



International DAIRY DELI BAKERY Association

From Brie to Brioche

IDDBA Trends 2026

Presented by:
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IDDBA Trends 2026

From Brie to Brioche: The Top Trends in Dairy, Deli and Bakery










- Consumer survey
 - May 2026 among 1,555 shoppers
 - Market examples featuring 100+ stores from 15+ countries
 - Shopper videos from across the country
 - Made possible by Tyson
- Sales overlay by Circana
 - MULO+ universe
- Developed in close cooperation with every link of the supply chain



Marketplace dynamics drove retail gains

The meat and deli departments are the MVPs of the grocery store

Dollar and unit sales growth 52 weeks ending 3/29/2026

									
	Total store	Frozen	Grocery	Dairy	Produce	Meat	Deli	Bakery	Seafood
Dollar sales	\$964B	\$88B	\$263B	\$106B	\$97B	\$113B	\$56B	\$49B	\$9B
Dollars vs. YA	+3.1%	+2.0%	+3.0%	+0.9%	+2.4%	+6.5%	+3.0%	+0.7%	+2.7%
Units vs. YA	+0.8%	+0.1%	+0.5%	+1.3%	+1.3%	+1.6%	+2.1%	-1.4%	-0.2%

Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

Dairy

Protein quest drives growth

\$90.0B

L-52 week sales

+0.7%

Dollars vs. YA

+1.7%

Units vs. YA

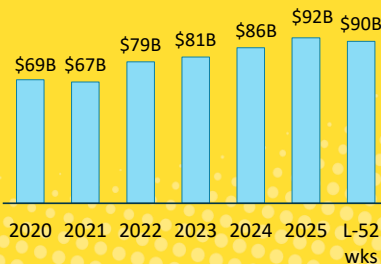


Dairy dynamics

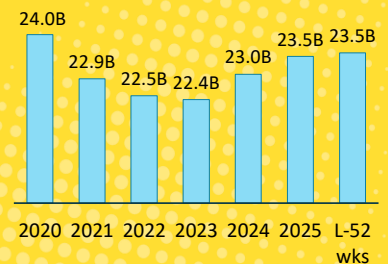
- ↔ 99.4% households buying
- ▲ 72 annual trips/buyer
- ▼ 2.9 units/trip
- ▲ 211 units/buyer/year
- ▲ \$725 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

Dairy dollar sales



Dairy unit sales



Winning categories in absolute YOY unit growth

Yogurt | \$13B

4.6B units
+214M
+4.9%



Cottage cheese | \$2B

639M units
+73M
+12.9%



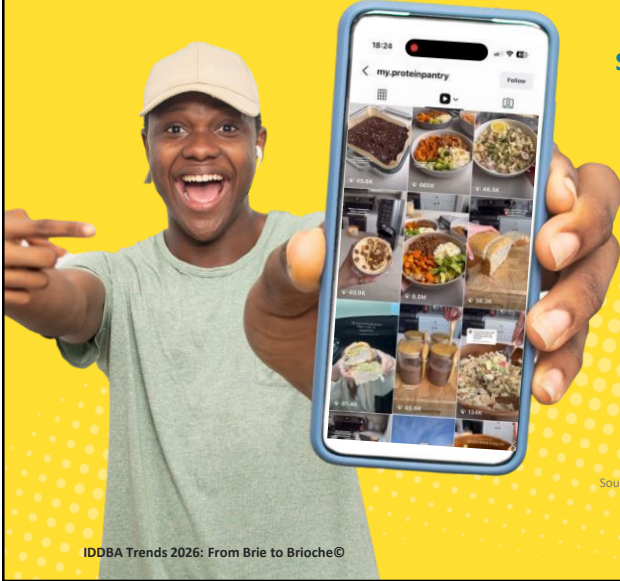
Eggs | \$14B

2.8B units
+48M
+1.8%



Viral fame paid off for cottage cheese

The most Googled recipe delivered double-digit gains for all components



Sales and shopping dynamics

	Dollar sales vs. YA	Pound sales vs. YA	Households buying vs. YA	Trips vs. YA
	+19.4%	+15.1%	↑	↑
	+14.7%	+3.1%	↑	↑
	+17.3%	+12.6%	↑	↑

