Welcome

2010 Cattle Industry Summer Conference
Retail Marketing Committee
July 31, 2010
LONG/SHORT TERM GOALS

Execute the priorities set forth in the Long Range Plan:
by building consumer demand for beef in supermarkets across the USA

Serve as the definitive beef resource to Industry Stakeholders:
i.e. Retailers, State Beef Councils, Packer/Processors & Channel Media

Enhance the value proposition of beef:
through creative marketing campaigns that position beef as a healthy, convenient and affordable protein for today’s consumers

Strengthen beef’s presence against competing proteins:
by maintaining it’s share in feature advertising and in the meat case

Keep beef top of mind with shoppers & consumers:
using innovative advertising, merchandising and marketing programs

Educate operators on beef’s value and contribution to their business:
by building relationships with targeted decision makers

Stretch Checkoff dollar investments by leveraging partnerships:
on promotions that provide purchase incentives for customers
RETAIL MARKETING SUPPORTS

Supermarket Retailers  →  RETAIL MARKETING  →  Channel Media

State Beef Councils  →  RETAIL MARKETING  →  Wholesale Distributors

Packers & Processors  →  RETAIL MARKETING  →  Industry Partners

Other Checkoff Contractors  →  RETAIL MARKETING  →  Other NBCA Program Areas
Tactic 1A : National Promotions and Partnerships

Budget: $875,902
### 2010 Retail Promotional Calendar Update

<table>
<thead>
<tr>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
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<tr>
<td>A1. Steak Sauce In-Store Promotion: Jan - Dec</td>
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<td>Tabasco Big Game Promo: Jan-Apr</td>
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<td>Hefty/Wholly Guac. Big Game: Jan-Apr</td>
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<td>Bud: May</td>
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<td>Bud Hispanic Promo: May-Jul 4</td>
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<td>Snyder's Chip Promo: May-Jul</td>
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<td>Sutter Home Build a Better Burger: May-Aug</td>
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<td>Chi Chi's/La Victoria/Herdez Salsas: May-Sep</td>
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<td>Bud Tailgating Promo: Aug-Oct</td>
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<td>House of Tsang: Sep-Oct</td>
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<td>Holiday Roast: Nov-Dec</td>
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- Twelve partner promotions scheduled in fiscal year 2010
- Nine promotions currently underway or completed
- New holiday roast promotion added since last update in January
Tactic 1A: Measurable Objectives

1. Develop a minimum of six promotions with industry partners within the retail channel. **Completed**

- McIlhenny Company/Tabasco
- Kraft Foods/A.1. Steak Sauce
- Hormel Foods
- Snyder’s of Hanover
- Sutter Home Wines
- Mega Mex Salsas
- Wholly Guacamole
- Anheuser Busch/Budweiser (3 promotions)
- H.J. Heinz/Classico
- Hefty Products

** Twelve industry-partner promotions scheduled with nationally recognized consumer brands in 2010 **
2. Promotion partners will contribute a dollar equivalent investment five times greater (on average) than The Beef Checkoff. Complete

Promotion partner/Beef checkoff ratio exceeds the goal of 10:1

3. Secure at least 50 million incremental merchandising aids and coupons through partnerships. Complete

Over 100 million Beef coupons and rebates provided in 2010
Tactic 1A: Measurable Objectives

5. Execute a minimum of four account-specific promotions with retailers that involve one or more of the following initiatives: Complete

- New beef cuts from Chuck Roll, Round, or Beef Alternative Merchandising (BAM) program
- Hispanic marketing program
- National partner program
- Consumer education or savings program (Slice & Save, Easy Fresh Cooking, or Beef Bargain Bundles)
Account-Specific Retailer Promotions

Checkoff-funded programs such as BAM, SAS, EFC etc. have been adopted by many retailers, including:

- Associated Foods
- Harris Teeter
- Hy-Vee
- Kroger
- Publix
- Sam’s Club
- Save-Mart
- Smart & Final
- Weis Markets
- Winn-Dixie
Tactic 1B: Retail Channel Partner Outreach

