

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

1. **Dollar Sales:** April beef dollar sales increased (+2.3%) versus the prior year. Chicken dollar sales decreased (-0.5%) while pork dollar sales increased (+23.1%), impacted by a later Easter. April total meat category dollar sales increased (+6.2%).
2. **Pound Sales:** April beef pound sales versus a year ago increased (+5.3%) while the total meat category increased (+10.8%). Chicken pound sales decreased (-3.2%) versus a year ago while pork pounds increased (+38.9%).
3. **Average Price:** April's average price per pound for beef decreased (-2.8%) versus a year ago to \$4.80/lb., up from March's average price of \$4.54/lb. Chicken price increased (+2.8%) and pork price decreased (-11.4%). Beef's average price per pound for the latest 52 weeks decreased (-7.0%) in line with March's 52-week decrease (-7.5%).
4. **Feature Activity and Share:** April beef retail feature activity increased (+6.4%). Ad activity decreased for chicken (-1.9%) as well as for pork (-2.9%). Beef ad share increased (+0.2%) for the latest 52-week period and it remains the most featured protein (40.7%) across all meat ads compared to chicken (25.2%) and pork (23.6%).
5. **Feature Price:** Average total meat feature price decreased (-0.1%) in April. The average feature price increased for beef (+0.5%), as well as for chicken (+0.5%) but decreased for pork (-3.7%). Beef volume sold on feature represented 31.0% of total April beef pound sales, a decrease from 31.5% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

April 2017

## Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/27/17-04/23/17	% Change	WE 04/23/17	% Change	WE 04/23/17	% Change
<b>TOTAL MEAT</b>	<b>\$3,766,175,086</b>	<b>+ 6.2%</b>	<b>\$11,918,677,647</b>	<b>+ 1.3%</b>	<b>\$48,349,320,590</b>	<b>- 1.6%</b>
Beef	\$1,816,789,711	+ 2.3%	\$5,997,917,493	+ 1.6%	\$24,062,353,755	- 2.4%
Chicken	\$924,502,618	- 0.5%	\$3,080,368,924	+ 4.0%	\$12,069,717,961	+ 2.2%
Pork	\$743,958,972	+ 23.1%	\$2,014,037,647	- 3.2%	\$8,314,248,897	- 5.6%
Turkey	\$178,423,295	+ 12.5%	\$546,499,889	+ 1.4%	\$2,837,349,743	+ 0.2%
Lamb	\$52,471,805	+ 55.6%	\$118,275,996	+ 1.7%	\$407,370,914	+ 1.0%
Veal	\$5,060,481	- 6.6%	\$17,661,888	- 5.2%	\$66,803,682	- 7.8%
Other*	\$44,968,204	+ 9.6%	\$143,915,809	+ 2.7%	\$591,475,637	+ 5.7%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/27/17-04/23/17	% Change	WE 04/23/17	% Change	WE 04/23/17	% Change
<b>TOTAL MEAT</b>	<b>1,162,990,513</b>	<b>+ 10.8%</b>	<b>3,614,680,409</b>	<b>+ 2.9%</b>	<b>14,958,068,063</b>	<b>+ 2.0%</b>
Beef	378,194,975	+ 5.3%	1,288,320,765	+ 6.5%	5,040,820,676	+ 4.9%
Chicken	383,876,847	- 3.2%	1,292,131,006	+ 2.1%	5,150,087,498	+ 2.0%
Pork	317,688,319	+ 38.9%	797,401,707	- 1.7%	3,200,535,952	- 2.1%
Turkey	62,474,358	+ 28.9%	177,726,319	+ 5.5%	1,339,746,996	+ 1.2%
Lamb	8,033,119	+ 60.8%	17,398,180	+ 3.1%	58,088,614	+ 3.2%
Veal	719,564	- 2.7%	2,520,180	- 2.5%	9,654,889	- 5.3%
Other*	12,003,330	+ 10.2%	39,182,251	+ 4.9%	159,133,438	+ 8.2%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/27/17-04/23/17	% Change	WE 04/23/17	% Change	WE 04/23/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.24</b>	<b>- 4.2%</b>	<b>\$3.30</b>	<b>- 1.5%</b>	<b>\$3.23</b>	<b>- 3.6%</b>
Beef	\$4.80	- 2.8%	\$4.66	- 4.7%	\$4.77	- 7.0%
Chicken	\$2.41	+ 2.8%	\$2.38	+ 1.9%	\$2.34	+ 0.2%
Pork	\$2.34	- 11.4%	\$2.53	- 1.5%	\$2.60	- 3.6%
Turkey	\$2.86	- 12.7%	\$3.07	- 3.9%	\$2.12	- 1.0%
Lamb	\$6.53	- 3.2%	\$6.80	- 1.4%	\$7.01	- 2.1%
Veal	\$7.03	- 4.0%	\$7.01	- 2.8%	\$6.92	- 2.7%
Other*	\$3.75	- 0.6%	\$3.67	- 2.1%	\$3.72	- 2.3%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 04/23/17



