

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

1. **Dollar Sales:** November beef dollar sales decreased (-4.6%) versus the prior year. Chicken dollar sales increased (+1.2%) while pork dollar sales decreased (-5.5%). The decline in November Beef dollar sales was greater than the decrease in total meat category dollar sales (-3.2%).
2. **Pound Sales:** November beef pound sales versus a year ago increased (+2.5%) while the total meat category decreased (-0.8%), driven by weaker turkey sales (-4.7%). Chicken pound sales increased (+1.2%) versus a year ago while pork pounds decreased (-1.7%).
3. **Average Price:** November's average price per pound for beef decreased (-6.9%) versus a year ago to \$4.62/lb., down from October's average price of \$4.69/lb. Chicken price was unchanged (+0.0%) and pork price decreased (-3.9%). Beef's average price per pound for the latest 52 weeks decreased (-8.4%) compared to October's 52-week decrease (-7.7%).
4. **Feature Activity and Share:** November beef retail feature activity decreased (-2.0%). Ad activity increased for chicken (+19.2%) and decreased for pork (-0.9%). Beef ad share increased (+3.5%) for the latest 52-week period and it remains the most featured protein (40.8%) of all meat ads compared to chicken (24.8%) and pork (24.0%).
5. **Feature Price:** Average total meat feature price decreased (-7.5%) in November. The average feature price decreased for beef (-7.2%), was unchanged for pork (+0.0%) and decreased for chicken (-2.3%). Beef volume sold on feature represented 31.6% of total November beef pound sales, on par with 31.6% for the latest 52 weeks.



# Total US – Fresh Meat Sales

November 2016

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16-11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>\$3,986,450,612</b>	<b>- 3.2%</b>	<b>\$12,150,473,244</b>	<b>- 3.1%</b>	<b>\$48,228,659,400</b>	<b>- 2.6%</b>
Beef	\$1,752,285,593	- 4.6%	\$5,927,522,131	- 4.5%	\$24,028,762,039	- 3.1%
Chicken	\$893,464,058	+ 1.2%	\$3,015,380,173	+ 1.9%	\$11,879,683,221	+ 1.3%
Pork	\$673,481,629	- 5.5%	\$2,014,882,456	- 6.6%	\$8,440,236,889	- 7.7%
Turkey	\$584,263,849	- 3.5%	\$937,756,687	- 2.3%	\$2,818,066,804	- 0.8%
Lamb	\$28,506,395	- 1.3%	\$89,990,025	- 0.3%	\$406,373,313	+ 2.0%
Veal	\$5,564,120	- 8.0%	\$17,053,411	- 10.0%	\$68,853,436	- 9.5%
Other*	\$48,884,968	+ 4.2%	\$147,888,361	+ 5.5%	\$586,683,698	+ 5.9%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16-11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>1,489,530,220</b>	<b>- 0.8%</b>	<b>3,920,625,666</b>	<b>+ 1.1%</b>	<b>14,780,339,678</b>	<b>+ 2.4%</b>
Beef	379,442,445	+ 2.5%	1,259,301,819	+ 4.2%	4,932,061,999	+ 5.8%
Chicken	381,975,541	+ 1.2%	1,296,823,861	+ 2.0%	5,101,943,398	+ 2.4%
Pork	262,145,802	- 1.7%	750,974,646	- 2.6%	3,211,403,935	- 0.6%
Turkey	447,722,941	- 4.7%	558,698,706	- 3.0%	1,309,769,745	- 2.6%
Lamb	4,007,432	+ 0.4%	12,460,850	+ 1.3%	57,610,935	+ 4.6%
Veal	845,475	- 4.2%	2,482,334	- 8.3%	9,860,971	- 9.2%
Other*	13,390,585	+ 10.6%	39,883,450	+ 10.9%	157,688,695	+ 8.2%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16-11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>\$2.68</b>	<b>- 2.5%</b>	<b>\$3.10</b>	<b>- 4.1%</b>	<b>\$3.26</b>	<b>- 4.9%</b>
Beef	\$4.62	- 6.9%	\$4.71	- 8.4%	\$4.87	- 8.4%
Chicken	\$2.34	0.0%	\$2.33	- 0.1%	\$2.33	- 1.1%
Pork	\$2.57	- 3.9%	\$2.68	- 4.1%	\$2.63	- 7.1%
Turkey	\$1.30	+ 1.3%	\$1.68	+ 0.8%	\$2.15	+ 1.8%
Lamb	\$7.11	- 1.7%	\$7.22	- 1.6%	\$7.05	- 2.5%
Veal	\$6.58	- 4.0%	\$6.87	- 1.8%	\$6.98	- 0.3%
Other*	\$3.65	- 5.9%	\$3.71	- 4.8%	\$3.72	- 2.2%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 11/20/16



