Quarterly Retail Reports and Trends

Q2 2026

Topics

- Retail Meat Performance – Circana Data
- Shopper and Performance Topline Insights Across Food and Beverage – Circana and Nielsen
- Grocer Strategies – McKinsey and Company
- Packaging, Claims, and Consumer Expectations - Datassential

The full source documents can be found on Teams at:

Retail Data Reports | Market/Consumer Insights

Retail Meat Sales Performance

Retail Performance – Meat Categories

- Beef continues to lead in growth
- Processed Meats and Value-Added struggling with volume recently

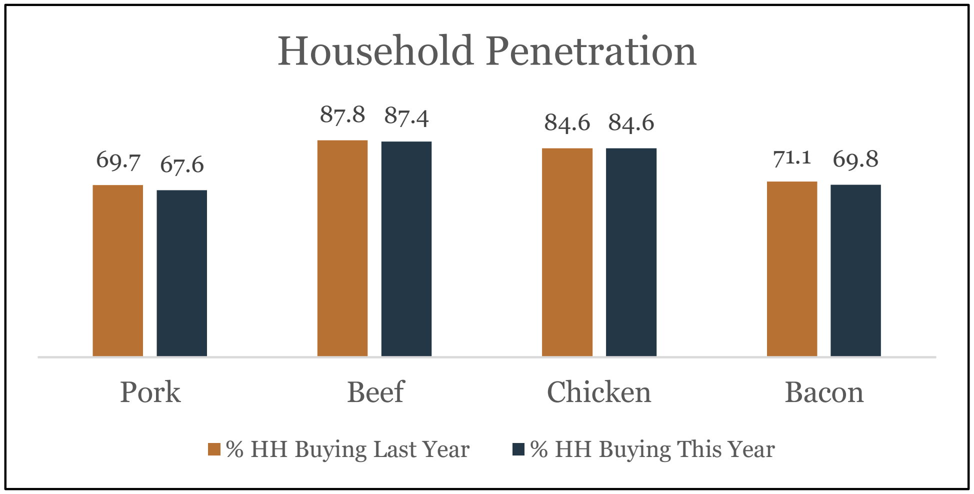
	52 Weeks				13 Weeks			
	Dollars	% Change vs. Last Year	Volume (lbs.)	% Change vs. Last Year	Dollars	% Change vs. Last Year	Volume (lbs.)	% Change vs. Last Year
Total Meat	$114,518,516,586	5.3%	23,638,156,463	0.9%	$28,771,263,619	2.0%	5,717,330,986	-2.1%
Fresh Meat	$82,102,214,011	7.1%	17,298,587,847	1.8%	$20,733,863,033	4.2%	4,182,671,403	0.1%
Pork	$8,800,388,360	2.3%	2,712,614,222	0.2%	$2,303,822,751	0.7%	709,857,272	-0.7%
Beef	$47,119,777,037	9.7%	6,335,402,349	2.1%	$12,051,509,119	6.2%	1,569,072,291	-0.3%
Chicken	$21,035,954,147	4.6%	6,787,258,450	3.0%	$5,302,834,639	2.0%	1,713,710,738	2.0%
FW Value-Added Pork Filets/Tenderloins	$283,931,924	0.8%	58,658,477	2.9%	$66,805,943	-7.1%	13,810,180	-7.3%
Processed Meat	$32,416,302,575	0.9%	6,339,568,616	-1.7%	$8,037,400,586	-3.2%	1,534,659,583	-7.6%
Pork Bacon	$6,548,056,227	-0.9%	1,037,033,189	-2.7%	$1,527,682,558	-6.1%	249,843,384	-3.7%
Ground Pork Sausage Chubs/Rolls	$1,119,046,370	2.6%	272,310,879	0.5%	$237,518,220	0.0%	56,058,700	-3.3%

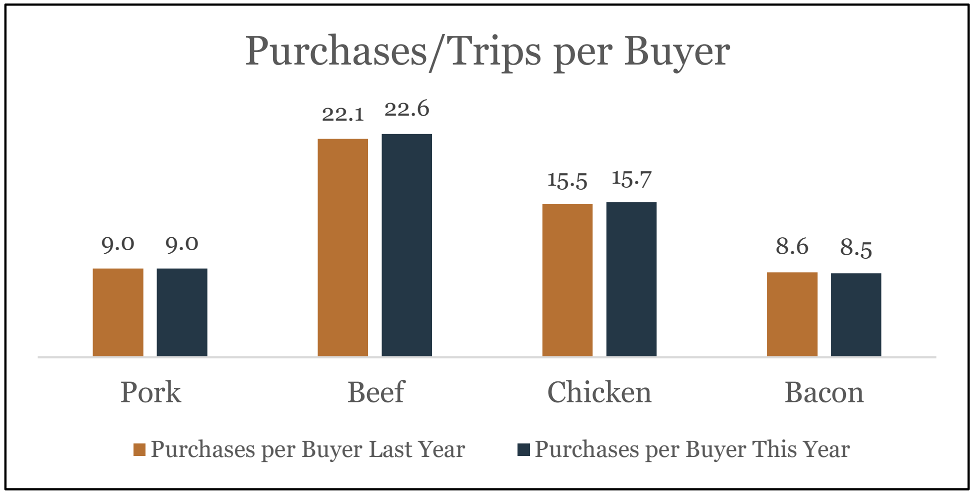
Source: Circana/IRI – Total US MULO+ Ending 7-12-2026

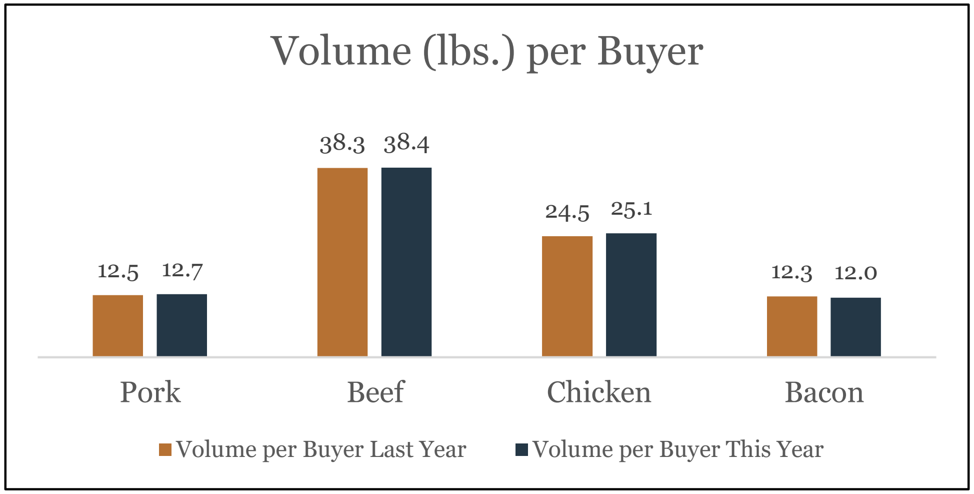
Shopper Patterns – Meat Categories

52 Weeks

- All proteins shown have lost households vs. prior year, aside from Chicken (flat)
- However, amounts being purchased and frequency of purchases are consistent, or up, for all proteins shown here, aside from bacon







Source: Circana/IRI

Shopper and Performance Topline Insights Across Food and Beverage

Circana 5/2026

Macroeconomic events are impacting consumer spend

High prices and the labor market remain key pressure points reported by consumers

Headwinds

Income Strain
- Compounded inflation outpaces wages
- High debt with credit card and student loan balances rising and higher delinquency rates
- Increasing gas prices
- SNAP changes
- ACA subsidy changes

Tightening Labor Market
- Unemployment stable; job growth slowing
- Slowing wage growth, even more so for low earners

Uncertainty Remains
- Global conflicts
- Low consumer confidence

Tailwinds

Economic Relief
- 2026 tax refunds

E-Commerce Growth
- E-Commerce and social commerce grow
- AI provides personalized shopping experiences

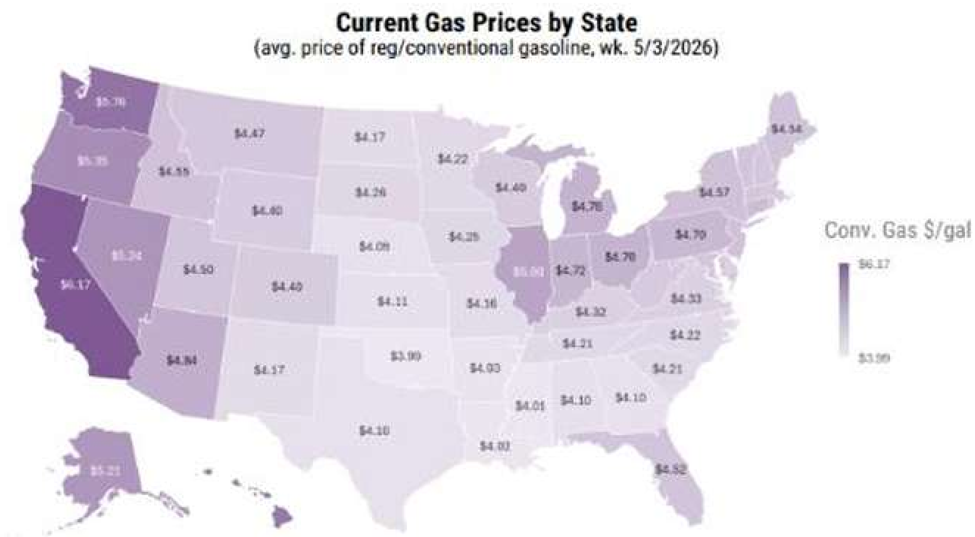
Wellness Prioritized
- Strong demand for functional foods, supplements, personal care, and better-for-you formulations
- Preventative and lifestyle-based care shows renewed focus on hobbies and experiences
- Desire for newness and little luxuries drives innovation

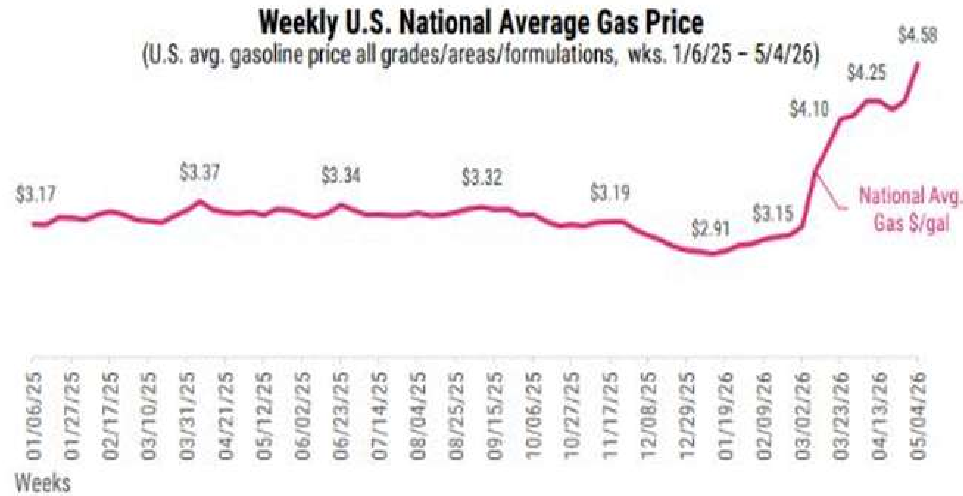
Circana.

