

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

1. **Dollar Sales:** July beef dollar sales decreased (-4.3%) versus the prior year. Chicken dollar sales decreased (-0.1%) while pork dollar sales decreased (-10.0%). The decline in July Beef dollar sales was greater than the decrease in total meat category dollar sales (-4.0%). July sales resumed the general 2016 downtrend of lower Beef dollar sales.
2. **Pound Sales:** July beef pound sales versus a year ago increased (+5.3%) while the total meat category increased (+0.6%). Chicken pound sales were flat (+0.0%) versus a year ago while pork pounds decreased (-6.0%).
3. **Average Price:** July's average price per pound for beef decreased (-9.0%) versus a year ago to \$4.92/lb., down from June's average price of \$4.98/lb. Chicken price decreased (-0.1%) and pork price decreased (-4.3%). Beef's average price per pound for the latest 52 weeks decreased (-5.6%) compared to June's 52-week decrease (-4.2%).
4. **Feature Activity and Share:** July beef retail feature activity increased (+9.8%). Ad activity increased for chicken (+6.8%) and pork (+5.3%). Beef ad share increased (+3.3%) for the latest 52-week period and it remains the most featured protein (40.9%) of all meat ads compared to chicken (24.9%) and pork (24.2%).
5. **Feature Price:** Average total meat feature price decreased (-5.2%) in July. The average feature price decreased for beef (-8.8%) and pork (-5.9%), and increased for chicken (+7.1%). Beef volume sold on feature represented 30.6% of total July beef pound sales.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

July 2016

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/27/16-07/24/16	% Change	WE 07/24/16	% Change	WE 07/24/16	% Change
TOTAL MEAT	\$3,719,306,949	- 4.0%	\$11,973,193,716	- 2.8%	\$48,806,864,530	- 0.6%
Beef	\$1,923,908,296	- 4.3%	\$6,182,155,104	- 3.5%	\$24,437,729,447	+ 0.3%
Chicken	\$942,096,621	- 0.1%	\$3,032,353,225	+ 0.7%	\$11,833,170,571	+ 1.5%
Pork	\$635,318,261	- 10.0%	\$2,030,270,348	- 7.7%	\$8,641,430,299	- 6.4%
Turkey	\$140,211,517	- 0.2%	\$471,667,515	+ 1.8%	\$2,840,295,942	+ 0.7%
Lamb	\$27,861,546	- 1.6%	\$95,265,186	+ 4.4%	\$407,174,043	+ 3.6%
Veal	\$4,283,090	- 9.9%	\$15,127,069	- 6.7%	\$71,405,668	- 10.0%
Other*	\$45,627,618	+ 10.6%	\$146,355,269	+ 12.4%	\$575,658,561	- 0.9%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/27/16-07/24/16	% Change	WE 07/24/16	% Change	WE 07/24/16	% Change
TOTAL MEAT	1,084,924,652	+ 0.6%	3,488,324,024	+ 1.9%	14,727,148,254	+ 3.5%
Beef	391,024,771	+ 5.3%	1,246,251,592	+ 5.6%	4,869,988,864	+ 6.3%
Chicken	407,497,228	0.0%	1,309,687,173	+ 1.5%	5,069,926,119	+ 2.6%
Pork	229,041,718	- 6.0%	738,607,559	- 3.7%	3,240,828,490	+ 3.2%
Turkey	40,981,438	- 0.5%	139,093,788	+ 1.9%	1,326,683,188	- 0.7%
Lamb	3,823,500	+ 1.0%	13,361,652	+ 9.1%	57,416,210	+ 5.5%
Veal	608,687	- 6.1%	2,142,814	- 2.5%	10,139,743	- 11.9%
Other*	11,947,310	+ 11.4%	39,179,445	+ 14.9%	152,165,640	- 2.6%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/27/16-07/24/16	% Change	WE 07/24/16	% Change	WE 07/24/16	% Change
TOTAL MEAT	\$3.43	- 4.5%	\$3.43	- 4.7%	\$3.31	- 4.0%
Beef	\$4.92	- 9.0%	\$4.96	- 8.6%	\$5.02	- 5.6%
Chicken	\$2.31	- 0.1%	\$2.32	- 0.9%	\$2.33	- 1.0%
Pork	\$2.77	- 4.3%	\$2.75	- 4.2%	\$2.67	- 9.2%
Turkey	\$3.42	+ 0.3%	\$3.39	- 0.1%	\$2.14	+ 1.4%
Lamb	\$7.29	- 2.7%	\$7.13	- 4.3%	\$7.09	- 1.8%
Veal	\$7.04	- 4.0%	\$7.06	- 4.3%	\$7.04	+ 2.1%
Other*	\$3.82	- 0.7%	\$3.74	- 2.2%	\$3.78	+ 1.8%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Four Weeks Ending 07/24/16



