

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

1. **Dollar Sales:** May beef dollar sales increased (+7.1%) versus the prior year. Chicken dollar sales increased (+4.8%) while pork dollar sales increased (+0.2%). May total meat category dollar sales increased (+5.1%).
2. **Pound Sales:** May beef pound sales versus a year ago increased (+4.8%) and the total meat category increased (+2.4%). Chicken pound sales increased (+1.9%) versus a year ago and pork pounds decreased (-1.0%).
3. **Average Price:** May's average price per pound for beef increased (+2.2%) versus a year ago to \$4.97/lb., up seasonally from April's average price of \$4.86/lb. Chicken price increased (+2.8%) whereas pork price increased (+1.2%). Beef's average price per pound for the latest 52 weeks increased (+2.2%), up from April's 52-week increase (+1.9%).
4. **Feature Activity and Share:** May beef retail feature activity decreased (-1.1%). Ad activity increased for chicken (+1.2%) and pork (+0.2%) as featuring activity for all meat and poultry declined (-0.7%). Beef ad share decreased (-0.2%) for May, yet it remains the most featured protein (42.5%) across all meat ads compared to chicken (25.7%) and pork (25.1%).
5. **Feature Price:** Average total meat feature price decreased (-0.9%) in May. The average feature price for beef decreased (-2.1%). It increased for chicken (+3.4%) and decreased for pork (-1.1%). Beef volume sold on feature represented 30.9% of total May beef pound sales, above the 29.5% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

May 2018

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/30/18-05/27/18	% Change	WE 05/27/18	% Change	WE 05/27/18	% Change
TOTAL MEAT	\$3,999,004,706	+ 5.1%	\$12,824,259,376	+ 6.1%	\$50,354,594,043	+ 3.7%
Beef	\$2,105,817,690	+ 7.1%	\$6,610,225,060	+ 7.9%	\$25,412,971,693	+ 5.1%
Chicken	\$1,027,654,583	+ 4.8%	\$3,287,925,037	+ 6.4%	\$12,759,607,170	+ 5.1%
Pork	\$628,144,205	+ 0.2%	\$2,088,822,421	+ 1.3%	\$8,280,626,524	- 0.6%
Turkey	\$155,639,013	+ 3.3%	\$551,256,991	+ 4.2%	\$2,831,957,272	- 0.5%
Lamb	\$29,333,769	+ 1.1%	\$119,689,582	+ 0.8%	\$404,114,988	- 0.4%
Veal	\$4,649,678	- 4.3%	\$16,643,285	+ 0.8%	\$63,754,804	- 4.9%
Other*	\$47,765,768	+ 7.3%	\$149,696,999	+ 5.2%	\$601,561,593	+ 2.1%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/30/18-05/27/18	% Change	WE 05/27/18	% Change	WE 05/27/18	% Change
TOTAL MEAT	1,145,274,037	+ 2.4%	3,758,293,336	+ 3.3%	15,287,149,082	+ 1.3%
Beef	423,510,602	+ 4.8%	1,366,137,638	+ 5.4%	5,238,888,066	+ 2.9%
Chicken	420,785,013	+ 1.9%	1,338,254,349	+ 3.1%	5,275,891,177	+ 1.6%
Pork	236,869,257	- 1.0%	817,038,905	+ 0.1%	3,187,770,432	- 1.2%
Turkey	47,410,840	+ 4.3%	180,126,531	+ 6.0%	1,365,670,646	+ 1.3%
Lamb	3,712,717	- 5.2%	16,155,615	- 6.3%	53,672,918	- 7.6%
Veal	651,627	- 4.1%	2,365,248	+ 1.7%	9,271,677	- 3.4%
Other*	12,333,979	+ 3.5%	38,215,049	+ 0.8%	155,984,167	- 1.3%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/30/18-05/27/18	% Change	WE 05/27/18	% Change	WE 05/27/18	% Change
TOTAL MEAT	\$3.49	+ 2.7%	\$3.41	+ 2.7%	\$3.29	+ 2.3%
Beef	\$4.97	+ 2.2%	\$4.84	+ 2.3%	\$4.85	+ 2.2%
Chicken	\$2.44	+ 2.8%	\$2.46	+ 3.2%	\$2.42	+ 3.5%
Pork	\$2.65	+ 1.2%	\$2.56	+ 1.1%	\$2.60	+ 0.6%
Turkey	\$3.28	- 0.9%	\$3.06	- 1.7%	\$2.07	- 1.8%
Lamb	\$7.90	+ 6.7%	\$7.41	+ 7.6%	\$7.53	+ 7.8%
Veal	\$7.14	- 0.2%	\$7.04	- 0.9%	\$6.88	- 1.6%
Other*	\$3.87	+ 3.7%	\$3.92	+ 4.4%	\$3.86	+ 3.5%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 05/27/18