Budget: $234,590
Annual Meat Conference & National Grocers Association

AMC- 808 retail industry professionals attended
NGA- 1,323 independent retail industry professionals attended

• Speakers
  – Secured 5 Checkoff presentations for breakout sessions
• Product Sampling & BAM Cutting Demonstration
  – BAM sliders and veal meat balls
• Meat Case Displays highlighting Checkoff Programs
Retail Beef Backer Award

2009 Winners (awarded in 2010)
Independent Category- Sendik’s Food Market- WI
Mid-Size Chain Category- Southern Family Markets- AL
Large Chain Category- Harris Teeter- NC
Innovator of the Year- SUPERVALU- MN

2010 Call for Entries issued in June 2010
State Beef Council Regional Meetings

Two Regional State Beef Council Meetings

• US Foods Stockyards- Phoenix, Arizona
  Tour of Le Cordon Bleu Culinary School
  February 23-25, 2010

• US Foods Stockyards- Charlotte, North Carolina
  March 16-18, 2010

22 participants from 19 State Beef Councils
Tactic 1B: Measurable Objectives

- Inform and engage a minimum of eight (8) retailers at the Annual Meat Conference and/or NGA Convention - Complete - February & March 2010

- Present beef checkoff program initiatives in at least one general session or workshop at the AMC and/or NGA Convention - Complete - February & March 2010

- Solicit retailers to participate in the 2010 Beef Backer Award Program. Award four (4) retailers – Complete - January 2010

- Add a new Retail Beef Backer Award category for mid-sized chains with 12-99 stores - Complete - November 2010

- Conduct a minimum of four (4) BIKE meetings - Complete - May 2010 - Associated Foods, Safeway, Wal-Mart, Kroger and Southern Family Markets

- Conduct two (2) regional meetings to inform State Beef Councils A minimum of two (2) SBCs attending each meeting will use the national program information and tools received to implement at least one national retail program or promotion in one or more of their retail accounts – Complete - Regional Meetings February & March 2010 & numerous national programs have been extended by State Beef Councils

- Conduct a minimum of two (2) conference calls or webinars to update SBCs, and/or Packers on upcoming beef Checkoff promotions and programs - Complete - January 2010
Tactic 1C : Trade Marketing and Communications

Budget: $748,680
Tactic 1C: Measurable Objectives

- Develop and distribute twelve (12) monthly sales and featuring reports to retailers and suppliers. **Completed ten (10) YTD – On Target.**
- Continually monitor and maintain the MeatTrack.com website, and update it a minimum of three (3) times per year. **Completed three (3) Updates.**
- Continue to participate in monthly conference calls and industry meetings regarding product identification and traceability to maintain URMIS standards and provide guidance in the development of North America and International standards for variable measure meat products. Develop and distribute a weekly Wholesale Price Report to retailers and SBCs. **Completed eight (8) conference calls, forty (40) Wholesale Pricing Charts - On Target**
Tactic 1C: Measurable Objectives

- Issue at least three (3) major press releases highlighting beef Checkoff initiatives. **Completed fifteen (15).**
- Conduct at least fifteen (15) trade press interviews that support Checkoff initiatives. **Completed thirteen (13) YTD - On Target**
- Generate at least four (4) million media impressions in the retail trade media. **Completed Currently have generated 5.0 million impressions**
- Develop twelve (12) RBBs containing new beef information and send to the existing distribution list. **Completed ten (10) YTD – On Target**
- Develop four (4) BFFs and email to individuals on the BFF distribution list. **Completed four (4)**
- Develop and disseminate research information from the 2010 National Meat Case Study to retailers, SBCs and packers via executive summaries, press releases, webinars and/or power point presentations. **Executive Summary creation in progress - On Target**
- Conduct two (2) webinars for retailers, packers and SBCs to showcase the new and improved retail marketing website which contains information on all the beef Checkoff retail marketing promotions and programs. **Completed two (2)**
Unique Sends by Category – 2nd Qtr FY10

