



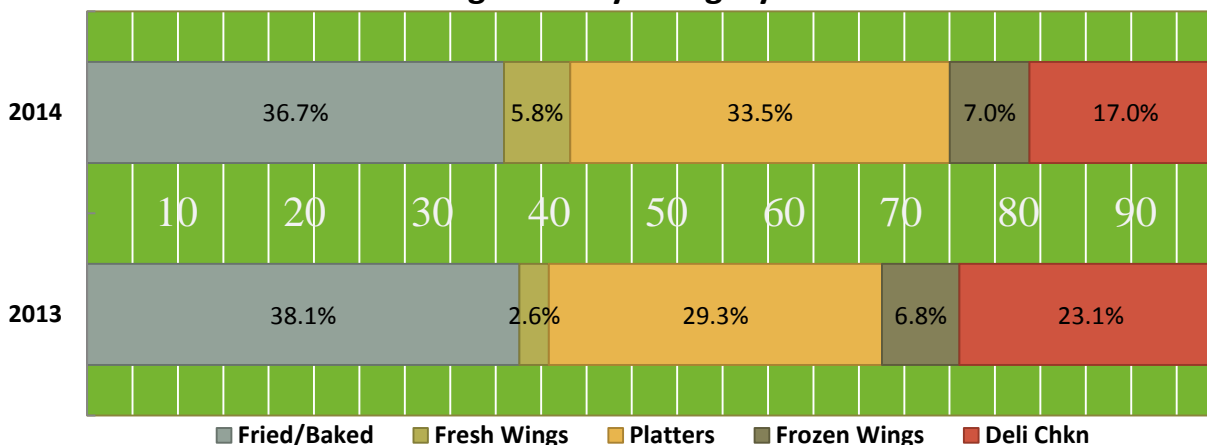
Special Report - Retail Feature Activity for the Super Bowl Demand Period

Advertised Prices to Consumers at Major Retail Supermarket Outlets Leading up to Sunday, February 02, 2014
(conventional product; prices in dollars per pound unless otherwise noted)

January 31, 2014

NATIONAL SUMMARY	Activity Index		Feature Rate	
	2014	2013	2014	2013
All Chicken	167,240	↑ 108,920	94.2%	↑ 90.4%
All Other	127,160	--	83.5%	--
Store Sample Size	27,800	23,200		
Year-to-Year Comparison	Avg. Ad Price		Feature Rate	
	2014	2013	2014	2013
Fried/Baked:	change		change	
8-pack, Fried	7.29	↑ 6.75	9,070	↑ 8,470
8-pack, Baked	7.53	↑ 6.81	4,070	↑ 3,830
8-pack, Dark, frd/bkd	5.82	↑ 5.28	1,190	↓ 2,940
12-pack, fried/baked	10.60	↑ 10.46	3,610	↑ 2,750
24-pack, fried/baked	22.03	↑ 21.14	9,590	↑ 3,300
50-pack, fried/baked	44.72	↑ 43.23	11,890	↑ 5,580
100-pack, fried/baked	86.00	↑ 82.74	10,480	↑ 4,900
Bulk Pack (\$/piece)	0.84	↓ 0.85	11,550	↑ 9,720
Deli Wings: bone-in	5.25	↑ 5.03	13,070	↓ 13,450
boneless	4.66	↑ 4.48	7,310	↑ 5,040
Tenders	5.66	↑ 5.39	3,550	↓ 4,550
Whl Rotisserie <2 Lb	5.95	↓ 6.07	4,440	↑ 2,160
Fresh Wings	2.28	↓ 2.60	9,740	↑ 2,840
IQF Wings	2.32	↓ 2.51	6,140	↑ 5,010
IQF Party Wings	2.20	↓ 2.69	5,580	↑ 2,420
Chicken Platters (price per unit)				
Bone-in Wings				
serves 8-10	25.86	↑ 25.67	14,620	↑ 9,840
serves 10-15	38.77	↓ 39.84	12,010	↑ 8,840
serves 20-25	53.58	↓ 55.12	4,590	↑ 3,600
Boneless Wings				
serves 8-10	24.04	--	3,300	--
serves 10-15	36.70	--	3,510	--
serves 20-25	50.42	--	1,050	--
Tenders				
serves 8-10	26.78	↑ 25.45	5,790	↑ 4,230
serves 10-15	40.04	↑ 37.59	6,610	↑ 2,280
serves 20-25	51.21	↑ 51.11	4,480	↑ 3,170

