



# POWER OF MEAT 20 26



ANNUAL MEAT  
CONFERENCE.

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The **Annual Meat Conference (AMC)** is designed as the yearly educational event that brings all segments of the retail meat industry together to learn how to improve marketing, operations, and profitability of meat and poultry. The conference is sponsored by FMI and the Meat Institute.

**About FMI – The Food Industry Association** — As the food industry association, FMI works with and on behalf of the entire industry to advance a safer, healthier and more efficient consumer food supply chain. FMI brings together a wide range of members across the value chain — from retailers that sell to consumers, to producers that supply food and other products, as well as the wide variety of companies providing critical services — to amplify the collective work of the industry. [www.FMI.org](http://www.FMI.org)

Members of the **Meat Institute**, the nation’s meat and poultry packers and processors, founded the **Meat Foundation**, a non-profit 501c (3) organization which has supported the meat industry through research, education, and scholarships for more than 80 years. The Meat Foundation is committed to advancing scientific understanding, cultivating future leaders, and supporting continuous improvement in the meat industry. The Foundation engages leaders from industry, academia and government to advance scientific understanding related to food safety, nutrition, the environment and worker safety, among other issues. For more information, visit [www.meatfoundation.org](http://www.meatfoundation.org) or [www.meatinstitute.org](http://www.meatinstitute.org).

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# Study Highlights

## Introduction

Now in its 21<sup>st</sup> year, The Power of Meat provides a comprehensive view of the meat department, combining long-standing consumer research with Circana point-of-sale and panel data. The 2026 edition captures how consumers navigated ongoing financial pressure in 2025, reinforcing meat's role as a dietary and budget priority while revealing how value, health, convenience and sustainability continued to reshape shopping and eating behaviors. Together, these insights are designed to help retailers and suppliers align strategy, assortment and communications with today's evolving meat shopper.

## Category Overview

The meat department delivered a stellar performance in 2025, reaching a record \$111.9 billion in dollar sales alongside a 2% increase in volume sales. Growth was driven by more households buying meat, increased shopping frequency and higher spend per trip, reinforcing meat's position as the largest and fastest-growing fresh perimeter department. Beef generated 70% of dollar growth and 56% of pound growth, underscoring strong consumer demand in the face of inflation and financial pressure for many consumers.

## Marketplace Impact

While the rate of inflation was moderate in 2025, cumulative food price increases over recent years kept financial pressure front and center.

Consumers responded by recalibrating where, what and how much they bought, yet meat and poultry remained largely protected and prioritized in household budgets. Shoppers actively balanced value-seeking behaviors with

selective splurges tied to holidays, entertaining and special occasions, creating a bifurcated marketplace that rewards both sharp value execution and well-timed premium offers.



## Meal Inspiration

Meal decisions in 2026 are shaped by more than price alone, with a growing role for digital discovery. Interest in transparency, health and sustainability remains strong, particularly among younger and financially comfortable/secure consumers, even as food exploration has softened under budget pressure. Social media, search engines and emerging use of artificial intelligence are increasingly influential sources of meal and meat inspiration, signaling new opportunities to engage shoppers earlier in the planning process.



## Meat Consumption

Meat and poultry continue to anchor meals across dayparts, reflecting consumers' views on their importance for protein, satiety and overall diet quality. At-home meal occasions remain elevated, supporting growing consumption levels and reinforcing the relevance of versatile cuts and formats that work across breakfast, lunch and dinner, as well as an increasingly important snacking occasion.

## Parents on Their Kids' Attitude Toward Meat

Meat and poultry enjoy broad acceptance among children of all ages, with enjoyment increasing modestly as kids get older. Children, especially teens, play a meaningful role in household purchase decisions and frequently request protein-rich foods, led by meat and poultry. This reinforces meat's role in family meal planning and highlights opportunities to align products and messaging with both parental priorities and kids' preferences.

## Meat Purchase Decisions

Meat purchase decisions reflect a complex balancing act among price, quality, convenience, health and values. While affordability and promotions matter, quality ultimately remains the top driver, particularly for older consumers. Younger shoppers show a greater willingness to pay more for brands and attributes that align with

their priorities, emphasizing the importance of clearly communicating value beyond price alone.

### **Meat and Convenience**

Time-saving solutions continue to gain traction as shoppers look to simplify meal preparation without sacrificing quality. Fully-cooked, ready-to-heat and value-added meat and poultry options play an increasingly important role, supporting everyday needs, restaurant replacement meals and special occasions by helping consumers manage time and budget constraints.

### **Meat and Poultry Purchasing Channels**

Channel choice reflects ongoing shifts toward the mass, club and online channels, as shoppers seek value, efficiency and flexibility. While traditional supermarkets remain central to meat purchases, cross-channel shopping is now the norm, requiring consistent pricing, assortment and messaging strategies, along with strong differentiation to maintain engagement and share.

### **Full-Service Counters**

Service counters continue to offer differentiation through freshness, expertise and customization, though interest in alternative service models is growing. Shoppers value knowledgeable staff and inspiration at the counter, particularly for special occasions and premium cuts, reinforcing the role of service as both a sales and trust-building tool.

### **Case-Ready and Packaging**

Case-ready meat and poultry continued to enjoy strong acceptance, supported by perceptions of quality, consistency and convenience. Packaging improvements, including leak resistance, extended shelf life and reduced plastic, resonate with shoppers and contribute to both operational efficiency and sustainability perceptions.

### **Meat and Health**

Health remains a powerful driver of meat and poultry consumption, with protein firmly at the center of consumer interest. Shoppers connect meat to strength, energy and overall wellness, creating opportunities to reinforce meat's role in balanced diets and to educate consumers on nutrient density and protein quality.

### **Meat Raising and Sourcing Practices**

Interest in animal welfare and sourcing transparency remains elevated, with claims-based meat continuing to gain traction. Organic and/or grass-fed meat and poultry grew dollars, units and pounds by double digits in 2025. While not all shoppers actively seek out these attributes, many believe there is a relationship between raising and handling practices and the taste of the meat and poultry — underscoring the importance of clear, credible and ongoing communications around production practices.

### **Animal Agriculture and the Planet**

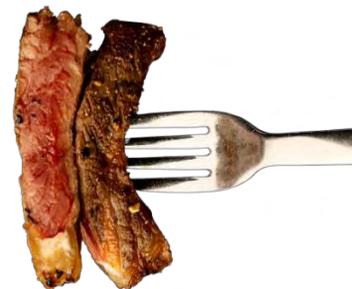
Beyond valuing sourcing and production transparency, more than half of consumers want to make food and packaging choices that help the environment. Sustainability-minded consumers gravitate toward brands and retailers that align with their values, particularly around local sourcing and packaging focused on minimizing food and plastic waste.

Financial pressure tempers broader adoption of raising practices that emphasize sustainable production, placing the onus on the industry to integrate sustainability in ways that support quality and value.

### **Looking Ahead to 2026**

As 2026 unfolds, value will remain central as households continue to navigate the price-wage imbalance. At the same time, meat and poultry are well positioned to build on momentum through center-of-plate positioning, protein-forward health messaging, convenient solutions and targeted sustainability efforts.

By aligning with how different consumer groups balance budgets, values and expectations, the industry can sustain growth and relevance in a dynamic marketplace.



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# Introduction

## About This Report

The 2026 Power of Meat provides shopper insights regarding meat and poultry shopping, preparation and consumption overlaid with sales and performance statistics. Now in its 21<sup>st</sup> year, the longevity of the research provides a unique perspective on the changes in meat and poultry attitudes and behaviors in today's dynamic marketplace.

## Methodology

The study provides survey insights from 1,657 grocery shoppers who are between 18 and 75 years of age and describe themselves as meat eaters or flexitarians (94% of all shoppers).

- The sample is Census balanced for region and ethnicity.
- Gender, age and income are mirrored to their respective meat department dollar index using Circana household panel and retailer-based transactional data to align opinions with department engagement.

For details on the composition of the survey sample, see the Respondent Profile at the end of this report.

## Circana Data Overlay

Sales and shopping dynamics data was provided by Circana. The sales overlay reflects Circana's MULO+ universe and household panel data provides insights into shopper dynamics, such as trips and channels.



## Protein PACT

The Protein PACT for the People, Animals and Climate of Tomorrow is designed to accelerate momentum and verify progress to support healthy people, healthy animals and a healthy planet across all animal protein sectors. In 2025, the Meat Institute conducted its fourth annual data collection on more than 90 metrics amongst its members. Companies representing more than 90% of the volume in the industry participated, demonstrating meaningful progress toward achieving ambitious industry goals including:

- Optimize contributions to healthy land, air, and water.
- Be the leading source of high-quality protein in balanced diets.
- Provide the most humane care and raise healthy animals.
- Produce safe products without exception.
- Support a diverse workforce and ensure safe workplaces.

In 2026, an updated data framework will increase alignment with retail sustainability priorities, better connecting processor efforts to customer data requests.

For more information, visit, [theproteinpact.org](https://theproteinpact.org)

# Category Overview

## KEY INSIGHT:

The meat department had a stellar 2025, with dollar, unit and volume growth driven by more shoppers and transactions. Sales increased 6.8% to a record \$112 billion, while pound sales rose 2.0% to the second-highest level since the 2020 COVID-19 pandemic year. Meat was the largest and fastest-growing perimeter department, capturing 25.3% of total fresh perimeter sales.

## The Meat Department Delivered the Ultimate Growth Trifecta in 2025

The meat department's banner year was driven by gains in the number of people buying meat and poultry, higher trip frequency and increased spend per trip. More than 98% of households purchased meat and poultry in 2025. Americans bought meat and poultry more than once a week, up 4.5% versus 2024. Combined with a 3.0% increase in the average transaction size, per household meat spending increased by 7.6% in 2025. Beef and ground beef gained the most.

| Households buying   |                          | Trips/buyer/year  |                          | Dollars/trip  |                          | Spend/buyer/year  |                           |
|---|--------------------------|---|--------------------------|---|--------------------------|---|---------------------------|
|  |                          |  |                          |  |                          |  |                           |
| <b>98.3%</b>  |                          | <b>56.5</b>   |                          | <b>\$16.63</b>  |                          | <b>\$939.67</b>   |                           |
| <b>+0.1%</b><br>vs. 2024  | <b>+0.1%</b><br>vs. 2022 | <b>+4.5%</b><br>vs. 2024  | <b>+7.1%</b><br>vs. 2022 | <b>+3.0%</b><br>vs. 2024  | <b>+6.1%</b><br>vs. 2022 | <b>+7.6%</b><br>vs. 2024  | <b>+13.6%</b><br>vs. 2022 |

Source: Circana, Household panel, all outlets, 52 weeks ending 12/28/2025, excluding meat sold in the frozen food and the food service/deli departments.

### Households buying vs. YA

- +0.5% Ground beef
- +0.2% Beef
- +0.1% Chicken
- 0.6% Turkey
- 1.5% Pork
- 1.6% Lamb

Source: Circana, 52 w.e. 12/28/2025

### Trips vs. YA

- +7.0% Beef
- +6.6% Ground beef
- +4.3% Chicken
- +3.9% Pork
- +1.3% Turkey
- 1.9% Lamb

Source: Circana, 52 w.e. 12/28/2025

## Another Record-Setting Year

Total food and beverages gained 3.3% in dollars and 0.6% in units. Perishables did slightly better, growing dollar sales by 4.5% and units by 1.1%. The meat department stood out with above-average gains, especially fresh meat and poultry that accounted for 71% of total sales. Processed meat grew dollars, but units and volume were flat.

|                        | Dollars         | Dollars %<br>change vs. YA | Units        | Unit %<br>change vs. YA | Volume<br>(lbs) | Lbs %<br>change vs. YA |
|------------------------|-----------------|----------------------------|--------------|-------------------------|-----------------|------------------------|
| <b>Meat department</b> | <b>\$111.9B</b> | <b>+6.8%</b>               | <b>15.0B</b> | <b>+1.9%</b>            | <b>23.3B</b>    | <b>+2.0%</b>           |
| Fresh meat             | \$79.5B         | +9.1%                      | 8.4B         | +3.8%                   | 16.9B           | +3.0%                  |
| Processed meat         | \$33.4B         | +1.4%                      | 6.6B         | -0.3%                   | 6.4B            | -0.5%                  |

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 12/28/2025

## Millennials and Gen Z Accounted for 67% of Unit Growth in 2025

Boomers have long dominated meat department spending and continue to do so today, alongside Gen X, the smallest of the generations. Gen Z and Millennials rapidly ramped up meat spending and accounted for two-thirds of all unit growth in 2025.

Differences in department contribution were driven by purchase frequency and transaction size rather than household penetration.

- Across income, ethnicity and age cohorts, at least 97% of households purchased meat and poultry in 2025.
- Gen X and Boomers shop often, averaging a slightly lower transaction size. Millennials spent more per trip but shopped less often.
- Gen Z's share of total spending reached 3.1% in 2025 and is growing rapidly. The Silent Generation contributed a similar, though shrinking, share.

### 2025 Unit sales

|             | % of<br>units | Units<br>vs. YA |
|-------------|---------------|-----------------|
| Gen Z       | 3.1%          | +47.2%          |
| Millennials | 30.3%         | +7.3%           |
| Gen X       | 31.0%         | +3.6%           |
| Boomers     | 32.3%         | +3.1%           |
| Silent Gen  | 3.3%          | -13.8%          |

Source: Circana, Household panel, 52 w.e. 12/28/2025

## Beef Dominated Fresh Meat Sales; Gains for All Major Species

Beef's \$45 billion in sales represented 40% of meat department dollars, exceeding the entire processed meat aisle. Beef also generated 71% of the department's dollar gains and 57% of total volume gains in 2025. Chicken posted slightly higher volume sales than beef and delivered the second-highest volume growth. Pork and turkey also posted year-over-year gains in pound sales, whereas the second half of the year negatively affected lamb.

| 2025 Fresh meat           | Dollar sales   | Dollars vs. 2024 | Dollars vs. 2023 | Volume sales (lbs) | Volume vs. 2024 | Volume vs. 2023 |
|---------------------------|----------------|------------------|------------------|--------------------|-----------------|-----------------|
| <b>Total fresh meat</b>   | <b>\$79.5B</b> | <b>+9.1%</b>     | <b>+16.5%</b>    | <b>16.9B</b>       | <b>+3.0%</b>    | <b>+6.4%</b>    |
| Beef                      | \$45.0B        | +12.4%           | +23.3%           | 6.2B               | +4.3%           | +9.1%           |
| Chicken                   | \$20.7B        | +6.5%            | +10.9%           | 6.5B               | +3.2%           | +6.4%           |
| Pork                      | \$8.7B         | +3.3%            | +6.9%            | 2.7B               | +1.1%           | +2.0%           |
| Turkey                    | \$3.3B         | +3.9%            | +4.0%            | 1.2B               | +0.6%           | +3.2%           |
| Lamb                      | \$959M         | +7.4%            | +12.5%           | 111M               | -0.6%           | +11.2%          |
| Exotics (including bison) | \$219M         | -1.8%            | +5.2%            | 25M                | -1.1%           | +4.0%           |
| Veal                      | \$43M          | -3.0%            | -8.5%            | 6M                 | -3.3%           | -9.7%           |

Source: Circana, Integrated Fresh, MULO+, % growth versus year ago, 52 week ending 12/28/2025 versus YA and 2YA

## Wide Range of Performances for Processed Meat and Poultry

Lunchmeat underperformed in the processed meat side of the business, while both breakfast and dinner sausage posted strong gains in 2025. Processed chicken items, such as nuggets and strips sold in the meat department, also delivered substantial growth, while inflation weighed on bacon volume sales.

| 2025 Processed meat         | Dollar sales   | Dollars vs. 2024 | Dollars vs. 2023 | Volume sales (lbs) | Volume vs. 2024 | Volume vs. 2023 |
|-----------------------------|----------------|------------------|------------------|--------------------|-----------------|-----------------|
| <b>Total processed meat</b> | <b>\$32.4B</b> | <b>+1.4%</b>     | <b>+1.9%</b>     | <b>6.4B</b>        | <b>-0.5%</b>    | <b>-0.4%</b>    |
| Bacon                       | \$7.1B         | +2.8%            | +7.4%            | 1.13B              | -0.3%           | +1.4%           |
| Packaged lunchmeat          | \$6.9B         | -1.6%            | -3.8%            | 1.15B              | -2.8%           | -3.8%           |
| Dinner sausage              | \$5.9B         | +3.6%            | +6.8%            | 1.30B              | +2.1%           | +5.6%           |
| Frankfurters                | \$3.3B         | +2.1%            | +3.8%            | 861M               | -2.8%           | -3.9%           |
| Breakfast sausage           | \$2.5B         | +4.0%            | +8.4%            | 529M               | +1.9%           | +4.4%           |
| Smoked ham                  | \$2.0B         | +0.7%            | +0.6%            | 664M               | -0.7%           | -1.2%           |
| Processed chicken           | \$850M         | +4.4%            | +6.2%            | 133M               | +4.8%           | +9.3%           |

Source: Circana, Integrated Fresh, MULO+, % growth versus year ago, 52 weeks ending 12/28/2025 versus YA and 2YA

### INDUSTRY OPPORTUNITIES:

The meat department's strong 2025 performance underscores broad-based demand growth.

- At the department level, aim to sustain the expanded household reach and added trips to protect volume and reinforce value across species and cuts.
- Continue to work on expanding commodity-level household penetration and trip frequency.
- Balance premiumization with accessibility and affordability.
- Provide clear usage cues, recipes and cross-merchandising with perimeter and grocery items can help maintain meat's role as a meal driver not just for dinner, but across all meal occasions, including snacking.
- Emphasize everyday meal solutions, including midweek dinner ideas, quick-prep cuts and value-added fresh options that reinforce repeat trips.
- Leverage beef's outsized contribution in creating opportunity for premium offerings, but assortment depth across price tiers, alternative cuts and portion sizes is essential to sustain volume.



# Marketplace Impact

## KEY INSIGHT:

Consumer sentiment was subdued throughout much of 2025, resulting in another year of home-centric food spending, though money-saving measures weighed on unit sales. While many prioritize meat and poultry amid financial pressure, consumers recalibrated spending across channels, types, cuts, amounts and brands. Holidays, special celebrations and entertaining remained occasions to splurge on meat and poultry.

## Financial Pressure Leads to Subdued Cross-Store Unit Performance

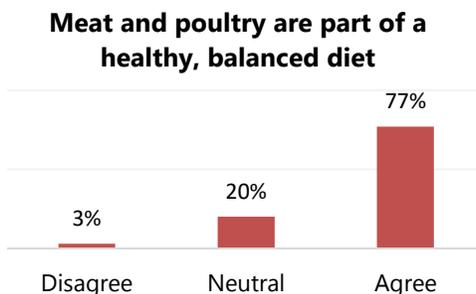
While the 2025 inflation rate was relatively modest at 2.7%, the average unit price for food and beverages in the Circana MULO+ universe has risen 40% since 2019 — leaving 95% of consumers concerned about food prices. Lower-income consumers are particularly focused on home-prepared meals and money-saving measures. This environment led to mostly subdued unit growth in 2025, while inflation continued to lift dollar gains.

|                |  Total store |  Dry grocery |  Dairy |  Produce |  Meat |  Deli |  Bakery |  Floral |  Seafood |
|----------------|---|---|---|---|--|---|--|--|---|
| Dollar sales   | \$958B  | \$473B  | \$107B  | \$97B   | \$112B   | \$56B   | \$49B  | \$10B  | \$8.6B  |
| Dollars vs. YA | +3.3%   | +3.1%   | +5.9%   | +2.7%   | +6.8%  | +2.7%   | +0.3%  | +5.5%  | +1.7%   |
| Units vs. YA   | +0.6%   | +0.3%   | +1.4%   | +1.5%   | +1.9%  | +1.7%   | -1.4%  | -1.7%  | -0.6%   |
| Price vs. YA   | +2.6%   | +2.7%   | +4.5%   | +1.2%   | +4.7%  | +1.0%   | +1.7%  | +7.3%  | +2.4%   |

Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 12/28/2025 | Price = average price per unit

## Meat and Poultry Are a Budget Priority for Many

The meat department had the strongest unit and volume growth of all departments in 2025, despite above-average inflation. This aligns with strong consumer belief that meat and poultry are part of a healthy, balanced diet. More than two-thirds of consumers say meat and poultry are non-negotiable or important when it comes to budget tradeoffs.