- Retailer: 430 (57%)
- SBC: 41 (6%)
- NCBA: 10 (1%)
- Other: 79 (11%)

Additional Resources:
- Beef Training Center: Beef for Life
- Consumer Brochures: Making it Safe
- Consumer Resource: Guide to Ground Beef
2nd Quarter FY2010
Category Topics By Pages Viewed

1 Merchandising General is made up of Seasonal Merchandising, Promotional Calendar, Hispanic Merchandising and Veal.
2 Other is made up of Miscellaneous, AMC and Safety Summit Summary
# Wholesale Pricing Update

## Wholesale Pricing Chart: Choice Grade Sub-Primals

### Chuck
- **IMPS/NAMP #:**
- **Description:**
  - 114 A: Chuck Shoulder Roast Trimmed
  - 114 E: Chuck Clod, Oils Roast
  - 116 A: Chuck Ribs
  - 116 B: Chuck Tender

### Rib
- **IMPS/NAMP #:**
- **Description:**
  - 141: Ribeye Ball, Up On Bone In
  - 142: Ribeye Ball, On Bone In
  - 143: Short Plate, Short Ribs, Tenderloin

### Loin
- **IMPS/NAMP #:**
- **Description:**
  - 174: Strip Loin, Bone In
  - 175: Strip Loin, Boneless
  - 176: Top Sirloin Butt, Boneless
  - 177: Bottom Sirloin Butt, Boneless

### Round
- **IMPS/NAMP #:**
- **Description:**
  - 181 A: Round Shank Off, Boneless
  - 181 B: Bottom Sirloin Butt Tip, Boneless
  - 181 C: Bottom Sirloin Butt Tip, Boneless

**Guide:****
- Total weight for each primal includes bone, fat and trim.
- This is a change from the previous which just tracked the value of retail cuts listed.

### Trim/Ground Beef (23% Wt)
- **IMPS/NAMP #:**
- **Description:**
  - 135: 50% Trimmed
  - 136: 100% Ground Beef
  - 137: Coarse Ground Chuck
  - 138: Coarse Ground Sirloin

### Choice/Select Spread
- **Description:**
  - SE Cut
  - CH Cut
  - Spread

*Prices shown are based on USDA weighted average prices from the previous week. Prices reflect average not actual market prices.*

*Prepared on behalf of the Cattleman’s Beef Board by the National Cattlemen’s Beef Association.*

*Funded by The Beef Checkoff*

*Source: CattleFax*
# Retail Performance

## Total US – Fresh Meat Sales

### June 2010

#### Dollars - Total

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

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<th>% Change</th>
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<td>05/24/10-06/27/10</td>
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<td>WE 06/27/10</td>
<td></td>
<td>WE 06/27/10</td>
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<td>TOTAL MEAT</td>
<td>975,731,852</td>
<td>- 2.3 %</td>
<td>2,614,164,664</td>
<td>- 4.1 %</td>
<td>11,343,743,143</td>
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<td>Beef</td>
<td>409,299,559</td>
<td>- 4.6 %</td>
<td>1,057,282,860</td>
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<td>4,438,471,403</td>
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<td>Chicken</td>
<td>329,735,675</td>
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<td>838,998,995</td>
<td>+ 0.2 %</td>
<td>3,395,151,729</td>
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<td>Pork</td>
<td>202,411,752</td>
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<td>602,155,377</td>
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<td>2,517,974,801</td>
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<td>Turkey</td>
<td>23,296,018</td>
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<td>62,197,707</td>
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<td>658,271,075</td>
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<td>Lamb</td>
<td>3,598,070</td>
<td>- 7.5 %</td>
<td>13,741,623</td>
<td>- 10.5 %</td>
<td>48,999,975</td>
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<td>Veal</td>
<td>1,002,955</td>
<td>- 5.4 %</td>
<td>2,903,428</td>
<td>- 1.0 %</td>
<td>12,798,504</td>
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<td>Other*</td>
<td>6,387,823</td>
<td>+ 10.3 %</td>
<td>16,884,873</td>
<td>+ 3.4 %</td>
<td>72,075,656</td>
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# Retail Performance

