

**FreshLook and Promodata  
June 2009 Highlights**

1. In June, beef dollar sales (+2.3%) advanced more than the category (1.9%), exceeded the growth for pork (+0.9%) and matched chicken dollar growth. For the most recent 13 and 52 week periods, beef dollar sales are up from the same periods a year ago by 2.5% and 4.3% respectively.
2. Pound sales for beef (+5.0%) kept pace with the category (+5.1%) but advanced less than chicken (+6.2%) and pork (+5.4%) on a percentage growth basis. For both the most recent 13 and 52 week periods, beef pound sales have increased by 3.0% versus same year ago periods.
3. The average per pound price for beef fell (-2.6%); however, the decline was a smaller percentage than either chicken (-3.7%) or pork (-4.2%) experienced. The average price per pound for the 5, 13 and 52 week periods was \$3.62, \$3.63 and \$3.70 respectively.
4. Total ad count in June advanced for the category (+7.0%). While beef increased (+4.2%), it did not keep pace with chicken (+12.4%) or pork (+10.8%). For the most recent 13 and 52 week periods, beef's feature activity has increased by 2.3% and 2.8% respectively.
5. A ad activity for the total category was off (-1.0%). While beef declined (-4.8%) and pork fell (-1.3%), chicken advanced (+9.6%). However beef's share of A features (51.0%) remains double the share that chicken has recently attained.

# Total US – Fresh Meat Sales

June 2009

**Dollars - Total**

| Class             | 5 WEEKS                |               | 13 WEEKS               |               | 52 WEEKS                |               |
|-------------------|------------------------|---------------|------------------------|---------------|-------------------------|---------------|
|                   | 05/25/09-06/28/09      | % Change      | WE 06/28/09            | % Change      | WE 06/28/09             | % Change      |
| <b>TOTAL MEAT</b> | <b>\$2,828,381,254</b> | <b>+ 1.9%</b> | <b>\$7,585,199,640</b> | <b>+ 4.7%</b> | <b>\$30,319,562,710</b> | <b>+ 4.9%</b> |
| Beef              | \$1,554,078,817        | + 2.3%        | \$4,035,551,665        | + 2.5%        | \$15,859,639,583        | + 4.3%        |
| Chicken           | \$643,642,820          | + 2.3%        | \$1,675,993,986        | + 2.2%        | \$6,617,177,184         | + 6.5%        |
| Pork              | \$521,764,884          | + 0.9%        | \$1,523,428,325        | + 11.7%       | \$5,971,912,417         | + 5.3%        |
| Turkey            | \$65,232,489           | + 1.3%        | \$211,190,698          | + 19.0%       | \$1,338,954,604         | + 3.1%        |
| Lamb              | \$22,279,498           | - 3.2%        | \$80,298,366           | + 23.6%       | \$268,891,558           | - 1.9%        |
| Veal              | \$7,332,070            | 0.0%          | \$20,181,559           | - 3.3%        | \$88,954,919            | - 6.9%        |
| Other*            | \$14,050,675           | - 0.4%        | \$38,555,041           | + 1.6%        | \$174,032,446           | + 10.0%       |

**Pounds - Total**

| Class             | 5 WEEKS            |               | 13 WEEKS             |               | 52 WEEKS              |               |
|-------------------|--------------------|---------------|----------------------|---------------|-----------------------|---------------|
|                   | 05/25/09-06/28/09  | % Change      | WE 06/28/09          | % Change      | WE 06/28/09           | % Change      |
| <b>TOTAL MEAT</b> | <b>998,893,308</b> | <b>+ 5.1%</b> | <b>2,725,841,364</b> | <b>+ 7.5%</b> | <b>10,965,551,524</b> | <b>+ 4.4%</b> |
| Beef              | 429,207,575        | + 5.0%        | 1,111,861,611        | + 3.0%        | 4,287,140,623         | + 3.0%        |
| Chicken           | 325,435,505        | + 6.2%        | 837,327,507          | + 3.1%        | 3,264,541,723         | + 7.3%        |
| Pork              | 207,380,197        | + 5.4%        | 645,471,040          | + 20.4%       | 2,416,365,984         | + 6.1%        |
| Turkey            | 26,126,111         | - 2.6%        | 96,564,166           | + 27.1%       | 864,531,443           | - 2.6%        |
| Lamb              | 3,891,290          | - 7.1%        | 15,354,228           | + 24.4%       | 48,368,824            | - 8.7%        |
| Veal              | 1,059,980          | + 2.4%        | 2,933,370            | - 0.5%        | 12,729,881            | - 14.3%       |
| Other*            | 5,792,649          | - 2.4%        | 16,329,441           | + 1.8%        | 71,873,046            | + 8.6%        |

