

Thanksgiving Marketing of Whole Turkeys – 2017

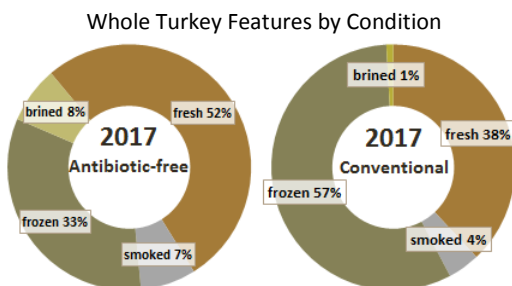
During the recent 2017 Thanksgiving marketing period, U.S. supermarkets featured a variety of whole body turkeys to consumers. Of these, just over 82 percent were of turkeys raised in conventional production systems with the remaining 18 percent were of turkeys produced in non-conventional systems (specialty). This reflects a 5 percent increase in the share of specialty whole bird marketings over the Thanksgiving 2016 marketing season, due primarily to an increase in the availability of non-organic turkeys raised without the use of antibiotics (use of antibiotics is not allowed in organic production systems).

Thanksgiving Featuring of Whole Body Turkeys by Type 2017 v. 2016 by percentage of features				
	2017	2016	2017	2016
Conventional	82.4%	87.5%	Specialty Breakdown	
Specialty	17.6%	12.5%		
<i>antibiotic-free</i>	10.5%	6.4%	59.6%	51.4%
<i>organic</i>	3.7%	2.5%	20.7%	19.9%
<i>kosher</i>	1.0%	1.5%	5.6%	12.0%
<i>free range</i>	1.9%	1.2%	10.5%	9.7%
<i>heritage</i>	0.4%	0.4%	2.0%	3.1%
<i>non-GMO</i>	0.1%	0.3%	0.7%	2.1%
<i>organic heritage</i>	0.1%	0.2%	0.7%	1.7%
<i>halal</i>	0.02%	0.02%	0.1%	0.2%

Production of turkeys raised without the use of antibiotics is a rapidly growing trend in the production of all types of poultry as producers look to satisfy a growing consumer awareness and demand. In 2017, marketing of non-organic antibiotic-free turkeys accounted for over 10 percent of all whole bird offerings at Thanksgiving, up 4 percent from 2016. This increase was driven by an 80 percent increase in the number of stores offering antibiotic-free turkeys to their customers over Thanksgiving 2016. Within the specialty category, featuring of antibiotic-free whole turkeys expanded by 8 percent over 2016, reflecting the growing importance of the category. Offerings of organically-raised turkeys were up just over one percent in 2017 while those for free-range turkeys, typically raised without antibiotics, increased nearly one percent.

As antibiotic-free whole turkeys become more available in the marketplace, the average ad price on feature by grocers has declined. The average ad price for fresh conventional turkeys at Thanksgiving, including all terms and conditions, was \$1.67 in 2017, down 6 percent from 2016 while the average ad price for frozen birds was \$1.04 per pound, down 5 percent from 2016. However, a similar comparison of ad prices for antibiotic-free whole turkeys shows a 12 percent decline for fresh birds and a 20 percent decline for frozen. As further evidence of the “normalization” of antibiotic-free turkeys in the marketplace, the use of antibiotic-free birds as “loss-leaders” increased from 3 percent of all ads for fresh or frozen antibiotic-free birds in 2016 to 8 percent in 2017.

Average Feature Sale Price at Thanksgiving						
	Fresh			Frozen		
	2017	2016	change	2017	2016	change
conventional	1.67	1.77	-6%	1.04	1.09	-5%
antibiotic-free	2.28	2.61	-12%	1.80	2.26	-20%



As with conventional birds, antibiotic-free turkeys are offered either in fresh, frozen, smoked, or brined forms. Just over half of all features of antibiotic-free birds at Thanksgiving 2017 were for fresh birds as compared to 38 percent for conventional birds while one third of features for antibiotic-free turkeys were for frozen birds compared to 57 percent for conventional turkeys. In some parts of the country, smoked turkeys have become a popular holiday option, a trend that is crossing over to antibiotic-free birds which saw a 6 percent increase in features in 2017 compared to a one percent rise in offerings of smoked conventional birds from 2016. Brining, where birds are soaked in a seasoned salt and water solution, has typically

been reserved for fresh specialty turkeys. Supermarket features during Thanksgiving 2017 for brined conventional turkeys remained less than one percent of all features of those types but brined offerings of antibiotic-free turkeys accounted for 8% of features for those types, up one percent from 2016.

All indications are that turkeys sold well during the Thanksgiving season and stocks cleared at a healthy pace. As a result, fewer features of whole birds are being seen for the Christmas season and ad prices are unchanged with many grocers placing limits on the number of birds to be purchased at the sale price.

Information for this report is derived from data collected during the holiday marketing period and reported in the [Feature Advertising by U.S. Supermarkets Meat and Poultry](#) reports, available in open data format at no cost upon request to: Michael.sheats@ams.usda.gov. Similar data for beef, chicken, turkey, pork, and lamb is available upon request.