# Total US - Fresh Meat Feature and Promotion

November 2016

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16 - 11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>1,081,642</b>	<b>4.7%</b>	<b>3,345,111</b>	<b>5.4%</b>	<b>12,360,964</b>	<b>0.1%</b>
Beef	376,705	-2.0%	1,329,485	3.1%	5,038,985	3.5%
Chicken	234,916	19.2%	806,585	6.7%	3,067,765	-3.8%
Lamb	19,120	-25.0%	52,150	-14.2%	266,220	0.7%
Pork	215,085	-0.9%	773,215	3.2%	2,970,885	-0.1%
Turkey	230,796	12.4%	366,081	20.9%	961,534	-3.9%
Veal	5,020	18.4%	17,595	15.1%	55,575	1.0%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16 - 11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	34.8%	-2.4%	39.7%	-0.9%	40.8%	1.4%
Chicken	21.7%	2.7%	24.1%	0.3%	24.8%	-1.0%
Lamb	1.8%	-0.7%	1.6%	-0.4%	2.2%	0.0%
Pork	19.9%	-1.1%	23.1%	-0.5%	24.0%	0.0%
Turkey	21.3%	1.5%	10.9%	1.4%	7.8%	-0.3%
Veal	0.5%	0.1%	0.5%	0.0%	0.4%	0.0%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16 - 11/20/16	% Change	WE 11/20/16	% Change	WE 11/20/16	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.40</b>	<b>-7.5%</b>	<b>\$ 3.72</b>	<b>-6.6%</b>	<b>\$ 3.92</b>	<b>-5.3%</b>
Beef	\$ 5.27	-7.2%	\$ 5.29	-8.3%	\$ 5.53	-7.5%
Chicken	\$ 2.54	-2.3%	\$ 2.56	-1.3%	\$ 2.60	-0.6%
Lamb	\$ 6.72	-5.6%	\$ 6.86	-1.4%	\$ 6.79	-5.3%
Pork	\$ 2.55	0.0%	\$ 2.59	-3.6%	\$ 2.60	-9.0%
Turkey	\$ 1.68	3.5%	\$ 2.36	5.5%	\$ 2.69	-2.5%
Veal	\$ 6.75	-24.5%	\$ 7.01	-17.1%	\$ 7.63	-10.7%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/24/16 - 11/20/16		WE 11/20/16		WE 11/20/16	
<b>TOTAL MEAT</b>	<b>32.7%</b>	<b>\$ 1.98</b>	<b>30.3%</b>	<b>\$ 2.53</b>	<b>29.4%</b>	<b>\$ 2.86</b>
Beef	31.6%	\$ 4.26	31.9%	\$ 4.32	31.6%	\$ 4.54
Chicken	22.1%	\$ 1.91	22.9%	\$ 1.87	23.6%	\$ 1.87
Lamb	31.9%	\$ 2.21	32.8%	\$ 2.24	32.2%	\$ 2.29
Pork	53.9%	\$ 0.99	41.7%	\$ 1.12	30.5%	\$ 1.41
Turkey	17.1%	\$ 6.01	16.7%	\$ 6.14	21.3%	\$ 5.83
Veal	16.5%	\$ 5.62	17.6%	\$ 6.67	16.1%	\$ 6.59

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

