

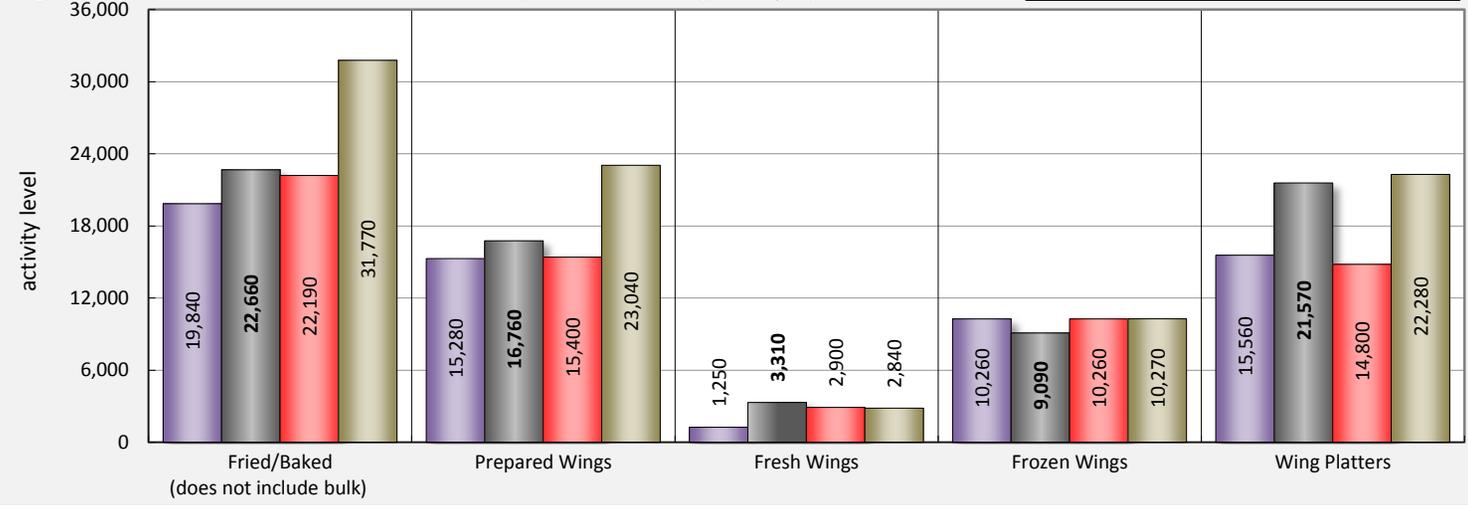


**Special Report - Retail Chicken Feature Activity for the Super Bowl Demand Period**  
 Advertised Prices to Consumers at Major Retail Supermarket Outlets Leading up to Sunday, February 03, 2013  
 (prices in dollars per pound unless otherwise noted)

February 01, 2013

NATIONAL SUMMARY	2013		2012	
	Feature Rate:	90.4% of 23,200 outlets		86.1% of 22,500 outlets
Activity Index:	108,920		81,500	
<b>Fried/Baked: 4/</b>				
Mixed 8-piece, fried	8,470	6.75	7,400	6.16
Mixed 8-piece, baked	3,830	6.81	2,020	5.83
Dark 8-piece, f/b	2,940	5.28	710	4.86
Mixed 12-piece, f/b	2,750	10.46	730	9.78
Mixed 24-piece, f/b	3,300	21.14	1,750	20.13
Mixed 50-piece, f/b	5,580	43.23	5,740	41.22
Mixed 100-piece, f/b	4,900	82.74	3,840	79.28
Bulk Pack (\$/piece)	9,720	0.85	13,070	0.81
<b>Wings:</b> bone-in	13,450	5.03	8,190	4.75
boneless	5,040	4.48	5,490	4.44
<b>Tenders</b>	4,550	5.39	1,720	5.28
<b>Whl Rotisserie &lt;2 Lb</b>	2,160	6.07	1,730	5.59
<b>Wing Platters (per)</b>				
serves 8-10	9,840	25.67	6,410	26.09
serves 10-15	8,840	39.84	4,540	38.41
serves 20-25	3,600	55.12	3,850	53.44
<b>Tender Platters (per)</b>				
serves 8-10	4,230	25.45	1,640	31.88
serves 10-15	2,280	37.59	1,550	39.11
serves 20-25	3,170	51.11	860	58.53
<b>Fresh Wings:</b>	2,840	2.60	2,900	2.05
<b>Wings /5</b>	5,010	2.51	2,800	2.13
<b>Party Wings /6</b>	2,420	2.69	4,560	1.92

