

Holiday Ham Marketing

Consumers can find ham in their local retail meat case throughout the year in a variety of forms including bone-in or boneless; whole, half, or quartered; spiral-cut or uncut; or as ham steaks. However, marketing of ham is concentrated each year around the three big holiday seasons (Easter, Thanksgiving, and Christmas; (Big 3)). In 2018, most ham marketing occurred during the Christmas season with Thanksgiving and Easter following in that order. Spiral-cut ham, whole and half, is the most popular form, commanding 32% of ham marketings in 2018. Spiral-cut bone-in hams are most associated with the holiday seasons with 85% of annual marketings in 2018 occurring during the Big 3 with a third of the remaining 15% marketed in January-February, likely stocks unsold during the prior Christmas season. Spiral-cut hams are most marketed during the Christmas season with 30% of their 2018 marketings occurring at that time.

2018 Ham Marketing Share by Form

spiral cut	32.0%
portions	24.6%
steak	17.8%
boneless	17.6%
whole bn-in	8.0%

Portion hams, whole hams from which a center slice has been removed leaving the butt and the shank portions, normally spiral-cut, was the second most commonly marketed ham form in 2018 with 25% of ham marketings. This form also relies heavily on holiday sales with 75% of 2018 marketings occurring during the Big 3. The remaining 25% are marketed fairly regularly through the rest of the year. Shank portions were marketed more commonly than butt portions by a 70-30% rate in 2018 and are usually priced slightly less than butts. The center slices that are removed when ham portions are created are marketed as "ham steaks", most often in bone-in form. This is a popular item, particularly at Easter when smaller meals are often preferred. In 2018, ham steaks accounted for 18% of ham marketings. Unlike other forms that depend heavily on holiday demand, ham steaks are more of an everyday item with business during the Big 3 only accounting for 18% of annual marketings of this form.

Non-sliced bone-in hams (known as traditional hams), whole and half, accounting for only 8% of annual ham marketings, are heavily dependent on holiday business with 75% of 2018 marketing occurring during the Big 3. In 2018, these hams enjoyed spot marketing at various times during the non-holiday calendar including in January and May (likely to move supplies unsold from the prior Christmas and Easter) and in September and October as cooler weather arrives and retailers squeeze in a couple of promotions ahead of Thanksgiving. Boneless hams accounted for 18% of ham marketings in 2018 with 64% occurring during the Big 3. Boneless hams are marketed in whole, half, or quarter ham forms and may be spiral-cut but are most often not. This is a popular form of ham and actually outpaces ham portions at Easter.

Easter Ham Marketing - 2019 v. 2018

	2019	2018
bone-in spiral cut.....	71.2%	62.0%
whole	23.0%	23.3%
half	16.1%	15.7%
shank portion	18.6%	14.6%
butt portion	13.4%	8.4%
bone-in/semi-bnls; non-spiral cut....	7.5%	10.0%
whole	4.4%	4.5%
half	3.0%	5.5%
boneless.....	17.5%	24.6%
whole	7.1%	9.7%
half	5.8%	7.8%
quarter	4.7%	7.1%
other.....	3.8%	3.5%
ham steak, bone-in	3.4%	3.1%
country ham	0.2%	0.1%
picnic	0.3%	0.2%

During the recent Easter 2019 season, bone-in spiral-cut hams led all marketings, with whole hams having the largest share of the category. The share of bone-in spiral-cut hams, at 71% of all ham marketings, was a 9% increase over 2018. The average advertised price for spiral-cut bone-in hams was 4-5% lower than in 2018. Offerings of butt portion hams contributed most to the increase with 5% more being marketed in 2019 over 2018. Average ad prices were higher in 2019 for portion hams, up 9% for butts and 7% for shanks. The increased share of bone-in, spiral-cut hams resulted from a decline in the share of boneless ham marketings, down nearly 7% in share from 2018 with all sizes seeing reduced activity. Ad pricing for boneless hams in 2019 were down for all forms – ranging from 1% lower for halves to 10% lower for quarters with the whole boneless ham average ad price down 4%. Traditional hams also saw a decline in marketing share, particularly in half form which contributed most of the 2.5% overall decline.

Data Sources: USDA AMS Agricultural Analytics

