

## **FreshLook and Promodata January 2010 Highlights**

1. January dollar sales for beef were down (-3.3%) versus the prior year, which was mainly driven by a decline in average price. Chicken dollar sales declined (-1.9%) while Pork remained steady (0.0%). Beef's decline in dollar sales is slightly more than the decline in total meat category sales (-2.1%) 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 rose (+3.4%) but were slightly less than the growth for the total meat category (+3.9%). Beef's increase was higher than chicken pound sales (+2.4%) but less than pork's growth (+7.4%). Beef's pound sales have grown strongly versus year ago periods, registering a 4.7% increase for the quarter and a 6.9% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-6.5%) to \$3.38/lb. This decrease is greater than the decline for chicken (-4.1%) but less than pork's decline (-6.9%). 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 significantly in January for beef (+5.3%) which is greater than activity for both chicken (-1.5%) and pork total ads (-4.0%). Beef has gained ad share for all reporting periods and maintains 39.50% to 45.17% of all meat ads.
5. "A" ad activity for total meat decreased (-2.3%) for January. Beef "A" ads slightly declined (-0.1%) compared to greater declines in chicken (-6.3%) and in pork (-3.5%). Despite the slight decline, beef still represents the largest share (49.01%) of all "A" ad activity.

# Total US – Fresh Meat Sales

January 2010

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/28/09-01/24/10	% Change	WE 01/24/10	% Change	WE 01/24/10	% Change
<b>TOTAL MEAT</b>	<b>\$2,332,982,535</b>	<b>- 2.1%</b>	<b>\$7,843,937,291</b>	<b>- 2.2%</b>	<b>\$30,343,857,715</b>	<b>+ 2.2%</b>
Beef	\$1,217,500,037	- 3.3%	\$3,783,059,892	- 2.9%	\$15,867,702,307	+ 2.2%
Chicken	\$542,611,429	- 1.9%	\$1,565,169,063	- 0.5%	\$6,652,622,426	+ 2.7%
Pork	\$458,646,604	0.0%	\$1,654,939,167	- 2.0%	\$5,970,056,626	+ 2.1%
Turkey	\$69,295,982	- 1.9%	\$686,354,710	- 4.6%	\$1,316,808,189	+ 0.4%
Lamb	\$21,702,696	+ 4.0%	\$73,494,300	+ 6.6%	\$273,035,577	+ 2.0%
Veal	\$7,882,039	+ 2.3%	\$23,352,958	- 0.5%	\$87,845,399	- 1.5%
Other*	\$15,343,748	+ 7.4%	\$57,567,202	+ 5.3%	\$175,787,191	+ 2.5%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/28/09-01/24/10	% Change	WE 01/24/10	% Change	WE 01/24/10	% Change
<b>TOTAL MEAT</b>	<b>883,394,844</b>	<b>+ 3.9%</b>	<b>3,287,968,803</b>	<b>+ 4.1%</b>	<b>11,452,282,788</b>	<b>+ 7.0%</b>
Beef	360,528,622	+ 3.4%	1,094,132,629	+ 4.7%	4,486,601,903	+ 6.9%
Chicken	281,356,788	+ 2.4%	798,682,714	+ 3.7%	3,388,744,411	+ 6.7%
Pork	198,150,850	+ 7.4%	762,823,942	+ 6.4%	2,563,397,984	+ 9.4%
Turkey	32,197,513	+ 1.7%	593,192,180	+ 0.6%	879,590,938	+ 3.0%
Lamb	4,046,349	+ 9.4%	13,683,739	+ 12.7%	49,998,883	+ 1.1%
Veal	1,171,661	+ 6.8%	3,452,582	+ 4.2%	12,867,204	+ 1.6%
Other*	5,943,061	+ 2.3%	22,001,016	- 1.7%	71,081,465	0.0%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	12/28/09-01/24/10	% Change	WE 01/24/10	% Change	WE 01/24/10	% Change
<b>TOTAL MEAT</b>	<b>\$2.64</b>	<b>- 5.8%</b>	<b>\$2.39</b>	<b>- 6.0%</b>	<b>\$2.65</b>	<b>- 4.5%</b>
Beef	\$3.38	- 6.5%	\$3.46	- 7.2%	\$3.54	- 4.4%
Chicken	\$1.93	- 4.1%	\$1.96	- 4.0%	\$1.96	- 3.7%
Pork	\$2.31	- 6.9%	\$2.17	- 7.9%	\$2.33	- 6.7%
Turkey	\$2.15	- 3.5%	\$1.16	- 5.2%	\$1.50	- 2.5%
Lamb	\$5.36	- 4.9%	\$5.37	- 5.4%	\$5.46	+ 0.9%
Veal	\$6.73	- 4.2%	\$6.76	- 4.5%	\$6.83	- 3.0%
Other*	\$2.58	+ 5.0%	\$2.62	+ 7.2%	\$2.47	+ 2.5%

