

FreshLook and Promodata March 2010 Highlights

1. March dollar sales for beef (-3.6%) were down versus the prior year. Chicken (-2.0%) and Pork (-0.4%) dollar sales also declined. Beef's decline in dollar sales is slightly more than the decline in total meat category sales (-2.6%) 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 versus year ago were slightly lower (-1.1%) than the decline in the total meat category (-0.4%) while chicken pound sales slightly increased (+0.3%) along with pork pounds (+1.3%). Beef's pound sales have grown strongly versus year ago periods, registering a 1.6% increase for the quarter and a 5.6% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-2.6%) to \$3.39/lb. This decrease is greater than the decline for chicken (-2.3%) and the pork decline (-1.7%). 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 in March for beef (+0.3%) which is greater than activity for chicken (-2.0%) but less than pork total ads (+1.3%). Beef has gained ad share for the latest 13 week period (+1.3%) and maintains 43.29% to 45.44% of all meat ads.
5. "A" ad activity for total meat decreased (-3.1%) for March. Beef "A" ads declined (-1.4%) compared to a significant decline in chicken (-11.4%) and a smaller decline in pork (-2.4%). Despite the decline, beef still represents the largest share (49.94%) of all "A" ad activity.

Total US – Fresh Meat Sales

March 2010

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	02/22/10-03/28/10	% Change	WE 03/28/10	% Change	WE 03/28/10	% Change
TOTAL MEAT	\$2,737,100,582	- 2.6%	\$7,368,760,384	- 2.4%	\$30,215,805,315	+ 0.8%
Beef	\$1,473,273,446	- 3.6%	\$3,924,794,635	- 3.1%	\$15,784,678,911	+ 0.1%
Chicken	\$625,995,567	- 2.0%	\$1,695,590,623	- 1.7%	\$6,634,356,877	+ 0.8%
Pork	\$507,284,599	- 0.4%	\$1,395,448,631	- 1.6%	\$5,947,689,241	+ 2.3%
Turkey	\$78,123,357	- 6.7%	\$211,978,639	- 5.0%	\$1,307,061,194	+ 0.1%
Lamb	\$26,298,939	+ 9.7%	\$68,089,034	+ 5.3%	\$275,637,611	+ 8.7%
Veal	\$8,991,386	- 7.1%	\$24,606,671	- 2.8%	\$86,967,144	- 3.0%
Other*	\$17,133,288	+ 10.6%	\$48,252,152	+ 10.8%	\$179,414,336	+ 3.5%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	02/22/10-03/28/10	% Change	WE 03/28/10	% Change	WE 03/28/10	% Change
TOTAL MEAT	1,010,400,245	- 0.4%	2,733,801,532	+ 1.3%	11,455,419,843	+ 6.3%
Beef	434,309,427	- 1.1%	1,148,469,888	+ 1.6%	4,493,050,354	+ 5.6%
Chicken	319,880,204	+ 0.3%	872,728,412	+ 1.3%	3,393,480,241	+ 4.8%
Pork	209,824,663	+ 1.3%	584,683,067	+ 2.0%	2,561,290,464	+ 11.0%
Turkey	33,892,038	- 10.1%	93,738,663	- 6.4%	872,637,534	+ 3.4%
Lamb	4,682,461	+ 10.1%	12,391,543	+ 8.4%	50,612,580	+ 11.6%
Veal	1,337,082	- 3.0%	3,647,937	+ 1.0%	12,828,446	+ 0.7%
Other*	6,474,368	+ 0.6%	18,142,023	+ 3.2%	71,520,224	- 0.1%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	02/22/10-03/28/10	% Change	WE 03/28/10	% Change	WE 03/28/10	% Change
TOTAL MEAT	\$2.71	- 2.1%	\$2.70	- 3.7%	\$2.64	- 5.2%
Beef	\$3.39	- 2.6%	\$3.42	- 4.6%	\$3.51	- 5.2%
Chicken	\$1.96	- 2.3%	\$1.94	- 2.9%	\$1.96	- 3.8%
Pork	\$2.42	- 1.7%	\$2.39	- 3.5%	\$2.32	- 7.8%
Turkey	\$2.31	+ 3.8%	\$2.26	+ 1.6%	\$1.50	- 3.2%
Lamb	\$5.62	- 0.3%	\$5.49	- 2.8%	\$5.45	- 2.6%
Veal	\$6.72	- 4.1%	\$6.75	- 3.7%	\$6.78	- 3.6%
Other*	\$2.65	+ 10.0%	\$2.66	+ 7.3%	\$2.51	+ 3.6%