## Total US - Feature Ad Top Line

**June 2010**

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<th>% Chg</th>
<th>52 WEEKS</th>
<th>% Chg</th>
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<td>25635</td>
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<td>68396</td>
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<td>288588</td>
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<td>Chicken</td>
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<td>15682</td>
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<td>Pork</td>
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<td>Turkey</td>
<td>1179</td>
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<td>3506</td>
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<td>Lamb</td>
<td>451</td>
<td>19.6%</td>
<td>1532</td>
<td>-2.7%</td>
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<td>Veal</td>
<td>240</td>
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<td>720</td>
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<td>2940</td>
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<th>Pt Chg</th>
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<td>0.0 Pts</td>
<td>100.0%</td>
<td>0.0 Pts</td>
<td>100.0%</td>
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<td>Beef</td>
<td>46.25%</td>
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<td>24.17%</td>
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<td>22.29%</td>
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<td>6.12%</td>
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<td>Lamb</td>
<td>1.76%</td>
<td>0.4 Pts</td>
<td>2.24%</td>
<td>0.1 Pts</td>
<td>2.15%</td>
<td>0.1 Pts</td>
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<td>Veal</td>
<td>0.94%</td>
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<td>1.05%</td>
<td>0.0 Pts</td>
<td>1.02%</td>
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Tactic 1D: Retail Education and Meat Case Programs

Budget: $853,490
Slice And Save (SAS)

- Provide consumers with the knowledge to buy middle meat sub-primals (Ribeye, Top Loin, Tenderloin, Top Sirloin, Top Sirloin cap off) in bulk and cut them at home into steaks

- Saves consumers money by purchasing at a lower $/lb and cutting themselves

- Multi-faceted program
  - Videos showing basic cutting techniques
  - On-pack labeling
Smart and Final Slice and Save Promotion Recap

- Joint promotion with Smart & Final, California & Nevada Beef Councils and National Checkoff funds
- 176 stores in CA and NV
- Dates: June 9-22, 2010
- Promotion elements
  - 2 week radio promotion utilizing BIWFD radio spots & 4 live remotes
  - Increased beef featuring in weekly ad
  - Slice & Save consumer brochures and labels displayed in store
  - Bonus: Web banner & register screen graphics
Beef Alternative Merchandising (BAM)

All program details are available at [www.beefretail.org](http://www.beefretail.org)
- URMIS descriptions & approved PLU numbers
- Cutting Charts
- Recipes
- Fresh Cuts and Beef Meal Photography
- On Line Narrated How to Videos
- Training Manual for Retailers
Tactic 1D: Measurable Objectives

- Conduct a minimum of 40 face to face meetings with retailers and 2 webinars. **Completed** - Over 45 face to face visits to date, have conducted 2 webinars with SBCs to review the new website, we are on target to complete and exceed.

- Present the Chuck Roll Cuts, Beef Round Cuts, BAM, SAS, Beef Bargain Bundles to a minimum of 10 retail accounts and support state beef councils in introducing the program to their retailers. **Completed** - BAM and Slice and Save on line videos and have had over 8,000 viewings since they have been posted, Chuck Roll and Round Cuts are ongoing with retail and packers.

