

The meat department delivered a stellar performance in 2025, reaching a record \$112 billion.

Dollar gains of 6.8% alongside 2.0% pound growth reinforced meat's position as the largest and fastest-growing fresh perimeter department in 2025. Gains were driven by more households buying meat, increased shopping frequency and higher spend per trip. Beef generated 70% of dollar gains and 56% of pound growth. (Circana MULO+).

Although consumers navigate financial pressure, meat and poultry remain both dietary and budget priorities.

Meat and poultry are prioritized in household budgets, though many consumers constantly recalibrate spending through where, what and how much they buy. Shoppers balance 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.

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 meat and poultry purchase driver. Younger shoppers show a greater willingness to pay extra for brands and attributes that align with their values.

Meal decisions are shaped by more than price alone, with a growing role for digital discovery.

Interest in transparency, health and sustainability remains strong, particularly among financially well-off consumers. Social media, search engines and artificial intelligence are increasingly influential sources of meal and meat cut and preparation inspiration, signaling new opportunities to engage shoppers earlier in the planning process.



Meat and poultry anchor all meals, with dinner doing the heavy protein lifting.

At-home meal occasions remain elevated, calling for versatile cuts and formats that work across breakfast, lunch and dinner, as well as an increasingly important protein snacking occasion. Time-saving solutions continue to gain traction as shoppers look to simplify meal preparation without sacrificing quality, prompting growth for fully-cooked, ready-to-heat and value-added meat and poultry.

Meat dollars continue to shift toward the mass, club and online channels, as shoppers seek value and efficiency.

While traditional supermarkets remain central to meat and poultry purchases, cross-channel shopping is now the norm, requiring strong differentiation to maintain engagement and share. Service counters can serve as an important trust-building tool, while case-ready meat and poultry continue to enjoy strong consumer acceptance.

Health remains a powerful driver of meat and poultry consumption, with protein at its center.

Shoppers see meat and poultry as all-around nutrient powerhouses and an overall healthy choice. Protein has been an area of growing importance to 42% of Americans. Consumers relate meat and poultry to strength, energy and overall wellness. This creates opportunities to reinforce meat and poultry's role in balanced diets and to educate consumers on nutrient density, protein quality and other nutrients, including iron, zinc and B-vitamins.



Consumers using GLP-1 medications focus on protein, nutrient density and satiety.

GLP-1 consumers over-index for meat and poultry at breakfast and for snacking occasions. While many report increasing meat and poultry intake over the past year, they also heavily engage with other high-protein products.

Interest in animal raising and sourcing transparency remains elevated, with claims-based meat gaining traction.

Organic and/or grass-fed meat and poultry grew dollars, units and pounds by double digits in 2025, underscoring the importance of clear, credible and ongoing communications around production practices. Beyond valuing sourcing and production transparency, more than half of consumers want to make food and packaging choices that help the planet.

The changing of the guard: Gen Z and Millennials accounted for 67% of all unit growth in 2025.

Boomers have long dominated meat department spending, but Gen Z and Millennials together accounted for two-thirds of all unit growth in 2025. This rapid demographic shift points to a need to re-align assortment, marketing and merchandising to reflect the new market reality. Gen Z and Millennials place greater emphasis on health benefits, convenience and sustainability along with vastly different store and meal choices, preparation devices, cook time and sources of inspiration.



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