Source: Google Trends | Circana, Integrated Fresh, Total U.S., 52 w.e. 4/26/2026

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Dairy growth reflects the nation's health focus

Real ingredients, protein, functional benefits, low carb and animal welfare



Pictures: 210 Analytics

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Bakery

Mixed results

\$49.3B
L-52 week sales

+0.7%
Dollars vs. YA

-1.4%
Units vs. YA

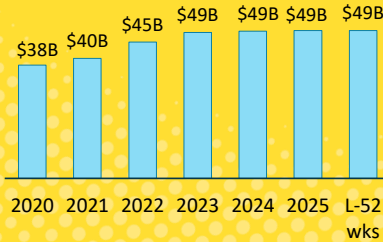


Perimeter bakery dynamics

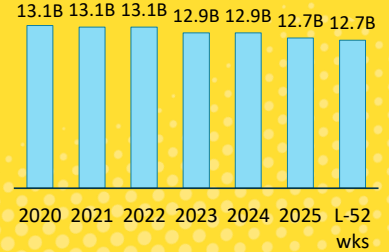
- ↕ 96.7% households buying
- ↕ 32 annual trips/buyer
- ↕ 1.4 units/trip
- ▲ 44 units/buyer/year
- ▲ \$208 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

Bakery dollar sales



Bakery unit sales



Winning categories in YOY absolute unit growth (all perimeter vs. aisle)

Category	Value	Units	YOY Growth
Cake	\$6.5B	838M units	+26.4M (+3.3%)
Muffins	\$1.7B	359M units	+21.0M (+6.2%)
Pastries	\$2.1B	437M units	+15.3M (+3.6%)
Donuts	\$1.9B	638M units	+14.7M (+3.6%)

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Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

Innovation helped drive growth for donuts

Product size, holidays, pop culture, flavors and packaging configurations



Pictures: 210 Analytics

Glazed remains America's favorite donut type (28%)



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Deli meat

Ongoing pressure

\$8.6B
L-52 week sales

+0.3%
Dollars vs. YA

-1.9%
Units vs. YA

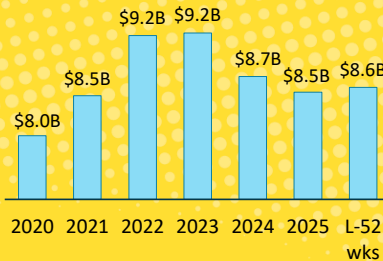


Deli meat dynamics

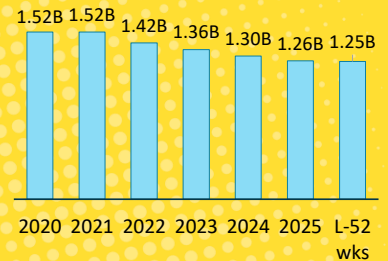
- ▼ 94.0% households buying
- ▲ 11.2 annual trips/buyer
- ◀▶ 1.4 units/trip
- ◀▶ 15.7 units/buyer/year
- ▲ \$104 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

Deli meat dollar sales



Deli meat unit sales



Winning categories in YOY absolute unit growth

Grab & go ham | \$776M
127M units
+8.2M
+7.0%



Grab & go pepperoni | \$72M
19M units
+3.2M
+20.5%



Grab & go turkey | \$1.0B
136.6M units
+1.5M
+1.1%



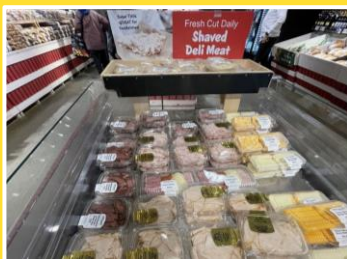
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Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

