



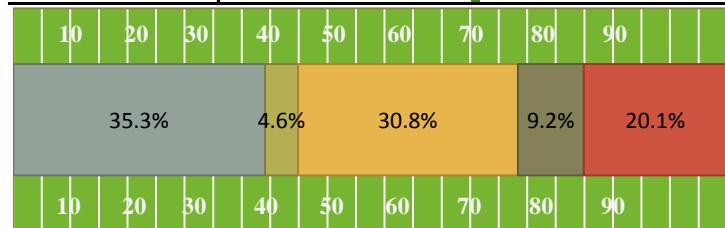
Supermarket Advertising for Super Bowl Sunday 2016

Advertised Prices for Consumer Game Day Favorites at Major Retail Supermarket Outlets Leading up to Sunday, February 07, 2016
(conventional product; prices in dollars per pound unless otherwise noted)

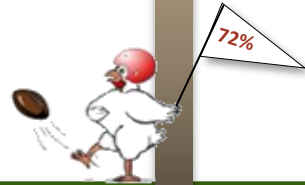
February 05, 2016

Year-to-Year Comparison	Avg. Ad Price		Feature Rate	
	2016	2015	2016	2015
Chicken Items				
Fried/Baked:				
8-pack, Fried	6.97	7.37	11,290	13,730
8-pack, Baked	7.04	7.74	6,620	4,040
8-pack, Dark, frd/bkd	4.96	5.28	1,390	1,950
12-pack, fried/baked	11.26	10.64	3,350	3,360
24-pack, fried/baked	24.08	23.65	8,310	11,490
50-pack, fried/baked	45.21	46.91	15,250	14,270
100-pack, fried/baked	86.34	90.23	13,530	12,310
Bulk Pack (\$/piece)	0.89	0.88	11,580	14,220
Deli Wings:bone-in				
	5.64	5.49	20,700	17,290
boneless	5.42	4.98	3,290	4,500
Tenders				
	6.39	5.92	6,870	5,140
Rotisserie < 2 Lb				
	6.22	6.15	9,680	4,420
Fresh Wings				
	2.36	2.45	9,330	10,570
IQF Wings				
	2.37	2.42	9,720	10,700
IQF Party Wings				
	3.06	2.79	8,960	10,020

Chicken Platters (price per unit)				
Bone-in Wings				
serves 8-10	25.32	23.92	12,580	23,360
serves 10-15	38.19	39.13	14,520	14,890
serves 20-25	50.47	50.31	5,720	6,660
Boneless Wings				
serves 8-10	25.73	22.38	5,190	8,570
serves 10-15	36.16	37.88	3,090	2,940
serves 20-25	56.15	53.62	650	1,080
Tenders				
serves 8-10	28.73	25.15	7,860	9,240
serves 10-15	40.14	39.58	6,690	8,020
serves 20-25	54.24	55.25	5,910	5,220



	2016	2015
Activity Rate ²		
All Chicken	202,080	217,990
All Pork	45,305	51,336
Platters	243,600	101,130
Feature Rate		
All Chicken	92.7%	74.0%
All Pork	72.3%	75.6%
Platters	42.1%	62.2%
Activity Ratio		
All Chicken	7:1	7:1
All Pork	2:1	2:1
Platters	8:1	3:1
Overall	16:1	13:1
Sample	30,100	29,600



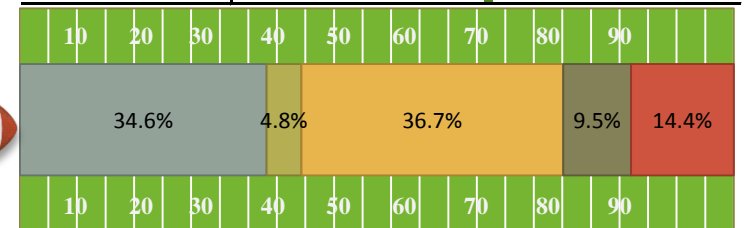
Percentage of sampled stores associating Chicken with the Big Game in their ads.

