



Quarterly Retail Reports and Trends

Q3 2026

Topics



- Retail Meat Performance – Circana Data
- Inside the Meat Case Webinar – Circana, 210 Analytics, and Cryovac
- Consumer Spending – Datassential
- Food Recalls and Outbreaks - Datassential
- The Budget Meal - 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 dollar growth
- Processed Meats and Value-Added struggling with sales recently

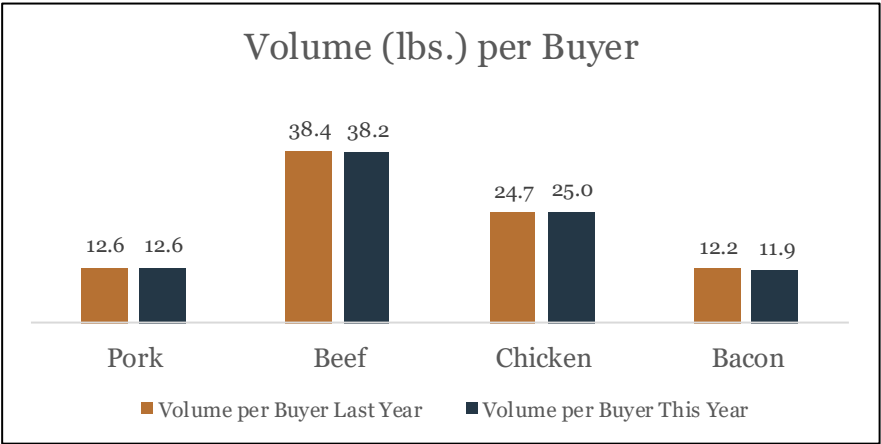
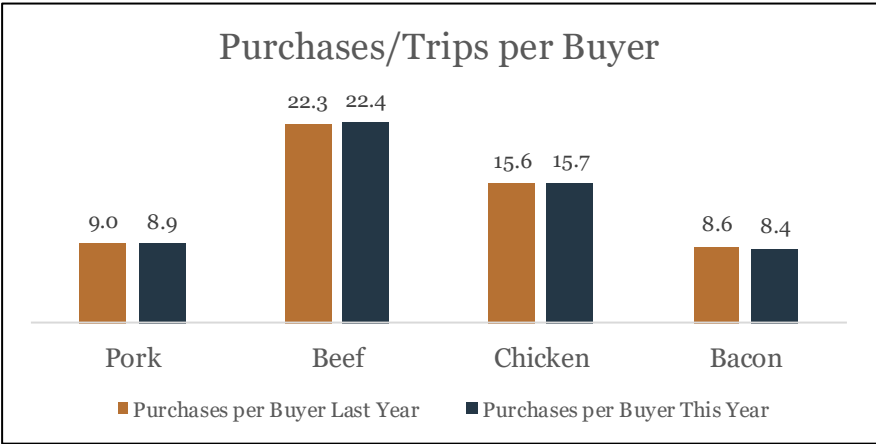
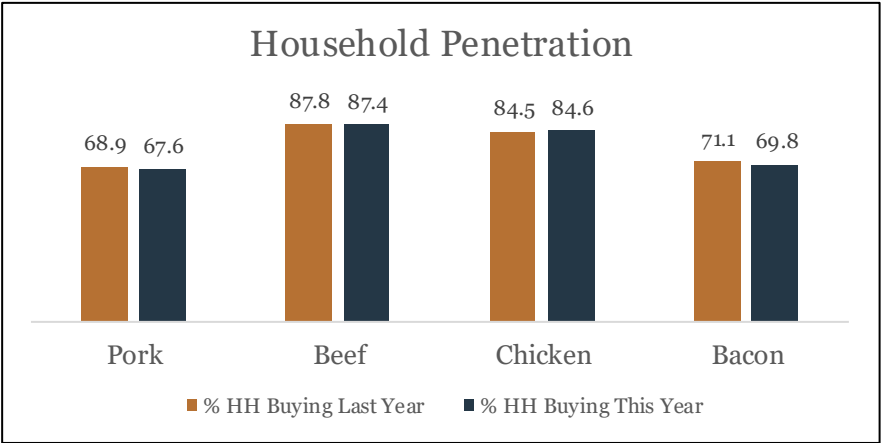
	52 Weeks				13 Weeks			
	Dollars	% Change vs. Last Year	Volume (lbs.)	% Change vs. Last Year	Dollars	% Change vs. Last Year	Volume (lbs.)	% Change vs. Last Year
Total Meat	\$114,559,198,523	4.2%	23,603,918,145	0.4%	\$28,537,081,158	0.7%	5,668,122,506	-1.1%
Fresh Meat	\$82,295,864,763	6.0%	17,307,854,757	1.5%	\$20,489,772,171	2.2%	4,152,137,909	0.0%
Pork	\$8,749,236,212	1.3%	2,703,840,030	-0.3%	\$2,229,518,209	-2.6%	688,495,996	-1.7%
Beef	\$47,367,247,886	8.4%	6,351,680,889	2.0%	\$11,911,047,307	4.3%	1,554,908,446	0.8%
Chicken	\$20,999,626,576	3.2%	6,788,322,707	2.2%	\$5,277,966,477	-0.9%	1,718,556,985	0.0%
FW Value-Added Pork Filets/Tenderloins	\$281,703,065	-0.6%	58,199,574	1.8%	\$62,449,997	-11.3%	12,624,846	-11.6%
Processed Meat	\$32,263,333,760	0.0%	6,296,063,387	-2.3%	\$8,047,308,987	-2.7%	1,515,984,597	-3.9%
Pork Bacon	\$6,434,166,357	-3.1%	1,032,220,094	-2.7%	\$1,531,135,118	-9.3%	252,843,286	-2.8%
Ground Pork Sausage Chubs/Rolls	\$1,125,684,569	2.2%	271,280,134	0.0%	\$243,178,894	0.6%	56,191,620	-2.2%

Shopper Patterns – Meat Categories

52 Weeks



- Bacon has lost the most % of households this year vs. prior year
- Retained households purchased close the same amount (lbs.) as they did last year, though again Bacon slipped a bit



Inside the Meat Case

Meat Institute and
Cryovac



Study Parameters



- Much of the following study is done by 210 Analytics (Power of Meat presenters) by physically going to stores and counting shelf space for the various meats
- This study is done every 4 years, and a summary of the key slides presented are included here

I apologize for the top corner being blocked by the presenter, I don't have the actual slides, just screenshots from the webinar

Full-service case trends

Beef continues to dominate the full-service case, with 26% of total linear feet. This is followed by chicken (much of it marinated or value added), pork and sausage.



Linear feet is a measurement of the visible size of the full-service meat counter as measured in feet across.

Each shelf/tier is counted separately



Beef
26% ↔



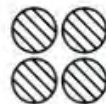
Chicken
22% ▲



Pork
18% ▲



Sausage/processed
17% ▲



Ground beef
11% ↔



Turkey
2% ▼



Heat and serve
2% ↔



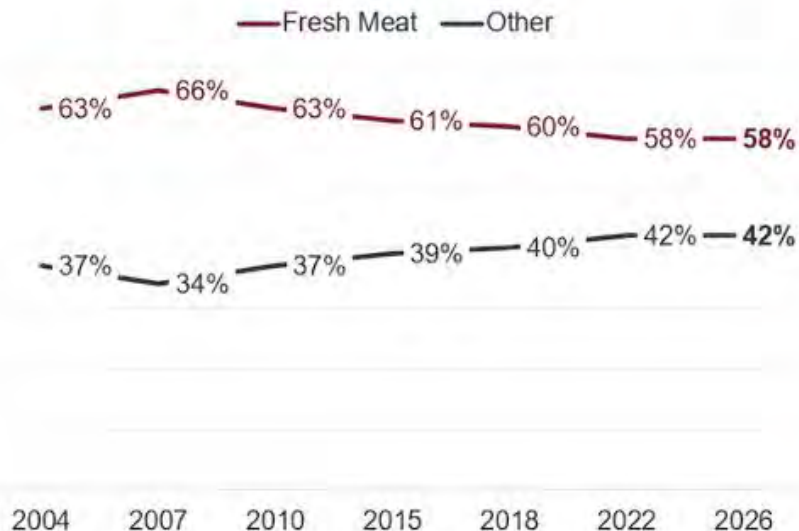
Lamb
1% ↔

Self-service meat case linear feet trends

The rise in packages resulted in the average number of packages per linear foot returning to 2018 levels. Fresh meat meal solutions are allocated additional space in deli prepared foods.