Chicken Advertising Share by Category - 2014 vs. 2013



Summary of Other Popular Game Day Products

Platters		
2014 (price per unit)	Ad Price	Feature Rate
Pork Ribs		
serves 8-10	24.45	1,350
serves 10-15	26.76	970
serves 20-25	59.65	210
Cheese		
serves 10-15	30.22	9,500
serves 15-20	43.07	14,870
serves 25-30	51.46	9,350
Veggie		
serves 10-15	23.22	6,630
serves 15-20	31.64	9,770
serves 25-30	40.49	6,930
Fruit		
serves 10-15	26.46	5,280
serves 15-20	35.82	8,410
serves 25-30	48.47	4,860
Deviled Eggs		
serves 10-15	15.78	6,170
serves 15-20	29.81	1,420
serves 25-30	34.86	1,310

Pork Spareribs		
2014 (price per unit)	Ad Price	Feature Rate
Spareribs	2.04	7,792
Backribs	3.33	13,123
Country, bone-in	1.85	5,532
St. Louis	2.75	5,923
Deli Ribs, per lb..	6.01	2,046
Deli Ribs, slab (each)	9.44	5,740

When adjusted for different year-to-year sample sizes, 2014 represents a **12%** increase in promotional activity for chicken items over 2013.

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



Note: no 2013 data for comparison.



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January 31, 2014

Advertised Prices to Consumers at Major Retail Supermarket Outlets Leading up to Sunday, February 02, 2014
(conventional product; prices in dollars per pound unless otherwise noted)

