

## How Sausage Gets Marketed

Fresh pork sausage is a popular item throughout the year but especially during the summer months for backyard grilling. When a simple hot dog will not do, a pork sausage link is the perfect answer. Whether it be bratwurst or Italian style (distinguished by the seasonings used), fresh pork sausages (aka dinner sausages) can commonly be found in tray packs of 5, 3.8-ounce sausages in a variety of flavors sure to please the pickiest of backyard grillers. While pork sausages get their first big marketing boost of the year in February (Super Bowl), it is only with the arrival of summer with Memorial Day that they come into their own. In 2017, 40 percent of supermarket promotional activity for pork sausage occurred between Memorial and Labor Days. Italian pork sausages commanded 60 percent of this promotion with bratwurst at 40 percent. In 2017, supermarket featuring of Italian sausage peaked during the Super Bowl with bratwurst hitting its high point during the Labor Day weekend and extending into the start of the Autumn football season (football appears to be a common theme).

While retailers feature pork sausages under a wide range of brand names, most commonly they feature processor brands. In addition, some of the larger chains offer sausages co-packed under their private label and, to a lesser extent, some grocery distributors also have product put up under their own label. Many stores do not identify a specific brand in their ads as offerings may vary by store location. This allows them some flexibility in procuring enough product to support their sales efforts as they do not limit their ads to a specific brand. Processor brands of fresh pork sausages led all offerings in supermarket ad circulars during the three summer holidays in 2017 and during Memorial Day 2018, averaging around three-fourths of offerings. Memorial Day 2017 was an exception to this marketing pattern when two large national chains ran features of store-branded pork sausages, increasing the share of the store brand category for that holiday. One of these chains repeated this offer during the Fourth of July which raised the store brand share during that holiday as well. Typically, about 15 percent of stores feature product packed under their private label during these holidays.

Over the past year, 31 distinct processor brands have been identified in supermarket advertising during the summer holidays. The most common of these, Johnsonville, is the largest sausage maker in the U.S. and one of the few with national penetration and name recognition. Johnsonville offerings typically command 84-85 percent of featured processor pork sausage brands during the holidays. Most of the remaining processor brands of pork sausages are marketed within specific regions or localities, using their "localness" as a primary marketing tool. Johnsonville aside, of the remaining processor, Premio, based in New Jersey and widely distributed along the Atlantic Seaboard, has the most recorded ad penetration, typically accounting for 27 percent of ad share. Premio also co-packs for a number of supermarket chains under their respective store brands. Most of the other processor brands have not enjoyed a consistent level of promotion from one summer holiday to the next over the past year. For example, Smithfield's Yuengling brand was featured in 18 percent of surveyed store ads during July 4<sup>th</sup>, 2017 but that share fell to 9 percent at Labor Day and was only at 2 percent for Memorial Day 2018, with most promotional activity based in the upper Atlantic Seaboard. Smithfield's Farmland division also markets pork sausages under their Boulevard brand which enjoys some retail feature activity in the Midwest, 2-4 percent share of the non-Johnsonville processor brands during the summer months in 2017. Combined, Yuengling and Boulevard (both popular regional beer brands) commanded 15 percent of supermarket featuring of pork sausages during the three summer holidays in 2017.

Average advertised sale prices are usually lowest during the Independence Day holiday with Labor Day average prices the highest of the big 3 summer events, 8 percent more in 2017 than during Memorial and Independence Days. Advertised prices for pork sausages in supermarkets are typically lower through the mid-quadrimester (May-Aug). In 2017, average ad prices during the Fourth averaged 4-5 percent below Memorial Day and 7-8 percent below Labor Day. Sale prices of Italian pork sausages average 9 percent below their bratwurst counterparts in the Apr-Aug 2017 period.

Processor Brand Ad Share*	
2017 Summer Holidays	
1	27.3% Premio
2	15.0% Smithfield
3	10.8% Perri
4	10.3% Roma Brand
5	5.5% Hatfield
6	5.2% DiLuigi
7	3.2% Sheboygan
8	3.2% T & J Sausage
9	2.9% Uncle Charley's
10	2.8% New York Style
11	2.3% Greenridge Farm
12	2.2% Klement's
13	2.1% Cantella's
14	1.7% Isernio's
15	1.6% Redondo's
16	1.4% Williams
17	0.9% Swaggerty's
18	0.5% Abbyland
19	0.4% Randolph
20	0.3% Fletcher's
21	0.2% Supreme Tender
22	0.2% Wholey's
23	0.1% Leidy's

\*Johnsonville not included.  
table 2

Brands	Memorial Day		Independence Day		Labor Day	
	2018 share	2018 avg \$/lb	2017 share	2017 avg \$/lb	2017 share	2017 avg \$/lb
Processor	75%	3.06	56%	3.09	73%	3.03
Store	15%	2.73	41%	2.46	24%	2.23
Distributor	0.3%	3.34	0.8%	2.94	1%	2.70
not identified	10%	2.85	2%	3.25	3%	3.09
<b>Overall</b>	<b>2.99</b>	<b>2.83</b>	<b>2.84</b>	<b>3.06</b>	<b>3.12</b>	<b>2.82</b>

Information for this report was derived from data reported in the [Feature Advertising by U.S. Supermarkets Meat and Poultry](#) and the [Retail Pork Feature Activity](#) reports.