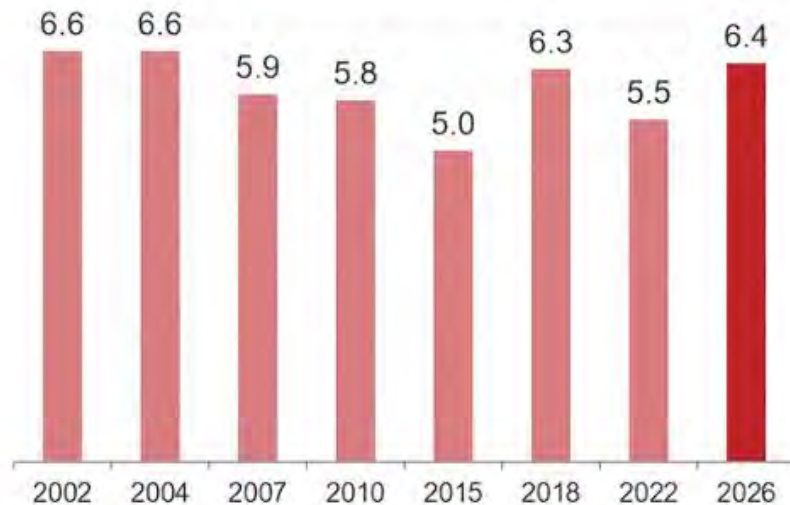
Self-service case linear foot composition share of fresh meat*



Other items include: processed, sausage, ham, seafood, meat alternatives, heat & serve, value-added, non-meat such as mashed potatoes and other.

This trendline is impacted by fresh ready-to-cook solutions in the deli

Self-service case average fresh meat packages per linear foot in the self-serve case



Linear Feet is a measurement of the visible size of the self-service meat case display as measured in feet across. Each shelf is counted separately.

Share of linear feet in the meat case by protein

Shares are impacted by protein's own package counts as well as counts of other species.

Chicken's assortment return meant decreased shares for beef and turkey.



30%

Chicken ▲



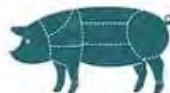
23%

Beef ▼



20% ↔

Pork

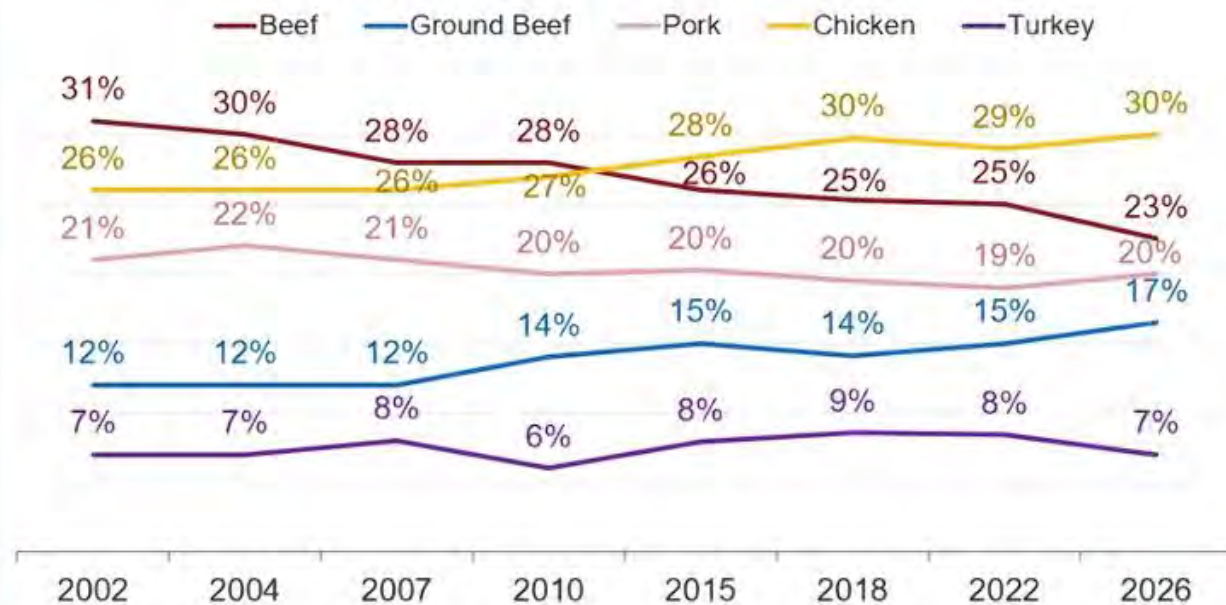


17%

Ground beef ▲



Percentage of linear feet for fresh proteins



Fresh meat SKUs built back from 2022 low

The 2022 SKU contraction appears to have been driven more by supply chain disruption than structural merchandising changes, with assortment close to returning to 2015/2018 levels.



Average number of meat SKUs per store by year



-10%

Change in average items per store between the 2018 and 2022 studies, reflecting heavy supply chain disruption in 2022

+7.4%

Change between 2022 and 2026

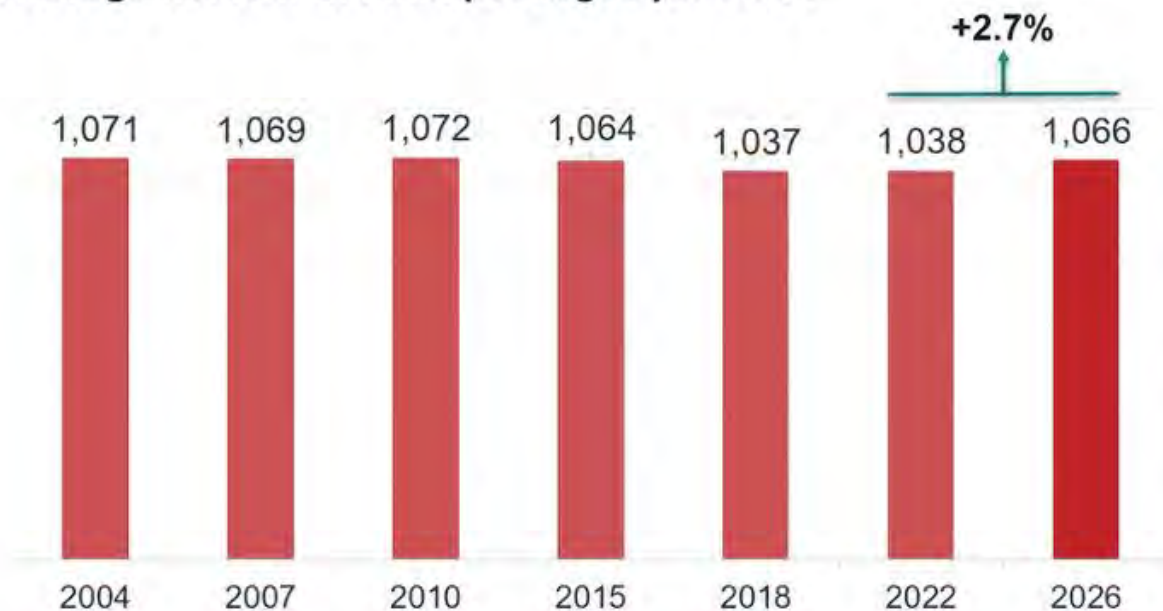
Seafood, sausage, fully-cooked and plant-based meat alternatives are excluded from the total

Package inventory also improved

The average number of packages decreased between 2015 and 2022, but rebuilt over a few years to very similar levels seen between 2004 and 2015.



