

**Retail Beef Performance**  
**IRI/Freshlook Marketing and USDA Market News**  
**August 2016 Highlights**

1. **Dollar Sales:** August beef dollar sales decreased (-6.7%) versus the prior year. Chicken dollar sales decreased (-1.0%) while pork dollar sales decreased (-9.2%). The decline in August Beef dollar sales was greater than the decrease in total meat category dollar sales (-5.2%).
2. **Pound Sales:** August beef pound sales versus a year ago increased (+3.1%) while the total meat category increased (+1.1%). Chicken pound sales increased (+1.8%) versus a year ago while pork pounds decreased (-4.4%).
3. **Average Price:** August's average price per pound for beef decreased (-9.5%) versus a year ago to \$4.93/lb., up slightly from July's average price of \$4.92/lb. Chicken price decreased (-0.1%) and pork price decreased (-4.3%). Beef's average price per pound for the latest 52 weeks decreased (-6.7%) compared to July's 52-week decrease (-5.6%).
4. **Feature Activity and Share:** August beef retail feature activity increased (+10.9%). Ad activity increased for chicken (+1.3%) and pork (+7.7%). Beef ad share increased (+3.1%) for the latest 52-week period and it remains the most featured protein (41.0%) of all meat ads compared to chicken (24.8%) and pork (24.2%).
5. **Feature Price:** Average total meat feature price decreased (-5.3%) in August. The average feature price decreased for beef (-9.3%) and pork (-6.1%), and increased for chicken (+7.5%). Beef volume sold on feature represented 30.6% of total August beef pound sales.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

August 2016

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/25/16-08/21/16	% Change	WE 08/21/16	% Change	WE 08/21/16	% Change
<b>TOTAL MEAT</b>	<b>\$3,509,039,910</b>	<b>- 5.2%</b>	<b>\$11,871,766,542</b>	<b>- 2.8%</b>	<b>\$48,613,925,483</b>	<b>- 1.4%</b>
Beef	\$1,791,381,767	- 6.7%	\$6,128,843,607	- 3.3%	\$24,310,107,282	- 0.8%
Chicken	\$926,432,109	- 1.0%	\$3,028,692,331	+ 0.2%	\$11,824,154,108	+ 1.2%
Pork	\$570,779,993	- 9.2%	\$1,999,700,467	- 7.0%	\$8,583,608,133	- 6.9%
Turkey	\$145,403,574	- 0.4%	\$463,054,606	+ 0.4%	\$2,839,746,386	+ 0.5%
Lamb	\$27,241,106	- 1.8%	\$91,292,111	+ 0.7%	\$406,663,452	+ 2.9%
Veal	\$4,375,595	- 13.2%	\$14,263,041	- 10.8%	\$70,738,468	- 10.1%
Other*	\$43,425,766	+ 8.1%	\$145,920,380	+ 11.4%	\$578,907,653	+ 1.0%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/25/16-08/21/16	% Change	WE 08/21/16	% Change	WE 08/21/16	% Change
<b>TOTAL MEAT</b>	<b>1,026,192,918</b>	<b>+ 1.1%</b>	<b>3,460,285,780</b>	<b>+ 2.5%</b>	<b>14,738,062,147</b>	<b>+ 3.3%</b>
Beef	363,554,794	+ 3.1%	1,239,261,376	+ 6.3%	4,880,966,554	+ 6.3%
Chicken	400,524,159	+ 1.8%	1,312,620,028	+ 1.8%	5,076,885,398	+ 2.5%
Pork	202,002,312	- 4.4%	717,356,881	- 2.6%	3,231,560,397	+ 2.3%
Turkey	43,876,952	+ 1.5%	137,045,218	+ 1.1%	1,327,337,840	- 0.7%
Lamb	3,703,259	+ 0.9%	12,602,579	+ 4.2%	57,447,508	+ 5.1%
Veal	619,582	- 8.1%	2,017,761	- 6.1%	10,085,316	- 11.1%
Other*	11,911,861	+ 15.7%	39,381,938	+ 16.2%	153,779,135	+ 0.3%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/25/16-08/21/16	% Change	WE 08/21/16	% Change	WE 08/21/16	% Change
<b>TOTAL MEAT</b>	<b>\$3.42</b>	<b>- 6.2%</b>	<b>\$3.43</b>	<b>- 5.1%</b>	<b>\$3.30</b>	<b>- 4.6%</b>
Beef	\$4.93	- 9.5%	\$4.95	- 9.0%	\$4.98	- 6.7%
Chicken	\$2.31	- 2.7%	\$2.31	- 1.6%	\$2.33	- 1.3%
Pork	\$2.83	- 5.0%	\$2.79	- 4.5%	\$2.66	- 9.0%
Turkey	\$3.31	- 1.9%	\$3.38	- 0.7%	\$2.14	+ 1.2%
Lamb	\$7.36	- 2.7%	\$7.24	- 3.3%	\$7.08	- 2.2%
Veal	\$7.06	- 5.6%	\$7.07	- 5.0%	\$7.01	+ 1.1%
Other*	\$3.65	- 6.6%	\$3.71	- 4.1%	\$3.76	+ 0.7%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 08/21/16