Sources: BLS, FRED, NY Fed, U.S. Dept of Education

Pump prices fuel inflation fears

After a relatively stable 2025, national gas prices have surged, creating renewed affordability pressures for vehicle-driving households.



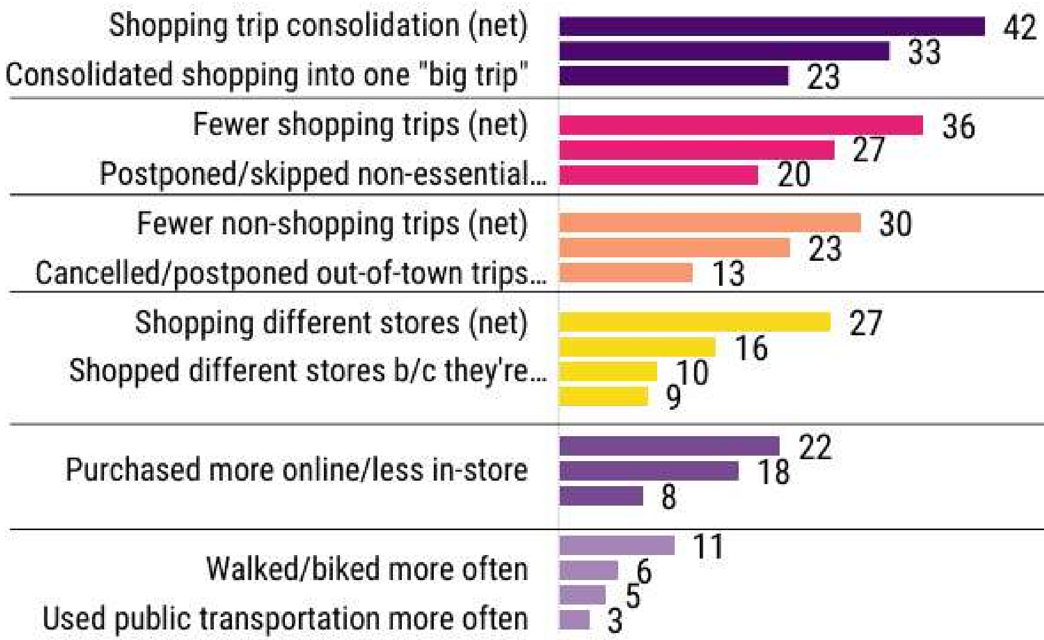


Source (gas prices by state): AAA, https://gasprices.aaa.com/state-gas-price-averages/ (5/8/2026)
Source (weekly US national avg. gas price): Energy Information Administration, https://www.eia.gov/petroleum/gasdiesel/ (5/8/26)

Gas prices drive household adjustments

Lower-income households over-index on more disruptive changes like switching stores, using delivery more often, and shifting transportation modes.

Household Adjustments/Trade-offs Due to Gas Prices (% among all HHs owning fuel vehicle)



Index by Income Tier

Lower ~25%	Middle ~50%	Upper ~25%
104	104	90
104	105	89
103	104	92
110	103	88
112	103	86
106	103	91
117	103	83
117	102	84
123	101	81
121	101	84
114	101	87
138	99	74
127	98	85
118	100	87
109	103	88
145	93	79
131	92	90
134	92	90
124	95	93
159	84	82

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Source: Circana, Receipt Panel Survey 4/17/26 – 4/28/26 (n=41K)

Q. As a result of recent gas prices, which of the following have you/your household done in the past 30 days?

Data ending May 17, 2026

U.S. Consumer Total Wallet

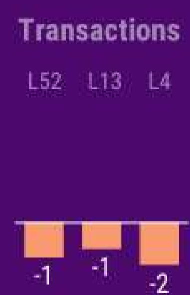
Consumers are increasingly stretched as new pressures accumulate. The personal savings rate fell to 2.6% in April, the lowest since 2022, and credit reliance grows. Confidence was at historical lows in May, gas prices remained high, and SNAP participation was down. Despite pressures, dollar growth across retail remains positive; however, volume and/or units tighten further as consumers manage spend with thoughtful choices. While overall spending remains up year over year, recent softening may signal more cautious behavior and heightened downside risk to future spending if recent pressures continue.

Retail Food & Beverage

Macro headwinds weigh on Retail F&B volumes

Restaurants[5]

Large chain restaurant transactions remain soft



Non-Food CPG

excluding Tobacco

Unit pullback deepens in Non-Food CPG

General Merchandise

General Merchandise units soften further, but spending still up

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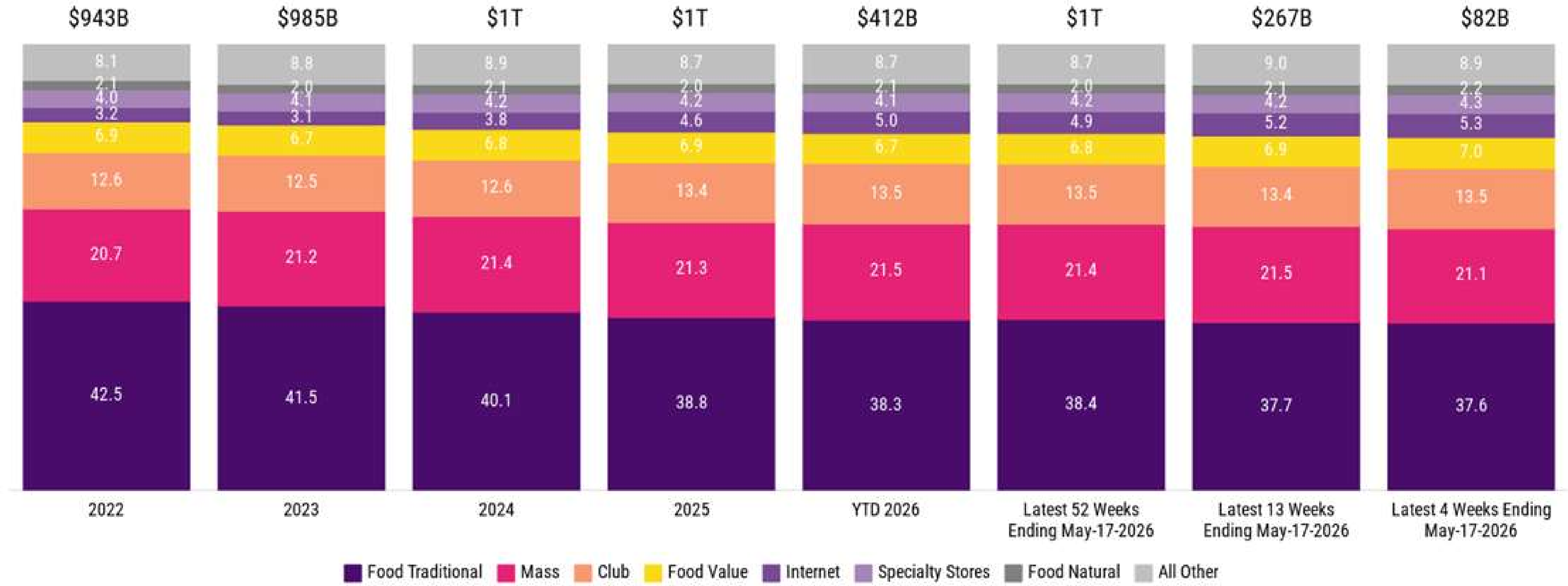
*Source: **Consumer Confidence:** University of Michigan Survey of Consumers, **SNAP:** USDA February 2026, **CPG & Gen Merch**: Circana, LLC POS data ending May 17, 2026 (May 16 for General Merchandise), **Foodservice:** Circana, LLC CREST Performance Alerts (Large Chain Restaurants Only) Circana, LLC, Executive CPG & Foodservice Advisory.*

Channel shifts reflect changing shopper preferences across Total Edible, in the latest 4wks we see a shift from Food Traditional & Mass to Club & Value

Total Edible Annual Dollar Share by Channel



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Source: OmniConsumer Integrated Fresh CY 2021-2025, YTD 2026, L52W, L13W, L4W data ending 5/17/2026, All Outlets.

Trip missions are shifting share across retail tiers as well.

Shoppers are increasingly gravitating toward both Premium and Value retailers, applying different cost-management strategies based on their needs.

The products they prioritize are playing a larger role in determining where they shop, driving share gains for retailers that deliver either value through low prices and deals or a differentiated experience and assortment.

Store choice is becoming more fluid and frequent, with 46% of shoppers changing their primary grocery store in the past 12-24 months and 68% shopping at 2-3 retailers per week.