Total US - Fresh Meat Feature and Promotion

July 2016

Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/27/16 - 7/24/16	% Change	WE 7/24/16	% Change	WE 7/24/16	% Change
TOTAL MEAT	975,043	8.1%	3,038,032	-0.2%	12,118,549	-1.1%
Beef	393,720	9.8%	1,246,540	4.1%	4,960,220	7.6%
Chicken	267,311	6.8%	804,376	-3.2%	3,013,680	-10.9%
Lamb	15,255	-5.2%	53,320	5.7%	276,565	9.2%
Pork	243,265	5.3%	767,520	-3.4%	2,929,850	2.8%
Turkey	52,162	24.5%	153,766	-3.7%	882,759	-20.7%
Veal	3,330	-11.2%	12,510	5.3%	55,475	11.4%

Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/27/16 - 7/24/16	% Change	WE 7/24/16	% Change	WE 7/24/16	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	40.4%	0.6%	41.0%	1.7%	40.9%	3.3%
Chicken	27.4%	-0.3%	26.5%	-0.8%	24.9%	-2.7%
Lamb	1.6%	-0.2%	1.8%	0.1%	2.3%	0.2%
Pork	24.9%	-0.7%	25.3%	-0.8%	24.2%	0.9%
Turkey	5.3%	0.7%	5.1%	-0.2%	7.3%	-1.8%
Veal	0.3%	-0.1%	0.4%	0.0%	0.5%	0.1%

Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/27/16 - 7/24/16	% Change	WE 7/24/16	% Change	WE 7/24/16	% Change
TOTAL MEAT	\$ 3.95	-5.2%	\$ 4.01	-4.1%	\$ 4.00	-3.5%
Beef	\$ 5.51	-8.8%	\$ 5.61	-8.3%	\$ 5.70	-5.5%
Chicken	\$ 2.67	7.1%	\$ 2.61	3.3%	\$ 2.60	-3.7%
Lamb	\$ 6.60	-12.0%	\$ 6.83	-8.3%	\$ 6.82	-5.8%
Pork	\$ 2.70	-5.9%	\$ 2.71	-4.1%	\$ 2.64	-12.4%
Turkey	\$ 3.56	0.1%	\$ 3.53	-1.6%	\$ 2.67	-3.9%
Veal	\$ 7.74	-11.1%	\$ 7.59	-12.6%	\$ 8.17	-2.8%

Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	6/27/16 - 7/24/16		WE 7/24/16		WE 7/24/16	
TOTAL MEAT	27.9%	\$ 3.08	28.6%	\$ 3.10	28.8%	\$ 2.87
Beef	30.6%	\$ 4.57	31.1%	\$ 4.65	30.4%	\$ 4.70
Chicken	22.0%	\$ 1.88	23.4%	\$ 1.90	24.0%	\$ 1.86
Lamb	31.7%	\$ 2.30	31.6%	\$ 2.31	31.7%	\$ 2.32
Pork	18.0%	\$ 2.99	20.9%	\$ 2.99	29.5%	\$ 1.37
Turkey	15.0%	\$ 5.86	19.7%	\$ 5.90	20.6%	\$ 5.82
Veal	17.0%	\$ 6.32	16.3%	\$ 6.35	15.3%	\$ 6.58

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

