

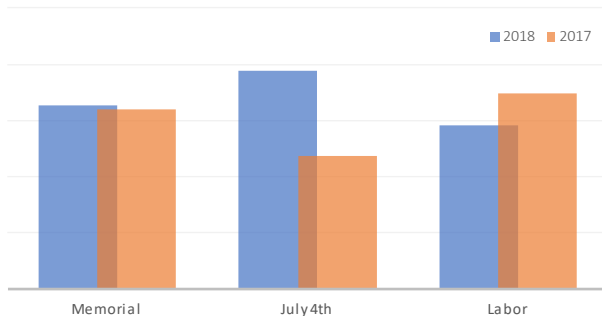
Summer Lamb Chop Marketing

Summer is an active marketing period for a variety of meat cuts suited for the backyard grill including beef steaks and grinds, pork chops and sausages, chicken cuts, and ground turkey. While lamb chops enjoy less grill space than other types, they still command a loyal following and are seeing increasing popularity among grill masters of all ability. Traditionally, retail marketing of lamb focuses on the Easter and Christmas seasons when consumer demand for lamb is at its peak, particularly in the form of legs and racks. While lamb chops also see increased demand during these holidays, as well as for Valentine's and Mother's Days, they enjoy much broader exposure throughout the marketing year and retailers are seeing increasing consumer interest in lamb chops for summer grilling.

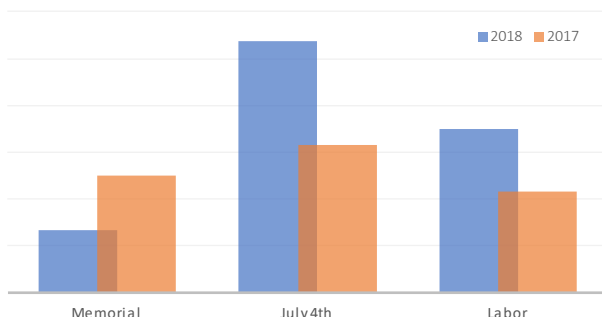
The most common lamb chops sold at retail are loin, shoulder blade, shoulder round bone (arm), and rib. Rib chops offer a smaller portion size and normally are priced more per pound (74% more on average in 2017). Retail featuring of rib chops is less consistent through the year and are popular during the big lamb demand periods. Lamb loin chops, (aka "baby porterhouse"), tend to receive more consistent retail featuring throughout the year than other lamb chops although shoulder blade chops are not far behind. In 2017, featuring of loin chops outpaced that for blade and round bone shoulder chops combined with 56% ad share, up from 54% ad share in 2016. In 2018, through mid-October, loin chops hold 50% of ad share but this is expected to rise as loin ad frequency normally outpaces shoulder chop ad pace by 3 to 1 through the last quarter of the year.

Shoulder chops, particularly blade chops, were favored over their round bone counterparts 85% to 15% in retail circulars during the summer months in 2018 and at an average ad price 13% less than round bone chops and 40% less than the average ad price for loin chops. Blade chops are typically the least expensive lamb chop and are increasing in popularity, up 12% in retail feature activity in Summer 2018 over 2017. Round bone (arm) chops are less commonly featured in retail ads and, in Summer 2018, were featured 18% less than in Summer 2017 as they lose share to their less expensive blade bone counterparts.

Loin Chops - Summer Retail Featuring



Shoulder Chops - Summer Retail Featuring



In 2018, through mid-October, 40% of retail lamb loin chop marketings took place during the summer grilling season (May through Labor Day), up 4% from the same period in 2017. During the same period, 45% of retail lamb shoulder chop marketings occurred, up one percent from 2017. During the big 3 summer holidays, Memorial, Independence, and Labor Days, lamb chops are seeing increased retail promotional activity with 2018 levels up 18% over 2017, led by an 11% increase in loin chop ads and a 30% rise in features for shoulder chops. In 2018, loin and shoulder lamb chops enjoyed their most active retail featuring at July 4th with 44% of feature share, followed by Labor Day with 31% and Memorial Day with 25%. This 44% share was the result of a 66% increase from 2017 in combined loin and shoulder chop promotion over the July 4th holiday. In 2018, loin chops commanded 62% of ad space during the summer holidays, down 4% in share from the 2017 season as shoulder chops saw increased promotion in 2018. Average ad prices during the summer holidays for both loin and shoulder chops were up 2 percent from 2017.

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