Premium Retailers[7]

(Premium price & focus on store perimeter)

Total Store $ Sales Growth Rate

+7.7% vs YAG

Share of Wallet

19.2% +0.4 pts vs YAG

Conventional Retailers

(Hi/Mid- price & large assortments)

Total Store $ Sales Growth Rate

+2.3% vs YAG

Share of Wallet

55.4% -1.7 pts vs YAG

Value Retailers

(EDLP/ low price & prioritize convenience)

Total Store $ Sales Growth Rate

+11.6% vs YAG

Share of Wallet

24.8% +1.4 pts vs YAG

Ethnic Retailers

(Mid/Low/EDLP prices & unique assortments)

Total Store $ Sales Growth Rate

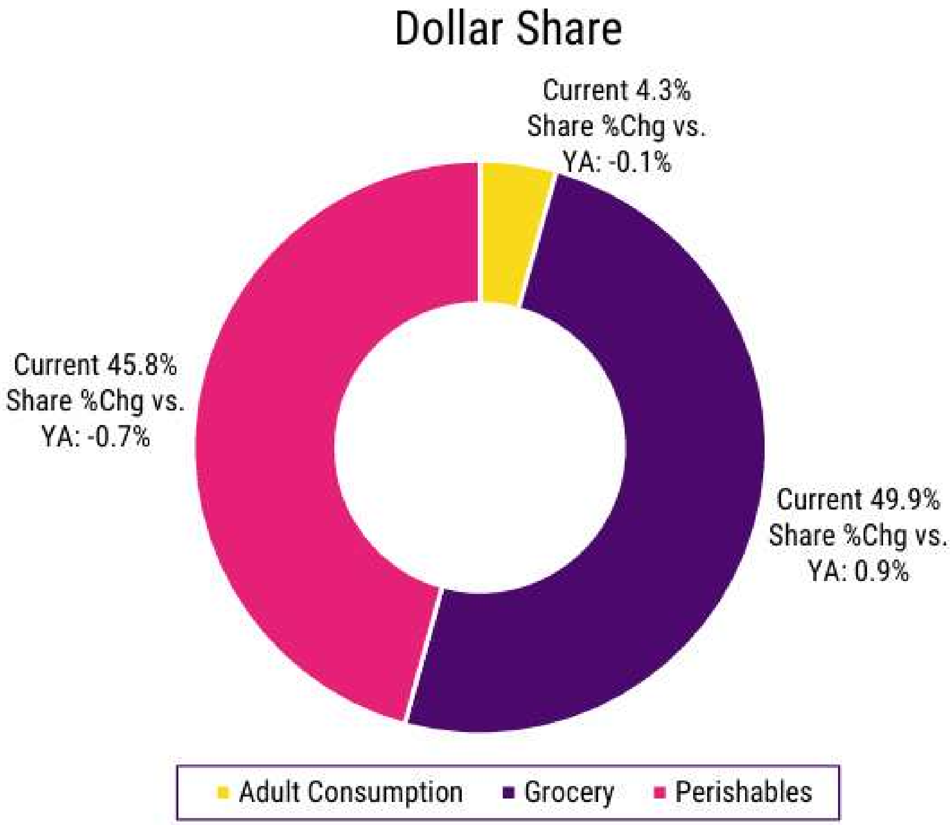
+3.9% vs YAG

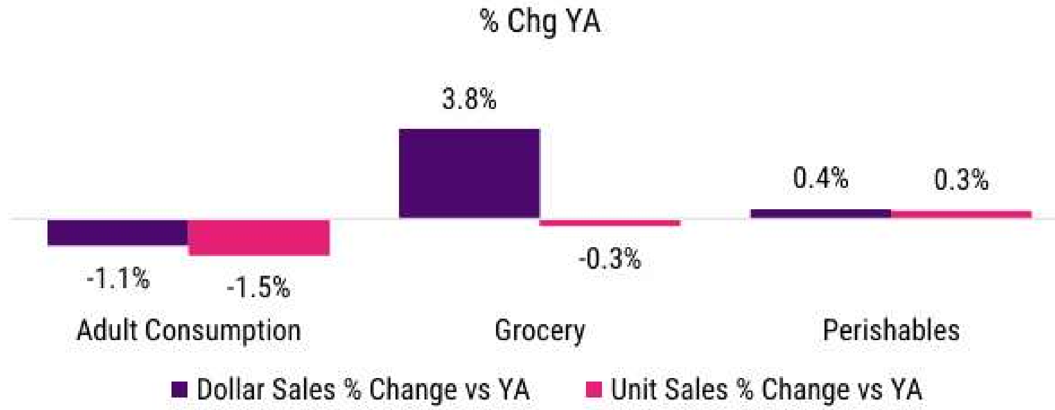
Share of Wallet

0.7% -0.01 pts vs YAG

Sources: 1: U.S. Bureau of Economic Analysis (BEA): Personal Income and Outlays March 2026, 2: U.S Bureau of Labor Statistics (BLS) Consumer Price Index April 2026 Results, 3: U.S Bureau of Labor Statistics (BLS) Current Employment Statiscits (CES) April 2026, 4: U.S Bureau of Labor Statistics (BLS) Real Earnings Report April 2026, 5: US Federal Reserve Bank of Minneapolis, "Have U.S. consumers gone K-shaped?" March 2026, 6: NIQ, BASES Quick Question Omnibus Survey, n=2,007, May 2026; 7: NielsenIQ Panel On Demand Homescan | US HS - NDH Syndicated UPC+TSV Full View - 444 3yr | Entire Dataset | Latest 52 Wks - w/e 03/21/26 Dollar $ change vs YA and Dollar Share by Retail Segments

Perishables decreased its YTD share of Total Food & Beverage (Edible) as prices are roughly flat, while Grocery gained due to sharp increases in price





Source: Circana Integrated Fresh, Total US MULO+, Calendar Year to date 2026 Data Ending 05/31/2026

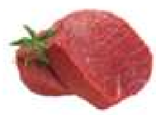
Units are shown versus volume as not all departments have the same equivalization across the store.

Fresh Foods Top 15 Categories by Absolute Dollar Change

Chicken, beef and deli entrees continue to be fresh's primary growth engines, delivering the largest absolute dollar increases year over year. Fresh tomatoes are now the 4th largest dollar growth contributor for YTD 2026 with $165M growth, up significantly from last month.

True demand increases are seen – where both dollars & unit/volume are increasing year-over-year.

- Abs $ Sales Change vs YA
- Volume* or Unit % Chg vs YA



Beef

$1.6B | 2.0%

Chicken

$327.2M | 2.0%

Deli Entrees*

$258.7M | 4.6%

Fresh Tomatoes

$165.5M | 0.9%

Fresh Finfish

$159.8M | 2.5%

Fresh Grapes

$110.6M | 3.3%

Deli Specialty Cheese

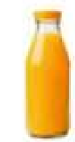
$110.4M | 3.6%

Fresh Berries

$97.5M | -1.1%

Fresh Lettuce

$97.0M | -2.9%

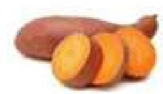


Rfg Juices/Drinks

$96.1M | -0.8%

Dinner Sausage

$94.2M | 2.0%



Fresh Sweet Potatoes/Yams

$92.7M | 26.6%

Turkey

$81.6M | -7.2%

Deli Grab & Go Lunchmeat

$77.8M | 8.2%

Pork

$66.5M | 0.2%

Source: Circana Integrated Fresh, Total US MULO+, Year to date 2026 ending 05/31/2026

Note Units used when volume is not equivalized at the dept level. Beverages, Meat, Produce and Seafood are in volume.*

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Distribution/Velocity: Year to date, Total Edible is growing in assortment and dollar velocity, while Refrigerated and Liquor experience dollar velocity declines

Avg Weekly Items per Store Selling

Avg Weekly $ per Store Selling

TOTAL EDIBLE WITH FRESH FOODS
13.2K / +2.7%
$157.9K / +3.5%

DEPT - GENERAL FOOD
6.6K / +3.1%
$43.7K / +4.1%

DEPT - BEVERAGES
2.0K / +4.3%
$21.8K / +9.2%

DEPT - MEAT
433.4 / +2.0%
$23.0K / +5.3%

DEPT - REFRIGERATED
911.7 / +1.2%
$18.9K / -6.7%

DEPT - PRODUCE
478.9 / -1.3%
$27.2K / +0.8%

DEPT - FROZEN
1.2K / +2.2%
$16.2K / +3.4%

DEPT - DELI
436.3 / +2.0%
$12.2K / +4.7%

DEPT - BAKERY
520.0 / +5.8%
$8.8K / +1.0%

DEPT - LIQUOR
475.0 / -0.7%
$11.0K / -1.0%

DEPT - FLORAL
200.5 / -0.7%
$2.8K / +1.9%

DEPT - SEAFOOD
38.3 / +0.2%
$4.3K / +2.7%

Source: Circana Integrated Fresh, Total US MULO+, Year to Date weeks ending 05/31/2026

Pricing: Year to date, pricing is up across Total Edible with the largest increases in Beverages, Meat and Seafood (>4%)

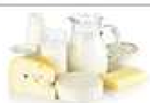
Wtd Avg Base Price per Unit | Avg Price per Unit | Avg Price per Unit, Any Merch

TOTAL EDIBLE WITH FRESH FOODS
$4.63 / +2.1%
$4.35 / +2.0%
$3.98 / +2.0%
Food & Bev Average

DEPT-GENERAL FOOD
$3.82 / +3.8%
$3.60 / +3.7%
$3.35 / +3.1%

DEPT-BEVERAGES
$4.95 / +6.0%
$4.61 / +5.8%
$4.48 / +4.3%

DEPT-MEAT
$8.14 / +4.6%
$7.53 / +4.2%
$6.41 / +10.4%



DEPT-REFRIGERATED
$3.94 / -7.5%
$3.74 / -7.4%
$3.13 / -12.1%

DEPT-PRODUCE
$3.07 / +0.8%
$2.84 / +1.2%
$2.88 / +1.2%

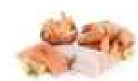
DEPT-FROZEN
$5.76 / +2.4%
$5.41 / +2.4%
$4.76 / +1.9%

