

# 2007 Meat Snacks Category



**POWER  
HUNGRY  
FOODS**



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HUNGRY  
FOODS**

# Preface

The purpose of this document is to present the detailed findings, conclusions and implications of a comprehensive 2007 Review of the Meat Snacks Category for the express purpose of educating the procurement field about how and where innovative items should flourish and ultimately expand the category by true independent volume growth. (#3)

The objectives of the Review are as follows . . . with special notation to the Bold

1. To identify significant sales trends involving the Total Meat Snacks Category and each of its major segments.
2. To examine important brand share performances within each major segment.
3. **To spot new product/line extension and line rationalization opportunities.**
4. **To reinforce our category expertise with our customers, as a major point-of-difference versus our competitors.**
5. To serve as a key source for developing and implementing high-impact, fact-based sales presentations.
6. To identify by individual region the level of market development of the Total Meat Snacks Category and Major Product Segments.

# Methodology

The Review is based on sales scan data purchased from Information Resources, Inc. (IRI), one of two major providers of syndicated sales data for the retail food industry (the other being A.C. Nielsen).

Important elements of the sales data include the following:

- Time Period:** 52-weeks for the period ending August 12, 2007 and the same period of the prior year.
- Classes of Trade:** **Food** (supermarkets and grocery stores, excluding Wal-Mart), **Mass Merchandisers** (excluding Wal-Mart), **Drug Stores** and **C-Stores**.
- Markets:** Total U.S. and the seven (7) IRI regions.
- Measurements:** Dollar and Unit Sales, ACV Distribution (All Commodity Volume), Sales Per point of ACV Distribution and Sales Per \$MM ACV and Average Non-Promoted Unit Price.
- Items:** All Meat Snack items and segments sold in the past two years.
- Segments:** Beef Jerky, Beef Sticks, Snack Sticks, Beef & Cheese, Sausage and All Other



# Potential Applications

These data and the ensuing analyses can be used for a multitude of action-oriented purposes designed to establish PHF as the “Category Expert” in the eyes of our customers. These applications include, but are not limited to, the following:

- To provide fact-based rationale for new item and shelf set recommendations made to our customers.
- To complement customer-specific business reviews.
- To foster customer relationships by assisting the buyers/category managers we interact with to become smarter about their businesses.
- To serve as an incentive for customers to grant us appointments.

In essence, what we really want is to be distinguished from our competition. We want to have a meaningful point-of-difference which can assist us in building our business. New and innovative ideation has placed us in this “preferred” category expansion position





2007 Meat Snacks Category Review  
Executive Summary  
Total Food, Drug and Mass Merchandise

# Meat Snacks Executive Summary – Food, Mass and Drug

- Following several years of sales growth, Meat Snacks dollar sales in the Food/Mass/Drug classes of trade declined by -3.1% for the year, from \$320.9 million to \$311.1million.

**Implications:** a significant growth opportunity for PHF, is penetration into these channels which may become increasingly difficult as category growth has become far less leverageable in our selling efforts. Meat Snacks distribution has reached record levels, but retailer support in the form of merchandising/promotion activity remains at very low levels relative to other snack categories.

- The Meat Snacks Category continues to be highly competitive/fragmented (209 brands and 1,932 varieties), resulting in relatively little brand loyalty.

**Implication:** It is essential that PHF expresses a meaningful reason-for-being with both the trade and consumer to affect distribution gains. In view of a historic lack of consumer brand loyalty, it is maintained that the most viable means toward accomplishing this is through an effective “*New to the world*” positioning employing both the angle of an expanded new profile and Powerfully suggestive New Branding.

Intrinsic to a successful New-brand / New Category positioning is the following:

- ✓ **Premium retail price advantage** versus leading national brands (+30 – 50%).
- ✓ **Greater profit margin** and at least the same penny profit for the retailer versus the leading national brands.
- ✓ **Product quality** that is as good or better than the leading national brands, with the added promise of an Energy Boost as the key selling pull-through!.

# Meat Snacks Executive Summary – Food, Mass and Drug

- Jack Links has become the # 1. brand in Food/Mass/Drug channels with a 23.8% share, passing Oberto with a 22.7% share, despite the strength of the Lays strategic alliance.

**Implications:** Jack Links marketing programs (i.e., product innovation, advertising, value-added packaging, consumer promotion, etc.) epitomize how a category leader should perform. The strength of Oberto and Jack Links trade equity makes it extremely difficult for PHF to directly compete with these two brands in the Food/Mass/Drug channels without a solid reason-for-being. It is believed that this reason-for-being should be for PHF's product lines to serve as the cutting edge "New to the World" Energy Category dedicated to expand sales via incremental purchases vs Oberto and/or Jack Links, and now also **designed to significantly build category sales and profits.**

- **New and Other Product Segment was up by 76.9%,**

**Implication:** A category expansion strategy involving Lightning Rods and Power Hungry Foods is targeted to be the most effective and efficient means toward gaining new retail distribution; however, programs must be developed and implemented to obtain retailer merchandising and promotional support of the new brand recognition to build consumer awareness and trial vis-à-vis national brands. Gaining distribution and shelf face is only part of the equation in obtaining consumer acceptance. **The concept of Energy as a snack** is vital with an on-pack Brand awareness campaign

- **Beef Jerky (64%) and Snack/Beef Sticks (16%) account for 80% of category sales.**

**Implication:** A focused strategy and launch should be on just these two segments in the Food/Mass/Drug classes of trade. The dollar sales and ACV distribution of the remaining segments do not represent a large enough business-building opportunity.

