THE POWER OF MEAT 2026

ANNUAL MEAT CONFERENCE

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.

Beef Demand Dominates

Total meat sales record-high last year.

by ***Wes Ishmael***

Domestic consumer demand for meat, especially beef, shined brighter than ever last year, according to the 21st annual *Power of Meat* report (POM) released in March at the Annual Meat Conference hosted by the Meat Institute and FMI, The Food Industry Association.

Meat sales hit a record high $112 billion in 2025 with a pound increase of 2%, according to Circana data[1]. Millennials and Gen Z were a driving force behind the growth.

Beef dominated meat purchases, accounting for $45 billion in sales, and representing 40% of meat department dollars, according to the report. Beef also generated 71% of the department's dollar gains and 57% of total volume gains in 2025.

"The meat department is outperforming because it delivers what shoppers want right now: protein, flexibility, value and taste," says Rick Stein, FMI vice president of fresh foods. "Retailers that balance convenient ground options with premium, indulgent cuts will be best positioned to capture both budget-conscious and experience-driven shoppers."

More than 98% of American households purchase meat, according to Circana data, and 45% of shoppers are actively trying to prepare more meals containing meat or poultry. Of the five dinners shoppers prepare at home per week on average, 90% already contain a portion of meat and/or poultry, according to 210 Analytics.

Generational transition

Based on Circana data, Millennials and Gen Z shoppers accounted for 67% of unit growth, and they are more likely than other shoppers to be actively trying to prepare more meals containing meat or poultry.

Moreover, children and teens influence household meat buying. Specifically, kids have some level of influence on meat and poultry purchase decisions in 81% of households with children, according to the report. Similarly, 72% of shoppers with teens at home say their teens request meat and poultry, far ahead of requests for protein bars, shakes and powders.

Younger generations also lead the way in using social media and artificial intelligence (AI) platforms for meal inspiration. Twenty-four percent of Gen Z and Millennial shoppers use AI tools, compared to 10% of Gen X and 4% of Boomers. Overall, 15% of shoppers use AI tools, a 650% increase over two years ago.

Meat for health

Positive health and nutrition perceptions about meat and poultry continue to influence buying decisions with 77% of shoppers agreeing that meat and poultry are part of a healthy diet, up more than 20% since 2020.

"Americans are more focused on making smart food choices than ever before, and this latest *Power of Meat* report reinforces meat's clear and irreplaceable role at the center of healthy, convenient, affordable meals today and for generations to come," explains Julie Anna Potts, Meat Institute president and CEO.

If you were wondering, plant-based meat alternatives, once vaunted but never popular, continue to lose consumer appeal.

"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," according to the report. "Pound sales peaked in 2020, and volume for both refrigerated and frozen alternatives has now dropped below 2019 levels. Fewer than 6% of U.S. households purchased refrigerated plant-based meat alternatives in 2025, down 3.7% year-over-year ..." HW

[1]Sales and purchase dynamics data are provided by Circana for the 52 weeks ending 12/28/25.
The *Power of Meat* study was conducted by 210 Analytics on behalf of FMI-The Food Industry Association and the Meat Foundation and sponsored by CRYOVAC® Brand Food Packaging.