

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

1. **Dollar Sales:** January beef dollar sales decreased (-2.7%) versus the prior year. Chicken dollar sales were flat (+0.0%) while pork dollar sales decreased (-5.0%). January total meat category dollar sales decreased (-2.3%).
2. **Pound Sales:** January beef pound sales versus a year ago increased (+0.6%) while the total meat category decreased (-0.3%). Chicken pound sales decreased (-1.7%) versus a year ago while pork pounds decreased (-1.4%).
3. **Average Price:** January's average price per pound for beef decreased (-3.3%) versus a year ago to \$4.61/lb., down from December's average price of \$4.80/lb., which was boosted by holiday roast sales. Chicken price increased (+1.7%) and pork price decreased (-3.6%). Beef's average price per pound for the latest 52 weeks decreased (-7.8%) compared to December's 52-week decrease (-8.3%).
4. **Feature Activity and Share:** January beef retail feature activity increased (+9.8%). Ad activity increased for chicken (+15.6%) as well as for pork (+14.8%). Beef ad share increased (+0.6%) for the latest 52-week period and it remains the most featured protein (40.7%) of all meat ads compared to chicken (24.9%) and pork (24.0%).
5. **Feature Price:** Average total meat feature price decreased (-5.4%) in January. The average feature price decreased for beef (-5.0%), as well as for pork (-0.6%) and chicken (-6.9%). Beef volume sold on feature represented 31.1% of total January beef pound sales, a decrease from 31.3% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

January 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16-01/22/17	% Change	WE 01/22/17	% Change	WE 01/22/17	% Change
TOTAL MEAT	\$3,715,638,931	- 2.3%	\$12,784,386,685	- 1.3%	\$48,191,609,120	- 2.7%
Beef	\$1,846,815,510	- 2.7%	\$5,915,662,852	- 2.4%	\$23,970,780,091	- 3.8%
Chicken	\$984,001,456	0.0%	\$2,908,647,587	+ 2.9%	\$11,950,367,983	+ 1.6%
Pork	\$624,750,739	- 5.0%	\$2,357,760,083	- 4.1%	\$8,379,793,154	- 6.8%
Turkey	\$178,374,472	- 2.0%	\$1,320,285,927	- 0.7%	\$2,829,763,593	- 0.1%
Lamb	\$31,684,005	- 0.4%	\$105,104,997	- 1.2%	\$405,435,817	+ 1.1%
Veal	\$5,526,815	- 11.5%	\$18,149,839	- 7.9%	\$67,774,765	- 9.2%
Other*	\$44,485,933	- 1.1%	\$158,775,401	+ 1.9%	\$587,693,717	+ 7.8%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16-01/22/17	% Change	WE 01/22/17	% Change	WE 01/22/17	% Change
TOTAL MEAT	1,139,705,878	- 0.3%	4,397,775,266	+ 1.5%	14,855,268,714	+ 2.0%
Beef	400,686,171	+ 0.6%	1,262,834,151	+ 3.2%	4,962,113,817	+ 4.4%
Chicken	413,067,709	- 1.7%	1,232,896,839	+ 2.2%	5,123,710,527	+ 2.4%
Pork	246,881,029	- 1.4%	973,695,531	- 0.2%	3,214,329,077	- 1.6%
Turkey	61,899,421	+ 8.6%	868,074,170	- 0.2%	1,330,516,928	+ 0.1%
Lamb	4,631,327	+ 0.2%	15,172,105	- 0.2%	57,562,044	+ 3.4%
Veal	808,233	- 12.3%	2,735,453	- 6.2%	9,718,384	- 8.1%
Other*	11,731,990	- 5.2%	42,367,016	+ 2.2%	157,317,937	+ 10.2%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16-01/22/17	% Change	WE 01/22/17	% Change	WE 01/22/17	% Change
TOTAL MEAT	\$3.26	- 2.0%	\$2.91	- 2.7%	\$3.24	- 4.6%
Beef	\$4.61	- 3.3%	\$4.68	- 5.4%	\$4.83	- 7.8%
Chicken	\$2.38	+ 1.7%	\$2.36	+ 0.7%	\$2.33	- 0.8%
Pork	\$2.53	- 3.6%	\$2.42	- 3.9%	\$2.61	- 5.2%
Turkey	\$2.88	- 9.8%	\$1.52	- 0.5%	\$2.13	- 0.3%
Lamb	\$6.84	- 0.5%	\$6.93	- 1.0%	\$7.04	- 2.3%
Veal	\$6.84	+ 0.9%	\$6.64	- 1.9%	\$6.97	- 1.2%
Other*	\$3.79	+ 4.3%	\$3.75	- 0.3%	\$3.74	- 2.2%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 01/22/17