Chicken Category Comparison

- Fried/Baked
- Fresh Wings
- Platters
- Frozen Wings
- Deli Chkn



Year-to-Year Comparison	Avg. Ad Price		Feature Rate	
	2016	2015	2016	2015
Pork Items				
Pork Ribs:				
Spareribs	2.10	2.42	5,292	8,252
Backribs	3.35	3.42	14,013	13,783
Country, bone-in	1.76	2.38	7,372	9,982
St. Louis	2.77	2.89	11,193	9,913
Deli Ribs, per lb..	5.84	5.96	1,045	1,195
Deli Ribs, slab (each)	11.39	10.74	4,081	5,431
Pork Platters (price per unit)				
Pork Ribs				
serves 8-10	24.96	26.10	2,110	2,570
serves 10-15	30.81	51.69	170	130
serves 20-25	79.52	63.03	30	80
Cheese				
serves 10-15	35.01	29.52	31,870	15,590
serves 15-20	45.63	44.29	30,000	16,830
serves 25-30	55.67	56.67	19,510	10,780
Vegetable				
serves 10-15	27.59	23.24	8,310	10,810
serves 15-20	34.81	33.53	9,080	8,780
serves 25-30	42.28	41.79	6,540	7,170
Fruit				
serves 10-15	32.08	24.47	10,840	8,140
serves 15-20	42.58	36.41	11,230	9,020
serves 25-30	55.14	47.94	6,910	5,450
Deli Meats				
serves 10-15	15.53		37,900	
serves 15-20	27.86		46,090	
serves 25-30	34.98		25,320	



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

Advertised Prices to Consumers at Major Retail Supermarket Outlets Leading up to Sunday, February 07, 2016

