

FreshLook and Promodata September '09 Highlights

1. September dollar sales for beef (+2.8%) advanced versus the prior year at a considerably stronger pace than either chicken (+.5%) or pork (+.9%). Beef's growth in dollar sales has exceeded the growth the total category has achieved in the latest month, quarter and 52 week period resulting in share growth for beef in a category that is showing consistent growth.
2. Pound sales for beef (+13.7%) exceeded the growth for the total category (+13.4%) and chicken (11.0%) but was below pork's growth (+16.0%). Beef's pound sales have grown strongly versus the year ago periods, registering at 11.7% jump for the quarter and a 6.1% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-9.6%) to \$3.49 per pound. This decrease is consistent with the percentage decline for chicken (-9.5%) but less than the pork decline (-13.0%). The average per pound for beef is now running below the like period from the prior year for the latest 5, 13 and 52 week periods.
4. Retail feature activity increased in September for beef (+3.2%) which matched pork (+3.2%) but was below the increase for chicken (+6.1%). With the increased level of feature activity, beef has managed to maintain a 43% to 46% of all meat ads for all three reporting periods.
5. A ad activity for total meat (-2.2%) has not kept up to the growth in total ads and this is also true for beef (-4.5%) and pork (-3.0%) but not chicken (+2.9%). Even though beef did experience a decline in share of A ads, it still had a 50.2% share of the A ads.

Total US – Fresh Meat Sales

September 2009

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/24/09-09/27/09	% Change	WE 09/27/09	% Change	WE 09/27/09	% Change
TOTAL MEAT	\$2,901,669,640	+ 2.0%	\$7,483,775,514	+ 3.0%	\$30,537,292,752	+ 4.8%
Beef	\$1,571,889,664	+ 2.8%	\$4,057,678,087	+ 3.3%	\$15,987,957,789	+ 4.9%
Chicken	\$661,191,706	+ 0.5%	\$1,717,315,098	+ 2.7%	\$6,662,653,160	+ 5.3%
Pork	\$539,742,649	+ 0.9%	\$1,402,098,127	+ 2.6%	\$6,006,802,645	+ 4.8%
Turkey	\$84,480,524	+ 8.1%	\$194,627,903	+ 7.2%	\$1,352,011,757	+ 3.2%
Lamb	\$22,316,552	+ 0.5%	\$56,671,492	- 2.2%	\$267,634,119	- 1.4%
Veal	\$7,673,904	- 8.5%	\$18,676,131	- 7.6%	\$87,408,651	- 6.0%
Other*	\$14,374,641	- 3.2%	\$36,708,675	- 3.2%	\$172,824,631	+ 5.7%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/24/09-09/27/09	% Change	WE 09/27/09	% Change	WE 09/27/09	% Change
TOTAL MEAT	1,079,251,836	+ 13.4%	2,728,245,883	+ 12.1%	11,259,166,926	+ 6.6%
Beef	450,633,973	+ 13.7%	1,143,980,067	+ 11.7%	4,406,784,068	+ 6.1%
Chicken	349,283,612	+ 11.0%	889,617,297	+ 10.9%	3,351,948,315	+ 8.4%
Pork	227,670,668	+ 16.0%	578,995,718	+ 15.0%	2,491,777,873	+ 8.5%
Turkey	40,625,826	+ 21.3%	87,347,124	+ 15.9%	876,511,529	- 1.1%
Lamb	3,906,917	+ 4.1%	9,786,282	- 3.0%	48,070,466	- 7.2%
Veal	1,116,730	- 6.0%	2,724,171	- 5.8%	12,563,117	- 11.6%
Other*	6,014,111	- 4.2%	15,795,223	- 2.2%	71,511,558	+ 4.6%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	08/24/09-09/27/09	% Change	WE 09/27/09	% Change	WE 09/27/09	% Change
TOTAL MEAT	\$2.69	- 10.1%	\$2.74	- 8.1%	\$2.71	- 1.7%
Beef	\$3.49	- 9.6%	\$3.55	- 7.5%	\$3.63	- 1.1%
Chicken	\$1.89	- 9.5%	\$1.93	- 7.4%	\$1.99	- 2.9%
Pork	\$2.37	- 13.0%	\$2.42	- 10.8%	\$2.41	- 3.4%
Turkey	\$2.08	- 10.9%	\$2.23	- 7.5%	\$1.54	+ 4.4%
Lamb	\$5.71	- 3.4%	\$5.79	+ 0.8%	\$5.57	+ 6.3%
Veal	\$6.87	- 2.6%	\$6.86	- 2.0%	\$6.96	+ 6.3%
Other*	\$2.39	+ 1.0%	\$2.32	- 1.0%	\$2.42	+ 1.0%