DEPT-DELI
$6.51 / +1.0%
$6.26 / +0.8%
$5.36 / -0.6%

DEPT-BAKERY
$4.15 / +3.0%
$3.96 / +3.0%
$3.57 / +0.6%

DEPT-LIQUOR
$13.01 / +0.5%
$12.61 / +0.4%
$13.56 / +0.9%

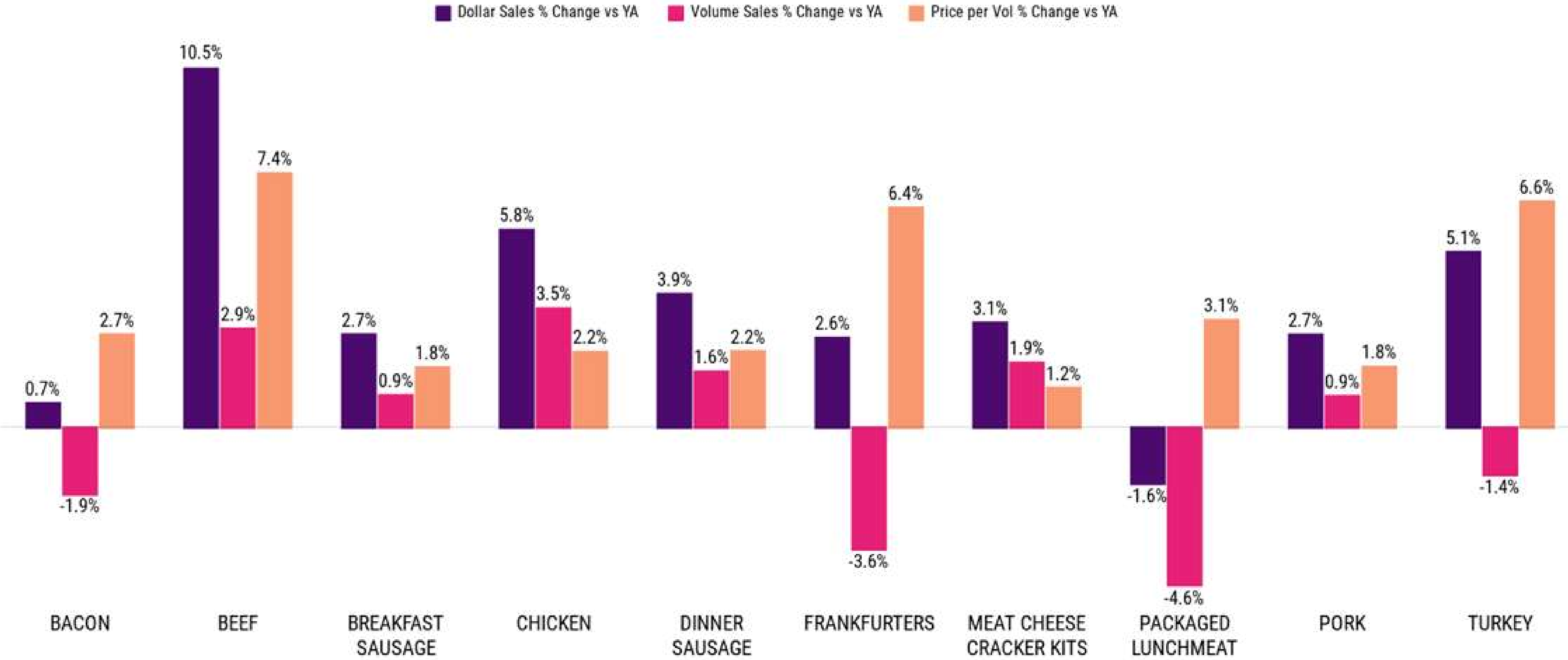
DEPT-FLORAL
$11.38 / +3.2%
$10.84 / +3.2%
$11.54 / +7.6%



DEPT-SEAFOOD
$11.39 / +3.9%
$10.74 / +4.1%
$8.75 / +7.2%

Source: Circana Integrated Fresh, Total US MULO+, Year to Date weeks ending 05/31/2026

Meat Top Category Sales: Strong growth seen across the top categories in meat, volume struggles in bacon, frankfurters, packaged lunchmeat & turkey



Circana.

Source: Circana Integrated Fresh, Total US MULO+, Latest 52 Weeks Ending 05/17/2026
Top 10 highest selling categories in department shown listed in highest selling on the left

Grocer Strategies

McKinsey & Company

Promotions are being rebuilt as a targeted, data-driven system rather than a series of events

While grocers report 35% of promotions today are fully personalized, they expect that number to jump to 55% in two to three years.

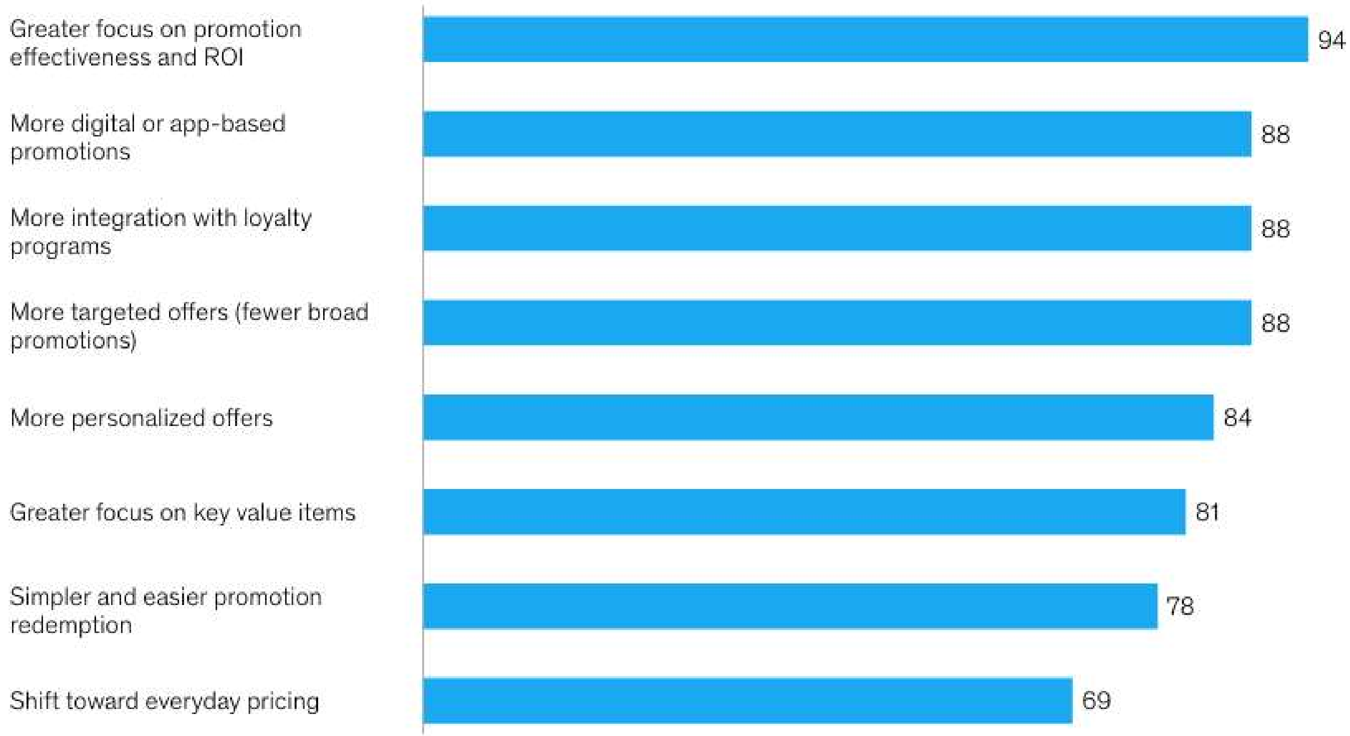
This marks a significant shift toward more digital, loyalty-enabled, and targeted promotions, with greater emphasis on ROI, personalization, and integration with loyalty programs.

It also means traditional, broad-based promotional calendars will become a more continuous, data-driven model of value delivery.

The implication is that promotions are no longer a stand-alone tactic but part of a system designed to deliver targeted value with greater precision and economic discipline.

Grocers are shifting toward digital, loyalty-enabled, and ROI-driven promotion.

Promotional levers that grocers expect to prioritize to a moderate or great extent over the next 2–3 years,[1] % of grocers



Note: Figures may not sum, because of rounding.
[1]Question: To what extent do you expect to incorporate the following in your promotional strategy over the next 2–3 years?
Source: McKinsey Grocer Survey, Apr 2026, n = 43

McKinsey & Company

The role of private label is changing.

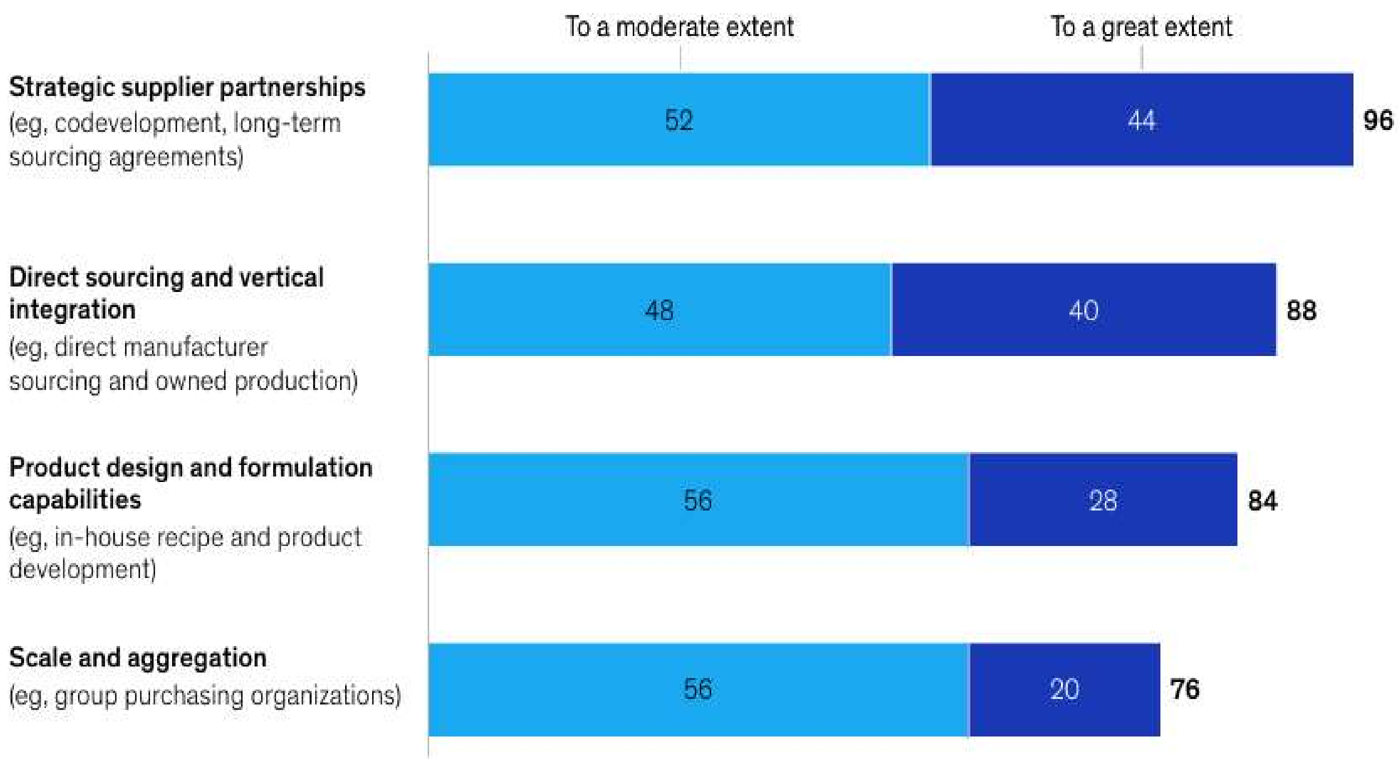
Consumers are increasingly seeking out private label products and viewing them as credible alternatives to national brands on quality, innovation, and product experience.

