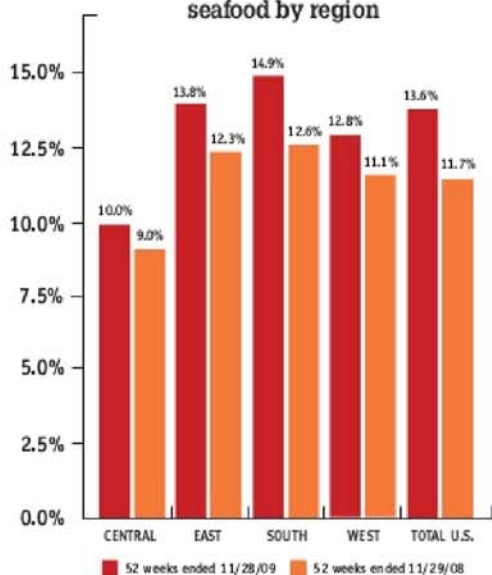


Crustaceans average weekly dollar sales per store by region



Crustaceans average weekly contribution to total seafood by region



Crustaceans

Impressive lobster sales push the entire category higher. BY KIM GAWRONSKI

WHILE IT HAS BEEN WELL DOCUMENTED that consumers are eating out less over the past year, they want to replicate the restaurant experience when preparing meals at home. During this period, lobster prices fell to record lows amid bumper supply, providing more opportunity for consumers to purchase lobsters.

The crustaceans category, which excludes shrimp, posted the highest dollar sales increase in the seafood department. Average crustacean sales increased \$147 (21.8%) per store per week to \$826 during the 52-week period ended Nov. 28. Crustaceans' contribution to total seafood department sales averaged 13.6% during the time frame, an increase from 11.7% the previous period. The crustaceans category encompasses the subcategories of crab, crabmeat, lobster and other crustaceans, which includes crawfish. The crab subcategory represented the largest portion of all dollar sales with 56.7% share for this period. Lobster had the second largest dollar share of 29.1% in the total U.S. Crabmeat held 12.8% of the category's dollar share while other crustaceans contributed 1.4% to the category.

Crustaceans' dollar sales rose above average during the past year for traditional holidays, as well as the entire month of June and the Fourth of July period. Crustaceans' sales spiked the first week of August, then again during Labor Day weekend, concluding with above-average sales for this 52-week

period. January and October dollar sales for the category were lower than average.

Lobster's performance was most impressive compared the other subcategories, with a 47.9% increase in dollars per store per week compared to last year. Average weekly per-store dollar sales for lobster surpassed crab sales for both New Year's and Valentine's Day, with \$937 and \$532 respectively; crab dollar sales for those two holidays were \$921 and \$476 per store per week, respectively. The lobster subcategory also had sales spikes in the month of March, where the previous year's sales were flat for that period. Crab weekly dollar sales were the highest during the week of January 3, 2009, with \$921 per store, and increased overall 14.1% in dollars per store per week. Crabmeat's major dollar sales peak was the week of Dec. 27, 2008, with \$303 per store per week, an increase of 10.9%.

Crustaceans' sales were greatest in the East at \$1,404 per store per week, up 17.1% compared to the previous 52-week period. The region outperformed the national average by \$578. Crabmeat, lobster and crab posted positive sales changes compared to the previous year, up 19.3%, 19.2% and 13.9% respectively. Lobster had 47.8% of the category dollar share in the East. Overall, crustaceans' sales in the East accounted for 13.8% of all seafood sales, an increase from last year.

The South sold the next highest amount at \$790 per store per week, up 26.3% versus the previous year — the highest increase of all the regions. The region posted sale increases in all of the subcategories. Lobster had the most

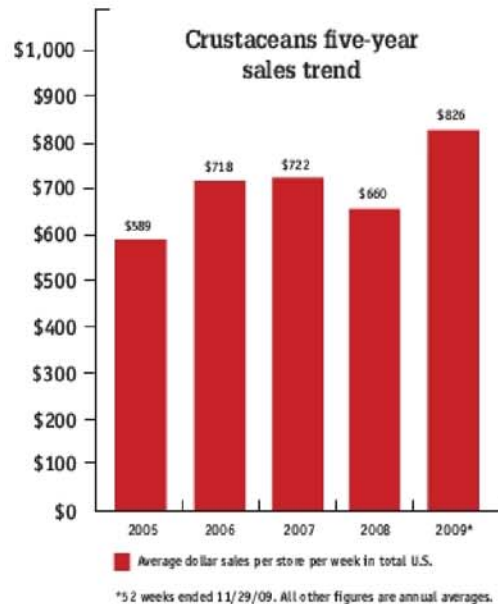
significant growth, up 64.5% in dollars per store per week. The crab, other crustaceans and crabmeat subcategories also increased dollar sales by 25.3%, 17.5% and 8.6% respectively. Crustacean sales in the South region accounted for 14.9% of total seafood sales, an increase of 2.3 percentage points over the previous year.

The West region sold crustaceans at an average of \$642 per store per week, an increase of 23.1% versus a year ago, despite the fact that only two of the four subcategories posted positive dollar sales. Lobster led dollar growth in this region, up 173.0%, followed by other crustaceans, which increased 3.3% compared to last year. Crabmeat and crab posted sales decreases of 7.0% and 1.0% respectively. Crab sales decrease had the largest impact

on the region, as crab maintained 63.8% of the category dollar share. The crustacean category's total contribution to department in the West region was 12.8%.

The Central region sold the least crustaceans with \$535 per store per week, an increase of 14.0%. Lobster increased the most, up 43.5%, and other crustaceans increased 25.3%. Crabmeat and crab dollar sales percentages increased 6.8% and 5.9% respectively.

Although the crab subcategory had the smallest dollar increase, the subcategory had an important effect in the Central region due to its higher category dollar share of 66.1% in total. Total crustaceans' sales in the Central region represented 10.0% of seafood sales, up one full percentage point from last year. □



This sales review is provided by Chicago-based Perishables Group, Inc., an independent consulting firm focused on innovation and creating value for clients in the fresh food industry. Reported results are for December 6, 2008,

through November 28, 2009, representing approximately 62% of national supermarket ACV share. For more information, contact Perishables Group's Kelli Beckel at 773-929-7013 or KelliB@perishablegroup.com.

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Sea Cuisine High Liner

High Liner Foods USA introduced the High Liner Sea

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May 19-21, 2009: NCA's All Candy Expo
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