



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/19 thru 09/25.

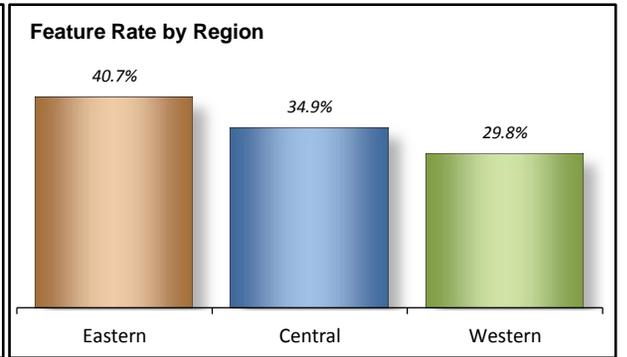
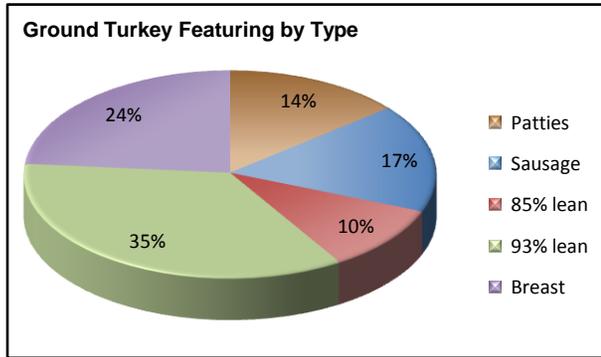
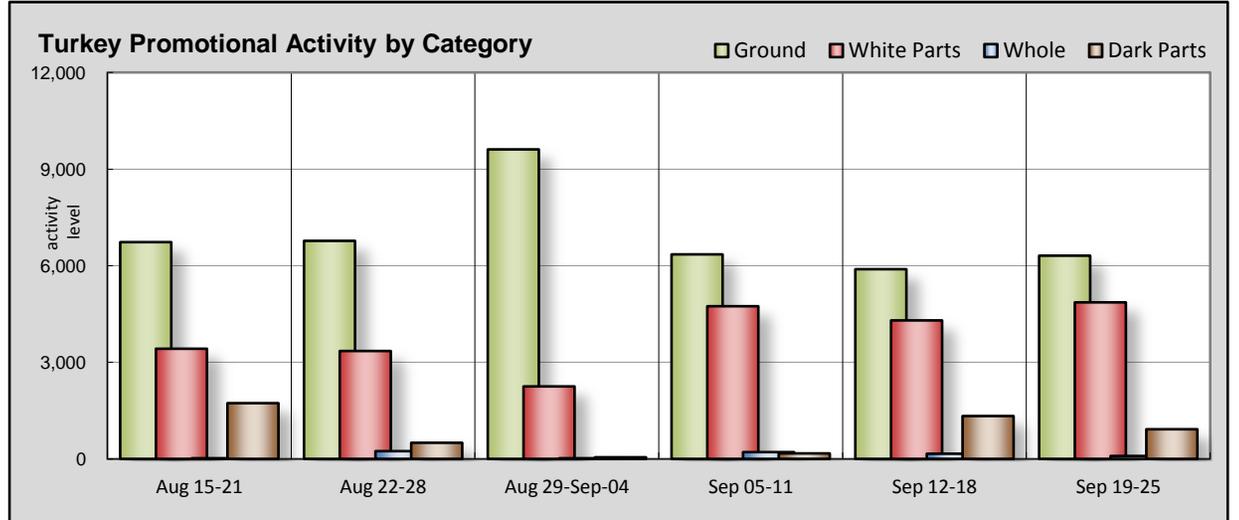
Fri. Sep 19, 2008

