

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

1. **Dollar Sales:** February beef dollar sales increased (+6.0%) versus the prior year. Chicken dollar sales increased (+5.9%) while pork dollar sales decreased (-1.7%). February total meat category dollar sales increased (+4.6%).
2. **Pound Sales:** February beef pound sales versus a year ago increased (+4.4%) and the total meat category increased (+1.9%). Chicken pound sales increased (+2.6%) versus a year ago and pork pounds decreased (-4.5%).
3. **Average Price:** February's average price per pound for beef increased (+1.6%) versus a year ago to \$4.74/lb., up from January's average price of \$4.63/lb. Chicken price increased (+3.2%) whereas pork price increased (+3.0%). Beef's average price per pound for the latest 52 weeks increased (+0.7%), up from January's 52-week increase (+0.3%).
4. **Feature Activity and Share:** February beef retail feature activity decreased (-7.4%). Ad activity decreased for chicken (-2.5%) but increased for pork (+5.8%) as featuring activity for all meat and poultry declined (-3.6%). Beef ad share decreased (-1.6%) for February, yet it remains the most featured protein (40.1%) across all meat ads compared to chicken (27.3%) and pork (25.7%).
5. **Feature Price:** Average total meat feature price increased (+1.1%) in February. The average feature price for beef increased (+0.8%). It increased for chicken (+13.6%) and was unchanged for pork (0.0%). Beef volume sold on feature represented 30.2% of total February beef pound sales, above the 29.9% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

February 2018

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/29/18-02/25/18	% Change	WE 02/25/18	% Change	WE 02/25/18	% Change
<b>TOTAL MEAT</b>	<b>\$3,815,609,077</b>	<b>+ 4.6%</b>	<b>\$12,836,850,534</b>	<b>+ 4.5%</b>	<b>\$49,614,521,629</b>	<b>+ 2.5%</b>
Beef	\$1,961,444,620	+ 6.0%	\$6,516,156,112	+ 6.7%	\$24,928,043,780	+ 3.4%
Chicken	\$1,032,803,771	+ 5.9%	\$3,215,285,950	+ 5.1%	\$12,561,158,712	+ 4.4%
Pork	\$569,711,865	- 1.7%	\$2,169,675,441	- 0.8%	\$8,254,610,228	- 1.6%
Turkey	\$169,606,470	+ 3.9%	\$654,580,501	- 0.4%	\$2,809,772,492	- 1.1%
Lamb	\$28,344,173	- 1.9%	\$105,707,160	+ 0.8%	\$403,200,954	- 0.8%
Veal	\$5,392,153	- 6.4%	\$17,902,587	- 4.0%	\$63,626,057	- 6.6%
Other*	\$48,306,026	+ 6.4%	\$157,542,782	+ 3.4%	\$594,109,406	+ 1.2%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/29/18-02/25/18	% Change	WE 02/25/18	% Change	WE 02/25/18	% Change
<b>TOTAL MEAT</b>	<b>1,117,934,020</b>	<b>+ 1.9%</b>	<b>3,896,414,119</b>	<b>+ 1.5%</b>	<b>15,165,721,493</b>	<b>+ 1.0%</b>
Beef	413,414,449	+ 4.4%	1,366,196,358	+ 4.4%	5,168,304,830	+ 2.7%
Chicken	423,508,104	+ 2.6%	1,323,639,462	+ 1.9%	5,235,596,957	+ 1.1%
Pork	210,648,497	- 4.5%	882,395,100	- 2.1%	3,186,635,282	- 1.6%
Turkey	53,791,814	+ 6.9%	267,386,309	- 1.3%	1,355,503,784	+ 1.0%
Lamb	3,645,113	- 10.9%	14,148,993	- 7.6%	54,767,156	- 6.2%
Veal	821,585	+ 1.0%	2,730,855	- 0.1%	9,232,726	- 5.1%
Other*	12,104,458	- 1.1%	39,917,041	- 2.0%	155,680,759	- 1.3%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/29/18-02/25/18	% Change	WE 02/25/18	% Change	WE 02/25/18	% Change
<b>TOTAL MEAT</b>	<b>\$3.41</b>	<b>+ 2.6%</b>	<b>\$3.29</b>	<b>+ 2.9%</b>	<b>\$3.27</b>	<b>+ 1.5%</b>
Beef	\$4.74	+ 1.6%	\$4.77	+ 2.2%	\$4.82	+ 0.7%
Chicken	\$2.44	+ 3.2%	\$2.43	+ 3.1%	\$2.40	+ 3.3%
Pork	\$2.70	+ 3.0%	\$2.46	+ 1.3%	\$2.59	0.0%
Turkey	\$3.15	- 2.8%	\$2.45	+ 0.9%	\$2.07	- 2.1%
Lamb	\$7.78	+ 10.0%	\$7.47	+ 9.1%	\$7.36	+ 5.8%
Veal	\$6.56	- 7.3%	\$6.56	- 4.0%	\$6.89	- 1.5%
Other*	\$3.99	+ 7.6%	\$3.95	+ 5.6%	\$3.82	+ 2.5%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 02/25/18