## Budget priority of meat and poultry compared to other food and beverages

|   |  |   |  |
|---|--|---|--|
| <b>Non-negotiable</b> — Will cut other groceries before changing meat purchases | <b>Important</b> — May change what/where/how much, but meat stays on the plate | <b>Flexible</b> — Will find ways to cut spending, incl. less meat or a few meatless meals | <b>Cutting block</b> — One of the first things to go when money is tight |
| <b>16%</b>  | <b>52%</b>   | <b>29%</b>  | <b>3%</b>  |

Income has long influenced total grocery and meat department spending, with consumer spending rising alongside household income. In today's marketplace, about half of consumers feel financially comfortable or secure, while 20% are cutting back on non-essentials or struggling to afford basics.

## Best description of current financial situation

|  |   |  |   |   |
|--|---|--|---|---|
| <b>Comfortable</b> — Don't need to worry about money | <b>Secure</b> — Income covers what we need and some extra for savings | <b>Okay</b> — Need to budget carefully to avoid overspending | <b>Tight</b> — Cutting back on non-essentials to make ends meet | <b>Struggling</b> — Behind on bills and struggle to afford basics |
| <b>22%</b>   | <b>31%</b>  | <b>28%</b>   | <b>11%</b>  | <b>9%</b>   |

While financially-strained shoppers are equally likely to prioritize meat and poultry in their budgets, they are far more likely to implement money-saving measures:

- Compare sales promotions across stores, brands, cuts and species.
- Prioritize conventional over claims-based meat and poultry.
- Purchase regular meat and poultry versus value-added, time-saving options.
- Frequently menu chicken and ground beef.

By contrast, financially comfortable/secure households are the most likely to have increased meat and poultry purchases and to routinely experiment with new cuts and kinds.

### Dollar index by income

Share of meat spending divided by share of the population

- 79** Less than \$25K
- 86** \$25- <35K
- 90** \$35- <50K
- 97** \$50K - <70K
- 107** \$70K-100K
- 117** More than \$100K

Source: Circana, household panel, all outlets, 52 w.e. 12/28/2025

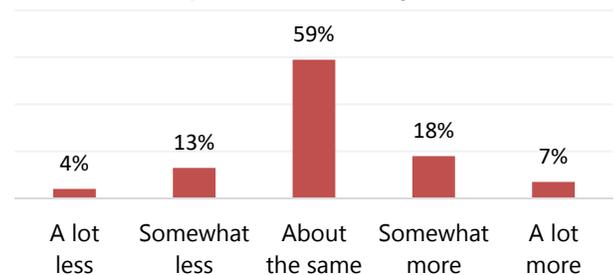
## A Net Positive in Year-Over-Year Consumption Comparisons

The 17% of consumers who reported consuming less meat than last year were more than offset by the 25% who estimated eating more.

Echoing Circana panel data:

- Gen Z (36%) and Millennials (35%) were far more likely to have increased consumption.
- Higher household income (31%) and the financially comfortable/secure (37%) also related to increased consumption.

Meat consumption versus last year



## Home-Prepared Meals and Protein Focus Drive Increased Consumption

The 25% of consumers who eat meat and poultry more often cite more home-prepared meals and a focus on protein as the primary reasons for increased consumption. These drivers are especially important among Gen Z. Health, avoiding “ultra-processed” foods, GLP-1 medications and food-as-medicine are powerful secondary reasons for consuming more meat and poultry. Millennials also point to increased confidence in preparing meat and poultry, while Gen X over-indexes for a desire to avoid “ultra-processed” foods.

| Reasons for eating more meat and poultry   | All        | Gen Z | Millennials | Gen X | Boomers |
|--|------------|-------|-------------|-------|---------|
| Eating at home more (fewer restaurant meals)   | <b>40%</b> | 46%   | 41%         | 37%   | 36%     |
| Focus on protein/following a higher protein diet                                       | <b>37%</b> | 42%   | 39%         | 33%   | 25%     |
| Found meat/poultry products I like   | <b>34%</b> | 31%   | 35%         | 34%   | 33%     |
| New recipes  | <b>29%</b> | 27%   | 32%         | 29%   | 17%     |
| More confident preparing meat/poultry  | <b>29%</b> | 27%   | 35%         | 24%   | 11%     |
| More protein-focused snacks (e.g., jerky, chicken nuggets, etc.)                       | <b>27%</b> | 29%   | 29%         | 24%   | 22%     |
| Health reasons (general health, doctor recommended, etc.)                              | <b>26%</b> | 25%   | 25%         | 28%   | 25%     |
| Found better prices or deals on meat/poultry items                                     | <b>25%</b> | 20%   | 27%         | 22%   | 22%     |
| Avoiding “ultra-processed” food/eating more natural foods                              | <b>22%</b> | 22%   | 21%         | 27%   | 17%     |
| No specific reason, simply enjoying more meat/poultry                                  | <b>22%</b> | 20%   | 19%         | 29%   | 28%     |
| Changed my breakfast, lunch or dinner routines (e.g., bacon/sausage instead of cereal) | <b>19%</b> | 27%   | 16%         | 26%   | 8%      |
| Using GLP-1 medications for weight loss, such as Ozempic                               | <b>13%</b> | 10%   | 14%         | 17%   | 3%      |
| Food-as-medicine approach  | <b>11%</b> | 14%   | 11%         | 16%   | 6%      |
| Moved away from vegan/vegetarian eating/dishes   | <b>10%</b> | 12%   | 10%         | 9%    | 8%      |

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## Meat Consumption Grew Across Meal Occasions

Dinner and lunch remain the top two meal occasions for meat and are also driving increased consumption. However, there is opportunity to build meat and poultry engagement at breakfast and during snacking, as illustrated by Gen X and Millennials. Several foodservice chains have added animal-protein options aimed at snacking, such as beef nuggets and snack cups with chicken.

## Consume more meat and poultry by meal occasion



Breakfast



Lunch



Dinner



Snacks

|             | Breakfast  | Lunch      | Dinner     | Snacks     |
|-------------|------------|------------|------------|------------|
| <b>All</b>  | <b>34%</b> | <b>69%</b> | <b>85%</b> | <b>25%</b> |
| Gen Z       | 27%        | 80%        | 86%        | 22%        |
| Millennials | 35%        | 73%        | 86%        | 30%        |
| Gen X       | 42%        | 62%        | 82%        | 22%        |
| Boomers     | 19%        | 42%        | 89%        | 19%        |

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## Cost Prompted Reduced Meat Consumption, Far Ahead of Health and Ethical Concerns

Among the 17% of consumers who now eat less meat and poultry, cost is cited far more often than concern about health, antibiotics or added hormones, recalls or the impact of meat production on animals and the planet. Cost concerns include both meat and poultry prices and the broader cost of living. Prices were a relatively minor driver of reduced consumption in 2020.

In contrast, concerns about healthfulness, antibiotics or added hormones, recalls, sustainability and animal welfare were far less influential as reasons for eating less meat than in 2020, having declined by as much as 20 percentage points since 2020. Guilt around eating meat and the belief that vegetarian or vegan diets are more ethical have also diminished substantially. This points to a marked improvement in consumer sentiment toward animal protein, reinforced by the growing number of people eating more meat specifically for health-related reasons.

| Reasons for eating less meat and poultry          | 2026 | Financially well-off | Financially tight or struggling | 2020 & change vs. 2026 |
|---|------|----------------------|---------------------------------|------------------------|
| Cost of meat/poultry                              | 54%  | 41%                  | 81%                             | 16% ↑                  |
| Cost of groceries and life in general             | 50%  | 37%                  | 66%                             | 13% ↑                  |
| Avoiding "ultra-processed" foods                  | 25%  | 30%                  | 19%                             | --                     |
| I'm focusing more on quality than quantity        | 22%  | 24%                  | 16%                             | 27% ↓                  |
| Concerns over the healthiness of eating meat      | 19%  | 22%                  | 25%                             | 39% ↓                  |
| Concerns over antibiotics, hormones and chemicals | 18%  | 15%                  | 13%                             | 33% ↓                  |
| Concerns over the healthiness of eating poultry   | 17%  | 13%                  | 9%                              | 23% ↓                  |
| Concerns over recalls/food safety                 | 17%  | 15%                  | 25%                             | 23% ↓                  |
| Concerns over the environmental impact            | 15%  | 24%                  | 13%                             | 29% ↓                  |
| Concerns over animal welfare                      | 14%  | 9%                   | 16%                             | 35% ↓                  |
| Doctor/medical advice                             | 12%  | 17%                  | 6%                              | 8% ↔                   |
| I sometimes feel guilty when eating meat/poultry  | 11%  | 9%                   | 13%                             | 31% ↓                  |
| Buying more plant-based meat alternatives         | 11%  | 15%                  | 3%                              | 23% ↓                  |
| I think it's more ethical to eat vegan/vegetarian | 9%   | 11%                  | 6%                              | 17% ↓                  |
| Family/friends are flexitarian/vegetarian/vegan   | 7%   | 15%                  | 3%                              | 6% ↔                   |
| Using GLP-1 weight-loss medications               | 5%   | 8%                   | 3%                              | --                     |

Source 2020 comparison: 210 Analytics (cost) and Power of Meat 2020 (rest). Well-off includes comfortable and secure

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## Shoppers Recalibrated the Meat Purchase

Consumers did not walk away from meat and poultry, but many recalibrated how much, where and what they bought. Sales promotions were cited most often as a money-saving strategy, followed by shopping at lower-price stores. About one-third adjusted the meat and poultry purchase itself by switching to cheaper cuts and types. Most strategies were consistent across incomes, ages and regions, with

### Pack size strategies

| Financial situation | Smaller packages | Larger packages |
|---------------------|------------------|-----------------|
| Comfortable         | 17%              | 31%             |
| Secure              | 17%              | 29%             |
| Okay                | 17%              | 29%             |
| Tight               | 33%              | 21%             |
| Struggling          | 33%              | 15%             |

the key exception of pack size. When income allows, shoppers tended to trade up to larger packs, while financially-strained consumers were more likely to purchase smaller packs.

| Meat money-saving strategies                               | 2026 |
|--|------|
| Buy/wait for sales/promotions                              | 50%  |
| Shop at lower-price stores                                 | 46%  |
| Reduce portion sizes per meal                              | 38%  |
| Buy more ground meat or cheaper cuts                       | 34%  |
| Switch to a cheaper kind, like beef to chicken/pork/turkey | 31%  |
| Choose smaller pack sizes                                  | 29%  |
| Choose larger pack sizes for bulk discount                 | 25%  |
| Eat meat/poultry less often                                | 22%  |
| Buy more frozen meat/poultry                               | 21%  |

*"We buy more pork now and often mix ground beef and pork."*

*"We shop at the value store more often instead of the regular grocery store."*

*"I used to just look for the sales signs when shopping, but now I check what's on sale beforehand."*

### INDUSTRY OPPORTUNITIES:

Prioritization of animal protein is partially offset by heightened price sensitivity, creating clear opportunities to support value-seeking behavior while reinforcing meat's role in home-prepared meals and snacks.

- Value perception matters as much as price. Reinforce value through clear pricing ladders, relevant promotions and helpful tips about portion size and multi-meal usage.
- Offer a mix of conventional, premium and value-oriented options to help protect volume without sacrificing margin.
- Emphasize the cost savings in home-prepared meals and snacks, while fully-cooked and value-added assortment remain critical for well-off households seeking convenience.
- Support demand across income levels with protein-forward positioning.
- The debate surrounding "ultra-processed" foods suggests opportunity in simpler ingredient statements and minimally-processed messaging.
- While dinner and lunch dominate consumption, address snacking for incremental growth opportunities in fresh, frozen and deli-prepared through smaller portions and grab-and-go formats.



**Deli-prepared meat/poultry**  
 \$6.4 billion | +2.4%  
 956 million units | +3.2%

---

**Frozen meat/poultry**  
 \$15.0 billion | +7.4%  
 1.6 billion units | +5.6%

Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/28/2025

### Overarching Meal Strategies Provide Sales Opportunities

In addition to an overarching focus on reducing restaurant meals while doing more scratch cooking, the focus on many of the key money-saving measures intensified over the past year.

- 34% consumed restaurant meals less often. Restaurant transactions declined 2% year-over-year in 2025, according to Circana, with only full-service restaurants gaining.
- Fully-cooked options served as a popular stand-in for restaurant meals, driving strong growth in deli-prepared meat and poultry.
- Nearly one-third of consumers purchased more frozen meat and poultry, contributing to a 5.6% unit gain, the highest growth of all frozen food categories in 2025.

| Habits compared with last year   | Never do, nor did before | Less often | As often | More often |
|--|--------------------------|------------|----------|------------|
| Looking at what meat and poultry is on sale  | 5%                       | 5%         | 34%      | 56%        |
| Cooking from scratch   | 4%                       | 10%        | 39%      | 47%        |
| Buying frozen meat and poultry, such as hamburgers, chicken breasts, chicken nuggets, etc.                         | 6%                       | 15%        | 48%      | 31%        |
| Buying fully-cooked meat/poultry (rotisserie chicken, ribs, etc)   | 8%                       | 24%        | 42%      | 26%        |
| Eating restaurant food (on premise, takeout or delivery)   | 4%                       | 34%        | 39%      | 23%        |
| Buying pre-marinated, seasoned or prepared items, such as hamburgers, kabobs, seasoned chicken, etc. (value-added) | 15%                      | 25%        | 37%      | 22%        |

Well-off consumers ate restaurant meals more often and bought more fully-cooked and value-added meat, while financial strain drove a greater focus on sales promotions and scratch cooking.

| % More often                     | Financially well-off | Financially tight or struggling | Gen Z | Millennials | Gen X | Boomers |
|----------------------------------|----------------------|---------------------------------|-------|-------------|-------|---------|
| Reviewing sales promotions       | 44%                  | 76%                             | 49%   | 54%         | 60%   | 58%     |
| Cooking from scratch             | 39%                  | 61%                             | 50%   | 50%         | 46%   | 42%     |
| Eating restaurant food           | 35%                  | 3%                              | 33%   | 33%         | 16%   | 11%     |
| Buying fully-cooked meat/poultry | 35%                  | 19%                             | 37%   | 36%         | 21%   | 12%     |
| Buying value-added meat/poultry  | 34%                  | 17%                             | 28%   | 33%         | 18%   | 8%      |

Well-off consumers include financially comfortable and secure.

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## Plenty of Reasons to Splurge on Meat and Poultry

While money-saving measures shaped everyday purchases, holidays, special occasions and entertaining remained the primary reasons to spend more on meat and poultry.



Boomers and financially-pressured households showed the greatest spending restraint, with an above-average likelihood to not splurge for any reasons, though many did act on good promotions. Financially comfortable/secure shoppers were most easily persuaded to splurge on preferred brand and cut.

In addition, Gen Z and Millennials were more likely to trade up for cuts and types of meat and poultry they perceive as healthier, more sustainably, ethically or humanely raised, as well as for value-added meat and poultry.

### Reasons to spend a little more on meat and poultry than normal

|  | 2025 | 2026 |
|--|------|------|
| For holidays, like Thanksgiving or New Year's              | 35%  | 48%  |
| For special occasion (birthdays, movie/date nights, etc.)  | 31%  | 41%  |
| When cooking for others, like entertaining, cookouts, etc. | 33%  | 38%  |
| A favorite cut I've been craving                           | --   | 38%  |
| To do something nice for myself/my family                  | 29%  | 36%  |
| If it's a brand I like                                     | 26%  | 31%  |
| Capitalize on a hot sales promotion                        | 38%  | 28%  |
| If it's a little healthier                                 | 33%  | 27%  |
| Replacing a restaurant meal that would have cost more      | 21%  | 26%  |
| Portion/pack size that I wanted                            | 29%  | 19%  |
| For convenience/saving time                                | 25%  | 19%  |
| If it's produced more sustainably, ethically or humanely   | 19%  | 14%  |
| None, I try very hard to stick to the list/not spend extra | 6%   | 5%   |

### INDUSTRY OPPORTUNITIES:

The shift toward fewer restaurant meals and greater reliance on scratch cooking reinforce the importance of meal-based strategies in driving meat and poultry sales. Consumers are actively managing food budgets, but they continue to create room for splurge moments, depending on occasion and financial comfort.

- Position meat as the centerpiece of cost-effective meals.
- Support scratch cooking by emphasizing versatile cuts, family-friendly formats and meal-building solutions that stretch across multiple meals.

# 95%

Of consumers have 1+ reasons or occasions when they are willing to spend a little more on meat/poultry.

#### Top reasons Gen Z

- 48% Favorite cut I've been craving
- 43% Special occasions
- 42% Doing something nice for self

#### Millennials

- 44% Holidays
- 44% Special occasions
- 41% Brands I like

#### Gen X

- 51% Holidays
- 41% Special occasions
- 36% Doing something nice for self

#### Boomers

- 53% Holidays
- 42% Good sales promotion
- 36% Entertaining

#### Financially comfortable/secure

- 46% Brand I like
- 44% Favorite cut I've been craving
- 41% Special occasions

#### Financially okay

- 50% Holidays
- 38% Special occasions
- 36% Doing something nice for self

#### Financially tight/struggling

- 47% Holidays
- 37% Special occasions
- 36% Good sales promotion

- Reinforce meat's value versus restaurant alternatives through bundled promotions and cross-merchandising with staples.
- Position fully-cooked meat, frozen and deli department items and ready-to-heat options as affordable upgrades to home meals that save time without sacrificing quality. Home-prepared meals are more affordable than restaurant meals, which can help justify trade-ups, particularly for well-off households and entertaining occasions.
- Use value-forward messaging, promotions and scratch-cooking support, which resonates most with financially-pressured households.
- Position frozen meat and poultry as a smart, longer-term meal-planning and budgeting tool emphasizing shelf life, flexibility and reduced food waste as part of the value equation.
- Leverage premium cuts, branded offerings, value-added items and sustainability cues to appeal to financially comfortable/secure shoppers as well as Gen Z and Millennials during splurge occasions.
- Activate holidays and entertaining as planned trade-up moments. Advanced planning tools, seasonal features and curated assortments can help capture incremental dollars.



# Meal Inspiration

## KEY INSIGHT:

Meal decisions are shaped by intentional values and digital discovery rather than price alone. While financial pressure has tempered food exploration overall, interest in transparency, health and sustainability remains strong, particularly among younger and financially well-off consumers. At the same time, social media, search and artificial intelligence (AI) are redefining how shoppers discover meals and meat ideas.

## Many Motivations Fuel Meal Choices, Ranging From Adventurous to Intentional

Beyond value, key factors shaping grocery shopping and meal decisions include transparency, exploration, health and wellbeing and sustainability. Most factors carried similar influence as last year, with the exception of exploring new foods and cuisines. Food exploration declined from 43% in 2025 to 34% in 2026, aligned closely with consumers' reported financial pressure.

| Factors influencing meal choices   | Total disagree | Neutral | Somewhat agree | Completely agree |
|--|----------------|---------|----------------|------------------|
| I like to know where my food comes from  | 9%             | 24%     | 32%            | 35%              |
| I love trying new types of foods and cuisines  | 12%            | 24%     | 30%            | 34%              |
| I make an effort to choose healthy and nutritious foods  | 10%            | 28%     | 33%            | 29%              |
| I prefer to buy from companies that give back to people and communities                            | 10%            | 34%     | 32%            | 24%              |
| I try to make choices that are better for the environment, including food choices, packaging, etc. | 15%            | 32%     | 30%            | 23%              |

Younger shoppers continued to show a greater affinity for trying new foods and cuisines. Millennials also aligned more closely with brands that convey transparency and sustainable attributes, including environmental efforts and corporate initiatives that give back to people and communities. Financially comfortable and secure consumers over-index across all factors, particularly when it comes to making healthful and sustainable choices.

| % Completely agree             | Financially well-off |     | Financially tight or struggling |  | Gen Z | Millennials | Gen X | Boomers |
|--------------------------------|----------------------|-----|---------------------------------|--|-------|-------------|-------|---------|
|                                | 2026                 |     |                                 |  |       |             |       |         |
| Knowing where food comes from  | 35%                  | 44% | 25%                             |  | 35%   | 42%         | 32%   | 28%     |
| Love trying new meals/cuisines | 34%                  | 44% | 25%                             |  | 41%   | 45%         | 30%   | 19%     |
| Effort into healthy choices    | 29%                  | 45% | 12%                             |  | 31%   | 38%         | 25%   | 20%     |
| Like companies that give back  | 24%                  | 32% | 18%                             |  | 26%   | 31%         | 22%   | 16%     |
| Make environmental choices     | 23%                  | 35% | 13%                             |  | 24%   | 31%         | 18%   | 16%     |

Well-off consumers include financially comfortable and secure.