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Grab & go is delivering growth for deli meat

Innovations in snacking and convenience drive new/different engagement



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Pictures: 210 Analytics

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Deli cheese

Growth powerhouse

\$9.1B
L-52 week sales

+4.0%
Dollars vs. YA

+2.6%
Units vs. YA

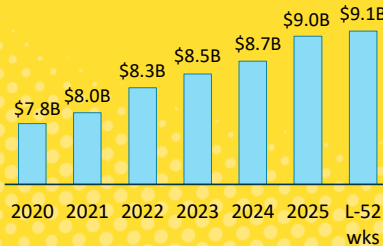


Deli cheese dynamics

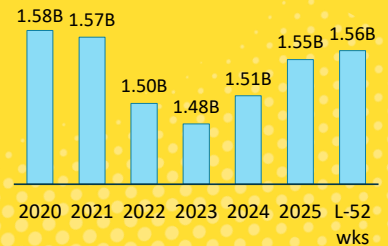
- ↔ 79.8% households buying
- ▲ 12.3 annual trips/buyer
- ↔ 1.4 units/trip
- ▲ 16.8 units/buyer/year
- ▲ \$104 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

Deli cheese dollar sales



Deli cheese unit sales



Winning categories in YOY absolute unit growth

Specialty Mozzarella | \$1.0B
205M units
+14M
+7.0%

Specialty Hispanic | \$929M
167M units
+11M
+6.9%

Specialty Parmesan | \$595M
81M units
+8M
+11.2%

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Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

Grab & go and specialty cheese gained big

Capitalize on the excellent cross-merchandising opportunities in cheese



Pictures: 210 Analytics

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Top specialty cheese co-purchases:

- Fresh basil, arugula and cilantro
- Salami
- Naan
- Specialty pasta

Circana, Integrated Fresh, Total U.S., 52 w.e. 4/19/2026

Deli prepared

Replacing restaurant trips

\$31.7B

L-52 week sales

+3.7%

Dollars vs. YA

+3.3%

Units vs. YA

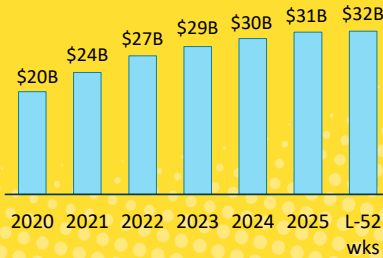


Deli prepared dynamics

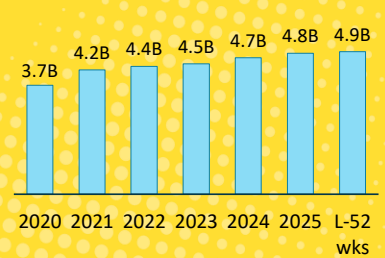
- ▲ 94.6% households buying
- ▲ 12.3 annual trips/buyer
- ↕ 1.5 units/trip
- ▲ 60.4 units/buyer/year
- ▲ \$104 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

Deli prepared dollar sales



Deli prepared unit sales



Winning categories in YOY absolute unit growth

Category	Value	YOY Growth
Entrees	\$9.2B	+52.6M units
Sandwiches	\$3.9B	+49.7M units
Appetizers	\$2.5B	+23.1M units
Prep. meat	\$6.5B	+19.8M units
		+4.9%
		+7.9%
		+6.6%
		+2.1%

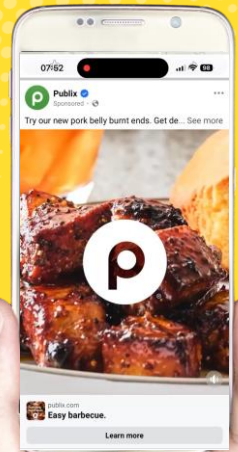
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Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

