

## **FreshLook and Promodata February 2010 Highlights**

1. February dollar sales for beef (-2.2%) were down versus the prior year, which was mainly driven by a decline in average price. Chicken dollar sales declined (-1.0%) while pork experienced a greater decline (-4.5%). Beef's decline in dollar sales is slightly less than the decline in total meat category sales (-2.4%) 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 (+3.3%) out paced the growth for the total meat category (+0.9%) and was higher than chicken pound sales growth (+1.4%). Pork pounds decreased (-2.6%). Beef's pound sales have grown strongly versus year ago periods, registering a 3.8% increase for the quarter and a 6.6% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-5.3%) to \$3.49/lb. This decrease is greater than the decline for chicken (-2.4%) and pork (-2.0%). 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 January for beef (+3.7%) which is greater than activity for both chicken (-0.1%) and pork total ads (-10.6%). Beef has gained ad share for all reporting periods and maintains 42.89% to 47.12% of all meat ads.
5. "A" ad activity for total meat decreased (-9.7%) for February. Beef "A" ads declined (-6.7%) compared to a smaller decline in chicken (-3.7%) and a significant decline in pork (-17.8%). Despite the decline, beef still represents the largest share (52.45%) of all "A" ad activity.

# Total US – Fresh Meat Sales

February 2010

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/25/10-02/21/10	% Change	WE 02/21/10	% Change	WE 02/21/10	% Change
<b>TOTAL MEAT</b>	<b>\$2,298,677,267</b>	<b>- 2.4%</b>	<b>\$7,688,466,371</b>	<b>- 2.2%</b>	<b>\$30,288,084,853</b>	<b>+ 1.2%</b>
Beef	\$1,234,021,151	- 2.2%	\$3,878,949,573	- 2.3%	\$15,840,064,697	+ 1.2%
Chicken	\$526,983,627	- 1.0%	\$1,604,756,763	- 1.0%	\$6,647,036,445	+ 2.0%
Pork	\$429,517,429	- 4.5%	\$1,610,330,754	- 3.3%	\$5,949,586,650	+ 0.8%
Turkey	\$64,559,300	- 6.0%	\$441,078,280	- 4.5%	\$1,312,669,084	- 0.4%
Lamb	\$20,087,398	+ 1.4%	\$73,162,059	+ 5.2%	\$273,308,064	+ 1.8%
Veal	\$7,733,246	- 2.5%	\$24,023,611	- 0.9%	\$87,649,377	- 1.7%
Other*	\$15,775,115	+ 14.4%	\$56,165,331	+ 7.8%	\$177,770,537	+ 2.7%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/25/10-02/21/10	% Change	WE 02/21/10	% Change	WE 02/21/10	% Change
<b>TOTAL MEAT</b>	<b>840,006,444</b>	<b>+ 0.9%</b>	<b>3,007,380,794</b>	<b>+ 2.5%</b>	<b>11,459,819,555</b>	<b>+ 6.3%</b>
Beef	353,631,839	+ 3.3%	1,112,362,555	+ 3.8%	4,497,736,759	+ 6.6%
Chicken	271,491,420	+ 1.4%	822,354,869	+ 2.6%	3,392,486,425	+ 5.9%
Pork	176,707,555	- 2.6%	727,463,144	+ 2.2%	2,558,598,420	+ 8.1%
Turkey	27,649,111	- 10.2%	306,717,254	- 1.8%	876,459,445	+ 2.4%
Lamb	3,662,733	+ 5.3%	13,537,454	+ 10.0%	50,183,767	+ 1.8%
Veal	1,139,194	+ 0.3%	3,547,700	+ 2.6%	12,870,245	+ 1.4%
Other*	5,724,593	+ 7.6%	21,397,818	+ 0.9%	71,484,494	0.0%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	01/25/10-02/21/10	% Change	WE 02/21/10	% Change	WE 02/21/10	% Change
<b>TOTAL MEAT</b>	<b>\$2.74</b>	<b>- 3.2%</b>	<b>\$2.56</b>	<b>- 4.6%</b>	<b>\$2.64</b>	<b>- 4.8%</b>
Beef	\$3.49	- 5.3%	\$3.49	- 5.9%	\$3.52	- 5.0%
Chicken	\$1.94	- 2.4%	\$1.95	- 3.5%	\$1.96	- 3.7%
Pork	\$2.43	- 2.0%	\$2.21	- 5.4%	\$2.33	- 6.7%
Turkey	\$2.33	+ 4.6%	\$1.44	- 2.8%	\$1.50	- 2.7%
Lamb	\$5.48	- 3.7%	\$5.40	- 4.4%	\$5.45	+ 0.1%
Veal	\$6.79	- 2.7%	\$6.77	- 3.4%	\$6.81	- 3.1%
Other*	\$2.76	+ 6.3%	\$2.62	+ 6.9%	\$2.49	+ 2.7%

