

## **FreshLook and Promodata October '09 Highlights**

1. October dollar sales for beef (-0.7%) were slightly down versus the prior year at a very similar pace to both chicken (-0.4%) and pork (-0.7%). Beef's slight decline in dollar sales is consistent with the total meat category sales (-0.7%) for the latest month. Beef's growth has exceeded the total meat category growth for the latest 13 and 52 week periods.
2. Pound sales for beef (+9.5%) exceeded the growth for the total meat category (+8.1%) and chicken (+3.1%) but was below pork's growth (+15.9%). Beef's pound sales have grown strongly versus year ago periods, registering an 11.8% increase for the quarter and a 6.6% increase for the latest 52 weeks.
3. The average price per pound for beef fell (-9.3%) to \$3.38/lb. This decrease is greater than the decline for chicken (-3.4%) but less than the pork decline (-14.5%). 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 in October for beef (+1.5%) which is greater than activity for chicken (-0.6%) and less than the increase in pork total ads (+2.6%). Beef has gained ad share for all reporting periods and maintains 42.9% to 45.3% of all meat ads.
5. "A" ad activity for total meat is unchanged (0.0%) for October. Beef "A" ads saw a decline (-1.5%) with chicken seeing a positive change (+0.1%) and a significant increase in pork (+10.7%). Despite the decline, beef still represents 47.2% of all "A" ad activity.

# Total US – Fresh Meat Sales

October 2009

Dollars - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/28/09-10/25/09	% Change	WE 10/25/09	% Change	WE 10/25/09	% Change
<b>TOTAL MEAT</b>	<b>\$2,267,115,020</b>	<b>- 0.7%</b>	<b>\$7,417,490,941</b>	<b>+ 1.7%</b>	<b>\$30,522,397,452</b>	<b>+ 4.1%</b>
Beef	\$1,201,094,670	- 0.7%	\$3,988,926,453	+ 2.0%	\$15,979,154,435	+ 4.3%
Chicken	\$522,899,536	- 0.4%	\$1,707,126,743	+ 1.1%	\$6,660,625,194	+ 4.4%
Pork	\$430,421,594	- 0.9%	\$1,387,271,296	+ 1.2%	\$6,003,098,106	+ 4.1%
Turkey	\$72,205,226	- 2.4%	\$214,957,883	+ 5.0%	\$1,350,205,433	+ 2.7%
Lamb	\$18,787,116	+ 4.7%	\$58,382,121	+ 0.8%	\$268,479,454	- 0.4%
Veal	\$8,031,864	+ 7.3%	\$21,333,545	- 2.8%	\$87,954,608	- 4.9%
Other*	\$13,675,014	+ 0.4%	\$39,492,899	- 1.7%	\$172,880,222	+ 4.4%

## Pounds - Total

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/28/09-10/25/09	% Change	WE 10/25/09	% Change	WE 10/25/09	% Change
<b>TOTAL MEAT</b>	<b>862,957,105</b>	<b>+ 8.1%</b>	<b>2,749,422,889</b>	<b>+ 11.3%</b>	<b>11,324,087,261</b>	<b>+ 6.7%</b>
Beef	355,134,781	+ 9.5%	1,144,099,115	+ 11.8%	4,437,605,962	+ 6.6%
Chicken	276,481,098	+ 3.1%	890,760,827	+ 8.3%	3,360,336,422	+ 7.4%
Pork	187,467,547	+ 15.9%	584,506,725	+ 15.5%	2,517,543,852	+ 9.3%
Turkey	33,992,914	- 1.6%	100,330,337	+ 12.6%	875,947,001	- 1.1%
Lamb	3,443,137	+ 12.8%	10,344,523	+ 4.1%	48,461,087	- 5.0%
Veal	1,242,046	+ 15.3%	3,194,116	+ 2.1%	12,727,608	- 9.5%
Other*	5,195,582	- 0.9%	16,187,247	- 1.3%	71,465,330	+ 3.8%

## Average Price/LB

Class	4 WEEKS		13 WEEKS		52 WEEKS	
	09/28/09-10/25/09	% Change	WE 10/25/09	% Change	WE 10/25/09	% Change
<b>TOTAL MEAT</b>	<b>\$2.63</b>	<b>- 8.1%</b>	<b>\$2.70</b>	<b>- 8.6%</b>	<b>\$2.70</b>	<b>- 2.4%</b>
Beef	\$3.38	- 9.3%	\$3.49	- 8.8%	\$3.60	- 2.1%
Chicken	\$1.89	- 3.4%	\$1.92	- 6.6%	\$1.98	- 2.8%
Pork	\$2.30	- 14.5%	\$2.37	- 12.4%	\$2.38	- 4.7%
Turkey	\$2.12	- 0.8%	\$2.14	- 6.8%	\$1.54	+ 3.9%
Lamb	\$5.46	- 7.2%	\$5.64	- 3.2%	\$5.54	+ 4.8%
Veal	\$6.47	- 6.9%	\$6.68	- 4.8%	\$6.91	+ 5.0%
Other*	\$2.63	+ 1.3%	\$2.44	- 0.5%	\$2.42	+ 0.6%