Average number of meat packages per store



-2.5%

Change in average items per store between the 2015 and 2018 studies amid general SKU rationalization efforts

+2.7%

Change between 2022 and 2026

Seafood, sausage, fully-cooked and plant-based meat alternatives are excluded from the total

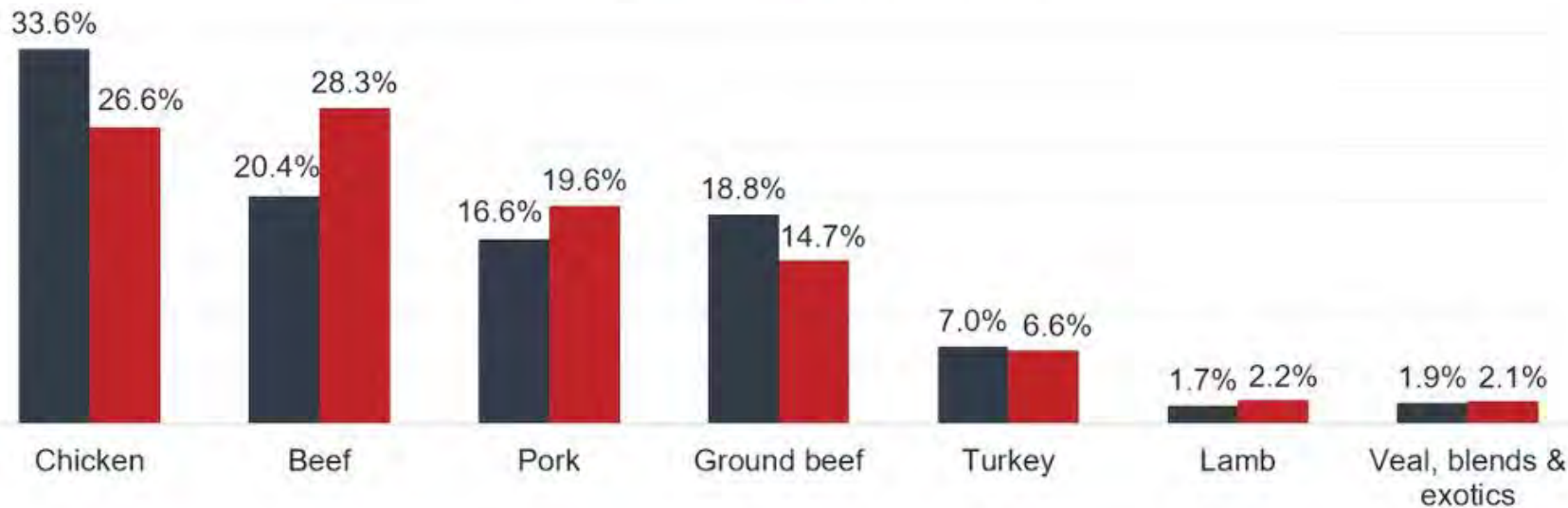
Beef rules in SKUs; chicken in packages

Chicken accounts for an average of 34% of meat/poultry packages in the store, while beef represents an average of 28.3% of SKUs, further reinforced by ground beef.



Share of packages by protein

■ Share of packages ■ Share of SKUs



Exotics includes blended items, bison, boar, duck, elk, rabbit, venison, goat, frog and Cornish hen

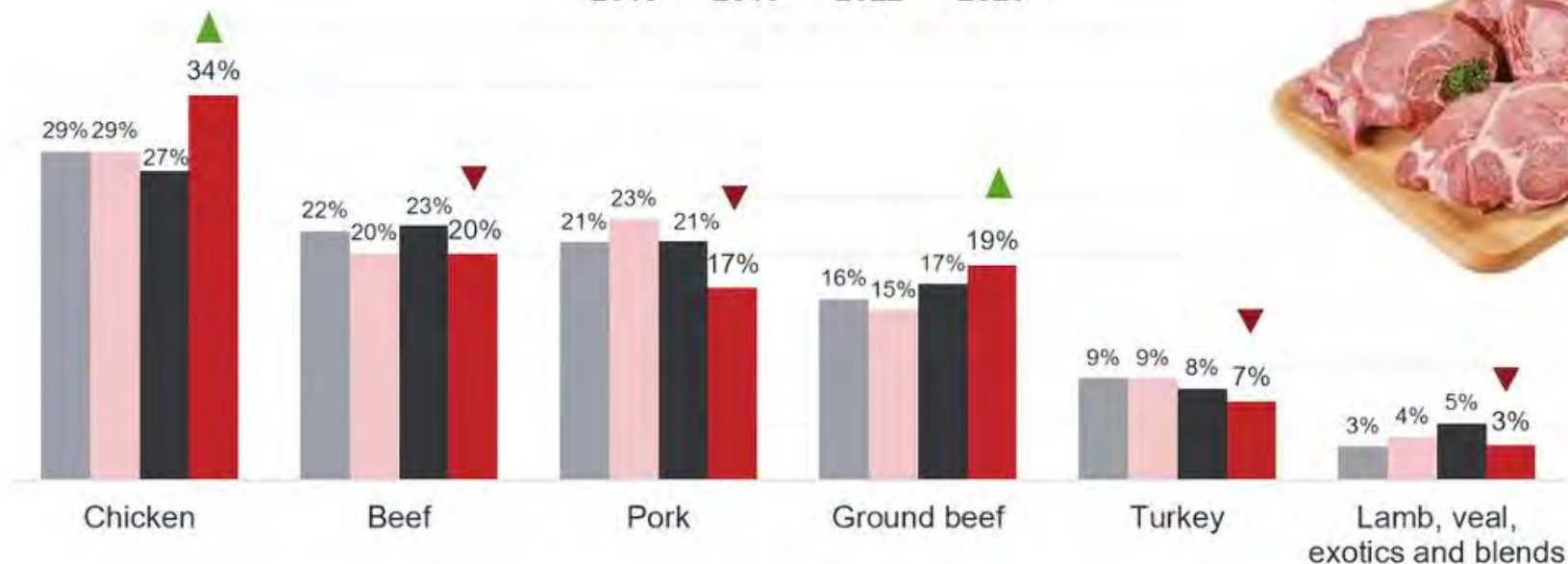
Share of packages by protein

The normalization of chicken packages (and SKUs) and reduction of beef packages, percentage point decline for beef as a share of total packages, whereas chicken rose 7 points.



Share of packages by protein

■ 2015 ■ 2018 ■ 2022 ■ 2026



Plant-based meat alternatives

Plant-based meat alternative SKUs and packages decreased substantially when compared to 2022 levels, closely mirroring sales patterns.



3

Average **SKUs** per store

7 in 2022

6 in 2021

20

Average **packages** per store

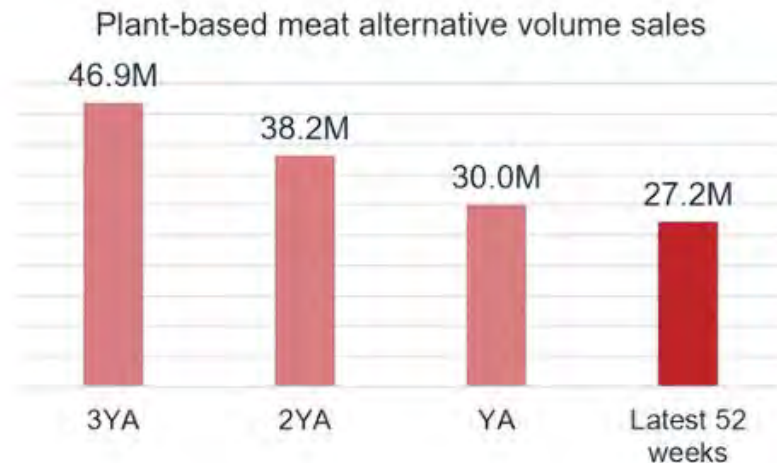
49 in 2022

39 in 2021

Sales

\$243 million | -8.7% YOY

27 million pounds | -9.3% YOY



Boneless vs. bone-in among eligible cuts

Stores carried more boneless meat and poultry packages in 2026, predominantly driven by chicken. The 2022 results were heavily impacted by the chicken supply chain challenges.



