



**USDA Weekly Retail Turkey Feature Activity**  
**Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/21 thru 11/27.**

Fri. Nov 21, 2008

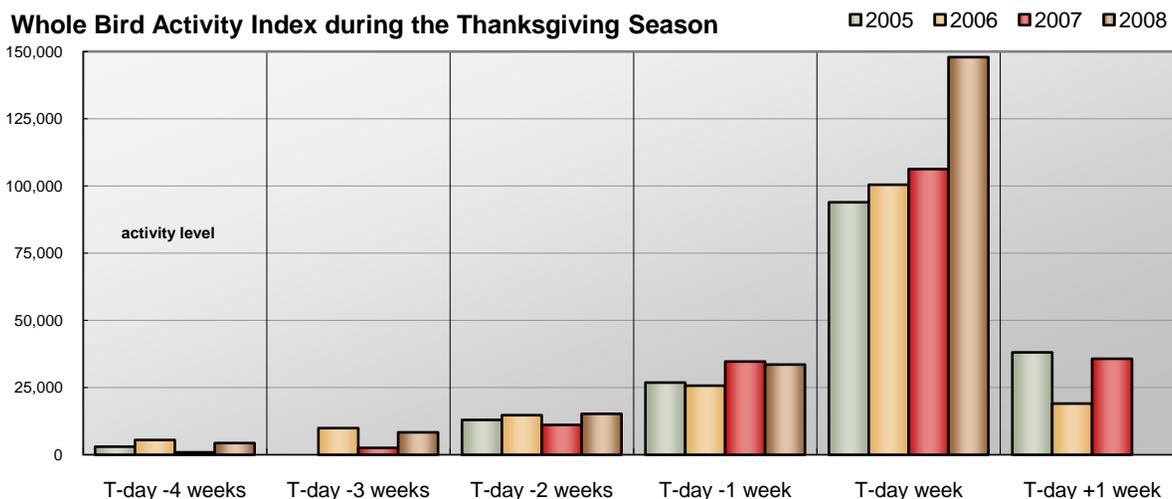
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