- Present the Hispanic Marketing program information to a minimum of 10 retailers and support state beef councils in introducing the program to their retailers. **Completed** - Dillons pilot study complete and they are rolling it out to all of their Hispanic stores. Results have shown significant increases in thin beef movement.
Iowa Beef Industry Council Initiatives
Meat Case Innovation Initiative (MCII) Advisory Council Members
MCII Goals

- To identify and resolve issues consumers have with shopping the supermarket meat case
- To identify and resolve issues consumers have with shopping for beef at the meat case
- To identify and resolve issues regarding meat operations that will impact long-term viability of the meat department
- Use the learnings from this project to build demand for beef by positioning it as a safe, nutritious, healthy, convenient, affordable protein for today’s consumer
URMIS Translations to Spanish

Translation of Top 200 cuts into Spanish

URMIS Background

• Established in 1973 by the industry-wide Cooperative Meat Identification Standards Committee
• Developed to simply and standardize the array of fresh meat cuts and their names

Retailer Benefits of URMIS:

• Provides a retail meat identification system
• Provides a standardized nomenclature for every cut
• Helps eliminate consumer confusion caused by the proliferation of names
• Provides a standard for labeling meats that is uniform throughout the industry
• Beef, Pork, Lamb and Veal ties back to the NAMP/IMPS system
• Recognized by the industry, USDA and other regulatory agencies
The Hispanic Opportunity: Hispanics are the largest ethnic group in the nation

- **44.3 million** strong and growing **three times faster** than the total population

### Hispanics have Larger Families
4.0 Hispanics per HH vs. 2.6 for general market

### Have More Kids
57% of all Hispanic households vs. 33% Non-Hispanic households

### Spend More on Groceries
$133 per week vs. $91 for general market

### Spend More on Beef
- 42% more than non Hispanics
  - $326 for Hispanics annually by individual consumer vs. $230 for general market

Sources: 2006 U.S. Census Bureau; Nielsen Media Research 2005 Universe Estimates; 2005 FMI El Mercado Study
Tested POS elements in 3 Dillons stores
- Wichita, KS
- Garden City, KS
- Liberal, KS

Test was 12 weeks, July – November, 2009

Evaluated through
- Consumer Intercepts
- Sales Data
- Retailer Survey
Elements of Program

Merchandising Materials:
• Shopper Brochure (Dictionary of Cuts)
• Hispanic Cut/Dish Chart
• Channel Strips,
• Counter Posters,
• On-Pack Recipes
• Theatre floor sign
• Employee button

Case/Product Fundamentals:
• Foundational Hispanic cuts were merchandised and displayed (cut list and meat case schematic options were provided to each store)
• Hispanic “Section” was maintained
• RUMBA offal line of products was also launched at the beginning of the test
Customer Intercepts

• Overview
  • Conducted pre-wave interviews in 3 test stores
  • Conducted post-wave interviews in same 3 test and 3 control stores after programs was in place for 12 weeks
  • Respondents were active shoppers in the meat department and spent adequate time in the department prior to intercepting, to allow POS and cuts to be noticed.
  • They were further screened for study qualifications:
    • Self-identified Hispanic/Latino, Spanish-dominant language or bilingual
    • Primary or joint household grocery shopper and meal preparer
    • Male or female (maximum of 10% males)
    • 21-54 years of age
    • Household income of at least $25K
    • Cooks beef at home at least 2 times/week, and purchases beef at least 4 times/month
    • Has at least one child under 18 years living at home (minimum of 90%).

• Summary of Results
  • Strong increase seen in beef shopping frequency, and beef packages per trip
Insight #1 – Beef Purchasing and Use Reported to Have Increased

• Test Store traffic increased as did visits to the beef section of the meat department.

• Grocery shopping trips increased from 8.2 trips per month to 11.1 trips per month

• Of those trips, shopping for beef during a grocery trip increased by 2 trips per month (from 5.6 to 7.8).