(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 | | 44.1% of 18,000 outlets | | 52.5% of 17,000 outlets | |
| Special Rate ^{4/} | 2.5% | | 5.5% | | 6.0% | |
| Activity Index ^{2/} | 13,330 | | 12,450 | | 12,640 | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg | Stores | Wtd Avg |
| WHOLE BIRDS: | | | | | | |
| Fresh - Hens | 40 | 1.49 | 60 | 1.17 | 470 | 1.28 |
| " - Toms | 30 | 1.49 | | | | |
| Frozen - Hens | 20 | 1.49 | 90 | 0.98 | 10 | 0.99 |
| " - Toms | | | 10 | 0.89 | | |
| PARTS: | | | | | | |
| Breast: | | | | | | |
| Bone-in, whole | | | | | | |
| Fresh | 340 | 2.62 | 450 | 2.53 | 740 | 1.85 |
| Frozen | 1,130 | 1.40 | 1,590 | 1.60 | 660 | 1.76 |
| Hotel Style | | | | | | |
| Fresh | 140 | 2.05 | | | 20 | 1.99 |
| Frozen | 10 | 1.59 | | | | |
| Split, bone-in | | | | | | |
| Fresh | | | | | | |
| Rotisserie | 430 | 7.89 | 950 | 7.83 | 1,240 | 7.09 |
| Boneless, whole | | | | | | |
| | 10 | 4.49 | 20 | 4.36 | | |
| Cutlets | | | | | | |
| | 1,450 | 4.54 | 700 | 4.40 | 860 | 4.47 |
| Cutlets, thin sliced | | | | | | |
| | 120 | 4.99 | 250 | 4.99 | | |
| Strips | | | | | | |
| | 130 | 3.63 | 20 | 3.59 | 30 | 4.54 |
| Tenders | | | | | | |
| | 1,100 | 4.15 | 320 | 4.76 | 950 | 4.32 |
| Marinated Tenders | | | | | | |
| | 1,120 | 3.63 | 500 | 3.93 | 220 | 3.00 |
| DRUMSTICKS | | | | | | |
| | 300 | 1.58 | 350 | 1.44 | 230 | 1.29 |
| THIGHS | | | | | | |
| | 70 | 1.99 | | | 50 | 1.48 |
| WINGS | | | | | | |
| | 300 | 1.65 | 340 | 1.43 | 190 | 1.29 |
| NECKS | | | | | | |
| | 80 | 1.65 | 150 | 1.21 | 10 | 1.39 |
| SMOKED | | | | | | |
| Drumsticks | | | | | | |
| | 70 | 1.72 | 180 | 1.73 | 40 | 1.90 |
| Wings | | | | | | |
| | 70 | 1.72 | 160 | 1.68 | | |
| Necks | | | | | | |
| | 30 | 1.83 | 150 | 1.69 | | |
| GROUND TURKEY: | | | | | | |
| | 6,310 | 2.91 | 5,890 | 3.16 | 6,410 | 2.64 |
| Patties | 890 | 3.03 | 420 | 2.74 | 1,760 | 2.52 |
| Sausage | 1,070 | 2.91 | 1,170 | 2.52 | 1,570 | 2.60 |
| 85% lean | 640 | 1.86 | 550 | 2.07 | 1,070 | 1.87 |
| 93% lean | 2,220 | 2.60 | 1,730 | 2.63 | 870 | 2.58 |
| Breast | 1,490 | 3.78 | 2,020 | 4.36 | 1,140 | 3.63 |
| Rolls (frsh/frz 1 lb.) | 30 | 1.49 | 270 | 1.53 | 510 | 1.19 |

This Week's Turkey Feature Highlights

Fewer stores offer turkey this week, but many of those stores promote multiple turkey items. Several stores are offering kosher turkeys for the upcoming Rosh Hashanah holiday. Interest in fresh and frozen whole turkeys continues seasonally light. Bone-in breasts promotions retreat; prices edge higher on fresh but are sharply lower on frozen. Offers on rotisserie breasts continue to slow. Fresh white meat cuts are popular. Cutlets, tenders and marinated tenders are heavily promoted this week. Prices are stronger on cutlets while tenders and marinated tenders are offered at prices that are sure to grab the consumer's interest. Dark parts are not as active as last week, but still popular. Prices are stronger on all dark parts except smoked drums, which were close to unchanged. Grinds recover from last week and the weighted average price is sharply lower due to fewer ads on ground breast. Prices on patties and sausage are sharply higher. Ground breast and 85% lean are attractively priced.



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.



USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/19 thru 09/25.