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,KY,MS,NC,SC,TN,VA,WV)</small>				MIDWEST U.S. <small>(IA,IL,IN,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>			
Regional Sample	5,400 stores				8,200 stores				5,700 stores				5,900 stores				3,300 stores				1,600 stores			
Feature Rate ¹	96.9%				95.9%				95.1%				88.4%				83.1%				88.9%			
Activity Rate ²	99,020				169,400				78,620				78,140				39,220				21,270			
Activity Ratio ³	18:1				23:1				13:1				14:1				12:1				14:1			
	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	5.00 - 11.49	2,680	7.39		5.49 - 9.99	2,740	6.54		4.99 - 10.99	1,590	7.09		5.49 - 8.99	1,970	6.94		4.99 - 9.99	1,770	6.75		5.99 - 10.49	540	7.55	
8-pack, Baked	5.00 - 8.99	390	7.39		6.00 - 7.99	1,550	6.71		4.99 - 10.99	1,520	7.01		5.99 - 8.99	1,560	7.29		5.99 - 8.99	1,220	6.78		6.99 - 8.99	380	8.02	
8-pack, Dark, frd/bkd	3.99 - 5.99	400	4.95		3.50 - 5.00	230	4.12		3.99 - 8.99	360	4.69		3.50 - 7.89	200	5.56		5.00 - 5.99	10	5.59		4.99 - 6.99	190	5.85	
12-pack, fried/baked	7.99 - 18.74	1,410	11.72		9.75 - 11.99	110	10.89		8.38 - 15.99	560	11.49		8.99 - 13.39	470	11.45		8.99 - 15.99	460	10.63		8.48 - 12.00	340	9.76	
24-pack, fried/baked	20.38 - 33.00	510	23.70		16.99 - 26.99	2,880	22.62		14.98 - 33.12	1,110	24.57		22.99 - 26.99	2,050	24.94		19.99 - 27.99	1,190	26.52		21.99 - 25.99	570	22.61	
50-pack, fried/baked	32.99 - 60.00	1,830	44.25		32.99 - 51.00	4,100	44.49		32.99 - 69.99	3,360	45.25		33.99 - 52.99	2,990	48.18		32.99 - 50.99	1,920	44.95		38.99 - 47.99	1,050	41.58	
100-pack, fried/baked	69.99 - 120.00	1,420	84.15		64.99 - 99.99	4,000	80.93		64.99 - 119.99	3,180	86.76		79.99 - 105.99	2,800	95.83		64.99 - 99.99	1,480	86.08		76.99 - 95.99	650	82.03	
Bulk Pack (\$/piece)	0.80 - 0.96	870	0.85		0.65 - 1.00	2,370	0.90		0.62 - 1.10	850	0.89		0.65 - 1.06	4,990	0.91		0.70 - 1.07	1,700	0.88		0.76 - 1.07	800	0.85	
DELI-PREPARED CHICKEN (per pound)																								
Wings: bone-in	3.33 - 9.99	4,190	5.98		2.98 - 6.99	5,500	5.63		2.99 - 8.99	4,020	5.65		2.59 - 4.39	4,270	5.32		2.99 - 7.49	1,750	5.68		2.98 - 7.99	970	5.48	
boneless	4.00 - 7.97	900	5.65		2.99 - 6.99	310	5.16		3.00 - 6.99	1,120	5.12		3.00 - 6.99	440	5.45		3.77 - 6.99	430	5.77		4.99 - 6.49	90	5.79	
