

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

1. **Dollar Sales:** September beef dollar sales decreased (-4.8%) versus the prior year. Chicken dollar sales increased (+2.9%) while pork dollar sales decreased (-6.6%). The decline in September Beef dollar sales was greater than the decrease in total meat category dollar sales (-2.8%).
2. **Pound Sales:** September beef pound sales versus a year ago increased (+5.0%) while the total meat category increased (+2.9%). Chicken pound sales increased (+3.5%) versus a year ago while pork pounds decreased (-2.3%).
3. **Average Price:** August's average price per pound for beef decreased (-9.4%) versus a year ago to \$4.79/lb., down from August's average price of \$4.93/lb. Chicken price decreased (-0.5%) and pork price decreased (-4.4%). Beef's average price per pound for the latest 52 weeks decreased (-7.7%) compared to August's 52-week decrease (-6.7%).
4. **Feature Activity and Share:** September beef retail feature activity increased (+6.4%). Ad activity increased for chicken (+0.4%) and pork (+3.0%). Beef ad share increased (+6.7%) for the latest 52-week period and it remains the most featured protein (41.1%) of all meat ads compared to chicken (24.7%) and pork (24.1%).
5. **Feature Price:** Average total meat feature price decreased (-6.8%) in August. The average feature price decreased for beef (-10.4%), pork (-3.5%) and chicken (-4.3%). Beef volume sold on feature represented 32.8% of total September beef pound sales compared to 31.1% for the latest 52 weeks.



Funded by the Beef Checkoff.

Total US – Fresh Meat Sales

September 2016

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/22/16-09/25/16	% Change	WE 09/25/16	% Change	WE 09/25/16	% Change
TOTAL MEAT	\$4,550,497,828	- 2.8%	\$11,778,844,686	- 3.9%	\$48,480,442,108	- 1.9%
Beef	\$2,321,679,734	- 4.8%	\$6,036,969,797	- 5.2%	\$24,193,087,761	- 1.9%
Chicken	\$1,188,392,215	+ 2.9%	\$3,056,920,945	+ 0.8%	\$11,857,817,185	+ 1.3%
Pork	\$757,195,034	- 6.6%	\$1,963,293,288	- 8.5%	\$8,530,401,836	- 7.3%
Turkey	\$188,314,802	- 0.2%	\$473,929,893	- 0.3%	\$2,839,286,331	+ 0.5%
Lamb	\$34,365,688	+ 0.6%	\$89,468,340	- 0.8%	\$406,873,952	+ 2.5%
Veal	\$6,034,236	- 9.5%	\$14,692,921	- 10.7%	\$70,104,971	- 9.6%
Other*	\$54,516,119	+ 7.8%	\$143,569,502	+ 8.8%	\$582,870,071	+ 3.3%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/22/16-09/25/16	% Change	WE 09/25/16	% Change	WE 09/25/16	% Change
TOTAL MEAT	1,350,071,030	+ 2.9%	3,461,188,600	+ 1.6%	14,776,154,194	+ 3.2%
Beef	484,729,979	+ 5.0%	1,239,309,544	+ 4.5%	4,904,153,577	+ 6.2%
Chicken	512,386,764	+ 3.5%	1,320,408,151	+ 1.8%	5,093,999,385	+ 2.6%
Pork	275,229,561	- 2.3%	706,273,591	- 4.1%	3,225,045,749	+ 1.2%
Turkey	57,551,306	+ 4.7%	142,409,697	+ 2.2%	1,329,910,313	- 0.2%
Lamb	4,673,246	+ 1.4%	12,200,005	+ 1.1%	57,514,078	+ 4.9%
Veal	842,662	- 9.4%	2,070,931	- 8.1%	9,997,891	- 10.4%
Other*	14,657,511	+ 13.6%	38,516,682	+ 13.5%	155,533,200	+ 4.0%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/22/16-09/25/16	% Change	WE 09/25/16	% Change	WE 09/25/16	% Change
TOTAL MEAT	\$3.37	- 5.6%	\$3.40	- 5.4%	\$3.28	- 5.0%
Beef	\$4.79	- 9.4%	\$4.87	- 9.3%	\$4.93	- 7.7%
Chicken	\$2.32	- 0.5%	\$2.32	- 1.1%	\$2.33	- 1.3%
Pork	\$2.75	- 4.4%	\$2.78	- 4.6%	\$2.65	- 8.4%
Turkey	\$3.27	- 4.7%	\$3.33	- 2.4%	\$2.13	+ 0.7%
Lamb	\$7.35	- 0.8%	\$7.33	- 2.0%	\$7.07	- 2.3%
Veal	\$7.16	- 0.1%	\$7.09	- 2.9%	\$7.01	+ 0.8%
Other*	\$3.72	- 5.1%	\$3.73	- 4.2%	\$3.75	- 0.6%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Five Weeks Ending 09/25/16