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## Digital Represents the Future of Meal Inspiration

While routine meals remain popular among Boomers, younger generations take a more digital approach to meal planning. Gen Z and Millennials look to social media first and foremost for meal inspiration.

| Top three sources of meal inspiration by generation |                          |                          |                      |
|---|--------------------------|--------------------------|----------------------|
| Gen Z   | Millennials              | Gen X                    | Boomers              |
| 58% Social media                                    | 59% Social media         | 49% Routine meals        | 65% Routine meals    |
| 39% Google/online search                            | 45% Google/online search | 40% Social media         | 35% Recipe websites  |
| 38% Routine meals                                   | 43% Routine meals        | 37% Google/online search | 28% Personal network |

AI platforms, such as ChatGPT, Gemini and Grok, are used by 15% of consumers, up from just 2% two years ago. Younger consumers greatly over-index for using AI in meal planning.

Financially strained consumers are more likely to stick to proven meals, but they are also inspired by meal ideas found on social media.

| % Completely agree  |            |                      | Gen Z | Millennials | Gen X | Boomers |                                 |
|---|------------|----------------------|-------|-------------|-------|---------|---------------------------------|
|   | 2026       | Financially well-off |       |             |       |         | Financially tight or struggling |
| Routine meals that I cook regularly   | <b>50%</b> | 41%                  | 57%   | 38%         | 43%   | 49%     | 65%                             |
| Social media, like Pinterest, Instagram, YouTube and TikTok, including influencers  | <b>45%</b> | 45%                  | 48%   | 58%         | 59%   | 40%     | 23%                             |
| Google search/search engines  | <b>37%</b> | 37%                  | 29%   | 39%         | 45%   | 37%     | 24%                             |
| Recipe websites, like Allrecipes and Epicurious                                     | <b>35%</b> | 35%                  | 30%   | 31%         | 34%   | 37%     | 35%                             |
| TV or streaming cooking shows and food channels                                     | <b>32%</b> | 34%                  | 22%   | 28%         | 40%   | 33%     | 22%                             |
| Grocery store sources, like the app, in-store recipes, meal displays and meal deals | <b>30%</b> | 30%                  | 24%   | 32%         | 38%   | 29%     | 19%                             |
| Personal network, including family/friends  | <b>29%</b> | 30%                  | 29%   | 32%         | 31%   | 27%     | 28%                             |
| Printed sources, like cookbooks and magazines                                       | <b>22%</b> | 28%                  | 19%   | 17%         | 22%   | 20%     | 27%                             |
| AI tools, like ChatGPT and Grok   | <b>15%</b> | 27%                  | 6%    | 24%         | 24%   | 10%     | 4%                              |

Well-off consumers include financially comfortable and secure.

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### INDUSTRY OPPORTUNITIES:

- Meet consumers where inspiration starts by prioritizing social media, search-engine and AI-friendly content to influence meal planning earlier in the journey. Short-form video, creator partnerships and searchable recipes help keep meat and poultry top of mind among Gen Z and Millennials.
- Balance familiarity with permission to explore through limited-time flavors, seasonal items and easy-to-try formats that encourage experimentation without increasing perceived risk. Strong online descriptions further lower trial barriers.
- Lead with transparency and values where they matter most. Clear sourcing and production information resonates with Millennials, Gen Z and financially well-off consumers, while sustainability, community impact and simple ingredient messages support brand differentiation.
- Rapid growth in AI-driven meal planning creates opportunities to optimize content for discovery and purchase, including recipe prompts, cooking guidance and protein-forward ideas. Early, credible AI engagement can shape future consideration.
- Tailor inspiration by life stage and financial comfort. Digital-first, values-led storytelling is most effective with younger and well-off consumers, especially when tied to health, sustainability and lifestyle fit.



# Meat Consumption

## KEY INSIGHT:

Nearly half of consumers are actively trying to include more protein in their meals. While meat and poultry remain center of plate at dinner and have made significant inroads at lunch, breakfast and snacking represent key growth opportunities. Greater variety in meat and poultry correlates with more frequent consumption, and interest in on-trend recipes is strong.

## Dinner Is the Undisputed Home of Meat and Poultry

Seven-in-10 consumers frequently include meat and/or poultry at dinner, followed by 47% for lunch. Breakfast and snacking are underutilized meal occasions, especially among Boomers.

Protein prioritization leads to frequent inclusion of meat and poultry across all meal occasions.

### Meat and poultry consumption by meal occasion



|              | Breakfast | Lunch | Dinner | Snacks |
|--------------|-----------|-------|--------|--------|
| Never        | 6%        | 1%    | 1%     | 12%    |
| Rarely       | 18%       | 9%    | 4%     | 35%    |
| Occasionally | 44%       | 43%   | 25%    | 38%    |
| Frequently   | 32%       | 47%   | 70%    | 16%    |

## More likely to frequently include meat/poultry

### Breakfast

- Deem protein very important
- Millennials and Gen X
- Men
- Households with children
- African American consumers

### Lunch

- Deem protein very important
- Gen Z and Millennials
- Hispanic consumers
- Households with children
- Very focused on healthy choices

### Dinner

- Deem protein very important
- Gen X and Boomers
- Financially-struggling consumers

### Snacking

- Deem protein very important
- Gen Z and Millennials
- Financially-comfortable consumers
- Households with children
- Men

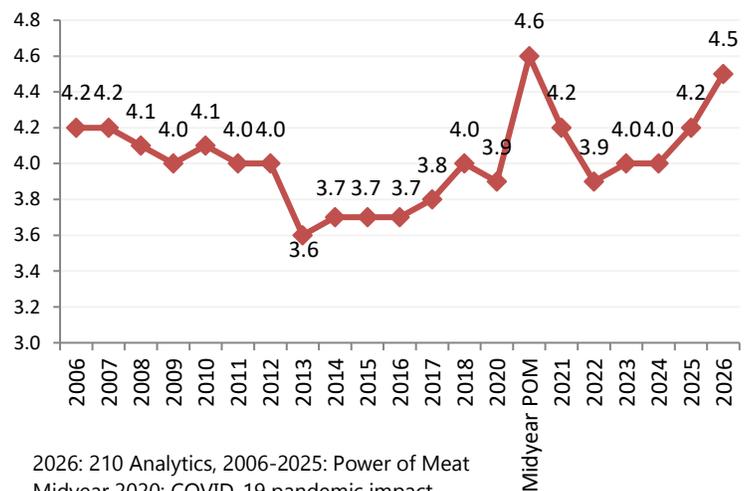
## More Home-Prepared Dinners with Meat and/or Poultry

During a typical week, consumers prepare five dinners at home. Nine in 10 of those meals tend to contain a portion of meat/poultry<sup>1</sup>. This share ranges from 85% to 92% across generations.

The number of home-prepared dinners featuring a portion of meat or poultry has increased for several years in a row. The 210 Analytics study found increases in both the number of home-prepared dinners and home-cooked meals with a portion of meat and poultry in 2025.

Consumers who are more confident in preparing meat and poultry tend to cook more meals with animal protein.

Average number of home-cooked dinners with meat/poultry per week



5.0

Average number of home-prepared dinners per week

4.5

Average number of weekly home-prepared dinners with a portion of meat/poultry

Source: 210 Analytics

<sup>1</sup> The survey did not otherwise define the word "prepare" and as such may include fully-cooked heat-and-eat, value-added or unprocessed meat. Respondents were asked to count actual portions of meat/poultry only, not pepperoni pizza, seafood, etc.

## Leaning Into Meals with Meat

Forty-five percent of consumers are actively trying to prepare more meals containing meat or poultry, with another 31% doing so off and on. These efforts are led by Gen Z (50%) and Millennials (57%) and are closely related to a heightened focus on protein in the diet.

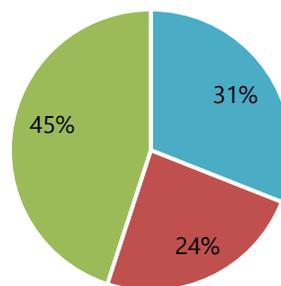
## Financial Independence and Cooking Confidence Link to Greater Exploration and Consumption

At retail, just three cuts represent 30% of unit sales, according to Circana. Most consumers rely on a core set of five-to-six cuts for routine meals or only occasionally explore new cuts, types or flavors of meat and poultry. Meat and poultry exploration increases alongside preparation confidence and frequency of meat consumption.

Adventurous innovation seekers tend to be:

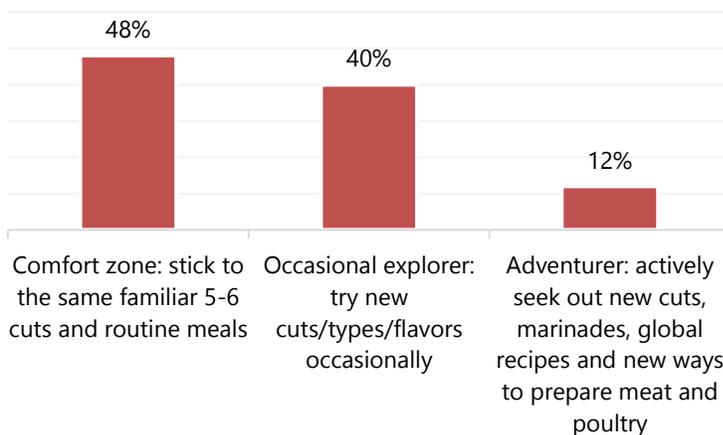
- Consumers who frequently include meat and poultry in breakfast, lunch, dinner and snacks.
- Confident cooks, who love social media.
- Households actively trying to include meat and poultry in more meals.
- Disproportionately higher-income and/or financially comfortable/secure.

### Actively try to make more meals with meat/poultry



■ Off and on, I go through phases ■ No ■ Yes

### Meat and poultry purchase habits



|   | All | Comfort zone cook | Occasional explorer | Meat/poultry adventurer | Light meat consumer | Heavy meat consumer |
|---|-----|-------------------|---------------------|-------------------------|---------------------|---------------------|
| Not confident preparing all kinds of meat/poultry | 9%  | 18%               | 8%                  | 2%                      | 17%                 | 3%                  |
| Confident preparing all kinds of meat and poultry | 70% | 55%               | 66%                 | 83%                     | 57%                 | 82%                 |

## Retailers Can Help Steer Purchases In-Store

About one-third of consumers are highly interested in meat and poultry cross-merchandising, including secondary placements of common cuts, co-located frozen and fresh items, shoppable recipes, and meal stations. Interest is strongest among Gen Z and Millennials, typically 10 to 15 percentage points above the overall average.



| Interest in various forms of cross-merchandising   | Not interested | Somewhat interested | Very interested |
|--|----------------|---------------------|-----------------|
| Have common cuts like ground beef in other areas of the store, like close to hamburger buns, tortillas, etc. | 21%            | 49%                 | 31%             |
| Have frozen meat/poultry right next to the meat department   | 14%            | 52%                 | 34%             |
| Shoppable recipes (add all items to the online cart or a list)   | 19%            | 50%                 | 32%             |
| Meal stations in-store that put together all items to make a meal  | 24%            | 44%                 | 33%             |

## Recipe Interest Signals a Shift in Relevant Inspiration

Americans show strong interest in recipes tied to current food trends, such as smashburgers, popular cooking devices like air fryers, and protein-forward meals. Interest in value cuts is more mixed, while organ meat blends generate relatively muted appeal overall. That said, organ meats are notably more popular among Gen Z and Millennials. Organ meat sales are small, yet growing in dollars and volume.

Offal meat/poultry sales

\$659M | +6.8%

206M pounds | +11.1%

Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/28/2025

| Interest by recipe type  | No interest | Somewhat interested | Very interested |
|--|-------------|---------------------|-----------------|
| Smashburger patties  | 18%         | 46%                 | 36%             |
| Air-fryer ready cuts, recipes and instructions                 | 20%         | 44%                 | 36%             |
| High-protein recipes   | 25%         | 40%                 | 35%             |
| Bold limited time flavors (hot honey, birria, etc.)            | 31%         | 40%                 | 29%             |
| Global cuts (shawarma/gyros, birria, carnitas, barbacoa, etc.) | 29%         | 43%                 | 28%             |
| Sous-vide ready cuts, recipes and instructions                 | 33%         | 47%                 | 20%             |
| Value cuts (flat iron, Denver, etc.)                           | 24%         | 51%                 | 25%             |
| Organ meat blends (heart/liver in ground beef)                 | 52%         | 29%                 | 19%             |

Millennials lead in interest for high-protein meals, while Boomers trail the average by 17 points. Global cuts and bold limited-time offerings similarly resonate far more with younger generations, reinforcing the role of protein-forward, flavor-driven innovation in attracting Gen Z and Millennials.

| % Very interested    | 2026 | Gen Z | Millennials | Gen X | Boomers |
|----------------------|------|-------|-------------|-------|---------|
| Smash burger patties | 36%  | 48%   | 45%         | 34%   | 19%     |
| Air-fryer ready      | 36%  | 45%   | 46%         | 33%   | 19%     |
| High-protein recipes | 35%  | 43%   | 51%         | 27%   | 15%     |
| Bold limited LTOs    | 29%  | 45%   | 43%         | 23%   | 7%      |
| Global cuts          | 28%  | 40%   | 40%         | 24%   | 11%     |
| Sous-vide ready      | 20%  | 24%   | 33%         | 16%   | 5%      |
| Value cuts           | 25%  | 30%   | 32%         | 22%   | 15%     |
| Organ meat blends    | 19%  | 27%   | 29%         | 15%   | 5%      |

◇ Over index ◇ Under index

### INDUSTRY OPPORTUNITIES:

- While dinner remains the core occasion, capture additional additional lunch, breakfast and snacking occasions with versatile cuts and protein-forward snacks.
- Support the many consumers who are actively trying to include more meat in home-prepared meals with meal planning assistance, ready-to-cook proteins and easy recipe content.
- Upskill through tutorials, step-by-step recipes, and influencer content to help build this confidence. Consumers who are confident in preparing meat are more likely to experiment with new cuts, flavors and meal occasions and prepare meat/poultry more often.
- Leverage flavor, preparation, nutrient and cuisine trends to attract younger generations. Limited-time offers, nutrition callouts and trending recipes can drive trial and engagement.
- Cross-merchandise to inspire trial and long-term habits.
- Match innovation and placement with consumer readiness to experiment. Organ meats, for instance, are of interest to younger, protein-focused consumers and may perform better in the frozen food aisle or in urban settings.
- Reinforce meal experimentation through social media inspiration, AI-generated recipe ideas and searchable online content to influence meat/poultry purchase decisions across all meal occasions.



# Parents' Take on Kids and Meat

## KEY INSIGHT:

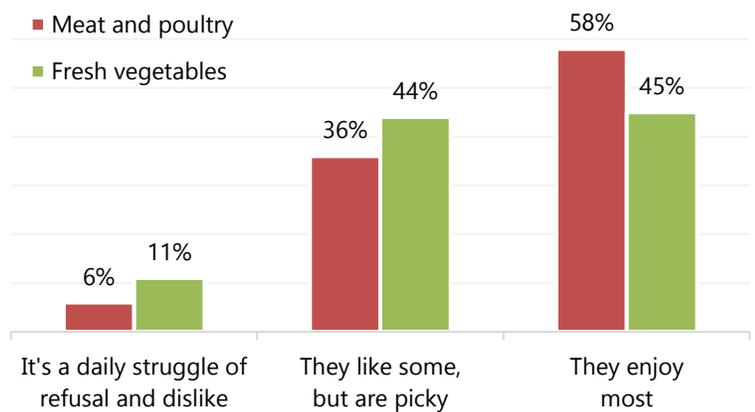
According to parents, meat and poultry enjoy broad appeal across children of all ages. Many parents prioritize protein and adjust purchases and preparation methods to align with their children's preferences. Parents report that children, especially teens, play a meaningful role in meat and poultry purchase decisions. The vast majority of teenagers actively request high-protein foods and beverages, led by meat and poultry.

## Meat and Poultry Enjoy Broad Acceptance Among Children

Six in 10 parents with children ages zero to 18 report that their kids enjoy most meat and poultry, while another 36% say their children like some, but not all, meat and poultry. Enjoyment increases modestly as children get older.

| Age of children | Daily struggle | Like some, but picky | Enjoy most |
|-----------------|----------------|----------------------|------------|
| Ages 0 to 6     | 6%             | 40%                  | 54%        |
| Ages 7-12       | 5%             | 34%                  | 62%        |
| Ages 13-18      | 6%             | 31%                  | 63%        |

## Parents' take on their children's attitude toward meat (beef, chicken, sausage, etc.) and fresh vegetables



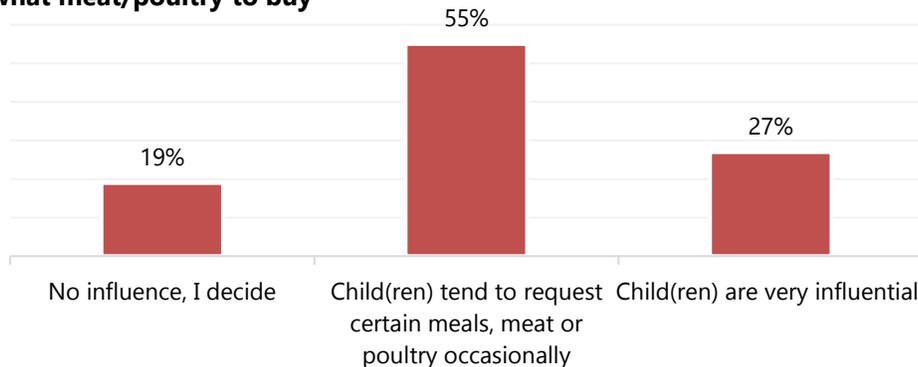
Source fresh vegetables: Southeast Produce Council and 210 Analytics, What's New? 2025 | September 2025

## Parents Say Their Children Play a Meaningful Role in Meat and Poultry Purchases

In 81% of households with children, parents report that kids have some level of influence on meat and poultry purchase decisions. In one-quarter of these households, parents describe their children's input as "very influential."

| Age of children | No influence | Some influence | Very influential |
|-----------------|--------------|----------------|------------------|
| Ages 0 to 6     | 21%          | 51%            | 28%              |
| Ages 7-12       | 17%          | 53%            | 30%              |
| Ages 13-18      | 10%          | 55%            | 34%              |

## Children's influence on parents' decisions what meat/poultry to buy



### Households with children

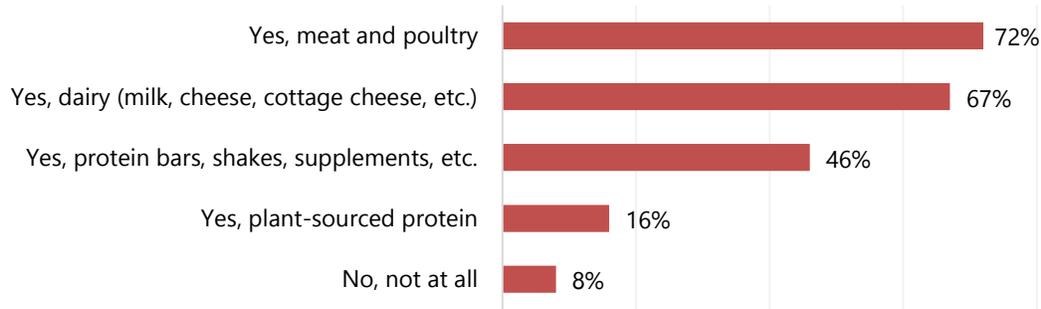
- Shop more often than households without, at 66.0 vs. 55.1 trips/year
- Spend more per trip, at \$18.56 versus an average of \$15.78 without kids.
- Spend more per household, at \$1,113 per year versus \$869.
- Over-index for beef, ground beef, chicken, bacon, sausage, hot dogs, and processed chicken.

