

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

1. **Dollar Sales:** July beef dollar sales increased (+2.5%) versus the prior year. Chicken dollar sales increased (+3.9%) while pork dollar sales decreased (-1.7%). July total meat category dollar sales increased (+2.0%).
2. **Pound Sales:** July beef pound sales versus a year ago increased (+1.4%) and the total meat category increased (+1.4%). Chicken pound sales increased (+1.8%) versus a year ago and pork pounds increased (+0.2%).
3. **Average Price:** July's average price per pound for beef increased seasonally (+1.1%) versus a year ago to \$4.97/lb., and up from June's average price of \$4.95/lb. Chicken price increased (+2.1%) and pork price decreased (-1.9%). Beef's average price per pound for the latest 52 weeks decreased (-5.0%), less than June's 52-week decrease (-5.8%).
4. **Feature Activity and Share:** July beef retail feature activity decreased (-2.2%). Ad activity increased for chicken (+4.4%) but decreased for pork (-1.0%). Beef ad share decreased (-0.3%) for the latest 52-week period but it remains the most featured protein (40.6%) across all meat ads compared to chicken (25.6%) and pork (23.5%).
5. **Feature Price:** Average total meat feature price increased (+0.7%) in July. The average feature price increased for beef (+2.5%) and chicken (+4.2%) and decreased for pork (-4.6%). Beef volume sold on feature represented 28.1% of total July beef pound sales, a decrease from 31.1% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

July 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/26/17-07/23/17	% Change	WE 07/23/17	% Change	WE 07/23/17	% Change
TOTAL MEAT	\$3,794,240,007	+ 2.0%	\$12,159,865,057	+ 1.6%	\$48,535,991,931	- 0.6%
Beef	\$1,972,147,661	+ 2.5%	\$6,291,314,980	+ 1.8%	\$24,171,513,632	- 1.1%
Chicken	\$978,566,515	+ 3.9%	\$3,159,785,753	+ 4.2%	\$12,197,150,488	+ 3.1%
Pork	\$624,459,398	- 1.7%	\$1,981,884,066	- 2.4%	\$8,265,862,615	- 4.3%
Turkey	\$141,844,185	+ 1.2%	\$475,118,279	+ 0.7%	\$2,840,800,507	0.0%
Lamb	\$27,385,188	- 1.7%	\$91,278,658	- 4.2%	\$403,384,386	- 0.9%
Veal	\$4,147,370	- 3.2%	\$14,685,809	- 2.9%	\$66,362,421	- 7.1%
Other*	\$45,689,691	+ 0.1%	\$145,797,513	- 0.4%	\$590,917,881	+ 2.7%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/26/17-07/23/17	% Change	WE 07/23/17	% Change	WE 07/23/17	% Change
TOTAL MEAT	1,099,618,189	+ 1.4%	3,543,970,418	+ 1.6%	15,013,714,457	+ 1.9%
Beef	396,475,206	+ 1.4%	1,274,870,382	+ 2.3%	5,069,439,465	+ 4.1%
Chicken	414,630,148	+ 1.8%	1,335,124,273	+ 1.9%	5,175,524,598	+ 2.1%
Pork	229,491,944	+ 0.2%	737,231,642	- 0.2%	3,199,160,036	- 1.3%
Turkey	42,805,111	+ 4.4%	143,306,427	+ 3.0%	1,343,959,634	+ 1.3%
Lamb	3,549,315	- 7.2%	12,188,988	- 8.8%	56,915,951	- 0.9%
Veal	581,191	- 4.5%	2,066,025	- 3.6%	9,578,100	- 5.5%
Other*	12,085,274	+ 1.2%	39,182,680	0.0%	159,136,674	+ 4.6%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/26/17-07/23/17	% Change	WE 07/23/17	% Change	WE 07/23/17	% Change
TOTAL MEAT	\$3.45	+ 0.7%	\$3.43	0.0%	\$3.23	- 2.5%
Beef	\$4.97	+ 1.1%	\$4.93	- 0.5%	\$4.77	- 5.0%
Chicken	\$2.36	+ 2.1%	\$2.37	+ 2.2%	\$2.36	+ 1.0%
Pork	\$2.72	- 1.9%	\$2.69	- 2.2%	\$2.58	- 3.1%
Turkey	\$3.31	- 3.1%	\$3.32	- 2.2%	\$2.11	- 1.3%
Lamb	\$7.72	+ 5.9%	\$7.49	+ 5.0%	\$7.09	- 0.1%
Veal	\$7.14	+ 1.4%	\$7.11	+ 0.7%	\$6.93	- 1.6%
Other*	\$3.78	- 1.0%	\$3.72	- 0.4%	\$3.71	- 1.8%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 07/23/17