Total US - Fresh Meat Feature and Promotion

September 2016

Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/22/16 - 9/25/16	% Change	WE 9/25/16	% Change	WE 9/25/16	% Change
TOTAL MEAT	1,248,013	4.5%	3,174,420	6.6%	12,242,427	-0.6%
Beef	522,690	6.4%	1,310,210	8.7%	5,030,560	6.7%
Chicken	322,095	0.4%	842,155	2.6%	3,018,242	-8.5%
Lamb	19,370	-2.7%	48,865	-5.9%	274,335	4.8%
Pork	310,160	3.0%	789,235	5.1%	2,955,820	1.7%
Turkey	67,658	21.0%	171,290	28.1%	910,070	-15.7%
Veal	6,040	2.2%	12,665	-16.5%	53,400	2.4%

Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/22/16 - 9/25/16	% Change	WE 9/25/16	% Change	WE 9/25/16	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	41.9%	0.8%	41.3%	0.8%	41.1%	2.8%
Chicken	25.8%	-1.0%	26.5%	-1.0%	24.7%	-2.1%
Lamb	1.6%	-0.1%	1.5%	-0.2%	2.2%	0.1%
Pork	24.9%	-0.3%	24.9%	-0.4%	24.1%	0.5%
Turkey	5.4%	0.7%	5.4%	0.9%	7.4%	-1.3%
Veal	0.5%	0.0%	0.4%	-0.1%	0.4%	0.0%

Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/22/16 - 9/25/16	% Change	WE 9/25/16	% Change	WE 9/25/16	% Change
TOTAL MEAT	\$ 3.86	-6.8%	\$ 3.93	-5.8%	\$ 3.96	-4.5%
Beef	\$ 5.33	-10.4%	\$ 5.44	-9.6%	\$ 5.59	-7.3%
Chicken	\$ 2.47	-4.3%	\$ 2.63	2.8%	\$ 2.60	-2.3%
Lamb	\$ 6.89	3.5%	\$ 6.83	-3.1%	\$ 6.83	-5.3%
Pork	\$ 2.63	-3.5%	\$ 2.66	-5.0%	\$ 2.62	-10.7%
Turkey	\$ 3.57	2.3%	\$ 3.52	-1.0%	\$ 2.69	-2.0%
Veal	\$ 7.07	-6.1%	\$ 7.56	-10.3%	\$ 8.01	-5.7%

Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	8/22/16 - 9/25/16		WE 9/25/16		WE 9/25/16	
TOTAL MEAT	29.6%	\$ 2.97	28.7%	\$ 3.03	29.3%	\$ 2.86
Beef	32.8%	\$ 4.37	31.4%	\$ 4.53	31.3%	\$ 4.61
Chicken	23.2%	\$ 1.83	22.9%	\$ 1.85	23.8%	\$ 1.85
Lamb	33.5%	\$ 2.24	32.3%	\$ 2.31	32.1%	\$ 2.31
Pork	20.7%	\$ 2.69	20.4%	\$ 2.79	30.1%	\$ 1.38
Turkey	15.7%	\$ 6.48	16.3%	\$ 6.33	21.1%	\$ 5.87
Veal	14.5%	\$ 7.55	15.8%	\$ 6.83	15.3%	\$ 6.63

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