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

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



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
September 2009

Ad Count - Total						
CLASS	5 WEEKS		13 WEEKS		52 WEEKS	
	(8/23/09 - 9/26/09)	% Chg	WE (9/26/09)	% Chg	WE (9/26/09)	% Chg
TOTAL MEAT	27539	4.4%	70970	5.2%	286499	2.4%
Beef	12556	3.2%	32528	3.6%	122756	2.5%
Chicken	6408	6.1%	16639	6.0%	62821	3.6%
Pork	5628	3.2%	14572	6.5%	56466	2.7%
Turkey	1240	2.7%	3173	7.6%	17893	2.9%
Ham	1005	13.3%	2281	7.8%	18168	-6.5%
Lamb	447	0.2%	1109	-4.6%	5596	-6.4%
Veal	255	42.5%	668	40.9%	2799	64.8%

Ad Count - "A"						
Class	5 WEEKS		13 WEEKS		52 WEEKS	
	(8/23/09 - 9/26/09)	% Chg	WE (9/26/09)	% Chg	WE (9/26/09)	% Chg
TOTAL MEAT	11987	-2.2%	31312	0.4%	132318	-0.5%
Beef	6014	-4.5%	15983	-0.8%	62446	-1.4%
Chicken	2942	2.9%	7582	2.8%	28702	3.4%
Pork	2444	-3.0%	6319	-2.5%	24573	-1.9%
Turkey	321	-12.8%	825	21.3%	7413	6.6%
Ham	203	25.3%	435	12.1%	8005	-4.8%
Lamb	35	0.0%	121	-1.6%	933	-26.8%
Veal	28	86.7%	47	17.5%	246	73.2%

Ad Share - Total						
Class	5 WEEKS		13 WEEKS		52 WEEKS	
	(8/23/09 - 9/26/09)	Pt Chg	WE (9/26/09)	Pt Chg	WE (9/26/09)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	45.59%	-0.5 Pts	45.83%	-0.7 Pts	42.85%	0.0 Pts
Chicken	23.27%	0.4 Pts	23.45%	0.2 Pts	21.93%	0.3 Pts
Pork	20.44%	-0.2 Pts	20.53%	0.2 Pts	19.71%	0.1 Pts
Turkey	4.5%	-0.1 Pts	4.47%	0.1 Pts	6.25%	0.0 Pts
Ham	3.65%	0.3 Pts	3.21%	0.1 Pts	6.34%	-0.6 Pts
Lamb	1.62%	-0.1 Pts	1.56%	-0.2 Pts	1.95%	-0.2 Pts
Veal	0.93%	0.2 Pts	0.94%	0.2 Pts	0.98%	0.4 Pts

Category Average Advertised Price/LB - Total (2 Yrs)¹						
Class	5 WEEKS		13 WEEKS		52 WEEKS	
	(8/23/09 - 9/26/09)	% Chg	WE (9/26/09)	% Chg	WE (9/26/09)	% Chg
TOTAL MEAT	\$3.35	-9.7%	\$3.37	-7.8%	\$3.44	0.0%
Beef	\$4.29	-10.1%	\$4.29	-8.5%	\$4.50	-0.6%
Chicken	\$2.12	-3.9%	\$2.13	-2.2%	\$2.15	2.0%
Pork	\$2.57	-11.4%	\$2.58	-10.2%	\$2.66	-0.9%
Turkey	\$2.52	-7.3%	\$2.73	-1.6%	\$2.35	2.4%
Ham	\$2.68	-15.8%	\$2.68	-13.8%	\$2.62	0.9%
Lamb	\$5.87	-8.4%	\$5.91	-1.9%	\$5.97	4.3%
Veal	\$6.58	-4.6%	\$6.40	-3.1%	\$6.71	-6.3%

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", "Meats and Entrees", "Prepared Meat", and "Sausage, Breakfast"

