

Retail Beef Performance
IRI/Freshlook Marketing and USDA Market News
April 2018 Highlights

1. **Dollar Sales:** April beef dollar sales increased (+6.9%) versus the prior year. Chicken dollar sales increased (+9.0%) while pork dollar sales decreased (-19.8%), driven by the earlier Easter holiday. April total meat category dollar sales increased (+0.8%).
2. **Pound Sales:** April beef pound sales versus a year ago increased (+6.1%) and the total meat category decreased (-4.9%). Chicken pound sales increased (+6.2%) versus a year ago and pork pounds increased (-28.7%).
3. **Average Price:** April's average price per pound for beef increased (+0.7%) versus a year ago to \$4.86/lb., up from March's average price of \$4.72/lb. Chicken price increased (+2.6%) whereas pork price increased (+12.4%). Beef's average price per pound for the latest 52 weeks increased (+1.9%), up from March's 52-week increase (+1.7%).
4. **Feature Activity and Share:** April beef retail feature activity increased (+2.3%). Ad activity increased for chicken (+4.7%) and pork (+7.7%) as featuring activity for all meat and poultry declined (-3.7%). Beef ad share increased (+2.4%) for April, yet it remains the most featured protein (40.5%) across all meat ads compared to chicken (27.2%) and pork (24.9%).
5. **Feature Price:** Average total meat feature price increased (+0.2%) in April. The average feature price for beef decreased (-2.5%). It increased for chicken (+1.2%) and for pork (+1.8%). Beef volume sold on feature represented 28.4% of total April beef pound sales, below the 29.6% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

April 2018

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/02/18-04/29/18	% Change	WE 04/29/18	% Change	WE 04/29/18	% Change
TOTAL MEAT	\$3,801,592,956	+ 0.8%	\$12,640,863,746	+ 6.0%	\$50,158,873,010	+ 3.4%
Beef	\$1,940,699,336	+ 6.9%	\$6,465,851,990	+ 7.6%	\$25,274,011,128	+ 4.6%
Chicken	\$1,016,967,091	+ 9.0%	\$3,293,074,225	+ 6.8%	\$12,712,646,128	+ 5.1%
Pork	\$595,733,643	- 19.8%	\$2,030,390,081	+ 0.7%	\$8,279,138,473	- 0.8%
Turkey	\$164,703,200	- 6.5%	\$565,224,449	+ 4.4%	\$2,827,009,899	- 0.7%
Lamb	\$33,335,187	- 36.5%	\$118,699,986	0.0%	\$403,795,230	- 0.7%
Veal	\$5,164,276	+ 5.3%	\$17,385,759	- 0.2%	\$63,962,247	- 4.9%
Other*	\$44,990,224	+ 2.0%	\$150,237,257	+ 5.0%	\$598,309,906	+ 1.5%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/02/18-04/29/18	% Change	WE 04/29/18	% Change	WE 04/29/18	% Change
TOTAL MEAT	1,110,605,313	- 4.9%	3,730,953,320	+ 3.2%	15,260,080,088	+ 1.3%
Beef	399,451,937	+ 6.1%	1,356,041,485	+ 5.3%	5,219,468,963	+ 2.7%
Chicken	414,815,046	+ 6.2%	1,340,977,441	+ 3.3%	5,268,064,588	+ 1.6%
Pork	227,564,283	- 28.7%	790,818,144	- 0.8%	3,190,068,536	- 1.1%
Turkey	52,030,813	- 15.1%	186,507,505	+ 6.7%	1,363,729,331	+ 1.2%
Lamb	4,519,385	- 44.0%	16,088,011	- 7.7%	53,877,101	- 7.8%
Veal	732,656	+ 6.8%	2,535,206	+ 3.0%	9,299,571	- 3.5%
Other*	11,491,194	- 0.3%	37,985,527	- 0.6%	155,571,999	- 1.5%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/02/18-04/29/18	% Change	WE 04/29/18	% Change	WE 04/29/18	% Change
TOTAL MEAT	\$3.42	+ 6.0%	\$3.39	+ 2.7%	\$3.29	+ 2.1%
Beef	\$4.86	+ 0.7%	\$4.77	+ 2.2%	\$4.84	+ 1.9%
Chicken	\$2.45	+ 2.6%	\$2.46	+ 3.3%	\$2.41	+ 3.5%
Pork	\$2.62	+ 12.4%	\$2.57	+ 1.6%	\$2.60	+ 0.3%
Turkey	\$3.17	+ 10.0%	\$3.03	- 2.2%	\$2.07	- 1.9%
Lamb	\$7.38	+ 13.5%	\$7.38	+ 8.3%	\$7.49	+ 7.7%
Veal	\$7.05	- 1.4%	\$6.86	- 3.1%	\$6.88	- 1.5%
Other*	\$3.92	+ 2.4%	\$3.96	+ 5.6%	\$3.85	+ 3.1%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 04/29/18