• The average number of beef packages purchased on a single visit increased as well, from 2.7 packages to 3.2 packages per trip.
Insight #2 – Dillons Bond Strong with Longer-Term Hispanic Customers

- Meat Department Rating for Fulfilling Shopper’s Needs continues strong with “base shoppers” (shopped at Dillons 1 year or more)

- Shoppers preference as Dillons for their place to buy beef and as preferred location for buying ground beef remained extremely high
Pilot Test Results - Sales

Test stores achieved significant volume sales increases in the below categories:

- Rounds - 35.3% increase
- Chucks - 60.1% increase
- Ribs - 26.9% increase
- Loins - 41.7% increase
- Offals - 82.7% increase

Source: Store data
FY 2010 AR Program Budget $2,712,662
FY 2010 Supplemental AR $ 100,000
FY 2010 Total Budget $2,812,662
FY 2011 AR Program Budget $2,487,000
FY 2011 Budget Reduction $ 325,662
FY 2011 Budget Reduction 11.6%
FY 2010 / 2011
Retail Marketing - Program Changes

- Fewer National Partnership Promotions will be executed
- Increased emphasis on 3 Major Campaigns
- New Program developed around LEAN BEEF
- Fewer Purchase Incentives for beef in the channel
- Fewer Press Releases, Interviews and Media Impressions
- Fewer BIKE meetings
- Fewer SBC Regional Meetings
- Formation of a SBC Advisory Council
- New Module added to Beef Training Camp
- American Heart Association Certification for four cuts
- No new Hispanic Marketing Materials
- Long Range Plan
  - Thought Leader Survey
    - NCBA Strategy Teams
      - Retail Marketing Committee
        - CBB/Federation Leadership
          - MCII Advisory Group
            - SBC Program Managers
Five Tactics used to execute the strategy

1. **Stimulate Short Term Sales for Beef**
   - Promotions - Tactic 1A

2. **Build Long Term Demand for Beef**
   - Programs – Tactic 1B

3. **Position Beef as The #1 Protein in the Channel**
   - Communications and Public Relations – Tactic 1C

4. **Monitor and Report on Beef’s Performance**
   - Beef Intelligence - Tactic 1D

5. **Engage our Key Accounts to Take Action**
   - Partner Outreach – Tactic 1E
Stimulate short-term sales: Embrace the opportunities

• Offer purchase incentives to buy beef
  – Primarily through dollar-off coupons and mail-in rebates

• Leverage the checkoff investment with CPG partners
  – Through six (6) CPG partnerships that extend the checkoff dollar

• Drive incremental sales for beef with retailer partners
  – Four (4) account-specific promotions

• Advance beef’s key initiatives in the marketplace
  – Utilizing seasonal campaigns such as I Heart Beef, Summer Grilling and Holiday Roast
Tactic 1B
Retail Education and Meat Case Programs
$400,000

Build long-term demand: Address the challenges

• Position beef more favorably against competing proteins
  – Hispanic Marketing, Beef Value Cuts and Beef Made Easy

• Educate the public on how to prepare and cook beef
  – Easy Fresh Cooking and Beef Training Camp

• Maintain industry standards to reduce consumer confusion
  – Uniform Retail Meat Identity Standards

• Develop programs that make it easier for consumers to make beef their protein of choice
  – Beef Alternative Merchandising, Slice and Save, Bargain Beef Bundles and On-Pack Nutritional Labeling
Serve as “the beef resource”: Position beef favorably

- Work with major trade publications to keep beef positioned in a favorable light
  - *Supermarket News, Meatingplace and Meat & Poultry*
- Provide accurate and factual data to reporters
  - *Deskside Interviews, Press Releases and Interviews*
- Develop monthly e-newsletters to keep beef top-of-mind with retailers and showcase beef’s positive attributes
  - *Retail Beef Blast and Beef Fast Facts*
- Establish the beef checkoff’s Retail Marketing Program as the marketing resource for all things beef
  - *BeefRetail.org website*
Monitor beef’s performance: Track channel indicators

- Track primary indicators to monitor YOY performance
  - Dollar sales, pound sales, feature ads and market share

- Measure beef’s performance against competing proteins
  - Meat Solutions, Freshlook and Promodata

- Determine beef’s contribution to the meat department/store
  - Beef Training Camp Module

