

FreshLook and Promodata July 2009 Highlights

1. In July, dollar sales for beef (+3.4%) rose at nearly the same level as total meat (+3.5%) and pork (+3.3%) and just below chicken (+4.8%). Beef's dollar sales for the past year are now running ahead of the previous 52 weeks by 4.4%.
2. Pound sales in the period were up (+9.0%) over July 2008, and, while pound volume was strong, it was not up as much as chicken (+11.1%) or pork (+14.3%). Beef pound volume for the past year is running ahead of the prior 52-week period by 3.5%.
3. The increased pound volume at retail has been generated while prices have fallen. Total meat prices for the month (-6.2%) are down more than beef (-5.2%) and chicken (-5.7%) but less than pork (-9.6%).
4. Retail featuring for beef in July (+1.8%) advanced but at a slower pace than either chicken (+12.6%) or pork (+12.7%). Beef featuring at retail remains strong with increased featuring activity in the month, quarter and 52-week periods versus the like reporting period from the prior year.
5. In July A features (most dominant ad on the page) increased (+1.8%) which was at a slower pace than chicken (+7.2%). However, beef continues to hold the dominant share of A ads in July at 51.3% compared to chicken's 24.0% share.

Total US – Fresh Meat Sales

July 2009

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/29/09-07/26/09	% Change	WE 07/26/09	% Change	WE 07/26/09	% Change
TOTAL MEAT	\$2,333,399,594	+ 3.5%	\$7,549,296,189	+ 2.8%	\$30,399,013,591	+ 4.8%
Beef	\$1,269,846,304	+ 3.4%	\$4,131,176,594	+ 2.9%	\$15,901,179,229	+ 4.4%
Chicken	\$533,087,892	+ 4.8%	\$1,714,293,528	+ 3.7%	\$6,641,460,240	+ 6.3%
Pork	\$445,248,425	+ 3.3%	\$1,411,935,075	+ 1.6%	\$5,986,241,607	+ 5.1%
Turkey	\$51,875,246	+ 2.0%	\$177,626,165	+ 4.1%	\$1,339,956,696	+ 2.9%
Lamb	\$17,076,488	- 4.8%	\$59,034,582	- 2.3%	\$268,022,975	- 2.1%
Veal	\$5,374,450	- 6.6%	\$18,915,956	- 3.7%	\$88,573,645	- 6.4%
Other*	\$10,890,790	- 4.0%	\$36,314,289	- 1.9%	\$173,579,199	+ 8.5%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/29/09-07/26/09	% Change	WE 07/26/09	% Change	WE 07/26/09	% Change
TOTAL MEAT	841,780,099	+ 10.4%	2,678,897,657	+ 5.8%	11,044,667,313	+ 4.7%
Beef	355,015,733	+ 9.0%	1,141,971,686	+ 5.4%	4,316,443,729	+ 3.5%
Chicken	275,337,569	+ 11.1%	869,470,703	+ 6.7%	3,292,014,686	+ 7.5%
Pork	181,956,540	+ 14.3%	565,226,743	+ 6.2%	2,439,123,732	+ 6.5%
Turkey	21,009,701	+ 0.8%	73,799,488	+ 3.1%	864,698,165	- 2.6%
Lamb	2,884,896	- 9.9%	10,207,837	- 7.3%	48,052,199	- 9.0%
Veal	772,102	- 8.1%	2,736,282	- 2.2%	12,662,046	- 13.6%
Other*	4,803,557	- 4.0%	15,484,919	- 3.0%	71,672,755	+ 7.0%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	06/29/09-07/26/09	% Change	WE 07/26/09	% Change	WE 07/26/09	% Change
TOTAL MEAT	\$2.77	- 6.2%	\$2.82	- 2.8%	\$2.75	+ 0.1%
Beef	\$3.58	- 5.2%	\$3.62	- 2.3%	\$3.68	+ 0.9%
Chicken	\$1.94	- 5.7%	\$1.97	- 2.8%	\$2.02	- 1.1%
Pork	\$2.45	- 9.6%	\$2.50	- 4.3%	\$2.45	- 1.4%
Turkey	\$2.47	+ 1.2%	\$2.41	+ 1.0%	\$1.55	+ 5.7%
Lamb	\$5.92	+ 5.6%	\$5.78	+ 5.4%	\$5.58	+ 7.6%
Veal	\$6.96	+ 1.6%	\$6.91	- 1.6%	\$7.00	+ 8.3%
Other*	\$2.27	0.0%	\$2.35	+ 1.1%	\$2.42	+ 1.4%

