

# Retail Pricing Insights Report: Benchmarking Your Price Position on KVs



As pricing becomes more scrutinized in today's volatile market, retailers need clear, data-driven insights to remain competitive. This report was designed to help you evaluate how your pricing on **Key Value Items (KVs)**—the essential products that shape consumer price perception—compares against competitors across regions.

Using RDSolutions' [Market Intelligence Platform](#), this report analyzes pricing trends across **9 U.S. geographic divisions**, spotlighting areas of opportunity, gaps in value perception, and alignment with regional price expectations. From national retailers to discount and club formats, our insights help you make informed decisions that protect margin, preserve customer trust, and stay ahead of market shifts—especially as tariffs and inflation begin to impact basket costs.

To provide a robust view of pricing dynamics across the country and regionally, we sought to include both well known national retailers such as Walmart and Kroger along with well respected regional grocers in each of the markets represented.

## What's Inside the Report

### KVI Price Index by Region

A regional benchmark of Key Value Items (KVs)—the products most influential to consumer price perception—across nine U.S. divisions. This index reveals where pricing leads or lags the market and how it aligns with local expectations, offering insight into broader promotional and margin strategies within the grocery sector.

### Retailer vs. Regional Index Comparisons

National and regional comparisons highlight pricing patterns across leading retailers and local players. Side-by-side indices reveal geographic price differences, category-level inconsistencies, and emerging trends by product type, offering a clearer view of competitive positioning across the country.

### Spotlight: Protein Price Trends

#### Split the Basket

Beef and egg prices are moving in opposite directions, reflecting a widening gap in protein inflation. Ground beef remains costly amid supply constraints, while egg prices have dropped sharply after last year's avian flu recovery. Retailers are adjusting cautiously, with value leaders like Aldi holding steady. This report explores how these trends are impacting budgets and promotions in late 2025.