**Single serve sticks and their one portion portability** make them the prime format style.





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2007 Meat Snacks Category Review  
Executive Summary  
Total C-Stores



# Meat Snacks Executive Summary – C-Stores

- Meat Snacks dollar sales in C-Stores are nearly three times greater than in Food/Mass/Drug outlets (\$915 million versus \$311 million) . . . Meat Snacks rank 4<sup>th</sup> in retail sales among all snack items in C-Stores . . . Finally, Meat Snacks dollar sales continue to grow in C-Stores (+15.3%), while declining (-3.1%) in the Food/Mass/drug channels.

**Implication:** C-Stores should constitute the core market for PHF Energy Meat Snacks, while Food/Mass/Drug outlets should be pursued opportunistically.

- The Meat Snacks Category is highly fragmented and competitive - there are innumerable brands (236) and varieties (2,341) vying for C-Store shelf space. However, NONE are so “New to the World” nor promissory of Energy to date!

**Implication:** As with Food/Mass/Drug channels, PHF must have a positioning that is unique, meaningful and compelling to the C-store operator. Again, it is believed that the most viable positioning for PHF brand consists of serving as an alternative to the leading national brands, specifically Jack Links and Slim Jim, with the featured benefit of an energy boost.

- Jack Links 2007 performance (+27.5% dollar sales increase and share growth of 3.8 points to 40%) once again reinforced their position as the premier category leader . . . They continued to place their marketing investments against the Meat Snacks consumer as opposed to the trade, including, but not limited to, new packaging graphics, innovative line extensions/new products and advertising investments.

**Implication:** Jack Link's will continue to concentrate on increasing share and building category consumption through consumer initiatives, since they already have a very solid retail distribution base. They are not interested in competing on price; in fact, they need price to help fund their consumer investments, which Lightning Rods will mirror!

# Meat Snacks Executive Summary – C-Stores

Therefore, in the segments where they are dominant, PHF's **Energy-brand positioning** (via Lightning Rods and others) should be targeted against Jack Links. Offering an Energy-packed upscale and contemporary alternative to Jack Links enables PHF to have a relevant reason-for-being with the trade. Versus Jack Links, this requires **(1) a meaningful retail price relationship; (2) a greater profit margin and at least the same penny profit for the retailer; and, (3) product quality that is as good or better.**

- **Slim Jim (with a total Meat Snacks Share of 19.4%, down -1.5 points for the year) is typically dominant in the segments where Jack Link's is not (i.e., Snack Sticks).**

**Implication:** PHF's Energy-brand positioning should be aimed at Slim Jim in these segments, applying the same principles as the Energy-positioning targeted at Jack Links.

- **Private Label still does not have a meaningful presence in C-Stores.**

**Implication:** **Energy Meat Sticks** in C-Stores offers PHF a huge business-building opportunity. This is where strategic concentration should be placed, leveraging the success of the similar model of drink and water enhancement programs. A well thought-out, comprehensive plan should be formulated and executed aimed at pursuing the more reputable, well-run C-Store chains that have huge and dedicated Energy sections already in place (i.e.: Juice drinks, water, protein snack, coffee, etc.).

- **The retail sales of all the segments of the Meat Snacks Category in C-Stores justify a full bore assault with Energy branding – dollar sales range from a low of \$41 million in the Sausage Segment to a high of \$376 million in the Beef Jerky segment.**



# Meat Snacks Executive Summary – C-Stores

**Implication:** PHF's full-line capability should be fully leveraged in the implementation of an ENHANCED MEAT SNACK positioning, featuring Energy as the first exciting entrant

- Jack Links is the # 1. Beef Jerky brand with a 46.4% dollar share and 42% ACV distribution level . . . Also, Jack Links is demonstrating the greatest sales growth(+32.5% dollar sales increase or 8.2 share points) of the major Beef Jerky brands.

**Implication:** Jack Links should serve as the benchmark for Beef Jerky in brand strategy, in terms of quality, price and packaging. PHF should consider this factor if wanting to enter this category.

- Beef Jerky small sizes (2.9 oz./less) represent a major player in the Beef Jerky Segment (41% of unit sales), while large sizes are not a factor.

**Implication:** Brand positioning for the Beef Jerky Segment must include small as well as medium sizes. Large sizes (5 oz.+) need not be part of the strategy.

- There are a number of relatively new Beef Jerky flavors that have significantly impacted category growth.

**Implication:** Based primarily on their relatively high sales rates, new flavors that have considered in C-Stores include: *Hickory Smoked, Sweet & Hot, Jalapeno, Steak Sauce* and *Hot Sauce*. Nothing is as cutting edge as energy enhanced profiles and will evoke many open doors of distribution and consumer interest.

- Slim Jim continues to be the dominant brand in the Snacks Sticks Segment with over an 80% dollar share.

# Meat Snacks Executive Summary – C-Stores

**Implication:** An Energy Profile (ie: Lightning Rods) should be dedicated to the Snack Sticks segment should be targeted at Slim Jim.

- Slim Jim's introduction of 1.94 oz. Monster Sticks has been relatively successful (as evidenced by +3 incremental share points in just seven months); in fact, if ACV distribution of the two Monster Sticks flavors grows to the same levels as the Giant size (from 24% on Regular and 18% on Tabasco to 77% and 61%, respectively) Monster Sticks will evolve into a \$25 million business, translating to a segment share of 17%.

**Implication:** Consumers are willing to try differing types and sizes with higher rings not so imposing! However, it be noted: the SJ branding helps support the trial.

- In addition to Beef Jerky (46.4% share), Jack Links has gained the # 1. spot in the Beef Sticks (45.0% share) and Beef Steak (82.6%) segments, largely due to ongoing retail distribution gains.

**Implication:** Jack Links should be the benchmark for a PHF Enhanced Meat Stick brand strategy in all of these segments.





## National Meat Snacks Line and Retail Pricing

# Brand Meat Snacks Line

To follow is what has been categorized as the **-Brand Meat Snacks Line**. Recommended variety assortment is based on (a) **overall sales potential** and (b) the **designated brand benchmark** for each major product segment.

