

## Lamb Marketing - Christmas/Hanukkah 2017

Christmas/Hanukkah is the second most significant marketing period of the year for lamb, just behind the Easter/Passover season. Among many consumers, lamb is a popular centerpiece of holiday celebrations and grocery retailers feature an increased volume and selection of lamb cuts to satisfy this demand. Lamb legs, in bone-in and boneless forms, are by far the most popular offering followed by racks of lamb, often frenched or shaped into "crowns", perfect as the centerpiece for the holiday dinner table. Loin and rib chops also see an increased marketing share during this period as alternatives to the more traditional legs and racks. Shoulder chops, while not marketed as "centerpiece" cuts, also see increased feature activity during the holidays, carrying into the start of the new year when they are popular offerings during the cold winter months.

Feature Share by Primal	
leg	57%
rack	23%
loin	10%
shoulder	9%
ground	0.6%
breast	0.1%

Feature Share by Origin	
Australia	41%
not identified	33%
domestic	24%
New Zealand	1.2%
Iceland	0.5%

Unlike most other popular meat and poultry proteins, imported lamb plays a significant role in the U.S. market throughout the year, particularly during key demand periods. In 2017, the combined volume of domestic lamb production and of imported lamb was equally divided (51 percent imports/49 percent domestic). During the 2017 Christmas/Hanukkah marketing season, imported lamb accounted for nearly two-thirds of feature share. As reported in the [Feature Advertising by U.S. Supermarkets Meat, Poultry, and Shell Eggs for Christmas/Hanukkah 2017](#) report, during the holiday season, domestic lamb offerings accounted for 24 percent of retail feature activity while imported lamb made up 43 percent of feature share. At that time, the origin of the lamb featured in 33 percent of store ads could not be determined from the advertisement. If the product in the 33 percent of ads where origin was not identified in store ads followed the same distribution as product with known origin, the share of imported lamb advertised by supermarkets during the holiday season could be estimated to be 64 percent.

Lamb products from a variety of production system were also marketed to consumers during the holiday season. Lamb from conventional production systems led all types with 43 percent of ad share followed closely by those raised in and advertised as free of antibiotics with 41 percent. Lamb marketed as "grass-fed" made up 13 percent of store features, with organic offerings at 3 percent. While grass-fed and antibiotic-free labels are often used in conjunction, they are not interchangeable. For the purposes of the special holiday report from which the data for this insight was gathered, the primary claim made in the advertisement took precedent in the reporting. Therefore, a certain percentage of product labeled as antibiotic-free could be assumed to also be grass-fed and vice versa.

Feature Share by Production Type	
conventional	43%
antibiotic-free	41%
grass-fed	13%
organic	3%

Top Lamb Markets by Retail Feature Activity				
region	rank	activity <sup>1</sup>	top market	activity
Northeast	1	2.3	DC	3.0
Southeast	6	0.4	VA	1.2
Midwest	4	0.7	WI	1.4
South Central	5	0.5	AZ	1.0
Southwest	3	1.0	CA	1.1
Northwest	2	1.3	WA	1.7

1 activity = the ratio of lamb offers per store surveyed  
 NE - CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT  
 SE - AL, FL, GA, KY, MS, NC, SC, TN, VA, WV  
 MW - IA, IL, IN, MI, MN, ND, NE, OH, SD, WI  
 SC - AR, AZ, CO, KS, LA, MO, NM, OK, TX, UT  
 SW - CA, HI, NV; NW - AK, ID, MT, OR, WA, WY

The Northeast was the most active market for lamb during the holiday season, outpacing the second-place Northwest by nearly two-to-one based on the number of offers per stores surveyed. The District of Columbia had the highest ratio of lamb offers to surveyed stores in the nation, followed closely by Massachusetts, Connecticut, and New York. In the Northwest, Washington State was the most active market for lamb followed by Oregon. The Southwest, led by California, was the third largest market for lamb during the December holidays. The Southeast, despite a strong showing in Virginia, lagged all regions in lamb marketing. Wisconsin and Illinois made a strong showing in the Midwest but not enough to lift the region and Arizona stood alone in the South Central as regional marketers focused on competing meat proteins to lure their customers. *(based on a survey of 32,400 U.S. grocery stores.)*

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](mailto:Michael.sheats@ams.usda.gov). Data for beef, chicken, turkey, pork, and lamb is available upon request.

