

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

1. **Dollar Sales:** October beef dollar sales increased (+3.1%) versus the prior year. Chicken dollar sales increased (+4.2%) while pork dollar sales decreased (-0.2%). October total meat category dollar sales increased (+2.7%).
2. **Pound Sales:** October beef pound sales versus a year ago increased (+0.8%) and the total meat category increased (+1.3%). Chicken pound sales increased (+2.2%) versus a year ago and pork pounds increased (+0.2%).
3. **Average Price:** October's average price per pound for beef increased (+2.3%) versus a year ago to \$4.74/lb., and was down from September's average price of \$4.89/lb. Chicken price increased (+1.9%) whereas pork price decreased (-0.4%). Beef's average price per pound for the latest 52 weeks decreased (-1.7%), less than September's 52-week decrease (-2.5%).
4. **Feature Activity and Share:** October beef retail feature activity decreased (-7.7%). Ad activity increased for chicken (+16.2%) but decreased for pork (-7.6%). Beef ad share decreased (-2.5%) for October but it remains the most featured protein (39.0%) across all meat ads compared to chicken (31.1%) and pork (22.1%).
5. **Feature Price:** Average total meat feature price decreased (-1.9%) in October. The average feature price increased for beef (+1.2%) and chicken (+2.6%) yet decreased for pork (-1.6%). Beef volume sold on feature represented 30.4% of total October beef pound sales, on par with 30.4% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

October 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/02/17-10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	\$3,696,446,879	+ 2.7%	\$12,040,923,935	+ 2.5%	\$49,015,357,731	+ 1.2%
Beef	\$1,898,618,948	+ 3.1%	\$6,179,107,058	+ 3.0%	\$24,449,927,628	+ 1.2%
Chicken	\$970,274,549	+ 4.2%	\$3,186,512,603	+ 4.1%	\$12,364,831,544	+ 4.0%
Pork	\$579,663,727	- 0.2%	\$1,908,547,348	- 0.8%	\$8,284,717,797	- 2.5%
Turkey	\$171,866,030	+ 2.0%	\$521,937,079	+ 1.8%	\$2,859,990,772	+ 0.9%
Lamb	\$27,463,002	+ 1.3%	\$87,860,861	- 1.5%	\$402,225,838	- 1.2%
Veal	\$4,920,050	- 12.6%	\$14,571,279	- 11.5%	\$64,833,855	- 7.2%
Other*	\$43,640,573	- 0.5%	\$142,387,706	- 0.1%	\$588,830,298	+ 0.7%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/02/17-10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	1,099,096,095	+ 1.3%	3,499,278,706	- 0.2%	15,103,283,114	+ 1.4%
Beef	400,199,086	+ 0.8%	1,264,839,120	+ 0.2%	5,105,250,424	+ 2.9%
Chicken	410,454,185	+ 2.2%	1,324,631,390	- 0.2%	5,203,845,951	+ 1.4%
Pork	214,462,592	+ 0.2%	689,824,427	- 1.5%	3,213,795,335	- 0.8%
Turkey	58,328,114	+ 3.5%	168,688,998	+ 3.6%	1,357,574,834	+ 1.8%
Lamb	3,626,532	- 5.8%	11,415,654	- 8.2%	56,211,394	- 3.5%
Veal	715,631	- 12.5%	2,079,487	- 10.4%	9,324,735	- 6.5%
Other*	11,309,954	- 3.0%	37,799,630	- 1.2%	157,280,442	- 0.2%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/02/17-10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	\$3.36	+ 1.4%	\$3.44	+ 2.7%	\$3.25	- 0.2%
Beef	\$4.74	+ 2.3%	\$4.89	+ 2.8%	\$4.79	- 1.7%
Chicken	\$2.36	+ 1.9%	\$2.41	+ 4.3%	\$2.38	+ 2.6%
Pork	\$2.70	- 0.4%	\$2.77	+ 0.8%	\$2.58	- 1.7%
Turkey	\$2.95	- 1.5%	\$3.09	- 1.8%	\$2.11	- 0.9%
Lamb	\$7.57	+ 7.5%	\$7.70	+ 7.3%	\$7.16	+ 2.3%
Veal	\$6.88	- 0.1%	\$7.01	- 1.2%	\$6.95	- 0.8%
Other*	\$3.86	+ 2.5%	\$3.77	+ 1.1%	\$3.74	+ 0.9%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 10/29/17



Total US - Fresh Meat Feature and Promotion

October 2017

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/2/17 - 10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	1,009,024	-1.9%	3,128,783	-3.4%	12,821,759	3.9%
Beef	393,640	-7.7%	1,253,050	-6.8%	5,154,810	2.2%
Chicken	313,663	16.2%	944,939	11.5%	3,412,704	11.9%
Lamb	10,265	-27.5%	29,850	-36.8%	210,120	-22.8%
Pork	222,770	-7.6%	711,725	-10.1%	2,952,410	-1.0%
Turkey	65,416	-6.9%	174,104	-9.5%	1,023,580	8.7%
Veal	3,270	-49.8%	15,115	-1.5%	68,135	25.5%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/2/17 - 10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	39.0%	-2.5%	40.0%	-1.5%	40.2%	-0.7%
Chicken	31.1%	4.8%	30.2%	4.0%	26.6%	1.9%
Lamb	1.0%	-0.4%	1.0%	-0.5%	1.6%	-0.6%
Pork	22.1%	-1.4%	22.7%	-1.7%	23.0%	-1.1%
Turkey	6.5%	-0.3%	5.6%	-0.4%	8.0%	0.4%
Veal	0.3%	-0.3%	0.5%	0.0%	0.5%	0.1%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/2/17 - 10/29/17	% Change	WE 10/29/17	% Change	WE 10/29/17	% Change
TOTAL MEAT	\$ 3.73	-1.9%	\$ 3.86	-0.1%	\$ 3.83	-2.6%
Beef	\$ 5.22	1.2%	\$ 5.37	1.1%	\$ 5.41	-2.5%
Chicken	\$ 2.71	2.6%	\$ 2.77	6.7%	\$ 2.67	2.4%
Lamb	\$ 7.22	4.4%	\$ 7.10	3.9%	\$ 7.01	3.0%
Pork	\$ 2.53	-1.6%	\$ 2.56	-2.2%	\$ 2.52	-3.0%
Turkey	\$ 3.07	-8.3%	\$ 3.31	-3.2%	\$ 2.64	-2.5%
Veal	\$ 6.98	-4.4%	\$ 7.62	5.7%	\$ 7.31	-5.6%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/2/17 - 10/29/17		WE 10/29/17		WE 10/29/17	
TOTAL MEAT	28.5%	\$ 2.85	27.3%	\$ 3.04	28.3%	\$ 2.82
Beef	30.4%	\$ 4.27	29.8%	\$ 4.49	30.4%	\$ 4.40
Chicken	23.5%	\$ 1.80	22.1%	\$ 1.92	22.4%	\$ 1.93
Lamb	33.9%	\$ 2.18	30.5%	\$ 2.26	30.9%	\$ 2.23
Pork	22.1%	\$ 2.28	22.1%	\$ 2.45	31.5%	\$ 1.40
Turkey	16.5%	\$ 6.15	14.3%	\$ 6.21	18.9%	\$ 5.81
Veal	18.6%	\$ 6.78	15.3%	\$ 6.09	15.0%	\$ 6.07

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