Tenders	4.99 - 9.99	1,870	6.43		3.99 - 7.99	2,650	6.55		3.60 - 7.99	590	6.01		5.99 - 7.99	700	6.81		4.99 - 6.99	760	5.83		3.99 - 7.99	300	5.91	
Whl Rotisserie <2 Lb	3.99 - 7.99	2,160	5.81		3.99 - 9.99	4,370	6.19		3.99 - 8.99	890	6.48		4.88 - 6.99	590	6.36		4.99 - 7.99	990	6.38		5.00 - 7.99	680	7.01	
CHICKEN PLATTERS/TRAYS (price per unit)																								
Bone-in Wing																								
serves 8-10	14.99 - 49.99	1,220	27.74		18.99 - 50.00	6,060	25.57		16.00 - 49.99	2,220	24.67		16.99 - 49.99	1,920	24.45		16.99 - 34.99	810	24.80		16.99 - 39.99	350	22.68	
serves 10-15	29.99 - 69.99	1,780	42.33		29.99 - 69.99	7,990	37.95		26.99 - 69.99	1,250	38.00		29.99 - 49.99	2,100	38.01		37.99 - 54.99	590	39.90		24.99 - 69.99	810	31.06	
serves 20-25	49.99 - 85.00	1,070	67.17		40.99 - 85.00	3,780	45.00		39.99 - 64.95	170	57.53		38.97 - 109.95	650	51.07		54.99 - 87.99	20	78.53		49.99 - 99.99	30	72.72	
Boneless Wings																								
serves 8-10	24.99 - 34.99	700	33.86		24.99 - 34.99	1,100	25.53		12.95 - 24.99	1,420	23.28		12.95 - 24.99	1,430	24.61		24.99	310	24.99		24.99	230	24.99	
serves 10-15	34.99 - 55.00	170	48.59		26.99 - 39.99	790	35.37		26.99 - 39.99	540	36.31		21.97 - 39.99	850	37.96		37.99 - 39.99	260	39.65		24.99 - 37.99	480	27.82	
serves 20-25	54.99 - 95.00	540	55.44		54.99	60	54.99		49.99 - 78.00	20	69.09		49.99 - 74.99	30	62.58									
Tenders																								
serves 8-10	29.99 - 39.99	1,140	39.20		22.99 - 40.00	4,550	27.63		19.99 - 39.99	920	26.00		24.99 - 29.99	780	25.24		24.99	260	24.99		24.99 - 29.99	210	25.25	
serves 10-15	24.99 - 55.00	250	47.31		34.95 - 70.00	3,910	40.95		29.99 - 59.99	1,010	38.30		34.99 - 39.99	920	39.08		37.99 - 39.99	390	39.76		29.99 - 37.99	210	30.82	
serves 20-25	50.00 - 95.00	1,060	62.63		44.95 - 99.00	4,650	51.87		39.99 - 75.00	190	65.76		47.97	10	47.97									
CHICKEN WINGS - Fresh and Frozen																								
Fresh Wings	0.99 - 3.29	2,040	2.25		1.44 - 2.99	5,050	2.42		1.29 - 2.99	1,280	2.33		1.60 - 2.79	750	2.29		1.49 - 3.19	130	2.38		2.49 - 2.99	80	2.96	
IQF Wings	1.50 - 3.20	3,510	2.31		1.50 - 3.45	1,710	2.25		1.60 - 3.45	2,070	2.38		1.98 - 3.20	1,010	2.40		1.99 - 2.80	970	2.44		1.68 - 3.33	450	3.06	
IQF Party Wings	1.60 - 4.33	1,140	2.80		1.58 - 4.33	2,850	3.03		1.58 - 4.33	1,800	3.19		1.99 - 4.33	2,070	3.20		2.00 - 3.75	590	2.82		1.68 - 3.75	510	3.14	

