

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

1. **Dollar Sales:** August beef dollar sales increased (+3.5%) versus the prior year. Chicken dollar sales increased (+4.5%) while pork dollar sales decreased (-1.7%). August total meat category dollar sales increased (+2.8%).
2. **Pound Sales:** August beef pound sales versus a year ago increased (+0.9%) and the total meat category decreased (-0.2%). Chicken pound sales decreased (-1.1%) versus a year ago and pork pounds decreased (-1.4%).
3. **Average Price:** August's average price per pound for beef increased seasonally (+2.5%) versus a year ago to \$5.03/lb., and up from July's average price of \$4.97/lb. Chicken price increased (+5.7%) and pork price decreased (-0.3%). Beef's average price per pound for the latest 52 weeks decreased (-3.7%), less than July's 52-week decrease (-5.0%).
4. **Feature Activity and Share:** August beef retail feature activity decreased (-6.0%). Ad activity increased for chicken (+12.4%) but decreased for pork (-9.4%). Beef ad share decreased (-1.6%) for August but it remains the most featured protein (40.1%) across all meat ads compared to chicken (31.2%) and pork (22.2%).
5. **Feature Price:** Average total meat feature price increased (+0.9%) in August. The average feature price increased for beef (+1.3%) and chicken (+8.4%) and decreased for pork (-1.7%). Beef volume sold on feature represented 28.3% of total August beef pound sales, a decrease from 30.7% for the latest 52 weeks.



Funded by the Beef Checkoff.

# Total US – Fresh Meat Sales

August 2017

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/31/17-08/27/17	% Change	WE 08/27/17	% Change	WE 08/27/17	% Change
<b>TOTAL MEAT</b>	<b>\$3,659,293,029</b>	<b>+ 2.8%</b>	<b>\$12,061,127,688</b>	<b>+ 2.3%</b>	<b>\$48,822,135,281</b>	<b>+ 0.3%</b>
Beef	\$1,873,393,276	+ 3.5%	\$6,224,105,922	+ 2.6%	\$24,335,230,427	- 0.1%
Chicken	\$983,997,209	+ 4.5%	\$3,177,879,119	+ 4.8%	\$12,283,175,287	+ 3.8%
Pork	\$574,706,394	- 1.7%	\$1,936,241,347	- 2.1%	\$8,290,540,206	- 3.6%
Turkey	\$152,084,170	+ 2.2%	\$475,148,248	+ 1.6%	\$2,854,182,231	+ 0.6%
Lamb	\$26,773,528	- 2.9%	\$88,182,828	- 3.1%	\$402,717,645	- 1.0%
Veal	\$4,280,132	- 5.1%	\$14,026,048	- 3.7%	\$66,504,488	- 6.4%
Other*	\$44,058,319	+ 2.0%	\$145,544,175	+ 0.5%	\$589,784,996	+ 1.6%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/31/17-08/27/17	% Change	WE 08/27/17	% Change	WE 08/27/17	% Change
<b>TOTAL MEAT</b>	<b>1,044,482,434</b>	<b>- 0.2%</b>	<b>3,476,083,557</b>	<b>+ 0.6%</b>	<b>15,108,379,941</b>	<b>+ 1.8%</b>
Beef	372,406,033	+ 0.9%	1,244,570,424	+ 1.2%	5,106,205,301	+ 3.8%
Chicken	405,256,495	- 1.1%	1,331,228,749	+ 0.6%	5,202,613,544	+ 1.7%
Pork	204,069,428	- 1.4%	703,722,962	- 0.7%	3,221,715,049	- 1.0%
Turkey	46,800,687	+ 3.9%	144,205,801	+ 4.1%	1,353,429,694	+ 1.7%
Lamb	3,446,921	- 9.2%	11,491,619	- 9.4%	56,877,144	- 1.9%
Veal	595,145	- 4.1%	1,960,813	- 2.8%	9,541,595	- 6.1%
Other*	11,907,724	+ 2.3%	38,903,190	- 0.1%	157,997,614	+ 1.6%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/31/17-08/27/17	% Change	WE 08/27/17	% Change	WE 08/27/17	% Change
<b>TOTAL MEAT</b>	<b>\$3.50</b>	<b>+ 3.0%</b>	<b>\$3.47</b>	<b>+ 1.6%</b>	<b>\$3.23</b>	<b>- 1.5%</b>
Beef	\$5.03	+ 2.5%	\$5.00	+ 1.4%	\$4.77	- 3.7%
Chicken	\$2.43	+ 5.7%	\$2.39	+ 4.1%	\$2.36	+ 2.0%
Pork	\$2.82	- 0.3%	\$2.75	- 1.4%	\$2.57	- 2.6%
Turkey	\$3.25	- 1.7%	\$3.29	- 2.3%	\$2.11	- 1.0%
Lamb	\$7.77	+ 6.9%	\$7.67	+ 6.9%	\$7.08	+ 0.9%
Veal	\$7.19	- 1.0%	\$7.15	- 0.9%	\$6.97	- 0.3%
Other*	\$3.70	- 0.3%	\$3.74	+ 0.6%	\$3.73	0.0%

\*Other includes Exotic, Non Meat and Unknown.

