

## 2017 Top 50 Annual Retail Ranking of Chicken Cuts

Since 2005, USDA’s Market News service has released a weekly report covering supermarket feature activity for the most popular cuts of chicken marketed to consumers in retail outlets ([Weekly Retail Chicken Features Activity report](#)). Each year, the Agricultural Analytics Division (AAD) analyzes this data to produce an annual ranking of the most commonly featured chicken cuts featured by U.S. supermarkets in their weekly store circulars. The [2017 Top 50 Ranking of Chicken Cuts](#) report was recently released and provides the full ranking for 2017.

For the fourth consecutive year, boneless/skinless breasts (b/s breast) in value packs (generally >3 lbs.) was the most commonly featured chicken cut and pack with just over 10 percent share of the 61 individual cuts included on the Retail Chicken report. In 2011, value pack b/s breasts ranked 7<sup>th</sup> but steadily rose through the rankings to take the top spot in 2014. Regular packs of b/s breasts (< 3 lbs.) had led the rankings up to that point and have been steadily falling in the rankings, ranking 10<sup>th</sup> in 2017.

### Top 10 Featured Chicken Cuts in 2017

1	<a href="#">Bnls/Sknls Breasts - value pack</a>	10.31%
2	<a href="#">Drumsticks - value pack</a>	6.71%
3	<a href="#">Thighs - value pack</a>	6.04%
4	ABF Bnls/Sknls Breasts	5.32%
5	Fried Chicken 8-Piece Mixed	4.81%
6	Whole Bagged Fryer	3.80%
7	<a href="#">Bnls/Sknls Thighs - value pack</a>	3.79%
8	Whole Rotisserie, <2 lbs	3.55%
9	Organic Bnls/Sknls Breasts	3.01%
10	<a href="#">Bnls/Sknls Breasts - regular pack</a>	2.79%

Value packs of all popular chicken cuts have become a popular feature form for grocers to attract consumer dollars. Four of the top ten chicken cuts are offered in value pack form and together accounted for over 25 percent of supermarket featuring in 2017. Two of these four are perennial favorites – value pack drumsticks and bone-in thighs (ranked 3 and 4). These two cuts have ranked in the top four for the past 6 years, solidifying their place in 2016 as regular pack b/s breasts declined and their value pack counterparts rose.

The remaining value pack chicken cut in the top ten was boneless/skinless thighs (b/s thighs), rising 6 places to take the seventh spot. Five years ago, this cut wasn’t even in the top 25 but has grown in popularity with consumers every year to become a staple in store ads and shelves. The increase in offerings of b/s thighs has reduced the level of offerings of bone-in thighs relative to drums. In 2017, there were 11 percent fewer features for value pack bone-in thighs than for value pack drums. The disparity was even greater for regular packs with drums outpacing thighs by 25 percent. This has also affected the average advertised price. In 2011, the average ad price for bone-in thighs was one percent more than that for drums, regardless of pack size. In 2017, this relationship had increased to where the average ad price for bone-in thighs was 5 percent more than that for drums, again, regardless of pack size.

### Avg. Ad Price Comparison (\$/lb.)

Bone-in	2017		2011	
drums, value	1.01	95%	1.10	99%
thighs, value	1.06		1.11	
drum, regular	1.21	95%	1.34	99%
thighs, regular	1.28		1.35	

Another recent trend highlighted in the annual rankings is the growth of chicken cuts raised without the use of antibiotics (ABF). The [National Chicken Council](#) estimated that ABF production accounted for nearly 33 percent of U.S. young chicken production at the end of 2016. In 2017, that percentage grew to over half of all young chicken. As ABF chicken becomes more mainstream, it is becoming more common in supermarket circulars. In 2017, ABF b/s breasts rose to the 7<sup>th</sup> rank of the most commonly featured chicken cut and has seen a steady rise in recent years, a trend expected to continue moving forward for all ABF chicken cuts. While many chicken companies have developed ABF lines of chicken cuts, a growing number produce all chicken marketed under their company label as antibiotic-free. As this becomes more common and consumer awareness grows, many supermarkets no longer advertise this chicken on its antibiotic-free merits, in effect, commoditizing ABF chicken as the new “norm”.

Finally, for the first time since this data was first collected in 2005 (one year after the organic standards were promulgated), an organic chicken cut, b/s breasts, made it to the top 10 chicken cuts featured by supermarkets. At a 3 percent of ad share, organic b/s breasts rose 7 places since 2016. However, organic chicken cuts in general have not enjoyed broad or regular retail promotional activity.

