

FreshLook and Promodata December 2009 Highlights

1. December dollar sales for beef (-1.5%) were slightly down versus the prior year which was driven by a decline in average price. Chicken dollar sales remained steady (0.0%) while pork experienced a decline (-4.5%). Beef's decline in dollar sales is slightly less than the decline in total meat category sales (-2.2%) for the latest month. Beef's percent change has been consistent to the total meat category changes for the latest 13 and 52 week periods.
2. Pound sales for beef (+4.7%) exceeded the growth for the total meat category (+2.7%) and both chicken (+4.2%) and pork's growth (+2.0%). Beef's pound sales have grown strongly versus year ago periods, registering a 6.6% increase for the quarter and a 6.9% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-6.0%) to \$3.58/lb. This decrease is greater than the decline for chicken (-4.0%) but less than the pork decline (-6.4%). The average price per pound for beef is running below the like period from the prior year for the latest 4, 13 and 52 week periods.
4. Retail feature activity increased significantly in December for beef (+3.9%) which is greater than activity for both chicken (-5.5%) and pork total ads (+3.8%). Beef has gained ad share for all reporting periods and maintains 38.03% to 42.99% of all meat ads.
5. "A" ad activity for total meat decreased (-4.7%) for December. Beef "A" ads slightly declined (-2.2%) compared to a similar decline in chicken (-1.2%) and significant decline in pork (-12.2%). Despite the decline, beef still represents the largest share (40.99%) of all "A" ad activity.

Total US – Fresh Meat Sales

December 2009

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/23/09-12/27/09	% Change	WE 12/27/09	% Change	WE 12/27/09	% Change
TOTAL MEAT	\$3,056,806,569	- 2.2%	\$7,778,069,776	- 1.8%	\$30,394,640,003	+ 2.9%
Beef	\$1,427,428,384	- 1.5%	\$3,766,654,524	- 2.1%	\$15,908,836,230	+ 3.0%
Chicken	\$535,161,707	0.0%	\$1,545,457,170	0.0%	\$6,662,967,352	+ 3.5%
Pork	\$722,166,722	- 4.5%	\$1,626,714,158	- 2.2%	\$5,970,111,859	+ 2.8%
Turkey	\$307,222,998	- 4.8%	\$689,263,954	- 4.7%	\$1,318,128,955	+ 1.0%
Lamb	\$31,371,964	+ 8.8%	\$70,578,720	+ 6.9%	\$272,197,102	+ 1.8%
Veal	\$8,408,326	- 2.3%	\$23,502,783	+ 1.1%	\$87,670,664	- 2.2%
Other*	\$25,046,468	+ 4.2%	\$55,898,468	+ 3.5%	\$174,727,841	+ 3.3%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/23/09-12/27/09	% Change	WE 12/27/09	% Change	WE 12/27/09	% Change
TOTAL MEAT	1,283,979,506	+ 2.7%	3,267,531,064	+ 5.1%	11,419,051,839	+ 7.2%
Beef	398,202,094	+ 4.7%	1,088,738,788	+ 6.6%	4,474,604,422	+ 6.9%
Chicken	269,506,662	+ 4.2%	793,807,025	+ 4.0%	3,382,231,016	+ 7.1%
Pork	352,604,739	+ 2.0%	752,140,638	+ 8.4%	2,549,753,179	+ 9.5%
Turkey	246,870,630	- 1.2%	594,987,581	+ 0.4%	879,067,454	+ 3.3%
Lamb	5,828,372	+ 13.7%	13,080,527	+ 13.8%	49,652,554	- 0.2%
Veal	1,236,845	+ 1.0%	3,522,968	+ 7.0%	12,792,729	- 0.5%
Other*	9,730,164	- 3.4%	21,253,537	- 2.6%	70,950,484	+ 1.1%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	11/23/09-12/27/09	% Change	WE 12/27/09	% Change	WE 12/27/09	% Change
TOTAL MEAT	\$2.38	- 4.7%	\$2.38	- 6.6%	\$2.66	- 4.0%
Beef	\$3.58	- 6.0%	\$3.46	- 8.2%	\$3.56	- 3.7%
Chicken	\$1.99	- 4.0%	\$1.95	- 3.8%	\$1.97	- 3.4%
Pork	\$2.05	- 6.4%	\$2.16	- 9.7%	\$2.34	- 6.2%
Turkey	\$1.24	- 3.7%	\$1.16	- 5.1%	\$1.50	- 2.2%
Lamb	\$5.38	- 4.4%	\$5.40	- 6.0%	\$5.48	+ 2.0%
Veal	\$6.80	- 3.2%	\$6.67	- 5.5%	\$6.85	- 1.7%
Other*	\$2.57	+ 8.0%	\$2.63	+ 6.3%	\$2.46	+ 2.1%