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Everything is working for deli-prepared

Ready-to-heat, ready-to-cook and ready-to-eat innovation is driving growth



Pictures: 210 Analytics

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Deli is stepping up as a restaurant replacement

It's about great taste and value

18%

of consumers are purchasing deli-prepared food and meals more often than last year

% more often:

- 33% Gen Z
- 25% Millennials
- 13% Gen X
- 8% Boomers
- 29% Well-off
- 7% Struggling

Reasons for purchasing deli-prepared foods more often

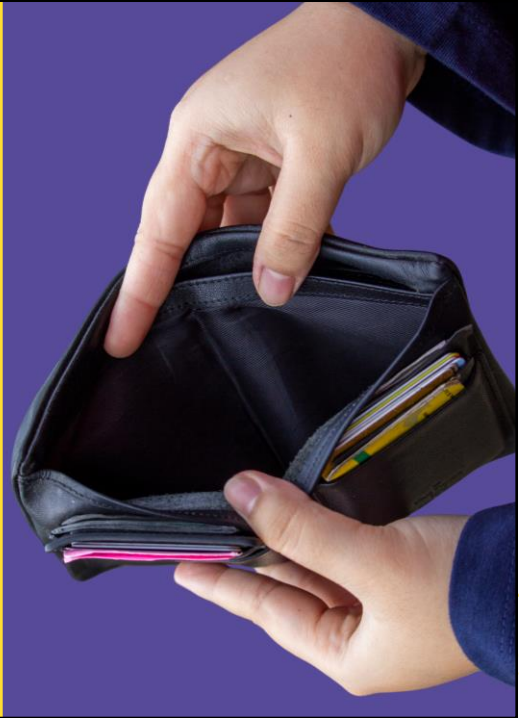
- 47% Great tasting food
- 47% Great value
- 33% Time-saving convenience
- 31% Ability to select exactly what I like
- 30% Replacing restaurant meals/food
- 30% Better prices and promotions than before
- 27% Replacing items/meals I typically cook from scratch
- 26% Ability to purchase just as much as I need
- 23% Buy different things for different people
- 19% New consumption occasion, like breakfast or lunch
- 18% Store added new items/expanded assortment
- 15% No specific reason, simply buying more

Solving life's complex puzzle



Spending with Purpose

Sustained inflation is prompting consumers to balance value-seeking behaviors with selective splurges, creating a bifurcated marketplace that rewards both sharp value execution and well-timed premium offers.



Today's cost of living prompts wide concern

The average price per unit for all food/beverages is 40% more than in 2019

Concern about today's cost of living



Average price per unit:



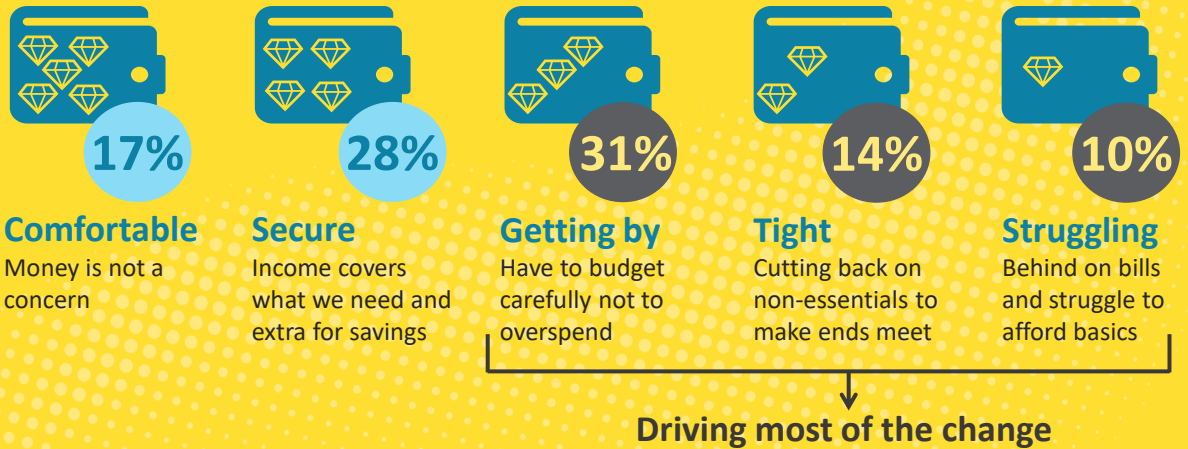
Source: Circana, Integrated Fresh, Total U.S., MULO, 52 w.e. 4/19/2026



