

FreshLook and Promodata May 2010 Highlights

1. May dollar sales for beef (-5.6%) were down versus the prior year. Chicken (-2.2%) and Pork (-3.1%) also saw a decrease in dollar sales. Beef's decline in dollar sales compares to a decrease in total meat category sales (-4.3%) 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 (-7.6%). The total meat category (-5.8%) chicken pound sales (-2.8%) and pork pounds declined (-5.5%). Beef's pound sales have grown strongly versus year ago periods, registering a 4.5% increase for the latest 52 weeks.
3. The average price per pound for beef increased (+2.2%) to \$3.74/lb. This increase is greater than the slight increase for chicken (+0.6%) and similar to the pork increase (+2.5%). 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 (-9.2) which is a larger decline than activity for chicken (-7.7%) and pork ad activity significantly declined (-14.6%). Beef has gained ad share for the latest 4-, 13- and 52 week periods and maintains 43.6% to 46.21% of all meat ads.
5. "A" ad activity for total meat decreased (-22.3%) for May. Beef "A" ads declined (-21.9%) compared to a decline in chicken (-14.6%) and a significant decline in pork (-30.0%). Despite the decline, beef still represents the largest share (52.54%) of all "A" ad activity.

Total US – Fresh Meat Sales

May 2010

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/26/10-05/23/10	% Change	WE 05/23/10	% Change	WE 05/23/10	% Change
TOTAL MEAT	\$2,285,323,137	- 4.3%	\$7,346,617,208	- 2.9%	\$30,068,503,555	- 0.7%
Beef	\$1,234,501,337	- 5.6%	\$3,883,320,570	- 3.2%	\$15,713,253,188	- 0.7%
Chicken	\$525,547,924	- 2.2%	\$1,652,878,767	- 1.1%	\$6,628,888,911	+ 0.4%
Pork	\$430,954,435	- 3.1%	\$1,456,063,342	- 3.6%	\$5,894,804,543	- 1.2%
Turkey	\$54,962,018	- 9.2%	\$206,942,074	- 9.9%	\$1,289,921,702	- 3.6%
Lamb	\$19,576,493	- 0.5%	\$81,328,383	- 0.8%	\$272,648,187	+ 1.1%
Veal	\$6,498,867	+ 4.7%	\$21,994,075	- 2.3%	\$87,120,344	- 2.1%
Other*	\$13,282,064	+ 16.8%	\$44,089,998	+ 10.2%	\$181,866,680	+ 4.5%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/26/10-05/23/10	% Change	WE 05/23/10	% Change	WE 05/23/10	% Change
TOTAL MEAT	789,591,744	- 5.8%	2,648,833,058	- 3.4%	11,366,904,599	+ 4.1%
Beef	330,447,263	- 7.6%	1,082,292,529	- 3.5%	4,458,379,419	+ 4.5%
Chicken	261,220,248	- 2.8%	829,143,525	- 0.2%	3,390,851,560	+ 4.5%
Pork	166,243,151	- 5.5%	609,568,287	- 5.5%	2,522,943,246	+ 4.9%
Turkey	22,353,334	- 16.2%	92,793,728	- 14.2%	861,101,168	- 0.5%
Lamb	3,204,405	- 6.6%	14,826,015	- 5.7%	49,293,196	+ 1.3%
Veal	949,008	+ 5.0%	3,237,555	- 0.5%	12,855,529	+ 1.2%
Other*	5,174,335	+ 5.8%	16,971,419	0.0%	71,480,482	- 0.7%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	04/26/10-05/23/10	% Change	WE 05/23/10	% Change	WE 05/23/10	% Change
TOTAL MEAT	\$2.89	+ 1.6%	\$2.77	+ 0.5%	\$2.65	- 4.6%
Beef	\$3.74	+ 2.2%	\$3.59	+ 0.4%	\$3.52	- 5.0%
Chicken	\$2.01	+ 0.6%	\$1.99	- 0.9%	\$1.95	- 3.9%
Pork	\$2.59	+ 2.5%	\$2.39	+ 2.0%	\$2.34	- 5.8%
Turkey	\$2.46	+ 8.3%	\$2.23	+ 5.0%	\$1.50	- 3.1%
Lamb	\$6.11	+ 6.5%	\$5.49	+ 5.2%	\$5.53	- 0.2%
Veal	\$6.85	- 0.3%	\$6.79	- 1.9%	\$6.78	- 3.2%
Other*	\$2.57	+ 10.3%	\$2.60	+ 10.3%	\$2.54	+ 5.3%

