

FreshLook and Promodata June 2010 Highlights

1. June dollar sales for beef (+3.4%) increased versus the prior year. Chicken (+4.6%) and pork (+6.0%) also saw an increase in dollar sales. Beef's rise in dollar sales compares to a similar increase in total meat category sales (+4.0%) 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 year ago were down (-4.6%). The total meat category (-2.3%) and pork pound sales (-2.4%) were down, while chicken pounds were up (+1.3%). Beef's pound sales have grown strongly versus year ago periods, registering a 3.5% increase for the latest 52 weeks.
3. The average price per pound for beef significantly increased (+8.5%) to \$3.93/lb. This increase is greater than the increase for chicken (+3.2%) and similar to the pork increase (+8.6%). The average price per pound for beef is running below the like period from the prior year for the latest 52-week period.
4. Retail feature activity decreased in May for beef (-6.1%) which is a smaller decline than activity for chicken (-9.9%) and pork ad activity significantly declined (-13.6%). Beef has gained ad share for the latest 4-, 13- and 52 week periods and maintains 43.68% to 46.25% of all meat ads.
5. "A" ad activity for total meat decreased (-13.6%) for June. Beef "A" ads declined (-10.5%) compared to a larger decline in chicken (-20.0%) and pork (-11.3%). Despite the decline, beef still represents the largest share (52.43%) of all "A" ad activity.

Total US – Fresh Meat Sales

June 2010

Dollars - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/24/10-06/27/10	% Change	WE 06/27/10	% Change	WE 06/27/10	% Change
TOTAL MEAT	\$2,942,092,495	+ 4.0%	\$7,551,609,122	- 0.4%	\$30,182,214,797	- 0.5%
Beef	\$1,607,360,500	+ 3.4%	\$4,017,407,624	- 0.4%	\$15,766,534,871	- 0.6%
Chicken	\$673,226,455	+ 4.6%	\$1,700,109,654	+ 1.4%	\$6,658,472,545	+ 0.6%
Pork	\$553,264,476	+ 6.0%	\$1,502,043,219	- 1.4%	\$5,926,304,135	- 0.8%
Turkey	\$61,480,783	- 5.8%	\$190,299,499	- 9.9%	\$1,286,169,996	- 3.9%
Lamb	\$23,004,060	+ 3.3%	\$78,033,504	- 2.8%	\$273,372,749	+ 1.7%
Veal	\$7,034,145	- 4.1%	\$20,036,834	- 0.7%	\$86,822,419	- 2.4%
Other*	\$16,722,077	+ 19.0%	\$43,678,787	+ 13.3%	\$184,538,082	+ 6.0%

Pounds - Total

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/24/10-06/27/10	% Change	WE 06/27/10	% Change	WE 06/27/10	% Change
TOTAL MEAT	975,731,852	- 2.3%	2,614,164,664	- 4.1%	11,343,743,143	+ 3.4%
Beef	409,299,559	- 4.6%	1,057,282,660	- 4.9%	4,438,471,403	+ 3.5%
Chicken	329,735,675	+ 1.3%	838,998,995	+ 0.2%	3,395,151,729	+ 4.0%
Pork	202,411,752	- 2.4%	602,155,377	- 6.7%	2,517,974,801	+ 4.2%
Turkey	23,296,018	- 10.8%	82,197,707	- 14.9%	858,271,075	- 0.7%
Lamb	3,598,070	- 7.5%	13,741,623	- 10.5%	48,999,975	+ 1.3%
Veal	1,002,955	- 5.4%	2,903,428	- 1.0%	12,798,504	+ 0.5%
Other*	6,387,823	+ 10.3%	16,884,873	+ 3.4%	72,075,656	+ 0.3%