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

Sourced from FreshLook Data – Four Weeks Ending 07/26/09



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
July 2009

Ad Count - Total						
CLASS	4 WEEKS		13 WEEKS		52 WEEKS	
	(6/28/09 - 7/25/09)	% Chg	WE (7/25/09)	% Chg	WE (7/25/09)	% Chg
TOTAL MEAT	21978	6.9%	71707	6.3%	284425	2.0%
Beef	9966	1.8%	32596	3.8%	121807	2.4%
Chicken	5347	12.6%	17036	9.1%	62473	3.7%
Pork	4545	12.7%	14908	9.3%	56095	2.0%
Turkey	1006	18.6%	3152	14.2%	17826	2.7%
Ham	619	-5.2%	2178	-8.3%	17968	-8.4%
Lamb	305	-12.6%	1091	-9.7%	5605	-6.4%
Veal	190	31.9%	746	65.0%	2651	58.7%

Ad Count - "A"						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(6/28/09 - 7/25/09)	% Chg	WE (7/25/09)	% Chg	WE (7/25/09)	% Chg
TOTAL MEAT	9869	3.3%	32199	2.6%	132517	-0.1%
Beef	5071	1.8%	16582	-0.1%	62656	-0.4%
Chicken	2364	7.2%	7718	8.5%	28656	3.2%
Pork	2036	1.9%	6523	3.5%	24774	-0.9%
Turkey	259	38.5%	779	41.4%	7340	6.4%
Ham	112	1.8%	449	-16.1%	7960	-6.7%
Lamb	18	-64.0%	99	-52.2%	903	-32.6%
Veal	9	-55.0%	49	-31.0%	228	27.4%

Ad Share - Total						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(6/28/09 - 7/25/09)	Pt Chg	WE (7/25/09)	Pt Chg	WE (7/25/09)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	45.35%	-2.2 Pts	45.46%	-1.1 Pts	42.83%	0.2 Pts
Chicken	24.33%	1.2 Pts	23.76%	0.6 Pts	21.96%	0.4 Pts
Pork	20.68%	1.1 Pts	20.79%	0.6 Pts	19.72%	0.0 Pts
Turkey	4.58%	0.5 Pts	4.4%	0.3 Pts	6.27%	0.0 Pts
Ham	2.82%	-0.4 Pts	3.04%	-0.5 Pts	6.32%	-0.7 Pts
Lamb	1.39%	-0.3 Pts	1.52%	-0.3 Pts	1.97%	-0.2 Pts
Veal	0.86%	0.2 Pts	1.04%	0.4 Pts	0.93%	0.3 Pts

Category Average Advertised Price/LB - Total (2 Yrs)¹						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(6/28/09 - 7/25/09)	% Chg	WE (7/25/09)	% Chg	WE (7/25/09)	% Chg
TOTAL MEAT	\$3.35	-6.2%	\$3.39	-4.3%	\$3.49	2.9%
Beef	\$4.26	-6.7%	\$4.34	-4.3%	\$4.58	2.7%
Chicken	\$2.16	2.1%	\$2.14	0.8%	\$2.17	3.5%
Pork	\$2.57	-10.0%	\$2.59	-6.7%	\$2.72	2.1%
Turkey	\$2.97	8.1%	\$2.80	2.7%	\$2.37	3.9%
Ham	\$2.64	-10.1%	\$2.67	-6.0%	\$2.66	3.4%
Lamb	\$6.14	5.8%	\$6.15	0.8%	\$6.01	6.4%
Veal	\$6.61	-1.1%	\$6.25	-9.2%	\$6.77	-6.5%

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"