The recommended items incorporated into the line represent \$823 million in retail sales potential or nearly 70% of Total Category sales for Food/Mass/Drug and C-Store outlets combined (\$1.2 billion).

Sizes such as the traditional 0.95oz regular/spicy Smoked Snacks are recommended to be a focus of the line, because of Slim Jim's success with their "standard" Smoked Snacks now with retails over the \$1.00 barrier. Diameter and length in a good mix will add consumer appeal and suggested value benefit.



# Brand Meat Snacks Line

## BRAND MEAT SNACKS LINE

ITEM	DOLLAR SALES (MILLIONS)				
	BRAND BENCHMARK	FOOD, MASS & DRUG	C-STORES	TOTAL	% SEGMENT
0.28 OZ. REGULAR SPICY SMOKED SNACKS	SLIM JIM	\$0.2	\$3.6	\$3.8	1.9%
0.97 OZ. REGULAR SPICY SMOKED SNACKS	SLIM JIM	\$15.1	\$69.2	\$84.3	42.8%
0.97 OZ. MILD SPICY SMOKED SNACKS	SLIM JIM	\$1.4	\$18.9	\$20.3	10.3%
0.97 OZ. HOT SPICY SMOKED SNACKS	SLIM JIM	\$1.6	\$23.7	\$25.3	12.8%
0.97 OZ. NACHO SPICY SMOKED SNACKS	SLIM JIM	\$0.3	\$12.3	\$12.6	6.4%
5 OZ. 15-CT. SPICY REGULAR SNACK STICKS	SLIM JIM	\$10.7	\$0.5	\$11.2	5.7%
1.94 OZ. REGULAR SPICY SMOKED SNACKS	SLIM JIM	\$0.9	\$18.3	\$19.2	9.7%
<b>TOTAL SNACK STICKS SEGMENT</b>	<b>SLIM JIM</b>	<b>\$29.3</b>	<b>\$146.5</b>	<b>\$176.7</b>	<b>89.6%</b>
1.8 OZ. REGUAR BEEF STICKS	JACK LINKS	\$1.6	\$21.3	\$22.9	43.1%
1.8 OZ. TERIYAKI BEEF STICKS	JACK LINKS	\$0.3	\$7.9	\$8.2	15.4%
1.8 OZ. PEPPERONI BEEF STICKS	JACK LINKS	\$0.9	\$6.4	\$7.3	13.7%
<b>TOTAL BEEF STICKS SEGMENT</b>	<b>JACK LINKS</b>	<b>\$2.8</b>	<b>\$35.6</b>	<b>\$38.4</b>	<b>72.3%</b>
3.65 OZ. REGULAR Beef Jerky	JACK LINKS	\$70.9	\$84.8	\$155.7	27.0%
3.65 OZ. TERIYAKI Beef Jerky	JACK LINKS	\$41.2	\$55.2	\$96.4	16.7%
3.65 OZ. PEPPERED Beef Jerky	JACK LINKS	\$25.8	\$50.5	\$76.3	13.2%
3.65 OZ. HICKORY Beef Jerky	JACK LINKS	\$13.6	\$21.2	\$34.8	6.0%
3.65 OZ. BARBECUE Beef Jerky	JACK LINKS	\$5.2	\$14.6	\$19.8	3.4%
1.8 OZ. SIZE REGULAR Beef Jerky	JACK LINKS	\$3.3	\$30.9	\$34.2	5.9%
1.8 OZ. SIZE TERIYAKI Beef Jerky	JACK LINKS	\$1.7	\$21.1	\$22.8	3.9%
1.8 OZ. SIZE PEPPERED Beef Jerky	JACK LINKS	\$0.4	\$12.6	\$13.0	2.3%
<b>TOTAL Beef Jerky SEGMENT</b>	<b>JACK LINKS</b>	<b>\$162.1</b>	<b>\$290.9</b>	<b>\$453.0</b>	<b>78.5%</b>

# Brand Meat Snacks Line

## BRAND MEAT SNACKS LINE (continued)

ITEM	DOLLAR SALES (MILLIONS)				
	BRAND BENCHMARK	FOOD, MASS & DRUG	C-STORES	TOTAL	% SEGMENT
1.6 OZ. REGULAR BEEF & CHEESE	JACK LINKS	\$2.4	\$36.2	\$38.6	66.0%
1.6 OZ. PEPPERONI BEEF & CHEESE	JACK LINKS	\$0.3	\$5.7	\$6.0	10.3%
<b>TOTAL BEEF &amp; CHEESE SEGMENT</b>	<b>JACK LINKS</b>	<b>\$2.7</b>	<b>\$41.9</b>	<b>\$44.6</b>	<b>76.2%</b>
1 OZ. REGULAR BEEF STEAK	JACK LINKS	\$0.5	\$17.1	\$17.6	16.8%
1 OZ. TERIYAKI BEEF STEAK	JACK LINKS	\$0.6	\$15.1	\$15.7	15.0%
1 OZ. PEPPERED BEEF STEAK	JACK LINKS	\$0.3	\$9.8	\$10.1	9.6%
2 OZ. REGULAR BEEF STEAK	JACK LINKS	\$0.5	\$14.1	\$14.6	13.9%
2 OZ. TERIYAKI BEEF STEAK	JACK LINKS	\$0.6	\$13.8	\$14.4	13.7%
2 OZ. PEPPERED BEEF STEAK	JACK LINKS	\$0.3	\$10.4	\$10.7	10.2%
<b>TOTAL BEEF STEAK SEGMENT</b>	<b>JACK LINKS</b>	<b>\$2.8</b>	<b>\$80.3</b>	<b>\$83.1</b>	<b>79.3%</b>
0.875 OZ. HOT SAUSAGE	PENROSE (FIRE CRACKER)	\$0.1	\$4.6	\$4.7	9.0%
1.7 OZ. HOT SAUSAGE	PENROSE (FIRE CRACKER)	\$0.4	\$10.9	\$11.3	21.7%
2.4 OZ. HOT SAUSAGE	PENROSE (TIJUANA MAMA)	\$0.6	\$10.6	\$11.2	21.5%
<b>TOTAL SAUSAGE SEGMENT</b>	<b>PENROSE</b>	<b>\$1.1</b>	<b>\$26.1</b>	<b>\$27.2</b>	<b>52.2%</b>
<b>GRAND TOTAL (TOTAL MEAT SNACKS)</b>		<b>\$201.7</b>	<b>\$621.3</b>	<b>\$823.0</b>	<b>67.2%</b>



