

Retail Beef Performance
FreshLook Marketing and USDA Market News
December 2013 Highlights

1. December dollar sales for beef decreased slightly (-0.7%) versus the prior year. Chicken increased slightly (+0.4%) and pork increased (+6.7%) in dollar sales. Beef's change in dollar sales for November is considerably higher than total meat category dollar sales (-3.4%) for the latest month. Beef's percent change has been showing positive growth for the latest 4-, 13- and 52-week periods.
2. December pound sales for beef versus a year ago also decreased slightly (-2.8%) compared to an increase in the total meat category (+12.6%). Pork pound sales increased (+6.0%) while chicken pounds decreased (-4.5%) in December.
3. December's average price per pound for beef increased versus a year ago (+2.2%) to \$4.54/lb. The rise in beef is lower compared to the increase for chicken (+5.1%) while average pork prices increased slightly (+0.6%). The average price per pound for beef is running greater (+2.2%) than the like period from the prior year for the latest 52-week period.
4. Retail feature activity decreased in December for beef (-4.3%) which compared to a comparable decrease in ad activity for chicken (-4.0%) and an increase in pork (+2.3%). Beef has slightly lost ad share (-1.7%) for the latest 52-week period but remains the most featured protein in December (38.3% of all meat ads).
5. Average feature price for total meat increased slightly (+0.3%) in December. The average feature price of beef increased (+1.4%) compared to a slight increase in chicken (+5.5%) and a decline in pork (-1.1%). Beef volume sold on feature represents 31.0% of total December pound sales.



Total US – Fresh Meat Sales

December 2013

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13-12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	\$4,770,706,320	+ 6.3%	\$11,877,293,021	+ 2.1%	\$44,585,578,292	+ 2.7%
Beef	\$2,104,247,216	- 0.7%	\$5,412,233,492	+ 2.3%	\$21,806,703,453	+ 1.8%
Chicken	\$896,896,536	+ 0.4%	\$2,543,063,104	+ 6.4%	\$10,686,314,360	+ 7.0%
Pork	\$1,129,594,503	+ 6.7%	\$2,452,858,967	0.0%	\$8,710,642,902	+ 0.7%
Turkey	\$536,166,617	+ 73.4%	\$1,229,322,289	- 2.6%	\$2,518,683,266	- 0.7%
Lamb	\$41,098,623	+ 6.8%	\$89,058,821	+ 6.5%	\$337,072,838	+ 6.5%
Veal	\$9,041,126	- 6.3%	\$23,511,565	- 3.8%	\$88,782,446	- 2.9%
Other*	\$53,661,698	- 9.2%	\$127,244,783	- 3.8%	\$437,379,027	+ 2.4%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13-12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	1,729,085,627	+ 12.6%	4,234,705,237	- 0.4%	14,463,899,833	+ 0.6%
Beef	463,740,104	- 2.8%	1,231,111,665	+ 0.7%	4,939,057,232	- 0.3%
Chicken	396,909,767	- 4.5%	1,124,821,245	+ 0.2%	4,772,228,264	+ 0.6%
Pork	477,021,439	+ 6.0%	960,157,102	- 2.2%	3,263,055,439	+ 2.0%
Turkey	366,300,611	+ 117%	858,889,589	- 1.3%	1,286,070,621	- 0.8%
Lamb	6,279,837	+ 8.2%	13,147,342	+ 5.7%	49,110,210	+ 9.0%
Veal	1,432,074	+ 0.9%	3,601,850	+ 2.3%	13,147,629	+ 0.3%
Other*	17,401,796	- 0.1%	42,976,444	+ 9.4%	141,230,437	+ 9.6%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13-12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	\$2.76	- 5.6%	\$2.80	+ 2.5%	\$3.08	+ 2.1%
Beef	\$4.54	+ 2.2%	\$4.40	+ 1.6%	\$4.42	+ 2.2%
Chicken	\$2.26	+ 5.1%	\$2.26	+ 6.2%	\$2.24	+ 6.4%
Pork	\$2.37	+ 0.6%	\$2.55	+ 2.3%	\$2.67	- 1.2%
Turkey	\$1.46	- 20.2%	\$1.43	- 1.3%	\$1.96	+ 0.1%
Lamb	\$6.54	- 1.3%	\$6.77	+ 0.8%	\$6.86	- 2.3%
Veal	\$6.31	- 7.2%	\$6.53	- 6.0%	\$6.75	- 3.2%
Other*	\$3.08	- 9.1%	\$2.96	- 12.1%	\$3.10	- 6.6%