### Data Integrity & Matching

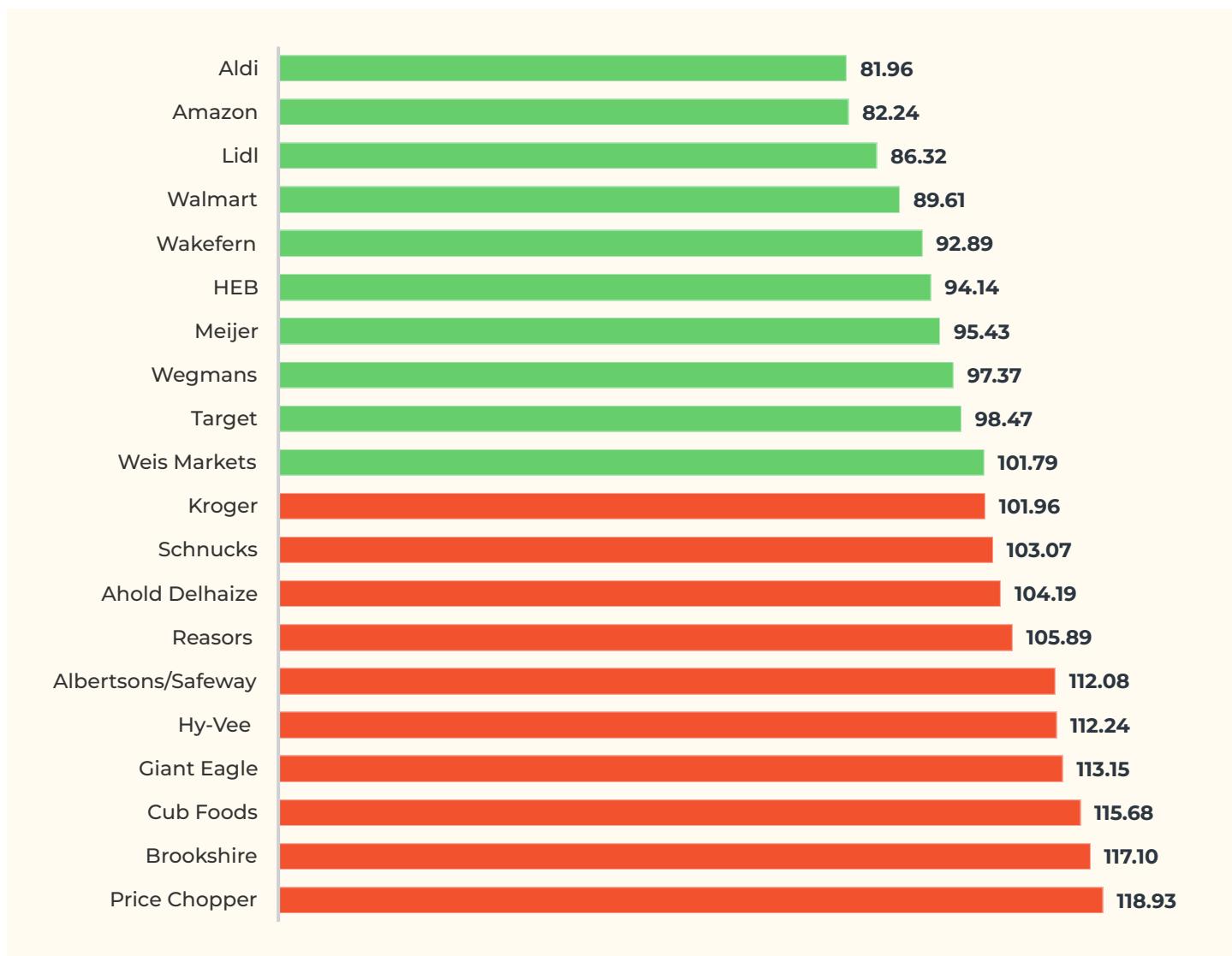
#### Methodology

To maintain high standards of accuracy and relevance, the analysis relies on exact, like-for-like product comparisons. Where direct matches are unavailable, proprietary linking methods are used, based on functional equivalence and consumer purchasing behavior. Standardized opening price points are often included to reflect the way shoppers evaluate prices both in-store and online.

## National Price Index Summary

This table reflects the **average index scores** for each retailer across all divisions, captured during the month of **July 2025**. Index scores are calculated by comparing item-level pricing across all participating retailers, with a score of **100** representing the average market price.

An index **below 100** indicates pricing **below market** (more price competitive), while an index **above 100** signals **higher-than-market prices**.



Aldi once again claims the lowest national price index in July, narrowly edging out Amazon and Lidl to remain the most value-driven grocery retailer in the U.S. Amazon's position at #2 highlights its continued push for price competitiveness, despite its more limited physical footprint. Lidl and Walmart follow closely behind, reinforcing the strength of discount and mass retail formats in delivering price value to consumers.