Funded by Beef Farmers and Ranchers

Total US - Fresh Meat Feature and Promotion

May 2018

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/30/18 - 5/27/18	% Change	WE 5/27/18	% Change	WE 5/27/18	% Change
TOTAL MEAT	987,987	-0.7%	3,135,815	-3.1%	12,481,229	-3.5%
Beef	419,460	-1.1%	1,298,820	-2.3%	5,032,515	-4.6%
Chicken	253,568	1.2%	811,540	-2.9%	3,339,680	2.2%
Lamb	9,825	-15.2%	57,825	-9.9%	179,735	-25.3%
Pork	248,370	0.2%	737,330	-3.1%	2,829,625	-7.0%
Turkey	50,949	-7.8%	211,725	-7.6%	1,033,684	-0.3%
Veal	5,815	14.2%	18,575	6.1%	65,990	2.0%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/30/18 - 5/27/18	% Change	WE 5/27/18	% Change	WE 5/27/18	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	42.5%	-0.2%	41.4%	0.4%	40.3%	-0.5%
Chicken	25.7%	0.5%	25.9%	0.0%	26.8%	1.5%
Lamb	1.0%	-0.2%	1.8%	-0.1%	1.4%	-0.4%
Pork	25.1%	0.2%	23.5%	0.0%	22.7%	-0.9%
Turkey	5.2%	-0.4%	6.8%	-0.3%	8.3%	0.3%
Veal	0.6%	0.1%	0.6%	0.1%	0.5%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/30/18 - 5/27/18	% Change	WE 5/27/18	% Change	WE 5/27/18	% Change
TOTAL MEAT	\$ 3.97	-0.9%	\$ 3.88	0.8%	\$ 3.85	0.3%
Beef	\$ 5.53	-2.1%	\$ 5.38	-0.2%	\$ 5.43	0.7%
Chicken	\$ 2.69	3.4%	\$ 2.65	3.0%	\$ 2.74	5.2%
Lamb	\$ 7.34	-0.4%	\$ 7.11	4.9%	\$ 7.24	4.5%
Pork	\$ 2.51	-1.1%	\$ 2.50	0.5%	\$ 2.53	-1.0%
Turkey	\$ 3.56	7.0%	\$ 2.98	0.7%	\$ 2.59	-3.0%
Veal	\$ 7.06	1.6%	\$ 7.11	-1.9%	\$ 7.27	-1.0%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/30/18 - 5/27/18		WE 5/27/18		WE 5/27/18	
TOTAL MEAT	28.6%	\$ 3.06	27.6%	\$ 3.00	27.6%	\$ 2.82
Beef	30.9%	\$ 4.50	30.0%	\$ 4.31	29.5%	\$ 4.42
Chicken	22.1%	\$ 1.93	21.9%	\$ 1.93	22.1%	\$ 1.93
Pork	34.3%	\$ 2.21	31.4%	\$ 2.22	30.3%	\$ 2.24
Turkey	24.4%	\$ 2.85	23.3%	\$ 2.44	31.2%	\$ 1.34
Lamb	13.6%	\$ 6.82	21.9%	\$ 5.80	18.0%	\$ 6.06
Veal	15.0%	\$ 5.73	17.7%	\$ 6.24	15.7%	\$ 5.82

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



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