

**FreshLook and Promodata
August '09 Highlights**

1. In August, dollar sales for all proteins were up (+3.8%) and beef (+3.7%), chicken (+3.6%) and pork (+3.9%) were up almost equally compared with August of last year.
2. Pound sales for beef (+11.9%) were ahead of the gains for chicken (+10.6%) but not as great as the increase pork enjoyed (+14.3%).
3. The average price per pound for all meat proteins (-7.4%) fell, and beef's decline (-7.3%) was greater on a percentage basis than chicken (-6.3%) but less than pork (-9.1%).
4. Featuring for all meat proteins increased (+4.1%), and beef's increase (+5.6%) exceeded both chicken (-.9%) and pork (+4.6%).
5. Total A ads increased (+.4%), and beef (+1.3%) exceeded both chicken (-2.2%) and pork (-6.6%).

Total US – Fresh Meat Sales

August 2009

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/27/09-08/23/09	% Change	WE 08/23/09	% Change	WE 08/23/09	% Change
TOTAL MEAT	\$2,248,706,280	+ 3.8%	\$7,410,487,128	+ 3.0%	\$30,480,692,729	+ 4.9%
Beef	\$1,215,942,119	+ 3.7%	\$4,039,867,241	+ 3.0%	\$15,944,557,963	+ 4.7%
Chicken	\$523,035,501	+ 3.6%	\$1,699,766,213	+ 3.5%	\$6,659,680,016	+ 6.0%
Pork	\$417,107,054	+ 3.9%	\$1,384,120,363	+ 2.6%	\$6,001,814,427	+ 5.2%
Turkey	\$58,272,133	+ 10.9%	\$175,379,868	+ 4.5%	\$1,345,692,577	+ 3.1%
Lamb	\$17,278,453	- 2.8%	\$56,634,438	- 3.6%	\$267,526,694	- 2.2%
Veal	\$5,627,777	- 7.5%	\$18,334,297	- 4.4%	\$88,118,740	- 6.0%
Other*	\$11,443,244	- 2.4%	\$36,384,709	- 2.1%	\$173,302,313	+ 7.3%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/27/09-08/23/09	% Change	WE 08/23/09	% Change	WE 08/23/09	% Change
TOTAL MEAT	807,213,948	+ 12.1%	2,647,887,354	+ 8.8%	11,131,761,187	+ 5.5%
Beef	338,330,360	+ 11.9%	1,122,553,669	+ 8.2%	4,352,350,734	+ 4.6%
Chicken	264,996,116	+ 10.6%	865,769,191	+ 9.0%	3,317,364,917	+ 7.8%
Pork	169,368,510	+ 14.3%	558,705,247	+ 10.8%	2,460,333,409	+ 7.4%
Turkey	25,711,597	+ 22.3%	72,847,409	+ 6.0%	869,386,625	- 2.0%
Lamb	2,994,470	- 4.3%	9,770,656	- 7.1%	47,917,889	- 8.9%
Veal	835,340	- 3.2%	2,667,422	- 2.6%	12,634,485	- 12.6%
Other*	4,977,554	+ 2.1%	15,573,761	- 1.5%	71,773,129	+ 6.2%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	07/27/09-08/23/09	% Change	WE 08/23/09	% Change	WE 08/23/09	% Change
TOTAL MEAT	\$2.79	- 7.4%	\$2.80	- 5.4%	\$2.74	- 0.5%
Beef	\$3.59	- 7.3%	\$3.60	- 4.8%	\$3.66	+ 0.1%
Chicken	\$1.97	- 6.3%	\$1.96	- 5.1%	\$2.01	- 1.7%
Pork	\$2.46	- 9.1%	\$2.48	- 7.4%	\$2.44	- 2.0%
Turkey	\$2.27	- 9.3%	\$2.41	- 1.4%	\$1.55	+ 5.2%
Lamb	\$5.77	+ 1.6%	\$5.80	+ 3.8%	\$5.58	+ 7.4%
Veal	\$6.74	- 4.4%	\$6.87	- 1.8%	\$6.97	+ 7.5%
Other*	\$2.30	- 4.3%	\$2.34	- 0.6%	\$2.41	+ 1.0%