Source: Circana, 52 w.e. 12/28/2025

## Parents Report Animal Protein Interest Among Teens

According to parents of teenagers, 92% of 13-to-18 year olds request foods and beverages they perceive as a good or excellent source of protein, with meat and poultry requested more often than any other protein source. In contrast, plant-sourced protein is requested by the fewest teens, at just 16%.

### Foods and beverages requested by teenagers that are a good/excellent source of protein, according to parents



**92%**

of parents with teenagers say their teens request foods and beverages with good/excellent protein

**72%**

of teenager parents say their teens request meat and poultry, far ahead of requests for protein bars, shakes and powders

### Parents Adapt Purchases and Preparation to Meet Children’s Needs

While few children struggle with meat and poultry, nearly half of parents incorporate kid-friendly items and sometimes prepare separate meals for children, often opting for milder flavors. Parents also emphasize healthier preparation methods, and 25% intentionally add extra protein to their children’s meals. With the exception of preparing separate meals, which is more prevalent among younger children, strategies were consistent across age groups.

| Influence of children on meat and poultry choices and preparation                   | All parents |
|---|-------------|
| Buy them kid-friendly types, like nuggets, strips, burgers, hot dogs, etc.          | 49%         |
| Try to use healthier preparation methods (grilled, baked, etc.)                     | 38%         |
| Sometimes prepare a separate child meal with a different meat than what adults eat  | 37%         |
| Use quick and easy prep (air fryer, microwave)                                      | 35%         |
| Preparation using mild flavors only (no spice)                                      | 30%         |
| Make globally-inspired meats/meals by their request                                 | 28%         |
| Add extra protein to their meals  | 25%         |
| Look for antibiotic-free, organic or better-for-you claims on meats for my children | 23%         |
| Serve less meat and switch to plant-based proteins                                  | 10%         |
| Avoid processed meat/poultry  | 9%          |

#### INDUSTRY OPPORTUNITIES:

- Clearly communicate protein benefits, including signage, packaging cues and digital content aimed at both parents and adolescents.
- With children influencing meat and poultry purchases in four out of five households, consider kids’ taste preferences, convenience and familiarity.
- Parents are actively seeking healthier preparation methods and better-for-you claims. Opportunities exist to elevate kid-friendly items through cleaner ingredients, air-fryer readiness, and simple nutritional upgrades.
- Bring tips and flexible solutions for parents who create separate meals for children, including demand for smaller portions, quick-cook options and mild-flavor variants that complement adult meals without adding complexity.
- Teens’ strong interest in meat-based protein opens the door for bolder flavors, global influences and snackable formats positioned around performance, satiety and energy.



# Meat Purchase Decisions

## KEY INSIGHT:

Price is important in the meat and poultry purchase decision, but in tandem with quality and appearance. Financial pressure heightens focus on the price per pound, sales promotions and price comparisons across stores, cuts and types of meat and poultry. Meat and poultry enjoy a strong value perception among consumers, especially chicken and ground beef, with value perceptions shaped by quality, freshness, price and taste.

## Price Remains at the Top of the Meat Purchase Decision Tree

The meat/poultry purchase decision is dominated by the combination of price and quality. Respondents picked their top three out of a list of 11 considerations. This is one less than last year, which affects the year-over-year comparisons. Most purchase drivers were similar to last year.

| Up to three most important factors when purchasing refrigerated meat/poultry | 2022 | 2023 | 2024 | 2025 | 2026       | Vs. '25 |
|--|------|------|------|------|------------|---------|
| Price per pound  | 48%  | 50%  | 61%  | 53%  | <b>51%</b> | ↔       |
| Product quality/appearance   | 60%  | 53%  | 62%  | 45%  | <b>47%</b> | ↔       |
| Total package price  | 39%  | 43%  | 52%  | 41%  | <b>41%</b> | ↔       |
| Taste or flavor experience with prior purchase                               | --   | --   | --   | 31%  | <b>33%</b> | ↔       |
| Production claims (i.e. organic, grass-fed, etc.)                            | 24%  | 21%  | 19%  | 20%  | <b>24%</b> | ↑       |
| Nutrition  | 26%  | 21%  | 19%  | 21%  | <b>21%</b> | ↔       |
| Preparation time/ease  | 15%  | 22%  | 18%  | 22%  | <b>21%</b> | ↔       |
| Preparation knowledge/confidence   | 16%  | 20%  | 17%  | 20%  | --         | --      |
| Brand  | 23%  | 24%  | 22%  | 18%  | <b>20%</b> | ↔       |
| Following a recipe/pre-planned meal  | --   | --   | --   | 9%   | <b>17%</b> | ↑       |
| Mood   | 18%  | 14%  | 6%   | 12%  | <b>14%</b> | ↔       |
| Packaging type (vacuum pack, oven-ready, etc.)                               | 13%  | 18%  | 11%  | 13%  | <b>11%</b> | ↔       |



The importance of price rises along with financial pressure. The price per pound in combination with the price per unit drive the purchase decision among the financially tight or struggling.

| Top meat and poultry purchase considerations by financial status |  |  |  |  |
|--|--|--|--|--|
| Comfortable  | Secure   | Okay   | Tight  | Struggling   |
| Quality/appearance<br>Taste<br>Price per pound                   | Quality/appearance<br>Price per pound<br>Taste | Quality/appearance<br>Price per pound<br>Total package price | Price per pound<br>Total package price<br>Quality/appearance | Price per pound<br>Total package price<br>Quality/appearance |

Price and quality dominate purchase priorities across all groups, but secondary decision drivers diverge by generation. Gen Z places greater emphasis on nutritional content, while Millennials prioritize production claims. Gen X and Boomers remain most focused on the price/quality balance.

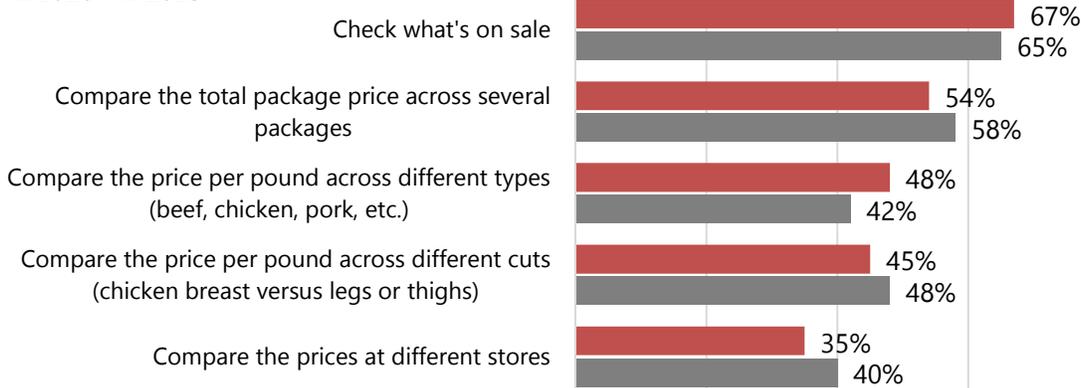
| Meat and poultry purchase considerations by generation       |  |  |  |
|--|--|--|--|
| Gen Z  | Millennials  | Gen X  | Boomers  |
| Nutritional content<br>Price per pound<br>Quality/appearance | Quality/appearance<br>Price per pound<br>Production claims | Price per pound<br>Quality/appearance<br>Total package price | Price per pound<br>Quality/appearance<br>Total package price |

## Sales Specials Remain of High Interest

With price front and center in the meat purchase, 98% of shoppers checked prices and/or promotions in at least one way. Unchanged from 2025, two-thirds checked what's on sale. More consumers compared prices across different types of meat and poultry, while fewer compared across stores. The latter aligns with more consumers shopping everyday value stores over hi-lo formats.

### Checking prices and promotions when buying meat and poultry

■ 2026 ■ 2025



*"I get emails from the loyalty programs I belong to and compare prices on the items I tend to buy."*

*"I don't really care whether I get chicken legs, thighs or even a whole chicken, so whatever is on sale, I buy."*

## Mixed Levels of Merchandised Volume

About 30% of total meat department volume is sold on promotion, including special displays, circular features and price-only reductions. Processed meat accounts for a higher, and growing, share of promoted volume, driven largely by smoked ham, where 47.4% of volume is sold on promotion, and bacon at 42.7%.

|                        | % of pounds sold on promotion | % change vs. 2024 | % change vs. 2022 | Avg. weekly items per store | % change vs. 2024 | % change vs. 2022 |
|------------------------|-------------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|
| <b>Meat department</b> | <b>30.2%</b>                  | <b>-6.5%</b>      | <b>-2.0%</b>      | <b>452</b>                  | <b>+0.7%</b>      | <b>-1.8%</b>      |
| Fresh meat             | 28.6%                         | -11.5%            | -9.6%             | 186                         | +0.4%             | -2.4%             |
| Processed meat         | 34.3%                         | +6.5%             | +19.3%            | 269                         | +0.4%             | -1.3%             |

Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/28/2025, including fixed weight and random weight, comparison to YA and 3YA

## Strong Value Perceptions for Chicken and Ground Beef

Consumers' value perceptions are strongest for chicken, followed by ground beef. Fewer than one in 10 shoppers view meat and poultry as poor value, though up to one-quarter consider certain proteins to be questionable value. Financial situation plays a significant role, with financially comfortable and secure consumers far more likely to rate meat and poultry value favorably. Similarly, consumers who prioritize protein in their diets are much more likely to view meat and poultry as a great value for money.

**Fresh produce value perceptions**

28% Great value  
43% Okay value

Source: FMI | Power of Produce 2026

|             | Great value for money | Okay value for money | Questionable value for money | Bad value for money | Don't buy | Great value financially well-off | Great value financially tight/struggling |
|-------------|-----------------------|----------------------|------------------------------|---------------------|-----------|----------------------------------|--|
| Chicken     | 42%                   | 41%                  | 13%                          | 3%                  | 1%        | 49%                              | 36%                                      |
| Ground beef | 36%                   | 39%                  | 18%                          | 5%                  | 2%        | 47%                              | 31%                                      |
| Pork        | 28%                   | 43%                  | 15%                          | 4%                  | 10%       | 35%                              | 17%                                      |
| Beef        | 27%                   | 42%                  | 23%                          | 7%                  | 2%        | 40%                              | 21%                                      |
| Bacon       | 20%                   | 37%                  | 27%                          | 9%                  | 7%        | 32%                              | 15%                                      |

Well-off consumers include financially comfortable and secure.

◇ Over index ◇ Under index

## The Definition of Great Value Is Multi-Faceted and Shaped by Finances

Consumers' definition of value extends well beyond price and typically includes four to five attributes. Across populations, quality, freshness, price and taste rank as the most important indicators of value. Under financial pressure, price and freshness gain importance, while quality, taste and nutrition matter more to financially comfortable/secure consumers.

| Consumer definition of great value when shopping for meat and poultry | 2026 | Financially well-off | Financially tight/struggling |
|---|------|----------------------|------------------------------|
| High quality (prime, choice, etc.)                                    | 56%  | 64%                  | 32%                          |
| Long lasting/far out "use by" date (freshness)                        | 53%  | 45%                  | 62%                          |
| Low price per pound   | 50%  | 38%                  | 73%                          |
| Great taste   | 47%  | 52%                  | 46%                          |
| Consistent quality  | 44%  | 49%                  | 42%                          |
| Nutritious/good for me  | 33%  | 40%                  | 19%                          |
| Low package price   | 32%  | 26%                  | 45%                          |
| No waste (gristle, fat, etc.)   | 28%  | 25%                  | 34%                          |
| Boneless  | 24%  | 25%                  | 24%                          |
| Fills me up/sustenance  | 18%  | 16%                  | 19%                          |
| Cheaper than another type of meat/poultry                             | 16%  | 11%                  | 34%                          |
| Production claim (grass-fed, organic, etc.)                           | 14%  | 21%                  | 5%                           |
| Versatility   | 14%  | 9%                   | 26%                          |
| Time-saving convenience   | 13%  | 20%                  | 5%                           |

Well-off consumers include financially comfortable and secure.

◇ Over index ◇ Under index

### Top 3 Great Value Factors

**Gen Z**  
 53% Freshness  
 50% High quality  
 38% Low price per pound

**Millennials**  
 59% Freshness  
 53% High quality  
 43% Low price per pound

**Gen X**  
 55% Low price per pound  
 54% High quality  
 51% Great taste

**Boomers**  
 62% Low price per pound  
 60% Great taste  
 58% High quality

## Origin Plays a Secondary Role in the Meat/Poultry Purchase

Just over half of consumers either pay little attention to where the animal was raised or prioritize value and appearance over origin. U.S.-raised resonates more strongly with financially well-off consumers, Gen X and Boomers.

| Influence of meat/poultry from animals raised in the U.S. vs. imported    | 2026 | Financially well-off | Financially tight or struggling | Gen Z | Millennials | Gen X | Boomers |
|---|------|----------------------|---------------------------------|-------|-------------|-------|---------|
| I prefer and will pay extra for U.S.-raised                               | 35%  | 41%                  | 20%                             | 22%   | 35%         | 36%   | 36%     |
| Value/appearance are my key purchase drivers. Origin plays a minimal role | 33%  | 28%                  | 37%                             | 40%   | 35%         | 30%   | 31%     |
| I don't pay attention to origin   | 21%  | 19%                  | 30%                             | 29%   | 18%         | 22%   | 21%     |
| I actively avoid imported meat/poultry                                    | 12%  | 12%                  | 13%                             | 10%   | 12%         | 12%   | 12%     |

Well-off consumers include financially comfortable and secure. ◇ Over index ◇ Under index

### INDUSTRY OPPORTUNITIES:

Value is earned at shelf through the combination of price and clarity regarding quality and freshness.

- Reinforce value beyond price alone by incorporating quality cues (color, trim, marbling, taste, etc.) and freshness dating in promotional messaging.
- Leverage chicken and ground beef as value anchors, while encouraging engagement with other cuts, species or value-added options through bundled meals, cross-merchandising and recipe solutions. Highlight the favorable price per pound for pork, which remains under-recognized.
- Promote strategically by optimizing depth, timing and featured items. Emphasizing price tiers, alternative cuts and pack sizes can help meet budget needs without over-discounting core SKUs.
- Lean into Gen Z's interest in nutrition and Millennials' emphasis on production claims that create opportunities for differentiated shelf tags, digital filters and targeted promotions that speak to distinct value definitions.
- Use clear in-store signage and digital tools that simplify price and cut comparisons to help retain shoppers within the department.



# Meat and Convenience

## KEY INSIGHT:

With time at a premium and protein a priority, time-saving solutions resonate most strongly with Millennials. Importance also rises alongside income and the presence of children. Value-added meat and poultry, ready-to-heat, ready-to-eat and meal stations are frequent go-to solutions when convenience matters.

## The Importance of Time-Saving Solutions

Meat and poultry time-saving shortcuts are “very important” to about one-third of consumers, though importance varies widely by generation and income. Millennials, particularly those with children, are two to three times more likely than Boomers to prioritize time savers. With protein being important to these consumers, they frequently turn to value-added meat and poultry options.

### Importance of time-saving meat/poultry shortcuts, such as fully-cooked, pre-marinated, recipe ready, quick cuts, etc.

|                 | Not important | Somewhat important | Very important |
|-----------------|---------------|--------------------|----------------|
| Weekday dinners | 17%           | 48%                | 35%            |
| Weekend dinners | 24%           | 44%                | 32%            |

## Rising Engagement With Value-Added Meat Sales

Value-added meat and poultry were growth drivers for much of the past decade due to higher consumption frequency and rising household penetration. In 2026, 41% of households buy value-added meat or poultry on occasion and 26% do so frequently. While engagement is gradually rebuilding toward the 2023 peak, softer participation among middle- and lower-income households continues to dampen volume gains.

### Time savings are very important

| Age              | Millennials  | Boomers      |
|------------------|--------------|--------------|
| Weekday          | 46%          | 17%          |
| Weekend          | 45%          | 16%          |
| Finances         | Well-off     | Struggling   |
| Weekday          | 46%          | 27%          |
| Weekend          | 45%          | 21%          |
| Household        | Kids         | No kids      |
| Weekday          | 47%          | 23%          |
| Weekend          | 43%          | 22%          |
| Value added (VA) | Often buy VA | Don't buy VA |
| Weekday          | 75%          | 18%          |
| Weekend          | 71%          | 14%          |

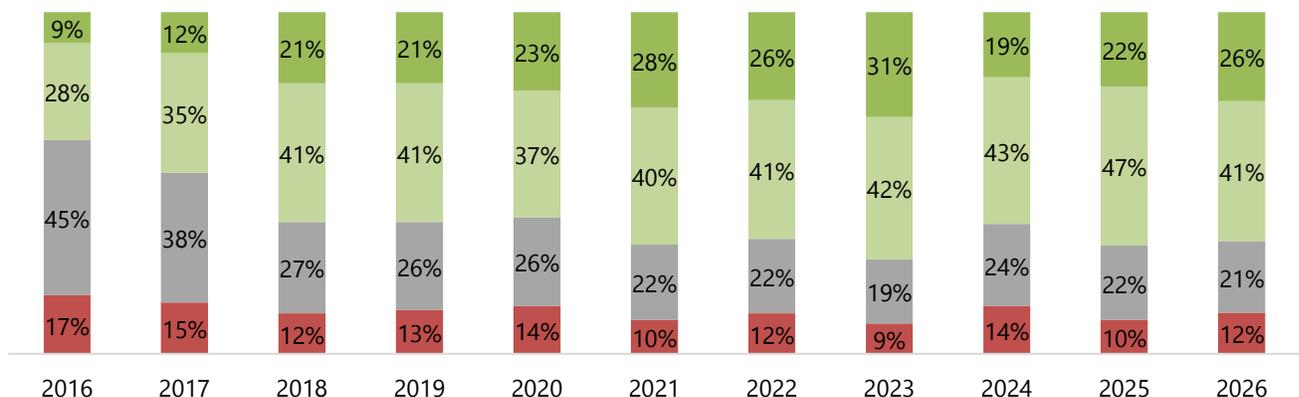
Well-off includes financially comfortable and secure

### Value-added meat and poultry survey definition:

Meat and poultry that still require cooking, but are pre-shaped, pre-marinated, pre-cut or pre-seasoned, such as kabobs, meatloaf, meatballs or pre-marinated chicken wings.

## Frequency of purchasing value-added meat/poultry

■ Never ■ Hardly ever ■ Sometimes ■ Frequently



Frequent value-added meat and poultry shoppers differ meaningfully from the average meat shopper, both demographically and behaviorally.

### Value-added consumers demographics and shopping patterns (frequent buyers)

#### Demographic insights:

- Boomers are notably less likely to buy value-added, while Millennials are highly engaged, followed by Gen Z.
- Penetration is highest among households with kids and high-income, financially comfortable/secure households.
- Value-added has the highest engagement in urban areas.

#### Shopping and consumption insights:

- Value-added consumers place high importance on all time-saving solutions, including meal displays, online ordering and fully-cooked meat and poultry.
- Core value-added consumers highly value protein.
- They also over-index for purchasing meat and poultry with production claims.

## Rising Value-Added Engagement Leads to Growth for Most Proteins

Value-added meat and poultry, such as pre-marinated, seasoned, cut/diced or pre-formed patties, had a strong year. Led by beef, total value-added fresh meat sales advanced 8.1% in dollars and 5.2% in pounds.

| Value-added             | Dollar sales  | \$ vs 2024   | Volume sales | Lbs vs 2024  |
|-------------------------|---------------|--------------|--------------|--------------|
| <b>Total fresh meat</b> | <b>\$7.2B</b> | <b>+8.1%</b> | <b>1.4B</b>  | <b>+5.2%</b> |
| Beef                    | \$4.2B        | +11.3%       | 639M         | +8.6%        |
| Pork                    | \$1.4B        | +6.2%        | 390M         | +3.1%        |
| Chicken                 | \$888M        | +1.2%        | 192M         | -2.3%        |
| Turkey                  | \$395M        | +6.1%        | 135M         | +8.3%        |
| Lamb                    | \$64M         | +8.5%        | 10M          | +11.2%       |

**Anticipated value-added meat/poultry purchases over the next year:**  
**23% More**  
**57% The same**  
**20% Less**

Source: Circana, Integrated Fresh, MULO+, 52 Weeks ending 12/28/2025 | Smaller value-added proteins not listed

Anticipated future engagement with value-added meat/poultry shows that 23% of consumers plan to increase purchases while 20% plan to decrease, balancing overall category expansion. Anticipated growth is concentrated among existing frequent consumers.

