

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

1. **Dollar Sales:** December beef dollar sales decreased (-0.3%) versus the prior year. Chicken dollar sales increased (+7.3%) while pork dollar sales decreased (-2.5%). While December Beef dollar sales declined, total meat category dollar sales increased (+1.0%).
2. **Pound Sales:** December beef pound sales versus a year ago increased (+6.0%) while the total meat category increased (+4.7%). Chicken pound sales increased (+7.0%) versus a year ago while pork pounds increased (+1.4%).
3. **Average Price:** December's average price per pound for beef decreased (-6.0%) versus a year ago to \$4.80/lb., up from November's average price of \$4.62/lb., boosted by holiday roast sales. Chicken price increased (+0.3%) and pork price decreased (-3.9%). Beef's average price per pound for the latest 52 weeks decreased (-8.3%) compared to November's 52-week decrease (-8.4%).
4. **Feature Activity and Share:** December beef retail feature activity increased (+2.9%). Ad activity increased for chicken (+4.7%) as well as for pork (+1.3%). Beef ad share increased (+0.9%) for the latest 52-week period and it remains the most featured protein (40.8%) of all meat ads compared to chicken (24.9%) and pork (24.0%).
5. **Feature Price:** Average total meat feature price decreased (-4.6%) in December. The average feature price decreased for beef (-5.4%), as well as for pork (-3.1%) and chicken (-5.1%). Beef volume sold on feature represented 32.7% of total December beef pound sales, an increase from 31.4% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

December 2016

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16-12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	\$5,082,297,143	+ 1.0%	\$12,682,272,559	- 1.6%	\$48,279,512,023	- 2.4%
Beef	\$2,316,561,749	- 0.3%	\$5,922,404,147	- 2.8%	\$24,021,139,209	- 3.4%
Chicken	\$1,031,182,073	+ 7.3%	\$2,858,170,031	+ 3.3%	\$11,950,069,982	+ 1.8%
Pork	\$1,059,527,714	- 2.5%	\$2,317,215,136	- 4.8%	\$8,412,585,933	- 6.7%
Turkey	\$557,647,606	+ 2.8%	\$1,307,089,491	- 0.4%	\$2,833,471,103	+ 0.1%
Lamb	\$44,914,596	- 1.8%	\$100,538,933	- 1.3%	\$405,555,197	+ 1.3%
Veal	\$7,058,904	- 4.9%	\$18,078,079	- 8.2%	\$68,490,362	- 9.0%
Other*	\$65,404,499	+ 2.4%	\$158,776,742	+ 3.5%	\$588,200,238	+ 7.5%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16-12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	1,768,539,167	+ 4.7%	4,339,093,803	+ 1.9%	14,859,073,044	+ 2.7%
Beef	482,705,535	+ 6.0%	1,257,277,375	+ 4.6%	4,959,571,330	+ 5.4%
Chicken	437,853,590	+ 7.0%	1,222,290,686	+ 3.1%	5,130,713,382	+ 3.0%
Pork	464,668,700	+ 1.4%	940,413,784	- 0.8%	3,217,828,979	- 0.8%
Turkey	358,451,808	+ 4.6%	859,599,209	- 0.5%	1,325,612,842	- 0.3%
Lamb	6,533,347	- 0.8%	14,320,951	+ 0.3%	57,555,070	+ 3.8%
Veal	1,081,746	- 2.6%	2,721,418	- 5.8%	9,831,629	- 8.0%
Other*	17,244,442	+ 1.6%	42,470,381	+ 6.1%	157,959,812	+ 10.2%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16-12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	\$2.87	- 3.5%	\$2.92	- 3.4%	\$3.25	- 5.0%
Beef	\$4.80	- 6.0%	\$4.71	- 7.1%	\$4.84	- 8.3%
Chicken	\$2.36	+ 0.3%	\$2.34	+ 0.2%	\$2.33	- 1.1%
Pork	\$2.28	- 3.9%	\$2.46	- 4.1%	\$2.61	- 6.0%
Turkey	\$1.56	- 1.7%	\$1.52	+ 0.1%	\$2.14	+ 0.5%
Lamb	\$6.87	- 0.9%	\$7.02	- 1.6%	\$7.05	- 2.4%
Veal	\$6.53	- 2.3%	\$6.64	- 2.6%	\$6.97	- 1.1%
Other*	\$3.79	+ 0.8%	\$3.74	- 2.4%	\$3.72	- 2.5%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Five Weeks Ending 12/25/16



Total US - Fresh Meat Feature and Promotion

December 2016

Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16 - 12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	1,244,222	2.0%	3,341,320	4.5%	12,385,771	0.2%
Beef	521,250	2.9%	1,328,045	1.8%	5,053,505	2.5%
Chicken	245,934	4.7%	730,424	9.1%	3,078,881	-1.9%
Lamb	44,780	-12.0%	77,560	-15.5%	260,140	-0.7%
Pork	257,680	1.3%	720,735	2.6%	2,974,125	-0.9%
Turkey	169,718	1.4%	468,141	13.0%	963,840	-0.6%
Veal	4,860	-5.7%	16,415	12.9%	55,280	-2.4%

Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16 - 12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	41.9%	0.3%	39.7%	-1.1%	40.8%	0.9%
Chicken	19.8%	0.5%	21.9%	0.9%	24.9%	-0.5%
Lamb	3.6%	-0.6%	2.3%	-0.5%	2.1%	0.0%
Pork	20.7%	-0.2%	21.6%	-0.4%	24.0%	-0.3%
Turkey	13.6%	-0.1%	14.0%	1.1%	7.8%	-0.1%
Veal	0.4%	0.0%	0.5%	0.0%	0.4%	0.0%

Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16 - 12/25/16	% Change	WE 12/25/16	% Change	WE 12/25/16	% Change
TOTAL MEAT	\$ 3.95	-4.6%	\$ 3.75	-5.8%	\$ 3.90	-5.5%
Beef	\$ 5.72	-5.4%	\$ 5.44	-6.2%	\$ 5.50	-7.6%
Chicken	\$ 2.58	-5.1%	\$ 2.60	-1.4%	\$ 2.59	-0.6%
Lamb	\$ 7.03	1.7%	\$ 6.95	-0.6%	\$ 6.81	-4.2%
Pork	\$ 2.42	-3.1%	\$ 2.51	-3.4%	\$ 2.59	-7.6%
Turkey	\$ 1.93	1.2%	\$ 2.03	4.9%	\$ 2.69	-2.5%
Veal	\$ 7.14	-9.0%	\$ 7.03	-18.4%	\$ 7.56	-11.0%

Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/21/16 - 12/25/16		WE 12/25/16		WE 12/25/16	
TOTAL MEAT	29.5%	\$ 2.62	30.3%	\$ 2.43	29.3%	\$ 2.84
Beef	32.7%	\$ 4.79	31.9%	\$ 4.47	31.4%	\$ 4.52
Chicken	20.3%	\$ 1.96	21.9%	\$ 1.92	23.5%	\$ 1.87
Lamb	27.4%	\$ 2.18	30.6%	\$ 2.22	32.3%	\$ 2.29
Pork	36.1%	\$ 1.15	42.3%	\$ 1.09	30.9%	\$ 1.39
Turkey	23.2%	\$ 5.78	20.0%	\$ 5.87	20.7%	\$ 5.82
Veal	16.5%	\$ 5.65	18.2%	\$ 6.09	16.3%	\$ 6.52

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