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/	98.4% of 5,300 stores Activity Index = 60,810				98.1% of 7,100 stores Activity Index = 86,140				96.3% of 5,700 stores Activity Index = 45,560				83.1% of 5,500 stores Activity Index = 53,890				93.7% of 2,900 stores Activity Index = 32,540				94.2% of 1,300 stores Activity Index = 15,460			
	price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg	
FRIED/BAKED CHICKEN: ^{4/} (mixed white/dark unless noted)																								
8-pack, Fried	4.99 -	11.99	2,100	7.52	4.99 -	7.99	1,480	7.00	5.95 -	10.99	1,700	7.22	4.99 -	8.99	1,650	7.04	4.99 -	7.99	1,390	7.28	5.99 -	43.00	750	7.90
8-pack, Baked		4.99	40	4.99	4.99 -	7.99	1,080	7.62	5.99 -	10.99	1,050	7.66	5.99 -	8.99	950	7.33	4.99 -	7.99	790	7.65	5.99 -	7.99	160	7.33
8-pack, Dark, frd/bkd	3.99 -	5.99	670	5.80	4.55 -	6.66	210	5.92	4.99 -	8.99	30	7.05	4.99 -	7.79	70	5.90	3.99 -	5.99	210	5.59				
12-pack, fried/baked	8.99 -	15.00	1,280	11.00	9.75 -	11.25	100	10.06	8.25 -	15.99	270	11.96	8.25 -	13.39	770	10.28	9.75 -	11.25	870	10.55	8.25 -	8.99	320	8.97
24-pack, fried/baked	18.75 -	30.00	290	22.24	18.75 -	26.25	1,830	22.38	15.00 -	24.99	1,550	23.09	15.00 -	29.99	3,190	22.84	16.50 -	22.99	1,830	20.45	15.00 -	22.99	900	19.76
50-pack, fried/baked	34.99 -	58.00	2,030	45.65	33.99 -	50.75	2,320	43.88	25.00 -	78.99	2,190	45.51	33.99 -	65.99	3,240	46.28	29.98 -	44.99	1,490	41.43	39.99 -	46.85	620	41.84
100-pack, fried/baked	75.00 -	116.00	1,860	89.37	64.99 -	95.00	2,260	81.63	67.98 -	149.99	2,110	86.57	64.99 -	129.99	2,790	90.98	50.98 -	86.99	980	76.84	79.96 -	86.99	480	80.62
Bulk Pack (\$/piece)	0.86 -	0.96	350	0.95	0.80 -	0.94	1,360	0.88	0.62 -	1.18	1,560	0.80	0.79 -	1.10	4,750	0.86	0.46 -	0.87	2,740	0.77	0.80 -	1.07	790	0.88
DELI-PREPARED CHICKEN (per pound)																								
Wings: bone-in	2.99 -	7.99	4,560	5.61	2.88 -	7.60	3,480	4.68	3.33 -	7.99	1,320	4.86	2.99 -	7.99	1,640	5.34	2.99 -	7.99	1,580	5.66	2.99 -	7.99	490	5.34
boneless	3.33 -	7.99	1,860	5.33	3.29 -	5.99	1,780	4.13	3.33 -	6.99	1,080	5.32	2.99 -	6.99	1,020	4.43	3.33 -	4.65	820	3.77	3.33 -	5.99	750	4.56
Tenders	4.97 -	7.99	1,190	5.99	3.33 -	8.80	510	5.51	4.99 -	5.99	660	5.51	3.33 -	7.99	500	5.74	4.99 -	6.99	610	5.21	5.99 -	6.49	80	6.05
Whl Rotisserie <2 Lb	4.97 -	8.99	1,880	5.55	4.00 -	6.99	1,060	6.13	3.99 -	7.99	430	5.67	3.99 -	6.99	440	6.64	4.99 -	6.99	450	6.51	5.99 -	6.99	180	6.56
CHICKEN PLATTERS/TRAYS (price per unit)																								
Bone-in Wing																								
serves 8-10	10.99 -	49.99	2,160	29.85	17.99 -	49.99	3,740	26.02	16.99 -	49.99	3,390	25.32	14.99 -	34.99	2,720	25.41	16.99 -	29.99	1,580	22.68	17.99 -	39.99	1,030	24.72
serves 10-15	29.99 -	69.99	1,900	42.00	26.99 -	79.99	4,570	37.49	26.99 -	69.99	1,650	40.74	28.99 -	49.99	2,220	38.03	19.99 -	44.99	1,180	38.33	29.99 -	69.99	490	36.00
serves 20-25	49.99 -	85.00	1,050	68.63	40.00 -	99.99	2,000	47.91	37.99 -	70.99	290	58.82	36.95 -	69.99	820	47.33	49.99 -	79.99	180	51.49	38.99 -	99.99	250	51.53
Boneless Wings																								
serves 8-10	11.99 -	16.99	220	16.58	24.99 -	29.99	490	25.66	19.98 -	24.99	750	24.83	19.99 -	24.99	820	24.78	19.98 -	24.99	810	23.37		24.99	210	24.99
serves 10-15	22.99 -	55.00	780	30.97	29.99 -	39.99	860	37.17	39.99 -	49.99	630	40.25	26.95 -	39.99	740	38.70		39.99	290	39.99	29.99 -	39.99	210	33.82
serves 20-25	37.99 -	95.00	880	50.35	49.99 -	57.99	120	53.82					34.99 -	69.99	50	43.55								
Tenders																								
serves 8-10	12.99 -	39.99	540	31.41	19.99 -	39.00	2,720	28.17	14.99 -	34.99	770	24.03	18.95 -	29.99	1,130	24.70	19.98 -	24.99	420	23.45		24.99	210	24.99
serves 10-15	30.99 -	55.00	1,380	40.97	29.99 -	69.00	2,810	41.88	24.99 -	54.99	720	39.66	24.99 -	39.99	940	37.65	29.98 -	39.99	550	35.29	29.99 -	39.99	210	33.82
serves 20-25	34.99 -	95.00	1,010	57.17	36.98 -	99.00	3,010	50.13	36.99 -	69.99	240	44.26	32.95 -	59.99	220	46.26								

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).