## Convenience Dollars Are Moving to Other Departments

Shoppers expressed substantial and rising interest in meal stations, holiday solutions, ready-to-cook and ready-to-eat meat and poultry that is typically found in the meat or deli departments. Much like value-added meat, interest skews toward younger generations.

**Deli-prepared meat/poultry**  
**\$6.4B | +2.0%**  
**958M units | +2.9%**  
 Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/28/2025

| Interest in time-saving meat/poultry solutions (4+5 on the 5-point scale, where 5=very interested) | 2024 | 2025 | 2026       | Millennials | Boomers |
|--|------|------|------------|-------------|---------|
| Deli-prepared, ready-to-eat meat/poultry   | 44%  | 57%  | <b>55%</b> | 66%         | 42%     |
| Meal station with meat/poultry, vegetables and sides combined                                      | 39%  | 44%  | <b>46%</b> | 54%         | 25%     |
| Fully-cooked meat/poultry that just requires re-heating  | 40%  | 42%  | <b>45%</b> | 58%         | 28%     |
| Ready-to-eat holiday meal solution (meat and sides)  | 36%  | 40%  | <b>44%</b> | 51%         | 24%     |
| Meat/poultry in microwavable or oven-ready packages  | 36%  | 38%  | <b>41%</b> | 55%         | 24%     |

### INDUSTRY OPPORTUNITIES:

- Reframe value-added, fully-cooked and meal-station solutions as protein enablers on busy days, rather than as premium indulgences. Emphasize the savings over purchasing restaurant meals.
- Softer engagement among middle- and lower-income households signals opportunity for lower-price value-added tiers alongside premium options, through smaller pack sizes, using less expensive proteins, etc.
- Follow convenience dollars across departments by coordinating meat and deli strategies, aligning assortments, pricing and messaging to capture convenience-driven spend wherever it flows.
- Millennials and Gen Z over-index for time savings, protein and production claims, creating opportunity for solutions that combine speed, nutrition and values.
- Protect and re-energize value-added chicken. Chicken's recent declines contrast with gains in deli-prepared chicken, signaling a need to reassess pricing, formats and flavor innovation.

# Meat & Poultry Purchasing Channels

## KEY INSIGHT:

More consumers are turning to supercenters, club stores and e-commerce as their primary meat and poultry destinations, driving dollar share gains for each. While in-store purchasing remains dominant, Gen Z and Millennials are far more likely to buy meat and poultry online. This signals continued e-commerce growth and highlights the need to build confidence in both online ordering overall and in purchasing a full range of cuts/types.

## Everyday Low-Price (EDLP) Formats Are Gaining Grocery Dollar Share

Traditional grocery stores have lost dollar share over the past few years to supercenters, club and online pure-play retailers, according to the Circana Integrated Fresh Panel. As meat is often central to the stock-up trip, store differentiation and reputation will play an increasingly important role in capturing both the total store trip and meat department spend.

| Channel share of total food & beverages | CY 2020 | CY 2021 | CY 2022 | CY 2023 | CY 2024 | CY 2025      |
|---|---------|---------|---------|---------|---------|--------------|
| Traditional grocery                     | 45.9%   | 44.0%   | 42.9%   | 41.9%   | 40.6%   | <b>39.2%</b> |
| Mass & supercenter                      | 19.6%   | 20.0%   | 20.6%   | 21.2%   | 21.3%   | <b>21.1%</b> |
| Club                                    | 11.7%   | 12.2%   | 12.6%   | 12.4%   | 12.6%   | <b>13.4%</b> |
| Discount grocery                        | 7.6%    | 7.1%    | 7.0%    | 6.8%    | 6.9%    | <b>7.0%</b>  |
| Online                                  | 2.3%    | 2.9%    | 3.1%    | 3.1%    | 3.8%    | <b>4.7%</b>  |
| Specialty stores                        | 3.5%    | 3.9%    | 4.0%    | 4.2%    | 4.2%    | <b>4.3%</b>  |
| Health/organic specialty                | 2.3%    | 2.2%    | 2.0%    | 1.9%    | 2.0%    | <b>2.0%</b>  |
| All other                               | 7.1%    | 7.7%    | 7.7%    | 8.5%    | 8.7%    | <b>8.4%</b>  |

◇ Long-term share increase  
◇ Long-term share decrease



Source: Circana, Total US, All Outlets, Integrated Fresh Household Panel CY 2020-2025

## Gen Z and Millennials Move Meat Dollars to EDLP

While supermarkets retained the majority share in 2026, fewer consumers identified a grocery store as their primary meat and poultry destination, defined as where they purchase the most. Supermarket share is significantly lower among Gen Z and Millennials, who over-index for buying meat and poultry at supercenters and club stores. Over time, the share of consumers naming a supercenter as their primary meat and poultry destination has risen from 16% in 2007 to 29% in 2025.

| Primary meat purchasing channel   | 2007 | 2013 | 2019 | 2025 | 2026        | Gen Z       | Millennials | Gen X       | Boomers     |
|---|------|------|------|------|-------------|-------------|-------------|-------------|-------------|
| Supermarkets  | 71%  | 66%  | 57%  | 49%  | <b>47%</b>  | 39%         | 39%         | 51%         | 65%         |
| Supercenters  | 16%  | 19%  | 22%  | 28%  | <b>29%</b>  | 36%         | 35%         | 29%         | 21%         |
| Club stores   | 6%   | 9%   | 7%   | 10%  | <b>11%</b>  | 10%         | 12%         | 11%         | 7%          |
| Hard discounters/limited assortment*                                    | --   | --   | 5%   | 5%   | <b>6%</b>   | 7%          | 7%          | 5%          | 4%          |
| Natural/organic   | 1%   | 2%   | 4%   | 2%   | <b>2%</b>   | 3%          | 3%          | 1%          | 0.2%        |
| Online  | 0%   | 0%   | 1%   | 2%   | <b>3%</b>   | 3%          | 4%          | 2%          | 1%          |
| Specialty, including butcher shops, carnicerías, farmers' markets, etc. | 5%   | 3%   | 3%   | 2%   | <b>2%</b>   | 2%          | 2%          | 1%          | 0.2%        |
| Other (drug stores, vending, etc.)                                      | 1%   | 1%   | 1%   | 1%   | <b>0.4%</b> | <b>0.4%</b> | <b>0.2%</b> | <b>0.3%</b> | <b>1.5%</b> |

\* Hard discounters, such as ALDI, Lidl and Save-A-Lot were combined into traditional grocery until 2015

◇ Long-term share increase/over-index  
◇ Long-term share decrease/under-index

## Channel Shifts Echoed in Sales Data

Much like the survey findings, Circana panel data shows that traditional grocery stores accounted for the largest share of total meat dollars in 2025. However, since 2019, their share has dropped 8 percentage points within the total \$121 billion retail meat market, reflecting channels beyond the traditional multi-outlet ones, such as butcher shops, online and farm-direct.

Mass, clubs and ecommerce have gained share over the past five years, though the supercenter share has leveled off in the past few years.

| Channel share total meat and poultry dollar sales | CY 2020 | CY 2021 | CY 2022 | CY 2023 | CY 2024 | CY 2025      |
|---|---------|---------|---------|---------|---------|--------------|
| Traditional grocery                               | 52.8%   | 50.7%   | 49.6%   | 48.5%   | 46.3%   | <b>44.8%</b> |
| Mass & supercenter                                | 19.0%   | 20.0%   | 20.8%   | 21.6%   | 21.4%   | <b>21.0%</b> |
| Club  | 12.5%   | 12.7%   | 12.9%   | 12.5%   | 13.0%   | <b>13.9%</b> |
| Discount grocery                                  | 8.5%    | 8.1%    | 7.7%    | 7.5%    | 7.8%    | <b>8.0%</b>  |
| Online  | 1.0%    | 2.0%    | 2.3%    | 2.4%    | 3.1%    | <b>3.8%</b>  |
| Specialty stores                                  | 2.3%    | 2.3%    | 2.2%    | 2.3%    | 2.3%    | <b>2.3%</b>  |
| Health/organic specialty                          | 1.0%    | 1.0%    | 1.4%    | 1.4%    | 1.4%    | <b>1.4%</b>  |
| All other   | 3.0%    | 2.9%    | 3.1%    | 3.9%    | 4.8%    | <b>4.9%</b>  |

Source: Circana, Total US, All Outlets, Integrated Fresh Household Panel CY 2020-2025

◇ Long-term share increase  
◇ Long-term share decrease

*"With a full-time job, two little kids, sports, etc., I just don't have the time to check all the ads."*

*"We buy everything in bulk, repackage it at home and freeze it. Saves a ton."*

## Price, Freshness, Quality and Cleanliness Win the Trip

Factors that dominate the meat/poultry purchase itself also play a crucial role in determining where to shop for meat and poultry. Added important attributes in determining store choice are cleanliness and in-stock position.

| Attributes consumers look for when deciding where to shop for meat and poultry | 2026       | Financially well-off | Financially tight/struggling |
|--|------------|----------------------|------------------------------|
| Prices   | <b>67%</b> | 53%                  | <b>79%</b>                   |
| Freshness  | <b>65%</b> | 66%                  | 64%                          |
| Quality/appearance   | <b>61%</b> | <b>66%</b>           | <b>56%</b>                   |
| Cleanliness  | <b>54%</b> | 52%                  | 52%                          |
| Promotions   | <b>32%</b> | 28%                  | 34%                          |
| Availability/in-stock  | <b>37%</b> | 36%                  | 37%                          |
| Brands I like  | <b>27%</b> | <b>33%</b>           | <b>18%</b>                   |
| Reputation   | <b>26%</b> | <b>31%</b>           | 24%                          |
| Cut in-store (butcher availability)  | <b>24%</b> | <b>32%</b>           | <b>15%</b>                   |
| Convenient one-stop shop   | <b>22%</b> | 25%                  | 19%                          |
| Availability of organic, natural, grass-fed and other specialty items          | <b>20%</b> | <b>26%</b>           | <b>9%</b>                    |
| Full-service counter   | <b>19%</b> | <b>28%</b>           | <b>13%</b>                   |
| Sourcing standards (origin, animal welfare/sustainability)                     | <b>14%</b> | <b>19%</b>           | <b>9%</b>                    |

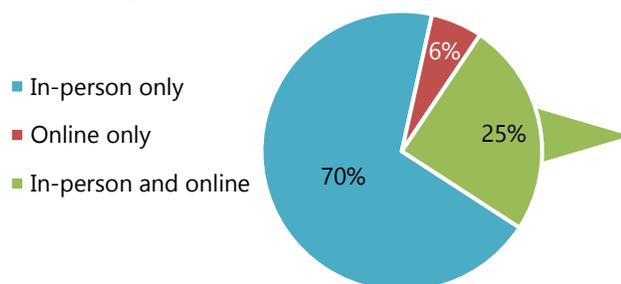
Well-off consumers include financially comfortable and secure.

◇ Over index ◇ Under index

## In-Store Meat and Poultry Purchases Remain Prevalent

Over the past year, 70% of households purchased meat and poultry exclusively in-store compared with 6% who bought only online. Gen Z and Millennials are more likely to shop online, either exclusively or alongside in-store trips. As sales continue to shift from Boomers to Gen Z and Millennials, their comfort with purchasing meat and poultry online signals sustained e-commerce growth.

### Purchasing meat and poultry



### Purchase meat/poultry in-store and online

- 20% Gen Z (15% shop online only)
- 38% Millennials
- 23% Gen X
- 8% Boomers



## Online Purchases Reflect a Smaller Range of Items

Among the 31% who order meat and poultry online, 18% are not comfortable ordering all items digitally and continue to rely on in-store trips for certain cuts. Gen Z and Millennials are more comfortable purchasing a broad range of meat and poultry types and cuts online.

**75%**

Of online meat/poultry shoppers would pay 5% extra for a butcher, meat associate or "certified picker" to select the best cuts/packages per their instruction

Interest in paying a 5% premium for an expert to select meat and poultry according to shopper instructions is very high, at 75% of online shoppers.

Steaks are the most commonly skipped items among online meat and poultry shoppers, including ribeye, sirloin, filet mignon and strip steaks, followed by roasts and pork chops.

Some shoppers draw a clear distinction between frozen or processed items and raw meat, avoiding all raw meat online, while others limit online purchases to familiar favorites and prefer to buy new or unfamiliar cuts in person.

### Examples of items not purchased online:

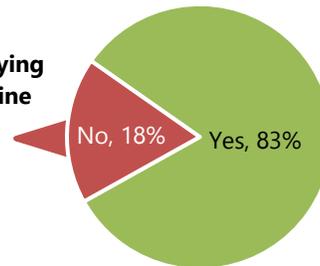


The larger the font, the more frequently the example was given.

## Comfortable buying all kinds and cuts of meat and poultry online?

### Not comfortable buying all meat/poultry online

- 12% Gen Z
- 16% Millennials
- 22% Gen X
- 25% Boomers



### Demographics of online meat/poultry shoppers:

- Gen Z and Millennials
- Higher-income households
- Households with kids, especially ages 7 to 18
- Urban and suburban dwellers

### Meat consumption and shopping patterns of online shoppers:

- Emphasis on convenient meat and poultry options, including value-added and fully-cooked
- Strong focus on nutrition, claims-based and branded meat
- Elevated concern over animal welfare and the planet

### INDUSTRY OPPORTUNITIES:

- Win the store choice decision, not just the product decision, with cleanliness and reliable in-stock position being critical secondary differentiators. Maintaining strong fundamentals is essential.
- Differentiate through in-store experiences, specialty cuts, local sourcing and exclusive promotions to retain shoppers and capture both total store and meat department trips.
- Optimize channel-specific promotions, recognizing that channel choice is influenced by price sensitivity and value perceptions.
- Invest in online confidence with curated "expert pick" options, clear product descriptions and quality guarantees to reduce hesitation, particularly for higher-value items like steaks, roasts and pork chops.
- The high interest in paying a 5% premium for expert-selected meat highlights an opportunity in offering concierge-style online services and bundling guidance to increase conversion, trial and basket size.
- Gen Z and Millennials are driving the growth in e-commerce. Align marketing, promotions and product assortment to their preferences to maximize reach and engagement.



# Full-Service Counters

## KEY INSIGHT:

Even when it is not their primary store, nearly three-quarters of meat shoppers patronize retailers with full-service counters. Actual usage may be limited, but the presence of a counter carries strong symbolic value, reinforcing perceptions of quality, freshness and access to special cuts or occasion-driven purchases.

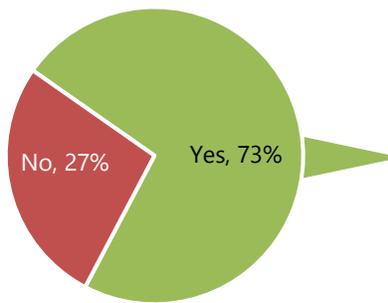
## Service Counters Can Be a Difference Maker

Despite dollars and trips shifting toward everyday value channels, most consumers continue to purchase meat and poultry across two to three channels. For 73%, this mix includes at least one store with a full-service counter, which is considered crucially important by 21% of these shoppers.

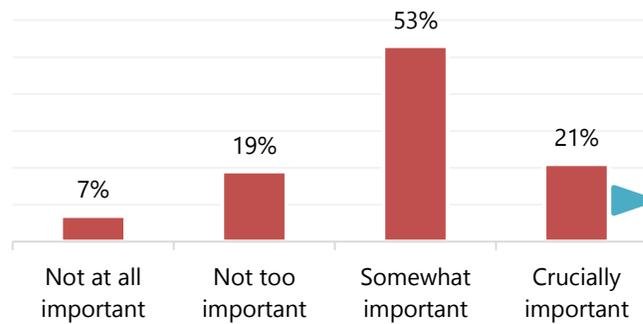
**Among consumers who currently don't shop at any stores with a counter (n=444):**

- 34%** Are fine with having no counter
- 52%** Believe counter service would be nice to have
- 14%** Would love to have counter service

**Service counter presence any of the stores you shop for meat/poultry**



**Role of the full-service counter in decisions to purchase meat/poultry at that store**



**Crucially important**

- 18%** Gen Z
- 19%** Millennials
- 21%** Gen X
- 25%** Boomers

## Service Counter Importance Versus Usage Frequency

Among shoppers with access to a service counter, usage frequency varies widely. Some engage only for holidays or special occasions, while 25% use the counter a handful of times per year. While perceived importance increases with usage frequency, viewing a full-service counter as an important asset does not guarantee frequent use. The importance lies in the correlation between the counter and perceptions of high quality and freshness.

| Frequency of using the full-service counter          | 2026 | Counter is not at all/too important | Counter is somewhat important | Counter is crucially important |
|--|------|-------------------------------------|-------------------------------|--------------------------------|
| Never  | 12%  | 60%                                 | 2%                            | 0%                             |
| Mostly only during the holidays or special occasions | 15%  | 22%                                 | 11%                           | 9%                             |
| 1-2 times a year                                     | 12%  | 18%                                 | 14%                           | 0%                             |
| 4-6 times a year                                     | 13%  | 0%                                  | 18%                           | 17%                            |
| Once a month   | 15%  | 0%                                  | 28%                           | 13%                            |
| Every 2-3 weeks                                      | 15%  | 0%                                  | 9%                            | 22%                            |
| Weekly   | 12%  | 0%                                  | 12%                           | 22%                            |
| Every time I buy meat                                | 6%   | 0%                                  | 7%                            | 17%                            |

## Reasons for Using Full-Service Counters

The full-service counter plays a role in "special" missions, whether the occasion or the product. This includes beef/steak, special cuts, holidays and special occasions, quality grades and signature or custom marinated items. Secondly, the service-counter serves as an overflow for consumers who are unable to find the items they came in

for in the self-service case. Low importance is related to intermittent usage as a backup/safety net by lack of availability in the self-service case.

| Reasons for using the full-service counter (across all frequencies of use) | 2026 |
|--|------|
| Beef/steak   | 51%  |
| Couldn't find cut/kind of meat/poultry I wanted in self-serve              | 43%  |
| Special cut (thick-cut, coarse grind, etc.)                                | 43%  |
| Sales special/promotion  | 42%  |
| Special occasion (holidays, grilling out, etc.)                            | 41%  |
| Something that's not sold in self-serve                                    | 40%  |
| Different amount than available in self-serve                              | 32%  |
| Specialty grade/quality (prime)  | 31%  |
| Custom marinade/marinated items  | 16%  |
| Needed advice on how to cook something                                     | 15%  |
| Needed advice on which cut to buy  | 13%  |

These reasons reflect unplanned trips that could be resolved with operational excellence or assortment decisions in the self-service case. For instance, add higher-velocity counter items to the self-service case as well.

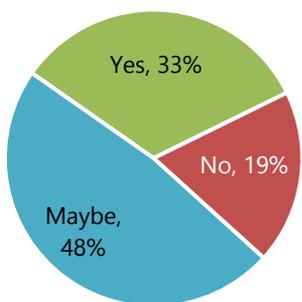
This points to a potential opportunity for one-on-one advice in the self-service area and online.

### Removing Service Counters Could Result in Loss of Trips and Dollars

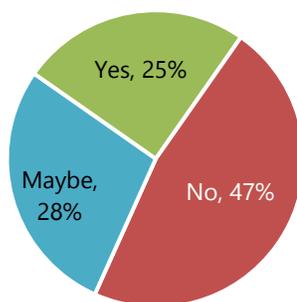
If a store were to remove its service counter, one-third of shoppers believe they would shift some meat and poultry purchases to another retailer, though fewer would move all of their meat or total grocery spending. The likelihood of switching increases with both counter usage and the perceived importance of having a service counter.