This has resulted in retailers investing more heavily across product, portfolio, sourcing, and innovation capabilities, creating a reinforcing cycle that continues to strengthen private label penetration and competitiveness.

In short, private label has moved from being a low-cost alternative to becoming a true differentiator increasingly shaping how grocers compete.

Grocers see supplier partnerships and direct sourcing as the leading drivers of improving private label economics.

Capabilities improving private label economics today,[1] % of grocers



[1]Question: To what extent are the following capabilities improving private label economics in your business today?
Source: McKinsey Grocer Survey, Apr 2026, n = 43

McKinsey & Company

Stores are being reshaped by the need to deliver both differentiation and execution, redefining what it takes to win.

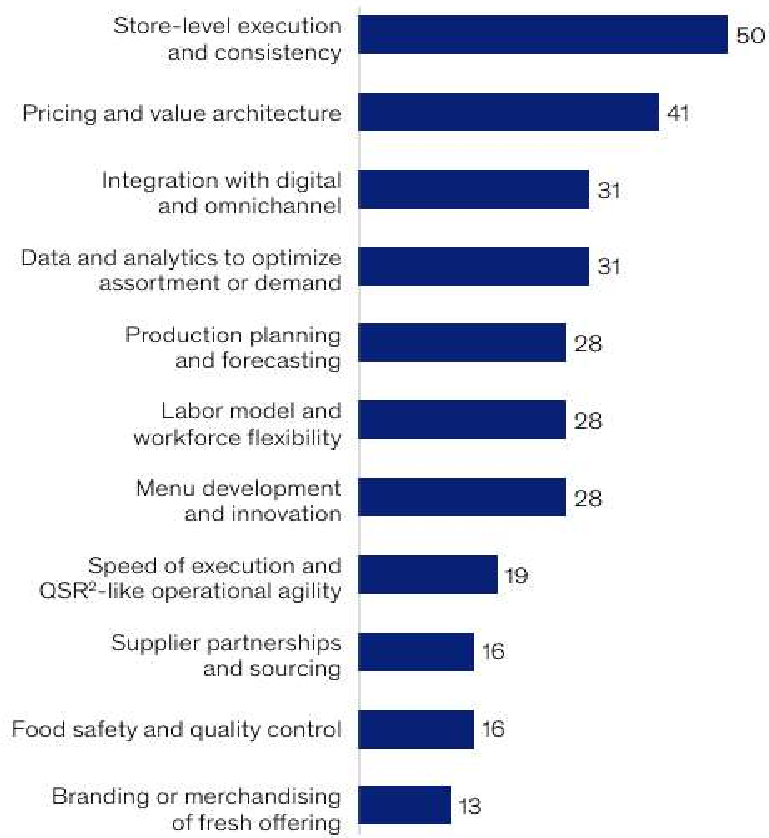
Fresh and prepared foods are becoming more important in attracting and retaining customers, while execution and consistency are becoming hurdles to delivering that experience at scale.

The challenge for grocers is not choosing between the two but delivering both simultaneously.

That's why improving execution matters more than radical reinvention: Retailers able to deliver a reliable, consistent, and compelling fresh offering are likely to be better positioned to compete

Winning in fresh foods requires grocers to improve execution and value in the face of cost and labor constraints.

Capabilities required to build a differentiated fresh and prepared offering,[1] % of grocers ranking in top 3



Barriers to scaling fresh and prepared quality offering[3]

88%
of grocers cite cost pressures (eg, labor, shrinkage, sourcing)

78%
of grocers cite labor availability and skill levels

69%
of grocers cite supply chain complexity (eg, perishability)

[1]Question: Which capabilities will be most critical to building a differentiated fresh and prepared offering over the next 2–3 years?
[2]QSR stands for "quick-service restaurant."
[3]Question: To what extent are the following factors limiting your ability to scale fresh and prepared quality consistently today?
Source: McKinsey Grocer Survey, Apr 2026, n = 43

Supplier relationships are moving from trade negotiations to integrated commercial partnerships.

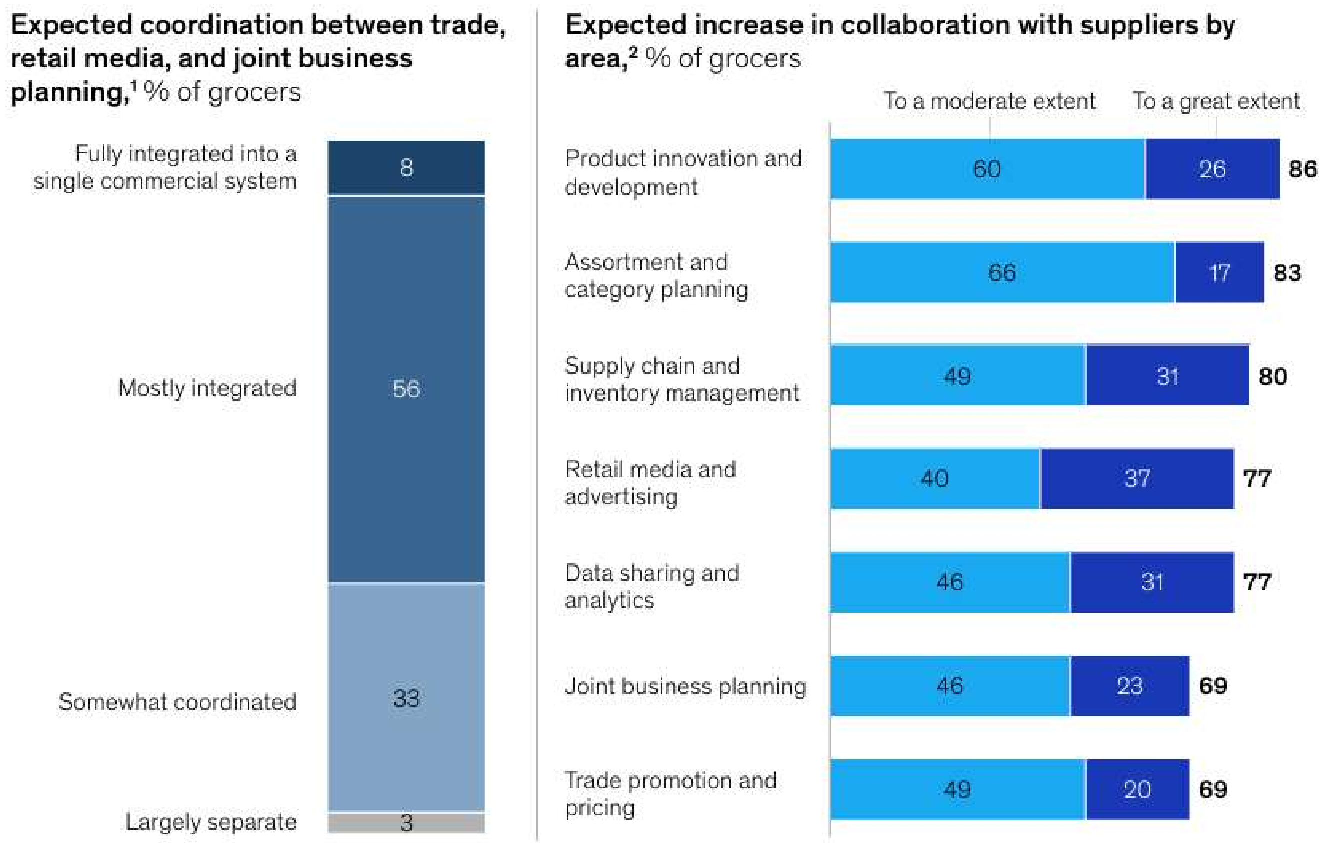
Retail media is changing how grocers work with suppliers. Grocers expect greater coordination across trade funding, retail media, and joint business planning while also expecting increased supplier collaboration in product innovation, supply chain, assortment planning, data sharing, trade promotion, and pricing.

The traditional retailer–supplier relationship was anchored in negotiations over price, promotions, shelf placement, and trade dollars; retail media adds shared investment in demand generation, data, and measurable growth.

The best relationships will increasingly connect media plans with category strategy, innovation pipelines, promotional planning, and customer insights. It’s a different commercial model that gives grocers a new way to capture value from suppliers.

But it requires them to show up differently, as suppliers expect retail media, trade, merchandising, and category teams to operate as one system rather than as separate asks on the same budget

Supplier relationships are expanding beyond merchandising into broader collaboration, particularly in innovation and assortment.



