

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

1. **Dollar Sales:** May beef dollar sales increased (+0.7%) versus the prior year. Chicken dollar sales increased (+3.7%) while pork dollar sales decreased (-2.1%). May total meat category dollar sales increased (+0.8%).
2. **Pound Sales:** May beef pound sales versus a year ago increased (+3.0%) while the total meat category increased (+1.7%). Chicken pound sales increased (+2.1%) versus a year ago while pork pounds decreased (-0.5%).
3. **Average Price:** May's average price per pound for beef decreased (-2.2%) versus a year ago to \$4.87/lb., up from April's average price of \$4.80/lb. Chicken price increased (+1.6%) and pork price decreased (-1.5%). Beef's average price per pound for the latest 52 weeks decreased (-6.6%), less than April's 52-week decrease (-7.0%).
4. **Feature Activity and Share:** May beef retail feature activity increased (+17.2%). Ad activity increased for chicken (+18.9%) as well as for pork (+5.3%). Beef ad share increased (+0.1%) for the latest 52-week period and it remains the most featured protein (40.8%) across all meat ads compared to chicken (25.3%) and pork (23.5%).
5. **Feature Price:** Average total meat feature price decreased (-1.5%) in May. The average feature price decreased for beef (-1.7%), but increased for chicken (+3.7%) and decreased for pork (-6.3%). Beef volume sold on feature represented 30.7% of total May beef pound sales, a decrease from 31.4% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

May 2017

## Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/24/17-05/21/17	% Change	WE 05/21/17	% Change	WE 05/21/17	% Change
<b>TOTAL MEAT</b>	<b>\$3,640,802,504</b>	<b>+ 0.8%</b>	<b>\$11,922,235,579</b>	<b>+ 1.3%</b>	<b>\$48,379,656,010</b>	<b>- 1.2%</b>
Beef	\$1,858,091,198	+ 0.7%	\$6,020,840,823	+ 1.6%	\$24,075,751,689	- 1.8%
Chicken	\$964,948,267	+ 3.7%	\$3,067,448,004	+ 3.4%	\$12,104,573,225	+ 2.4%
Pork	\$588,994,330	- 2.1%	\$2,024,187,635	- 2.4%	\$8,301,893,353	- 4.9%
Turkey	\$151,811,396	- 1.4%	\$532,777,510	+ 0.7%	\$2,835,144,656	- 0.1%
Lamb	\$29,347,577	- 6.0%	\$118,859,712	- 0.2%	\$405,504,310	- 0.1%
Veal	\$4,849,712	- 7.4%	\$16,765,644	- 5.9%	\$66,413,771	- 8.4%
Other*	\$42,760,024	- 2.5%	\$141,356,250	+ 1.5%	\$590,375,007	+ 4.7%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/24/17-05/21/17	% Change	WE 05/21/17	% Change	WE 05/21/17	% Change
<b>TOTAL MEAT</b>	<b>1,071,893,864</b>	<b>+ 1.7%</b>	<b>3,587,819,726</b>	<b>+ 2.5%</b>	<b>14,975,730,764</b>	<b>+ 2.2%</b>
Beef	381,586,855	+ 3.0%	1,276,863,616	+ 5.8%	5,051,862,520	+ 5.1%
Chicken	406,127,121	+ 2.1%	1,285,352,572	+ 1.5%	5,158,623,314	+ 2.1%
Pork	222,096,838	- 0.5%	796,149,714	- 1.2%	3,199,379,800	- 1.6%
Turkey	45,754,059	- 0.4%	171,401,054	+ 3.5%	1,339,575,532	+ 1.0%
Lamb	4,066,148	- 8.9%	17,358,268	- 0.2%	57,692,431	+ 1.3%
Veal	684,408	- 8.1%	2,392,640	- 3.2%	9,594,661	- 6.1%
Other*	11,578,435	- 1.1%	38,301,862	+ 3.6%	159,002,505	+ 7.2%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/24/17-05/21/17	% Change	WE 05/21/17	% Change	WE 05/21/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.40</b>	<b>- 0.8%</b>	<b>\$3.32</b>	<b>- 1.2%</b>	<b>\$3.23</b>	<b>- 3.3%</b>
Beef	\$4.87	- 2.2%	\$4.72	- 4.0%	\$4.77	- 6.6%
Chicken	\$2.38	+ 1.6%	\$2.39	+ 1.9%	\$2.35	+ 0.3%
Pork	\$2.65	- 1.5%	\$2.54	- 1.2%	\$2.59	- 3.4%
Turkey	\$3.32	- 1.1%	\$3.11	- 2.7%	\$2.12	- 1.1%
Lamb	\$7.22	+ 3.2%	\$6.85	0.0%	\$7.03	- 1.4%
Veal	\$7.09	+ 0.7%	\$7.01	- 2.8%	\$6.92	- 2.4%
Other*	\$3.69	- 1.4%	\$3.69	- 2.0%	\$3.71	- 2.4%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 05/21/17