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

Sourced from FreshLook Data - Four Weeks Ending 08/23/09



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
August 2009

Ad Count - Total						
CLASS	4 WEEKS		13 WEEKS		52 WEEKS	
	(7/26/09 - 8/22/09)	% Chg	WE (8/22/09)	% Chg	WE (8/22/09)	% Chg
TOTAL MEAT	21384	4.1%	70745	6.3%	285345	2.0%
Beef	9979	5.6%	32364	4.1%	122368	2.5%
Chicken	4859	-0.9%	16880	8.5%	62455	3.2%
Pork	4394	4.6%	14582	9.6%	56294	2.3%
Turkey	927	3.8%	3066	8.6%	17860	2.7%
Ham	645	12.2%	2137	-0.7%	18050	-7.9%
Lamb	357	-2.7%	1021	-12.5%	5595	-7.0%
Veal	223	47.7%	695	51.4%	2723	61.6%

Ad Count - "A"						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(7/26/09 - 8/22/09)	% Chg	WE (8/22/09)	% Chg	WE (8/22/09)	% Chg
TOTAL MEAT	9426	0.4%	31036	0.9%	132589	-0.2%
Beef	4887	1.3%	15942	-0.8%	62730	-0.7%
Chicken	2261	-2.2%	7639	5.4%	28621	2.8%
Pork	1835	-6.6%	6130	-1.8%	24648	-1.4%
Turkey	245	96.0%	786	50.6%	7460	8.7%
Ham	120	3.4%	387	-8.3%	7964	-6.1%
Lamb	68	78.9%	111	-42.2%	933	-30.4%
Veal	10	100.0%	41	-16.3%	233	45.6%

Ad Share - Total						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(7/26/09 - 8/22/09)	Pt Chg	WE (8/22/09)	Pt Chg	WE (8/22/09)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	46.67%	0.7 Pts	45.75%	-1.0 Pts	42.88%	0.2 Pts
Chicken	22.72%	-1.2 Pts	23.86%	0.5 Pts	21.89%	0.2 Pts
Pork	20.55%	0.1 Pts	20.61%	0.6 Pts	19.73%	0.1 Pts
Turkey	4.34%	0.0 Pts	4.33%	0.1 Pts	6.26%	0.0 Pts
Ham	3.02%	0.2 Pts	3.02%	-0.2 Pts	6.33%	-0.7 Pts
Lamb	1.67%	-0.1 Pts	1.44%	-0.3 Pts	1.96%	-0.2 Pts
Veal	1.04%	0.3 Pts	0.98%	0.3 Pts	0.95%	0.4 Pts

Category Average Advertised Price/LB - Total (2 Yrs)¹						
Class	4 WEEKS		13 WEEKS		52 WEEKS	
	(7/26/09 - 8/22/09)	% Chg	WE (8/22/09)	% Chg	WE (8/22/09)	% Chg
TOTAL MEAT	\$3.40	-6.9%	\$3.37	-6.0%	\$3.47	1.90%
Beef	\$4.33	-8.1%	\$4.29	-6.3%	\$4.55	1.41%
Chicken	\$2.11	-4.2%	\$2.15	-0.5%	\$2.16	3.02%
Pork	\$2.61	-8.8%	\$2.59	-8.7%	\$2.70	1.06%
Turkey	\$2.77	-4.2%	\$2.86	2.9%	\$2.36	3.21%
Ham	\$2.71	-14.6%	\$2.67	-12.0%	\$2.64	2.48%
Lamb	\$5.74	-0.4%	\$6.03	2.1%	\$6.01	6.42%
Veal	\$6.02	-2.6%	\$6.24	-4.5%	\$6.74	-5.71%

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"