Note: Figures may not sum, because of rounding.
[1]Question: How do you expect coordination between trade funding, retail media, and joint business planning to evolve over the next 2–3 years?
[2]Question: To what extent do you expect to increase collaboration with suppliers in the following areas over the next 2–3 years?
Source: McKinsey Grocer Survey, Apr 2026, n = 43

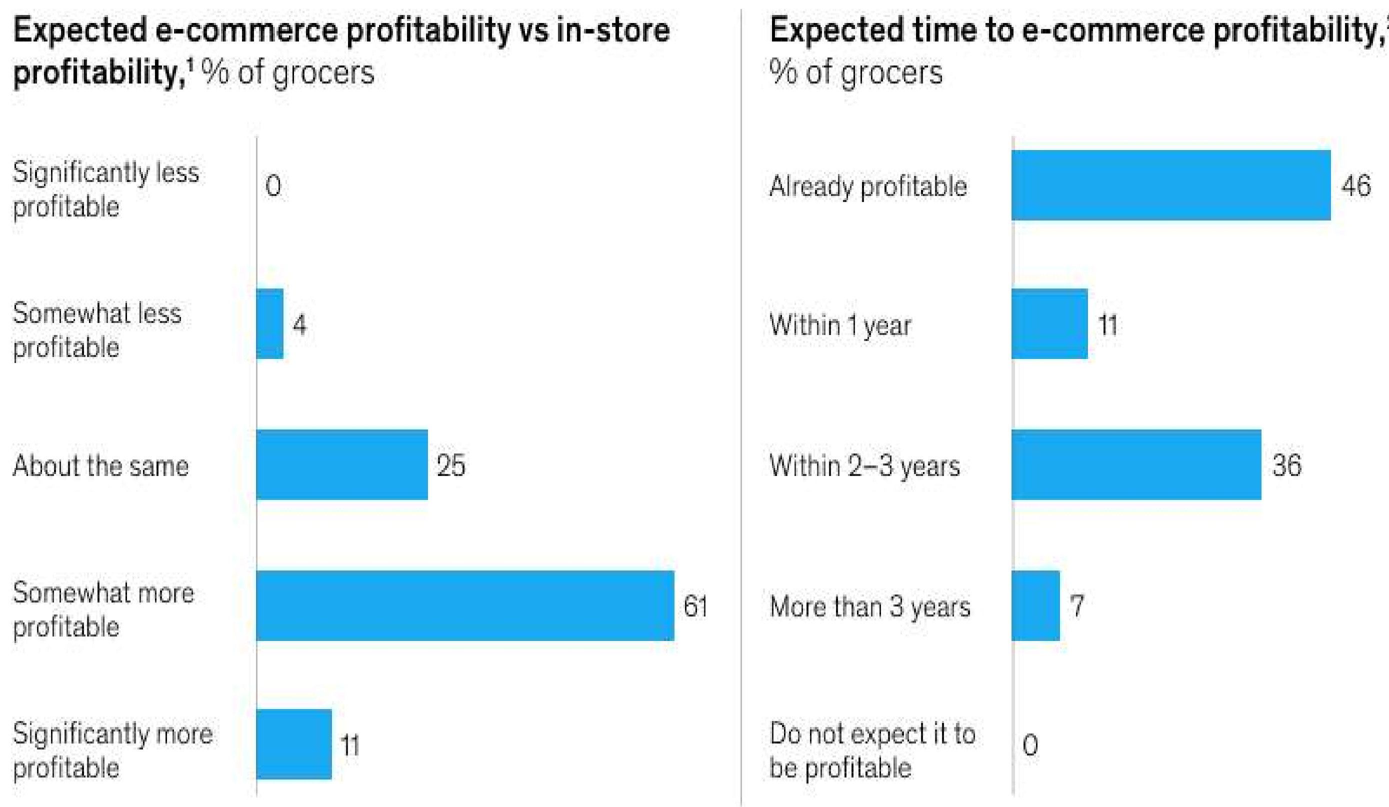
E-commerce growth is now defined by the balance between demand and economics, shifts that point to a redefinition of online sales in grocery.

Delivery is becoming the dominant driver of demand, while profitability is becoming a central constraint. While the long-term trajectory remains positive, the path forward is more complex.

Grocers will need to balance customer expectations for convenience with the operational and economic realities of fulfillment.

In this environment, advantage will depend on the ability to scale delivery while maintaining discipline on cost and operations

Nearly three-quarters of grocers expect e-commerce to exceed in-store profitability within the next few years.



[1]Question: How do you expect the profitability of your e-commerce business to compare to your in-store business over the next 2–3 years?
[2]Question: When do you expect your e-commerce business to reach profitability (if not already profitable)?
Source: McKinsey Grocer Survey, Apr 2026, n = 43

Wellness is becoming a defining driver of grocery demand.

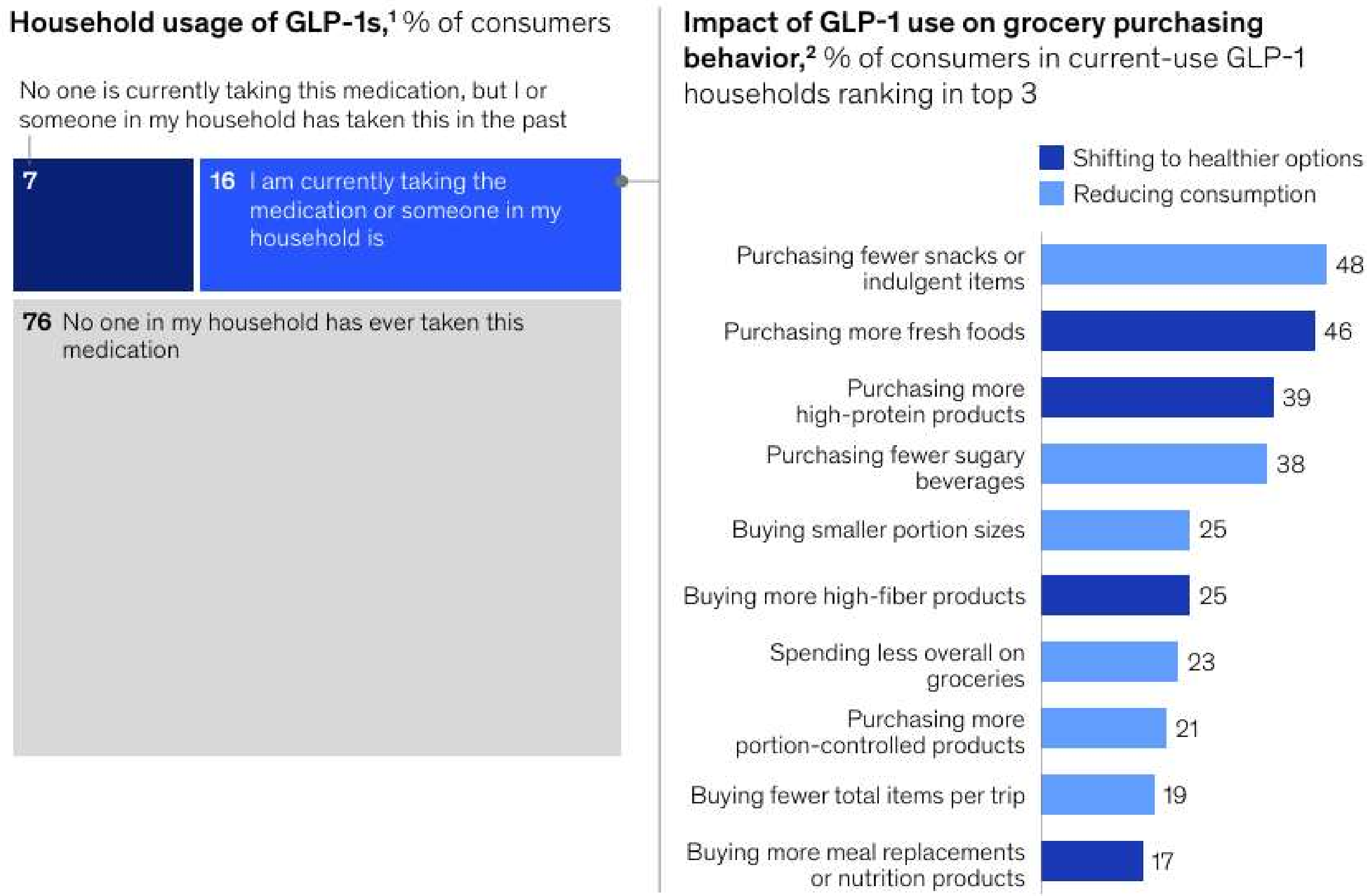
Consumer preferences are becoming more specific, baskets are adjusting accordingly, and expectations are expanding beyond products into services and guidance.

Grocers are actively responding to these shifts by reshaping assortment, reallocating shelf space, and building more integrated wellness capabilities.

Wellness has moved beyond being a niche trend to become a force that is actively shaping demand and redefining how grocers compete.

As these dynamics continue to evolve, the pace of change is likely to accelerate, increasing the importance of how effectively grocers translate wellness into both the basket and the broader customer experience

Use of GLP-1 drugs is shifting grocery baskets away from indulgence and toward fresh and high-protein options.



Note: Figures do not sum to 100%, because of rounding.
[1]Question: Are you or someone in your household currently taking weight management or diabetes medication (GLP-1)?
[2]Question: How has the use of this weight management or diabetes medication (GLP-1) impacted your household's grocery purchasing? Select and rank.
Source: McKinsey Grocery Consumer Survey, Mar 2026, n = 4,989

There are multiple winning models in grocery that successfully deliver and reinforce value perception.

Five winning grocery models

Hard "no frills" discounters	Scale-driven value platforms	Inspiration and experience destinations	Innovation-led value platforms	Merchandising authority leaders
Value perception is built through relentless everyday affordability, disciplined cost control, focused assortments, and highly visible price credibility that reinforces a clear "everyday low pricing" position	Value is delivered through competitive pricing and scale-driven convenience, leveraging broad assortment, seamless e-commerce, delivery, and omnichannel access to make everyday value easy, fast, and reliable	Value is delivered through an elevated store environment and curated assortment, where premium experience and quality-forward positioning are paired with visible signals of fairness	Perceived value advantage comes from differentiated and exclusive assortments, strong private label innovation, and clear points of distinction that extend beyond price alone	Value perception is anchored in trusted category expertise, best-in-class private brands, strong regional relevance, and a thoughtful pricing architecture that balances credibility and differentiation
Examples: ALDI, Lidl	Examples: Amazon, Walmart	Examples: Publix, Trader Joe's, Whole Foods Market	Examples: Costco Wholesale, Sprouts Farmers Market	Examples: Wegmans, H-E-B

McKinsey & Company

Packaging, Claims, and Consumer Expectations

Datassential

HOTSHOT REPORT

Key Stats To Know

58%

of consumers say **packaging typically affects what foods or beverages they buy at least a moderate amount**

78%

of consumers are interested in **packaging innovations that help food stay fresh longer**

77%

of consumers agree that high-quality packaging **makes them view a restaurant more positively**

60%

of consumers like when restaurants use **special or limited-time packaging** for seasons, holidays, or promotions

61%

of **protein-conscious consumers want a clear number** (e.g., "20g") displayed on the packaging for high-protein products

61%

of consumers are **concerned about the environmental impact** of food and beverage packaging

DATASSENTIAL

Taste and value dominate the path to purchase, but packaging still stakes its claim.