| NATIONAL SUMMARY                    |                                |                |                                |                |                                |                |
|-------------------------------------|--------------------------------|----------------|--------------------------------|----------------|--------------------------------|----------------|
|                                     | THIS WEEK                      |                | LAST WEEK                      |                | LAST YEAR                      |                |
| <b>Feature Rate</b> <sup>1/</sup>   | <b>94.7% of 18,000 outlets</b> |                | <b>63.2% of 18,000 outlets</b> |                | <b>43.5% of 17,000 outlets</b> |                |
| <b>Special Rate</b> <sup>4/</sup>   | <b>8.2%</b>                    |                | <b>9.1%</b>                    |                | <b>6.6%</b>                    |                |
| <b>Activity Index</b> <sup>2/</sup> | <b>179,220</b>                 |                | <b>45,980</b>                  |                | <b>44,250</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                        | 34,100                         | 1.43           | 3,020                          | 1.36           | 9,750                          | 1.36           |
| " - Toms                            | 32,180                         | 1.44           | 3,010                          | 1.36           | 9,720                          | 1.37           |
| Frozen - Hens                       | 42,510                         | 0.82           | 13,790                         | 0.79           | 8,010                          | 0.96           |
| " - Toms                            | 39,090                         | 0.82           | 13,740                         | 0.79           | 8,240                          | 0.96           |
| <b>PARTS:</b>                       |                                |                |                                |                |                                |                |
| <b>Breast:</b>                      |                                |                |                                |                |                                |                |
| <b>Bone-in, whole</b>               |                                |                |                                |                |                                |                |
| Fresh                               | 10,160                         | 2.48           | 1,890                          | 2.32           | 2,630                          | 1.89           |
| Frozen                              | 15,530                         | 1.87           | 3,240                          | 2.13           | 2,090                          | 1.74           |
| <b>Hotel Style</b>                  |                                |                |                                |                |                                |                |
| Fresh                               | 60                             | 2.89           | 20                             | 1.99           |                                |                |
| Frozen                              |                                |                |                                |                |                                |                |
| <b>Split, bone-in</b>               |                                |                |                                |                |                                |                |
| Fresh                               | 20                             | 2.69           |                                |                |                                |                |
| Rotisserie                          | 2,050                          | 7.94           | 590                            | 6.65           | 690                            | 7.57           |
| <b>Boneless, whole</b>              |                                |                |                                |                |                                |                |
|                                     | 40                             | 4.49           | 120                            | 4.56           |                                |                |
| <b>Cutlets</b>                      |                                |                |                                |                |                                |                |
|                                     | 30                             | 4.79           | 520                            | 4.79           | 20                             | 3.99           |
| <b>Cutlets, thin sliced</b>         |                                |                |                                |                |                                |                |
|                                     |                                |                | 120                            | 4.94           | 30                             | 3.99           |
| <b>Strips</b>                       |                                |                |                                |                |                                |                |
|                                     |                                |                |                                |                |                                |                |
| <b>Tenders</b>                      |                                |                |                                |                |                                |                |
|                                     |                                |                | 700                            | 4.48           |                                |                |
| <b>Marinated Tenders</b>            |                                |                |                                |                |                                |                |
|                                     | 100                            | 3.41           | 170                            | 4.08           | 380                            | 3.91           |
| <b>Drumsticks</b>                   |                                |                |                                |                |                                |                |
|                                     | 310                            | 1.47           |                                |                | 90                             | 0.99           |
| <b>Thighs</b>                       |                                |                |                                |                |                                |                |
|                                     | 250                            | 1.44           |                                |                |                                |                |
| <b>Wings</b>                        |                                |                |                                |                |                                |                |
|                                     | 240                            | 1.38           |                                |                | 90                             | 0.99           |
| <b>Necks</b>                        |                                |                |                                |                |                                |                |
|                                     | 20                             | 1.31           |                                |                |                                |                |
| <b>Smoked Drumsticks</b>            |                                |                |                                |                |                                |                |
|                                     | 140                            | 1.89           | 40                             | 1.99           | 140                            | 1.89           |
| <b>Smoked Wings</b>                 |                                |                |                                |                |                                |                |
|                                     | 150                            | 1.89           |                                |                |                                |                |
| <b>Smoked Necks</b>                 |                                |                |                                |                |                                |                |
|                                     |                                |                |                                |                |                                |                |
| <b>GROUND TURKEY:</b>               |                                |                |                                |                |                                |                |
|                                     | <b>2,240</b>                   | <b>2.67</b>    | <b>4,310</b>                   | <b>2.87</b>    | <b>2,370</b>                   | <b>2.31</b>    |
| Patties                             | 210                            | 2.67           | 80                             | 3.14           | 170                            | 2.54           |
| Sausage                             | 1,150                          | 2.50           | 1,310                          | 2.52           | 430                            | 2.42           |
| 85% lean                            | 10                             | 2.30           | 520                            | 2.00           | 60                             | 1.89           |
| 93% lean                            | 690                            | 2.49           | 1,350                          | 2.47           | 1,680                          | 2.25           |
| Breast                              | 180                            | 4.44           | 1,050                          | 4.25           | 30                             | 3.99           |
| Rolls (frsh/frz 1 lb.)              |                                |                | 700                            | 1.40           |                                |                |

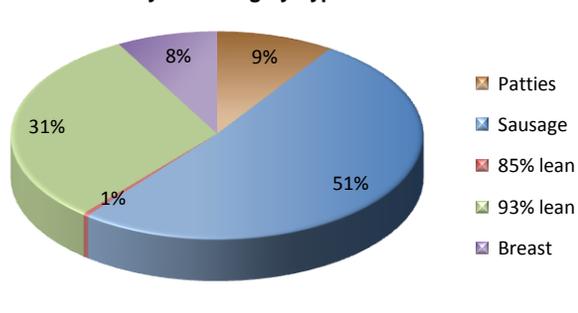
**This Week's Turkey Feature Highlights**

Stores are going all out for the week leading into Thanksgiving with many stores extending promotions though the end of the month. By this time last year, Thanksgiving was over and ads were winding down. Fresh and frozen whole body turkeys are more available compared to the week of Thanksgiving a year ago. Prices are stronger on fresh this year, frozen prices averaged less due to some very aggressive promotions in many areas. Fresh and frozen bone-in breast are widely available, however, prices are sharply higher. Rotisserie breasts are popular again this year as it is a smaller turkey breast with no cooking required. Dark parts and turkey sausage are seasonally popular. The balance of items are light, as is to be expected this time of year.