Spending patterns vary widely based on finances

The more financial pressure, the more focus on price and promotions

Description of financial situation



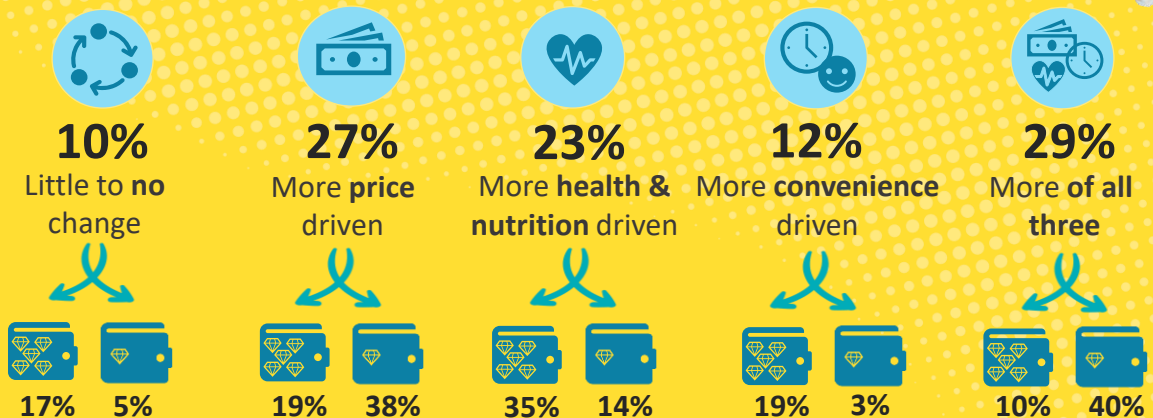
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Meal dollars are on the move

More price and health-driven shopping in the past two years

Grocery shopping habits compared with 2 years ago



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Spending patterns vary widely based on finances

The more financial pressure, the more focus on price and promotions

Top 3 purchase factors when buying yogurt (or similar dairy item)



Spending is more intentional

Focused on stretching the food dollar

Food/meal-related habits compared to last year (% do more):

- 49% Reviewing what items are on sale (pre-trip or in-store)
- 48% Planning meals and creating shopping lists
- 46% Cooking from scratch versus semi- or fully-prepared items
- 22% Entertaining guests at home versus meeting at a bar/restaurant
- 20% Celebrating holidays, such as Thanksgiving or Valentine's Day
- 20% Celebrating special occasions (birthdays, anniversaries, etc.)
- 19% Buying restaurant food (on premise, takeout or delivery)
- 18% Buying prepared foods from the grocery store deli



	% Do/buy more than last year	
Review sales	40%	59%
Plan meals	44%	56%
Scratch cook	39%	54%
Home entertaining	23%	23%
Holidays	24%	17%
Special occasions	21%	16%

Promotions continue to wield power

While even more are focused on essentials

Promotional research (% occasionally & frequently)



70%

compare dairy, bakery and deli promotions across different stores pre-trip



83%

check promotions at their main store pre-trip



85%

focus on buying only what and how much they need



Unit trade efficiency (% any merch)