- Identify trends at the meat case
  - National Meat Case Study

- Utilize information to improve beef’s position in the channel
Engage key accounts: Maintain beef’s market share

- Develop relationships with targeted retail accounts
  - Top 50 Supermarket Retailers
- Maintain a strong presence at industry events & trade shows
  - Annual Meat Conference and National Grocers Association
- Recognize those retailers that do an outstanding job
  - Beef Backer Award program
- Work with SBCs to extend national programs & promotions
  - SBC Regional Meeting and SBC Advisory Council
- Engage retail industry thought leaders and influencers
  - Meat Case Innovation Initiative (MCII)
Attachment A: Tactic 1E
National Promotions and Partnerships

Budget: $400,000
Measurable Objectives

• Drive incremental beef purchases in the retail channel by conducting four (4) additional partnership promotions.
  ► Enhance beef’s affordability by providing consumers with an additional 70,000,000 coupons/rebates for money-off their beef purchases

• Leverage the checkoff investment by working with national partners who will contribute a dollar equivalent investment that’s at least ten (10) times greater than the beef checkoff investment.
  ► This lift allows for added exposure of beef’s overall presence in the channel and keeps beef top-of-mind with consumers.
- Addition of four new partnership opportunities to round out year-long coverage in the channel (green)
- Opportunity to expand beef promotions during non-peak times to build and maintain momentum
- Additional beef recipes and consumer purchase incentives for beef in the channel
- Opportunity to partner with family-oriented iconic brands to position beef as healthy and nutritious
Early Estimates on Deliverables

- 70 million FSIs with beef images distributed in top markets
- Over 40 million additional coupons and rebates to entice consumers to purchase beef and enhance its affordability
- Additional 70,000 displays and POS graphics in the retail channel with Beef Checkoff logo
- Over 75 million additional Beef Checkoff recipes distributed to consumers
Attachment A: Tactic 1G
Hispanic Marketing

Budget: $200,000
Hispanic Marketing

Develop 10 more Hispanic Recipe labels with Photography
Hispanic Marketing

Add one additional marketing piece to the Hispanic POS kit.
Hispanic Marketing

- Translate 4 of the Beef Training camp modules to Spanish

Steak

Hispanic Marketing

Recipe Ready Beef

Beef For Grilling

Beef For The Holidays
• Produce Spanish Language Slice and Save videos to correspond with bilingual labels.

<table>
<thead>
<tr>
<th>BONELESS BEEF BOTTOM ROUND</th>
<th>CONTRACARA DESHUESADA</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEAKS</td>
<td>BISTECES</td>
</tr>
<tr>
<td>With a SHARP KNIFE cut Bottom Round Steaks (to desired thickness) from B to C.</td>
<td>Con un CUCHILLO FILOSO, cortar los bisteces de contracara (del grosor deseado) desde la B a la C.</td>
</tr>
<tr>
<td>ROASTS</td>
<td>ASADOS DE RES</td>
</tr>
<tr>
<td>A. Beef for stewing or roasting D. Rump Roast</td>
<td>A. Carne para estofados o asados D. Cuadril de res para asado</td>
</tr>
<tr>
<td>To section for roasts and steaks, place on a cutting board flat side down. Hold firmly and with a sharp knife, cut using sharp, clean strokes. Avoid “sawing” motion with the knife. Cut across the grain of the meat preparing steaks no thicker than one inch. Marinate overnight with your choice of marinade. The Beef Bottom Round may also be roasted whole.</td>
<td>Para seccionar asados de res o bisteces, colocarla sobre una tabla de cortar orientando el lado plano hacia abajo. Sostener con firmeza y con un cuchillo filoso cortar con movimientos parejos y bien definidos. Evitar “serruchar” con el cuchillo. Realizar cortes transversales, preparando bisteces de no más de 1 pulgada de grosor. Marinat toda la noche con el marinado de su preferencia. La contracara también se puede asar entera.</td>
</tr>
</tbody>
</table>
Thank You