# Total US - Fresh Meat Feature and Promotion

August 2016

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/25/16 - 8/21/16	% Change	WE 8/21/16	% Change	WE 8/21/16	% Change
<b>TOTAL MEAT</b>	<b>951,364</b>	<b>8.0%</b>	<b>3,111,873</b>	<b>4.8%</b>	<b>12,188,951</b>	<b>-0.6%</b>
Beef	393,800	10.9%	1,285,620	8.0%	4,998,900	7.6%
Chicken	252,749	1.3%	832,609	1.5%	3,016,917	-10.0%
Lamb	14,240	-10.7%	50,495	-0.4%	274,865	7.4%
Pork	235,810	7.7%	776,615	3.2%	2,946,660	2.6%
Turkey	51,470	43.4%	155,619	10.8%	898,339	-17.5%
Veal	3,295	-40.1%	10,915	-21.7%	53,270	5.8%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/25/16 - 8/21/16	% Change	WE 8/21/16	% Change	WE 8/21/16	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	41.4%	1.1%	41.3%	1.2%	41.0%	3.1%
Chicken	26.6%	-1.8%	26.8%	-0.9%	24.8%	-2.6%
Lamb	1.5%	-0.3%	1.6%	-0.1%	2.3%	0.2%
Pork	24.8%	-0.1%	25.0%	-0.4%	24.2%	0.8%
Turkey	5.4%	1.3%	5.0%	0.3%	7.4%	-1.5%
Veal	0.3%	-0.3%	0.4%	-0.1%	0.4%	0.0%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/25/16 - 8/21/16	% Change	WE 8/21/16	% Change	WE 8/21/16	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.99</b>	<b>-5.3%</b>	<b>\$ 4.01</b>	<b>-4.5%</b>	<b>\$ 3.99</b>	<b>-4.0%</b>
Beef	\$ 5.51	-9.3%	\$ 5.59	-8.1%	\$ 5.65	-6.4%
Chicken	\$ 2.78	7.5%	\$ 2.68	6.1%	\$ 2.61	-2.8%
Lamb	\$ 6.98	-1.2%	\$ 6.88	-5.5%	\$ 6.82	-6.0%
Pork	\$ 2.65	-6.1%	\$ 2.70	-5.5%	\$ 2.63	-11.9%
Turkey	\$ 3.40	-6.6%	\$ 3.47	-5.1%	\$ 2.67	-3.1%
Veal	\$ 8.28	-10.1%	\$ 7.80	-13.6%	\$ 8.07	-5.9%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/25/16 - 8/21/16		WE 8/21/16		WE 8/21/16	
<b>TOTAL MEAT</b>	<b>28.3%</b>	<b>\$ 3.08</b>	<b>28.5%</b>	<b>\$ 3.08</b>	<b>29.0%</b>	<b>\$ 2.86</b>
Beef	30.6%	\$ 4.72	30.7%	\$ 4.64	30.8%	\$ 4.67
Chicken	23.4%	\$ 1.84	23.5%	\$ 1.87	24.0%	\$ 1.85
Lamb	31.3%	\$ 2.40	31.9%	\$ 2.34	31.9%	\$ 2.32
Pork	22.5%	\$ 2.77	20.2%	\$ 2.91	29.8%	\$ 1.38
Turkey	18.4%	\$ 6.62	18.5%	\$ 6.18	20.9%	\$ 5.85
Veal	16.6%	\$ 6.60	16.2%	\$ 6.61	15.4%	\$ 6.54

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

