



Thanksgiving Marketing of Whole Turkeys – 2018

Thanksgiving is the primary marketing period for whole body turkeys. During the 2018 Thanksgiving marketing period, U.S. supermarkets featured a variety of whole body turkeys to consumers in a range of types and forms sure to please even the most discerning shopper.

Whole turkeys can be found in the retail case either in fresh, frozen, smoked, or brined forms. Smoked offerings are typically prepared in advance and frozen for added shelf-life while brined birds are sold in fresh form and are normally specialty types. Smoked turkeys continue to rise in popularity and are particularly favored in the Southeast which led the nation with 34% of smoked offerings, 17% from Florida alone. The South Central states came in at 21% of offerings with Texas accounting for 13% of total U.S. offerings. Combined, these two regions accounted for 55% of U.S. offerings of smoked turkeys during the holiday season.

	Conventional			Specialty		
	2018	2017	2016	2018	2017	2016
overall	79%	82%	87%	21%	18%	13%
<i>fresh</i>	29%	32%	37%	65%	64%	64%
<i>frozen</i>	65%	63%	60%	29%	26%	30%
<i>brined</i>	--	--	3.2%	4%	5%	1%
<i>smoked</i>	5%	4%	0%	1%	4%	5%

\$/lbs.	Fresh			Frozen		
	2018	2017	2016	2018	2017	2016
conventional	1.60	1.67	1.77	0.97	1.04	1.09
antibiotic-free	2.26	2.28	2.61	1.38	1.80	2.26

During Thanksgiving 2018, 79% of features were for conventional birds, down 3% from 2017. Turkeys raised in conventional production systems continue to comprise the majority of offerings but their feature share continues to decline as production of antibiotic-free (ABF) and organic turkeys increases. Production of turkeys raised without the use of antibiotics is a rapidly growing trend in the U.S. as

producers look to satisfy a growing consumer awareness and demand. Preliminary estimates for 2018 indicate production of ABF turkey is up 5% over 2017 while organic production exceeds 2017 by one percent. This growth is reflected in the increased marketing share of ABF and organic turkeys at Thanksgiving 2018. Offerings of all specialty types increased 3% in retail advertising (8% since 2016) led by a 2% rise in ABF and a one percent rise in organic offerings. Since 2016, ABF offerings have doubled in feature share and organic nearly as much. Another trend reflected in retail feature activity is the growth of free-range organic production, up one percent over 2017. Offerings of kosher birds was up a half percent over 2017. Kosher birds are typically featured for Hanukkah and not necessarily for Thanksgiving. In 2018, Hanukkah began within two weeks of Thanksgiving, resulting in increased featuring compared to 2017 when Hanukkah coincided more closely with Christmas.

As ABF whole turkeys become more available in the marketplace, the average ad price on feature by grocers has declined and the availability of frozen birds has risen. The average ad price for fresh conventional turkeys at Thanksgiving, including

	2018	2017	2016	2018	2017	2016
Conventional	79.3%	82.4%	87.5%	Specialty Breakdown		
Specialty	20.7%	17.6%	12.5%			
<i>antibiotic-free</i>	12.3%	10.5%	6.4%	59.3%	59.6%	51.4%
<i>organic</i>	4.3%	3.7%	2.5%	23.5%	20.7%	19.9%
<i>kosher</i>	1.4%	1.0%	1.5%	6.5%	5.6%	12.0%
<i>free range</i>	1.1%	1.9%	1.2%	5.4%	10.5%	9.7%
<i>heritage</i>	0.7%	0.4%	0.4%	3.6%	2.0%	3.1%
<i>non-GMO</i>	0.3%	0.1%	0.3%	1.3%	0.7%	2.1%
<i>organic heritage</i>	0.1%	0.1%	0.2%	0.3%	0.7%	1.7%
<i>halal</i>	0.01%	0.02%	0.02%	0.04%	0.09%	0.16%

all terms and conditions, was \$1.60 in 2018, down 4% from 2017 while the average ad price for frozen conventional birds was \$0.97, down 6% from 2017. A similar comparison of ad prices for ABF whole turkeys shows average ad prices for fresh birds slightly lower at \$2.26 while average ad prices for frozen ABF birds were down 23% from 2017 at \$1.38. This follows a 20% ad price decline in 2017 compared to 2016.

Information for this report is derived from data reported in the [Feature Advertising by U.S. Supermarkets Meat and Poultry](#) report series.