Share of eligible* packages that are boneless



Note: Not included are fully-cooked, grinds, sausage, ingredient cuts, such as tenderloins or strips, offal and other cuts that by definition are always boneless, such as cubed steak



Beef ▲

2026: 88%
2022: 87%
2018: 92%



Pork ▼

2026: 61%
2022: 64%
2018: 69%



Chicken ▲

2026: 63%
2022: 56%
2018: 61%

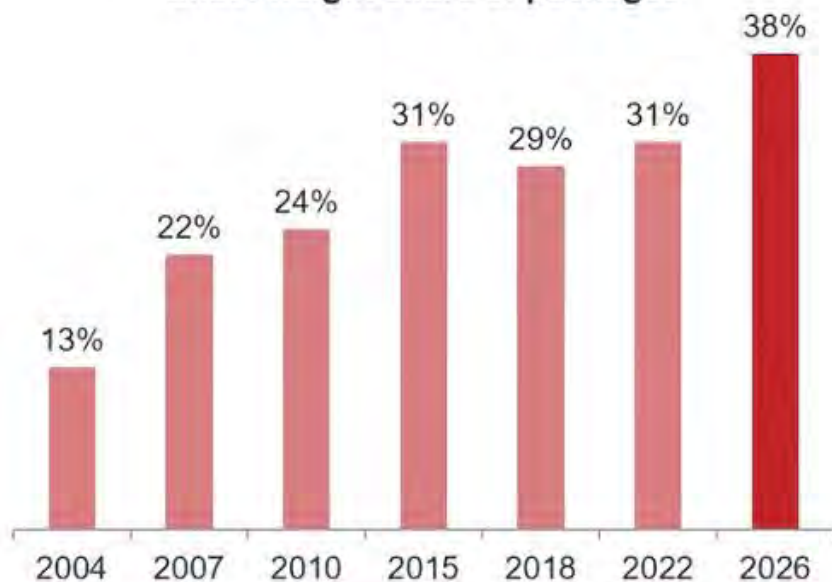
Exact-weight meat case packages

The share of exact-weight packages reached its highest level, at 38%. This is supported by growth across species as well as a greater presence of grinds.



Anne-Marie Roerink

Exact weight share of packages



Turkey ▲
2026: 91%
2022: 85%
2018: 83%



Ground beef ▲
2026: 83%
2022: 75%
2018: 74%



Pork ▲
2026: 33%
2022: 21%
2018: 26%



Lamb ▲
2026: 26%
2022: 17%
2018: 13%



Chicken ▲
2026: 17%
2022: 13%
2018: 14%



Beef ▲
2026: 15%
2022: 11%
2018: 8%

Case-ready meat and poultry packages

Case-ready continued to rise across proteins, now representing 85% of packages



85%

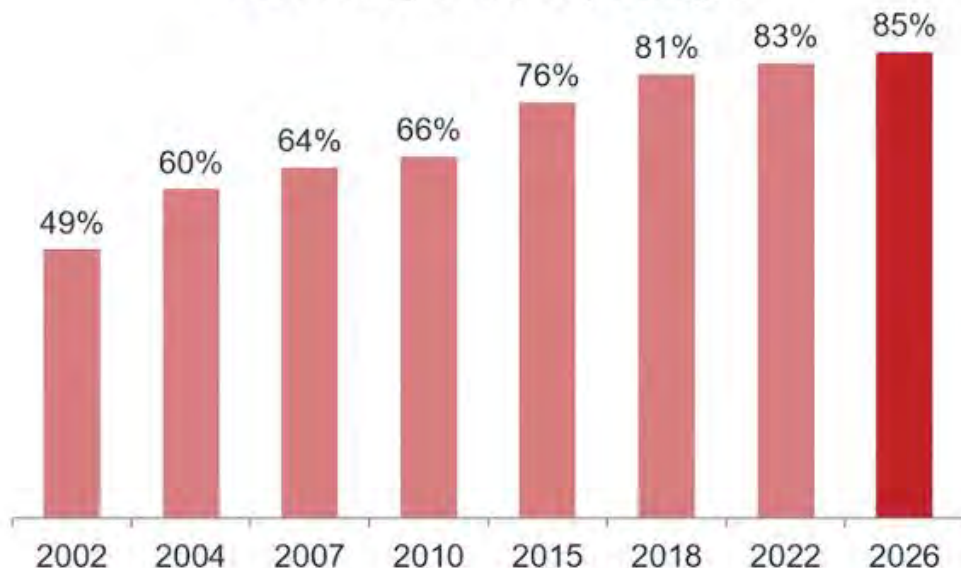
Of **packages** are case-ready

78%

Of **SKUs** are case-ready

During data collection, case-ready was determined by the presence of an establishment number on pack. Seafood, plant-based alternatives, sausage and fully-cooked are not included in the total.

Case-ready share of packages



Case-ready packages by species

Case-ready has reached a point of saturation for turkey and chicken, while the case-share for ground beef drove much of the overall increase.



Turkey ↔

2026: 99%
2022: 99%
2018: 97%



Chicken ▲

2026: 97%
2022: 96%
2018: 94%



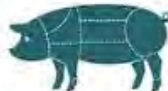
Lamb ▲

2026: 91%
2022: 86%
2018: 80%



Ground beef ▲

2026: 89%
2022: 85%
2018: 83%



Pork

2026: 78% ▲
2022: 77%
2018: 74%



Whole muscle beef cuts ↔

2026: 61%
2022: 61%
2018: 55%



Packaging types in the meat case

Vacuum packaging extended its lead over PVC wrap and poultry film, now accounting for 35% of packages and 34% of SKUs.



All fresh proteins in the meat case



Vacuum

35%

Of meat case
packages

34% of SKUs



PVC Wrap

23%

Of meat case
packages

33% of SKUs



Poultry film (SES/BDF)

20%

Of meat case
packages

15% of SKUs



Tray lid + MAP

14%

Of meat case
packages

13% of SKUs



Chub

7%

Of meat case
packages

3% of SKUs

Not included: seafood, sausage, fully-cooked and meat alternatives
Other not shown, at 1%, which includes cups, aluminum trays, clam shells,
ovenable pouches, etc.

Packaging types by protein

Vacuum's share of packages rose for all species except turkey.



2026 and
comparison
to 2022

							
		Beef	Ground beef	Pork	Chicken	Turkey	Lamb
Vacuum		43% ▲	30% ▲	56% ▲	25% ▲	9% ▼	76% ▲
PVC wrap		51% ▼	26% ▼	37% ▼	4% ▼	2% ↔	11% ↔
Poultry film (SES/BDF)		--	--	--	55% ▼	25% ▲	--
Tray lid +MAP		6% ↔	18% ▼	7% ↔	14% ▲	46% ▼	12% ▼
Chub		--	26% ↔	<1%	--	19% ▲	--

Not included: seafood, sausage, fully-cooked and plant-based meat alternatives.

Other includes cups, aluminum trays, clam shells, ovenable pouches, etc.

