

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

1. **Dollar Sales:** January beef dollar sales increased (+7.7%) versus the prior year. Chicken dollar sales increased (+5.4%) while pork dollar sales increased (+1.8%). January total meat category dollar sales increased (+5.7%).
2. **Pound Sales:** January beef pound sales versus a year ago increased (+5.4%) and the total meat category increased (+2.3%). Chicken pound sales increased (+2.0%) versus a year ago and pork pounds decreased (-2.0%).
3. **Average Price:** January's average price per pound for beef increased (+2.2%) versus a year ago to \$4.63/lb., down seasonally from December's average price of \$4.90/lb. Chicken price increased (+3.3%) whereas pork price increased (+3.8%). Beef's average price per pound for the latest 52 weeks increased (+0.3%), as opposed to December's 52-week decrease (-0.1%).
4. **Feature Activity and Share:** January beef retail feature activity decreased (-5.5%). Ad activity decreased for chicken (-7.6%) and for pork (-15.4%) as featuring activity for all meat and poultry declined sharply (-8.2%). Beef ad share increased (+1.2%) for January and it remains the most featured protein (41.8%) across all meat ads compared to chicken (28.3%) and pork (21.9%).
5. **Feature Price:** Average total meat feature price increased (+4.3%) in January. The average feature price for beef increased (+3.6%). It increased for chicken (+6.9%) and decreased for pork (-0.5%). Beef volume sold on feature represented 28.6% of total January beef pound sales, lower than the 29.9% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

January 2018

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/01/18-01/28/18	% Change	WE 01/28/18	% Change	WE 01/28/18	% Change
TOTAL MEAT	\$3,902,852,226	+ 5.7%	\$13,271,966,997	+ 3.4%	\$49,447,566,608	+ 2.2%
Beef	\$1,974,617,737	+ 7.7%	\$6,311,482,309	+ 6.2%	\$24,816,700,330	+ 3.0%
Chicken	\$1,071,873,187	+ 5.4%	\$3,058,483,848	+ 4.8%	\$12,504,060,098	+ 4.4%
Pork	\$592,534,422	+ 1.8%	\$2,352,009,937	- 0.9%	\$8,264,488,102	- 1.7%
Turkey	\$182,392,848	+ 1.6%	\$1,266,092,653	- 4.3%	\$2,803,380,665	- 1.4%
Lamb	\$31,357,890	+ 6.6%	\$106,811,073	+ 1.5%	\$403,757,924	- 0.5%
Veal	\$5,616,587	- 0.4%	\$17,402,172	- 4.6%	\$63,994,237	- 6.4%
Other*	\$44,459,556	+ 3.2%	\$159,685,006	+ 1.5%	\$591,185,252	+ 0.7%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/01/18-01/28/18	% Change	WE 01/28/18	% Change	WE 01/28/18	% Change
TOTAL MEAT	1,165,522,253	+ 2.3%	4,480,041,897	+ 0.9%	15,144,676,271	+ 1.1%
Beef	426,385,176	+ 5.4%	1,322,332,468	+ 3.6%	5,150,907,532	+ 2.7%
Chicken	440,193,103	+ 2.0%	1,263,525,080	+ 1.7%	5,224,854,393	+ 1.2%
Pork	223,304,786	- 2.0%	970,605,068	- 1.7%	3,196,654,826	- 1.4%
Turkey	59,041,163	+ 0.5%	865,658,188	- 0.6%	1,352,010,345	+ 0.8%
Lamb	4,388,252	+ 0.7%	14,411,839	- 6.5%	55,212,309	- 5.2%
Veal	839,737	+ 3.6%	2,639,689	- 3.7%	9,224,651	- 5.7%
Other*	11,370,036	0.0%	40,869,564	- 3.5%	155,812,216	- 1.2%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/01/18-01/28/18	% Change	WE 01/28/18	% Change	WE 01/28/18	% Change
TOTAL MEAT	\$3.35	+ 3.3%	\$2.96	+ 2.4%	\$3.27	+ 1.1%
Beef	\$4.63	+ 2.2%	\$4.77	+ 2.5%	\$4.82	+ 0.3%
Chicken	\$2.44	+ 3.3%	\$2.42	+ 3.0%	\$2.39	+ 3.2%
Pork	\$2.65	+ 3.8%	\$2.42	+ 0.9%	\$2.59	- 0.4%
Turkey	\$3.09	+ 1.1%	\$1.46	- 3.7%	\$2.07	- 2.2%
Lamb	\$7.15	+ 5.8%	\$7.41	+ 8.5%	\$7.31	+ 5.0%
Veal	\$6.69	- 3.8%	\$6.59	- 1.0%	\$6.94	- 0.8%
Other*	\$3.91	+ 3.3%	\$3.91	+ 5.1%	\$3.79	+ 2.0%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 01/28/18



