

FreshLook and Promodata April 2010 Highlights

1. April dollar sales for beef (+0.1) were slightly higher versus the prior year. Chicken (+1.3%) also saw an increase while Pork (-7.0%) dollar sales declined. Beef's increase in dollar sales compares to a decrease in total meat category sales (-1.9%) 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 higher (-2.3%) than the decline in the total meat category (-4.5%) while chicken pound sales slightly increased (+2.0%) and pork pounds significantly declined (-10.9%). Beef's pound sales have grown strongly versus year ago periods, registering a 5.4% increase for the latest 52 weeks.
3. The average price per pound for beef increased (+2.4%) to \$3.70/lb. This is greater than chicken, which declined (-0.7%) but less than the pork increase (+4.4%). The average price per pound for beef is running below the like period from the prior year for the latest 13- and 52-week periods.
4. Retail feature activity increased in April for beef (+2.8%) which is greater than activity for chicken (-2.0%) and pork total ads (-17.9%). Beef has gained ad share for the latest 4-, 13- and 52 week periods and maintains 42.14% to 44.49% of all meat ads.
5. "A" ad activity for total meat decreased (-15.7%) for April. Beef "A" ads declined (-7.4%) compared to a decline in chicken (-1.4%) and a significant decline in pork (-28.5%). Despite the decline, beef still represents the largest share (44.52%) of all "A" ad activity.

Total US – Fresh Meat Sales

April 2010

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/29/10-04/25/10	% Change	WE 04/25/10	% Change	WE 04/25/10	% Change
TOTAL MEAT	\$2,324,193,489	- 1.9%	\$7,359,971,338	- 2.3%	\$30,170,695,759	- 0.1%
Beef	\$1,175,545,787	+ 0.1%	\$3,882,840,385	- 2.1%	\$15,786,003,324	0.0%
Chicken	\$501,335,276	+ 1.3%	\$1,654,314,469	- 0.7%	\$6,640,903,803	+ 0.9%
Pork	\$517,824,308	- 7.0%	\$1,454,626,336	- 4.0%	\$5,908,771,874	- 0.9%
Turkey	\$73,856,699	- 13.6%	\$216,539,356	- 9.0%	\$1,295,478,114	- 2.8%
Lamb	\$35,452,951	- 7.5%	\$81,839,288	- 0.3%	\$272,750,290	+ 1.2%
Veal	\$6,503,822	- 2.1%	\$23,228,454	- 4.2%	\$86,830,913	- 2.8%
Other*	\$13,674,646	+ 4.1%	\$46,583,050	+ 9.8%	\$179,957,440	+ 3.3%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/29/10-04/25/10	% Change	WE 04/25/10	% Change	WE 04/25/10	% Change
TOTAL MEAT	848,841,068	- 4.5%	2,699,247,757	- 1.3%	11,415,537,106	+ 4.8%
Beef	317,535,839	- 2.3%	1,105,477,105	- 0.1%	4,485,680,535	+ 5.4%
Chicken	248,043,072	+ 2.0%	839,414,696	+ 1.2%	3,398,328,940	+ 5.0%
Pork	233,500,473	- 10.9%	620,032,691	- 4.7%	2,532,590,100	+ 5.3%
Turkey	36,548,355	- 16.5%	98,089,504	- 12.6%	865,411,509	+ 0.3%
Lamb	6,939,149	- 13.6%	15,284,343	- 3.0%	49,520,442	+ 1.4%
Veal	951,464	- 1.8%	3,427,741	- 1.6%	12,810,721	+ 0.7%
Other*	5,322,716	- 5.8%	17,521,678	+ 0.7%	71,194,860	- 1.3%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	03/29/10-04/25/10	% Change	WE 04/25/10	% Change	WE 04/25/10	% Change
TOTAL MEAT	\$2.74	+ 2.7%	\$2.73	- 1.0%	\$2.64	- 4.6%
Beef	\$3.70	+ 2.4%	\$3.51	- 2.0%	\$3.52	- 5.1%
Chicken	\$2.02	- 0.7%	\$1.97	- 1.8%	\$1.95	- 3.9%
Pork	\$2.22	+ 4.4%	\$2.35	+ 0.7%	\$2.33	- 5.9%
Turkey	\$2.02	+ 3.5%	\$2.21	+ 4.2%	\$1.50	- 3.1%
Lamb	\$5.11	+ 7.0%	\$5.35	+ 2.8%	\$5.51	- 0.1%
Veal	\$6.84	- 0.2%	\$6.78	- 2.6%	\$6.78	- 3.4%
Other*	\$2.57	+ 10.5%	\$2.66	+ 9.1%	\$2.53	+ 4.6%

