120	2.59			
Drumsticks	1.29 - 1.79	220	1.37	1.39	20	1.39	1.49	520	1.49
Thighs	1.29 - 1.89	30	1.55	1.39	20	1.39	1.49	130	1.49
Wings	1.29 - 1.79	210	1.40	1.39	20	1.39	1.49	520	1.49
Necks	1.59	10	1.59	1.39	10	1.39			
Smoked Drumsticks	1.40	10	1.40						
Smoked Wings	1.40	10	1.40						
Smoked Necks									
GROUND TURKEY:									
Patties	1.79 - 3.00	1,110	2.62	2.19 - 2.50	160	2.46	2.79 - 3.99	40	3.13
Sausage	2.53	30	2.53	2.04 - 2.69	200	2.44	2.78 - 2.87	130	2.86
85% lean	1.46 - 2.39	500	1.86	1.54 - 2.08	450	1.95	1.99 - 2.08	280	2.03
93% lean	1.53 - 2.99	1,060	2.50	1.99 - 2.99	730	2.46	2.39 - 3.99	600	2.57
Breast (99-100% lean)	2.99 - 5.19	850	4.26	3.99 - 5.19	170	4.91	3.19 - 4.79	420	4.27
Rolls (frsh/frz 1 lb.)				1.00 - 2.00	250	1.51	1.25 - 1.39	30	1.32