# Recommended Brand Retail Pricing

Recommended brand pricing is found on the next page for the optimal meat snacks line. It is believed that in order to have an evolving Premium (Enhanced) brand positioning, the retail price differential versus the brand benchmark must be meaningful to the meat snacks consumer . . . at least +25%, which is the norm for ungraded programs.

Furthermore, along with a +25% price differential, the gross profit realized by retailer must be the same or greater than what is generated by the brand benchmark.



# Recommended Enhanced-to-Brand Retail Pricing

## Enhanced Brand Retail Pricing Recommended Differentials Versus Brand Benchmark

ITEM	BRAND BENCHMARK	FOOD, MASS & DRUG			C-STORES		
		BRAND BENCHMARK	PHFs BRAND	% DIFFERENCE	BRAND BENCHMARK	PHFs BRAND	% DIFFERENCE
0.28 OZ. SPICY SMOKED SNACKS	SLIM JIM	\$0.25	\$0.49	+49%	\$0.25	\$0.49	+49%
0.97 OZ. SPICY SMOKED SNACKS	SLIM JIM	\$1.01	\$1.39	+27.3%	\$1.09	\$1.49	+26.8%
1.94 OZ. SPICY SMOKED SNACKS	SLIM JIM	\$1.91	\$2.49	+23.3%	\$1.91	\$2.49	+23.3%
1.8 OZ. BEEF STICKS	JACK LINKS	\$1.18	\$1.99	+40.7%	\$1.33	\$1.99	+40.7%
3.65 OZ. Beef Jerky	JACK LINKS	\$5.12			\$5.85		
1.8 OZ. Beef Jerky	JACK LINKS	\$2.79			\$3.19		
1.6 OZ. BEEF & CHEESE	JACK LINKS	\$1.03			\$1.26		
1 OZ. BEEF STEAK	JACK LINKS	\$1.03			\$1.30		
2 OZ. BEEF STEAK	JACK LINKS	\$2.03			\$2.21		
0.875 OZ. HOT SAUSAGE	PENROSE	\$0.49			\$0.51		
1.7 OZ. HOT SAUSAGE	PENROSE	\$0.82			\$1.07		
2.4 OZ. HOT SAUSAGE	PENROSE	\$0.95			\$1.07		

# Total Meat Snacks Category Development By Region

IRI Region	Households (Millions)	Retail Sales Per Million Households	Category Development Index (CDI)
West	10.6	\$18.96	163
South Central	11.6	\$17.98	155
Plains	7.5	\$12.89	111
Mid South	12.9	\$11.66	100
<b>U.S.</b>	<b>105.4</b>	<b>\$11.63</b>	<b>100</b>
California	11.7	\$10.71	92
Great Lakes	17.1	\$10.54	91
Southeast	13.8	\$10.09	87
Northeast	20.2	\$6.17	53

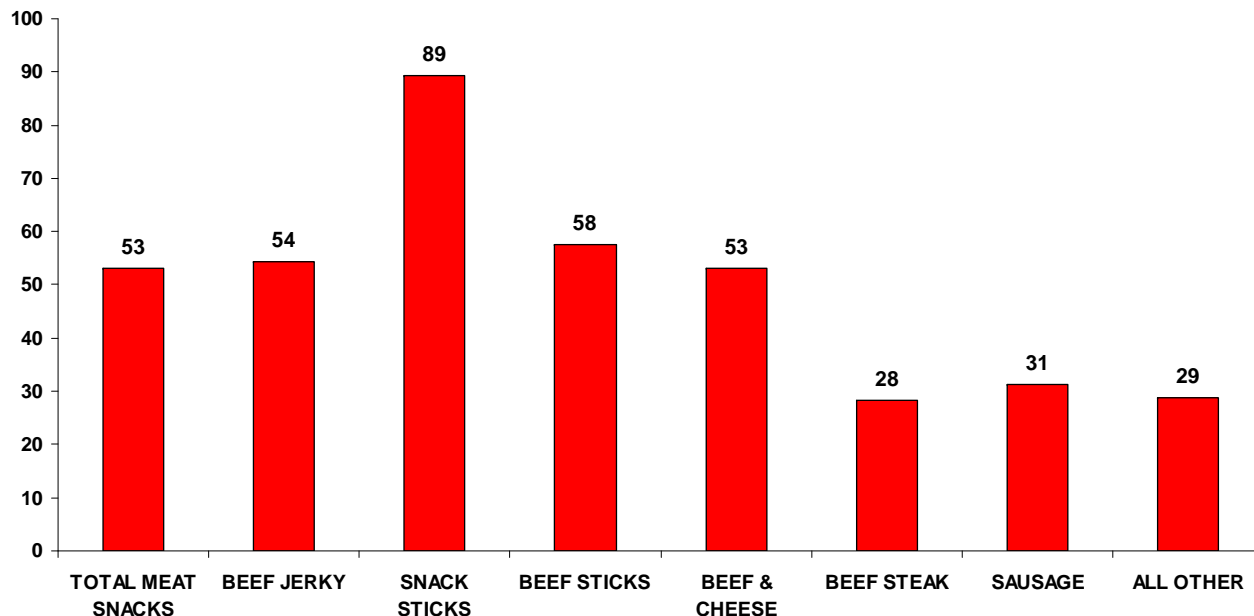


Source: IRI - 52 Weeks Ending Aug 12, 2007 - Total C-Stores and Food/Mass/Drug (excluding Wal-Mart Stores)

# Northeast Region Meat Snacks CDI's

The **Northeast Region** is substantially underdeveloped in all major Meat Snacks product segments except Snack sticks (89 CDI) . . . In fact; the Northeast Region has the lowest category development indices in the Total U.S. for the important Beef Jerky segment (54) and Beef Steak (28).

