

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

1. **Dollar Sales:** February beef dollar sales increased (+0.6%) versus the prior year, the first increase since June, 2016 (+0.1%). Chicken dollar sales increased (+5.9%) while pork dollar sales decreased (-4.8%). February total meat category dollar sales increased (+1.1%).
2. **Pound Sales:** February beef pound sales versus a year ago increased (+5.3%) while the total meat category increased (+3.2%). Chicken pound sales increased (+4.1%) versus a year ago while pork pounds decreased (-2.5%).
3. **Average Price:** February's average price per pound for beef decreased (-4.4%) versus a year ago to \$4.67/lb., up from January's average price of \$4.61/lb. Chicken price increased (+1.7%) and pork price decreased (-2.3%). Beef's average price per pound for the latest 52 weeks decreased (-7.5%) compared to January's 52-week decrease (-7.8%).
4. **Feature Activity and Share:** February beef retail feature activity increased (+10.8%). Ad activity increased for chicken (+16.6%) as well as for pork (+3.4%). Beef ad share increased (+0.5%) for the latest 52-week period and it remains the most featured protein (40.7%) of all meat ads compared to chicken (25.0%) and pork (23.9%).
5. **Feature Price:** Average total meat feature price decreased (-5.5%) in February. The average feature price decreased for beef (-6.5%), as well as for pork (-0.8%) and chicken (-3.5%). Beef volume sold on feature represented 31.5% of total February beef pound sales, an increase from 31.3% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

February 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/23/17-02/19/17	% Change	WE 02/19/17	% Change	WE 02/19/17	% Change
TOTAL MEAT	\$3,637,244,572	+ 1.1%	\$12,435,180,645	0.0%	\$48,230,390,293	- 2.2%
Beef	\$1,835,167,868	+ 0.6%	\$5,998,545,128	- 0.8%	\$23,981,664,105	- 3.3%
Chicken	\$977,869,186	+ 5.9%	\$2,993,052,716	+ 4.4%	\$12,005,109,799	+ 2.2%
Pork	\$578,844,342	- 4.8%	\$2,263,122,796	- 3.8%	\$8,350,803,288	- 6.6%
Turkey	\$165,533,775	+ 1.0%	\$901,555,853	+ 1.5%	\$2,831,379,192	+ 0.1%
Lamb	\$28,763,861	+ 1.0%	\$105,362,463	- 0.6%	\$405,720,616	+ 1.0%
Veal	\$5,745,956	- 5.1%	\$18,331,674	- 7.0%	\$67,463,901	- 8.3%
Other*	\$45,319,583	+ 1.2%	\$155,210,016	+ 1.0%	\$588,249,392	+ 7.1%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/23/17-02/19/17	% Change	WE 02/19/17	% Change	WE 02/19/17	% Change
TOTAL MEAT	1,098,754,546	+ 3.2%	4,006,999,592	+ 2.8%	14,889,394,425	+ 2.1%
Beef	393,044,004	+ 5.3%	1,276,435,710	+ 4.1%	4,981,812,648	+ 4.6%
Chicken	412,905,555	+ 4.1%	1,263,826,854	+ 3.1%	5,140,071,834	+ 2.7%
Pork	223,348,832	- 2.5%	934,898,560	- 0.3%	3,208,650,230	- 2.2%
Turkey	52,079,325	+ 6.7%	472,430,554	+ 5.4%	1,333,782,116	+ 0.6%
Lamb	4,106,060	+ 4.1%	15,270,734	+ 0.7%	57,721,999	+ 3.6%
Veal	811,947	- 5.3%	2,701,926	- 6.5%	9,673,031	- 6.9%
Other*	12,458,824	+ 3.0%	41,435,255	0.0%	157,682,567	+ 9.5%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/23/17-02/19/17	% Change	WE 02/19/17	% Change	WE 02/19/17	% Change
TOTAL MEAT	\$3.31	- 2.1%	\$3.10	- 2.7%	\$3.24	- 4.3%
Beef	\$4.67	- 4.4%	\$4.70	- 4.6%	\$4.81	- 7.5%
Chicken	\$2.37	+ 1.7%	\$2.37	+ 1.2%	\$2.34	- 0.5%
Pork	\$2.59	- 2.3%	\$2.42	- 3.5%	\$2.60	- 4.5%
Turkey	\$3.18	- 5.3%	\$1.91	- 3.7%	\$2.12	- 0.5%
Lamb	\$7.01	- 2.9%	\$6.90	- 1.3%	\$7.03	- 2.5%
Veal	\$7.08	+ 0.2%	\$6.78	- 0.6%	\$6.97	- 1.5%
Other*	\$3.64	- 1.7%	\$3.75	+ 1.0%	\$3.73	- 2.2%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 02/19/17