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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,KY,MS,NC,SC,TN,VA,WV)</small>				MIDWEST U.S. <small>(IA,IL,IN,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	
PORK SPARERIBS - Fresh and Prepared																								
Spareribs	1.79 - 3.19	1,140	2.37		1.48 - 2.49	1,040	1.98		1.69 - 2.99	370	2.15		1.95 - 2.49	990	1.98		1.57 - 2.99	1,420	2.00		1.98 - 2.99	330	2.29	
Backribs	2.49 - 4.99	2,570	3.55		2.49 - 4.99	3,360	3.58		1.99 - 4.99	2,230	3.16		1.77 - 2.97	2,380	3.05		2.77 - 4.99	2,490	3.35		2.49 - 3.99	980	3.16	
Country, bone-in	0.97 - 2.49	1,590	1.80		0.90 - 2.49	980	1.72		0.99 - 2.48	1,250	1.68		0.77 - 1.48	1,670	1.50		0.87 - 2.49	1,100	1.70		1.29 - 2.99	780	2.52	
St. Louis	0.99 - 4.99	1,880	2.72		1.99 - 4.49	3,990	2.82		2.49 - 3.49	1,900	2.59		1.77 - 3.69	1,340	2.55		2.77 - 3.99	1,580	3.17		1.99 - 3.99	500	2.51	
Deli Ribs, per lb..	5.00 - 10.99	390	6.51		5.00	5.00			3.99 - 8.99	330	4.99		3.99 - 5.59	190	5.03		5.99	30	5.99		4.98 - 8.99	100	7.49	
Deli Ribs, slab (each)	10.00 - 13.99	500	12.12		9.99 - 22.00	860	10.49		8.99 - 14.88	820	11.45		8.00 - 16.99	980	11.19		11.99	400	11.99		8.99 - 17.00	510	12.07	
PORK PLATTERS/TRAYS (price per unit)																								
Pork Ribs																								
serves 8-10					24.99	580	24.99		19.98 - 24.99	520	24.86		24.99	670	24.99		24.99	260	24.99		24.99	80	24.99	
serves 10-15	45.00 - 65.00	20	59.29										29.99 - 44.99	20	37.49						24.99 - 29.99	130	25.41	
serves 20-25	75.00 - 95.00	20	89.29										59.99	10	59.99									
OTHER POPULAR PLATTERS/TRAYS⁷ (price per unit)																								
Cheese (sliced or cubed)																								
serves 10-15	19.99 - 54.99	7,510	41.19		19.99 - 55.00	9,860	32.36		14.99 - 60.00	5,620	31.65		14.99 - 28.99	5,180	33.92		14.99 - 69.99	2,280	36.59		24.99 - 59.99	1,420	35.41	
serves 15-20	29.99 - 79.99	5,310	51.73		22.99 - 80.00	11,630	40.46		22.99 - 90.00	5,460	44.33		26.97 - 38.97	3,930	48.64		29.99 - 79.99	2,000	53.09		36.99 - 89.99	1,670	50.42	
serves 20-30	49.99 - 99.99	3,390	70.16		32.99 - 99.00	7,890	47.82		32.99 - 130.00	4,490	59.43		29.99 - 59.99	2,630	50.26		39.99 - 129.99	840	58.94		49.99 - 129.99	270	82.92	
Vegetable																								
serves 10-15	16.99 - 39.99	2,080	25.74		22.99 - 39.99	1,750	25.79		19.99 - 57.99	1,270	28.13		24.99 - 44.99	1,880	27.66		24.99 - 39.99	830	30.55		24.99 - 49.99	500	34.97	
serves 15-20	22.99 - 59.99	2,320	34.84		24.99 - 59.99	3,560	31.17		22.99 - 61.99	1,440	38.02		24.99 - 55.99	1,290	36.99		29.99 - 49.99	340	44.58		29.99 - 89.99	130	51.16	
serves 20-30	26.99 - 70.00	1,220	39.03		34.99 - 59.99	3,350	39.27		29.95 - 70.00	1,080	48.33		38.99 - 69.99	780	50.30		49.99 - 69.99	60	56.90		39.99 - 58.99	50	49.25	
Fruit																								
serves 10-15	19.99 - 59.99	2,300	29.66		19.99 - 49.99	2,840	30.82		19.99 - 60.00	1,560	33.24		21.99 - 44.99	2,450	32.32		24.99 - 64.99	1,190	34.35		29.99 - 54.99	500	40.20	
serves 15-20	29.95 - 59.99	1,930	41.51		29.99 - 59.99	5,150	40.31		29.95 - 75.00	1,570	45.20		30.99 - 49.99	1,560	42.36		29.99 - 79.99	720	51.19		35.99 - 79.99	300	55.39	
serves 20-30	35.99 - 79.99	1,730	52.51		29.95 - 79.99	2,910	54.35		29.95 - 99.99	1,050	57.53		36.99 - 99.99	980	52.62		64.99 - 99.99	200	84.12		49.99 - 109.99	40	81.15	
Deli Meats (may include sliced cheese)																								
serves 10-15	24.99 - 69.99	14,760	46.73		22.99 - 54.99	6,910	40.17		21.99 - 60.00	5,300	35.73		25.00 - 55.99	6,810	40.29		24.99 - 69.99	2,980	39.73		29.99 - 59.99	1,140	35.14	
serves 15-20	32.99 - 89.99	9,540	59.96		24.99 - 69.99	19,390	49.05		24.99 - 71.76	6,110	47.99		34.99 - 64.99	6,170	46.73		29.99 - 69.99	2,740	46.98		34.99 - 109.99	2,140	46.13	
serves 20-30	42.99 - 169.99	6,710	79.41		39.99 - 74.99	11,080	58.68		34.95 - 99.99	4,580	59.05		29.99 - 89.99	1,670	52.59		47.99 - 129.99	1,170	58.12		52.99 - 129.99	110	61.03	