Dairy aisle
9.8% | +4.1% vs. YA

Bakery department
8.9% | -6.4% vs. YA

Deli department
7.6% | -2.9% vs. YA

Source: Circana, Integrated Fresh, Total US, MULO, 52 w.e. 4/19/26

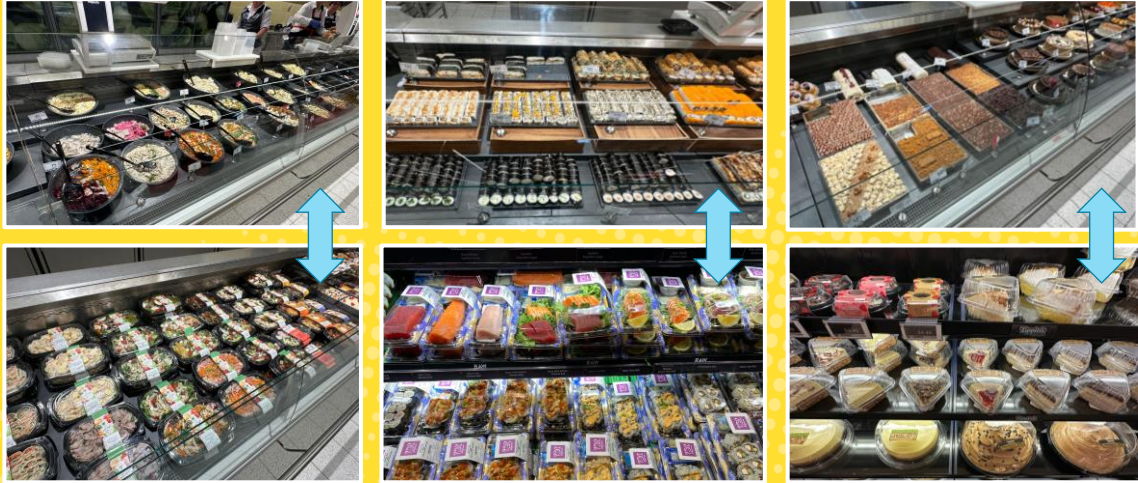
Highlight the value of deli/home-prepared meals

Different price points can be a way to upsell



Integrate bulk and packaged offerings

Ensure pack size variety for different occasions, household sizes and budgets



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Pictures: Z10 Analytics

Help consumers with meal planning to be on the list

Interest in steady meal days peaks among generations juggling kids and careers

Interest in steady deli food promotional days, such as pizza deals on Friday and sushi discounts on Wednesday

45%

Somewhat (23%) or very (22%) interested

Interested by generation

- 44% Gen Z
- 53% Millennials
- 50% Gen X
- 35% Boomers



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Holidays will increasingly be a time to spend with guests instead of in the kitchen

Interest in holiday meals with a variety of sizes, such as turkey/ham, sides and desserts for Thanksgiving

8 in 10

are somewhat (57%) or very (23%) interested

Very interested by generation

- 32% Gen Z
- 28% Millennials
- 20% Gen X
- 15% Boomers

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Easy holiday entertaining is another opportunity

Especially with 22% of consumers entertaining at home more often



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Pictures: 210 Analytics

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Budget balancing leads to all-around change

No elimination, but recalibrating the what, how much and where

Grocery money-saving measures (% of shoppers):



39%

eat out at or order in from restaurants less often



64%

What groceries you buy



62%

How much you buy (items and pack size)



57%

Where you purchase your groceries



67%

What brands of groceries you buy

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Pack size strategies vary widely

Household size and income/financial situation have the greatest impact

Changes to pack size strategies due to inflation (% of shoppers):



45%

buy smaller packages for a lower price point



55%

buy larger bulk/family packs to save over time



35% **62%**



65% **38%**



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Private brand popularity

Illustrated by above-average growth

Purchasing private brands in the past year (% of shoppers)