Average Price/LB

Class	5 WEEKS		13 WEEKS		52 WEEKS	
	05/24/10-06/27/10	% Change	WE 06/27/10	% Change	WE 06/27/10	% Change
TOTAL MEAT	\$3.02	+ 6.5%	\$2.89	+ 3.8%	\$2.66	- 3.8%
Beef	\$3.93	+ 8.5%	\$3.80	+ 4.7%	\$3.55	- 4.0%
Chicken	\$2.04	+ 3.2%	\$2.03	+ 1.2%	\$1.96	- 3.2%
Pork	\$2.73	+ 8.6%	\$2.49	+ 5.7%	\$2.35	- 4.8%
Turkey	\$2.64	+ 5.7%	\$2.32	+ 5.9%	\$1.50	- 3.2%
Lamb	\$6.39	+ 11.7%	\$5.68	+ 8.6%	\$5.58	+ 0.4%
Veal	\$7.01	+ 1.4%	\$6.90	+ 0.3%	\$6.78	- 2.9%
Other*	\$2.62	+ 7.9%	\$2.59	+ 9.6%	\$2.56	+ 5.7%

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

Sourced from FreshLook Data – Five Weeks Ending 06/27/10



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
June 2010

Ad Count - Total						
CLASS	5 WEEKS		13 WEEKS		52 WEEKS	
	(5/23/10 - 6/26/10)	% Chg	WE (6/26/10)	% Chg	WE (6/26/10)	% Chg
TOTAL MEAT	25635	-8.3%	68396	-8.0%	288588	0.9%
Beef	11857	-6.1%	30711	-4.4%	126067	2.8%
Chicken	6195	-9.9%	15682	-6.8%	63189	0.2%
Pork	5713	-13.6%	16245	-15.3%	72520	-2.1%
Turkey	1179	1.6%	3506	-7.9%	17676	-1.5%
Lamb	451	19.6%	1532	-2.7%	6196	7.2%
Veal	240	-17.2%	720	-8.3%	2940	11.1%

Ad Count - "A"						
CLASS	5 WEEKS		13 WEEKS		52 WEEKS	
	(5/23/10 - 6/26/10)	% Chg	WE (6/26/10)	% Chg	WE (6/26/10)	% Chg
TOTAL MEAT	10380	-13.6%	28300	-16.9%	127899	-4.2%
Beef	5442	-10.5%	14097	-13.5%	60990	-3.1%
Chicken	2524	-20.0%	6659	-13.0%	28188	-3.1%
Pork	2178	-11.3%	6491	-23.9%	30476	-7.1%
Turkey	210	-25.3%	876	-26.6%	7220	-2.4%
Lamb	23	-8.0%	164	-51.5%	855	-11.9%
Veal	3	-86.4%	13	-78.3%	170	-28.9%

Ad Share - Total						
CLASS	5 WEEKS		13 WEEKS		52 WEEKS	
	(5/23/10 - 6/26/10)	Pt Chg	WE (6/26/10)	Pt Chg	WE (6/26/10)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	46.25%	1.1 Pts	44.9%	1.7 Pts	43.68%	0.8 Pts
Chicken	24.17%	-0.4 Pts	22.93%	0.3 Pts	21.9%	-0.1 Pts
Pork	22.29%	-1.4 Pts	23.75%	-2.1 Pts	25.13%	-0.8 Pts
Turkey	4.6%	0.4 Pts	5.13%	0.0 Pts	6.12%	-0.1 Pts
Lamb	1.76%	0.4 Pts	2.24%	0.1 Pts	2.15%	0.1 Pts
Veal	0.94%	-0.1 Pts	1.05%	0.0 Pts	1.02%	0.1 Pts

Category Average Advertised Price/Lb - Total (2 Yrs)¹						
Class	5 WEEKS		13 WEEKS		52 WEEKS	
	(5/23/10 - 6/26/10)	% Chg	WE (6/26/10)	% Chg	WE (6/26/10)	% Chg
TOTAL MEAT	\$3.65	8.5%	\$3.52	4.1%	\$3.38	-3.6%
Beef	\$4.66	8.8%	\$4.54	2.8%	\$4.39	-4.7%
Chicken	\$2.18	0.2%	\$2.13	-0.3%	\$2.13	-2.1%
Pork	\$2.82	8.6%	\$2.68	4.2%	\$2.55	-6.5%
Turkey	\$3.05	8.0%	\$2.72	10.7%	\$2.34	-0.3%
Lamb	\$6.91	11.6%	\$6.39	9.4%	\$6.06	1.0%
Veal	\$7.44	19.6%	\$6.99	8.0%	\$6.74	-0.7%

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"