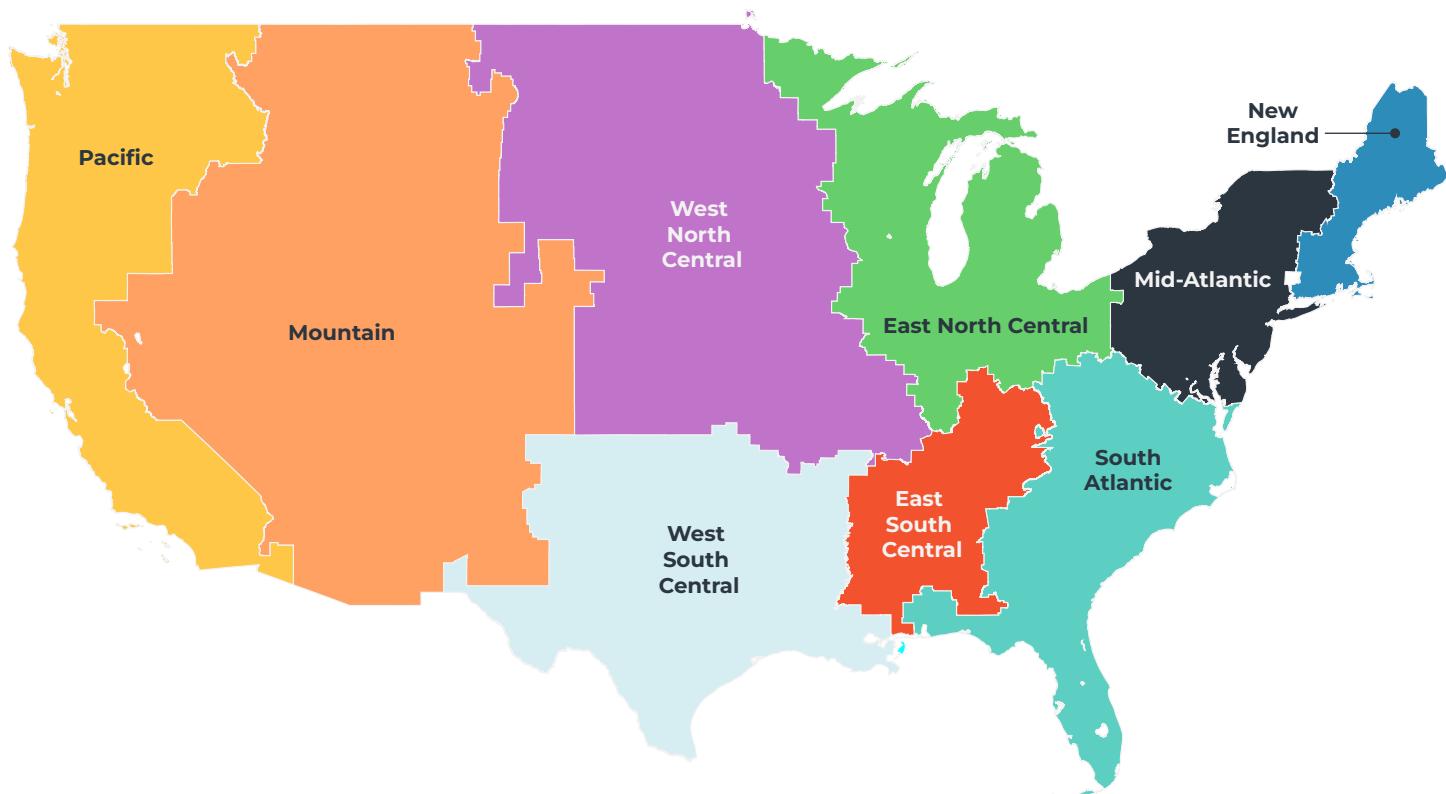
Wakefern, HEB, Meijer, and Wegmans make up the middle tier, maintaining moderately competitive price points, while Target and Weis Markets round out the national average range.

Notably, Kroger has crossed the 100 index mark, signaling a shift toward higher pricing compared to previous months. Conventional and regional grocers such as Schnucks, Ahold Delhaize, and Reasors are trending higher on the price index. At the upper end of the pricing spectrum are Albertsons/Safeway, Hy-Vee, and Giant Eagle—with Cub Foods, Brookshire, and Price Chopper posting the highest index values, topping out at 118.93.

These trends continue to highlight the widening price gap between value-focused retailers and conventional grocers.

## SuperKVI Price Index Summary by Division

The divisional delineation used to establish our 9 regional markets is based on a common view considered across the industry to be a reasonable standard. These 9 markets consider commonality of consumers and competitive retailer store footprints to maximize the value in considering comparative indexes.



**From national retailers to discount and club formats, our insights help you make informed decisions that protect margin, preserve customer trust, and stay ahead of market shifts—especially as tariffs and inflation begin to impact basket costs.**

