

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

1. **Dollar Sales:** December beef dollar sales increased (+6.4%) versus the prior year. Chicken dollar sales increased (+4.2%) while pork dollar sales decreased (-1.8%). December total meat category dollar sales increased (+3.4%).
2. **Pound Sales:** December beef pound sales versus a year ago increased (+3.5%) and the total meat category increased (+0.7%). Chicken pound sales increased (+1.3%) versus a year ago and pork pounds decreased (-0.9%).
3. **Average Price:** December's average price per pound for beef increased (+2.7%) versus a year ago to \$4.90/lb., up seasonally from November's average price of \$4.75/lb. Chicken price increased (+2.9%) whereas pork price decreased (-0.9%). Beef's average price per pound for the latest 52 weeks decreased (-0.1%), less than November's 52-week decrease (-1.0%).
4. **Feature Activity and Share:** December beef retail feature activity decreased (-7.0%). Ad activity decreased for chicken (-10.4%) and for pork (-18.8%) as featuring activity for all meat and poultry declined sharply (-9.5%). Beef ad share increased (+1.2%) for December and it remains the most featured protein (43.3%) across all meat ads compared to chicken (22.0%) and pork (20.5%).
5. **Feature Price:** Average total meat feature price increased (+1.3%) in December. The average feature price for beef was unchanged (+0.0%). It increased for chicken (+2.1%) and pork (+5.2%). Beef volume sold on feature represented 32.0% of total December beef pound sales, higher than the 30.1% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

December 2017

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17-12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>\$5,118,389,231</b>	<b>+ 3.4%</b>	<b>\$13,065,561,650</b>	<b>+ 2.5%</b>	<b>\$49,235,561,484</b>	<b>+ 1.8%</b>
Beef	\$2,580,093,756	+ 6.4%	\$6,235,483,520	+ 4.8%	\$24,675,606,306	+ 2.5%
Chicken	\$1,110,608,993	+ 4.2%	\$2,956,885,210	+ 4.4%	\$12,449,602,618	+ 4.3%
Pork	\$1,007,429,155	- 1.8%	\$2,339,139,242	- 1.3%	\$8,254,224,101	- 2.2%
Turkey	\$302,581,183	- 3.8%	\$1,255,565,835	- 4.3%	\$2,800,504,752	- 1.4%
Lamb	\$46,005,098	- 1.2%	\$102,916,186	- 0.1%	\$401,814,199	- 1.1%
Veal	\$6,893,847	- 5.0%	\$16,705,635	- 8.4%	\$64,016,397	- 7.1%
Other*	\$64,777,200	+ 1.4%	\$158,866,023	+ 0.5%	\$589,793,110	+ 0.6%

## Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17-12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>1,612,957,846</b>	<b>+ 0.7%</b>	<b>4,413,615,738</b>	<b>+ 0.7%</b>	<b>15,118,249,493</b>	<b>+ 1.0%</b>
Beef	526,396,733	+ 3.5%	1,296,146,377	+ 2.1%	5,129,039,585	+ 2.6%
Chicken	459,938,255	+ 1.3%	1,233,786,162	+ 1.7%	5,216,088,984	+ 1.2%
Pork	448,441,817	- 0.9%	961,762,874	- 1.2%	3,201,227,129	- 1.5%
Turkey	154,553,331	- 4.5%	864,945,139	- 0.4%	1,351,699,620	+ 1.2%
Lamb	6,115,629	- 11.0%	13,650,120	- 8.4%	55,180,936	- 5.3%
Veal	1,069,534	- 3.5%	2,515,583	- 8.4%	9,195,574	- 7.0%
Other*	16,442,547	- 4.1%	40,809,483	- 4.2%	155,817,665	- 1.4%

## Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17-12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.17</b>	<b>+ 2.7%</b>	<b>\$2.96</b>	<b>+ 1.8%</b>	<b>\$3.26</b>	<b>+ 0.8%</b>
Beef	\$4.90	+ 2.7%	\$4.81	+ 2.6%	\$4.81	- 0.1%
Chicken	\$2.41	+ 2.9%	\$2.40	+ 2.6%	\$2.39	+ 3.1%
Pork	\$2.25	- 0.9%	\$2.43	- 0.1%	\$2.58	- 0.7%
Turkey	\$1.96	+ 0.7%	\$1.45	- 3.8%	\$2.07	- 2.6%
Lamb	\$7.52	+ 11.0%	\$7.54	+ 9.1%	\$7.28	+ 4.5%
Veal	\$6.45	- 1.6%	\$6.64	0.0%	\$6.96	- 0.2%
Other*	\$3.94	+ 5.6%	\$3.89	+ 4.9%	\$3.79	+ 2.1%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System  
Five Weeks Ending 12/31/17



# Total US - Fresh Meat Feature and Promotion

December 2017

## Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17 - 12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>1,167,546</b>	<b>-9.5%</b>	<b>3,216,118</b>	<b>-4.3%</b>	<b>12,697,663</b>	<b>1.8%</b>
Beef	506,000	-7.0%	1,257,980	-5.5%	5,114,585	0.6%
Chicken	257,079	-10.4%	757,431	3.1%	3,391,805	9.4%
Lamb	30,785	-23.7%	57,870	-26.5%	193,165	-26.0%
Pork	239,760	-18.8%	634,580	-13.0%	2,875,885	-4.1%
Turkey	128,847	9.5%	495,952	5.8%	1,055,403	8.7%
Veal	5,075	-5.8%	12,305	-27.1%	66,820	19.3%

## Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17 - 12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	43.3%	1.2%	39.1%	-0.5%	40.3%	-0.5%
Chicken	22.0%	-0.2%	23.6%	1.7%	26.7%	1.9%
Lamb	2.6%	-0.5%	1.8%	-0.5%	1.5%	-0.6%
Pork	20.5%	-2.4%	19.7%	-2.0%	22.6%	-1.4%
Turkey	11.0%	1.9%	15.4%	1.5%	8.3%	0.5%
Veal	0.4%	0.0%	0.4%	-0.1%	0.5%	0.1%

## Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17 - 12/31/17	% Change	WE 12/31/17	% Change	WE 12/31/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 4.02</b>	<b>1.3%</b>	<b>\$ 3.73</b>	<b>-0.6%</b>	<b>\$ 3.83</b>	<b>-1.6%</b>
Beef	\$ 5.60	0.0%	\$ 5.49	1.0%	\$ 5.41	-1.4%
Chicken	\$ 2.69	2.1%	\$ 2.69	2.5%	\$ 2.68	3.0%
Lamb	\$ 7.61	5.9%	\$ 7.49	6.2%	\$ 7.12	4.2%
Pork	\$ 2.54	5.2%	\$ 2.52	0.6%	\$ 2.53	-2.5%
Turkey	\$ 2.23	-2.6%	\$ 1.88	-6.9%	\$ 2.58	-4.1%
Veal	\$ 7.02	0.4%	\$ 7.23	3.9%	\$ 7.40	-2.1%

## Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/27/17 - 12/31/17		WE 12/31/17		WE 12/31/17	
<b>TOTAL MEAT</b>	<b>28.5%</b>	<b>\$ 3.10</b>	<b>29.1%</b>	<b>\$ 2.39</b>	<b>28.1%</b>	<b>\$ 2.82</b>
Beef	32.0%	\$ 4.77	30.0%	\$ 4.51	30.1%	\$ 4.41
Chicken	21.2%	\$ 2.02	22.0%	\$ 1.95	22.4%	\$ 1.93
Lamb	29.4%	\$ 2.09	29.5%	\$ 2.16	30.5%	\$ 2.23
Pork	25.0%	\$ 1.44	42.2%	\$ 1.02	31.6%	\$ 1.35
Turkey	21.9%	\$ 6.44	19.1%	\$ 6.41	18.6%	\$ 5.92
Veal	14.2%	\$ 5.59	15.2%	\$ 5.78	14.6%	\$ 5.99

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