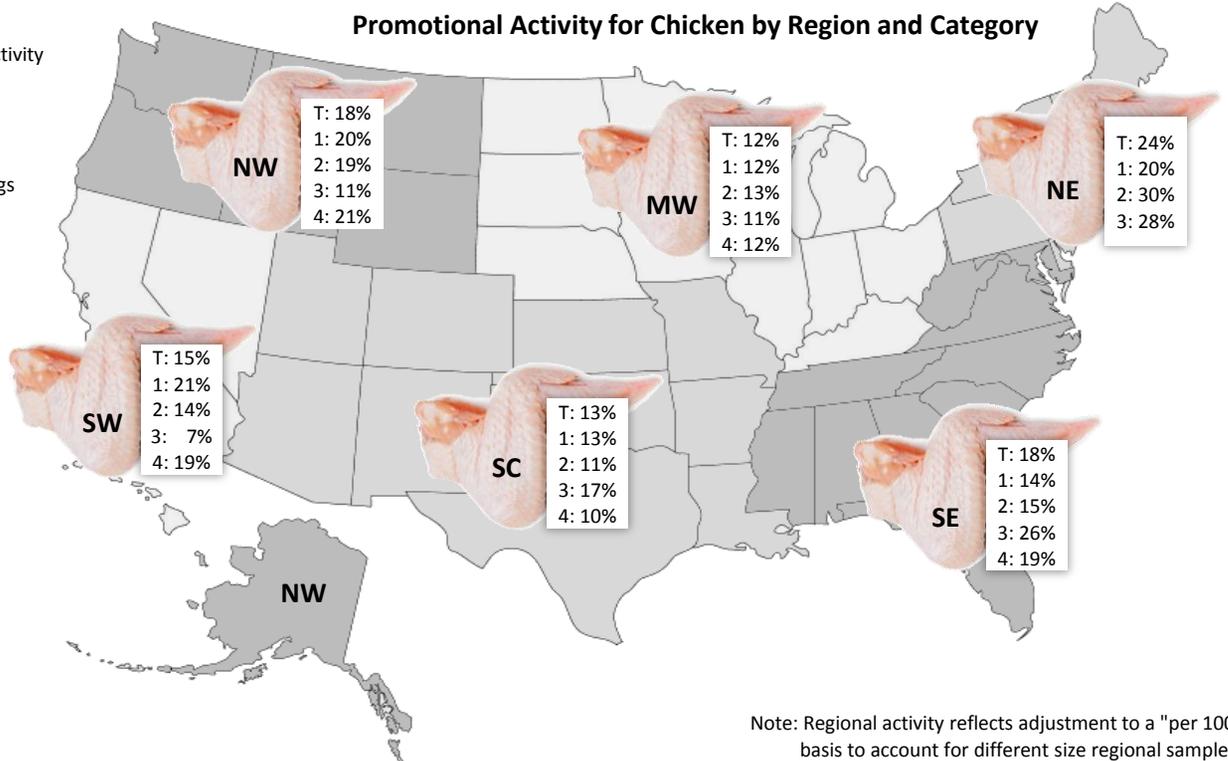
**Super Bowl - Year-to-Year Promotional Activity for Chicken by Category**



T = % of total promotional activity

- 1 = Fried/Baked
- 2 = Prepared
- 3 = Platters
- 4 = Frsh/Frz wings

**Promotional Activity for Chicken by Region and Category**



**Baltimore Ravens**

Percentage of sampled stores associating Chicken with the Super Bowl in their ads.



**San Francisco 49ers**

Note: Regional activity reflects adjustment to a "per 100 store" basis to account for different size regional samples.