© Sealed Air | 38

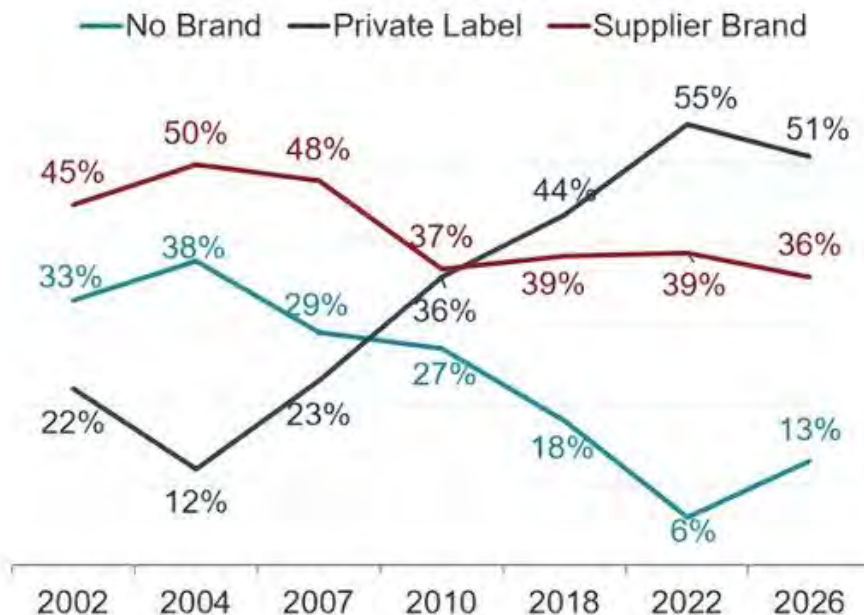
CRYOVAC

Brand usage in the meat case

Private brands maintained the highest share of packages, at 51%, while the presence of supplier brands was stable at 36%. Shares vary substantially by species.



Brand shares of total packages



Beef

- Private: 66%
- Supplier: 20%
- No brand: 13%



Ground beef

- Private: 63%
- Supplier: 23%
- No brand: 14%



Lamb

- Private: 69%
- Supplier: 29%
- No brand: 2%



Pork

- Private: 54%
- Supplier: 41%
- No brand: 6%



Chicken

- Private: 51%
- Supplier: 44%
- No brand: 6%



Turkey

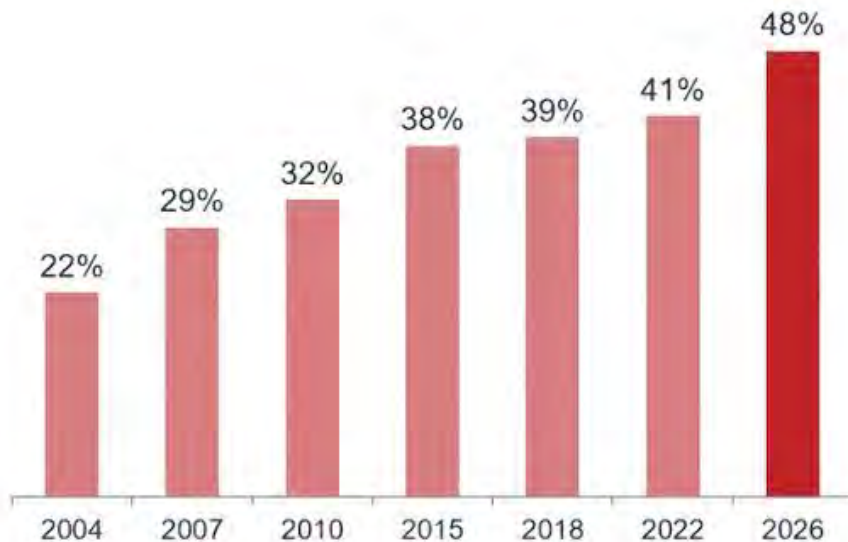
- Private: 28%
- Supplier: 71%
- No brand: 0.3%

Natural claims in the meat case

With growth in turkey, chicken, lamb and ground beef, the share of packages carrying a natural label grew substantially to reach 48% in 2026.



% of packages with a natural claim



Not included: seafood, sausage, fully cooked and plant-based meat alternatives



Turkey ▲

2026: 78%
2022: 62%
2018: 52%



Chicken ▲

2026: 61%
2022: 52%
2018: 59%



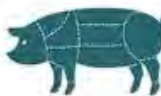
Lamb ▲

2026: 60%
2022: 46%
2018: 63%



Ground beef ▲

2026: 49%
2022: 40%
2018: 36%



Pork ↔

2026: 38%
2022: 37%
2018: 27%



Beef ↔

2026: 21%
2022: 20%
2018: 17%

Organic claims in the meat case

Despite robust sales gains (albeit of a small base), the share of packages with organic remained unchanged across species.



\$3.8B

Fresh sales with organic claims

+24.8%

\$ sales vs. YA

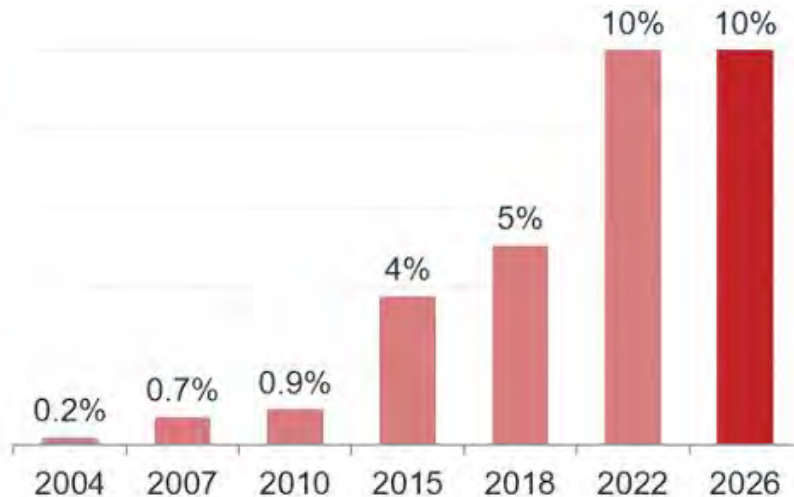
+23.0%

Lbs sales vs. YA

+21.4%

Unit sales vs. YA

% of packages with organic claims



Not included: seafood, sausage, fully cooked and plant-based meat alternatives



Chicken

2026: 18%

2022: 18%



Ground beef

2026: 15%

2022: 14%



Turkey

2026: 9%

2022: 10%



Beef

2026: 9%

2022: 8%



Pork

2026: 1%

2022: 1%

Value added meat and poultry

Value-added: marinated, seasoned, patties, meatballs, stuffed, breaded, bacon-wrapped

Value added is another area of growth for the meat case, with high shares for pork and turkey.



\$7.3B

Value-added fresh meat sales

+7.4%

\$ sales vs. YA

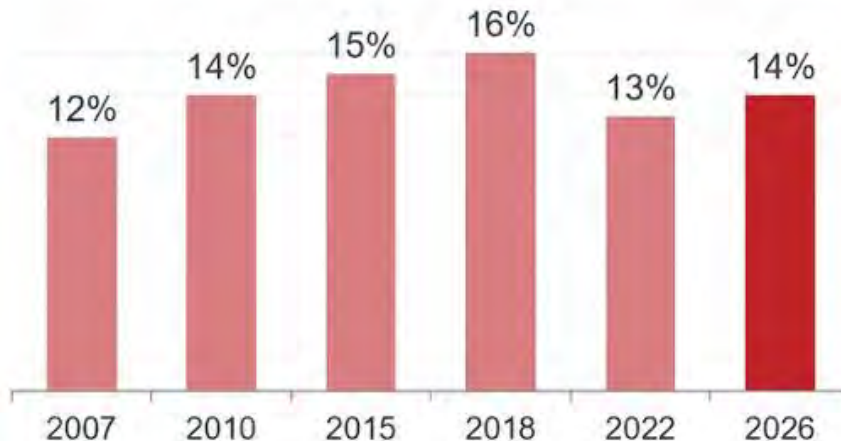
+5.1%

Lbs sales vs. YA

+4.6%

Unit sales vs. YA

% of packages with value-added meat and poultry



Not included: ready to eat, ready-to-heat meals and meal solutions, seafood and plant-based meat alternatives. Value-added ground beef is patties or seasoned.