Total US - Fresh Meat Feature and Promotion

July 2017

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/26/17 - 7/23/17	% Change	WE 7/23/17	% Change	WE 7/23/17	% Change
TOTAL MEAT	964,748	-1.1%	3,196,836	5.2%	12,945,194	6.8%
Beef	385,070	-2.2%	1,296,395	4.0%	5,254,200	5.9%
Chicken	279,053	4.4%	890,715	10.7%	3,309,773	9.8%
Lamb	9,665	-36.6%	35,680	-33.1%	228,820	-17.3%
Pork	240,930	-1.0%	786,030	2.4%	3,041,435	3.8%
Turkey	45,100	-13.5%	170,496	10.9%	1,042,136	18.1%
Veal	4,930	48.0%	17,520	40.0%	68,830	24.1%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/26/17 - 7/23/17	% Change	WE 7/23/17	% Change	WE 7/23/17	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	39.9%	-0.5%	40.6%	-0.5%	40.6%	-0.3%
Chicken	28.9%	1.5%	27.9%	1.4%	25.6%	0.7%
Lamb	1.0%	-0.6%	1.1%	-0.6%	1.8%	-0.5%
Pork	25.0%	0.0%	24.6%	-0.7%	23.5%	-0.7%
Turkey	4.7%	-0.7%	5.3%	0.3%	8.1%	0.8%
Veal	0.5%	0.2%	0.5%	0.1%	0.5%	0.1%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/26/17 - 7/23/17	% Change	WE 7/23/17	% Change	WE 7/23/17	% Change
TOTAL MEAT	\$ 3.98	0.7%	\$ 3.95	-1.5%	\$ 3.83	-4.3%
Beef	\$ 5.65	2.5%	\$ 5.57	-0.8%	\$ 5.39	-5.3%
Chicken	\$ 2.79	4.2%	\$ 2.71	4.1%	\$ 2.62	0.9%
Lamb	\$ 7.29	10.5%	\$ 7.37	8.0%	\$ 6.98	2.3%
Pork	\$ 2.58	-4.6%	\$ 2.56	-5.4%	\$ 2.54	-3.9%
Turkey	\$ 3.55	-0.3%	\$ 3.39	-3.8%	\$ 2.67	0.1%
Veal	\$ 7.45	-3.7%	\$ 7.23	-4.7%	\$ 7.30	-10.6%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/26/17 - 7/23/17		WE 7/23/17		WE 7/23/17	
TOTAL MEAT	26.6%	\$ 3.04	27.9%	\$ 3.03	28.9%	\$ 2.81
Beef	28.1%	\$ 4.46	29.7%	\$ 4.48	31.1%	\$ 4.39
Chicken	22.2%	\$ 1.96	23.1%	\$ 1.92	22.8%	\$ 1.90
Lamb	31.3%	\$ 2.30	32.1%	\$ 2.26	31.6%	\$ 2.24
Pork	19.8%	\$ 2.89	22.2%	\$ 2.95	31.9%	\$ 1.40
Turkey	12.0%	\$ 6.23	13.9%	\$ 6.00	19.7%	\$ 5.85
Veal	14.2%	\$ 6.08	13.5%	\$ 5.98	15.5%	\$ 6.33

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