**Average Price/LB**

| Class             | 5 WEEKS           |               | 13 WEEKS      |               | 52 WEEKS      |               |
|-------------------|-------------------|---------------|---------------|---------------|---------------|---------------|
|                   | 05/25/09-06/28/09 | % Change      | WE 06/28/09   | % Change      | WE 06/28/09   | % Change      |
| <b>TOTAL MEAT</b> | <b>\$2.83</b>     | <b>- 3.0%</b> | <b>\$2.78</b> | <b>- 2.6%</b> | <b>\$2.76</b> | <b>+ 0.5%</b> |
| Beef              | \$3.62            | - 2.6%        | \$3.63        | - 0.5%        | \$3.70        | + 1.3%        |
| Chicken           | \$1.98            | - 3.7%        | \$2.00        | - 0.8%        | \$2.03        | - 0.7%        |
| Pork              | \$2.52            | - 4.2%        | \$2.36        | - 7.2%        | \$2.47        | - 0.7%        |
| Turkey            | \$2.50            | + 4.1%        | \$2.19        | - 6.4%        | \$1.55        | + 5.9%        |
| Lamb              | \$5.73            | + 4.2%        | \$5.23        | - 0.7%        | \$5.56        | + 7.5%        |
| Veal              | \$6.92            | - 2.3%        | \$6.88        | - 2.9%        | \$6.99        | + 8.7%        |
| Other*            | \$2.43            | + 2.1%        | \$2.36        | - 0.1%        | \$2.42        | + 1.3%        |

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

Sourced from FreshLook Data – Five Weeks Ending 06/28/09



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**Total US - Feature Ad Top Line**  
**June 2009**

| <b>Ad Count - Total</b> |                            |              |                     |              |                     |              |
|-------------------------|----------------------------|--------------|---------------------|--------------|---------------------|--------------|
| <b>CLASS</b>            | <b>5 WEEKS</b>             |              | <b>13 WEEKS</b>     |              | <b>52 WEEKS</b>     |              |
|                         | <b>(5/24/09 - 6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> |
| <b>TOTAL MEAT</b>       | <b>27268</b>               | <b>7.0%</b>  | <b>72593</b>        | <b>6.7%</b>  | <b>282963</b>       | <b>1.6%</b>  |
| Beef                    | 12373                      | 4.2%         | 31535               | 2.3%         | 121608              | 2.8%         |
| Chicken                 | 6641                       | 12.4%        | 16240               | 2.1%         | 61867               | 2.8%         |
| Pork                    | 5623                       | 10.8%        | 14343               | 1.7%         | 55568               | 0.5%         |
| Turkey                  | 1133                       | 4.6%         | 3732                | 28.7%        | 17668               | 2.2%         |
| Ham                     | 858                        | -7.0%        | 4469                | 85.1%        | 17999               | -8.4%        |
| Lamb                    | 358                        | -20.6%       | 1512                | 6.7%         | 5648                | -6.7%        |
| Veal                    | 282                        | 72.0%        | 762                 | 68.2%        | 2605                | 54.0%        |