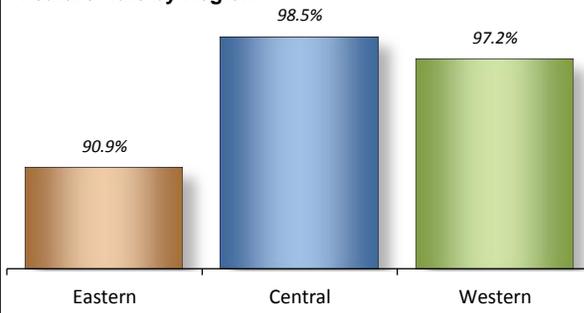
**Whole Bird Activity Index during the Thanksgiving Season**



**Ground Turkey Featuring by Type**



**Feature Rate by Region**



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.

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,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,MO,MS,ND,NE,OH,OK,SD,TN,TX,WI)  |                              |      | <b>WESTERN U.S.</b><br>(AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)  |                              |      |
|---|--|------------------------------|------|--|------------------------------|------|---|------------------------------|------|
| <b>Feature Rate</b> <sup>1/</sup><br><b>Special Rate</b> <sup>4/</sup><br><b>Activity Index</b> <sup>2/</sup> | <b>90.9% of 8,100 sampled outlets</b><br><b>5.1% of stores w/ no-price promotions</b><br><b>Activity Index = 85,830</b>  |                              |      | <b>98.5% of 5,650 sampled outlets</b><br><b>11.3% of stores w/ no-price promotions</b><br><b>Activity Index = 55,390</b>   |                              |      | <b>97.2% of 4,250 sampled outlets</b><br><b>10.0% of stores w/ no-price promotions</b><br><b>Activity Index = 38,000</b>                      |                              |      |
|   | Price Range (\$/pound)   | Summary<br>Stores    Wtd Avg |      | Price Range (\$/pound)   | Summary<br>Stores    Wtd Avg |      | Price Range (\$/pound)  | Summary<br>Stores    Wtd Avg |      |
| <b>WHOLE BIRDS:</b>   |  |                              |      |  |                              |      |   |                              |      |
| Fresh - Hens  | 0.88 - 1.99  | 17,640                       | 1.46 | 0.88 - 1.99  | 7,090                        | 1.45 | 0.57 - 2.19   | 9,370                        | 1.34 |
| " - Toms  | 0.88 - 1.99  | 19,670                       | 1.45 | 0.88 - 1.99  | 7,290                        | 1.46 | 0.57 - 2.19   | 5,220                        | 1.39 |
| Frozen - Hens   | 0.29 - 1.79  | 16,840                       | 0.85 | 0.37 - 1.49  | 14,490                       | 0.87 | 0.35 - 1.59   | 11,180                       | 0.69 |
| " - Toms  | 0.29 - 1.79  | 16,450                       | 0.84 | 0.37 - 1.69  | 15,960                       | 0.87 | 0.23 - 1.59   | 6,680                        | 0.65 |
| <b>PARTS:</b>   |  |                              |      |  |                              |      |   |                              |      |
| <b>Breast:</b>  |  |                              |      |  |                              |      |   |                              |      |
| <b>Bone-in, whole</b>   |  |                              |      |  |                              |      |   |                              |      |
| Fresh   | 1.79 - 2.99  | 5,640                        | 2.37 | 1.79 - 2.99  | 2,880                        | 2.49 | 2.49 - 3.29   | 1,640                        | 2.82 |
| Frozen  | 1.19 - 2.99  | 6,290                        | 1.82 | 1.39 - 2.79  | 6,050                        | 1.83 | 1.39 - 2.29   | 3,190                        | 2.05 |
| <b>Hotel Style</b>  |  |                              |      |  |                              |      |   |                              |      |
| Fresh   | 2.89   | 60                           | 2.89 |  |                              |      |   |                              |      |
| Frozen  |  |                              |      |  |                              |      |   |                              |      |
| <b>Split, bone-in</b>   |  |                              |      |  |                              |      |   |                              |      |
| Fresh   | 2.69   | 20                           | 2.69 |  |                              |      |   |                              |      |
| Rotisserie  | 6.99 - 8.99  | 1,030                        | 8.03 | 5.99 - 7.99  | 380                          | 7.57 | 7.99 - 8.99   | 640                          | 8.01 |