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U.S. Region	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)				SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)				MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)				SOUTHWEST U.S. (CA,HI,NV)				NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
Feature Rate 1/ Activity Index 2/	91.1% of 4,600 stores Activity Index = 30,940				92.6% of 6,100 stores Activity Index = 30,430				88.9% of 4,200 stores Activity Index = 13,740				89.1% of 4,200 stores Activity Index = 15,460				87.3% of 2,900 stores Activity Index = 12,500				92.6% of 1,200 stores Activity Index = 5,850			
	price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg	
<b>FRIED/BAKED CHICKEN: 4/</b>																								
Mixed 8-piece, fried	3.99 - 8.99	1,780	6.70	5.99 - 7.99	1,190	7.02	4.95 - 8.99	1,270	6.83	4.99 - 7.99	1,560	6.83	4.98 - 7.99	2,110	6.63	5.00 - 6.99	560	6.43						
Mixed 8-piece, baked	6.99	240	6.99	5.99 - 7.99	710	6.99	5.99 - 8.00	720	6.94	5.99 - 6.99	690	6.90	4.99 - 6.99	1,200	6.49	6.98 - 6.99	270	6.99						
Dark 8-piece, f/b	3.29 - 5.99	280	5.35	4.99 - 5.99	1,370	5.14	3.99 - 5.99	150	5.20	4.78 - 5.99	340	5.23	4.99 - 5.99	740	5.54	4.99 - 5.99	60	5.14						
Mixed 12-piece, f/b	7.48 - 12.49	900	10.49	8.70 - 11.25	330	10.29	8.99 - 15.99	380	10.91	8.99 - 18.39	390	10.85	10.49 - 11.99	420	10.93	8.98 - 8.99	330	8.99						
Mixed 24-piece, f/b	16.99 - 29.00	770	21.60	14.99 - 26.25	1,620	21.29	12.95 - 24.99	380	19.59	14.99 - 29.99	220	21.92	12.99 - 22.49	310	20.53									
Mixed 50-piece, f/b	36.45 - 50.75	1,730	44.73	36.45 - 50.75	1,630	42.79	36.45 - 59.99	770	43.16	39.99 - 55.00	680	42.24	29.99 - 48.99	570	41.87	41.49	200	41.49						
Mixed 100-piece, f/b	69.99 - 96.99	1,820	86.35	74.99 - 89.99	1,430	76.81	69.99 - 106.99	760	84.72	74.99 - 110.00	420	86.03	58.99 - 79.99	270	79.04	82.98	200	82.98						
Bulk Pack (\$/piece)	0.62 - 1.25	2,780	0.96	0.73 - 1.00	1,540	0.82	0.62 - 1.19	1,050	0.86	0.59 - 0.95	1,910	0.81	0.55 - 0.98	1,280	0.75	0.59 - 0.83	1,160	0.80						
<b>PREPARED CHICKEN</b>																								
<b>Wings:</b> bone-in	3.98 - 7.99	3,940	5.33	2.98 - 6.99	4,080	4.95	3.99 - 6.99	1,620	4.81	1.99 - 6.50	1,610	4.81	2.99 - 7.99	1,500	5.22	3.78 - 5.99	700	4.31						
boneless	3.33 - 6.99	1,850	4.89	3.33 - 6.99	620	5.51	3.33 - 6.99	890	4.25	3.33 - 6.49	740	4.12	2.98 - 3.33	580	3.31	3.33 - 7.49	360	3.74						
<b>Tenders</b>	2.99 - 7.99	2,400	5.44	4.98 - 5.99	870	5.47	3.69 - 5.99	600	5.03	2.00 - 6.89	470	5.57	4.99	180	4.99	4.99 - 6.99	30	6.26						
<b>Whl Rotisserie &lt;2 Lb</b>	4.69 - 6.99	740	5.66	4.99 - 6.99	220	6.00	4.99 - 7.29	390	6.35	4.99 - 6.99	90	6.15	5.00 - 6.99	350	6.81	4.00 - 6.00	370	5.92						
<b>PLATTERS/TRAYS</b>																								
<b>Wing Platters (per)</b>																								
serves 8-10	14.99 - 39.00	3,130	29.72	14.99 - 34.99	2,580	25.57	16.99 - 37.99	1,260	22.66	18.95 - 29.99	1,740	23.95	16.99 - 29.99	690	19.33	17.99 - 34.99	440	22.87						
serves 10-15	29.99 - 55.00	2,860	44.53	22.99 - 54.99	3,530	38.35	29.95 - 49.99	690	38.89	24.99 - 49.99	1,170	34.51	34.99 - 36.99	350	36.58	37.99 - 60.00	240	39.08						
serves 20-25	49.99 - 95.00	1,180	67.39	37.99 - 69.99	960	51.46	44.99 - 69.99	330	55.83	32.95 - 69.99	1,090	44.64	49.99 - 90.00	40	61.05									
<b>Tender Platters (per)</b>																								
serves 8-10	24.99 - 39.99	740	36.86	14.99 - 39.99	1,490	24.93	19.99 - 34.99	610	20.61	19.99 - 29.99	890	21.74	19.99	290	19.99	19.99 - 29.99	210	26.16						
serves 10-15	39.99 - 49.99	600	44.17	30.99 - 42.99	1,260	35.93	29.99 - 54.99	150	34.03	29.99 - 39.99	140	35.19	29.99	130	29.99									
serves 20-25	45.00 - 64.99	790	62.15	39.99 - 69.00	1,910	47.67	39.99 - 69.99	320	42.44	45.99 - 59.99	150	55.30												
<b>FRESH and FROZEN WINGS</b>																								
<b>Fresh Wings:</b>	1.99 - 2.99	240	2.75	1.19 - 2.99	500	2.47	1.79 - 2.99	300	2.74	1.99 - 2.99	510	2.27	2.99 - 3.49	650	3.21	1.99 - 2.49	640	2.24						
<b>IQF Wings 5/</b>	2.00 - 4.00	1,600	2.58	2.25 - 2.99	1,830	2.57	1.99 - 3.00	850	2.41	2.33 - 2.80	290	2.70	1.99 - 2.20	400	2.01	2.20	40	2.20						
<b>Party Wings 6/</b>	1.47 - 3.99	570	3.03	2.00 - 3.49	760	2.47	1.99 - 3.40	250	2.63	2.28 - 3.33	360	2.94	1.99 - 3.00	480	2.48									

