THE POWER OF MEAT 2025

A sizzling meat department performance led to new sales records in 2024.
Meat was the MVP of the fresh perimeter in 2024, with a record $105 billion in sales, 98.2% household penetration and 54 trips per year. Dollar sales grew 4.7% and pounds 2.3% year-on-year, with a lead role for beef. Ground beef was the number one in absolute dollar growth out of 85,000 center-store and perishable subcategories (Circana MULO+).

Today's meal lineup is heavily influenced by the external marketplace, with the meat department offering value.
94% of consumers are concerned over today's cost of living, leading to more focus on price and promotions, but always hand-in-hand with taste and quality. More meal planning, more trips and larger packages corresponded to an increase in home-prepared dinners with meat. Both value and premium cuts/kinds grew as consumers sought to replace restaurant occasions.

Routine purchases are the department's friend and foe: the top 10 sellers reflected 56% of unit sales in 2024.
Purchasing a greater variety of cuts and kinds is the key to more home-prepared meals with meat/poultry — underscoring the importance of innovation, lowering trial barriers and growing confidence in selecting and preparing new cuts/kinds.

Taste is the ultimate driver of buying the same cut/kind of meat or poultry again.
58% of consumers have tried-and-true meat/poultry favorites but would be interested in exploring more. The barriers are cost, habit and lack of cooking confidence beyond the basics. Top areas of interest for new recipes include comfort meals, quick preparation options and creative ways to cook with basic ingredients, such as chicken and ground beef. Younger shoppers are more interested in speedy, indulgent and global recipes.

94% of consumers can be persuaded to spend a little more on meat and poultry when the time is right.
A hot sales promotion and holidays are the top reasons to spend a little more on meat/poultry — emphasizing the opportunity in leaning into primary, secondary and self-invented holidays. A cut or kind of meat/poultry consumers deem healthier, a preferred pack size or brand and convenience can also prompt them to splurge.

Time-saving shortcuts are becoming standard fare, but go beyond value-added meat/poultry.
Balancing time and money, 53% of consumers describe their typical meal preparation as a mix of items cooked from scratch and semi- and/or fully-prepared items. Consumers seek convenience in meal planning, shopping and preparation — increasingly integrating value-added, deli-prepared and frozen meat and poultry solutions into their meal lineup.

More than 7 in 10 consumers believe meat and poultry are nutrient powerhouses and an overall healthy choice.
Eating meat is the norm. The nation's eye is on protein, with 90% believing it is important to consume ample protein daily, with 59% tracking their intake. Better consumer understanding of the benefits of high-quality protein along with a focus on other key nutrients in meat/poultry could further strengthen nutrition's positive role in meat/poultry purchases.

Consumers increasingly seek transparency into animal raising and sourcing standards.
Half of consumers feel positive about animal raising practices in the U.S. and four in 10 trust that their grocery stores sell humanely-raised meat. Others are unclear or have doubts. A focus on animal welfare and/or environmental sustainability most commonly leads to purchasing meat/poultry with specific claims, such as humanely-raised, grass-fed and organic, which experienced strong sales growth in 2024.

The supermarket share of meat dollars continued to decline while EDLP formats gained share.
Traditional grocery's share of meat sales dropped from 52.8% in 2019 to 46.3% in 2024 — a shift of several billion dollars (Circana, all outlets). Driven by strong Millennial engagement, supercenters, club and online gained share over the past 20 years. Consumers increasingly regard case-ready meat as good or even better than meat and poultry that is cut in store, but do seek portion size variety — both small and bulk packages, and packaging benefits such as extended shelf life.

With Millennials representing 62% of all new unit sales in 2024, the meat case of the future is upon us.
In addition to adjusting for current marketplace trends focused on value, longer-term demographic shifts point to an opportunity to re-align assortment, marketing and merchandising to reflect the growing Millennial role in meat sales. Millennials' approach to meat and poultry is vastly different than that of Boomers, including the what, where and why. This points to a growing role for health benefits, convenience and sustainability as the factors driving the meat/poultry purchase are changing along with meal favorites, preparation devices, cook time and inspiration.

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