U.S. Region	NORTHEAST U.S. <small>(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)</small>				SOUTHEAST U.S. <small>(AL,FL,GA,MS,NC,SC,TN,VA,WV)</small>				MIDWEST U.S. <small>(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)</small>				SOUTH CENTRAL U.S. <small>(AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)</small>				SOUTHWEST U.S. <small>(CA,HI,NV)</small>				NORTHWEST U.S. <small>(AK,ID,MT,OR,WA,WY)</small>			
	price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg		price range	stores	avg	
FRESH and FROZEN CHICKEN WINGS																								
Fresh Wings	1.39 -	3.49	3,130	2.28	0.99 -	3.49	3,740	2.50	1.25 -	2.49	1,150	2.06	0.98 -	2.88	1,250	1.88	1.59 -	1.99	120	1.90	1.99 -	2.79	350	2.08
IQF Wings	1.30 -	3.33	2,640	2.24	1.66 -	2.86	760	2.25	1.29 -	3.00	1,430	2.28	1.69 -	3.00	700	2.46	2.25 -	2.69	600	2.66	1.49 -	2.00	10	1.73
IQF Party Wings	1.49 -	3.33	1,290	2.30	1.19 -	2.69	830	2.01	1.49 -	2.98	1,290	1.90	1.49 -	2.79	1,010	2.26	2.00 -	3.79	1,030	2.50	2.19 -	2.50	130	2.34
FRESH and DELI COOKED (each) PORK SPARERIBS																								
Spareribs	1.99 -	2.49	1,050	2.08	1.78 -	2.49	3,460	2.00	1.77 -	2.49	440	2.27	0.99 -	2.49	820	1.99	1.59 -	2.69	1,350	1.91	1.98 -	2.99	670	2.39
Backribs	1.99 -	4.99	2,410	3.45	2.59 -	4.97	2,440	3.42	1.99 -	4.99	2,920	3.38	2.49 -	3.99	2,190	3.19	2.49 -	4.99	2,310	3.28	2.79 -	3.99	850	3.03
Country, bone-in	0.97 -	2.98	1,640	1.80	1.48 -	1.99	1,180	1.94	0.97 -	2.49	800	1.78	0.99 -	2.99	1,080	1.92	0.99 -	1.99	690	1.79	1.19 -	2.49	140	1.64
St. Louis	1.99 -	3.98	1,740	2.74	1.99 -	3.99	1,210	2.69	1.99 -	3.49	790	2.24	1.99 -	3.99	1,190	2.88	2.79 -	3.99	730	3.17	2.49 -	3.49	260	2.95
Deli Ribs, per lb..	3.99 -	5.99	320	5.62	5.98 -	5.99	80	5.99	2.29 -	8.57	210	7.87	4.99 -	8.57	410	6.18	3.99 -	5.99	680	5.61	2.98 -	5.99	340	5.84
Deli Ribs, slab (each)	6.99 -	13.99	1,270	8.39	7.99 -	11.99	910	9.55	8.99 -	13.99	780	9.89	7.99 -	13.99	1,270	10.12	7.99 -	12.99	760	9.56	8.99 -	10.99	740	9.37
VARIOUS PLATTERS/TRAYS (price per unit)																								
Pork Ribs																								
serves 8-10									19.98 - 39.99 40 26.51				13.99 - 24.99 680 24.78				19.98 - 24.99 420 23.45				24.99 210 24.99			
serves 10-15	50.00 10 50.00				24.99 410 24.99				24.99 - 59.99 470 25.66				29.99 - 44.99 80 39.39											
serves 20-25	95.00 10 95.00								59.99 - 79.99 130 61.41				49.99 - 59.99 70 51.34											
Cheese																								
serves 10-15	20.97 - 60.00 2,970 30.55				19.99 - 39.95 3,020 32.58				13.99 - 39.99 1,240 25.96				19.99 - 49.99 1,010 27.99				21.99 - 49.99 720 29.42				14.99 - 69.99 540 30.32			
serves 15-20	29.99 - 80.00 3,550 46.88				29.99 - 59.99 7,590 40.70				25.99 - 59.99 950 40.00				28.99 - 64.99 1,470 42.36				29.99 - 59.99 640 53.09				24.99 - 74.99 670 46.13			
serves 20-30	34.99 - 100.00 1,800 62.78				35.99 - 89.99 4,200 45.18				34.99 - 79.99 980 50.94				29.99 - 59.99 1,280 48.36				54.99 - 64.99 600 60.31				34.99 - 89.99 490 62.00			
Veggie																								
serves 10-15	12.99 - 39.99 1,470 21.29				12.99 - 39.99 1,760 24.30				14.99 - 39.99 1,290 23.74				12.99 - 37.95 1,510 22.04				12.99 - 39.99 350 25.46				12.99 - 49.99 250 28.19			
serves 15-20	22.99 - 60.00 1,250 31.09				22.99 - 59.99 3,170 30.68				24.99 - 61.99 2,000 34.46				20.95 - 49.99 1,890 29.45				22.99 - 49.99 1,020 34.10				19.99 - 54.99 440 31.03			
serves 20-30	29.98 - 75.00 1,480 38.20				29.99 - 59.99 3,220 38.28				34.99 - 83.99 1,080 47.19				25.95 - 59.99 970 41.52				54.99 - 69.99 20 61.58				39.99 - 89.99 160 52.05			
Fruit																								
serves 10-15	14.95 - 45.99 1,370 23.91				16.99 - 39.99 1,340 26.51				14.95 - 49.99 1,040 26.76				12.99 - 49.99 1,010 26.00				12.99 - 49.99 220 38.17				12.99 - 34.99 300 29.81			
serves 15-20	26.95 - 65.00 1,100 35.55				24.99 - 59.99 3,140 34.88				24.99 - 59.99 1,550 38.54				26.95 - 59.99 1,340 34.52				26.98 - 59.99 850 35.51				29.99 - 64.95 430 38.25			
serves 20-30	32.99 - 85.00 1,060 42.46				35.99 - 69.00 2,010 47.85				39.99 - 99.00 910 57.23				36.95 - 69.99 820 47.32				49.99 - 69.99 10 62.85				49.00 - 99.95 50 57.68			
Deviled Eggs																								
serves 10-15	12.00 - 29.95 1,220 18.11				12.99 - 19.99 1,740 18.31				7.99 - 24.99 1,270 15.02				8.99 - 19.99 1,010 12.55				9.99 - 19.99 640 12.63				9.99 - 12.99 290 12.23			
serves 15-20					29.99 1,070 29.99				20.99 - 35.99 220 33.23				15.99 - 20.99 110 18.92				39.99 10 39.99				39.99 - 49.99 10 44.99			
serves 20-30					33.99 1,070 33.99				25.99 - 46.99 190 42.38				24.99 50 24.99											