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



Sourced from FreshLook Data – Five Weeks Ending 03/28/10

Funded by The Beef Checkoff

Total US - Feature Ad Top Line
March 2010

Ad Count - Total						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(2/21/10 - 3/27/10)	% Chg	WE (3/27/10)	% Chg	WE (3/27/10)	% Chg
TOTAL MEAT	27233	0.9%	69746	0.0%	294332	5.4%
Beef	12082	0.3%	31695	2.9%	127416	5.5%
Chicken	6059	-2.0%	16223	-1.3%	64296	3.2%
Pork	6599	1.3%	16411	-4.1%	75426	6.1%
Turkey	1602	10.9%	3268	-3.4%	17962	5.6%
Lamb	654	26.7%	1437	10.2%	6231	10.9%
Veal	237	-20.7%	712	-1.8%	3001	29.6%

Ad Count - "A"						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(2/21/10 - 3/27/10)	% Chg	WE (3/27/10)	% Chg	WE (3/27/10)	% Chg
TOTAL MEAT	12326	-3.1%	31115	-4.9%	133603	2.0%
Beef	6156	-1.4%	15682	-2.7%	63158	0.0%
Chicken	2699	-11.4%	7426	-7.5%	29172	1.3%
Pork	2790	-2.4%	6791	-7.6%	32496	4.2%
Turkey	572	18.9%	1015	5.1%	7533	11.7%
Lamb	96	62.7%	170	-11.5%	1027	11.6%
Veal	13	-55.2%	31	-55.7%	217	-7.3%

Ad Share - Total						
	5 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(2/21/10 - 3/27/10)	Pt Chg	WE (3/27/10)	Pt Chg	WE (3/27/10)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	44.37%	-0.2 Pts	45.44%	1.3 Pts	43.29%	0.0 Pts
Chicken	22.25%	-0.7 Pts	23.26%	-0.3 Pts	21.84%	-0.5 Pts
Pork	24.23%	0.1 Pts	23.53%	-1.0 Pts	25.63%	0.2 Pts
Turkey	5.88%	0.5 Pts	4.69%	-0.2 Pts	6.1%	0.0 Pts
Lamb	2.4%	0.5 Pts	2.06%	0.2 Pts	2.12%	0.1 Pts
Veal	0.87%	-0.2 Pts	1.02%	0.0 Pts	1.02%	0.2 Pts

Category Average Advertised Price/Lb - Total (2 Yrs)¹						
	5 WEEKS		13 WEEKS		52 WEEKS	
Class	(2/21/10 - 3/27/10)	% Chg	WE (3/27/10)	% Chg	WE (3/27/10)	% Chg
TOTAL MEAT	\$3.30	-2.1%	\$3.33	-3.3%	\$3.35	-5.2%
Beef	\$4.13	-3.5%	\$4.21	-4.9%	\$4.36	-5.6%
Chicken	\$2.11	0.2%	\$2.10	-2.6%	\$2.13	-2.1%
Pork	\$2.55	-3.3%	\$2.52	-5.2%	\$2.52	-8.7%
Turkey	\$2.43	-8.1%	\$2.59	-2.6%	\$2.28	-4.5%
Lamb	\$6.06	1.1%	\$6.06	1.7%	\$5.92	-1.8%
Veal	\$7.35	10.8%	\$6.87	2.8%	\$6.61	-6.2%

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"