Pork ▲
2026: 34%
2022: 25%

Turkey ▲
2026: 15%
2022: 10%

Chicken ↔
2026: 11%
2022: 9%

Beef ↔
2026: 12%
2022: 10%

Ground beef ↔
2026: 6%
2022: 8%



Anne-Marie Roerink



Pork

Performance

Holding volume and growing trips, though fewer households buying fresh pork

68.0% | -1.7%

Household penetration

\$8.8B | +2.1%

Fresh pork sales

2.7B | +0.1%

Fresh pork pound sales

What changed

Convenience plays a growing role in fresh alongside growth in sausage

78%

Case-ready share; 33% fixed weight

56%

Vacuum package share

Growth areas:

Value-added pork, thin cuts, ingredient cuts and ground pork

The opportunity

Convenience

- Value added
- Ground pork
- Ingredient cuts

Value

- Favorable pricing
- Private brand growth
- Pack size variety

Differentiation

- Animal welfare claims
- Value-added flavors

Consumer Spending

Datassential



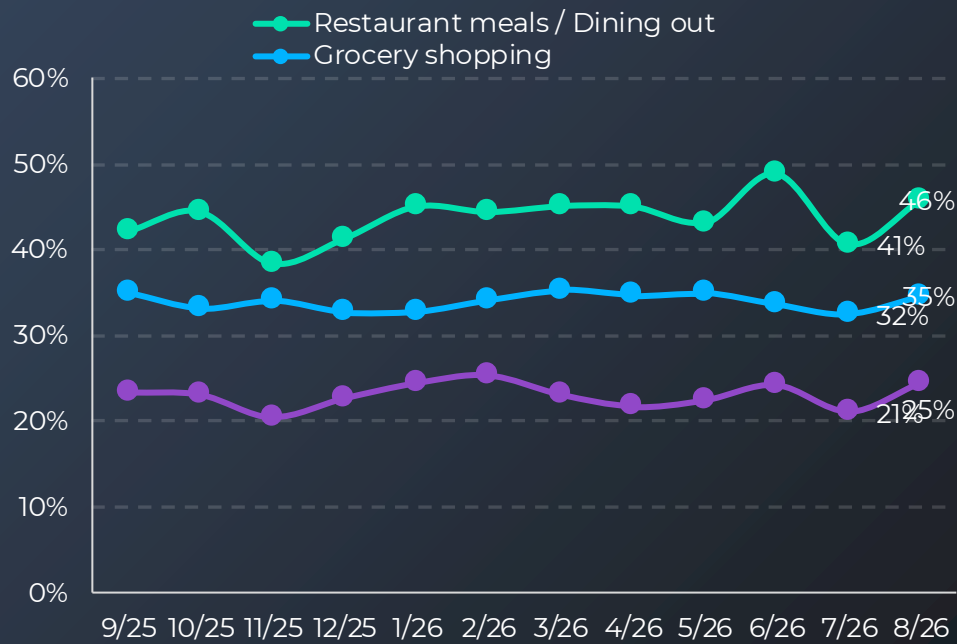
Consumer: Spending Cuts

09/26

Which Areas Of Spending Have Consumers Cut Back On Last Month?

	07/26	08/26	1-mo. change
Restaurant meals / Dining out	41%	46%	5%
Clothing, shoes, apparel	40%	44%	3%
Grocery shopping	32%	35%	2%
Travel	32%	34%	2%
Live entertainment	28%	31%	3%
Hair / Nails / Grooming	24%	28%	3%
E-commerce	21%	25%	3%
Alcoholic beverages	21%	25%	4%
Gasoline	23%	24%	0%
Housing	8%	6%	-2%
None of these	24%	21%	-3%

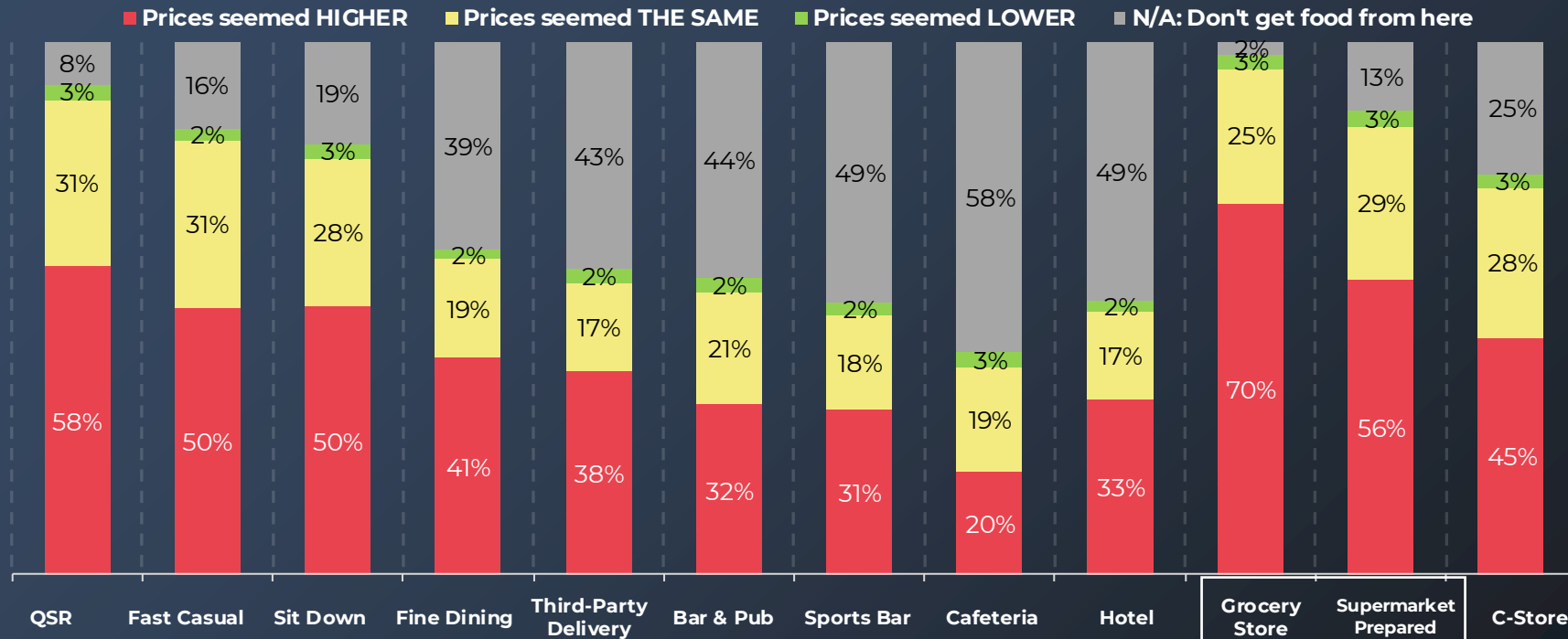
F & B - RELATED CUTS: 12-MONTH VIEW



Consumer: Perception of Foodservice and Grocery Prices

09/26

In The Past Month, Have Consumers Noticed Prices Changing At The Following Venues?



Consumer: Most Popular Saving Strategies

09/26

In The Past Month, How Did Consumers Try To Save Money While Grocery Shopping?

	07/26	08/26	1-mo. change
Buying store brands or private-label brands	43%	52%	9%
Using coupons more often	40%	43%	4%
Visiting lower-cost grocery stores	36%	38%	2%
Making at home what I would buy prepared or packaged	35%	38%	3%
Shopping at multiple stores to find lowest prices	35%	37%	3%
Buying ingredients in bulk to prep and freeze for later	27%	29%	3%
Buying frozen produce instead of fresh produce	22%	26%	4%
Substituting lower-price proteins	20%	23%	3%
Switching from organic brands to regular brands	13%	16%	3%
None of the above	16%	13%	-3%

In The Past Month, How Did Consumers Try To Save Money While Eating Out At Restaurants?