Total US - Fresh Meat Feature and Promotion

January 2017

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16 - 1/22/17	% Change	WE 1/22/17	% Change	WE 1/22/17	% Change
TOTAL MEAT	1,005,702	14.1%	3,331,566	6.3%	12,510,141	2.0%
Beef	403,310	9.8%	1,301,265	3.4%	5,089,595	3.5%
Chicken	270,286	15.6%	751,136	12.9%	3,115,395	0.6%
Lamb	13,150	-19.0%	77,050	-16.8%	257,050	-2.8%
Pork	252,590	14.8%	725,355	4.9%	3,006,770	0.6%
Turkey	59,506	46.8%	460,020	11.3%	982,821	4.1%
Veal	6,860	89.0%	16,740	28.5%	58,510	5.2%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16 - 1/22/17	% Change	WE 1/22/17	% Change	WE 1/22/17	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	40.1%	-1.6%	39.1%	-1.1%	40.7%	0.6%
Chicken	26.9%	0.4%	22.5%	1.3%	24.9%	-0.3%
Lamb	1.3%	-0.5%	2.3%	-0.6%	2.1%	-0.1%
Pork	25.1%	0.2%	21.8%	-0.3%	24.0%	-0.3%
Turkey	5.9%	1.3%	13.8%	0.6%	7.9%	0.2%
Veal	0.7%	0.3%	0.5%	0.1%	0.5%	0.0%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16 - 1/22/17	% Change	WE 1/22/17	% Change	WE 1/22/17	% Change
TOTAL MEAT	\$ 3.72	-5.4%	\$ 3.70	-5.7%	\$ 3.88	-5.6%
Beef	\$ 5.05	-5.0%	\$ 5.38	-5.9%	\$ 5.47	-7.5%
Chicken	\$ 2.68	-6.9%	\$ 2.61	-5.0%	\$ 2.58	-1.3%
Lamb	\$ 7.50	10.0%	\$ 7.03	1.2%	\$ 6.84	-3.6%
Pork	\$ 2.51	-0.6%	\$ 2.49	-1.3%	\$ 2.59	-6.2%
Turkey	\$ 3.19	-8.3%	\$ 1.97	2.5%	\$ 2.69	-1.6%
Veal	\$ 7.65	-0.7%	\$ 7.23	-11.4%	\$ 7.56	-11.1%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/26/16 - 1/22/17		WE 1/22/17		WE 1/22/17	
TOTAL MEAT	29.5%	\$ 2.87	30.5%	\$ 2.41	29.2%	\$ 2.83
Beef	31.1%	\$ 4.20	31.9%	\$ 4.43	31.3%	\$ 4.50
Chicken	24.6%	\$ 1.93	22.3%	\$ 1.93	23.4%	\$ 1.88
Lamb	34.6%	\$ 2.22	31.2%	\$ 2.21	32.1%	\$ 2.28
Pork	28.0%	\$ 2.17	43.0%	\$ 1.10	31.5%	\$ 1.40
Turkey	21.6%	\$ 5.84	21.1%	\$ 5.85	20.7%	\$ 5.85
Veal	14.4%	\$ 6.59	15.8%	\$ 5.87	16.4%	\$ 6.53

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

