

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

1. **Dollar Sales:** October beef dollar sales decreased (-4.1%) versus the prior year. Chicken dollar sales increased (+1.2%) while pork dollar sales decreased (-8.0%). The decline in October Beef dollar sales was greater than the decrease in total meat category dollar sales (-3.2%).
2. **Pound Sales:** October beef pound sales versus a year ago increased (+5.0%) while the total meat category increased (+1.5%). Chicken pound sales increased (+0.9%) versus a year ago while pork pounds decreased (-4.1%).
3. **Average Price:** October's average price per pound for beef decreased (-8.6%) versus a year ago to \$4.69/lb., down from September's average price of \$4.79/lb. Chicken price increased (+0.3%) and pork price decreased (-4.1%). Beef's average price per pound for the latest 52 weeks decreased (-7.7%) compared to September's 52-week decrease (-5.1%).
4. **Feature Activity and Share:** October beef retail feature activity increased (+3.9%). Ad activity increased for chicken (+4.9%) and pork (+7.4%). Beef ad share increased (+5.1%) for the latest 52-week period and it remains the most featured protein (41.0%) of all meat ads compared to chicken (24.6%) and pork (24.1%).
5. **Feature Price:** Average total meat feature price decreased (-5.6%) in October. The average feature price decreased for beef (-6.6%), pork (-6.9%) but increased for chicken (+3.5%). Beef volume sold on feature represented 31.1% of total October beef pound sales compared to 31.5% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

October 2016

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/26/16-10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	\$3,613,524,804	- 3.2%	\$11,673,062,541	- 3.7%	\$48,362,544,244	- 2.4%
Beef	\$1,853,556,805	- 4.1%	\$5,966,618,306	- 5.1%	\$24,113,878,544	- 2.6%
Chicken	\$933,523,901	+ 1.2%	\$3,048,348,225	+ 1.2%	\$11,869,038,589	+ 1.2%
Pork	\$584,205,792	- 8.0%	\$1,912,180,819	- 7.8%	\$8,479,736,630	- 7.7%
Turkey	\$165,178,036	- 0.1%	\$498,896,412	- 0.2%	\$2,839,065,009	+ 0.5%
Lamb	\$27,117,941	- 0.4%	\$88,724,735	- 0.5%	\$406,752,561	+ 2.5%
Veal	\$5,455,054	- 12.3%	\$15,864,886	- 11.5%	\$69,339,446	- 9.9%
Other*	\$44,487,274	+ 4.4%	\$142,429,158	+ 6.8%	\$584,733,464	+ 4.9%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/26/16-10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	1,081,024,416	+ 1.5%	3,457,288,364	+ 1.9%	14,792,340,193	+ 2.9%
Beef	395,129,395	+ 5.0%	1,243,414,168	+ 4.4%	4,922,870,086	+ 6.0%
Chicken	402,461,555	+ 0.9%	1,315,372,479	+ 2.1%	5,097,542,527	+ 2.5%
Pork	213,599,282	- 4.1%	690,831,155	- 3.5%	3,216,010,060	+ 0.2%
Turkey	53,424,460	+ 4.1%	154,852,718	+ 3.6%	1,332,022,216	+ 0.2%
Lamb	3,780,172	+ 2.2%	12,156,677	+ 1.5%	57,595,470	+ 5.1%
Veal	794,197	- 11.1%	2,256,441	- 9.7%	9,898,278	- 10.3%
Other*	11,835,354	+ 7.9%	38,404,726	+ 12.4%	156,401,556	+ 6.2%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/26/16-10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	\$3.34	- 4.6%	\$3.38	- 5.5%	\$3.27	- 5.1%
Beef	\$4.69	- 8.6%	\$4.80	- 9.2%	\$4.90	- 8.2%
Chicken	\$2.32	+ 0.3%	\$2.32	- 0.9%	\$2.33	- 1.2%
Pork	\$2.74	- 4.1%	\$2.77	- 4.5%	\$2.64	- 7.8%
Turkey	\$3.09	- 4.1%	\$3.22	- 3.7%	\$2.13	+ 0.3%
Lamb	\$7.17	- 2.6%	\$7.30	- 1.9%	\$7.06	- 2.5%
Veal	\$6.87	- 1.3%	\$7.03	- 2.1%	\$7.01	+ 0.4%
Other*	\$3.76	- 3.3%	\$3.71	- 5.0%	\$3.74	- 1.2%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 10/23/16



Total US - Fresh Meat Feature and Promotion

October 2016

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	9/26/16 - 10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	1,015,456	7.5%	3,214,833	6.4%	12,312,871	-0.4%
Beef	430,090	3.9%	1,346,580	6.9%	5,046,670	5.1%
Chicken	249,574	4.9%	824,418	2.0%	3,029,861	-6.8%
Lamb	13,660	-11.2%	47,270	-7.7%	272,610	4.3%
Pork	247,970	7.4%	793,940	5.7%	2,972,800	1.4%
Turkey	67,627	62.7%	186,755	40.0%	936,135	-11.9%
Veal	6,535	27.1%	15,870	-4.1%	54,795	3.8%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	9/26/16 - 10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	42.4%	-1.5%	41.9%	0.2%	41.0%	2.1%
Chicken	24.6%	-0.6%	25.6%	-1.1%	24.6%	-1.7%
Lamb	1.3%	-0.3%	1.5%	-0.2%	2.2%	0.1%
Pork	24.4%	0.0%	24.7%	-0.2%	24.1%	0.4%
Turkey	6.7%	2.3%	5.8%	1.4%	7.6%	-1.0%
Veal	0.6%	0.1%	0.5%	-0.1%	0.4%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	9/26/16 - 10/23/16	% Change	WE 10/23/16	% Change	WE 10/23/16	% Change
TOTAL MEAT	\$ 3.88	-5.6%	\$ 3.91	-5.9%	\$ 3.94	-4.8%
Beef	\$ 5.25	-6.6%	\$ 5.36	-8.9%	\$ 5.56	-7.3%
Chicken	\$ 2.69	3.5%	\$ 2.63	1.7%	\$ 2.61	-1.4%
Lamb	\$ 7.00	-0.8%	\$ 6.95	0.7%	\$ 6.83	-5.3%
Pork	\$ 2.57	-6.9%	\$ 2.62	-5.3%	\$ 2.60	-10.3%
Turkey	\$ 3.47	-3.0%	\$ 3.49	-2.0%	\$ 2.70	-0.8%
Veal	\$ 7.16	-21.5%	\$ 7.36	-14.3%	\$ 7.81	-8.3%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	9/26/16 - 10/23/16		WE 10/23/16		WE 10/23/16	
TOTAL MEAT	28.7%	\$ 2.97	28.9%	\$ 3.00	29.4%	\$ 2.85
Beef	31.1%	\$ 4.31	31.6%	\$ 4.45	31.5%	\$ 4.57
Chicken	23.4%	\$ 1.90	23.3%	\$ 1.85	23.7%	\$ 1.86
Lamb	32.8%	\$ 2.26	32.6%	\$ 2.29	32.0%	\$ 2.30
Pork	21.2%	\$ 2.39	21.4%	\$ 2.61	30.4%	\$ 1.39
Turkey	17.7%	\$ 5.91	17.1%	\$ 6.33	21.4%	\$ 5.84
Veal	22.1%	\$ 7.07	17.7%	\$ 7.08	15.7%	\$ 6.68

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