## SuperKPI Price Index Summary by Division

Retailer	National Index	Pacific	Mountain	West North Central	West South Central	East North Central	East South Central	New England	Mid-Atlantic	South Atlantic
Aldi	<b>81.96</b>	<b>78.65</b>	<b>82.16</b>	<b>81.53</b>	<b>80.32</b>	<b>78.71</b>	<b>89.64</b>	<b>82.74</b>	<b>83.83</b>	<b>81.50</b>
Amazon	<b>82.24</b>	<b>80.04</b>	<b>87.78</b>			<b>80.45</b>			<b>81.04</b>	
Lidl	<b>86.32</b>								<b>86.33</b>	<b>86.31</b>
Walmart	<b>89.61</b>	<b>87.97</b>	<b>89.65</b>	<b>87.17</b>	<b>92.45</b>	<b>87.44</b>	<b>95.02</b>	<b>88.76</b>	<b>87.01</b>	<b>91.60</b>
Wakefern	<b>92.89</b>							<b>93.99</b>	<b>91.75</b>	
HEB	<b>94.14</b>				<b>94.14</b>					
Meijer	<b>95.43</b>					<b>92.16</b>	<b>99.01</b>			
Wegmans	<b>97.37</b>							<b>97.11</b>	<b>96.45</b>	<b>98.67</b>
Target	<b>98.47</b>	<b>92.96</b>	<b>97.78</b>	<b>96.33</b>	<b>100.67</b>	<b>96.14</b>	<b>105.65</b>	<b>99.56</b>	<b>97.89</b>	<b>100.31</b>
Weis Markets	<b>101.79</b>								<b>101.79</b>	
Kroger	<b>101.96</b>	<b>101.31</b>	<b>99.38</b>	<b>98.46</b>	<b>104.23</b>	<b>102.64</b>	<b>107.70</b>		<b>105.52</b>	<b>107.19</b>
Schnucks	<b>103.07</b>			<b>102.35</b>		<b>103.80</b>				
Ahold Delhaize	<b>104.19</b>						<b>102.40</b>	<b>107.52</b>	<b>102.62</b>	<b>105.94</b>
Reasons	<b>105.89</b>				<b>105.89</b>					
Albertsons/Safeway	<b>112.08</b>	<b>112.99</b>	<b>112.65</b>	<b>106.95</b>	<b>110.38</b>	<b>124.61</b>		<b>107.47</b>	<b>111.54</b>	
Hy-Vee	<b>112.24</b>			<b>112.02</b>		<b>112.47</b>				
Giant Eagle	<b>113.15</b>					<b>110.60</b>			<b>114.19</b>	<b>114.72</b>
Cub Foods	<b>115.68</b>			<b>115.68</b>						
Brookshire	<b>117.10</b>				<b>117.10</b>					
Price Chopper	<b>118.93</b>							<b>118.74</b>	<b>119.10</b>	

This chart reflects **regional price positioning** for each retailer based on a 35-item **KVI basket** (provided below)—the key value items most likely to influence consumer price perception. Index scores are shown by division, with **100 representing the market price** in each region.

- Retailers with index scores consistently above 110 may face price perception risks, especially on items that heavily influence shopper trust and loyalty.
- Use this data to:
  - Benchmark regional competitiveness
  - Identify gaps vs. discount leaders
  - Inform pricing and promotional adjustments by geography

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#### 35-item KVI basket

Product List	Pack	Size	UoM
Large White Eggs	1	12	ct
Salted Butter	1	16	oz
2% Milk	1	128	fl oz
Sliced Medium Cheddar Cheese	1	8	oz
Bananas	1	1	lb
Strawberries	1	1	lb
Creamy Peanut Butter	1	16	oz
White Round Top Bread Loaf	1	20	oz
Homestyle Vanilla Ice Cream	1	48	fl oz
Regular Cut French Fried Potatoes	1	32	oz
Coca Cola Regular 12 pack	12	12	fl oz
Purified Drinking Water 24 pack	24	16.9	fl oz
Simply Orange Juice NFC	1	52	fl oz
Lays Original Potato Chips	1	8	oz
Bar S Classic Fully Cooked Franks, 8ct	1	12	oz
Private Label Spaghetti	1	16	oz
Sugar	1	4	lb
Flour	1	5	lb

Product List	Pack	Size	UoM
Oreo Chocolate Cookie Sandwich	1	13.29	oz
Campbell's Condensed Chicken Noodle Soup	1	10.75	oz
Vegetable Oil	1	48	fl oz
Frozen Sweet Peas	1	12	oz
Hot Dog Buns 8 ct	1	11	oz
Cut Green Beans Canned	1	14.5	oz
Chicken Broth	1	32	fl oz
Frozen Blueberries	1	16	oz
Cream Cheese Block	1	8	oz
Concord Grape Jelly	1	30	oz
Salt Iodized Salt	1	26	oz
Ultra Strong Paper Towels	12	110	sheets
Ultra Strong Toilet Paper	12	242	sheets
Aluminum Foil 75sqft	1	75	sqft
Mayonnaise	1	30	fl oz
Fresh Chicken Breast	1	1	lb
80/20 Ground Beef	1	1	lb