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

Sourced from FreshLook Data – Four Weeks Ending 05/23/10



Funded by The Beef Checkoff

Total US - Feature Ad Top Line
May 2010

Ad Count - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(4/25/10 - 5/22/10)	% Chg	WE (5/22/10)	% Chg	WE (5/22/10)	% Chg
TOTAL MEAT	20558	-10.2%	70042	-4.5%	290776	2.6%
Beef	9500	-9.2%	30960	-1.9%	126783	4.2%
Chicken	4764	-7.7%	15547	-3.6%	63839	2.8%
Pork	4715	-14.6%	17136	-10.2%	73394	0.1%
Turkey	981	-5.1%	3940	-3.7%	17653	-1.1%
Lamb	362	-18.7%	1739	1.5%	6118	4.5%
Veal	236	-16.3%	720	-9.3%	2989	18.6%

Ad Count - "A"						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(4/25/10 - 5/22/10)	% Chg	WE (5/22/10)	% Chg	WE (5/22/10)	% Chg
TOTAL MEAT	8455	-22.3%	30240	-13.0%	129477	-2.6%
Beef	4442	-21.9%	14809	-10.0%	61602	-2.2%
Chicken	2072	-14.6%	6824	-9.6%	28798	0.7%
Pork	1719	-30.0%	7105	-20.4%	30743	-6.1%
Turkey	204	-14.3%	1242	-10.9%	7290	-0.4%
Lamb	14	-76.7%	237	-36.3%	855	-18.5%
Veal	4	-77.8%	23	-65.7%	189	-21.6%

Ad Share - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(4/25/10 - 5/22/10)	Pt Chg	WE (5/22/10)	Pt Chg	WE (5/22/10)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	46.21%	0.5 Pts	44.2%	1.2 Pts	43.6%	0.7 Pts
Chicken	23.17%	0.6 Pts	22.2%	0.2 Pts	21.95%	0.0 Pts
Pork	22.94%	-1.2 Pts	24.47%	-1.5 Pts	25.24%	-0.7 Pts
Turkey	4.77%	0.3 Pts	5.63%	0.0 Pts	6.07%	-0.2 Pts
Lamb	1.76%	-0.2 Pts	2.48%	0.1 Pts	2.1%	0.0 Pts
Veal	1.15%	-0.1 Pts	1.03%	-0.1 Pts	1.03%	0.1 Pts

Category Average Advertised Price/Lb - Total (2 Yrs)¹						
	4 WEEKS		13 WEEKS		52 WEEKS	
Class	(4/25/10 - 5/22/10)	% Chg	WE (5/22/10)	% Chg	WE (5/22/10)	% Chg
TOTAL MEAT	\$3.53	1.9%	\$3.39	0.1%	\$3.35	-4.8%
Beef	\$4.52	0.9%	\$4.33	-1.9%	\$4.36	-5.9%
Chicken	\$2.13	3.0%	\$2.11	-0.2%	\$2.13	-2.1%
Pork	\$2.67	1.4%	\$2.58	-0.2%	\$2.53	-7.8%
Turkey	\$2.84	10.5%	\$2.50	3.8%	\$2.32	-0.8%
Lamb	\$6.55	7.3%	\$6.12	5.5%	\$6.01	0.1%
Veal	\$6.86	12.5%	\$6.97	5.1%	\$6.63	-3.1%

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"

