

Retail Beef Performance
IRI/Freshlook Marketing and USDA Market News
November 2017 Highlights

1. **Dollar Sales:** November beef dollar sales increased (+4.2%) versus the prior year. Chicken dollar sales increased (+4.8%) while pork dollar sales decreased (-1.5%). November total meat category dollar sales increased (+1.2%).
2. **Pound Sales:** November beef pound sales versus a year ago increased (+1.6%) and the total meat category increased (+0.2%). Chicken pound sales increased (+1.8%) versus a year ago and pork pounds decreased (-2.7%).
3. **Average Price:** November's average price per pound for beef increased (+2.6%) versus a year ago to \$4.75/lb., up slightly from October's average price of \$4.74/lb. Chicken price increased (+2.9%) whereas pork price increased (+1.2%). Beef's average price per pound for the latest 52 weeks decreased (-1.0%), less than October's 52-week decrease (-1.7%).
4. **Feature Activity and Share:** November beef retail feature activity decreased (-0.6%). Ad activity increased for chicken (+5.1%) but decreased for pork (-10.9%). Beef ad share decreased (-0.2%) for November but it remains the most featured protein (34.5%) across all meat ads compared to chicken (18.0%), pork (16.6%) and turkey (29.0%).
5. **Feature Price:** Average total meat feature price decreased (-0.9%) in November. The average feature price increased for beef (+2.3%) and chicken (+2.9%) yet decreased for pork (-3.1%). Beef volume sold on feature represented 26.6% of total November beef pound sales, seasonally below the 30.2% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

November 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17-11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	\$4,250,725,540	+ 1.2%	\$12,632,356,446	+ 2.0%	\$49,066,685,492	+ 1.4%
Beef	\$1,756,770,816	+ 4.2%	\$6,062,484,598	+ 3.2%	\$24,520,734,269	+ 1.7%
Chicken	\$876,001,669	+ 4.8%	\$3,078,517,063	+ 4.1%	\$12,404,637,978	+ 4.2%
Pork	\$752,046,361	- 1.5%	\$2,085,887,314	- 0.8%	\$8,273,169,518	- 2.4%
Turkey	\$781,118,622	- 5.7%	\$1,150,971,531	- 3.5%	\$2,812,472,319	- 0.9%
Lamb	\$29,448,085	+ 0.5%	\$90,535,418	- 0.4%	\$402,370,692	- 1.1%
Veal	\$4,891,737	- 8.5%	\$15,182,885	- 12.3%	\$64,381,105	- 7.2%
Other*	\$50,448,250	+ 0.2%	\$148,777,637	- 0.6%	\$588,919,611	+ 0.3%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17-11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	1,701,561,798	+ 0.2%	4,156,358,070	0.0%	15,107,481,543	+ 1.3%
Beef	369,550,558	+ 1.6%	1,261,983,645	+ 0.4%	5,111,008,274	+ 2.8%
Chicken	363,393,722	+ 1.8%	1,282,768,617	+ 0.6%	5,210,341,652	+ 1.4%
Pork	298,858,466	- 2.7%	784,613,465	- 2.0%	3,205,514,962	- 1.1%
Turkey	652,063,694	+ 0.2%	773,952,005	+ 0.7%	1,358,935,204	+ 2.5%
Lamb	3,907,958	- 6.6%	11,876,690	- 7.3%	55,935,143	- 3.9%
Veal	730,418	- 11.0%	2,214,760	- 12.2%	9,234,189	- 7.1%
Other*	13,056,981	- 5.6%	38,948,887	- 3.7%	156,512,119	- 1.3%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17-11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	\$2.50	+ 1.0%	\$3.04	+ 2.0%	\$3.25	+ 0.1%
Beef	\$4.75	+ 2.6%	\$4.80	+ 2.8%	\$4.80	- 1.0%
Chicken	\$2.41	+ 2.9%	\$2.40	+ 3.5%	\$2.38	+ 2.8%
Pork	\$2.52	+ 1.2%	\$2.66	+ 1.2%	\$2.58	- 1.3%
Turkey	\$1.20	- 5.9%	\$1.49	- 4.2%	\$2.07	- 3.3%
Lamb	\$7.54	+ 7.6%	\$7.62	+ 7.5%	\$7.19	+ 3.0%
Veal	\$6.70	+ 2.9%	\$6.86	- 0.1%	\$6.97	- 0.2%
Other*	\$3.86	+ 6.1%	\$3.82	+ 3.2%	\$3.76	+ 1.7%

*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 11/26/17



Total US - Fresh Meat Feature and Promotion

November 2017

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17 - 11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	1,039,548	-0.2%	3,231,793	-2.7%	12,819,705	3.9%
Beef	358,340	-0.6%	1,235,850	-5.4%	5,152,495	2.6%
Chicken	186,689	5.1%	839,221	9.7%	3,421,734	12.1%
Lamb	16,820	-30.6%	36,015	-36.3%	202,710	-23.7%
Pork	172,050	-10.9%	676,090	-10.5%	2,931,445	-1.1%
Turkey	301,689	7.3%	431,002	2.2%	1,044,186	6.5%
Veal	3,960	-20.2%	13,615	-20.4%	67,135	21.8%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17 - 11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	34.5%	-0.2%	38.2%	-1.1%	40.2%	-0.5%
Chicken	18.0%	0.9%	26.0%	2.9%	26.7%	2.0%
Lamb	1.6%	-0.7%	1.1%	-0.6%	1.6%	-0.6%
Pork	16.6%	-2.0%	20.9%	-1.8%	22.9%	-1.1%
Turkey	29.0%	2.0%	13.3%	0.6%	8.1%	0.2%
Veal	0.4%	-0.1%	0.4%	-0.1%	0.5%	0.1%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17 - 11/26/17	% Change	WE 11/26/17	% Change	WE 11/26/17	% Change
TOTAL MEAT	\$ 3.41	-0.9%	\$ 3.68	-0.7%	\$ 3.83	-2.2%
Beef	\$ 5.64	2.3%	\$ 5.41	1.5%	\$ 5.41	-2.0%
Chicken	\$ 2.66	2.9%	\$ 2.71	5.2%	\$ 2.67	2.5%
Lamb	\$ 7.43	7.4%	\$ 7.30	6.4%	\$ 7.06	3.7%
Pork	\$ 2.48	-3.1%	\$ 2.52	-2.6%	\$ 2.51	-3.4%
Turkey	\$ 1.47	-6.4%	\$ 2.01	-8.2%	\$ 2.59	-2.8%
Veal	\$ 7.69	19.0%	\$ 7.66	10.9%	\$ 7.40	-3.3%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/30/17 - 11/26/17		WE 11/26/17		WE 11/26/17	
TOTAL MEAT	30.4%	\$ 1.71	28.7%	\$ 2.38	28.2%	\$ 2.81
Beef	26.6%	\$ 4.39	29.4%	\$ 4.40	30.2%	\$ 4.40
Chicken	21.2%	\$ 2.07	21.9%	\$ 1.93	22.5%	\$ 1.93
Lamb	24.6%	\$ 2.24	30.1%	\$ 2.24	30.6%	\$ 2.23
Pork	53.0%	\$ 0.93	43.2%	\$ 1.03	31.6%	\$ 1.34
Turkey	17.0%	\$ 6.61	15.8%	\$ 6.30	18.7%	\$ 5.84
Veal	13.4%	\$ 5.00	15.1%	\$ 5.67	14.7%	\$ 6.06

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