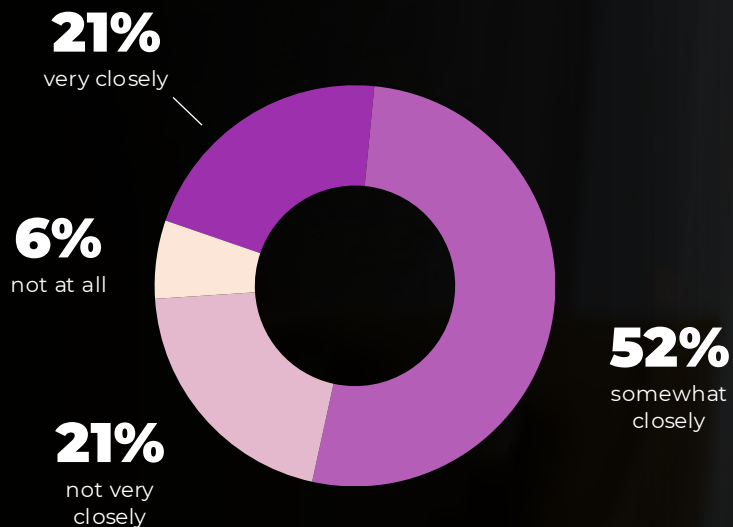
	07/26	08/26	1-mo. change
Choose more affordable venues than usual	26%	33%	7%
Order cheaper menu items than usual	25%	32%	7%
Order fewer or no beverages with my meal	26%	30%	4%
Order fewer or no add-ons (appetizers, sides, etc.)	25%	28%	3%
Look for deals on restaurant apps or delivery apps	22%	26%	4%
Look for restaurant coupons that come in the mail	21%	24%	3%
Stretch a combo or meal deal by saving an item for later	20%	21%	1%
Join restaurant loyalty clubs	19%	20%	1%
Feed a group by splitting add-ons & buying separate entrees	13%	13%	-1%
Look for restaurant "menu hacks" on social media	14%	12%	-2%
Make a meal only of add-ons but skip the entrée	11%	12%	0%
None of the above	28%	23%	-5%

Food Recalls and Outbreaks

Datassential



Closeness of following food safety news



Q: How closely do you follow news about food safety issues, such as outbreaks, product recalls, or public health warnings?

Outbreak responses

Check the product lot number on the product's packaging to confirm if it's affected 52%

Share the news with your friends and family to make sure they're aware 50%

Seek out more information about the issue from official sources (e.g., brand press releases, news articles, etc.) 48%

Stop purchasing that specific product and find a different brand offering the same thing 46%

Seek out more information about the issue from online sources (e.g., Google, social media, etc.) 44%

Avoid other products from that same brand, even if they're unaffected 23%

Stop purchasing that food item altogether, no matter what brand it comes from 20%

None of the above / Does not affect how I shop or eat 9%

Response once recall is over

25%

"Go back to purchasing this product the way I used to."

52%

"Wait a few weeks or months to make sure the issue is fully resolved, then go back to purchasing again."

7%

"Not purchase that specific product again but still buy other products from the affected brand."

6%

"Not purchase anything from that brand again."

11%

"I'm not sure."



The Budget Meal

Datassential



Consumers who work from a single blended food budget set aside an average of \$166.94 a week for food overall.

Those who track the two separately set aside, on average, \$175.56 to groceries and \$74.11 to eating out, roughly a 70/30 split. Among those who only maintain a blended budget for all food occasions, men set aside a higher average amount than women (\$182.93 vs. \$148.06).

How Much Do Consumers Budget For Food Each Week?

(among those who keep a food budget but don't separate between groceries and eating out, n = 526)

\$166.94

Average weekly budget for **FOOD OVERALL** (at home & away from home)

How Much Do Consumers Budget For Groceries Versus Eating Out?

(among those who have separate budgets for groceries and eating out, n = 374)

\$175.56

Average weekly budget for **GROCERIES**

\$74.11

Average weekly budget for **EATING OUT**

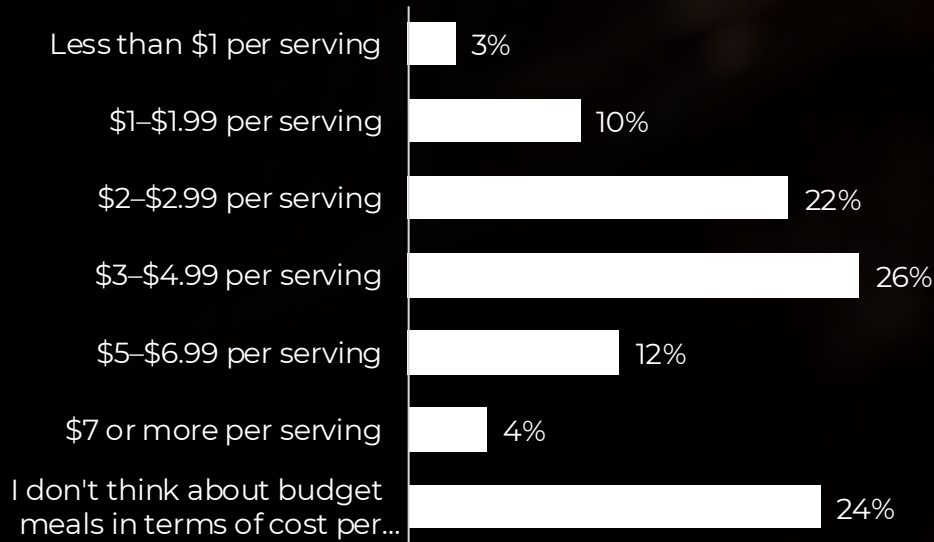
Q: What is your approximate WEEKLY BUDGET for food overall?

Q: What is your approximate WEEKLY BUDGET for groceries vs. eating out (e.g., restaurants, delivery, takeout, etc.)?

Six in ten consumers typically expect a “budget” home-cooked meal to cost less than \$5 per serving.

Men are more likely than women to expect an at-home budget meal to cost roughly \$3–\$5 per serving (30% vs. 21%), and higher earners expect to pay more: 17% of high-income consumers say \$5–\$6.99, against 9% of low-income consumers. Nearly a quarter (24%) don't think about budget meals in per-serving terms at all, especially Boomers.

What Should A Budget Meal Cost To Make At Home?



Q: When you think about a "budget meal" that you cook or prepare AT HOME, approximately how much would you expect to spend PER SERVING?

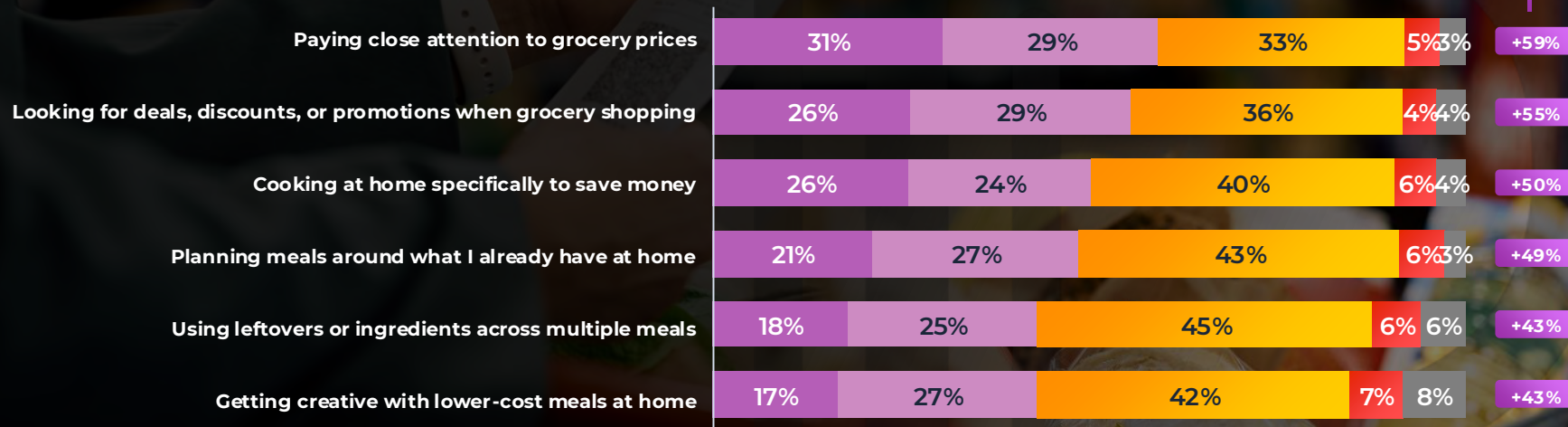
Compared to six months ago, consumers have grown significantly more price vigilant, with 59% saying they now monitor grocery prices more closely.