**REPORT NOTES**

All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ **FEATURE RATE:** the amount of sampled stores advertising any reported chicken item during the current week, expressed as a percentage of the total sample

2/ **ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised chicken item (e.g., a retailer with 100 outlets featuring 3 chicken items has an activity index of 300).

3/ **STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets.

4/ for reporting purposes, some odd-count promotions converted to the closest reported category (e.g., 20 piece price converted to 16 piece price).

5/ frozen wings are IQF in bags converted to a per pound basis. /6: frozen party wings are pre-cooked and packed IQF in bags.



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Year-to-Year Comparison	Avg. Ad Price			Feature Rate		
	2013	2012	change	2013	2012	change
<b>Fried/Baked:</b>						
Mixed 8-piece, fried	6.75	6.16	↑	8,470	7,400	↑
Mixed 8-piece, baked	6.81	5.83	↑	3,830	2,020	↑
Dark 8-piece, f/b	5.28	4.86	↑	2,940	710	↑
Mixed 12-piece, f/b	10.46	9.78	↑	2,750	730	↑
Mixed 24-piece, f/b	21.14	20.13	↑	3,300	1,750	↑
Mixed 50-piece, f/b	43.23	41.22	↑	5,580	5,740	↓
Mixed 100-piece, f/b	82.74	79.28	↑	4,900	3,840	↑
Bulk Pack (\$/piece)	0.85	0.81	↑	9,720	13,070	↓
Wings: bone-in	5.03	4.75	↑	13,450	8,190	↑
boneless	4.48	4.44	↑	5,040	5,490	↓
<b>Tenders</b>	5.39	5.28	↑	4,550	1,720	↑
<b>Whl Rotisserie &lt;2 Lb</b>	6.07	5.59	↑	2,160	1,730	↑
<b>Wing Platters (per)</b>						
serves 8-10	25.67	26.09	↓	9,840	6,410	↑
serves 10-15	39.84	38.41	↑	8,840	4,540	↑
serves 20-25	55.12	53.44	↑	3,600	3,850	↓
<b>Tender Platters (per)</b>						
serves 8-10	25.45	31.88	↓	4,230	1,640	↑
serves 10-15	37.59	39.11	↓	2,280	1,550	↑
serves 20-25	51.11	58.53	↓	3,170	860	↑
<b>Fresh Wings:</b>	2.60	2.05	↑	2,840	2,900	↓
<b>IQF</b>						
<b>Wings</b>	2.51	2.13	↑	5,010	2,800	↑
<b>Party Wings</b>	2.69	1.92	↑	2,420	4,560	↓