Total US - Fresh Meat Feature and Promotion

January 2018

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/1/18 - 1/28/18	% Change	WE 1/28/18	% Change	WE 1/28/18	% Change
TOTAL MEAT	904,379	-8.2%	3,111,473	-6.2%	12,617,128	0.7%
Beef	377,840	-5.5%	1,242,180	-4.8%	5,092,605	-0.1%
Chicken	255,640	-7.6%	699,408	-5.7%	3,370,780	8.0%
Lamb	9,620	-19.0%	57,225	-25.1%	190,905	-25.2%
Pork	197,830	-15.4%	609,640	-15.6%	2,839,885	-5.6%
Turkey	57,749	4.0%	488,285	7.5%	1,057,633	7.6%
Veal	5,700	-20.8%	14,735	-16.0%	65,320	10.5%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/1/18 - 1/28/18	% Change	WE 1/28/18	% Change	WE 1/28/18	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	41.8%	1.2%	39.9%	0.6%	40.4%	-0.3%
Chicken	28.3%	0.2%	22.5%	0.1%	26.7%	1.8%
Lamb	1.1%	-0.1%	1.8%	-0.5%	1.5%	-0.5%
Pork	21.9%	-1.9%	19.6%	-2.2%	22.5%	-1.5%
Turkey	6.4%	0.7%	15.7%	2.0%	8.4%	0.5%
Veal	0.6%	-0.1%	0.5%	-0.1%	0.5%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/1/18 - 1/28/18	% Change	WE 1/28/18	% Change	WE 1/28/18	% Change
TOTAL MEAT	\$ 3.81	4.3%	\$ 3.75	1.3%	\$ 3.84	-0.9%
Beef	\$ 5.13	3.6%	\$ 5.47	1.7%	\$ 5.43	-0.7%
Chicken	\$ 2.78	6.9%	\$ 2.71	4.0%	\$ 2.69	4.4%
Lamb	\$ 7.13	1.3%	\$ 7.48	5.6%	\$ 7.12	4.1%
Pork	\$ 2.45	-0.5%	\$ 2.50	1.0%	\$ 2.53	-2.5%
Turkey	\$ 3.48	7.4%	\$ 1.91	-2.7%	\$ 2.59	-3.5%
Veal	\$ 7.03	-9.0%	\$ 7.21	0.9%	\$ 7.33	-3.3%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/1/18 - 1/28/18		WE 1/28/18		WE 1/28/18	
TOTAL MEAT	26.9%	\$ 2.84	28.6%	\$ 2.39	27.9%	\$ 2.82
Beef	28.6%	\$ 4.12	29.5%	\$ 4.46	29.9%	\$ 4.41
Chicken	23.1%	\$ 1.86	21.9%	\$ 1.97	22.3%	\$ 1.93
Lamb	30.8%	\$ 2.25	28.5%	\$ 2.18	30.4%	\$ 2.23
Pork	22.0%	\$ 2.46	42.0%	\$ 1.03	31.2%	\$ 1.34
Turkey	21.5%	\$ 5.55	20.4%	\$ 6.17	18.8%	\$ 5.92
Veal	16.3%	\$ 5.99	14.7%	\$ 5.56	14.7%	\$ 5.94

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