When choosing between two similar products, taste (64%) and value (50%) lead the field by a significant margin, and these priorities are consistent across generations. Health and wellness ranks third overall (31%), with relatively little variation by age. Convenience and packaging draw the most interest from Millennials, who are significantly more likely than Gen X or Boomers to cite it as a primary factor. Brand loyalty, meanwhile, is a notably stronger pull for Boomers than for younger shoppers, who are more likely to prioritize novelty and social mission.

How Do Consumers Decide Which Products To Purchase?

Q: Say you are choosing between two similar items or products in a grocery store. What would be most likely to make you pick one over the other?

Functional packaging features dominate at retail, though what that means shifts across generations.

Freshness-related attributes occupy the top of the retail priorities list — keeping food fresh longer (45%), clearly showing expiration dates (39%), and resealability (39%) are most valued overall. These concerns run strongest among older consumers: Boomers are significantly more likely than Gen Z and Millennials to prioritize both freshness extension and clear dating. Younger shoppers, by contrast, place comparatively more weight on visual appeal and buzzword callouts like "high protein" or "organic," suggesting packaging's expressive function matters more to the next generation of buyers.

Which Aspects Of Packaging Matter Most At Retail?

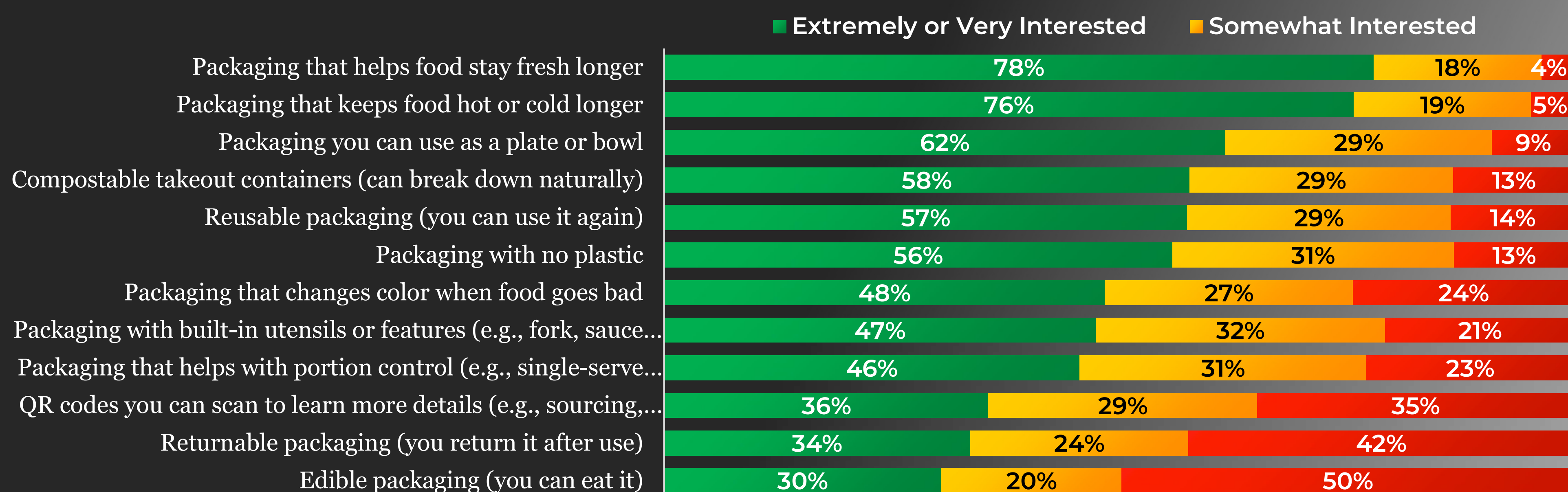
Q: When shopping for food and beverages at retail stores, which aspects of packaging matter most to you?

CONSUMER

Functional packaging innovation commands the widest enthusiasm, but Gen Z and Millennials are driving interest in the more novel formats.

Packaging that extends freshness (78%) and maintains temperature (76%) leads the innovation wishlist by a wide margin, with consistent support across generations. Younger consumers are more enthusiastic about expanded packaging functionality: Gen Z and Millennials are significantly more likely than older generations to value QR codes, edible packaging, plate-or-bowl formats, and built-in utensils. Among Boomers, interest drops sharply for many concepts, especially edible packaging (11%) and returnable models (17%). Eco-oriented innovations, including compostable containers and no-plastic packaging, draw solid mid-range interest across most demographics.

Would Consumers Be Interested In The Following Packaging Innovations?

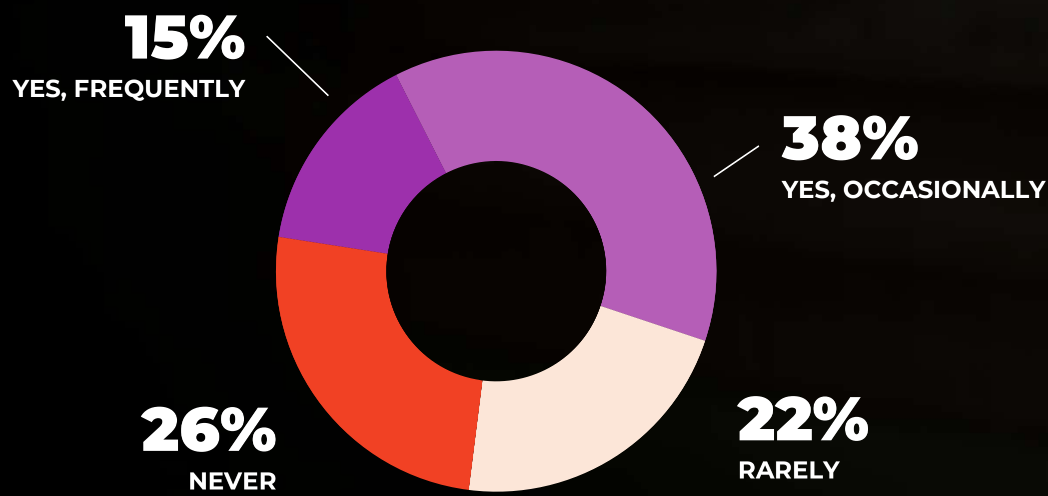


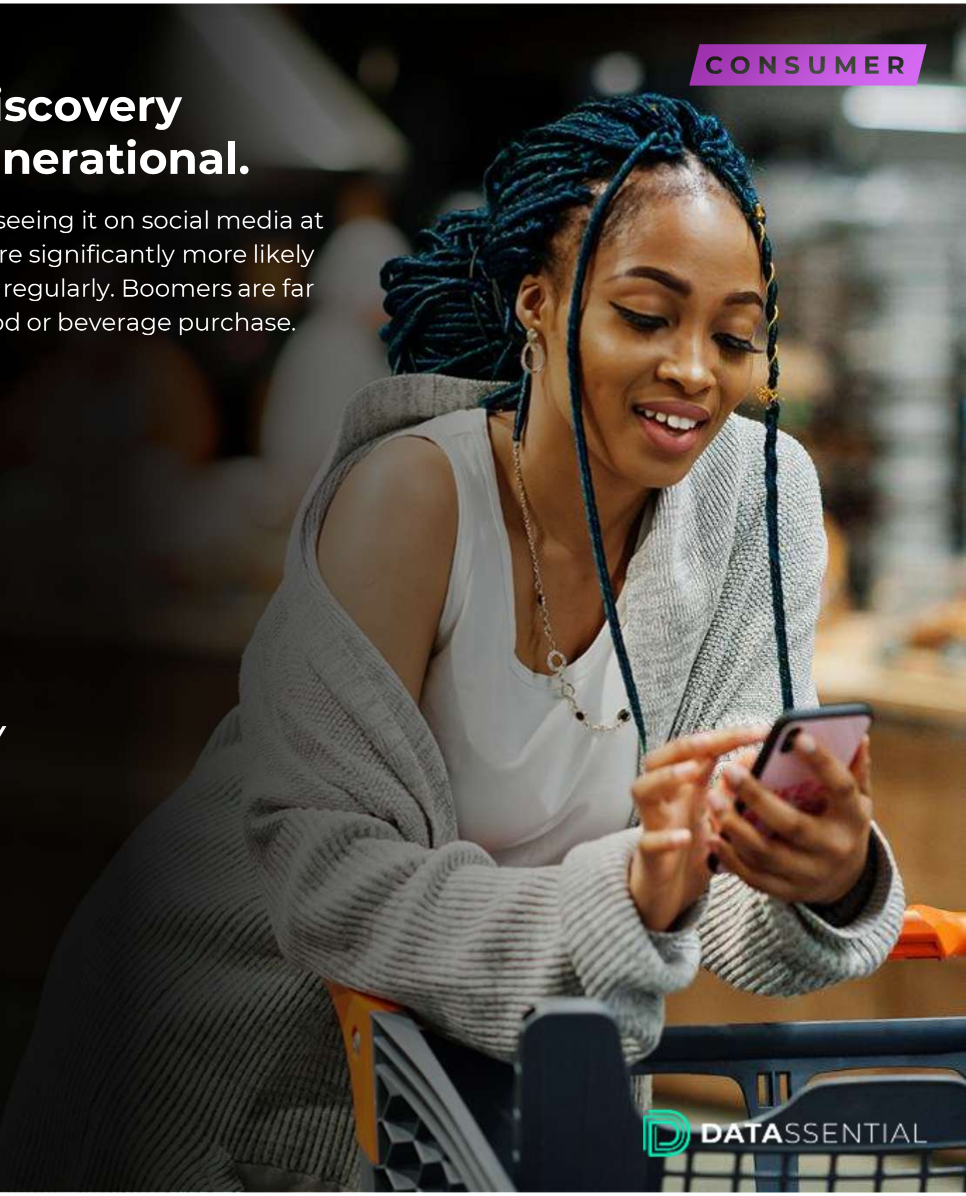
Q: How interested would you be in the following food packaging innovations?

Social media has become a meaningful F&B discovery channel, but its influence is almost entirely generational.

More than half of consumers say they have purchased a food or beverage product after seeing it on social media at least occasionally, but the impact is highly concentrated by age. Gen Z and Millennials are significantly more likely to be frequent buyers via social, with roughly a quarter of both groups saying they do so regularly. Boomers are far more resistant, with more than half saying they have never made a social-influenced food or beverage purchase.