Sourced from IRI/FreshLook data, categorized by the VMMEAT® System  
Four Weeks Ending 08/27/17



# Total US - Fresh Meat Feature and Promotion

August 2017

## Feature Outlet Count - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/31/17 - 8/27/17	% Change	WE 8/27/17	% Change	WE 8/27/17	% Change
<b>TOTAL MEAT</b>	<b>936,538</b>	<b>-2.3%</b>	<b>3,104,181</b>	<b>-0.6%</b>	<b>12,909,677</b>	<b>5.9%</b>
Beef	375,540	-6.0%	1,238,525	-4.1%	5,222,980	4.5%
Chicken	292,407	12.4%	920,291	9.6%	3,347,202	11.1%
Lamb	10,655	-28.7%	34,810	-33.4%	223,195	-18.8%
Pork	207,685	-9.4%	737,935	-4.1%	3,010,670	2.0%
Turkey	44,791	-13.4%	155,040	-1.4%	1,034,995	15.3%
Veal	5,460	71.4%	17,580	51.2%	70,635	32.2%

## Feature Outlet Share - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/31/17 - 8/27/17	% Change	WE 8/27/17	% Change	WE 8/27/17	% Change
<b>TOTAL MEAT</b>	<b>100.0%</b>		<b>100.0%</b>		<b>100.0%</b>	
Beef	40.1%	-1.6%	39.9%	-1.5%	40.5%	-0.5%
Chicken	31.2%	4.1%	29.6%	2.7%	25.9%	1.2%
Lamb	1.1%	-0.4%	1.1%	-0.6%	1.7%	-0.5%
Pork	22.2%	-1.7%	23.8%	-0.9%	23.3%	-0.9%
Turkey	4.8%	-0.6%	5.0%	0.0%	8.0%	0.7%
Veal	0.6%	0.3%	0.6%	0.2%	0.5%	0.1%

## Feature Average Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/31/17 - 8/27/17	% Change	WE 8/27/17	% Change	WE 8/27/17	% Change
<b>TOTAL MEAT</b>	<b>\$ 3.97</b>	<b>0.9%</b>	<b>\$ 3.96</b>	<b>-0.9%</b>	<b>\$ 3.83</b>	<b>-3.7%</b>
Beef	\$ 5.49	1.3%	\$ 5.56	0.2%	\$ 5.40	-4.4%
Chicken	\$ 2.88	8.4%	\$ 2.82	5.3%	\$ 2.64	1.4%
Lamb	\$ 6.94	1.3%	\$ 7.12	3.5%	\$ 6.97	2.1%
Pork	\$ 2.62	-1.7%	\$ 2.60	-3.6%	\$ 2.53	-3.5%
Turkey	\$ 3.43	0.9%	\$ 3.42	-1.4%	\$ 2.67	-0.2%
Veal	\$ 7.58	-1.6%	\$ 7.27	-8.9%	\$ 7.23	-10.9%

## Promotion - Percent on Sale and Weighted Sale Price

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	7/31/17 - 8/27/17		WE 8/27/17		WE 8/27/17	
<b>TOTAL MEAT</b>	<b>25.9%</b>	<b>\$ 3.17</b>	<b>26.1%</b>	<b>\$ 3.07</b>	<b>28.6%</b>	<b>\$ 2.82</b>
Beef	28.3%	\$ 4.72	28.0%	\$ 4.56	30.7%	\$ 4.39
Chicken	21.8%	\$ 2.01	21.7%	\$ 1.94	22.6%	\$ 1.92
Lamb	26.8%	\$ 2.34	29.2%	\$ 2.29	31.1%	\$ 2.23
Pork	22.3%	\$ 2.69	22.2%	\$ 2.83	31.5%	\$ 1.39
Turkey	12.3%	\$ 6.42	12.3%	\$ 6.26	19.1%	\$ 5.81
Veal	13.8%	\$ 6.40	14.3%	\$ 6.06	15.3%	\$ 6.24

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