*Other includes Exotic, Non Meat, Vegetables and Unclassified.

Sourced from FreshLook Data – Five Weeks Ending 12/27/09



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
December 2009

Ad Count - Total						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(11/22/09 - 12/26/2009)	% Chg	WE (12/26/09)	% Chg	WE (12/26/09)	% Chg
TOTAL MEAT	28201	-0.2%	77242	3.3%	294200	5.4%
Beef	10724	3.9%	30179	6.2%	126473	5.9%
Chicken	4400	-5.5%	14082	0.3%	64491	4.8%
Pork	9341	-3.8%	22484	1.7%	76065	4.6%
Turkey	2536	-0.3%	7630	-2.1%	18067	2.9%
Lamb	954	14.1%	2054	17.9%	6090	1.6%
Veal	246	22.4%	813	22.6%	3014	51.8%

Ad Count - "A"						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(11/22/09 - 12/26/2009)	% Chg	WE (12/26/09)	% Chg	WE (12/26/09)	% Chg
TOTAL MEAT	13020	-4.7%	36021	0.9%	135139	2.4%
Beef	5337	-2.2%	14710	0.7%	63567	1.0%
Chicken	1873	-1.2%	6161	2.7%	29762	5.6%
Pork	4259	-12.2%	10197	0.4%	33027	2.0%
Turkey	1372	9.4%	4477	-1.8%	7478	5.0%
Lamb	178	-12.3%	397	24.5%	1049	-11.7%
Veal	1	-90.0%	79	14.5%	256	44.6%

Ad Share - Total						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(11/22/09 - 12/26/2009)	Pt Chg	WE (12/26/09)	Pt Chg	WE (12/26/09)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	38.03%	1.5 Pts	39.07%	1.1 Pts	42.99%	0.2 Pts
Chicken	15.6%	-0.9 Pts	18.23%	-0.5 Pts	21.92%	-0.1 Pts
Pork	33.12%	-1.2 Pts	29.11%	-0.5 Pts	25.85%	-0.2 Pts
Turkey	8.99%	0.0 Pts	9.88%	-0.5 Pts	6.14%	-0.1 Pts
Lamb	3.38%	0.4 Pts	2.66%	0.3 Pts	2.07%	-0.1 Pts
Veal	0.87%	0.2 Pts	1.05%	0.2 Pts	1.02%	0.3 Pts

Category Average Advertised Price/LB - Total (2 Yrs)¹						
	5 WEEKS		13 WEEKS		52 WEEKS	
Class	(11/22/09 - 12/26/2009)	% Chg	WE (12/26/09)	% Chg	WE (12/26/09)	% Chg
TOTAL MEAT	\$3.41	-4.7%	\$3.31	-6.6%	\$3.37	-3.7%
Beef	\$4.79	-6.6%	\$4.55	-7.5%	\$4.41	-4.2%
Chicken	\$2.13	-1.2%	\$2.14	-3.2%	\$2.14	-0.5%
Pork	\$2.41	-9.5%	\$2.43	-12.1%	\$2.55	-6.6%
Turkey	\$1.71	-13.4%	\$1.84	-5.7%	\$2.30	-2.3%
Lamb	\$5.93	-4.1%	\$5.88	-4.8%	\$5.90	0.2%
Veal	\$7.42	-3.7%	\$6.68	-10.6%	\$6.56	-10.6%

¹Average Advertised Price/Lb does not account for volume. It represents an average of prices of all featured items by category.

* Excludes "Bacon", "Hot Dogs", "Meals and Entrees", "Prepared Meat", and "Sausage, Breakfast"