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

Sourced from FreshLook Data – Four Weeks Ending 01/24/10



Funded by The Beef Checkoff

**Total US - Feature Ad Top Line**  
**January 2010**

<b>Ad Count - Total</b>						
	<b>5 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>CLASS</b>	<b>(12/27/09 - 1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>21437</b>	<b>0.5%</b>	<b>76272</b>	<b>2.7%</b>	<b>294453</b>	<b>5.2%</b>
Beef	9683	5.3%	30129	6.8%	127020	6.1%
Chicken	5268	-1.5%	14182	-1.5%	64424	4.1%
Pork	5033	-4.0%	21981	-0.6%	75912	4.3%
Turkey	833	-14.7%	7266	0.9%	17932	2.0%
Lamb	384	9.4%	1994	14.9%	6131	3.2%
Veal	236	9.3%	720	13.4%	3034	44.7%

  

<b>Ad Count - "A"</b>						
	<b>5 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>CLASS</b>	<b>(12/27/09 - 1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>9579</b>	<b>-2.3%</b>	<b>35541</b>	<b>-0.4%</b>	<b>134976</b>	<b>1.9%</b>
Beef	4695	-0.1%	14656	0.5%	63588	0.8%
Chicken	2477	-6.3%	6423	-0.8%	29605	4.1%
Pork	2098	-3.5%	9850	-3.9%	32976	1.7%
Turkey	245	6.1%	4186	3.8%	7498	5.4%
Lamb	50	28.2%	376	18.6%	1060	-8.2%
Veal	14	-33.3%	50	-5.7%	249	26.4%

  

<b>Ad Share - Total</b>						
	<b>5 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>CLASS</b>	<b>(12/27/09 - 1/23/10)</b>	<b>Pt Chg</b>	<b>WE (1/23/10)</b>	<b>Pt Chg</b>	<b>WE (1/23/10)</b>	<b>Pt Chg</b>
<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	45.17%	2.1 Pts	39.5%	1.5 Pts	43.14%	0.4 Pts
Chicken	24.57%	-0.5 Pts	18.59%	-0.8 Pts	21.88%	-0.2 Pts
Pork	23.48%	-1.1 Pts	28.82%	-1.0 Pts	25.78%	-0.2 Pts
Turkey	3.89%	-0.7 Pts	9.53%	-0.2 Pts	6.09%	-0.2 Pts
Lamb	1.79%	0.1 Pts	2.61%	0.3 Pts	2.08%	0.0 Pts
Veal	1.1%	0.1 Pts	0.94%	0.1 Pts	1.03%	0.3 Pts

  

<b>Category Average Advertised Price/LB - Total ( 2 Yrs )<sup>1</sup></b>						
	<b>5 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>Class</b>	<b>(12/27/09 - 1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>	<b>WE (1/23/10)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>\$3.30</b>	<b>-3.8%</b>	<b>\$3.30</b>	<b>-5.1%</b>	<b>\$3.36</b>	<b>-4.3%</b>
Beef	\$4.25	-3.3%	\$4.54	-5.6%	\$4.40	-4.7%
Chicken	\$2.13	-5.1%	\$2.12	-3.7%	\$2.13	-1.4%
Pork	\$2.44	-9.9%	\$2.42	-11.0%	\$2.54	-7.7%
Turkey	\$2.73	0.4%	\$1.84	-5.5%	\$2.29	-2.3%
Lamb	\$5.49	-5.5%	\$5.82	-3.9%	\$5.88	-0.7%
Veal	\$6.31	-2.9%	\$6.78	-6.8%	\$6.54	-10.3%

<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"