#### Actions taken if the store were to remove the full-service meat counter:

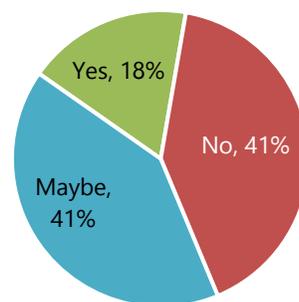
Start buying some meat/poultry at another store for custom cuts/requests



Start buying ALL meat/poultry at another store



Start buying ALL groceries (including meat/poultry) at another store



Groups that are more likely to divert some or all meat dollars tend to shop at butcher shops, purchase from specialty stores or shop natural/organic stores and supermarkets.

Removing counters without offering a clear service alternative or addressing their role in quality and freshness perceptions risks losing both department dollars and store trips.

#### Likely to divert some or all meat/poultry dollars

- Frequent counter users
- Service availability weighs into store selection
- Specialty and organic store shoppers
- Supermarket shoppers
- Boomers

## Service Alternatives Get Mixed Reviews

Maintaining current hours while reducing the size of the service counter is the most acceptable alternative, with 70% of shoppers viewing it as a fair or good option. Among time-based changes, reduced daily hours are far more acceptable than limiting counters to weekends or holidays, though Gen Z is notably more open to holiday-only availability. Replacing the counter with in-store kiosks or a “ring the bell” model resonates more broadly than app or website ordering, though younger shoppers show a stronger preference for app-based pre-ordering.

| Good alternative   | All | Gen Z | Millennials | Gen X | Boomers |
|--|-----|-------|-------------|-------|---------|
| Reduce the size of the counter   | 19% | 19%   | 26%         | 19%   | 7%      |
| Reduced daily hours  | 19% | 19%   | 26%         | 19%   | 9%      |
| Only open on the weekend   | 17% | 20%   | 24%         | 16%   | 6%      |
| Only open around holidays  | 17% | 31%   | 23%         | 13%   | 6%      |
| No service counter, but order ahead via an app/website                       | 18% | 24%   | 24%         | 17%   | 5%      |
| No service counter, but order in-store via a kiosk/ring the bell for service | 18% | 18%   | 23%         | 21%   | 8%      |

◇ Over index ◇ Under index

If counter service were limited or discontinued, 78% of consumers say they would like to be able to communicate with a butcher or meat expert in some other way, led by “ring the bell” or someone available in the self-serve area of the meat department.

Boomers are most likely to still want to have access to a person for custom orders.

| Access to a butcher/meat expert if counter service were limited/discontinued | All |
|--|-----|
| No, no need to talk to a butcher/meat expert                                 | 22% |
| Ring the bell for service  | 24% |
| Someone available in the self-serve area                                     | 17% |
| A meat helpdesk type service in store  | 10% |
| Live online/app chat   | 7%  |
| Question/request form on app/website   | 5%  |
| A meat hotline type service  | 5%  |
| Email request  | 5%  |
| AI or virtual reality butcher  | 4%  |

### INDUSTRY OPPORTUNITIES:

- Leverage full-service counters function as a *trust signal* as much as a transaction point. Even infrequent usage reinforces perceptions of quality, freshness and expertise, making counter presence disproportionately important to total store and department loyalty.
- Removing counters without a visible service substitute risks losing meat dollars and trips, particularly among shoppers who value special cuts, higher-quality grades and occasion-driven purchases.
- Counter strategy could shift from volume maximization to strategic availability. Smaller footprints, focused assortments and reduced daily hours preserve symbolic value while aligning labor with actual demand.
- Hybrid service models present a viable path forward. “Ring the bell” access, staff in the self-serve area and kiosk ordering maintain human expertise while meeting operational realities and evolving shopper expectations.
- Generational differences suggest a need for *dual-path solutions*. Boomers remain attached to human interaction and custom service, while Gen Z and Millennials are more open to app-based ordering and holiday-only availability, creating opportunities for flexible, segmented service models.
- Suppliers can support counter relevance by developing counter-exclusive cuts, signature marinades and premium or seasonal items that reinforce the counter’s role in special occasions and differentiation beyond price.



# Case Ready and Packaging

## KEY INSIGHT:

Consumers' perceptions of case-ready remained favorable, supported by solid interest in benefits such as extended shelf-life, freezer readiness and pre-portioned packages, such as saddle packs. Positive case-ready perceptions are driven by Gen Z and Millennials.

## Case-Ready Favorability Holds Steady

The majority of meat and poultry purchases occur in the self-service case. The survey assessed consumer quality perceptions, using the description "meat that is cut and packaged at a central location versus cut/packaged in the store itself" to avoid industry jargon.

Perceptions of centrally cut and packaged meat and poultry have improved markedly since 2008, the first year the question was asked. The share of consumers who believe these products are higher quality than in-store cut meat has risen from 9% in 2008 to 33% in 2026, while those holding negative quality perceptions declined to just 13%. Perception gaps remain generational, with Boomers accounting for most consumers who view centrally packaged meat as inferior quality.

**87%**

Case-ready is as good or better as meat cut and packaged in the store, up from:

**80%** 2018

**72%** 2013

**69%** 2009

**Case-ready is better quality (33% overall):**

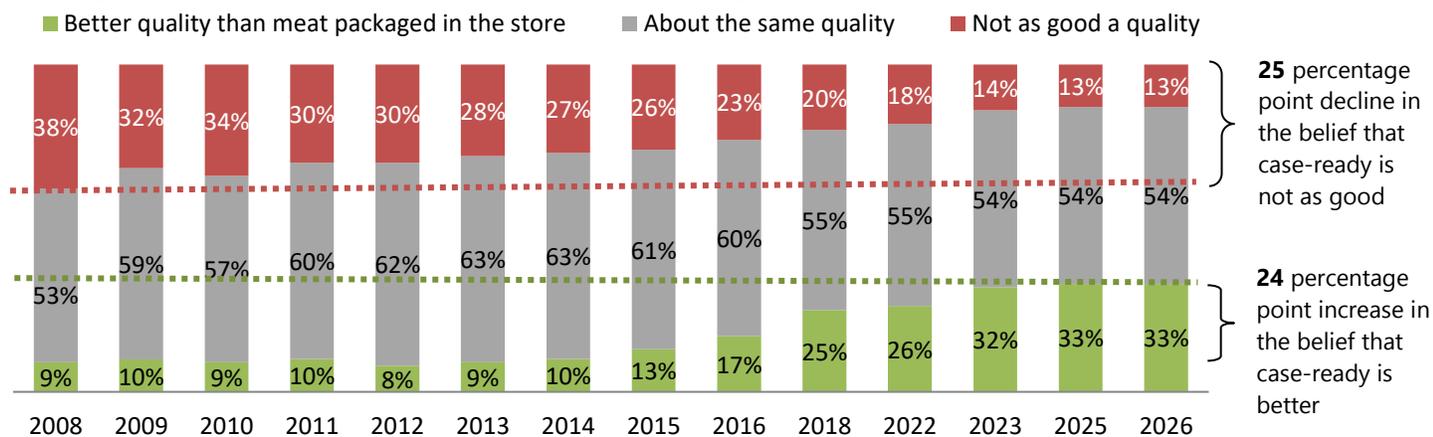
**37%** Gen Z

**37%** Millennials

**27%** Gen X

**17%** Boomers

## Quality perception of case-ready versus meat cut/packaged in the store



## Influence of Packaging on the Purchase

Consumers remain focused on shelf-life and minimizing food waste, which is one of the reasons behind the increase in meat and poultry trips seen over the past few years. Interest for most attributes held steady.

| Influence of packaging types on the meat purchase | No influence | A tiebreaker at best | A purchase priority | Priority in 2026 |
|---|--------------|----------------------|---------------------|------------------|
| Packaging that keeps the meat fresh/good longer   | 15%          | 45%                  | 41%                 | 41%              |
| Freezer-ready packaging                           | 21%          | 43%                  | 36%                 | 40%              |
| Bulk packages that are pre-portioned              | 25%          | 40%                  | 35%                 | 37%              |
| Packaging made from recyclable materials          | 31%          | 42%                  | 27%                 | 27%              |
| Packaging that can be composted                   | 36%          | 38%                  | 26%                 | 27%              |

**INDUSTRY OPPORTUNITY:** Communicate benefits from the consumer point-of-view, such as preventing freezer burn, added days in the refrigerator or minimizing waste to aid adoption and prompt purchase priorities.

# Meat and Health

## KEY INSIGHT:

Health is a key consideration in food decisions, and more than three-quarters of consumers believe meat and poultry are part of a healthy, balanced diet. Eating meat and poultry remains the norm, with just 8% of Americans identifying as vegan, vegetarian or pescatarian. Consumers broadly recognize the nutritional and functional benefits of meat and poultry, particularly nutrient density, muscle support, satiety and being an overall healthy choice. However, consumers are uncertain about meat/poultry as a complete protein, carbohydrate content and cognitive health benefits.

**Focused on making healthy choices**

**Demographically**

- Financially comfortable
- High income
- Asian Americans
- Millennials
- Parents, especially of children ages 7-12

**Meat/poultry behaviors**

- Flexitarians, but also heavy meat consumers
- Heavy and growing focus on protein

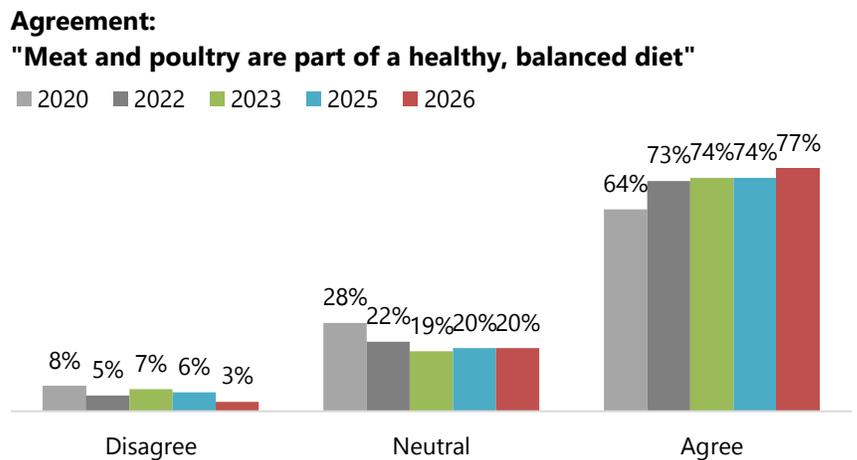
## Six in 10 Consumers Emphasize Making Healthy Choices

Six in 10 consumers say they put effort into making healthy and nutritious food choices. The emphasis on healthier eating increases alongside financial comfort and income and peaks among Millennial parents.

| Food attitude (somewhat + complete agree)               | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | Meat eaters | Flexitarians |
|---|------|------|------|------|------|------|-------------|--------------|
| I make an effort to choose healthy and nutritious foods | 68%  | 60%  | 63%  | 68%  | 61%  | 62%  | 60%         | 74%          |

## Rising Belief that Meat and Poultry Align With a Healthy, Balanced Diet

Agreement that meat and poultry are part of a healthy, balanced diet has increased by 13 percentage points since 2020, driven largely by more favorable views among Gen Z and Millennials. In 2020, 85% of Boomers agreed that meat and poultry belong in a healthy diet compared with just 50% of Gen Z. Today, agreement has risen to 67% among Gen Z and 79% among Millennials, significantly narrowing that generational divide.



## Eating Meat Is the Norm

Choosing from five options, 81% of Americans say "meat eater" best describes how they eat, unchanged from 2025. This makes "meat eater" by far the most common of the five eating lifestyles. Flexitarian eating peaked at 18% in 2021, while the meat eater share bottomed out at 73% that same year, aligning with the rise of plant-based meat alternatives.

Source: 210 Analytics, January 2026, CPG Client Research, Grocery Shopping Perceptions and Realities, 2015-2025, n=5,000



## Plant-Based Meat Alternative Sales and Engagement Continued to Fall

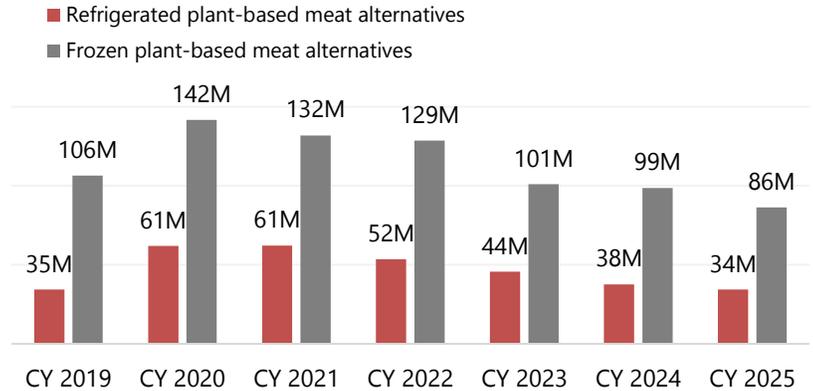
Combined refrigerated and frozen plant-based meat alternative sales fell below \$1 billion in 2025, marking another year of double-digit declines in dollars, units and volume. Pound sales peaked in 2020, and volume for both refrigerated and frozen alternatives has now dropped below 2019 levels.

| Combined refrigerated and frozen plant-based meat alternatives | 2025 sales | Change vs. YA |
|--|------------|---------------|
| Dollar sales   | \$956M     | -10.2%        |
| Unit sales   | 154M       | -11.1%        |
| Volume sales   | 121M       | -11.5%        |

Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 12/28/2025

Retailers continued to reduce plant-based meat alternative assortments, averaging nine refrigerated items per store in 2025, down from 14 in 2021. Frozen assortments averaged 25 items, down from 30 in 2021.

### Pound performance of plant-based meat alternatives



Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 12/28/2025

Fewer than 6% of U.S. households purchased refrigerated plant-based meat alternatives in 2025, down 3.7% year-over-year. Household penetration has declined 35.3% since 2022. Additionally, purchasing households bought less frequently in 2025, resulting in an 8% drop in annual spend.

### Refrigerated plant-based meat alternatives 2025 shopping dynamics



Households buying

**5.8% | -3.7%**



Annual trips/buyer

**4.2x | -11.3%**



Dollars per trip

**\$9.17 | +3.7%**



Annual dollars per buyer

**\$33.77 | -8.0%**

Source: Circana, Integrated Fresh, Household Panel, Total US, All outlets, 2025 and comparison versus YA



## Meat and Poultry Are Widely Viewed as Nutrient-Dense and Feel-Good Foods

A steady 73% of consumers view meat as an overall healthy choice and consider meat and poultry to be nutrient powerhouses. Health perceptions are somewhat lower among flexitarians, who consume meat only a few days per week. Millennial perceptions have improved markedly in recent years and Gen Z agreement rose three percentage points from last year. Beyond physical health, 76% of consumers say they feel better when including meat and poultry in their diets. Nearly 80% recognize meat and poultry for their contribution to physical strength and muscle health. For each statement, fewer than 5% of consumers disagreed.

### Overall healthy choice % agree

**62%** Gen Z  
**75%** Millennials  
**72%** Gen X  
**76%** Boomers

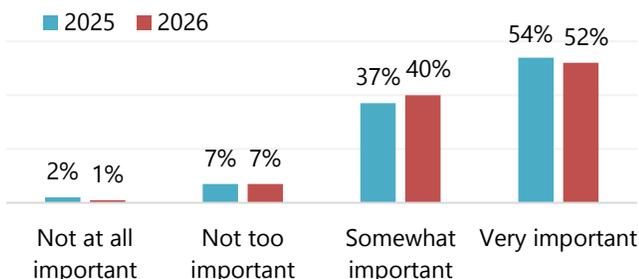
### Consumer agreement (% somewhat and completely agree)

| Meat/poultry are all-around nutrient powerhouses | Meat/poultry are overall a healthy choice for me | I feel better when I include meat/poultry in my diet | Meat and poultry are important for physical strength and muscle health |
|--|--|--|--|
| <b>73%</b>                                       | <b>73%</b>                                       | <b>76%</b>   | <b>79%</b>   |
| 61% Flexitarians<br>75% Meat eaters              | 58% Flexitarians<br>75% Meat eaters              | 59% Flexitarians<br>78% Meat eaters                  | 71% Flexitarians<br>80% Meat eaters                                    |
| Disagree: 4%                                     | Disagree: 5%                                     | Disagree: 4%   | Disagree: 4%   |

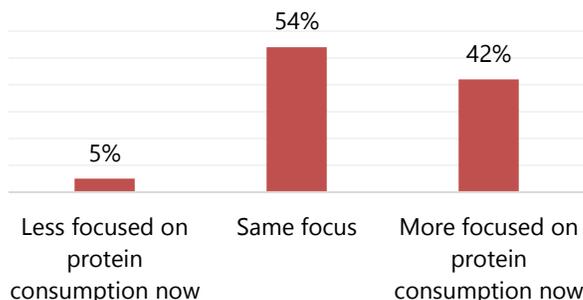
## The Nation's Eye Is on Protein

More than half of consumers say getting enough protein in their daily diet is very important, with an additional 40% describing it as somewhat important. Protein carries broad importance across ages, income levels, regions and ethnicities, and 42% of consumers say they are more focused on protein consumption today than they were five years ago.

### The importance of getting enough protein in your daily diet



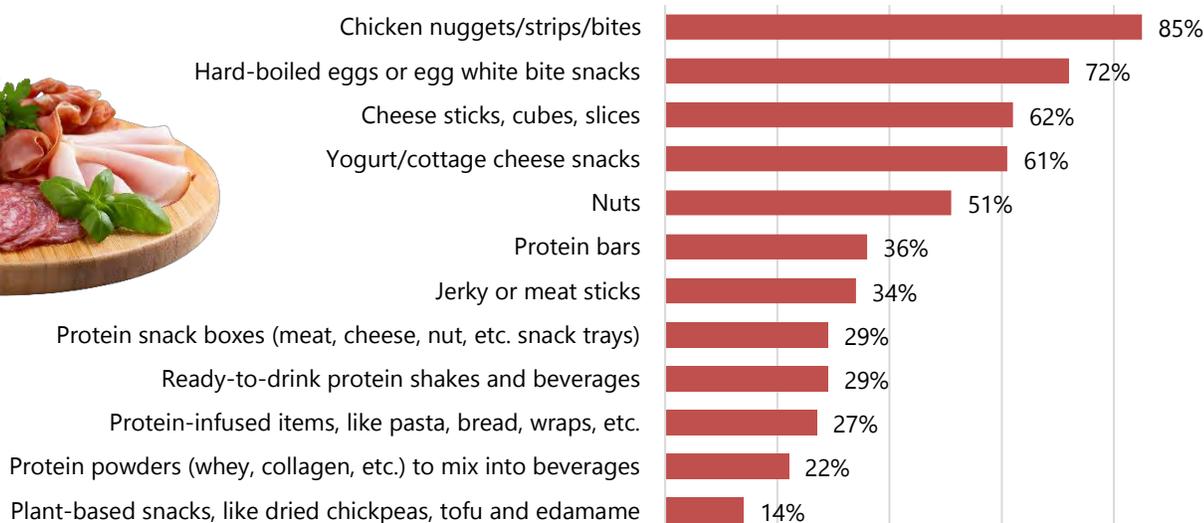
### Change in focus on consuming protein compared with five years ago



## Animal-Based Sources Anchor Protein Snacking

When it comes to snacking, consumers engage with a wide range of protein sources, from chicken nuggets and hard-boiled eggs to protein shakes and bars. Animal-derived protein snacks show higher engagement than plant-based options such as nuts, dried chickpeas or edamame.

### Protein sources regularly consumed during snack occasions



**5-6**

Average number of sources of protein for snacks and beverages

**8-9**

Average among Gen Z and Millennials, who over-index for protein bars, shakes, meat snacks, protein snack boxes, powders and protein-infused items.