Total US - Fresh Meat Feature and Promotion

April 2018

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/2/18 - 4/29/18	% Change	WE 4/29/18	% Change	WE 4/29/18	% Change
TOTAL MEAT	972,914	-3.7%	3,085,343	-4.0%	12,487,719	-2.5%
Beef	394,240	2.3%	1,254,840	-4.2%	5,037,095	-3.4%
Chicken	265,060	4.7%	813,881	-4.0%	3,336,626	2.9%
Lamb	12,520	-65.4%	58,680	-13.8%	181,495	-25.8%
Pork	241,970	7.7%	729,640	-1.4%	2,829,245	-6.3%
Turkey	52,284	-50.8%	210,097	-8.5%	1,037,993	0.7%
Veal	6,840	37.3%	18,205	-0.3%	65,265	2.7%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/2/18 - 4/29/18	% Change	WE 4/29/18	% Change	WE 4/29/18	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	40.5%	2.4%	40.7%	-0.1%	40.3%	-0.3%
Chicken	27.2%	2.2%	26.4%	0.0%	26.7%	1.4%
Lamb	1.3%	-2.3%	1.9%	-0.2%	1.5%	-0.5%
Pork	24.9%	2.6%	23.6%	0.6%	22.7%	-0.9%
Turkey	5.4%	-5.1%	6.8%	-0.3%	8.3%	0.3%
Veal	0.7%	0.2%	0.6%	0.0%	0.5%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/2/18 - 4/29/18	% Change	WE 4/29/18	% Change	WE 4/29/18	% Change
TOTAL MEAT	\$ 3.79	0.2%	\$ 3.84	1.4%	\$ 3.86	0.4%
Beef	\$ 5.26	-2.5%	\$ 5.31	0.7%	\$ 5.44	0.8%
Chicken	\$ 2.59	1.2%	\$ 2.69	6.1%	\$ 2.73	5.4%
Lamb	\$ 6.96	5.2%	\$ 7.07	4.5%	\$ 7.24	4.8%
Pork	\$ 2.52	1.8%	\$ 2.49	0.9%	\$ 2.53	-1.2%
Turkey	\$ 3.49	38.7%	\$ 2.93	0.1%	\$ 2.59	-3.5%
Veal	\$ 7.44	-0.3%	\$ 7.21	-3.1%	\$ 7.27	-1.8%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/2/18 - 4/29/18		WE 4/29/18		WE 4/29/18	
TOTAL MEAT	27.0%	\$ 2.90	27.4%	\$ 2.98	27.7%	\$ 2.82
Beef	28.4%	\$ 4.25	29.8%	\$ 4.27	29.6%	\$ 4.43
Chicken	22.1%	\$ 1.89	22.4%	\$ 1.92	22.2%	\$ 1.93
Lamb	32.3%	\$ 2.18	30.6%	\$ 2.25	30.4%	\$ 2.24
Pork	24.6%	\$ 2.64	22.0%	\$ 2.36	31.1%	\$ 1.34
Turkey	20.9%	\$ 5.73	22.4%	\$ 5.78	17.9%	\$ 6.02
Veal	24.0%	\$ 6.57	17.8%	\$ 5.83	15.4%	\$ 5.83

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



Funded by Beef Farmers and Ranchers