Nearly a third (31%) are watching grocery prices much more often. Over half (55%) are seeking grocery deals more often, 50% are cooking at home more often specifically to save money, and 49% are more likely to plan meals around ingredients they already have rather than buying more. Women are significantly more vigilant about prices than men (63% vs. 55%) and are also more likely to actively stretch ingredients across multiple meals (46% vs. 40%).

Compared To 6 Months Ago, How Often Are Consumers...

TOP 2 (Much More + Somewhat More)

■ Much More Often ■ Somewhat More Often ■ About The Same



Q: Compared to 6 months ago, how often do you find yourself doing each of the following?

When eating on a budget, consumers are least likely to compromise on food safety, freshness, and acceptable taste.

Meanwhile, consumers are somewhat more willing to compromise on social or cultural values—and even on the experience of eating with others—than on nutrition, ingredients, or the pleasure and enjoyment of eating. Boomers guard nearly every attribute more fiercely than younger diners, leading on food safety (68%), freshness (62%), and recognizable ingredients (42%). Women hold firmer lines than men on nutrition (35% vs. 29%) and enjoyment (32% vs. 25%).

What Won't Consumers Compromise, Even When Eating On A Budget?



Q: If you were eating on a tight budget, which of the following qualities would you be UNWILLING to compromise on?

In the past six months, roughly three-quarters of consumers have made at least one grocery swap to save money.

Switching to a less expensive brand was particularly common: 36% switched from a name brand to a private label, and 28% replaced a premium brand with a cheaper option. Consumers also bought less expensive produce (28%), chose conventional over organic products (27%), and switched from fresh to frozen produce (27%) or protein (26%). Fewer changed pantry staples such as cooking oils, carbohydrates, or sweeteners. Gen X and Boomers are significantly more likely than younger consumers to have made no grocery swaps, at 27% and 30%, respectively.

What Are Consumers Swapping At The Grocery Store?

Switched to a private label or store brand instead of a name brand	36%
Purchased less expensive produce (e.g., apples instead of berries, whole instead of pre-chopped, etc.)	28%
Switched to a cheaper name brand instead of a preferred or premium one	28%
Purchased conventional or regular produce instead of organic	27%
Purchased frozen produce instead of fresh produce	27%
Purchased frozen protein instead of fresh protein options	26%
Switched to less expensive proteins (e.g., thighs instead of breasts, chicken instead of beef, etc.)	24%
Purchased shelf-stable versions of fresh items (e.g., boxed mac and cheese instead of the hot bar, etc.)	22%
Purchased shelf-stable or boxed bakery items (e.g., muffins, cookies, etc. instead of fresh ones)	19%
Purchased less expensive cooking oils (e.g., vegetable oil instead of olive oil or coconut oil, etc.)	16%
Purchased less expensive carb options (e.g., rice instead of quinoa, etc.)	16%
Purchased less expensive sweeteners (e.g., sugar instead of agave or honey, etc.)	12%
None of the above	23%

Q: Have you made any of the following SWAPS or SUBSTITUTIONS while shopping for groceries to save money in the LAST 6 MONTHS?

Nearly eight in ten consumers have changed how they cook at home to stretch their budgets.

In the past six months, nearly a third (32%) started using recipes with fewer ingredients, and 29% chose recipes with less expensive ingredients. Consumers also embraced many forms of batch preparation. 27% began meal prepping for the week, 25% started freezing meals for later, and 21% began prepping ingredients in bulk to shorten cooking time. Notably, 24% have replaced restaurant meals with cooking from scratch, a direct impact on foodservice. Gen Z and Millennials are significantly more likely than Boomers to have adopted many of these tactics; conversely, Boomers are the most likely generation to report no changes to their cooking habits in the past six months (28%).

How Has Home Cooking Changed?

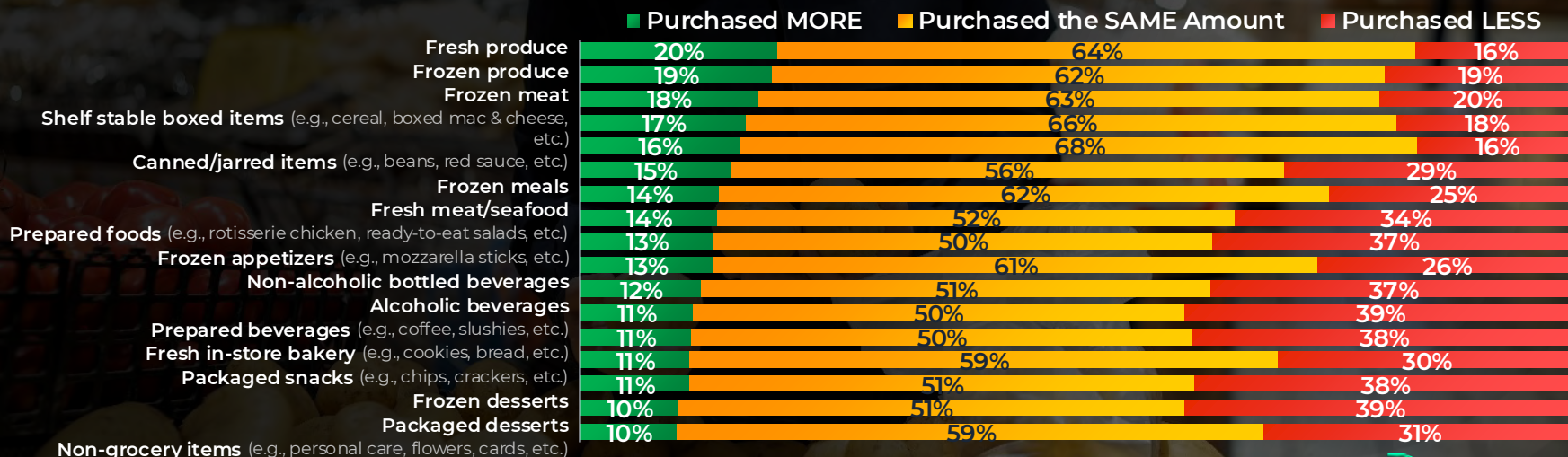
Started cooking simpler recipes that require fewer ingredients	32%
Started cooking recipes that require less expensive ingredients	29%
Cooked big batches of meals more often to eat all week (meal prepping)	27%
Learned to cook new food items (e.g., entrées, desserts, etc.) at home	26%
Cooked big batches of meals more often and froze them to eat later	25%
Made more meals from scratch that I was previously sourcing from a restaurant	24%
Prepped more individual ingredients in bulk and froze them for later use	21%
Made more meals from scratch that I was previously eating prepared versions of	19%
Made more meals from scratch that I was previously eating frozen meal versions of	18%
Learned to make new beverages at home	12%
None of the above	21%

Q: Thinking about cooking at home, have you done any of the following in the LAST 6 MONTHS?

Fresh produce is the only grocery category where more consumers are buying more rather than less in the past six months, with higher-income households driving that strength.

One in five consumers are buying more fresh produce than six months ago, compared with 16% buying less. In every other category measured, the share of consumers cutting back exceed those increasing purchases, though most report no change. Treats and ready-made foods face the steepest cuts at retail. Roughly four in ten consumers are buying fewer packaged desserts, prepared beverages, bakery items, and frozen desserts when grocery shopping, while a third are buying fewer prepared foods. Income sharply divides these patterns. Low-income consumers are significantly more likely to cut back in 12 of the 17 categories measured, including staples such as fresh and frozen produce and shelf-stable boxed foods. Higher-income consumers are significantly more likely to maintain purchases across most categories or even increase them in some. For example, 27% of high-income earners are buying more fresh produce nowadays, compared to just 8% buying less.

How Have Grocery Habits Changed In The Past 6 Months?



Q: Within the PAST 6 MONTHS, how has your purchasing of specific grocery items changed?

Thank You

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

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