

## **FreshLook and Promodata April 2011 Highlights**

1. April dollar sales for beef (+4.7%) increased versus the prior year. Chicken (+3.1%) and pork (+12.5%) also increased in dollar sales. Beef's rise in dollar sales is consistent with the increase in total meat category sales (+6.4%) for the latest month. Beef's percent change has been consistent to the total meat category changes for the latest 4-, 13- and 52-week periods.
2. Pound sales for beef versus a year ago were down (-7.5%) compared to a decline in the total meat category (-2.0%). Pork pound sales (+3.1%) increased and chicken pounds (+0.2%) slightly increased for April.
3. The average price per pound for beef increased versus a year ago (+13.1%) to \$4.14/lb. The rise in beef compares to increases for pork (+9.1%) and chicken (+3.0%). The average price per pound for beef is running greater (+8.2%) than the like period from the prior year for the latest 52-week period.
4. Retail feature activity decreased in April for beef (-21.0%) which is compared to a decrease for chicken (-2.6%) and an increase in pork ad activity (+12.9%). Beef maintains 42.22% of all meat ads for the latest 52-week period.
5. "A" ad activity for total meat decreased (-7.3%) for April. Beef "A" ads declined (-23.2%) compared to a decrease in chicken (-5.6%) and an increase in pork (+11.7%). Despite the decline, beef still represents the largest share (36.91%) of all "A" ad activity.

# Total US – Fresh Meat Sales

April 2011

**Dollars - Total**

| Class             | 4 WEEKS                |               | 13 WEEKS               |               | 52 WEEKS                |               |
|-------------------|------------------------|---------------|------------------------|---------------|-------------------------|---------------|
|                   | 03/28/11-04/24/11      | % Change      | WE 04/24/11            | % Change      | WE 04/24/11             | % Change      |
| <b>TOTAL MEAT</b> | <b>\$2,650,211,395</b> | <b>+ 6.4%</b> | <b>\$8,212,337,229</b> | <b>+ 4.8%</b> | <b>\$33,092,474,303</b> | <b>+ 3.1%</b> |
| Beef              | \$1,282,364,658        | + 4.7%        | \$4,213,276,087        | + 5.0%        | \$16,815,908,211        | + 3.1%        |
| Chicken           | \$579,377,016          | + 3.1%        | \$1,904,969,926        | + 3.6%        | \$7,557,248,693         | + 2.5%        |
| Pork              | \$604,082,352          | + 12.5%       | \$1,591,156,579        | + 6.2%        | \$6,324,625,986         | + 3.7%        |
| Turkey            | \$118,533,603          | + 12.1%       | \$334,325,672          | + 4.8%        | \$1,782,594,871         | + 3.3%        |
| Lamb              | \$37,661,625           | + 3.5%        | \$82,072,213           | - 2.0%        | \$280,339,880           | + 0.7%        |
| Veal              | \$7,217,356            | + 6.0%        | \$24,299,210           | + 0.9%        | \$88,802,232            | - 1.5%        |
| Other*            | \$20,974,786           | + 25.8%       | \$62,237,541           | + 12.3%       | \$242,954,430           | + 10.0%       |

## Pounds - Total

| Class             | 4 WEEKS            |               | 13 WEEKS             |               | 52 WEEKS              |               |
|-------------------|--------------------|---------------|----------------------|---------------|-----------------------|---------------|
|                   | 03/28/11-04/24/11  | % Change      | WE 04/24/11          | % Change      | WE 04/24/11           | % Change      |
| <b>TOTAL MEAT</b> | <b>902,830,109</b> | <b>- 2.0%</b> | <b>2,787,542,065</b> | <b>- 4.1%</b> | <b>11,887,342,306</b> | <b>- 3.6%</b> |
| Beef              | 309,728,192        | - 7.5%        | 1,076,701,689        | - 6.8%        | 4,468,854,701         | - 4.7%        |
| Chicken           | 276,851,934        | + 0.2%        | 928,683,317          | + 0.2%        | 3,714,314,343         | - 0.8%        |
| Pork              | 253,455,044        | + 3.1%        | 616,667,887          | - 4.8%        | 2,483,950,468         | - 6.4%        |
| Turkey            | 49,766,113         | + 1.6%        | 128,936,119          | - 4.9%        | 1,070,669,961         | - 2.6%        |
| Lamb              | 5,802,988          | - 20.1%       | 12,678,621           | - 19.9%       | 44,389,152            | - 13.1%       |
| Veal              | 1,091,268          | + 4.1%        | 3,671,345            | - 2.0%        | 13,494,138            | - 4.7%        |
| Other*            | 6,134,569          | - 9.3%        | 20,203,088           | - 7.6%        | 91,669,543            | + 7.3%        |