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

Sourced from FreshLook Data – Four Weeks Ending 10/25/09



Funded by The Beef Checkoff

**Total US - Feature Ad Top Line**  
**October 2009**

<b>Ad Count - Total</b>						
	<b>4 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>CLASS</b>	<b>(9/27/09 - 10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>21814</b>	<b>-0.1%</b>	<b>70763</b>	<b>2.9%</b>	<b>286515</b>	<b>2.1%</b>
Beef	9523	1.5%	32070	3.5%	122906	2.3%
Chicken	4963	-0.6%	16237	1.9%	62799	3.1%
Pork	4550	2.6%	14579	3.5%	56589	2.6%
Turkey	1169	-25.8%	3336	-9.2%	17486	-0.2%
Ham	866	3.7%	2516	9.5%	18199	-5.2%
Lamb	430	20.1%	1234	5.4%	5668	-4.8%
Veal	313	28.3%	791	37.8%	2868	61.1%

<b>Ad Count - "A"</b>						
	<b>4 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>Class</b>	<b>(9/27/09 - 10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>9848</b>	<b>0.0%</b>	<b>31271</b>	<b>-0.7%</b>	<b>132326</b>	<b>-0.3%</b>
Beef	4644	-1.5%	15549	-1.8%	62380	-1.7%
Chicken	2172	0.1%	7376	0.5%	28707	4.2%
Pork	2150	10.7%	6434	0.1%	24786	-0.6%
Turkey	522	-31.9%	1088	-13.7%	7168	1.5%
Ham	250	38.1%	573	24.8%	8074	-2.9%
Lamb	68	65.9%	171	50.0%	960	-23.9%
Veal	42	13.5%	80	40.4%	251	54.0%

<b>Ad Share - Total</b>						
	<b>4 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>Class</b>	<b>(9/27/09 - 10/24/09)</b>	<b>Pt Chg</b>	<b>WE (10/24/09)</b>	<b>Pt Chg</b>	<b>WE (10/24/09)</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	43.66%	0.7 Pts	45.32%	0.2 Pts	42.9%	0.1 Pts
Chicken	22.75%	-0.1 Pts	22.95%	-0.2 Pts	21.92%	0.2 Pts
Pork	20.86%	0.5 Pts	20.6%	0.1 Pts	19.75%	0.1 Pts
Turkey	5.36%	-1.9 Pts	4.71%	-0.6 Pts	6.1%	-0.1 Pts
Ham	3.97%	0.1 Pts	3.56%	0.2 Pts	6.35%	-0.5 Pts
Lamb	1.97%	0.3 Pts	1.74%	0.0 Pts	1.98%	-0.1 Pts
Veal	1.43%	0.3 Pts	1.12%	0.3 Pts	1.0%	0.4 Pts

<b>Category Average Advertised Price/LB - Total ( 2 Yrs )*</b>						
	<b>4 WEEKS</b>		<b>13 WEEKS</b>		<b>52 WEEKS</b>	
<b>Class</b>	<b>(9/27/09 - 10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>	<b>WE (10/24/09)</b>	<b>% Chg</b>
<b>TOTAL MEAT</b>	<b>\$3.33</b>	<b>-8.7%</b>	<b>\$3.36</b>	<b>-8.5%</b>	<b>\$3.41</b>	<b>-1.4%</b>
Beef	\$4.28	-9.3%	\$4.30	-9.3%	\$4.47	-2.0%
Chicken	\$2.20	-3.7%	\$2.14	-4.0%	\$2.15	0.7%
Pork	\$2.46	-13.6%	\$2.55	-11.3%	\$2.63	-2.9%
Turkey	\$2.61	2.8%	\$2.62	-2.7%	\$2.35	2.0%
Ham	\$2.56	-21.2%	\$2.65	-17.3%	\$2.59	-0.5%
Lamb	\$5.77	-10.0%	\$5.80	-6.4%	\$5.93	2.7%
Veal	\$6.01	-13.9%	\$6.22	-7.5%	\$6.63	-8.6%

\*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", "Meats and Entrees", "Prepared Meat", and "Sausage, Breakfast"