## Meat Snacks Category Development Indices Northeast Region

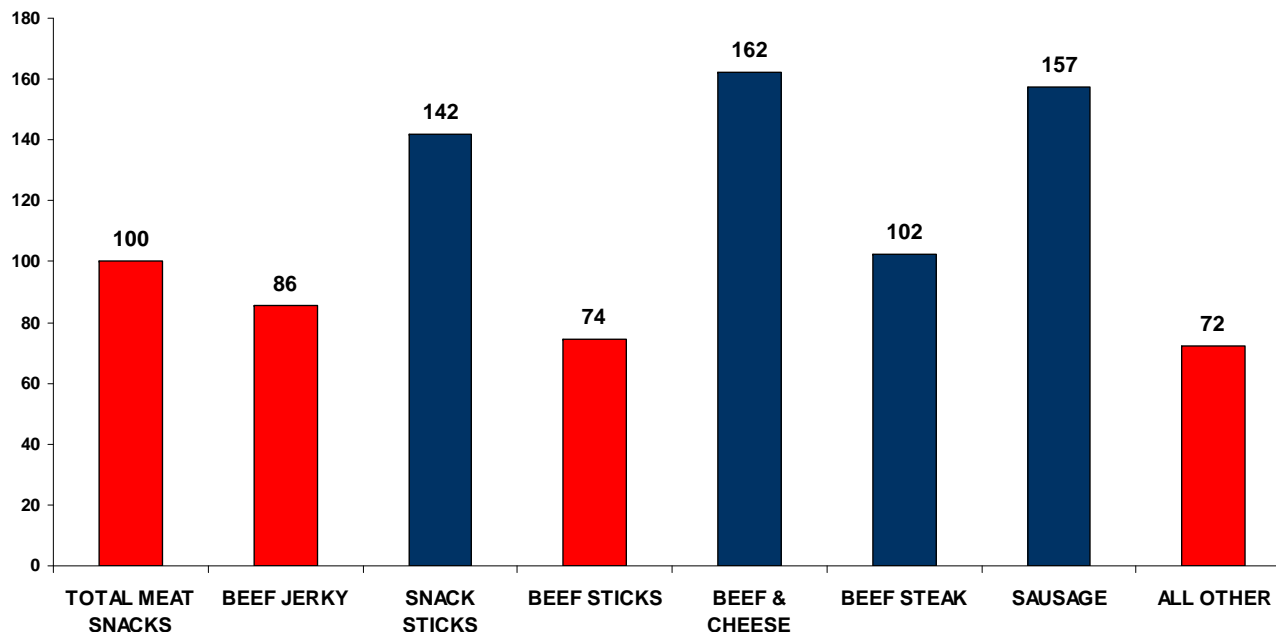


Source: IRI - 52 Weeks Ending Aug 12, 2007 - Total C-Stores and Food/Mass/Drug (excluding Wal-Mart Stores)

# Mid South Region Meat Snacks CDI's

The Snack Sticks (142 CDI), **Beef & Cheese** (162 – highest in the U.S.) and Sausage (157) segments are highly developed in the **Mid South Region**, while the Beef Jerky (86) and Beef Sticks (74) segments are underdeveloped . . . Beef Steak development is average.

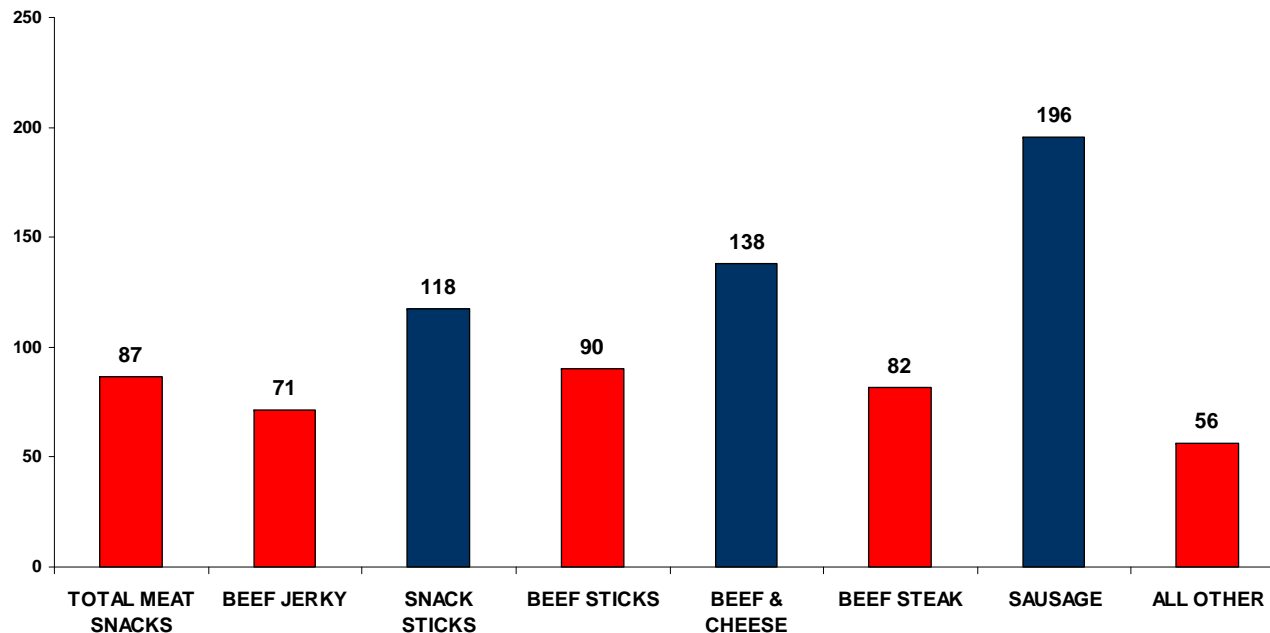
## Meat Snacks Category Development Indices Mid South Region