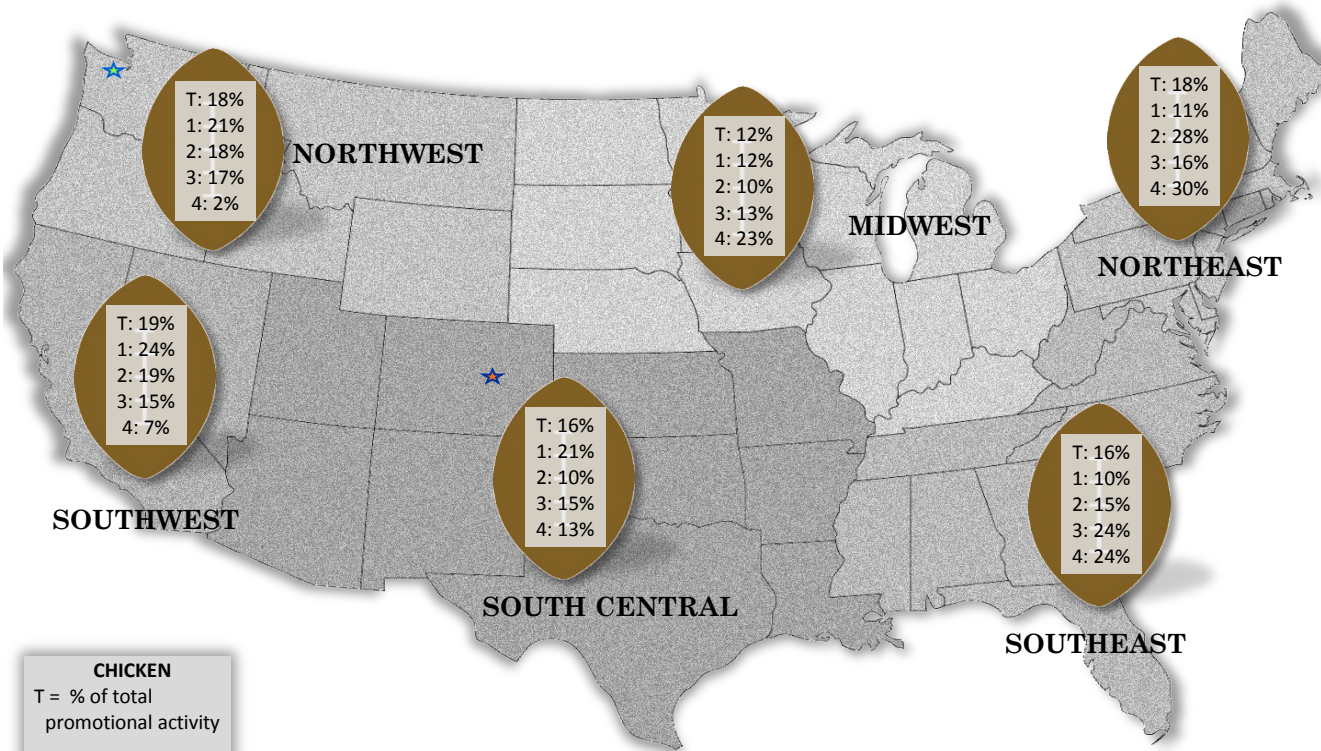
REPORT NOTES

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

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.