## Average Price/LB

| Class             | 4 WEEKS           |               | 13 WEEKS      |               | 52 WEEKS      |               |
|-------------------|-------------------|---------------|---------------|---------------|---------------|---------------|
|                   | 03/28/11-04/24/11 | % Change      | WE 04/24/11   | % Change      | WE 04/24/11   | % Change      |
| <b>TOTAL MEAT</b> | <b>\$2.94</b>     | <b>+ 8.6%</b> | <b>\$2.95</b> | <b>+ 9.3%</b> | <b>\$2.78</b> | <b>+ 7.0%</b> |
| Beef              | \$4.14            | + 13.1%       | \$3.91        | + 12.6%       | \$3.76        | + 8.2%        |
| Chicken           | \$2.09            | + 3.0%        | \$2.05        | + 3.4%        | \$2.03        | + 3.4%        |
| Pork              | \$2.38            | + 9.1%        | \$2.58        | + 11.5%       | \$2.55        | + 10.8%       |
| Turkey            | \$2.38            | + 10.4%       | \$2.59        | + 10.2%       | \$1.66        | + 6.0%        |
| Lamb              | \$6.49            | + 29.5%       | \$6.47        | + 22.4%       | \$6.32        | + 15.8%       |
| Veal              | \$6.61            | + 1.9%        | \$6.62        | + 3.0%        | \$6.58        | + 3.4%        |
| Other*            | \$3.42            | + 38.7%       | \$3.08        | + 21.5%       | \$2.65        | + 2.5%        |

\*Other includes Exotic, Non Meat and Unknown.



Sourced from FreshLook Data – Four Weeks Ending 04/24/11

Funded by The Beef Checkoff

**Total US - Feature Ad Top Line**  
**April 2011**

| <b>Ad Count - Total</b> |                   |              |              |              |               |              |
|-------------------------|-------------------|--------------|--------------|--------------|---------------|--------------|
|                         | 4 WEEKS           |              | 13 WEEKS     |              | 52 WEEKS      |              |
| CLASS                   | (3/27/11-4/23/11) | % Chg        | WE (4/23/11) | % Chg        | WE (4/23/11)  | % Chg        |
| <b>TOTAL MEAT</b>       | <b>20830</b>      | <b>-5.7%</b> | <b>63810</b> | <b>-9.6%</b> | <b>264086</b> | <b>-9.9%</b> |
| Beef                    | 7353              | -21.0%       | 25520        | -18.7%       | 111497        | -12.7%       |
| Chicken                 | 4570              | -2.6%        | 15771        | 0.6%         | 60951         | -5.1%        |
| Pork                    | 6533              | 12.9%        | 16958        | -1.4%        | 66800         | -10.0%       |
| Turkey                  | 1673              | 24.8%        | 3744         | -1.3%        | 16907         | -4.5%        |
| Lamb                    | 589               | -17.6%       | 1287         | -27.5%       | 5302          | -14.5%       |
| Veal                    | 112               | -53.9%       | 530          | -26.7%       | 2629          | -13.4%       |