REPORT NOTES

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

¹ **FEATURE RATE:** the percentage of sampled stores advertising any reported item during the covered period, expressed as a percentage of the total regional sample.

² **ACTIVITY RATE:** the regional sum of each sampled supermarket's store count multiplied by the number of reported items they are advertising. (e.g., a retailer with 100 outlets featuring 3 chicken

items has an activity of 300). ³ **ACTIVITY RATIO:** the number of advertised items offered per store (*activity rate/regional sample*). **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

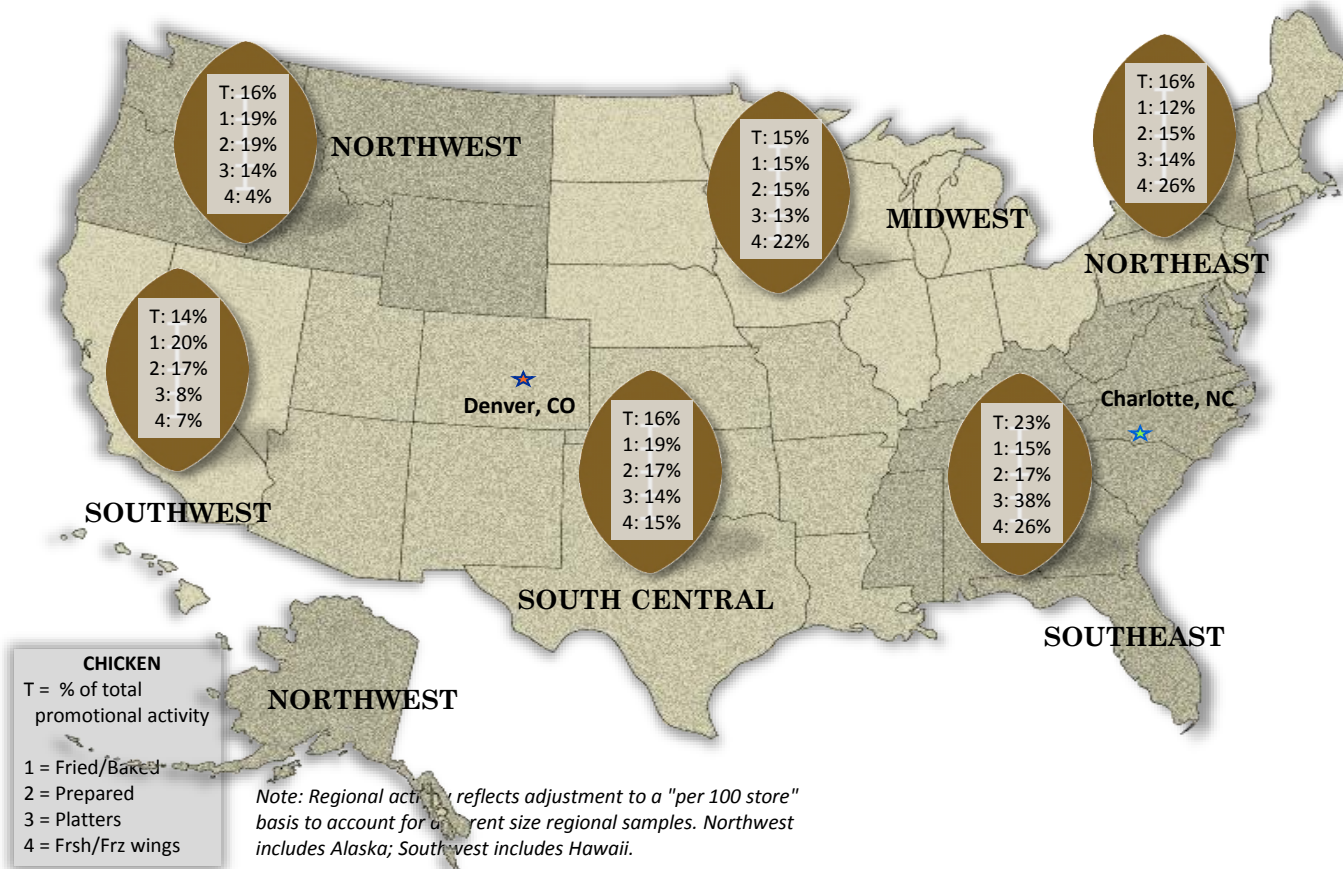
to 16 piece price). ⁵ frozen wings are IQF in bags converted to a per pound basis. ⁶ frozen party wings are pre-cooked and packed IQF in bags. DOES NOT include pre-cooked and seasoned, IQF products.

⁷ Platters only include store-prepared offerings.