*Other includes Exotic, Non Meat and Unknown.

Sourced from FreshLook data, categorized by the VMMEAT® System
Five Weeks Ending 12/29/13



Total US - Fresh Meat Feature and Promotion

December 2013

Feature Outlet Count - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13 - 12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	1,332,360	0.8%	3,496,520	1.2%	13,380,580	-0.4%
Beef	505,800	-4.3%	1,288,510	-4.5%	5,129,350	-4.6%
Chicken	295,370	-4.0%	831,280	2.6%	3,725,710	-2.5%
Lamb	66,490	21.0%	109,000	3.5%	305,200	1.2%
Pork	281,910	2.3%	728,670	2.6%	3,054,910	5.0%
Turkey	175,910	19.7%	520,035	13.7%	1,082,165	20.3%
Veal	6,880	-15.5%	19,025	-24.3%	83,245	-31.3%

Feature Outlet Share - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13 - 12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	100.0%		100.0%		100.0%	
Beef	38.0%	-2.0%	36.9%	-2.2%	38.3%	-1.7%
Chicken	22.2%	-1.1%	23.8%	0.3%	27.8%	-0.6%
Lamb	5.0%	0.8%	3.1%	0.1%	2.3%	0.0%
Pork	21.2%	0.3%	20.8%	0.3%	22.8%	1.2%
Turkey	13.2%	2.1%	14.9%	1.6%	8.1%	1.4%
Veal	0.5%	-0.1%	0.5%	-0.2%	0.6%	-0.3%

Feature Average Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13 - 12/29/13	% Change	WE 12/29/13	% Change	WE 12/29/13	% Change
TOTAL MEAT	\$ 3.93	0.3%	\$ 3.64	-2.1%	\$ 3.69	-1.3%
Beef	\$ 5.49	1.4%	\$ 5.13	-1.8%	\$ 5.03	-0.8%
Chicken	\$ 2.58	5.5%	\$ 2.53	5.2%	\$ 2.52	5.1%
Lamb	\$ 7.18	0.0%	\$ 7.06	-0.5%	\$ 6.94	-0.3%
Pork	\$ 2.86	-1.1%	\$ 2.77	-2.4%	\$ 2.77	-4.1%
Turkey	\$ 2.08	-1.0%	\$ 2.06	6.5%	\$ 2.71	4.1%
Veal	\$ 6.29	-18.1%	\$ 7.14	-6.6%	\$ 7.38	-1.4%

Promotion - Percent on Sale and Weighted Sale Price

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/25/13 - 12/29/13		WE 12/29/13		WE 12/29/13	
TOTAL MEAT	29.6%	\$ 2.54	30.3%	\$ 2.36	29.4%	\$ 2.72
Beef	31.0%	\$ 4.57	30.5%	\$ 4.22	30.0%	\$ 4.15
Chicken	23.8%	\$ 1.96	26.3%	\$ 1.91	27.3%	\$ 1.89
Lamb	27.6%	\$ 2.46	28.6%	\$ 2.44	31.3%	\$ 2.42
Pork	36.5%	\$ 1.15	41.4%	\$ 1.07	29.7%	\$ 1.30
Turkey	29.4%	\$ 5.26	23.9%	\$ 5.54	21.8%	\$ 5.66
Veal	15.4%	\$ 6.42	16.2%	\$ 6.25	14.8%	\$ 6.35

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