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



Sourced from FreshLook Data – Four Weeks Ending 02/21/10

Funded by The Beef Checkoff

Ad Count - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(1/24/10 - 2/20/10)	% Chg	WE (2/20/10)	% Chg	WE (2/20/10)	% Chg
<b>TOTAL MEAT</b>	<b>21076</b>	<b>-1.6%</b>	<b>70859</b>	<b>-0.2%</b>	<b>294100</b>	<b>5.0%</b>
Beef	9930	3.7%	30393	4.5%	127375	6.1%
Chicken	4896	-0.1%	14577	-2.2%	64421	4.3%
Pork	4779	-10.6%	19212	-5.4%	75343	3.4%
Turkey	833	-13.2%	4211	-6.0%	17805	2.0%
Lamb	399	-8.7%	1745	7.5%	6093	2.3%
Veal	239	13.8%	721	15.0%	3063	41.5%

Ad Count - "A"						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(1/24/10 - 2/20/10)	% Chg	WE (2/20/10)	% Chg	WE (2/20/10)	% Chg
<b>TOTAL MEAT</b>	<b>9210</b>	<b>-9.7%</b>	<b>31874</b>	<b>-5.3%</b>	<b>133992</b>	<b>1.3%</b>
Beef	4831	-6.7%	14887	-2.9%	63243	0.2%
Chicken	2250	-3.7%	6609	-3.9%	29519	4.3%
Pork	1903	-17.8%	8286	-11.3%	32565	0.6%
Turkey	198	-22.0%	1821	4.7%	7442	5.1%
Lamb	24	-74.5%	252	-25.0%	990	-16.3%
Veal	4	-80.0%	19	-62.7%	233	8.4%

Ad Share - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(1/24/10 - 2/20/10)	Pt Chg	WE (2/20/10)	Pt Chg	WE (2/20/10)	Pt Chg
<b>TOTAL MEAT</b>	<b>100.0%</b>	<b>0.0 Pts</b>	<b>100.0%</b>	<b>0.0 Pts</b>	<b>100.0%</b>	<b>0.0 Pts</b>
Beef	47.12%	2.4 Pts	42.89%	1.9 Pts	43.31%	0.5 Pts
Chicken	23.23%	0.4 Pts	20.57%	-0.4 Pts	21.9%	-0.1 Pts
Pork	22.68%	-2.3 Pts	27.11%	-1.5 Pts	25.62%	-0.4 Pts
Turkey	3.95%	-0.5 Pts	5.94%	-0.4 Pts	6.05%	-0.2 Pts
Lamb	1.89%	-0.1 Pts	2.46%	0.2 Pts	2.07%	-0.1 Pts
Veal	1.13%	0.2 Pts	1.02%	0.1 Pts	1.04%	0.3 Pts

Category Average Advertised Price/LB - Total ( 2 Yrs ) <sup>1</sup>						
	4 WEEKS		13 WEEKS		52 WEEKS	
Class	(1/24/10 - 2/20/10)	% Chg	WE (2/20/10)	% Chg	WE (2/20/10)	% Chg
<b>TOTAL MEAT</b>	<b>\$3.39</b>	<b>-4.3%</b>	<b>\$3.37</b>	<b>-4.3%</b>	<b>\$3.35</b>	<b>-4.8%</b>
Beef	\$4.28	-7.9%	\$4.45	-6.0%	\$4.38	-5.5%
Chicken	\$2.06	-3.6%	\$2.11	-3.4%	\$2.13	-2.0%
Pork	\$2.55	-2.9%	\$2.45	-7.9%	\$2.53	-7.9%
Turkey	\$2.72	3.7%	\$2.12	-7.0%	\$2.30	-2.2%
Lamb	\$6.66	10.2%	\$5.99	-1.3%	\$5.92	-0.8%
Veal	\$6.95	0.1%	\$6.89	-1.9%	\$6.55	-8.9%

<sup>1</sup>Average 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"