Game Day Consumption Trends

On February 7, 2016, the 50th annual National Football League Championship game will be played at Levi's Stadium in Santa Clara, CA. The date not only marks the crowning of an ultimate football champion, it also marks what has come to be the most significant non-holiday eating event on the calendar. From its inception, the big game has served as the perfect opportunity for fans, and non-fans alike, to gather, some to enjoy the game, others the commercials, and all the delicious food. Unlike Thanksgiving, the biggest holiday eating event, Championship Sunday takes place largely in front of the TV so it is not surprising that the most popular foods lend themselves well to eating with the hands, finger food as it has come to be known. For 50 years, chicken wings have dominated the finger food category – perfectly sized, versatile to prepare, relatively low cost, and widely available. This year is no different with chicken, in a variety of forms, leading all competitive meat proteins. This is especially true of fans in the Southeast, home of the NFC champion Carolina Panthers, which leads the nation in preference for chicken, particularly for fresh wings with 43 percent of the national market. Fans in the South Central region, home to the AFC champion Denver Broncos, prefer their chicken baked and in bulk packs. But chicken's dominance is increasingly threatened by a host of rivals, particularly the pork rib, also a perfect finger food that is inexpensive and widely available. It also has a numerical superiority over chicken wings. For every two wings per chicken, there are 26 ribs per hog. When cut into the baby back and St. Louis portions, the number of ribs for finger foods jumps to 52, a whopping 26 to 1 advantage. Chicken maintains its dominance through sheer numbers but clearly, pork ribs are a growing fan favorite. Fans in the Southwest lead the nation in preference for pork ribs with the South Central a close second. The Southeast leads the nation in a taste for St. Louis-style spareribs. But the most significant trend in game foods is the increase in "convenience" forms of chicken. Fans are increasingly opting for supermarket deli or restaurant-prepared wings over making their own from raw stock. This explains the ten percent increase in offerings of store-prepared wings and the 120 percent increase in offerings of rotisserie chicken for the 2016 game while offerings of fresh and frozen raw wings decline by 23 percent. What's more, prepared and pre-packaged chicken wings in the frozen meat case are growing in popularity, requiring only to be dumped from the box or bag and heated in the oven and store-made party platters offer a dizzying array of items and sizes to satisfy a wide range of tastes. Clearly, convenience is a growing trend that is changing chicken consumption and Big Game viewing habits.

Regional Chicken Preferences



Category Popularity Ranking by Region

Game Day Favorites by Regional Preference

Ranking	NE	SE	MW	SC	SW	NW
All Chicken	16%	23%	15%	16%	14%	16%
All Fried/Baked	12%	15%	15%	19%	20%	19%
Fried 8-piece	21%	14%	12%	14%	23%	15%
Baked 8-piece	5%	14%	19%	19%	26%	17%
Bulk Packs	10%	15%	15%	21%	19%	20%
Prepared	15%	17%	15%	17%	17%	19%
Platters	14%	38%	13%	14%	8%	14%
Fresh Wings	26%	43%	16%	9%	3%	3%
Frozen Wings	23%	15%	18%	14%	13%	16%
All Spareribs	16%	13%	13%	14%	23%	21%
Spareribs	15%	9%	4%	28%	30%	14%
Backribs	16%	13%	13%	13%	25%	20%
Country, bn-in	17%	7%	13%	16%	19%	28%
St. Louis	16%	22%	15%	10%	22%	14%
Deli ribs, \$/lb	31%		25%	14%	4%	27%
Deli ribs, \$/slab	10%	11%	15%	18%	13%	34%
Other Platters	24%	24%	16%	14%	10%	12%
Pork Rib	1%	14%	18%	24%	16%	26%
Deli Meat	29%	23%	14%	13%	11%	11%
Cheese	20%	24%	18%	13%	10%	14%
Veggie	25%	25%	16%	16%	9%	10%
Fruit	21%	26%	14%	16%	12%	10%

Note: data normalized to account for different regional sample sizes.