42%

are **more** likely to purchase store brands



11%

are **less** likely to purchase store brands



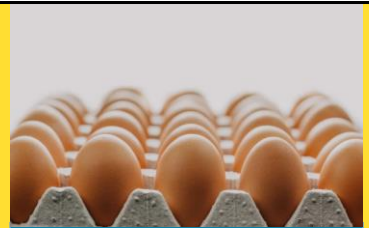
47%

say **best price** is more important than brand

41%



55%



Deli units vs. year ago

33.2% Private brand share
+1.8% vs. YA

Bakery units vs. year ago

49.2% Private brand share
-1.2% vs. YA

Dairy units vs. year ago

47.7% Private brand share
+1.1% vs. YA

Source: Circana, Integrated Fresh, Total US, MULO, 52 w.e. 4/19/26

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Value-forward channels are winning

Younger consumers are driving the switch to value and convenience

Channels shopped

	Gen Z	Boomers
60% Supermarket/grocery store	45%	70%
57% Supercenter/mass	55%	54%
32% Club stores	31%	24%
34% Discount/dollar stores	37%	31%
17% Specialty/organic stores	29%	11%
11% Drug stores	17%	6%
15% Convenience stores/gas stations	28%	5%
13% Online	19%	6%
11% Farmers' markets	18%	8%
6% TikTok Shop or other social media shops	17%	0%
5% Other (bodegas, corner stores, etc.)	14%	0%



◊ over index ◊ under index

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Channel shifts are echoed in sales shares

Online sales drove much of the total food and beverage growth in the past year

Dollar channel share total food and beverages

	2022	L-52 weeks	Dairy	Deli	Bakery
Traditional grocery	42.8%	39.0%	43.8%	36.3%	43.4%
Mass & Supercenter	20.6%	21.1%	24.4%	8.2%	20.0%
Club	12.6%	13.5%	11.7%	12.2%	10.8%
Discount grocery	6.9%	6.9%	8.6%	4.9%	7.4%
Specialty stores	4.0%	4.1%	0.6%	31.5%	7.1%
Online	3.2%	5.4%	4.7%	2.4%	3.9%
Health/organic specialty	2.1%	2.1%	2.2%	2.7%	2.1%
Other	7.8%	8.3%	4.1%	1.9%	5.3%



Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026 | | ♦ Over index ♦ Under index

The best news:

Plenty of reasons to splurge a little, led by brands and special occasions

92%

can be persuaded to spend a bit more than planned



Reasons to splurge a little on dairy, deli or bakery (% of all shoppers)

- 42% For a brand I like
- 42% For a special occasion (birthdays, movie/date nights, etc.)
- 41% For my all-time favorite
- 34% For a holiday (Mother's Day, Halloween, or Valentine's Day)
- 32% To do something nice for myself
- 30% If it's a little healthier
- 29% To do something nice for someone else/gifting
- 19% Replacing a restaurant meal that would have cost more
- 19% Portion/pack size that I wanted
- 10% If it's produced more sustainably, ethically, or humanely

Optimize permissibility for everyday indulgences

Big role for functional and global beverages and snack occasions

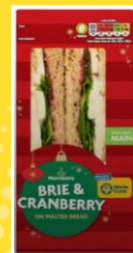


Pictures: 210 Analytics



Optimizing sales during special occasions and holidays

Seasonal classics in different formats can drive additional purchases



Capturing the whole cart

Mix-and-match meal solutions from appetizers to desserts



Pictures: 210 Analytics

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Optimize engagement with secondary holidays

From St. Patrick's Day to Merry Birthday or inventing your own



Pictures: 210 Analytics

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Summer is evolving into its own season

Opportunity to tie into events and grilling season

hen house
TASTE FLIGHT
YOUR JOURNEY TO A WORLD OF FLAVOR STARTS HERE
FROM APRIL 29
TO JUNE 10
EXPLORE HIGH-REPUTE FOODS FROM THE COUNTRIES COMING TO KANSAS CITY FOR THE WORLD CUP THIS SUMMER
HALLMARK

Sweet-heat summer is here.
Discover over 10 new items.