# Total US - Fresh Meat Feature and Promotion

April 2017

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	3/27/17 - 4/23/17	% Change	WE 4/23/17	% Change	WE 4/23/17	% Change
<b>TOTAL MEAT</b>	<b>1,000,742</b>	<b>10.2%</b>	<b>3,201,959</b>	<b>9.4%</b>	<b>12,786,390</b>	<b>5.5%</b>
Beef	386,780	6.4%	1,309,960	9.6%	5,204,345	6.0%
Chicken	239,479	-1.9%	843,504	14.7%	3,223,434	6.0%
Lamb	37,710	138.7%	68,820	-13.3%	246,460	-10.0%
Pork	226,040	-2.9%	736,110	2.2%	3,022,925	2.2%
Turkey	104,953	118.3%	224,865	23.4%	1,025,406	15.4%
Veal	5,780	57.1%	18,700	39.7%	63,820	16.4%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	3/27/17 - 4/23/17	% Change	WE 4/23/17	% Change	WE 4/23/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	38.6%	-1.4%	40.9%	0.1%	40.7%	0.2%
Chicken	23.9%	-3.0%	26.3%	1.2%	25.2%	0.1%
Lamb	3.8%	2.0%	2.1%	-0.6%	1.9%	-0.3%
Pork	22.6%	-3.1%	23.0%	-1.6%	23.6%	-0.7%
Turkey	10.5%	5.2%	7.0%	0.8%	8.0%	0.7%
Veal	0.6%	0.2%	0.6%	0.1%	0.5%	0.0%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	3/27/17 - 4/23/17	% Change	WE 4/23/17	% Change	WE 4/23/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.84</b>	<b>-0.1%</b>	<b>\$ 3.78</b>	<b>-3.7%</b>	<b>\$ 3.84</b>	<b>-5.0%</b>
Beef	\$ 5.44	0.5%	\$ 5.26	-5.5%	\$ 5.40	-7.2%
Chicken	\$ 2.55	0.5%	\$ 2.53	2.5%	\$ 2.59	0.7%
Lamb	\$ 6.55	1.9%	\$ 6.73	1.9%	\$ 6.89	-0.6%
Pork	\$ 2.51	-3.7%	\$ 2.46	-3.2%	\$ 2.57	-3.7%
Turkey	\$ 2.52	-25.4%	\$ 2.88	-3.4%	\$ 2.68	-0.2%
Veal	\$ 7.99	-3.0%	\$ 7.38	-9.9%	\$ 7.38	-12.3%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	3/27/17 - 4/23/17		WE 4/23/17		WE 4/23/17	
<b>TOTAL MEAT</b>	<b>27.6%</b>	<b>\$ 3.05</b>	<b>28.3%</b>	<b>\$ 2.95</b>	<b>29.1%</b>	<b>\$ 2.83</b>
Beef	31.0%	\$ 4.37	31.3%	\$ 4.20	31.5%	\$ 4.43
Chicken	21.1%	\$ 1.96	22.6%	\$ 1.90	22.9%	\$ 1.90
Lamb	28.8%	\$ 2.22	30.4%	\$ 2.20	31.5%	\$ 2.26
Pork	22.1%	\$ 2.09	22.5%	\$ 2.40	31.7%	\$ 1.39
Turkey	31.2%	\$ 5.27	25.0%	\$ 5.58	21.0%	\$ 5.84
Veal	12.8%	\$ 7.14	14.8%	\$ 6.45	16.1%	\$ 6.41

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

