

FreshLook and Promodata November 2009 Highlights

1. November dollar sales for beef (-4.1%) were down versus the prior year which was driven by a significant decline in average price. Both chicken (+0.5%) and pork (+0.3%) experienced slight increases in dollar sales. Beef's decline in dollar sales is more than the decline in total meat category sales (-2.4%) for the latest month. Beef's percent change has been consistent with the total meat category changes for the latest 13 and 52 week periods.
2. Pound sales for beef (+6.0%) exceeded the growth for the total meat category (+5.8%) and chicken (+4.7%) but was below pork's growth (+13.5%). Beef's pound sales have grown strongly versus year ago periods, registering a 10.0% increase for the quarter and a 6.2% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-9.5%) to \$3.39/lb. This decrease is greater than the decline for chicken (-4.0%) but less than the pork decline (-11.7%). 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 November for beef (+11.2%) which is greater than activity for both chicken (+2.5%) and pork total ads (+5.3%). Beef has gained ad share for all reporting periods and maintains 36.5% to 42.8% of all meat ads.
5. "A" ad activity for total meat increased (5.3%) for November. Beef "A" ads saw an increase (+3.9%) compared to increases in both chicken (+6.6%) and pork (+7.6%). Despite the slower pace of growth, beef still represents the largest share (35.7%) of all "A" ad activity.

Total US – Fresh Meat Sales

November 2009

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/26/09-11/22/09	% Change	WE 11/22/09	% Change	WE 11/22/09	% Change
TOTAL MEAT	\$2,454,148,187	- 2.4%	\$7,622,932,848	- 0.2%	\$30,463,284,786	+ 3.7%
Beef	\$1,138,131,470	- 4.1%	\$3,911,115,805	- 0.3%	\$15,931,036,798	+ 3.0%
Chicken	\$487,395,926	+ 0.5%	\$1,671,487,168	+ 0.2%	\$6,663,012,792	+ 3.3%
Pork	\$474,125,842	+ 0.3%	\$1,444,290,085	+ 0.2%	\$6,004,438,861	+ 4.2%
Turkey	\$309,835,731	- 5.1%	\$466,521,481	- 2.5%	\$1,333,551,078	+ 15.2%
Lamb	\$20,419,639	+ 6.2%	\$61,523,307	+ 3.6%	\$269,671,160	+ 0.2%
Veal	\$7,062,593	- 1.2%	\$22,768,361	- 1.1%	\$87,866,511	- 4.3%
Other*	\$17,176,986	+ 5.1%	\$45,226,641	+ 0.9%	\$173,707,585	+ 4.5%

Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/26/09-11/22/09	% Change	WE 11/22/09	% Change	WE 11/22/09	% Change
TOTAL MEAT	1,120,594,453	+ 5.8%	3,062,803,394	+ 9.0%	11,385,798,716	+ 8.3%
Beef	335,401,912	+ 6.0%	1,141,170,666	+ 10.0%	4,456,562,773	+ 6.2%
Chicken	247,819,264	+ 4.7%	873,583,975	+ 6.6%	3,371,392,866	+ 6.6%
Pork	212,068,353	+ 13.5%	627,206,567	+ 15.1%	2,542,818,927	+ 10.6%
Turkey	314,124,037	+ 2.0%	388,742,777	+ 3.4%	881,996,070	+ 22.7%
Lamb	3,809,018	+ 14.7%	11,159,071	+ 10.2%	48,950,137	- 3.1%
Veal	1,044,077	+ 5.4%	3,402,853	+ 4.5%	12,780,852	- 6.4%
Other*	6,327,791	- 2.6%	17,537,484	- 2.6%	71,297,090	+ 3.6%

Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	10/26/09-11/22/09	% Change	WE 11/22/09	% Change	WE 11/22/09	% Change
TOTAL MEAT	\$2.19	- 7.7%	\$2.49	- 8.5%	\$2.68	- 4.2%
Beef	\$3.39	- 9.5%	\$3.43	- 9.4%	\$3.57	- 3.0%
Chicken	\$1.97	- 4.0%	\$1.91	- 6.0%	\$1.98	- 3.0%
Pork	\$2.24	- 11.7%	\$2.30	- 13.0%	\$2.36	- 5.8%
Turkey	\$0.99	- 6.9%	\$1.20	- 5.7%	\$1.51	- 6.1%
Lamb	\$5.36	- 7.4%	\$5.51	- 6.0%	\$5.51	+ 3.5%
Veal	\$6.76	- 6.3%	\$6.69	- 5.3%	\$6.87	+ 2.3%
Other*	\$2.71	+ 7.9%	\$2.58	+ 3.6%	\$2.44	+ 0.9%

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



Sourced from FreshLook Data – Four Weeks Ending 11/22/09

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Total US - Feature Ad Top Line
November 2009

Ad Count - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(10/25/09 - 11/21/09)	% Chg	WE (11/21/09)	% Chg	WE (11/21/09)	% Chg
TOTAL MEAT	26489	7.3%	77339	6.0%	294263	5.1%
Beef	9666	11.2%	32315	6.9%	126068	5.0%
Chicken	4501	2.5%	16280	4.6%	64749	4.9%
Pork	7548	5.3%	19980	6.7%	76430	4.1%
Turkey	3888	5.6%	6367	-1.5%	18075	6.9%
Lamb	648	18.2%	1566	15.7%	5972	0.5%
Veal	238	9.2%	831	29.6%	2969	55.0%

Ad Count - "A"						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(10/25/09 - 11/21/09)	% Chg	WE (11/21/09)	% Chg	WE (11/21/09)	% Chg
TOTAL MEAT	12877	5.3%	35413	3.1%	135786	2.9%
Beef	4600	3.9%	15576	1.0%	63686	0.6%
Chicken	2064	6.6%	7353	3.8%	29784	5.8%
Pork	3467	7.6%	8696	9.3%	33617	3.4%
Turkey	2563	0.7%	3428	-6.6%	7360	11.4%
Lamb	148	97.3%	254	68.2%	1074	-9.5%
Veal	35	59.1%	106	43.2%	265	50.6%

Ad Share - Total						
	4 WEEKS		13 WEEKS		52 WEEKS	
CLASS	(10/25/09 - 11/21/09)	Pt Chg	WE (11/21/09)	Pt Chg	WE (11/21/09)	Pt Chg
TOTAL MEAT	100.0%	0.0 Pts	100.0%	0.0 Pts	100.0%	0.0 Pts
Beef	36.49%	1.3 Pts	41.78%	0.4 Pts	42.84%	0.0 Pts
Chicken	16.99%	-0.8 Pts	21.05%	-0.3 Pts	22.0%	0.0 Pts
Pork	28.49%	-0.5 Pts	25.83%	0.2 Pts	25.97%	-0.3 Pts
Turkey	14.68%	-0.2 Pts	8.23%	-0.6 Pts	6.14%	0.1 Pts
Lamb	2.45%	0.2 Pts	2.02%	0.2 Pts	2.03%	-0.1 Pts
Veal	0.9%	0.0 Pts	1.07%	0.2 Pts	1.01%	0.3 Pts

Category Average Advertised Price/LB - Total (2 Yrs)¹						
	4 WEEKS		13 WEEKS		52 WEEKS	
Class	(10/25/09 - 11/21/09)	% Chg	WE (11/21/09)	% Chg	WE (11/21/09)	% Chg
TOTAL MEAT	\$3.19	-6.5%	\$3.29	-8.5%	\$3.39	-2.7%
Beef	\$4.54	-6.5%	\$4.36	-8.9%	\$4.44	-3.1%
Chicken	\$2.08	-4.8%	\$2.14	-4.4%	\$2.14	0.0%
Pork	\$2.42	-13.7%	\$2.50	-13.4%	\$2.59	-4.6%
Turkey	\$1.72	1.7%	\$2.04	-2.6%	\$2.33	-0.4%
Lamb	\$5.85	-2.9%	\$5.84	-6.6%	\$5.94	2.1%
Veal	\$6.59	-15.3%	\$6.40	-11.2%	\$6.57	-10.5%

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"



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