# Total US - Fresh Meat Feature and Promotion

February 2018

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/29/18 - 2/25/18	% Change	WE 2/25/18	% Change	WE 2/25/18	% Change
<b>TOTAL MEAT</b>	<b>937,515</b>	<b>-3.6%</b>	<b>3,009,440</b>	<b>-7.3%</b>	<b>12,581,910</b>	<b>-0.3%</b>
Beef	375,480	-7.4%	1,259,320	-6.7%	5,062,465	-1.3%
Chicken	255,909	-2.5%	768,628	-7.0%	3,364,181	6.2%
Lamb	10,680	-31.1%	51,085	-24.5%	186,095	-25.8%
Pork	240,680	5.8%	678,270	-10.3%	2,853,155	-5.2%
Turkey	49,321	-11.7%	235,917	3.0%	1,051,089	5.3%
Veal	5,445	-6.8%	16,220	-12.0%	64,925	8.3%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/29/18 - 2/25/18	% Change	WE 2/25/18	% Change	WE 2/25/18	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	40.1%	-1.6%	41.8%	0.3%	40.2%	-0.4%
Chicken	27.3%	0.3%	25.5%	0.1%	26.7%	1.6%
Lamb	1.1%	-0.5%	1.7%	-0.4%	1.5%	-0.5%
Pork	25.7%	2.3%	22.5%	-0.8%	22.7%	-1.2%
Turkey	5.3%	-0.5%	7.8%	0.8%	8.4%	0.4%
Veal	0.6%	0.0%	0.5%	0.0%	0.5%	0.0%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/29/18 - 2/25/18	% Change	WE 2/25/18	% Change	WE 2/25/18	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.84</b>	<b>1.1%</b>	<b>\$ 3.90</b>	<b>2.1%</b>	<b>\$ 3.84</b>	<b>-0.4%</b>
Beef	\$ 5.33	0.8%	\$ 5.38	1.2%	\$ 5.43	-0.1%
Chicken	\$ 2.79	13.6%	\$ 2.75	7.2%	\$ 2.72	5.7%
Lamb	\$ 7.09	-1.0%	\$ 7.41	3.6%	\$ 7.12	3.8%
Pork	\$ 2.50	0.0%	\$ 2.50	1.8%	\$ 2.53	-2.5%
Turkey	\$ 3.35	5.4%	\$ 2.77	1.2%	\$ 2.60	-3.3%
Veal	\$ 7.40	-2.4%	\$ 7.15	-4.2%	\$ 7.32	-2.7%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	1/29/18 - 2/25/18		WE 2/25/18		WE 2/25/18	
<b>TOTAL MEAT</b>	<b>28.0%</b>	<b>\$ 2.98</b>	<b>27.9%</b>	<b>\$ 2.98</b>	<b>27.9%</b>	<b>\$ 2.82</b>
Beef	30.2%	\$ 4.37	30.4%	\$ 4.45	29.9%	\$ 4.41
Chicken	23.7%	\$ 1.92	22.7%	\$ 1.93	22.4%	\$ 1.94
Lamb	32.0%	\$ 2.28	30.6%	\$ 2.20	30.4%	\$ 2.24
Pork	20.1%	\$ 2.51	22.9%	\$ 1.82	31.0%	\$ 1.33
Turkey	15.4%	\$ 6.55	20.1%	\$ 6.15	18.4%	\$ 5.94
Veal	15.9%	\$ 4.70	15.4%	\$ 5.40	14.6%	\$ 5.73

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