How Often Do Consumers Purchase Foods & Beverages Because They Saw Them On Social Media?



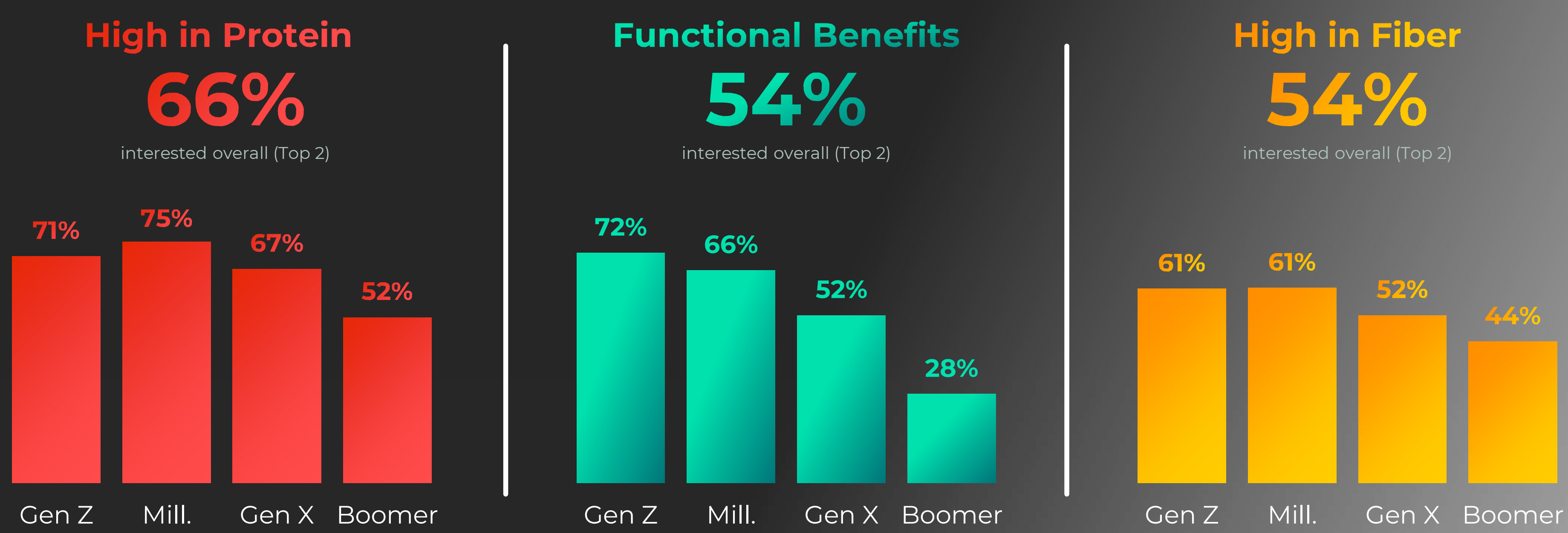


Q: Have you ever purchased a food or beverage product because you saw it on social media?

Consumers show strong interest in F&B products with healthful cues, from high-protein and high-fiber to functional products.

High-protein foods and beverages command the strongest consumer interest among the three attributes tested, though high-fiber and functional items aren't far behind. Generational differences are present across all three but are most stark when it comes to functional foods: Gen Z (72%) and Millennials (66%) are significantly more interested than Gen X (52%) and Boomers, who fall well below the total at just 28%. Foodies are consistently more engaged across all three attributes, with protein interest reaching 78% among this group.

Are Consumers Interested in Foods & Beverages With These Properties?



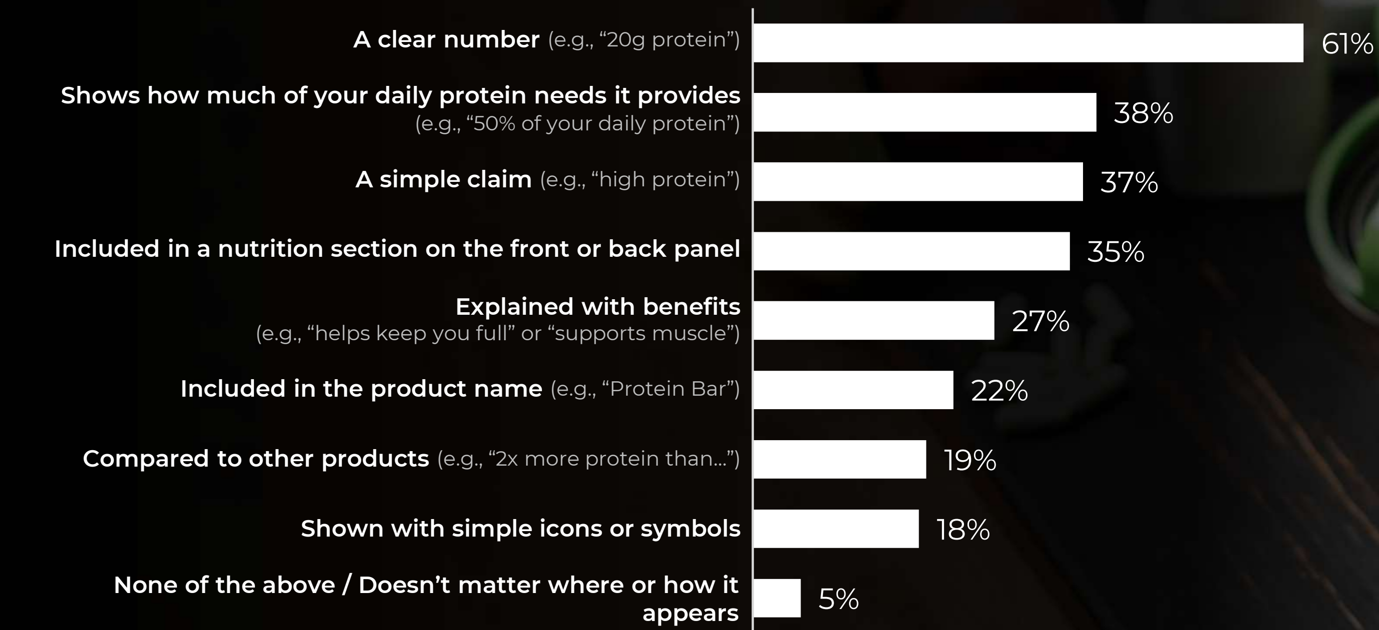
Q: How interested are you in foods or beverages, whether packaged or from restaurants, that fit each of the following nutrition and food trends?

CONSUMER

Specific numbers win the protein messaging race, but younger consumers want the story behind them, too.

Across the board, consumers most prefer protein to be expressed as a clear, specific number (61%) — a preference that runs even stronger among Gen X and Boomers. Younger consumers, meanwhile, are more receptive to supplementary approaches: Gen Z and Millennials are significantly more likely than Boomers to want protein explained with functional benefits, embedded in the product name, or framed through comparative claims.

How Should Packaging Represent High-Protein Products?



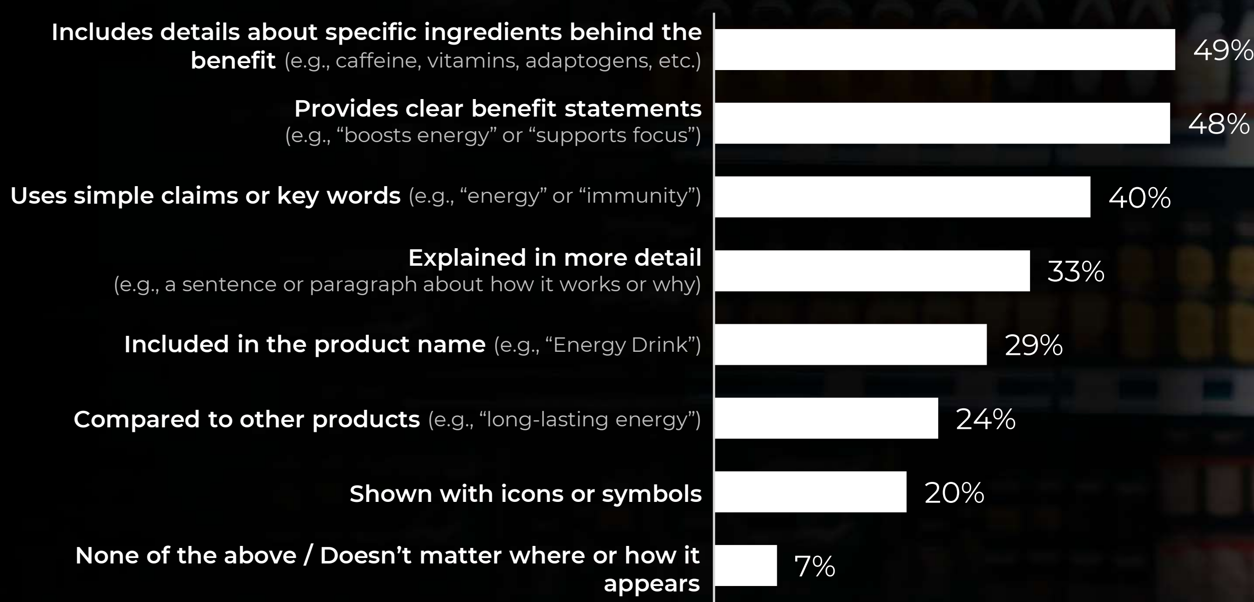
Q: When a food or beverage product includes or highlights PROTEIN, how do you prefer that information to be shown on the packaging? (among consumers who are interested in high-protein foods and beverages, n = 1,393)

DATASSENTIAL

Functional benefit claims require both clarity and credibility, though the right format depends on the audience.

For functional benefits like energy, focus, and immunity, consumers want to understand both what a product does and why it works: specific ingredient details (49%) and clear benefit statements (48%) are nearly tied at the top. Millennials and Boomers place comparatively more weight on ingredient transparency than Gen Z, who are more likely to gravitate toward simple claims, keywords, and name-embedded cues.

How Should Packaging Represent Functional Products?



Q: When a food or beverage product includes or highlights FUNCTIONAL BENEFITS (e.g., energy, focus, immunity, etc.), how do you prefer that information to be shown on the packaging? (among consumers who are interested in functional foods and beverages, n = 1,295)

Thank You

For any questions, or for further detail on any topics, please email

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