

**Retail Beef Performance**  
**IRI/Freshlook Marketing and USDA Market News**  
**September 2017 Highlights**

1. **Dollar Sales:** September beef dollar sales increased (+2.4%) versus the prior year. Chicken dollar sales increased (+3.6%) while pork dollar sales decreased (-0.6%). September total meat category dollar sales increased (+2.1%).
2. **Pound Sales:** September beef pound sales versus a year ago decreased (-0.8%) and the total meat category decreased (-1.4%). Chicken pound sales decreased (-1.5%) versus a year ago and pork pounds decreased (-3.0%).
3. **Average Price:** September's average price per pound for beef increased (+3.3%) versus a year ago to \$4.89/lb., and was down from August's average price of \$5.03/lb. Chicken price increased (+5.1%) and pork price increased (+2.5%). Beef's average price per pound for the latest 52 weeks decreased (-2.5%), less than August's 52-week decrease (-3.7%).
4. **Feature Activity and Share:** September beef retail feature activity decreased (-6.8%). Ad activity increased for chicken (+6.8%) but decreased for pork (-12.5%). Beef ad share decreased (-0.6%) for September but it remains the most featured protein (40.9%) across all meat ads compared to chicken (28.6%) and pork (23.8%).
5. **Feature Price:** Average total meat feature price increased (+0.6%) in September. The average feature price increased for beef (+0.8%) and chicken (+8.8%) and decreased for pork (-3.1%). Beef volume sold on feature represented 30.5% of total September beef pound sales, on par with 30.5% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

September 2017

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/28/17-10/01/17	% Change	WE 10/01/17	% Change	WE 10/01/17	% Change
<b>TOTAL MEAT</b>	<b>\$4,685,184,027</b>	<b>+ 2.1%</b>	<b>\$11,992,682,978</b>	<b>+ 2.7%</b>	<b>\$48,917,600,153</b>	<b>+ 0.8%</b>
Beef	\$2,407,094,834	+ 2.4%	\$6,155,522,714	+ 3.2%	\$24,392,773,117	+ 0.7%
Chicken	\$1,232,240,845	+ 3.6%	\$3,187,102,897	+ 4.4%	\$12,325,659,032	+ 4.0%
Pork	\$754,177,227	- 0.6%	\$1,913,410,035	- 0.9%	\$8,286,117,156	- 2.9%
Turkey	\$197,986,880	+ 1.2%	\$492,999,276	+ 1.7%	\$2,856,562,125	+ 0.6%
Lamb	\$33,624,330	- 2.4%	\$87,021,453	- 2.3%	\$401,878,647	- 1.3%
Veal	\$5,371,097	- 15.1%	\$13,848,681	- 9.0%	\$65,545,741	- 6.8%
Other*	\$54,688,814	- 1.3%	\$142,777,922	+ 0.5%	\$589,064,335	+ 1.0%

## Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/28/17-10/01/17	% Change	WE 10/01/17	% Change	WE 10/01/17	% Change
<b>TOTAL MEAT</b>	<b>1,355,700,177</b>	<b>- 1.4%</b>	<b>3,452,844,570</b>	<b>0.0%</b>	<b>15,089,460,802</b>	<b>+ 1.5%</b>
Beef	492,234,001	- 0.8%	1,239,088,811	+ 0.6%	5,102,064,089	+ 3.3%
Chicken	508,920,710	- 1.5%	1,320,331,762	- 0.2%	5,194,943,681	+ 1.4%
Pork	271,292,407	- 3.0%	688,699,067	- 1.2%	3,213,384,550	- 1.0%
Turkey	63,560,197	+ 3.5%	153,264,778	+ 3.9%	1,355,579,714	+ 1.5%
Lamb	4,342,200	- 9.2%	11,230,551	- 8.8%	56,435,241	- 2.9%
Veal	768,711	- 13.0%	1,952,454	- 7.6%	9,427,055	- 6.2%
Other*	14,581,952	- 2.5%	38,277,148	+ 0.4%	157,626,471	+ 0.5%

## Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/28/17-10/01/17	% Change	WE 10/01/17	% Change	WE 10/01/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.46</b>	<b>+ 3.5%</b>	<b>\$3.47</b>	<b>+ 2.7%</b>	<b>\$3.24</b>	<b>- 0.6%</b>
Beef	\$4.89	+ 3.3%	\$4.97	+ 2.6%	\$4.78	- 2.5%
Chicken	\$2.42	+ 5.1%	\$2.41	+ 4.7%	\$2.37	+ 2.6%
Pork	\$2.78	+ 2.5%	\$2.78	+ 0.3%	\$2.58	- 2.0%
Turkey	\$3.11	- 2.2%	\$3.22	- 2.1%	\$2.11	- 0.9%
Lamb	\$7.74	+ 7.5%	\$7.75	+ 7.1%	\$7.12	+ 1.6%
Veal	\$6.99	- 2.5%	\$7.09	- 1.6%	\$6.95	- 0.6%
Other*	\$3.75	+ 1.2%	\$3.73	+ 0.1%	\$3.74	+ 0.5%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System  
Five Weeks Ending 10/01/17