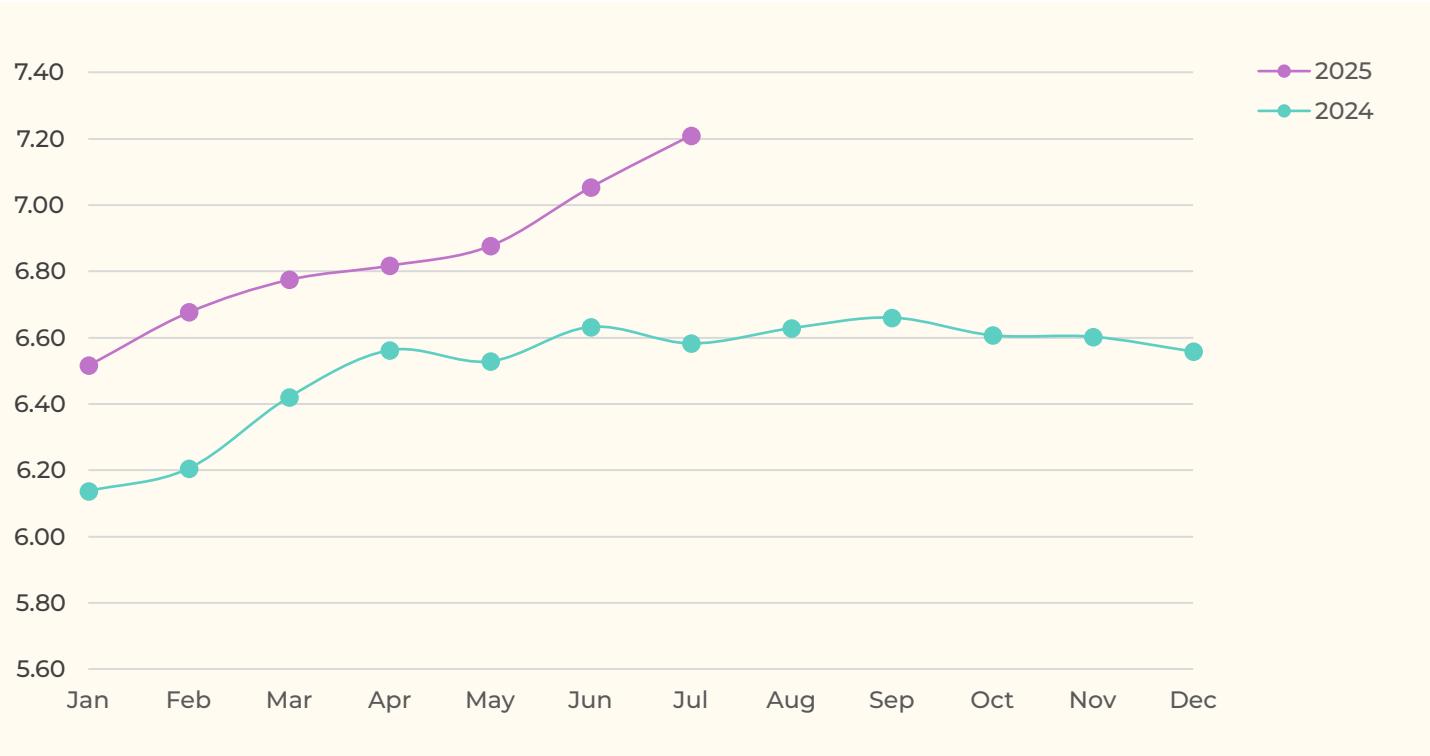


## Spotlight

### Ground Beef Prices Continue to Climb as Supply Constraints Persist

Ground beef prices in the U.S. have continued a steady upward trend in 2025, driven by long-term supply shortages. Herd sizes remain at their lowest levels in over 75 years following a 2022 drought across the Plains states, contributing to a constrained beef supply and sustained retail price inflation.

As of July 2025, the average retail price for 80/20 ground beef reached \$7.21 per pound, up from \$6.52 in January — **a 10.6% increase year to date**. This follows a relatively stable but elevated pricing environment in 2024, where average prices rose from \$6.14 in January to \$6.56 by December.