| <b>Boneless, whole</b>  | 4.49   | 40                           | 4.49 |  |                              |      |   |                              |      |
| <b>Cutlets</b>  | 4.79   | 30                           | 4.79 |  |                              |      |   |                              |      |
| <b>Cutlets, thin sliced</b>   |  |                              |      |  |                              |      |   |                              |      |
| <b>Strips</b>   |  |                              |      |  |                              |      |   |                              |      |
| <b>Tenders</b>  |  |                              |      |  |                              |      |   |                              |      |
| Marinated Tenders   | 3.73   | 40                           | 3.73 | 3.19   | 60                           | 3.19 |   |                              |      |
| <b>Drumsticks</b>   | 1.69 - 1.79  | 70                           | 1.77 | 1.19 - 1.49  | 240                          | 1.38 |   |                              |      |
| <b>Thighs</b>   | 1.99   | 20                           | 1.99 | 1.39   | 230                          | 1.39 |   |                              |      |
| <b>Wings</b>  |  |                              |      | 1.19 - 1.49  | 240                          | 1.38 |   |                              |      |
| <b>Necks</b>  |  |                              |      | 1.19 - 1.49  | 20                           | 1.31 |   |                              |      |
| Smoked Drumsticks   | 1.89   | 130                          | 1.89 | 1.89   | 10                           | 1.89 |   |                              |      |
| Smoked Wings  | 1.67 - 1.89  | 140                          | 1.87 | 2.19   | 10                           | 2.19 |   |                              |      |
| Smoked Necks  |  |                              |      |  |                              |      |   |                              |      |
| <b>GROUND TURKEY:</b>   |  |                              |      |  |                              |      |   |                              |      |
| Patties   | 2.50 - 3.00  | 210                          | 2.67 |  |                              |      |   |                              |      |
| Sausage   | 2.04 - 2.99  | 1,050                        | 2.50 | 2.46 - 2.94  | 100                          | 2.53 |   |                              |      |
| 85% lean  | 2.30   | 10                           | 2.30 |  |                              |      |   |                              |      |
| 93% lean  | 2.29 - 2.76  | 430                          | 2.40 | 2.16 - 2.87  | 180                          | 2.40 | 3.19  | 80                           | 3.19 |
| Breast (99-100% lean)   | 4.49   | 20                           | 4.49 | 4.39 - 4.49  | 160                          | 4.43 |   |                              |      |
| Rolls (frsh/frz 1 lb.)  |  |                              |      |  |                              |      |   |                              |      |

A full breakdown of supermarket promotions featuring turkey and other poultry for Thanksgiving will be available on November 26, 2008 on our website at:

[www.ams.usda.gov/pymarketnews.htm](http://www.ams.usda.gov/pymarketnews.htm)

"Poultry and Egg Market Reports"  
"Holiday Advertising"

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, roaster chickens, capons, cornish hens, gizzards, livers, ducklings, geese, baking hens, shell eggs, egg nog, and liquid eggs.

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**This and all of our other holiday promotions reports are also available in spreadsheet format. Please contact us at the number/e-mail address below to receive the spreadsheet files.**

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USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911 - [PYMN@usda.gov](mailto:PYMN@usda.gov)