| <b>Ad Count - "A"</b> |                            |              |                     |              |                     |              |
|-----------------------|----------------------------|--------------|---------------------|--------------|---------------------|--------------|
| <b>Class</b>          | <b>5 WEEKS</b>             |              | <b>13 WEEKS</b>     |              | <b>52 WEEKS</b>     |              |
|                       | <b>(5/24/09 - 6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> |
| <b>TOTAL MEAT</b>     | <b>11690</b>               | <b>-1.0%</b> | <b>33205</b>        | <b>3.7%</b>  | <b>132182</b>       | <b>-0.4%</b> |
| Beef                  | 5965                       | -4.8%        | 15951               | -4.8%        | 62560               | 0.0%         |
| Chicken               | 2993                       | 9.6%         | 7355                | 1.2%         | 28492               | 2.1%         |
| Pork                  | 2250                       | -1.3%        | 6213                | -4.8%        | 24732               | -1.6%        |
| Turkey                | 282                        | 34.3%        | 1189                | 115.8%       | 7268                | 5.1%         |
| Ham                   | 153                        | -21.9%       | 2115                | 268.5%       | 7956                | -7.2%        |
| Lamb                  | 25                         | -76.0%       | 322                 | 10.3%        | 935                 | -31.9%       |
| Veal                  | 22                         | -8.3%        | 60                  | 9.1%         | 239                 | 23.2%        |

| <b>Ad Share - Total</b> |                            |                |                     |                |                     |                |
|-------------------------|----------------------------|----------------|---------------------|----------------|---------------------|----------------|
| <b>Class</b>            | <b>5 WEEKS</b>             |                | <b>13 WEEKS</b>     |                | <b>52 WEEKS</b>     |                |
|                         | <b>(5/24/09 - 6/27/09)</b> | <b>Pt Chg</b>  | <b>WE (6/27/09)</b> | <b>Pt Chg</b>  | <b>WE (6/27/09)</b> | <b>Pt Chg</b>  |
| <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                    | 45.38%                     | -1.2 Pts       | 43.44%              | -1.9 Pts       | 42.98%              | 0.5 Pts        |
| Chicken                 | 24.35%                     | 1.2 Pts        | 22.37%              | -1.0 Pts       | 21.86%              | 0.3 Pts        |
| Pork                    | 20.62%                     | 0.7 Pts        | 19.76%              | -1.0 Pts       | 19.64%              | -0.2 Pts       |
| Turkey                  | 4.16%                      | -0.1 Pts       | 5.14%               | 0.9 Pts        | 6.24%               | 0.0 Pts        |
| Ham                     | 3.15%                      | -0.5 Pts       | 6.16%               | 2.6 Pts        | 6.36%               | -0.7 Pts       |
| Lamb                    | 1.31%                      | -0.5 Pts       | 2.08%               | 0.0 Pts        | 2.0%                | -0.2 Pts       |
| Veal                    | 1.03%                      | 0.4 Pts        | 1.05%               | 0.4 Pts        | 0.92%               | 0.3 Pts        |

| <b>Category Average Advertised Price/LB - Total ( 2 Yrs )</b> |                            |              |                     |              |                     |              |
|---|----------------------------|--------------|---------------------|--------------|---------------------|--------------|
| <b>Class</b>  | <b>5 WEEKS</b>             |              | <b>13 WEEKS</b>     |              | <b>52 WEEKS</b>     |              |
|   | <b>(5/24/09 - 6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> | <b>WE (6/27/09)</b> | <b>% Chg</b> |
| <b>TOTAL MEAT</b>   | <b>\$3.37</b>              | <b>-4.9%</b> | <b>\$3.39</b>       | <b>-2.8%</b> | <b>\$3.51</b>       | <b>3.8%</b>  |
| Beef  | \$4.29                     | -4.3%        | \$4.41              | -1.0%        | \$4.61              | 3.7%         |
| Chicken   | \$2.17                     | 0.3%         | \$2.14              | -0.1%        | \$2.16              | 3.7%         |
| Pork  | \$2.59                     | -7.5%        | \$2.62              | -3.2%        | \$2.74              | 3.0%         |
| Turkey  | \$2.84                     | 4.4%         | \$2.47              | -10.0%       | \$2.35              | 3.5%         |
| Ham   | \$2.66                     | -11.7%       | \$2.43              | -12.5%       | \$2.67              | 3.9%         |
| Lamb  | \$6.22                     | 1.5%         | \$5.82              | -2.1%        | \$5.99              | 6.0%         |
| Veal  | \$6.18                     | -8.1%        | \$6.46              | -14.3%       | \$6.78              | -6.1%        |

\*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"



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