# Southeast Region Meat Snacks CDI's

With the exception of Beef Sticks (90) and Beef Steak (82), single-serve meat snacks are highly developed in the **Southeast Region**, particularly **Sausage** with a CDI of 196 (highest in the U.S.) . . . Beef Jerky is underdeveloped with a 71 CDI.

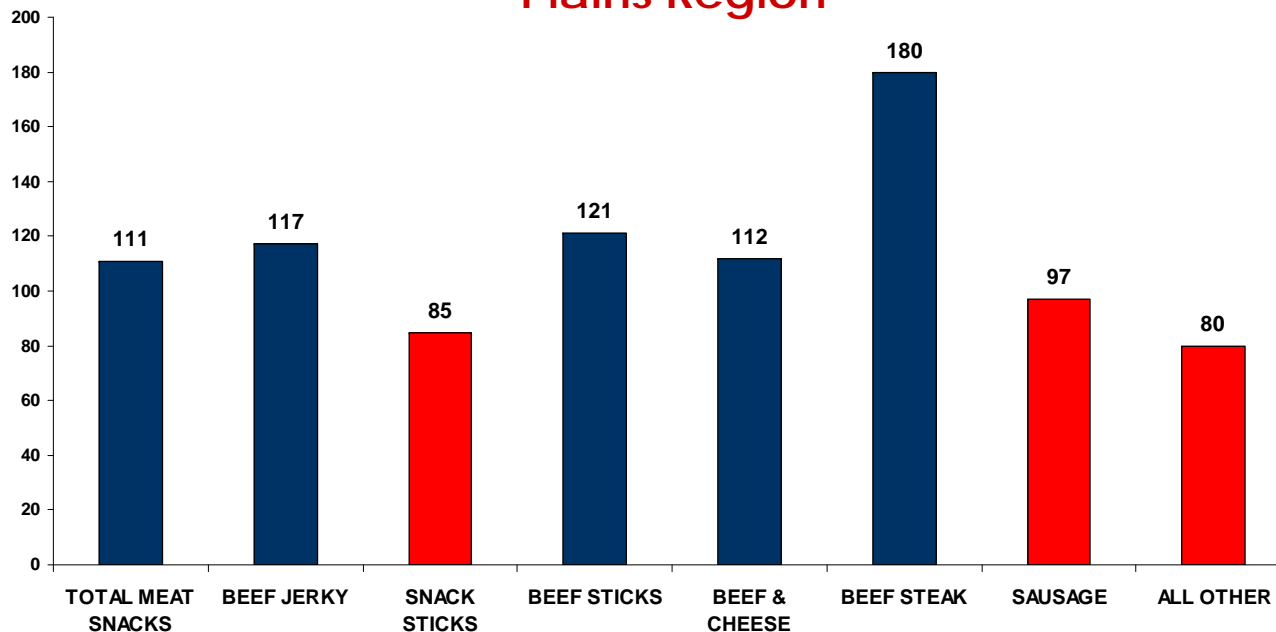
## Meat Snacks Category Development Indices Southeast Region



# Plains Region Meat Snacks CDI's

Four product segments – Beef Jerky (117 CDI), Beef Sticks (121), Beef & Cheese (112) and Beef Steak (180) are highly developed in the **Plains Region** . . . Only Snack Stick (85) and All Other (80) are underdeveloped. The **Beef Steak CDI** is the highest in the Total U.S. (180)

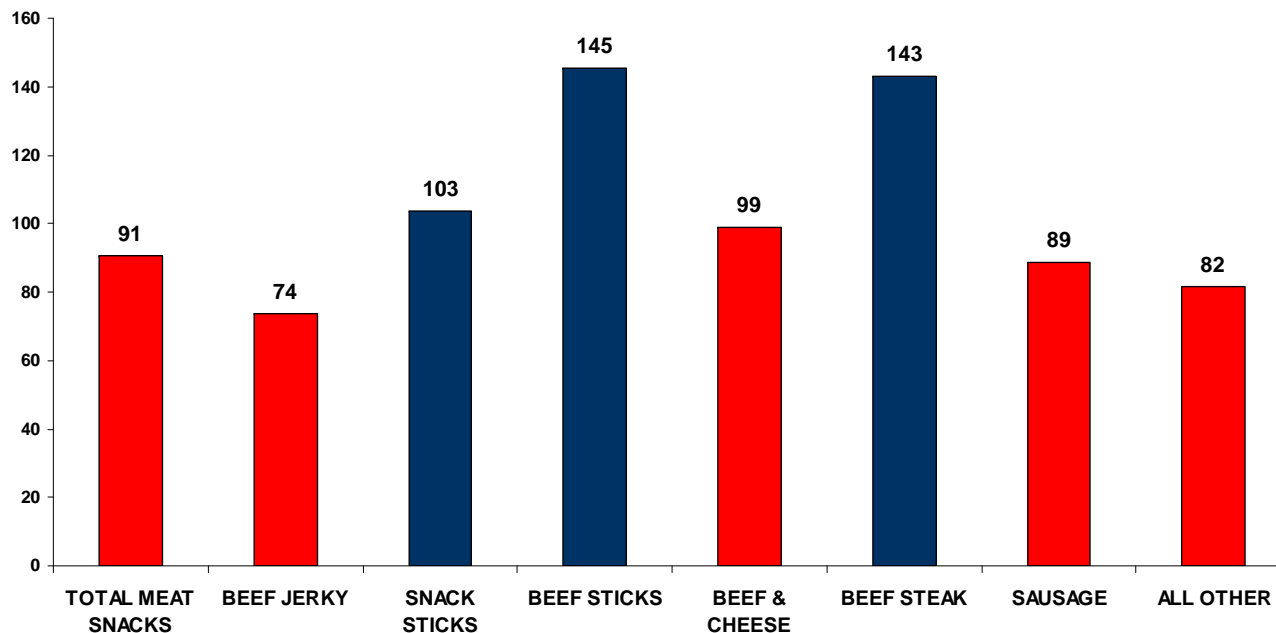
Meat Snacks Category  
Development Indices  
**Plains Region**