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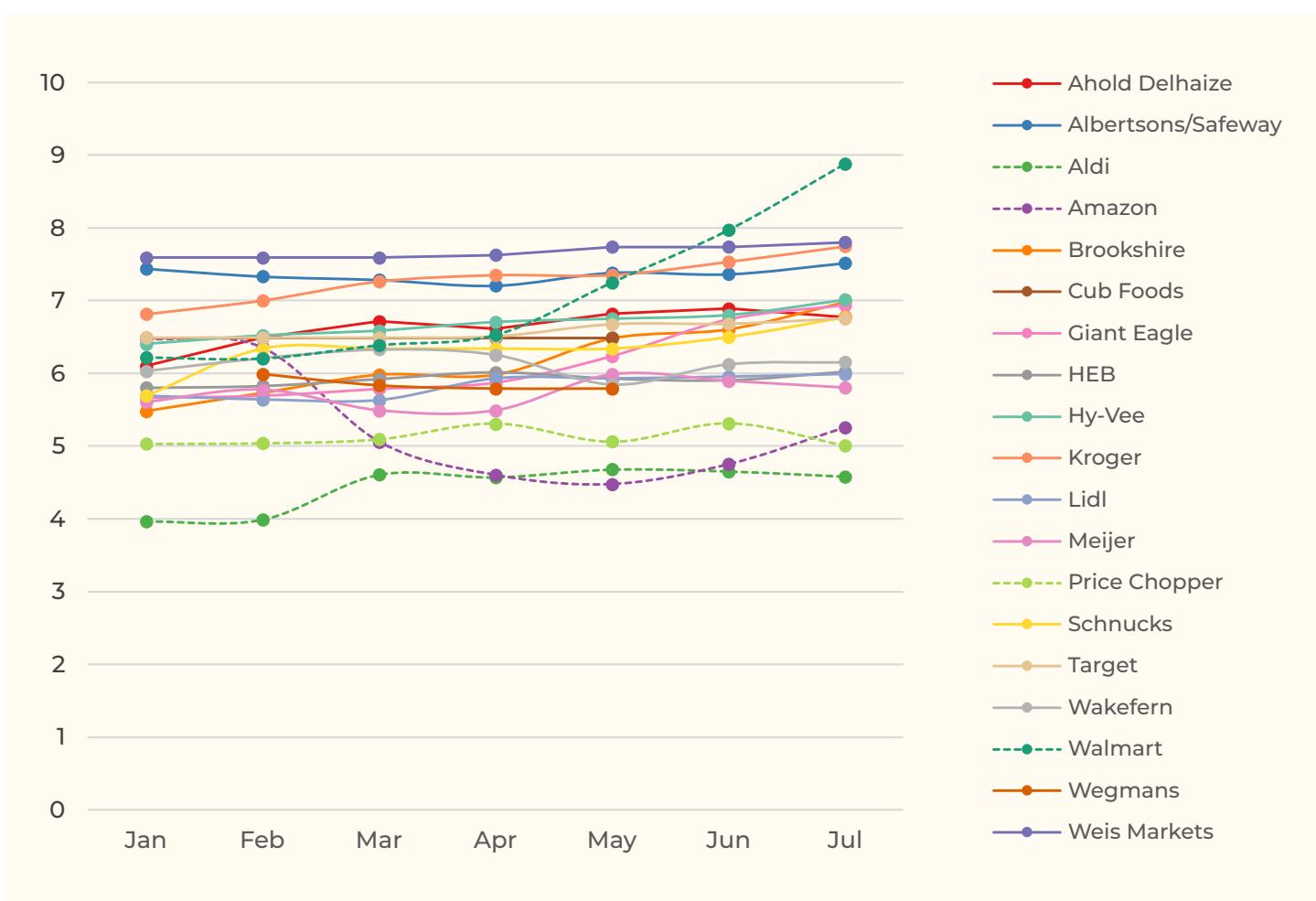
## Retailer-Level Pricing Trends: Ground Beef

RDSolutions retail pricing data indicates a broad divergence in pricing strategies among major national and regional retailers in 2025:

- **Aldi:** Increased its 80/20 ground beef price from just under \$4.00 in January to \$4.58 in July — the **lowest price** among tracked retailers. The increase occurred primarily in February, with pricing remaining stable through July. Aldi returned to the top of the KVI basket rankings in July.
- **Walmart:** Began the year at \$6.22 per pound but saw the **sharpest increase** among national retailers, reaching \$8.88 in July — **the highest price point** in our dataset.
- **Amazon:** Priced its 80/20 ground beef at \$6.48 in January, dropped to ~\$5.00 in March, aligned closely with Aldi through Q2, and ended July at \$5.25. Amazon was the KVI basket leader in June.
- **Price Chopper:** Regional data shows a unique pricing trajectory. The Schenectady, N.Y.-based retailer began the year at \$5.03 per pound, increased to \$5.30 in April, and returned to ~\$5.00 in July. This may reflect regional supply advantages or strategic pricing decisions.

Most other retailers tracked fall within the **\$5.50 to \$8.00 per pound** range, with gradual month-over-month increases across the first half of the year.

**Ground beef prices in the U.S. have continued a steady upward trend in 2025, driven by long-term supply shortages.**





## Outlook: Price Pressures Expected to Continue

Cattle futures remain elevated, and recent reports of parasite outbreaks among herds in Texas further complicate the supply-side outlook. These factors are likely to exert continued upward pressure on retail beef pricing into Q4 2025 and early 2026.

## Eggs: A Deflationary Counterpoint?

Egg prices have moved in the opposite direction, providing some relief to consumers after sharp increases caused by avian flu outbreaks in 2023 and early 2024. However, not all retailers have passed these savings along equally.

- **Private label egg prices** dropped from \$5.84 in March 2025 (vs. \$2.76 in March 2024) to \$3.29 in July (vs. \$2.74 YoY). This reflects a **43.7% drop since March**, though prices remain above pre-epidemic levels.
- **Amazon:** Maintained steady private label egg prices from April through July. Despite this, Amazon held the **highest July egg score** among all retailers in our data, based on price, availability, and product quality indicators. Its seven-month average was exceeded only by Albertsons/Safeway, Aldi, and Wegmans.

While eggs provide a temporary cost-saving opportunity, their price movement has not offset broader protein inflation — particularly in beef — for most consumers.

## APPENDIX

### Methodology for Data Selection and Index Calculation

Our approach to data selection and pricing index creation ensures that we are presenting the most accurate, consumer-relevant data for decision-making.

#### Data Selection Criteria:

- **Product Selection Strategy:** We focus on minimizing price variance driven by quality differences by prioritizing items with consistent, standardized quality across retailers. For example, products like pure vegetable oil—an opening price point item with a stable quality profile—serve as ideal benchmarks. In contrast, items like salsa vary widely in ingredients and quality, making price comparisons less meaningful. By centering our analysis on consistent, comparable products, we deliver more accurate, actionable insights into retailer pricing strategies.
- **Sales Performance:** To ensure we focus on the items that matter most to consumers, only high-dollar volume and top-performing products were included in our index.

#### Linking Methodology:

- **First Step:** First, we look for the exact same item (UPC) carried across retailers.
- **Second Step:** Next, we leverage our proprietary DPL (Dynamic Product Linking) process to compare private label items across different retailers. We allowed a 12% size variance.
- **Third Step:** When an exact product match isn't available, we aim to mirror the consumer's perspective by identifying a reasonable, functionally equivalent substitute. This ensures our comparisons remain relevant and representative. For example, if a specific type of sugar is unavailable, we substitute with a comparable option. Other common scenarios include using sharp cheddar in place of medium, adjusting for egg size variations, or selecting cage-free eggs when that's the retailer's standard offering.

#### Index Calculation:

- **Numerator:** The total sum of the basket items using the Mode Regular Price for each comparable item within a specific retailer and division.
- **Denominator:** The total sum of the basket items using the Average Mode Price for each item across the division in that retailer.

This method allows us to create a robust index, providing retailers with valuable insights into how your pricing strategy is performing relative to competitors. The report highlights potential opportunities for improvement and areas where your pricing may be out of alignment with market expectations.

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### Are You Winning on Price Where It Matters Most?

Connect with our team to uncover margin opportunities and strengthen your value perception where it counts.

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