Younger generations named a wider range of protein sources, many of which grew by double-digits over the past year, according to Circana.

| 2025 sales vs. 2024 | Frozen processed chicken | Eggs  | Cheese | Yogurt | Cottage cheese | Nuts  | Protein bars | Meat snacks | Protein snack boxes |
|---------------------|--------------------------|-------|--------|--------|----------------|-------|--------------|-------------|---------------------|
| Unit sales vs. 2024 | +8.4%                    | +0.7% | +1.3%  | +6.5%  | +14.2%         | -1.3% | +4.2%        | +5.1%       | +2.7%               |

Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 12/28/2025

## Learning from the Competition: Communicate About Protein Content and Benefits

Protein bars, ready-to-drink beverages and supplements excel at clearly communicating protein content and functional benefits, offering an important lesson for meat and poultry. These products are more likely to replace traditional snacks like chips or candy than they are to replace meat and poultry. Still, with 56% of consumers saying protein bars, beverages or snacks sometimes (42%) or always (14%) replace meat or poultry, their impact on meal occasions should not be overlooked, particularly among Gen Z and Millennials.

| Do these types of high-protein snacks, bars or beverages...?                                       | Never | Sometimes | Always | Always Gen Z | Always Boomers |
|--|-------|-----------|--------|--------------|----------------|
| Make it easy to understand the protein content and benefits  | 9%    | 58%       | 33%    | 43%          | 21%            |
| Replace traditional snacks, like chips or candy  | 16%   | 67%       | 17%    | 15%          | 8%             |
| Replace meat/poultry with dinner/main meals (such as a protein bar instead of chicken with dinner) | 45%   | 42%       | 14%    | 21%          | 2%             |

◇ Over index ◇ Under index

## Consumer Perceptions About Protein Types and Benefits

Consumers broadly recognize the nutritional and functional benefits of meat and poultry. Across nearly all attributes, roughly eight in 10 consumers believe the stated health benefits are true, either with certainty or intuitively. This indicates strong baseline confidence in meat and poultry as nutrient-dense foods that support muscle, satiety and overall health. Negative perceptions are minimal, with outright false ratings consistently low (1%-5%). Yet, the lack of clarity indicates opportunity for strengthening consumer knowledge.



| Consumer views/perceptions on health benefits of meat and poultry based on existing knowledge                               | Definitely false | Not sure, but I think false | Not sure, but I think true | Definitely true |
|---|------------------|-----------------------------|----------------------------|-----------------|
| Meat/poultry can help maintain muscle   | 2%               | 6%                          | 37%                        | 55%             |
| Meat/poultry can help with muscle development   | 1%               | 7%                          | 36%                        | 55%             |
| Lean meat/poultry are recommended for a nutritious diet   | 1%               | 8%                          | 37%                        | 53%             |
| Meat/poultry can help you feel full longer  | 2%               | 10%                         | 36%                        | 53%             |
| Red meat delivers iron and zinc the most available for the body to absorb   | 2%               | 10%                         | 43%                        | 45%             |
| Meat/poultry can support brain health   | 2%               | 11%                         | 44%                        | 43%             |
| Ounce-to-ounce, meat and poultry naturally offer higher quality protein per calorie than most solely plant-based protein    | 2%               | 14%                         | 42%                        | 42%             |
| Meat/poultry can help with weight management or loss  | 4%               | 16%                         | 41%                        | 40%             |
| Meat/poultry are a complete protein source, providing all essential amino acids   | 3%               | 15%                         | 45%                        | 37%             |
| Some sources of animal protein are higher-quality, more complete and more digestible than other non-animal protein sources. | 2%               | 18%                         | 43%                        | 37%             |
| All meat and poultry contain high-quality protein   | 5%               | 18%                         | 42%                        | 35%             |
| Plain meat/poultry (unseasoned) are naturally carb-free   | 5%               | 25%                         | 39%                        | 31%             |

Consumer understanding of meat and poultry's health benefits is strongest when benefits are functional, tangible, and directly experienced. Outcomes such as supporting muscle development and maintenance, and helping people feel full longer, receive the highest levels of "definitely true" agreement. These attributes align closely with how consumers intuitively think about protein-forward eating, reinforcing meat and poultry's established role in the diet. Knowledge is particularly strong around protein quality.



Most consumers recognize meat and poultry as sources of complete, high-quality protein, though confidence varies. Approximately four in 10 consumers indicate they believe this to be true but are not fully certain. This suggests broad awareness alongside uneven depth of understanding rather than fundamental skepticism. Knowledge gaps persist around specific nutritional facts. Attributes such as being naturally carb-free or offering higher-quality protein per calorie than most solely plant-based options show lower “definitely true” agreement and higher uncertainty.

Meat’s role beyond muscle is gaining recognition, but remains underdeveloped. Benefits related to brain health and weight management are widely believed but with lower certainty than muscle-related claims. These represent emerging territories where clearer education could strengthen meat and poultry’s health halo.

### Protein Is Top of Mind, While Iron and B-Vitamins Hold Potential

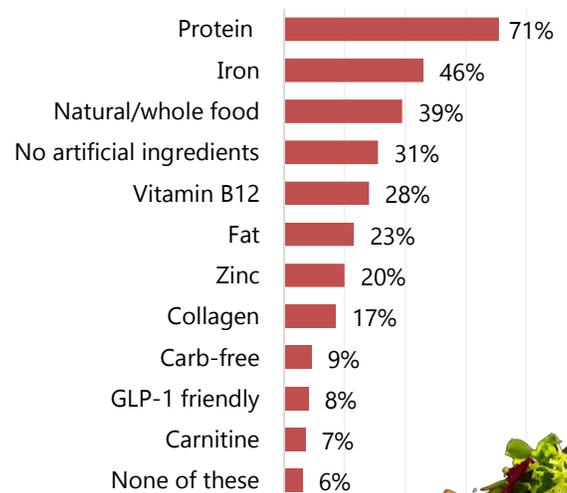
More than nine in 10 consumers prioritize one or more health attributes when purchasing meat and poultry. Unsurprisingly, protein is the most commonly prioritized attribute, cited by 71% of consumers. A second tier of health attributes, including iron, being a natural or whole food, the absence of artificial ingredients and B-vitamins, represent an opportunity to further elevate the perceived health benefits of meat and poultry beyond protein alone.

Emphasizing meat and poultry as natural foods with no artificial ingredients provides a broad, foundational benefit, while iron and vitamin B12 are powerful supporting messages that can further reinforce and prioritize consumption.

#### Top 3 attributes by generation

| Gen Z   | Millennials | Gen X   | Boomers       |
|---------|-------------|---------|---------------|
| Protein | Protein     | Protein | Protein       |
| Iron    | Natural     | Iron    | No artificial |
| Natural | Vitamin B12 | Natural | Iron          |

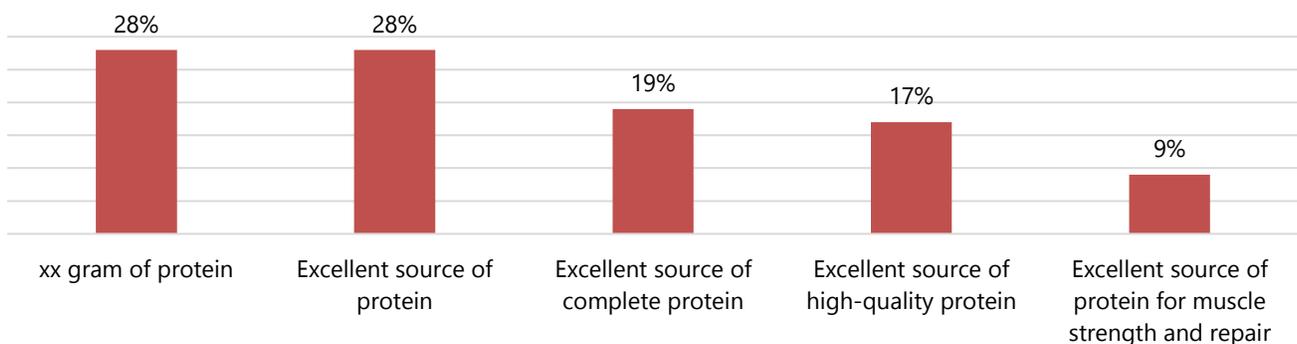
#### Prioritized attributes when thinking about health benefits of meat and poultry



### Highlight Protein Grams or Being an Excellent Source of Protein

There is no clear consensus on the preferred way to display nutrition information on meat and poultry packages. Using protein as an example, 28% of consumers prefer to see the actual number of grams, while an equal share favor a callout identifying the product as an excellent source of protein. Another 19% prefer highlighting meat and poultry as an excellent source of complete protein. Preferences are consistent across demographic groups.

#### Using protein as an example, perceived best way to display nutrition information on-pack



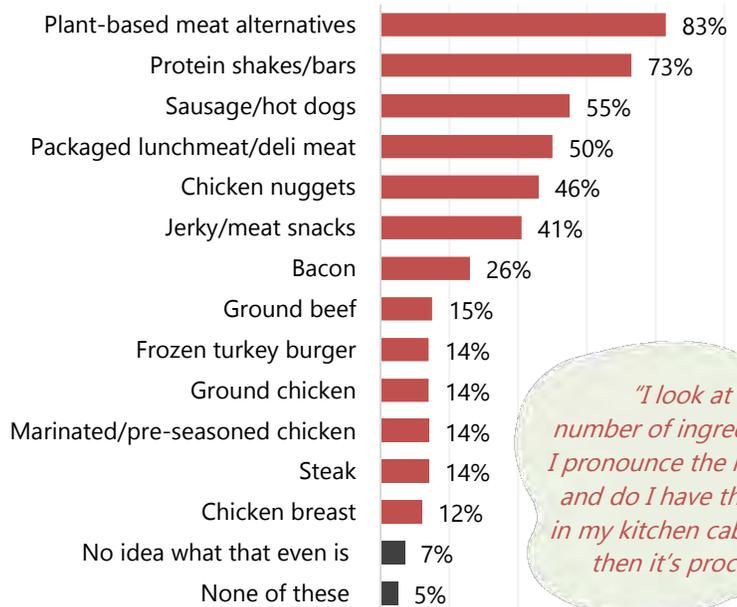
## “Ultra-processed” Perceptions Are In the Eye of the Beholder

The term “ultra-processed” has entered the mainstream, with only 7% of consumers unfamiliar with the term.

Among a list of 13 protein-containing products, plant-based meat alternatives are most frequently viewed as “ultra-processed”. Within animal-based proteins, sausage, hot dogs and lunch or deli meats rank highest on “ultra-processed” perceptions, while bacon appears much further down the list.

By contrast, items such as steak, ground beef and chicken breast are rarely considered “ultra-processed.” Notably, practices such as grinding, freezing or adding marinades or seasoning do not increase “ultra-processed” perceptions among consumers.

### Considered to be “ultra-processed” by consumers



*“I look at the number of ingredients, can I pronounce the ingredients and do I have these items in my kitchen cabinet. If no, then it’s processed.”*

For more information on “ultra-processed” please visit:  
[https://www.meatinstitute.org/sites/default/files/documents/GuidetoMeatProcessing\\_final.pdf](https://www.meatinstitute.org/sites/default/files/documents/GuidetoMeatProcessing_final.pdf)

### INDUSTRY OPPORTUNITIES:

- Reinforce meat and poultry’s role in a healthy, balanced diet through messaging and visuals that reflect a balanced eating approach. Ensure that meat and poultry populate when consumers search for “protein” in online shopping platforms by including it in product descriptions.
- Help consumers move from protein awareness to full confidence around complete protein, digestibility and protein quality.
- Expand beyond the more commonly-recognized muscle health and satiety benefits to include increased awareness around iron, B-vitamins and complete protein contribution.
- Use packaging, shelf tags and online descriptions to clarify, not overwhelm. Simplicity and consistency across platforms are critical as consumers navigate increasingly complex nutrition messaging.
- Leverage snacking as a growth occasion for animal protein by further positioning meat and poultry as satisfying, functional snacks that compete with protein bars and beverages, while delivering satiety, real-food credentials and protein quality.
- With growing focus on “ultra-processed” foods and beverages, reinforce the simplicity of meat and poultry, including ground, frozen and seasoned items.
- Re-engage flexitarians by emphasizing taste, nutrition, naturalness and value as household engagement and sales of plant-based meat alternatives continue to shrink.



# Meat and GLP-1 Consumers

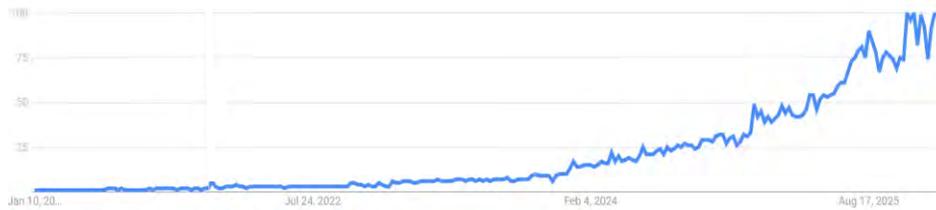
## KEY INSIGHT:

GLP-1 medications dominated the headlines in 2025, reflecting growing usage and cultural awareness. GLP-1 users are highly focused on protein, including meat/poultry.

## Growing Consumer Interest in GLP-1 Medications

GLP-1 Google searches have increased from virtually non-existent in 2020 to a substantial and growing number as of January 2026.

### Google Trends: GLP-1 | Five years ending January 2026



## GLP-1 Consumers and the Power of Meat

### Consumer profile

Out of 1,657 Power of Meat 2026 respondents, 217 or 13.1% currently use GLP-1 medications. Both GLP-1 usage and the user profile closely match a January 2026 GLP-1 study among more than 8,000 consumers by conducted 210 Analytics (see callout box).

The indexes below show perceptions and habits among GLP-1 users in the Power of Meat study. For example, an index of 152 means older Millennials are about 50% more likely than the general population to use GLP-1 medications.

Index Population group | Indexed to the general population

- 152** Older Millennials ages 36-45
- 136** Households with children ages 0-18
- 132** Urban areas
- 127** Higher-income households
- 110** Women

### Meal philosophies

Heavily over-indexing for Millennial women, GLP-1 users' meal habits and food philosophies closely mirror those of Millennials in general.

Index Population group | Indexed to non-GLP-1 users

- 140** Very interested in high-protein recipes and meal ideas
- 128** Protein focus has increased compared with five years ago
- 123** Like buying from companies that give back to people and communities
- 122** Focused on making sustainable choices (food, packaging, etc.)
- 120** Getting enough protein is very important
- 118** Love trying new types of foods and cuisines
- 116** Make an effort to choose healthy and nutritious foods
- 114** Value transparency



## 13.3%

Share of the U.S. population currently using GLP-1 medications, such as Ozempic, Wegovy and Mounjaro.

Source: 210 Analytics | January 2026

## 56.3%

Take GLP-1 medications primarily for weight loss purposes

Source: 210 Analytics | January 2026

General food and beverage behaviors:

- Reduced appetite and focus on smaller portion sizes.
- Greater focus on protein, nutrient density and satiety.
- Fewer impulse and indulgent eating occasions.
- Rarely eliminating foods, but eating less and being more intentional when eating.

Source: 210 Analytics | January 2026

### GLP-1 Medication user profile

- Women slightly over-index at 112
- Usage peaks among older Millennials, indexing at 148 for consumers ages 36-45
- Households with children at home over-index at 140
- Usage skews toward higher-income consumers, over-indexing at 135.

Source: 210 Analytics | January 2026  
Among 8,078 U.S. consumers

## Meat consumption

GLP-1 consumers are significantly more likely than non-users to frequently consume meat and poultry, particularly at breakfast and for snacking occasions. While many report increasing their meat and poultry intake over the past year, they also engage with other high-protein products, which at times serve as substitutes rather than complements to meat and poultry.

Index Population group | Indexed to non-GLP-1 users

- 230** Consumption of protein bars, beverages, powders, supplements, etc. often/always replace meat/poultry for dinner or other main meal occasion
- 171** Frequently include meat and poultry in snacking occasions
- 161** Eat somewhat or a lot more meat than last year, driven by an enhanced focus on protein and health
- 129** Heavy meat eater, including meat “frequently” across meal occasions
- 122** Frequently include meat/poultry for breakfast (lunch: 102 and dinner: 93)

## Meat perceptions and knowledge

GLP-1 consumers are more knowledgeable about protein in general and meat/poultry, specifically. They also think more favorably of meat and poultry’s health contributions than non-GLP-1 consumers.

Index Population group | Indexed to non-GLP-1 users

- 128** Agree with meat/poultry being higher-quality, more complete and more digestible than plant-based protein
- 117** Agree with meat/poultry naturally being carbohydrate-free
- 116** Agree with red meat delivering iron and zinc in a way that is easy for the body to absorb
- 114** Agree with meat and poultry supporting brain health
- 110** Agree with meat and poultry helping one feel full longer (satiety)
- 111** Meat and poultry are all-around nutrient powerhouses
- 111** I feel better when I include meat and poultry in my diet
- 110** Meat and poultry are an overall healthy choice for me

According to Circana, new patient prescriptions increased 16% year-over-year in 2025, reflecting an additional 2.9 million scrips. As consumers move in and out of active GLP-1 use, many are sustaining the healthier behaviors they adopted, while others revert to pre-medication habits. Maintaining clarity on these diverging behavioral paths will be important for anticipating long-term demand patterns. For an FMI one-pager on GLP-1s, please visit: <http://www.fmi.org/glp-1>.

### INDUSTRY OPPORTUNITIES:

- Position meat and poultry as GLP-1–friendly protein solutions, emphasizing satiety, nutrient density and protein quality per bite, benefits that align with smaller portions and protein-first eating habits.
- Lean into breakfast and snacking occasions, where GLP-1 users over-index most strongly. Portable, portion-appropriate meat and poultry formats can directly compete with protein bars, supplements and beverages.
- Reinforce meat and poultry’s credentials as real foods with digestibility and micronutrient advantages versus “ultra-processed” protein options.
- Target GLP-1 consumers with tailored messaging, blending protein, health, transparency and values-driven cues, including sustainability and brand purpose.
- Plan for long-term behavioral shifts, not just active use, recognizing that some GLP-1 users sustain protein-forward habits after discontinuation. Clear, consistent education can help anchor meat and poultry as part of those lasting routines.
- Consider innovations in meal solutions that focus on nutrient density, protein content and smaller portions.



# Meat Raising & Sourcing Practices

## KEY INSIGHT:

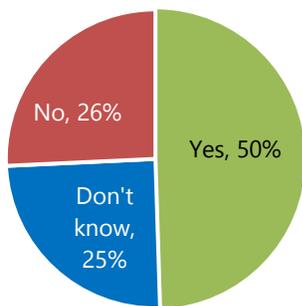
About half of consumers believe animals are generally raised humanely in the U.S., while roughly four in 10 trust that their primary grocery stores are committed to sourcing humanely raised meat and poultry. Rather than outright skepticism, uncertainty accounts for much of the remaining share, signaling an opportunity for clearer communication and transparency. When animal welfare factors into purchasing decisions, it frequently steers shoppers toward claims-based meat and poultry offerings.

## Trust in U.S. Animal Welfare Is Steady, With Room to Improve

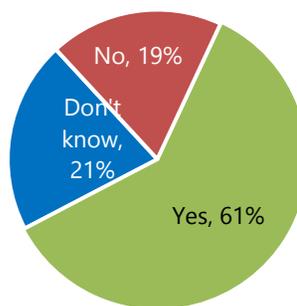
Public perceptions of animal welfare in the U.S. remain steady, with about half of consumers believing animals are raised humanely, significantly outweighing the share who hold negative views. More than six in 10 trust that farmers balance business interests with animal welfare. Confidence extends to retail as well, with more than four in 10 shoppers believing grocery stores are committed to sourcing humanely raised meat and poultry.

Still, certainty is not universal. Roughly one-quarter of consumers and one-third of Gen Z remain undecided about both on-farm practices and retailers' sourcing standards. This sizable "uncertain middle" signals that while outright skepticism is limited, trust is often assumed rather than fully informed, leaving room for clearer communication, transparency and education to strengthen confidence further.