# Total US - Fresh Meat Feature and Promotion

September 2017

## Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/28/17 - 10/1/17	% Change	WE 10/1/17	% Change	WE 10/1/17	% Change
<b>TOTAL MEAT</b>	<b>1,183,221</b>	<b>-5.5%</b>	<b>3,058,728</b>	<b>-3.3%</b>	<b>12,841,001</b>	<b>4.8%</b>
Beef	483,870	-6.8%	1,230,470	-5.7%	5,187,670	3.2%
Chicken	338,869	6.8%	911,138	9.1%	3,368,894	11.7%
Lamb	8,930	-50.7%	29,780	-36.8%	214,015	-21.8%
Pork	281,270	-12.5%	715,105	-9.3%	2,970,630	0.1%
Turkey	63,897	-9.3%	156,030	-10.9%	1,028,407	12.6%
Veal	6,385	13.3%	16,205	26.8%	71,385	33.2%

## Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/28/17 - 10/1/17	% Change	WE 10/1/17	% Change	WE 10/1/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	40.9%	-0.6%	40.2%	-1.0%	40.4%	-0.6%
Chicken	28.6%	3.3%	29.8%	3.4%	26.2%	1.6%
Lamb	0.8%	-0.7%	1.0%	-0.5%	1.7%	-0.6%
Pork	23.8%	-1.9%	23.4%	-1.5%	23.1%	-1.1%
Turkey	5.4%	-0.2%	5.1%	-0.4%	8.0%	0.6%
Veal	0.5%	0.1%	0.5%	0.1%	0.6%	0.1%

## Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/28/17 - 10/1/17	% Change	WE 10/1/17	% Change	WE 10/1/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.88</b>	<b>0.6%</b>	<b>\$ 3.93</b>	<b>0.6%</b>	<b>\$ 3.83</b>	<b>-3.0%</b>
Beef	\$ 5.40	0.8%	\$ 5.48	1.5%	\$ 5.40	-3.4%
Chicken	\$ 2.74	8.8%	\$ 2.82	7.1%	\$ 2.66	2.4%
Lamb	\$ 7.15	5.9%	\$ 7.00	2.7%	\$ 6.99	2.6%
Pork	\$ 2.54	-3.1%	\$ 2.58	-2.6%	\$ 2.52	-3.5%
Turkey	\$ 3.47	-1.0%	\$ 3.47	-0.5%	\$ 2.66	-1.0%
Veal	\$ 7.98	17.0%	\$ 7.39	-3.0%	\$ 7.33	-8.8%

## Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/28/17 - 10/1/17		WE 10/1/17		WE 10/1/17	
<b>TOTAL MEAT</b>	<b>27.5%</b>	<b>\$ 3.10</b>	<b>26.3%</b>	<b>\$ 3.11</b>	<b>28.3%</b>	<b>\$ 2.83</b>
Beef	30.5%	\$ 4.52	28.6%	\$ 4.59	30.5%	\$ 4.40
Chicken	21.2%	\$ 1.97	21.5%	\$ 1.98	22.4%	\$ 1.93
Lamb	30.8%	\$ 2.29	29.1%	\$ 2.30	30.8%	\$ 2.24
Pork	22.0%	\$ 2.44	21.4%	\$ 2.62	31.5%	\$ 1.39
Turkey	14.1%	\$ 6.13	12.7%	\$ 6.25	18.9%	\$ 5.79
Veal	13.5%	\$ 5.22	13.3%	\$ 5.81	15.4%	\$ 6.11

Class - Fresh meat cuts, ground meat and poultry parts. Excludes ham, bacon, franks, sausage, lunch meats, prepared products and byproducts

Feature Outlet Count - Total of sample stores with ad

Feature Outlet Share - Outlets with ad as a percent to the total ad outlets

Feature Average Price - Total outlets with ad times the ad price divided by the ad count

Promotion Percent on Sale - Feature sales as a percent to total sales

Promotion Weighted Sale Price - Feature sales divided by feature pounds

Sourced by USDA Market News and IRI/FreshLook Marketing, categorized by the VMMEAT® System