| <b>Ad Count - "A"</b> |                   |              |              |               |               |               |
|-----------------------|-------------------|--------------|--------------|---------------|---------------|---------------|
|                       | 4 WEEKS           |              | 13 WEEKS     |               | 52 WEEKS      |               |
| CLASS                 | (3/27/11-4/23/11) | % Chg        | WE (4/23/11) | % Chg         | WE (4/23/11)  | % Chg         |
| <b>TOTAL MEAT</b>     | <b>8715</b>       | <b>-7.3%</b> | <b>26445</b> | <b>-14.7%</b> | <b>109008</b> | <b>-17.4%</b> |
| Beef                  | 3217              | -23.2%       | 11637        | -23.4%        | 50316         | -19.9%        |
| Chicken               | 1928              | -5.6%        | 6972         | -0.4%         | 25946         | -11.0%        |
| Pork                  | 2885              | 11.7%        | 6702         | -8.1%         | 26301         | -16.5%        |
| Turkey                | 578               | 25.4%        | 979          | -20.8%        | 5958          | -18.7%        |
| Lamb                  | 99                | -20.8%       | 129          | -47.8%        | 416           | -53.8%        |
| Veal                  | 8                 | 33.3%        | 26           | 13.0%         | 71            | -65.0%        |

| <b>Ad Share - Total</b> |                   |                |               |                |               |                |
|-------------------------|-------------------|----------------|---------------|----------------|---------------|----------------|
|                         | 4 WEEKS           |                | 13 WEEKS      |                | 52 WEEKS      |                |
| CLASS                   | (3/27/11-4/23/11) | Pt Chg         | WE (4/23/11)  | Pt Chg         | WE (4/23/11)  | Pt Chg         |
| <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                    | 35.3%             | -6.8 Pts       | 39.99%        | -4.5 Pts       | 42.22%        | -1.4 Pts       |
| Chicken                 | 21.94%            | 0.7 Pts        | 24.72%        | 2.5 Pts        | 23.08%        | 1.2 Pts        |
| Pork                    | 31.36%            | 5.2 Pts        | 26.58%        | 2.2 Pts        | 25.29%        | 0.0 Pts        |
| Turkey                  | 8.03%             | 2.0 Pts        | 5.87%         | 0.5 Pts        | 6.4%          | 0.4 Pts        |
| Lamb                    | 2.83%             | -0.4 Pts       | 2.02%         | -0.5 Pts       | 2.01%         | -0.1 Pts       |
| Veal                    | 0.54%             | -0.6 Pts       | 0.83%         | -0.2 Pts       | 1.0%          | 0.0 Pts        |

| <b>Category Average Advertised Price/Lb - Total ( 2 Yrs )<sup>1</sup></b> |                   |             |               |             |               |             |
|---|-------------------|-------------|---------------|-------------|---------------|-------------|
|   | 4 WEEKS           |             | 13 WEEKS      |             | 52 WEEKS      |             |
| Class   | (3/27/11-4/23/11) | % Chg       | WE (4/23/11)  | % Chg       | WE (4/23/11)  | % Chg       |
| <b>TOTAL MEAT</b>   | <b>\$3.55</b>     | <b>5.2%</b> | <b>\$3.54</b> | <b>5.7%</b> | <b>\$3.51</b> | <b>4.9%</b> |
| Beef  | \$4.98            | 13.1%       | \$4.70        | 10.5%       | \$4.59        | 5.5%        |
| Chicken   | \$2.26            | 9.1%        | \$2.21        | 6.2%        | \$2.16        | 2.0%        |
| Pork  | \$2.66            | 4.9%        | \$2.74        | 7.7%        | \$2.70        | 6.9%        |
| Turkey  | \$2.43            | 3.9%        | \$2.70        | 9.7%        | \$2.50        | 8.8%        |
| Lamb  | \$7.02            | 17.7%       | \$7.15        | 16.4%       | \$7.01        | 17.2%       |
| Veal  | \$7.36            | 10.4%       | \$7.12        | 1.7%        | \$7.20        | 9.7%        |

<sup>1</sup>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"

