

USDA Weekly Retail Turkey Feature Activity

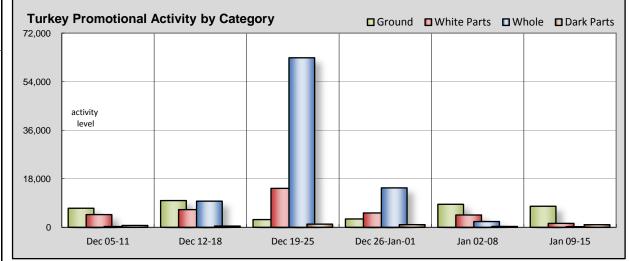
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/09 thru 01/15.

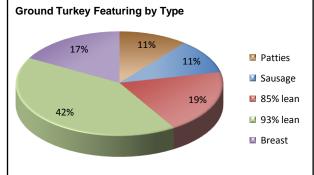
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

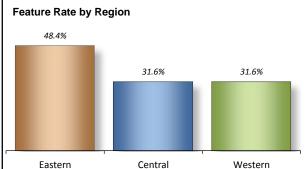
| NATIONAL SUMMARY | | | | | | | | | | | | |
|------------------------|------------------------------------|---------|---------|-----------|-------------------------------------|---------|--|--|--|--|--|--|
| | THIS | WEEK | LAST | WEEK | LAST YEAR | | | | | | | |
| Feature Rate 1/ | 39.1% of 18,600 outlets 4.5% | | 46.6% c | of 18,600 | 53.5% of 17,000 outlets 15.3% | | | | | | | |
| reature Rate | | | out | lets | | | | | | | | |
| Special Rate 4/ | | | 3. | 9% | | | | | | | | |
| Activity Index 2/ | 11,290 | | 17, | 140 | 11,220 | | | | | | | |
| 3/ | Stores | Wtd Avg | Stores | Wtd Avg | Stores | Wtd Avg | | | | | | |
| WHOLE BIRDS: | | | | | | | | | | | | |
| Fresh - Hens | | | 440 | 1.59 | | | | | | | | |
| " - Toms | | | 440 | 1.58 | | | | | | | | |
| Frozen - Hens | 120 | 1.38 | 560 | 1.14 | 230 | 1.06 | | | | | | |
| " - Toms | 110 | 1.38 | 690 | 1.07 | | | | | | | | |
| PARTS: | | | | | | | | | | | | |
| Breast: | | | | | | | | | | | | |
| Bone-in, whole | | | | | | | | | | | | |
| Fresh | 30 | | 170 | | 120 | | | | | | | |
| Frozen | 560 | 1.76 | 1,370 | 1.91 | 230 | 1.73 | | | | | | |
| Hotel Style | | | | | | | | | | | | |
| Fresh | 40 | 1.50 | | | | | | | | | | |
| Frozen | | | | | | | | | | | | |
| Split, bone-in | | | | | | | | | | | | |
| Fresh | 10 | 2.89 | 20 | 1.89 | | | | | | | | |
| Rotisserie | 190 | 7.95 | 360 | 8.43 | 910 | 6.87 | | | | | | |
| Boneless, whole | 20 | 4.69 | 170 | 4.14 | | | | | | | | |
| Cutlets | 440 | 4.84 | 1,140 | 5.00 | 880 | 4.18 | | | | | | |
| Cutlets, thin sliced | 40 | 4.56 | 120 | 4.96 | | | | | | | | |
| Strips | 10 | 4.99 | 430 | 5.93 | 370 | 4.08 | | | | | | |
| Tenders | 110 | 4.21 | 780 | 4.37 | 1,140 | 3.88 | | | | | | |
| Marinated Tenders | 350 | 4.25 | 750 | 3.96 | 180 | 3.79 | | | | | | |
| Drumsticks | 120 | 1.13 | 60 | 1.65 | 560 | 1.31 | | | | | | |
| Thighs | 40 | 1.67 | 40 | 2.01 | 150 | 1.28 | | | | | | |
| Wings | 80 | 1.03 | 90 | 1.53 | 540 | 1.31 | | | | | | |
| Necks | | | | | 90 | 1.19 | | | | | | |
| Smoked Drumsticks | 280 | 1.62 | 50 | 1.56 | | | | | | | | |
| Smoked Wings | 230 | 1.56 | 60 | 1.57 | 10 | 1.59 | | | | | | |
| Smoked Necks | 210 | 1.47 | 10 | 1.99 | | | | | | | | |
| GROUND TURKEY: | 7,800 | 2.75 | 8,530 | 3.06 | 5,550 | 2.32 | | | | | | |
| Patties | 850 | 2.97 | 200 | 2.49 | 530 | 2.74 | | | | | | |
| Sausage | 840 | 2.97 | 2,140 | 2.65 | 1,270 | 2.42 | | | | | | |
| 85% lean | 1,530 | 1.95 | 1,730 | 2.09 | 920 | 1.79 | | | | | | |
| 93% lean | 3,250 | 2.44 | 1,600 | 2.65 | 2,150 | 1.89 | | | | | | |
| Breast | 1,330 | 4.13 | 2,860 | 4.22 | 680 | 3.87 | | | | | | |
| Rolls (frsh/frz 1 lb.) | 500 | 1.42 | 860 | 1.24 | 260 1.26 | | | | | | | |

This Week's Turkey Feature Highlights

Fewer stores offer turkey this week, and the stores with turkey ads have a limited selection. Whole turkeys are practically absent from store circulars. Promotions on bone-in breasts continue to slow and prices trend lower. Fewer ads feature breast cuts, cutlets and marinated tenders are the most common choices. Average prices are lower on cutlets, higher on marinated tenders, and prices are mixed on the balance of items. Dark parts are more active. Smoked parts are the favorite selection. Ground turkey slowed from last week, but is still widely available. The 85%, 93% and ground breast are at the most attractive prices, sausage and patties trend higher.