# Total US - Fresh Meat Feature and Promotion

May 2017

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/24/17 - 5/21/17	% Change	WE 5/21/17	% Change	WE 5/21/17	% Change
<b>TOTAL MEAT</b>	<b>995,832</b>	<b>13.5%</b>	<b>3,225,872</b>	<b>10.4%</b>	<b>12,904,699</b>	<b>7.1%</b>
Beef	415,740	17.2%	1,318,280	11.5%	5,265,365	7.4%
Chicken	267,041	18.9%	851,066	15.4%	3,265,959	8.7%
Lamb	11,125	-34.8%	64,835	-14.4%	240,520	-12.6%
Pork	238,750	5.3%	744,830	2.9%	3,034,960	3.8%
Turkey	57,886	16.7%	228,821	20.3%	1,033,675	17.0%
Veal	5,290	8.2%	18,040	35.2%	64,220	14.1%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/24/17 - 5/21/17	% Change	WE 5/21/17	% Change	WE 5/21/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	41.7%	1.3%	40.9%	0.4%	40.8%	0.1%
Chicken	26.8%	1.2%	26.4%	1.2%	25.3%	0.4%
Lamb	1.1%	-0.8%	2.0%	-0.6%	1.9%	-0.4%
Pork	24.0%	-1.9%	23.1%	-1.7%	23.5%	-0.7%
Turkey	5.8%	0.2%	7.1%	0.6%	8.0%	0.7%
Veal	0.5%	0.0%	0.6%	0.1%	0.5%	0.0%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/24/17 - 5/21/17	% Change	WE 5/21/17	% Change	WE 5/21/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.90</b>	<b>-1.5%</b>	<b>\$ 3.82</b>	<b>-2.5%</b>	<b>\$ 3.84</b>	<b>-4.8%</b>
Beef	\$ 5.45	-1.7%	\$ 5.32	-3.9%	\$ 5.39	-6.6%
Chicken	\$ 2.64	3.7%	\$ 2.59	4.8%	\$ 2.60	1.1%
Lamb	\$ 7.48	10.0%	\$ 6.76	3.0%	\$ 6.92	0.5%
Pork	\$ 2.51	-6.3%	\$ 2.47	-4.9%	\$ 2.56	-4.0%
Turkey	\$ 3.35	-6.5%	\$ 2.96	-3.6%	\$ 2.67	-0.5%
Veal	\$ 7.20	-5.3%	\$ 7.41	-6.8%	\$ 7.35	-12.1%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	4/24/17 - 5/21/17		WE 5/21/17		WE 5/21/17	
<b>TOTAL MEAT</b>	<b>28.6%</b>	<b>\$ 3.02</b>	<b>28.3%</b>	<b>\$ 2.98</b>	<b>29.1%</b>	<b>\$ 2.82</b>
Beef	30.7%	\$ 4.56	31.1%	\$ 4.25	31.4%	\$ 4.42
Chicken	23.9%	\$ 1.90	22.9%	\$ 1.92	23.0%	\$ 1.89
Lamb	33.0%	\$ 2.24	30.8%	\$ 2.21	31.7%	\$ 2.25
Pork	21.0%	\$ 2.99	21.8%	\$ 2.48	31.5%	\$ 1.39
Turkey	16.5%	\$ 5.54	24.1%	\$ 5.49	20.6%	\$ 5.83
Veal	10.0%	\$ 5.79	13.4%	\$ 6.10	15.6%	\$ 6.42

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