# Great Lakes Region Meat Snacks CDI's

The Beef Sticks (145 CDI) and Beef Steak (143) segments are highly developed in the **Great Lakes Region**. . . Beef Jerky (74) is the driver of the region's below average overall Meat Snacks CDI (91).

## Meat Snacks Category Development Indices Great Lakes Region



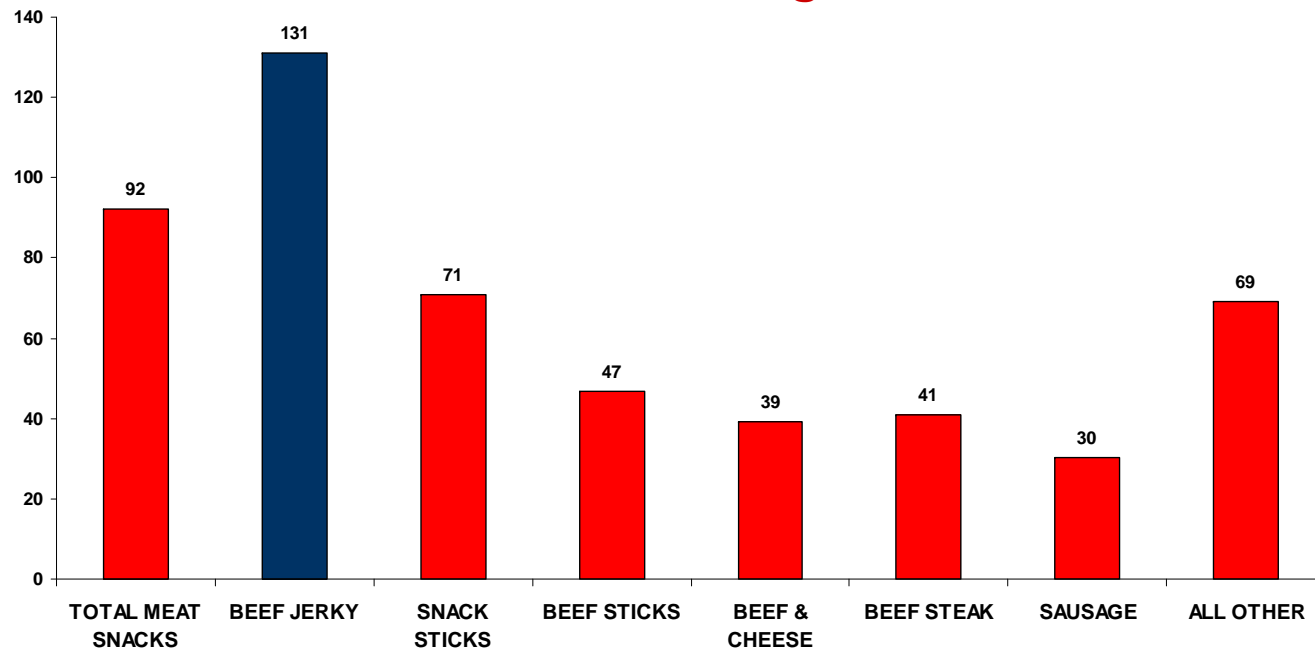
Source: IRI - 52 Weeks Ending Aug 12, 2007 - Total C-Stores and Food/Mass/Drug (excluding Wal-Mart Stores)



# California Region Meat Snacks CDI's

The **California Region** is highly developed in the Beef Jerky segment (131), but is significantly underdeveloped in all of the remaining segments, explaining why its overall category index is only 92 . . .