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 <u>any</u> 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. (e.g., buy 1, ge

Fri. Jan 09, 2009

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| | EASTERN U.S. | | | CENTRAL U.S. | | Him | WESTERN U.S. | | A | |
|--------------------------|--|---------------------|---------|--|---------|---------|--|--------|---------|--|
| | (CT,DC,DE,FL,GA,MA,MD,N | IE, | | (AL,AR,IA,IL,IN,KS,KY,LA | ,MI,MN, | | (AZ,CA,CO,ID,MT, | | MA | |
| NC,NH,NJ,NY,PA,RI,SC,VA, | | VT,WV) | | MO,MS,ND,NE, OH, OK,SD,TN,TX,WI) | | 4 Jan | NM,NV,OR,UT,WA,WY) | | | |
| Feature Rate 1/ | 48.4% of 8,400 sampled outlets 3.3% of stores w/ no-price promotions | | | 31.6% of 5,900 sampled outlets 5.0% of stores w/ no-price promotions | | | 31.6% of 4,300 sampled outlets 6.0% of stores w/ no-price promotions | | | |
| Special Rate 4/ | | | | | | | | | | |
| Activity Index 2/ | Activity Index = 6,920 | | | Activity Index = 1,970 | | | Activity Index = 1,900 | | | |
| | Price Range | Price Range Summary | | Price Range Summary | | nary | Price Range Su | | ımmary | |
| | (\$/pound) | Stores | Wtd Avg | (\$/pound) | Stores | Wtd Avg | (\$/pound) | Stores | Wtd Avg | |
| WHOLE BIRDS: | | | | | | | | | | |
| Fresh - Hens | | | | | | | | | | |
| " - Toms | | | | | | | | | | |
| Frozen - Hens | 1.39 | 10 | 1.39 | | | | 0.99 - 1.59 | 110 | 1.38 | |
| " - Toms | | | | | | | 0.99 - 1.59 | 110 | 1.38 | |
| PARTS: | | | | | | | | | | |
| Breast: | | | | | | | | | | |
| Bone-in, whole | | | | | | | | | | |
| Fresh | 2.99 | 20 | 2.99 | 1.89 | 10 | | | | | |
| Frozen | 0.99 - 2.49 | 330 | 1.79 | 1.18 - 1.99 | 200 | 1.73 | 1.69 | 30 | 1.69 | |
| Hotel Style | | | | | | | | | | |
| Fresh | 0.99 - 1.89 | 40 | 1.50 | | | | | | | |
| Frozen | | | | | | | | | | |
| Split, bone-in | | | | | | | | | | |
| Fresh | 2.89 | 10 | 2.89 | | | | | | | |
| Rotisserie | 7.99 | 20 | 7.99 | 6.99 - 7.99 | 170 | 7.95 | | | | |
| Boneless, whole | 4.69 | 20 | 4.69 | | | | | | | |
| Cutlets | 2.59 - 4.99 | 260 | 4.86 | 3.63 - 4.99 | 170 | 4.81 | 4.99 | 10 | 4.99 | |
| Cutlets, thin sliced | 4.49 - 4.59 | 40 | 4.56 | | | | | | | |
| Strips | | | | | | | 4.99 | 10 | 4.99 | |
| Tenders | | | | 3.27 - 3.99 | 70 | 3.76 | 4.99 | 40 | 4.99 | |
| Marinated Tenders | 3.73 - 4.26 | 320 | 4.15 | | | | 5.33 | 30 | 5.33 | |
| Drumsticks | 0.99 - 1.49 | 110 | 1.12 | 1.29 | 10 | 1.29 | | | | |
| Thighs | 1.79 | 30 | 1.79 | 1.29 | 10 | 1.29 | | | | |
| Wings | 0.99 | 70 | 0.99 | 1.29 | 10 | 1.29 | | | | |
| Necks | | | | | | | | | | |
| Smoked Drumsticks | 1.49 - 1.99 | 230 | 1.56 | 1.88 | 50 | 1.88 | | | | |
| Smoked Wings | 1.49 - 1.99 | 230 | 1.56 | | | | | | | |
| Smoked Necks | 1.39 - 1.99 | 210 | 1.47 | | | | | | | |
| GROUND TURKEY: | | | | | | | | | | |
| Patties | 2.39 - 3.50 | 170 | 3.31 | 2.00 - 2.99 | 250 | 2.11 | 3.00 - 3.49 | 430 | 3.34 | |
| Sausage | 2.29 - 3.99 | 640 | 2.99 | 2.99 - 3.99 | 60 | 3.72 | 2.46 - 3.99 | 140 | 2.55 | |
| 85% lean | 1.58 - 2.15 | 1,030 | 1.99 | 1.49 - 2.08 | 420 | 1.76 | 2.29 - 2.40 | 80 | 2.39 | |
| 93% lean | 2.00 - 2.79 | 2,260 | 2.36 | 1.98 - 3.19 | 300 | 2.59 | 2.39 - 2.79 | 690 | 2.61 | |
| Breast (99-100% lean) | 3.84 - 4.79 | 870 | 4.01 | 2.99 - 4.99 | 240 | 4.39 | 3.99 - 4.99 | 220 | 4.31 | |
| Rolls (frsh/frz 1 lb.) | 1.49 - 2.00 | 210 | 1.77 | 0.68 - 1.49 | 270 | 1.14 | 1.59 | 20 | 1.59 | |