Fri. Sep 19, 2008

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

| | 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/} | 40.7% of 8,100 sampled outlets 2.2% of stores w/ no-price promotions Activity Index = 7,680 | | | 34.9% of 5,650 sampled outlets 0.3% of stores w/ no-price promotions Activity Index = 2,840 | | | 29.8% of 4,250 sampled outlets 5.9% of stores w/ no-price promotions Activity Index = 2,780 | | |
| | 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 | 1.49 | 40 | 1.49 | | | | | | |
| " - Toms | 1.49 | 30 | 1.49 | | | | | | |
| Frozen - Hens | | | | 1.49 | 10 | 1.49 | 1.49 | 10 | 1.49 |
| " - Toms | | | | | | | | | |
| PARTS: | | | | | | | | | |
| Breast: | | | | | | | | | |
| Bone-in, whole | | | | | | | | | |
| Fresh | 2.29 - 2.99 | 310 | 2.65 | 2.29 - 2.48 | 30 | 2.33 | | | |
| Frozen | 0.99 - 1.99 | 510 | 1.43 | 0.99 - 1.99 | 560 | 1.30 | 1.99 | 60 | 1.99 |
| Hotel Style | | | | | | | | | |
| Fresh | 1.99 - 2.49 | 140 | 2.05 | | | | | | |
| Frozen | 1.59 | 10 | 1.59 | | | | | | |
| Split, bone-in | | | | | | | | | |
| Fresh | | | | | | | | | |
| Rotisserie | 5.99 - 8.99 | 360 | 8.12 | 5.98 - 7.99 | 70 | 6.76 | | | |
| Boneless, whole | 4.49 | 10 | 4.49 | | | | | | |
| Cutlets | 3.99 - 4.99 | 710 | 4.81 | | | | 3.63 - 4.54 | 740 | 4.29 |
| Cutlets, thin sliced | 4.99 | 120 | 4.99 | | | | | | |
| Strips | | | | | | | 3.63 | 130 | 3.63 |
| Tenders | 4.99 | 340 | 4.99 | 3.99 | 20 | 3.99 | 3.19 - 3.99 | 740 | 3.77 |
| Marinated Tenders | 2.93 - 4.26 | 840 | 3.79 | 2.66 - 3.72 | 280 | 3.14 | | | |
| Drumsticks | 1.49 - 1.69 | 260 | 1.60 | 1.39 - 1.49 | 40 | 1.47 | | | |
| Thighs | 1.99 | 70 | 1.99 | | | | | | |
| Wings | 1.49 - 1.99 | 260 | 1.68 | 1.39 - 1.49 | 40 | 1.47 | | | |
| Necks | 1.69 | 70 | 1.69 | 1.39 | 10 | 1.39 | | | |
| Smoked Drumsticks | 1.59 - 1.85 | 50 | 1.66 | 1.69 - 1.99 | 20 | 1.87 | | | |
| Smoked Wings | 1.59 - 1.85 | 50 | 1.66 | 1.69 - 1.99 | 20 | 1.87 | | | |
| Smoked Necks | 1.69 - 1.85 | 20 | 1.75 | 1.99 | 10 | 1.99 | | | |
| GROUND TURKEY: | | | | | | | | | |
| Patties | 2.50 - 3.00 | 640 | 2.90 | 2.50 - 3.50 | 250 | 3.36 | | | |
| Sausage | 2.40 - 3.50 | 720 | 2.75 | 2.46 - 3.50 | 320 | 3.26 | 2.99 | 30 | 2.99 |
| 85% lean | 1.39 - 2.30 | 400 | 1.84 | 1.48 - 2.30 | 80 | 1.79 | 1.50 - 1.99 | 160 | 1.94 |
| 93% lean | 2.00 - 2.76 | 1,090 | 2.41 | 1.66 - 3.50 | 830 | 2.72 | 2.39 - 3.19 | 300 | 2.93 |
| Breast (99-100% lean) | 2.99 - 3.99 | 630 | 3.77 | 2.87 - 3.98 | 250 | 3.28 | 3.99 | 610 | 3.99 |
| Rolls (frsh/frz 1 lb.) | | | | 1.49 | 20 | 1.49 | 1.49 | 10 | 1.49 |