Total US - Fresh Meat Feature and Promotion

February 2017

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/23/17 - 2/19/17	% Change	WE 2/19/17	% Change	WE 2/19/17	% Change
TOTAL MEAT	971,919	10.4%	3,221,843	8.1%	12,602,083	3.3%
Beef	407,420	10.8%	1,331,980	7.3%	5,129,445	4.6%
Chicken	259,479	16.6%	775,699	12.2%	3,152,373	2.8%
Lamb	15,110	-27.0%	73,040	-16.8%	251,450	-7.4%
Pork	230,030	3.4%	740,300	6.2%	3,014,230	1.4%
Turkey	53,930	29.4%	283,154	13.4%	995,065	7.3%
Veal	5,950	20.4%	17,670	28.7%	59,520	5.5%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/23/17 - 2/19/17	% Change	WE 2/19/17	% Change	WE 2/19/17	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	41.9%	0.1%	41.3%	-0.3%	40.7%	0.5%
Chicken	26.7%	1.4%	24.1%	0.9%	25.0%	-0.1%
Lamb	1.6%	-0.8%	2.3%	-0.7%	2.0%	-0.2%
Pork	23.7%	-1.6%	23.0%	-0.4%	23.9%	-0.5%
Turkey	5.5%	0.8%	8.8%	0.4%	7.9%	0.3%
Veal	0.6%	0.1%	0.5%	0.1%	0.5%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/23/17 - 2/19/17	% Change	WE 2/19/17	% Change	WE 2/19/17	% Change
TOTAL MEAT	\$ 3.77	-5.5%	\$ 3.82	-5.2%	\$ 3.86	-5.5%
Beef	\$ 5.27	-6.5%	\$ 5.38	-5.8%	\$ 5.45	-7.5%
Chicken	\$ 2.43	-3.5%	\$ 2.57	-5.3%	\$ 2.57	-1.3%
Lamb	\$ 7.17	3.6%	\$ 7.14	3.6%	\$ 6.86	-3.2%
Pork	\$ 2.47	-0.8%	\$ 2.47	-1.5%	\$ 2.59	-4.8%
Turkey	\$ 3.06	-7.7%	\$ 2.41	0.5%	\$ 2.68	-1.5%
Veal	\$ 7.14	-13.8%	\$ 7.34	-7.9%	\$ 7.46	-12.5%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/23/17 - 2/19/17		WE 2/19/17		WE 2/19/17	
TOTAL MEAT	28.7%	\$ 2.94	29.3%	\$ 2.78	29.1%	\$ 2.83
Beef	31.5%	\$ 4.37	31.8%	\$ 4.47	31.3%	\$ 4.48
Chicken	23.0%	\$ 1.84	22.6%	\$ 1.91	23.2%	\$ 1.88
Lamb	31.9%	\$ 2.20	31.2%	\$ 2.20	31.8%	\$ 2.28
Pork	23.3%	\$ 2.57	32.2%	\$ 1.36	31.6%	\$ 1.40
Turkey	19.9%	\$ 5.99	21.8%	\$ 5.85	21.0%	\$ 5.83
Veal	14.9%	\$ 7.07	15.3%	\$ 6.29	16.5%	\$ 6.53

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

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 FreshLook Marketing, categorized by the VMMEAT® System

