

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

1. **Dollar Sales:** June beef dollar sales increased (+2.0%) versus the prior year. Chicken dollar sales increased (+4.8%) while pork dollar sales decreased (-3.2%). June total meat category dollar sales increased (+1.8%).
2. **Pound Sales:** June beef pound sales versus a year ago increased (+2.5%) while the total meat category increased (+1.7%). Chicken pound sales increased (+1.9%) versus a year ago while pork pounds decreased (-0.2%).
3. **Average Price:** June's average price per pound for beef decreased (-0.5%) versus a year ago to \$4.95/lb., but up from May's average price of \$4.87/lb. Chicken price increased (+2.8%) and pork price decreased (-2.9%). Beef's average price per pound for the latest 52 weeks decreased (-5.8%), less than May's 52-week decrease (-6.6%).
4. **Feature Activity and Share:** June beef retail feature activity decreased (-0.5%). Ad activity increased for chicken (+10.3%) as well as for pork (+3.0%). Beef ad share decreased (-0.3%) for the latest 52-week period but it remains the most featured protein (40.1%) across all meat ads compared to chicken (27.9%) and pork (24.8%).
5. **Feature Price:** Average total meat feature price decreased (-3.1%) in June. The average feature price decreased for beef (-2.3%), but increased for chicken (+4.4%) and decreased for pork (-5.2%). Beef volume sold on feature represented 30.3% of total June beef pound sales, a decrease from 31.3% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

June 2017

## Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/22/17-06/25/17	% Change	WE 06/25/17	% Change	WE 06/25/17	% Change
<b>TOTAL MEAT</b>	<b>\$4,724,822,546</b>	<b>+ 1.8%</b>	<b>\$12,131,800,136</b>	<b>+ 2.8%</b>	<b>\$48,461,058,872</b>	<b>- 1.0%</b>
Beef	\$2,461,076,121	+ 2.0%	\$6,135,957,031	+ 1.7%	\$24,123,274,266	- 1.6%
Chicken	\$1,216,270,971	+ 4.8%	\$3,105,721,856	+ 2.9%	\$12,160,680,594	+ 2.8%
Pork	\$768,430,338	- 3.2%	\$2,101,383,640	+ 5.1%	\$8,276,721,479	- 5.0%
Turkey	\$181,462,698	+ 2.3%	\$511,697,389	+ 4.4%	\$2,839,167,840	0.0%
Lamb	\$34,545,892	- 4.5%	\$116,365,274	+ 15.1%	\$403,860,744	- 0.9%
Veal	\$5,688,727	+ 1.5%	\$15,598,920	- 4.1%	\$66,498,141	- 7.5%
Other*	\$57,347,798	+ 0.8%	\$145,076,026	+ 2.3%	\$590,855,809	+ 3.4%

## Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/22/17-06/25/17	% Change	WE 06/25/17	% Change	WE 06/25/17	% Change
<b>TOTAL MEAT</b>	<b>1,372,458,365</b>	<b>+ 1.7%</b>	<b>3,607,342,742</b>	<b>+ 4.5%</b>	<b>14,999,020,920</b>	<b>+ 1.9%</b>
Beef	496,808,321	+ 2.5%	1,256,590,152	+ 3.5%	5,063,989,031	+ 4.4%
Chicken	514,367,004	+ 1.9%	1,304,370,971	+ 0.4%	5,168,391,677	+ 1.9%
Pork	285,642,861	- 0.2%	825,428,018	+ 11.8%	3,198,709,810	- 1.7%
Turkey	54,747,256	+ 4.9%	162,975,674	+ 11.2%	1,342,135,961	+ 1.1%
Lamb	4,573,525	- 9.9%	16,672,792	+ 14.7%	57,190,136	- 0.3%
Veal	800,426	+ 1.4%	2,204,398	- 3.0%	9,605,596	- 5.6%
Other*	15,518,972	0.0%	39,100,737	+ 2.6%	158,998,710	+ 5.3%

## Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/22/17-06/25/17	% Change	WE 06/25/17	% Change	WE 06/25/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.44</b>	<b>0.0%</b>	<b>\$3.36</b>	<b>- 1.6%</b>	<b>\$3.23</b>	<b>- 2.9%</b>
Beef	\$4.95	- 0.5%	\$4.88	- 1.7%	\$4.76	- 5.8%
Chicken	\$2.36	+ 2.8%	\$2.38	+ 2.4%	\$2.35	+ 0.8%
Pork	\$2.69	- 2.9%	\$2.55	- 6.0%	\$2.59	- 3.3%
Turkey	\$3.31	- 2.5%	\$3.14	- 6.1%	\$2.12	- 1.2%
Lamb	\$7.55	+ 5.9%	\$6.98	+ 0.3%	\$7.06	- 0.6%
Veal	\$7.11	+ 0.1%	\$7.08	- 1.1%	\$6.92	- 2.0%
Other*	\$3.70	+ 0.9%	\$3.71	- 0.2%	\$3.72	- 1.8%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System  
Five Weeks Ending 06/25/17



# Total US - Fresh Meat Feature and Promotion

June 2017

## Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	5/22/17 - 6/25/17	% Change	WE 6/25/17	% Change	WE 6/25/17	% Change
<b>TOTAL MEAT</b>	<b>1,236,256</b>	<b>4.3%</b>	<b>3,232,830</b>	<b>8.8%</b>	<b>12,955,489</b>	<b>7.6%</b>
Beef	495,585	-0.5%	1,298,105	6.7%	5,262,850	6.9%
Chicken	344,621	10.3%	851,141	8.9%	3,298,031	10.1%
Lamb	14,890	-29.1%	63,725	18.3%	234,410	-15.5%
Pork	306,350	3.0%	771,140	1.9%	3,043,770	4.3%
Turkey	67,510	29.9%	230,349	53.9%	1,049,198	20.3%
Veal	7,300	70.2%	18,370	42.8%	67,230	20.3%

## Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	5/22/17 - 6/25/17	% Change	WE 6/25/17	% Change	WE 6/25/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	40.1%	-1.9%	40.2%	-0.8%	40.6%	-0.3%
Chicken	27.9%	1.5%	26.3%	0.0%	25.5%	0.6%
Lamb	1.2%	-0.6%	2.0%	0.2%	1.8%	-0.5%
Pork	24.8%	-0.3%	23.9%	-1.6%	23.5%	-0.7%
Turkey	5.5%	1.1%	7.1%	2.1%	8.1%	0.9%
Veal	0.6%	0.2%	0.6%	0.1%	0.5%	0.1%

## Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	5/22/17 - 6/25/17	% Change	WE 6/25/17	% Change	WE 6/25/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.95</b>	<b>-3.1%</b>	<b>\$ 3.90</b>	<b>-1.8%</b>	<b>\$ 3.83</b>	<b>-4.7%</b>
Beef	\$ 5.60	-2.3%	\$ 5.50	-1.4%	\$ 5.38	-6.2%
Chicken	\$ 2.70	4.4%	\$ 2.64	3.1%	\$ 2.61	1.1%
Lamb	\$ 7.35	4.7%	\$ 6.90	1.8%	\$ 6.94	1.0%
Pork	\$ 2.60	-5.2%	\$ 2.54	-5.1%	\$ 2.55	-4.0%
Turkey	\$ 3.32	-3.4%	\$ 2.96	-14.5%	\$ 2.68	0.8%
Veal	\$ 7.12	-4.8%	\$ 7.42	-4.2%	\$ 7.31	-11.1%

## Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	5/22/17 - 6/25/17		WE 6/25/17		WE 6/25/17	
<b>TOTAL MEAT</b>	<b>28.3%</b>	<b>\$ 3.03</b>	<b>28.2%</b>	<b>\$ 3.03</b>	<b>29.0%</b>	<b>\$ 2.81</b>
Beef	30.3%	\$ 4.45	30.6%	\$ 4.46	31.3%	\$ 4.40
Chicken	23.1%	\$ 1.91	22.8%	\$ 1.92	22.8%	\$ 1.89
Lamb	32.1%	\$ 2.24	31.5%	\$ 2.24	31.7%	\$ 2.24
Pork	25.1%	\$ 2.96	22.8%	\$ 2.60	31.8%	\$ 1.39
Turkey	13.1%	\$ 6.39	22.1%	\$ 5.49	19.9%	\$ 5.84
Veal	15.9%	\$ 6.02	13.1%	\$ 6.27	15.6%	\$ 6.35

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