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



Sourced from FreshLook Data – Four Weeks Ending 04/25/10

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Total US - Feature Ad Top Line

April 2010

Ad Count - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(3/28/10 - 4/24/10)	% Chg	WE (4/24/10)	% Chg	WE (4/24/10)	% Chg
TOTAL MEAT	22083	-5.9%	70560	-1.9%	293121	4.1%
Beef	9306	2.8%	31390	2.4%	127745	5.8%
Chicken	4690	-2.0%	15679	-1.2%	64235	3.8%
Pork	5788	-17.9%	17200	-9.1%	74199	1.5%
Turkey	1341	-16.9%	3792	-5.6%	17706	0.4%
Lamb	715	-5.0%	1776	4.1%	6201	6.6%
Veal	243	14.1%	723	0.1%	3035	27.4%

Ad Count - "A"						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(3/28/10 - 4/24/10)	% Chg	WE (4/24/10)	% Chg	WE (4/24/10)	% Chg
TOTAL MEAT	9406	-15.7%	30995	-9.0%	131905	-0.1%
Beef	4188	-7.4%	15198	-4.7%	62845	0.5%
Chicken	2043	-1.4%	7002	-6.1%	29153	2.7%
Pork	2583	-28.5%	7289	-17.0%	31479	-3.1%
Turkey	461	-31.7%	1236	-12.3%	7324	1.2%
Lamb	125	-50.6%	247	-39.2%	901	-13.4%
Veal	6	-70.0%	23	-66.7%	203	-18.8%

Ad Share - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(3/28/10 - 4/24/10)	Pt Chg	WE (4/24/10)	Pt Chg	WE (4/24/10)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	42.14%	3.6 Pts	44.49%	1.8 Pts	43.58%	0.7 Pts
Chicken	21.24%	0.8 Pts	22.22%	0.1 Pts	21.91%	-0.1 Pts
Pork	26.21%	-3.8 Pts	24.38%	-1.9 Pts	25.31%	-0.6 Pts
Turkey	6.07%	-0.8 Pts	5.37%	-0.2 Pts	6.04%	-0.2 Pts
Lamb	3.24%	0.0 Pts	2.52%	0.1 Pts	2.12%	0.0 Pts
Veal	1.1%	0.2 Pts	1.02%	0.0 Pts	1.04%	0.2 Pts

Category Average Advertised Price/Lb - Total (2 Yrs)¹						
	4 WEEKS		13 WEEKS		52 WEEKS	
Class	(3/28/10 - 4/24/10)	% Chg	WE (4/24/10)	% Chg	WE (4/24/10)	% Chg
TOTAL MEAT	\$3.38	1.2%	\$3.35	-1.7%	\$3.35	-5.0%
Beef	\$4.41	-2.6%	\$4.26	-4.6%	\$4.35	-6.1%
Chicken	\$2.07	-4.3%	\$2.09	-2.3%	\$2.12	-2.4%
Pork	\$2.54	1.9%	\$2.54	-1.3%	\$2.53	-8.0%
Turkey	\$2.34	10.2%	\$2.46	1.5%	\$2.30	-1.7%
Lamb	\$5.97	8.0%	\$6.15	6.2%	\$5.98	-0.6%
Veal	\$6.66	-8.8%	\$6.99	1.1%	\$6.56	-5.7%

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"



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