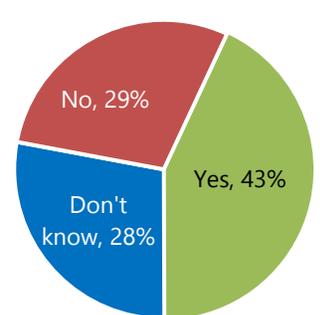
**Think that animals are raised in a humane way in the U.S.**



**Trust farmers to appropriately balance business interests with animal welfare**



**Think grocery stores are committed to selling humanely-raised meat/poultry**



## Animal Welfare Seen as Influencing Taste

Humane treatment of animals is not only viewed as the right thing to do, but also as a driver of product quality. Two-thirds of consumers believe that animals raised with care and compassion produce better-tasting meat and poultry. This perceived connection between animal welfare and taste is particularly strong among Millennials.

| Belief that animals raised with care and compassion result in better-tasting meat and poultry | All | Gen Z | Millennials | Gen X | Boomers |
|---|-----|-------|-------------|-------|---------|
| Yes   | 66% | 63%   | 73%         | 65%   | 58%     |
| Don't know  | 20% | 14%   | 11%         | 24%   | 29%     |
| No  | 15% | 23%   | 16%         | 11%   | 13%     |

◇ Over index   ◇ Under index

## Prioritization of Animal Handling and Raising Practices

Animal handling and raising considerations influence meat and poultry purchases for four in 10 consumers, with attributes such as provenance, the use of hormones and/or antibiotics, and grass-fed claims factoring into

decisions. Humane, free-range, pasture-raised and organic production practices are purchase priorities for around 30% of shoppers. Financial strain often leads to where and how animals are raised and handled being a lower priority. In contrast, financially comfortable and secure consumers over-index across nearly all attributes.

| Purchase priorities for animal handling/raising | 2026 | Gen Z | Millennials | Gen X | Boomers | Financially well-off | Financially tight/struggling |
|---|------|-------|-------------|-------|---------|----------------------|------------------------------|
| Raised in the U.S.                              | 44%  | 36%   | 38%         | 43%   | 52%     | 47%                  | 23%                          |
| No added hormones                               | 43%  | 35%   | 39%         | 46%   | 51%     | 45%                  | 42%                          |
| Grass fed                                       | 40%  | 37%   | 45%         | 40%   | 35%     | 43%                  | 35%                          |
| No antibiotics ever                             | 39%  | 27%   | 36%         | 39%   | 49%     | 44%                  | 37%                          |
| Humanely raised                                 | 34%  | 33%   | 39%         | 30%   | 25%     | 36%                  | 22%                          |
| Free range                                      | 32%  | 28%   | 37%         | 32%   | 25%     | 38%                  | 24%                          |
| Pasture raised                                  | 31%  | 26%   | 36%         | 30%   | 25%     | 39%                  | 22%                          |
| Organic   | 31%  | 36%   | 40%         | 27%   | 19%     | 39%                  | 15%                          |
| Cage or crate free                              | 27%  | 30%   | 29%         | 25%   | 22%     | 30%                  | 18%                          |
| None of these                                   | 13%  | 10%   | 8%          | 16%   | 18%     | 9%                   | 21%                          |

Well-off includes financially comfortable and secure      ◇ Over index      ◇ Under index

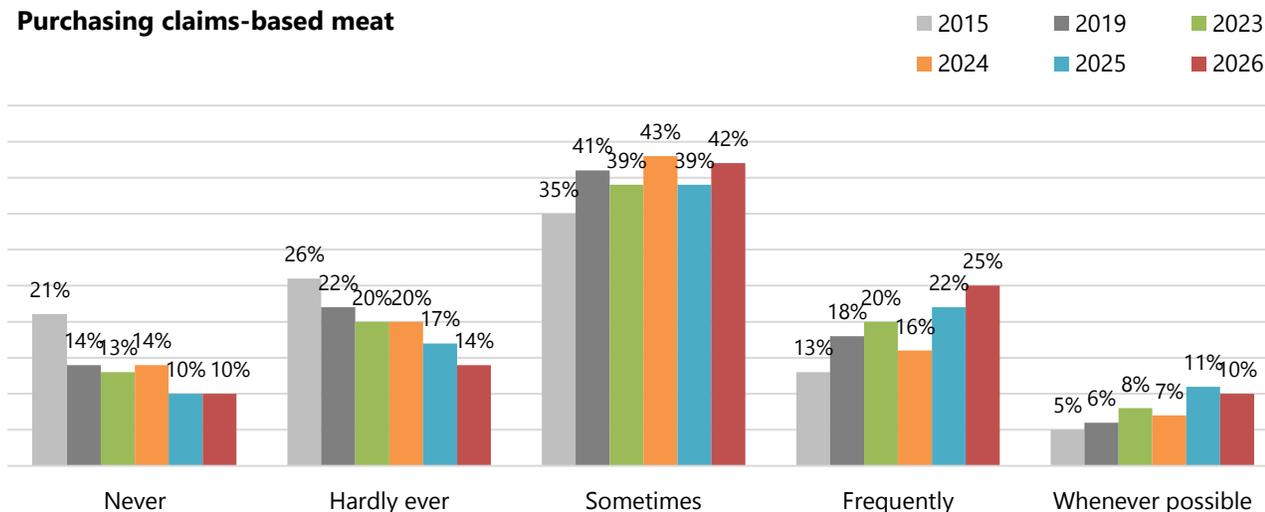
From a claims standpoint, organic remained an attribute with widely varying interest. For instance, organic is the second-highest attribute among Millennials versus the one of least consideration among Boomers.

| Meat and poultry purchase considerations by generation |                    |                    |                     |
|--|--------------------|--------------------|---------------------|
| Gen Z  | Millennials        | Gen X              | Boomers             |
| Grass fed  | Grass-fed          | No added hormones  | Raised in the U.S.  |
| Organic  | Organic            | Raised in the U.S. | No added hormones   |
| Raised in the U.S.                                     | Raised in the U.S. | Grass-fed          | No antibiotics ever |

### Rising Engagement with Claims-Based Meat

Consumer engagement with claims-based meat and poultry climbed to a new high in 2026, reflected in both household penetration and purchase frequency. The share of consumers who buy these products frequently or whenever possible has doubled since 2015, rising from 18% to 36%. At the same time, the proportion of shoppers who say they never or rarely purchase claims-based meat and poultry fell from nearly half of consumers (47%) in 2015 to just 24% today.

#### Purchasing claims-based meat



## Rising Engagements Mirrors Double-Digit Growth in Claims-Based Meat

Organic meat and poultry sales reached \$3.7 billion in 2025, up sharply from \$2.5 billion just three years earlier. Chicken continued to represent the largest organic protein segment, but beef is rapidly closing the gap after more than doubling sales since 2022.

Beef also drove much of the growth across antibiotic-related claims, including no antibiotics ever, although chicken sales in this segment remained more than twice the size of beef.

Grass-fed beef stood out as a particularly strong growth engine, delivering outsized gains in dollars, units and volume. Grass-fed ground beef alone posted a 42.3% increase in dollar sales in 2025. It is important to note that these production claims are not mutually exclusive. See Methodology for Circana definitions.

|                              | Dollar sales 2022-2025 |                |                |                | \$ growth     | 2025 Results  |               |
|------------------------------|------------------------|----------------|----------------|----------------|---------------|---------------|---------------|
|                              | 2022                   | 2023           | 2024           | 2025           |               | lbs growth    | Unit growth   |
| <b>Organic total</b>         | <b>\$2.5B</b>          | <b>\$2.6B</b>  | <b>\$3.0B</b>  | <b>\$3.7B</b>  | <b>+25.5%</b> | <b>+22.6%</b> | <b>+21.0%</b> |
| Beef                         | \$734M                 | \$817M         | \$1.0B         | \$1.5B         | +43.9%        | +36.5%        | +32.3%        |
| Chicken                      | \$1.5B                 | \$1.5B         | \$1.6B         | \$1.9B         | +16.1%        | +16.7%        | +14.0%        |
| Pork                         | \$9M                   | \$10M          | \$8M           | \$10M          | +25.7%        | +24.1%        | +33.8%        |
| Turkey                       | \$118M                 | \$118M         | \$133M         | \$153M         | +14.5%        | +13.3%        | +11.9%        |
| <b>All antibiotic claims</b> | <b>\$12.5B</b>         | <b>\$12.6B</b> | <b>\$13.2B</b> | <b>\$14.7B</b> | <b>+11.3%</b> | <b>+5.6%</b>  | <b>+6.6%</b>  |
| Beef                         | \$2.1B                 | \$2.2B         | \$2.6B         | \$3.3B         | +26.4%        | +18.9%        | +16.1%        |
| Chicken                      | \$7.8B                 | \$7.8B         | \$8.0B         | \$8.6B         | +8.6%         | +4.2%         | +5.7%         |
| Pork                         | \$188M                 | \$202M         | \$241M         | \$240M         | -0.6%         | -0.5%         | +0.1%         |
| Turkey                       | \$501M                 | \$491M         | \$491M         | \$537M         | +9.4%         | +2.1%         | +6.0%         |
| <b>Grass-fed total</b>       | <b>\$1.3B</b>          | <b>\$1.4B</b>  | <b>\$1.8B</b>  | <b>\$2.5B</b>  | <b>+37.3%</b> | <b>+32.0%</b> | <b>+27.8%</b> |
| Ground beef                  | \$874M                 | \$996M         | \$1.3B         | \$1.8B         | +42.3%        | +35.9%        | +30.5%        |

Source: Circana, Integrated Fresh, Total U.S., MULO+, 52 weeks ending 12/28/2025 and YA, 2YA and 3YA

### INDUSTRY OPPORTUNITIES:

- Strengthen trust in animal welfare through transparency. The opportunity is less about overcoming distrust and more about filling information gaps. Clear, accessible explanations of raising and handling practices, delivered on-pack, in-store and online, can help build trust.
- Communicate best-in-class animal welfare and sourcing practices to support premium positioning and justifying trade-ups.
- Claims-based products have moved from niche to mainstream consideration within the meat and poultry department. However, right-size animal welfare messaging and claims-based assortment by financial reality in advertising and merchandising to avoid alienating price-sensitive consumers.
- Use claims strategically to guide choice, not overwhelm. Simplifying and standardizing claims can help shoppers navigate the shelf more confidently and reduce confusion.
- Lean into generational differences to drive relevance. Aligning claims, storytelling and education with generational priorities can improve engagement without fragmenting the assortment.
- As brands or retailers, be a trusted curator of responsible sourcing. Communicate sourcing/raising standards and animal care commitments, reinforcing trust at the point of purchase.



# Animal Agriculture and the Planet

## KEY INSIGHT:

Many consumers take a thoughtful approach to food purchasing, with two-thirds wanting to know where their food comes from. Fewer consumers actively factor in the environmental impact of food production and packaging, though this consideration carries greater weight among younger generations. When sustainability does influence purchasing decisions, shoppers tend to gravitate toward brands, retailers and meat and poultry options that align with their values.

## Mindful Shopping Is Prevalent

Transparency about where the food comes from matters to two-thirds of Americans. This includes information about where the animals were raised alongside details about the how and who. Consumers' personal engagement with environmental sustainability is more muted. Just over half actively try to do their part for the environment, a share that has remained relatively stable since 2020.

This gap suggests that while sustainability and transparency are valued ideals, responsibility is often placed more heavily on brands and retailers than on individual behavior.

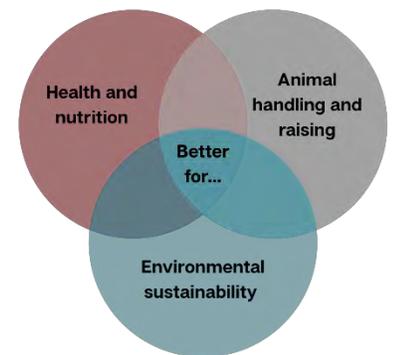
### Environmentally-conscious consumers:

- Flexitarians
- Those who highly value transparency
- Club and specialty/organic store shoppers
- Urban shoppers
- Millennials
- High-income households
- Financially-comfortable households
- Focused on their own health, animal welfare and social responsibility
- Purchase claims-based meat and poultry
- Prioritize manufacturer brands

| Agree somewhat or completely  | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|------|------|------|------|------|------|------|
| I like to know where my food comes from   | 64%  | 64%  | 63%  | 63%  | 64%  | 65%  | 67%  |
| I try to make choices that are better for the environment, including food and packaging | 56%  | 60%  | 51%  | 52%  | 55%  | 56%  | 53%  |

## Environmental Concerns Drive Interest in Production and Packaging Attributes

Like animal care and raising practices, environmental sustainability attributes can factor into meat and poultry purchase decisions. Locally- or regionally-sourced products are the most desirable sustainability-related attribute across the population. Packaging that uses less plastic is another attribute with broad appeal. Organic is the most desirable sustainability attribute among Gen Z and Millennials, who over-index for a number of claims. At the same time, consumers under financial strain are far less likely to prioritize environmental sustainability-related attributes.



There is significant overlap between consumers who prioritize health, sustainability and animal welfare.

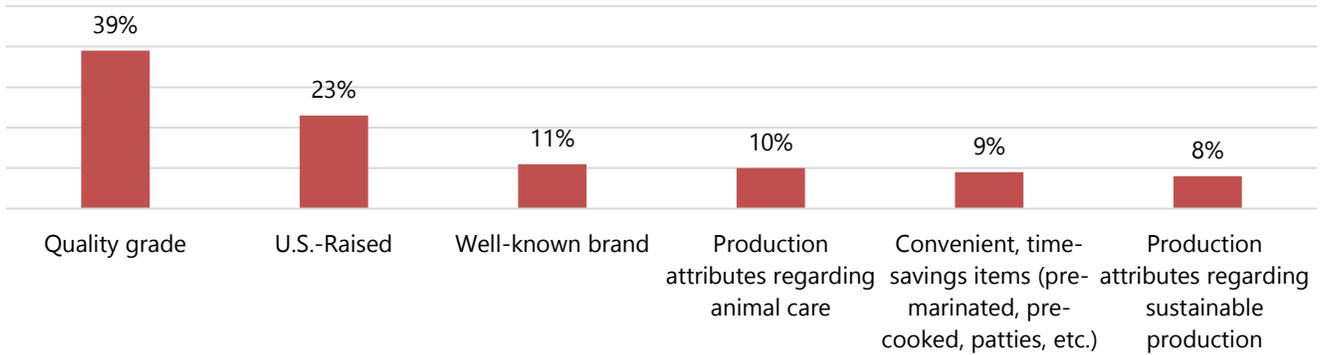
| Purchase priorities for better environmental sustainability | 2026 | Gen Z | Millennials | Gen X | Boomers | Financially well-off | Financially tight/struggling |
|---|------|-------|-------------|-------|---------|----------------------|------------------------------|
| Locally/regionally-raised                                   | 42%  | 30%   | 43%         | 41%   | 45%     | 38%                  | 35%                          |
| Organic   | 39%  | 46%   | 51%         | 32%   | 23%     | 47%                  | 28%                          |
| Packaging that uses less plastic                            | 34%  | 36%   | 36%         | 31%   | 35%     | 34%                  | 24%                          |
| Recyclable packaging  | 30%  | 37%   | 33%         | 26%   | 29%     | 33%                  | 17%                          |
| Regenerative agriculture                                    | 20%  | 26%   | 26%         | 18%   | 12%     | 27%                  | 13%                          |
| Carbon neutral  | 18%  | 22%   | 24%         | 15%   | 12%     | 26%                  | 9%                           |
| None of these   | 19%  | 12%   | 12%         | 25%   | 28%     | 16%                  | 32%                          |

◇ Over index ◇ Under index

## Ultimately, Quality Beats Animal and Planet Purchase Priority

When buying meat and poultry, consumers weigh a range of competing priorities, from affordability and value to animal welfare and environmental sustainability. Amid this constant balancing act, quality ultimately remains the deciding factor. Willingness to pay more for brands is highest among younger consumers, particularly Gen Z at 19%, while quality is the dominant driver for Boomers, cited by 44%.

### Most willing to pay extra for when weighing a range of competing priorities



### INDUSTRY OPPORTUNITIES:

- Tiered assortments and targeted communication can allow sustainability to scale without alienating value-driven shoppers. Provide clear, simple explanations of claims so consumers can easily weigh benefits against any price differential.
- Sourcing location and reduced-plastic packaging resonate more than complex or abstract claims such as carbon neutrality or regenerative agriculture. These attributes offer the strongest entry points for broad-based sustainability messaging.
- Consumers expect brands and retailers to be part of the solution. Sourcing information, packaging improvements and environmental efforts can build trust without asking shoppers to change behavior or make tradeoffs they may resist.
- Integrate sustainability into quality, the ultimate willingness to pay more, not as a tradeoff. Position sustainability initiatives as reinforcing product quality, freshness and care rather than competing with them.
- Leverage overlapping health, welfare and sustainability mindsets with unified messaging that connects environmental stewardship with humane raising practices and nutrient-dense food to create a more compelling, holistic value proposition than siloed claims.



# Methodology and Terminology

The survey was conducted between December 12 and 19, 2025, reflecting a maximum sampling error of  $\pm 2.5$  percentage points at the 95% confidence level. Respondents are between 18 and 75 years of age, primary or equally share the responsibility for food shopping, and are meat eaters or flexitarians. Pescatarians, vegans and vegetarians were disqualified. The regions mentioned in the report reflect the Census-defined areas.

## Eating lifestyle definitions

- Meat eater: eat meat and/or poultry most days of the week
- Flexitarian: plant-forward diet that includes eat meat/poultry some days

## Income definitions

- Lower income: <\$45,000 annually
- Middle income: \$45,000 - <\$75,000
- Middle-high income: \$75,000 - < \$125,000
- High income: \$125,000 or more

## Circana definitions

- MULO+ reflects at least 85% of the total meat spend in the marketplace, including grocery stores, mass, club, discounters, direct-to-consumer and other channels.
- Meat department: fresh and processed meat and poultry, including UPC (fixed weight and random-weight) and non-UPC items sold in the meat department. Excludes frozen food and center-store grocery aisles.
- Processed meat: franks, breakfast meats, smoked ham, bacon, packaged lunchmeat, heat-and-eat cooked meats and refrigerated entrees and side dishes sold in the meat and refrigerated departments.
- Fresh meat: raw refrigerated animal proteins and refrigerated plant-based meat alternatives.
- Value-added meat/poultry: product that has one additional step of preparation to that product's conventional state, such as meatballs, burgers and marinated chicken.
- Branded: carrying a manufacturer or private-brand label. Coded as non-branded are products that refer to the breed or grade, but not a brand.
- Conventional meat: all meat not carrying label claims.
- Organic claim: USDA organic
- Antibiotic claims: Combination of all antibiotics-related claims seen on pack, including antibiotic-free, no antibiotic ever (NAE), Never Any!, raised without the use of antibiotics, etc.
- Grass-fed: Includes all grass-fed claims, including grass-fed, grass finished, 100% grass-fed, etc.



# Respondent Profile

|                               |  | 2026        |
|-------------------------------|--|-------------|
| <b>All respondents</b>        |  | <b>100%</b> |
| <b>Gender</b>                 |  |             |
| Men                           |  | 44%         |
| Women                         |  | 55%         |
| Non-binary                    |  | 1%          |
| <b>Age</b>                    |  |             |
| Gen Z (18-26)                 |  | 10%         |
| Millennials (27-42)           |  | 36%         |
| Gen X (43-58)                 |  | 25%         |
| Boomers (59-75)               |  | 28%         |
| <b>Area</b>                   |  |             |
| Urban                         |  | 31%         |
| Suburban                      |  | 44%         |
| Small town                    |  | 9%          |
| Rural                         |  | 16%         |
| <b>Census region</b>          |  |             |
| Northeast                     |  | 19%         |
| Midwest                       |  | 23%         |
| South                         |  | 36%         |
| West                          |  | 22%         |
| <b>Household composition</b>  |  |             |
| No kids living at home        |  | 64%         |
| Kids ages 0-18 living at home |  | 36%         |

|                          |      |
|--------------------------|------|
| <b>Cultural heritage</b> |      |
| Caucasian                | 63%  |
| African American         | 12%  |
| Asian American           | 7%   |
| Hispanic/Latino          | 18%  |
| Other/decline to answer  | 0.5% |
| <b>Household size</b>    |      |
| 1 person                 | 19%  |
| 2 people                 | 36%  |
| 3 people                 | 15%  |
| 4 people                 | 20%  |
| 5+ people                | 10%  |
| <b>Household income</b>  |      |
| Less than \$45,000       | 28%  |
| \$45,000 - <\$75,000     | 24%  |
| \$75,001 - <\$125,000    | 20%  |
| More than \$125,000      | 26%  |
| Decline                  | 2%   |