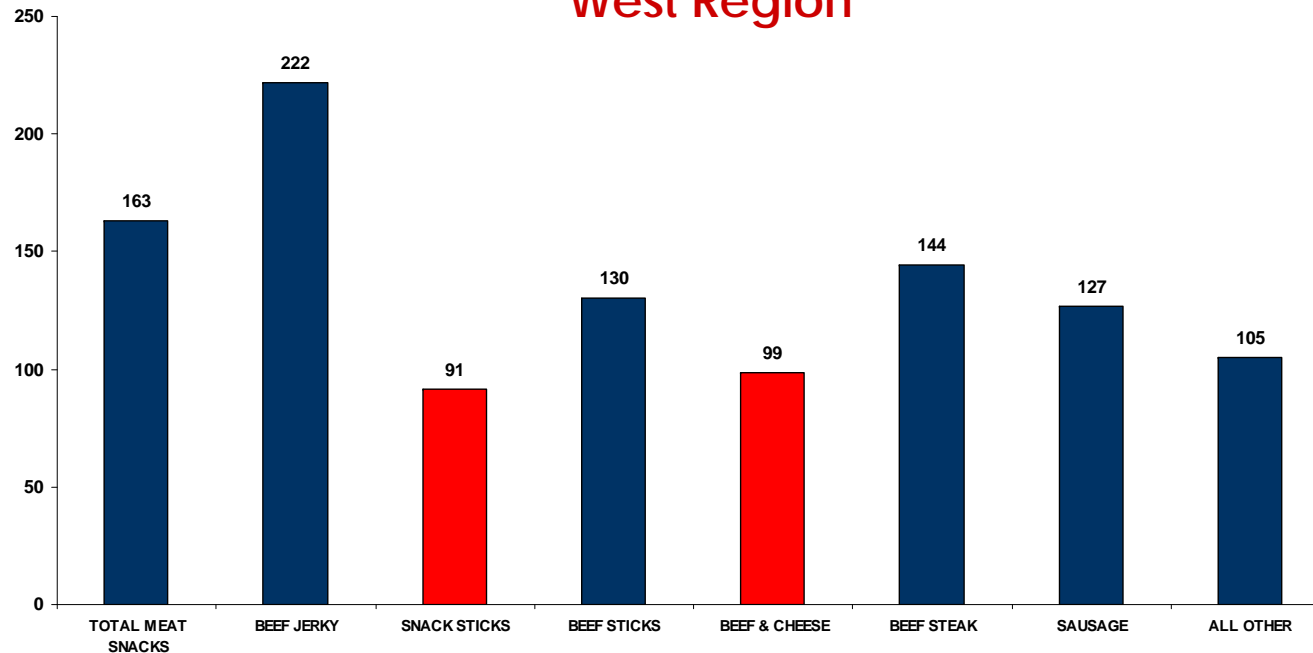
## Meat Snacks Category Development Indices California Region



# West Region Meat Snacks CDI's

The **West Region** is the most developed region in the Total U.S. (163 CDI), driven by Beef Jerky (222) . . . . Only the Snack Sticks and Beef & Cheese segments have below-average development

Meat Snacks Category  
Development Indices  
**West Region**



# Regional Meat Snacks Retail Sales

REGION	TOTAL MEAT SNACKS	BEEF JERKY	SNACK STICKS	BEEF STICKS	BEEF & CHEESE	BEEF STEAK	SAUSAGE	ALL OTHER
<b>TOTAL U.S.</b>								
Total Retail Sales (millions)	\$1,225.6	\$577.3	\$197.1	\$54.2	\$58.5	\$104.9	\$52.1	\$181.5
Retail Sales Per MM HHLDS.	\$11.63	\$5.48	\$1.87	\$0.51	\$0.55	\$0.99	\$0.49	\$1.72
<b>NORTHEAST</b>								
Total Retail Sales	\$124.6	\$60.1	\$33.7	\$6.0	\$6.0	\$5.7	\$3.1	\$10.0
Retail Sales Per MM HHLDS.	\$6.17	\$2.98	\$1.67	\$0.30	\$0.29	\$0.28	\$0.15	\$0.50
CDI	53	54	89	58	53	28	31	29
<b>MIDSOUTH</b>								
Total Retail Sales (millions)	\$150.3	\$60.5	\$34.2	\$4.9	\$11.6	\$13.1	\$10.0	\$16.0
Retail Sales Per MM HHLDS.	\$11.66	\$4.69	\$2.65	\$0.38	\$0.90	\$1.02	\$0.78	\$1.24
CDI	100	86	142	74	162	102	157	72
<b>SOUTHEAST</b>								
Total Retail Sales (millions)	\$139.4	\$53.9	\$30.4	\$6.4	\$10.6	\$11.3	\$13.4	\$13.4
Retail Sales Per MM HHLDS.	\$10.09	\$3.91	\$2.20	\$0.46	\$0.76	\$0.82	\$0.97	\$0.97
CDI	87	71	118	90	138	82	196	56
<b>SOUTH CENTRAL</b>								
Total Retail Sales (millions)	\$208.5	\$124.5	\$22.1	\$8.6	\$8.6	\$18.4	\$6.5	\$19.8
Retail Sales Per MM HHLDS.	\$17.98	\$10.73	\$1.90	\$0.74	\$0.74	\$1.59	\$0.56	\$1.71
CDI	155	196	102	145	134	160	114	99
<b>PLAINS</b>								
Total Retail Sales (millions)	\$96.7	\$48.1	\$11.9	\$4.7	\$4.7	\$13.4	\$3.6	\$10.3
Retail Sales Per MM HHLDS.	\$12.89	\$6.41	\$1.58	\$0.62	\$0.62	\$1.79	\$0.48	\$1.38
CDI	111	117	85	121	112	180	97	80
<b>GREAT LAKES</b>								
Total Retail Sales (millions)	\$180.2	\$69.1	\$33.1	\$12.8	\$9.4	\$24.3	\$7.5	\$24.0
Retail Sales Per MM HHLDS.	\$10.54	\$4.04	\$1.93	\$0.75	\$0.55	\$1.42	\$0.44	\$1.40
CDI	91	74	103	145	99	143	89	82
<b>CALIFORNIA</b>								
Total Retail Sales (millions)	\$125.2	\$83.9	\$15.5	\$2.8	\$2.5	\$4.8	\$1.8	\$13.9
Retail Sales Per MM HHLDS.	\$10.71	\$7.17	\$1.33	\$0.24	\$0.22	\$0.41	\$0.15	\$1.19
CDI	92	131	71	47	39	41	30	69
<b>WEST</b>								
Total Retail Sales (millions)	\$201.0	\$128.9	\$18.1	\$7.1	\$5.8	\$15.2	\$6.7	\$19.2
Retail Sales Per MM HHLDS.	\$18.96	\$12.16	\$1.71	\$0.67	\$0.55	\$1.44	\$0.63	\$1.81
CDI	163	222	91	130	99	144	127	105