**Category Popularity by Region**

Ranking	NE	SE	MW	SC	SW	NW
<b>Overall</b>	<b>1</b>	2	6	5	4	3
<b>Fried/Baked</b>	3	4	6	5	<b>1</b>	2
<b>Prepared</b>	<b>1</b>	3	5	6	4	2
<b>Fresh Wings</b>	6	4	5	3	2	<b>1</b>
<b>IQF Wings</b>	<b>1</b>	2	4	5	3	6
<b>Wing Platters</b>	<b>1</b>	2	5	3	6	4
<b>Tender Platters</b>	2	<b>1</b>	4	3	6	5

The annual Super Bowl game is the single biggest eating non-holiday of the year and is second only to Thanksgiving in the ranking of all eating events in the U.S. When you consider that the average number of people at a Super Bowl party is 17, it is easy to see why the event rivals Thanksgiving, the only other large gathering eating event on the calendar. The National Chicken Council estimates that 1.23 billion wing portions will be consumed this year over the Super Bowl weekend.

What do these party-goers like to eat? Anything that tastes good and can be eaten with the fingers. And chicken, specifically chicken wings, is tops in both criteria. So much so that the annual Super Bowl game is the single largest demand event for chicken wings, like eggs for Easter or turkey for Thanksgiving. Chicken lends itself well to a variety of preparations that serve the needs of the party-goer (taste) and the party host (pre-cooked for the less ambitious, fresh for that "secret" wing recipe) alike.

In recent years, demand for chicken for the big game has led to shortages in availability driving prices higher, particularly for fresh wings with a 27% increase in the average advertised price and a 5% adjusted decline in featuring. Individually quick frozen wings have proven to be an affordable and more readily available supply with a nearly 75% increase in offering over 2012 with an average increase in ad price of \$0.38 per pound.

Regardless of the weight of the chicken, they only have two wings. Not so with other white chicken meat and suppliers soon turned to boneless alternatives to bone-in wings to compensate for supply shortages. These alternatives quickly have become consumer favorites increasing in popularity each year. Store-made platters of chicken tenders are a good example of a tasty and less-costly alternative. In fact, for the 2013 gridiron contest, platters of tenders have increased in offer while decreasing in ad price, a combination sure to make them a welcome guest at any party. Offerings of tender platters are up a whopping 132% over last year when adjusted for the change in sample size while pricing is down approximately 12% from 2012.

Fried chicken has increased as a popular alternative to wings, most commonly seen in the popular 8-piece pack but stores in some parts of the country offer an almost limitless piece count. This year, large packs of 50 and 100 pieces are more widely offered which has cut into the featuring of bulk packs. Baked and grilled chicken are also seen as rising favorites in this category. On average, ad pricing for fried/baked chicken is up 5% from 2012.

Chicken's popularity has even spawned competition from other protein sources. Pork ribs possess the same attributes as chicken wings and rival them in some parts of the country. Shrimp is a popular offering that is becoming widely available across the country. Not to be outdone, vegetables have managed to carve out a following and often compliment their meat protein counterparts in store-made platters. Carrots and celery are two of the biggest players here but avocados and salsa vegetables are used to create popular dips for all that finger food.

Overall, consumers in the Northeast are most likely to encounter the highest degree of chicken wing and prepared chicken featuring in the country. However, regional preferences are seen in the ranking of the categories of chicken offered. Fried and baked chicken is most popular in the Southwest but only slightly ahead of the South Central and Northeast. Prepared bone-in and boneless wings and tenders can overwhelmingly be found in ads in the Northeast. Fresh wings are featured most often in the Northwest by a large margin with the Northeast bringing up the rear. However, the trend is reversed for IQF wings across the country. Platters are most popular along the Eastern Seaboard with the Southwest preferring alternatives to chicken. Chicken does not appear to have the same attraction in the center of the nation where other proteins are more common and preferred as finger foods.

Note: all feature activity has been adjusted to account for different sized regional sampled store counts.☐