Regional Game Day Favorites

The big game has arrived, the biggest, non-holiday eating event of the year in the U.S., and consumers have a dizzying array of finger foods to choose from for their game celebrations. Chicken, in a variety of forms, remains the traditional favorite and offerings are up from last year, as are average ad prices. Fresh wings are back following last year's shortage with three times more on offer and priced to move with average ad prices 13% less per pound than in 2013. The Northeast, site of the big game, leads the nation in fresh wing preference as the locals prefer to treat their party guests to their own special wing recipes. At the same time, offerings of deli-prepared wings are down slightly from last year but rotisserie bird offerings are almost double from 2013 and priced slightly lower. Fried and baked chicken continue to be crowd favorites with the West Coast leading the nation in preference. Nationally, average ad prices for fried and baked chicken are up 5% from last year. Denver Bronco fans, located in the South Central region, prefer fried and baked chicken, particularly in bulk packs of 100, 150, 200, and 500 or more. Southeastern celebrants prefer to let the supermarkets do the work and is the dominate region in preference for prepared wing platter offerings. This trend is seen for all types of store-prepared party platters with the Southeast overwhelmingly leading the nation in preference for all but pork sparerib platters. Of the non-chicken platters offered by stores, cheese platters are the dominate favorites followed by veggie, fruit, and deviled egg platters. Rivaling chicken as game day favorite finger food are spareribs in varying forms. Baby backribs are the runaway favorite in this category with nearly twice the level of offers as other pork rib forms. The Northwest, home of the Seattle Seahawks, leads the nation in preference for sparerib offerings followed closely by the Southwest. While Seahawks fans like fresh spareribs, they really like store cooked slabs of spareribs and hold a significant preference for these over the rest of the country. Pork rib platters are their second favorite. Sports fans on the East Coast prefer boneless pork rib offerings while their counterparts along the West Coast prefer the bone-in selections. The Midwest does not lead the nation in any of the game day favorites reported here but they prefer baked chicken over fried, frozen wings over fresh, and pork rib, deviled egg, and veggie platters. Other items are also popular with fans including shrimp platters and avocados for guacamole dips. Not to be outdone, restaurants of all kinds are offering game day promotions to fans across the nation. Regardless of the outcome of the game, consumers across the nation will be winners as will be American farmers.



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

Category Popularity Ranking by Region						
Game Day Favorites by Regional Preference						
Ranking	NE	SE	MW	SC	SW	NW
All Chicken	18%	16%	12%	16%	19%	18%
All Fried/Baked	11%	10%	12%	21%	24%	21%
Fried 8-piece	18%	9%	13%	13%	21%	26%
Baked 8-piece	1%	17%	20%	19%	30%	13%
Bulk Packs	10%	10%	12%	24%	24%	21%
Prepared Platters	28%	15%	10%	10%	19%	18%
Fresh Wings	32%	28%	11%	12%	2%	14%
Frozen Wings	31%	9%	20%	13%	23%	4%
All Spareribs	16%	13%	11%	13%	23%	24%
Spareribs	9%	23%	4%	19%	22%	24%
Backribs	14%	11%	16%	13%	25%	21%
Country, bn-in	27%	14%	12%	17%	21%	9%
St. Louis	25%	13%	11%	17%	19%	15%
Deli ribs, \$/lb	9%	2%	5%	11%	35%	39%
Deli ribs, \$/slab	15%	8%	9%	15%	17%	36%
Other Platters	19%	27%	13%	14%	11%	17%
Pork Rib	1%	9%	18%	24%	23%	26%
Cheese	23%	30%	8%	10%	10%	19%
Veggie	17%	25%	17%	17%	10%	14%
Fruit	18%	24%	16%	15%	10%	16%
Deviled Egg	13%	31%	17%	12%	13%	13%