WAITROSE
SUMMER
TUNA NICOISE

SUMMER B.B.Q.
PISTACHIO & HONEY BAKING PEAR

Pictures: 210 Analytics

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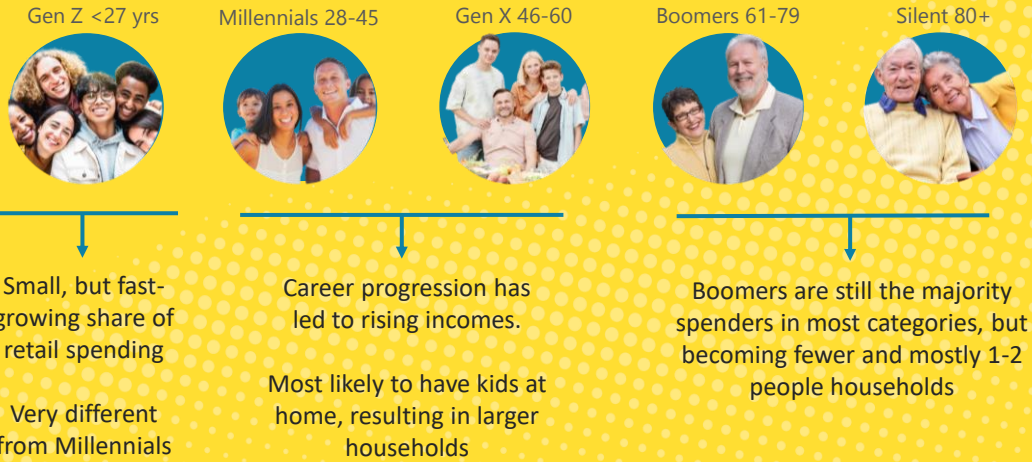
A New Chapter

After 30 years of Boomers representing the majority share of spending, Gen Z and Millennials are poised to take over in 2-3 years. This affects everything from the what and where to appliances used, dishes prepared and the focus on convenience and sustainability.



Our “who” is changing rapidly

A frightening reality? Millennials will qualify for AARP in 4-5 years



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Boomers are still the majority spender at retail, but for how long?

Gen Z and Millennials combined (<45 years old) match X-ers and Boomers

To understand the trends, we have to understand the who

1. Who is generating the sales today?
2. Who is driving the growth fueling sales tomorrow?
3. What are the differences in their approach to buying groceries/making meals?

Share of unit sales by generation

	Total food/bev	Center store	Perishables
Gen Z	5.0%	4.9%	5.1%
Millennials	27.5%	27.4%	27.6%
Gen X	32.4%	32.8%	31.8%
Boomers	33.4%	33.2%	33.6%
Silent Gen	1.7%	1.7%	1.9%

Source: Circana, Integrated Fresh, Receipt Panel, Total US, 52 w.e. 4/19/2026

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Gen Z is fueling sales growth

Gen Z and Millennials are fueling growth; Silent generation spending is down

To understand the trends, we have to understand the who

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3. What are the differences in their approach to buying groceries/making meals?

Unit sales growth by generation

	Total food/bev	Dry grocery	Total perishables
Gen Z	+6.2%	+5.2%	+8.3%
Millennials	+0.9%	+0.0%	+2.6%
Gen X	+0.2%	-0.7%	+2.0%
Boomers	+2.2%	+1.5%	+3.7%
Silent Gen	-8.3%	-10.3%	-4.8%

Source: Circana, Integrated Fresh, Household Panel, Total US, 52 w.e. 4/19/2026

Combined market and demographic forces will result in 360° of change

To understand the trends, we have to understand the who

1. Who is driving sales today?
2. Who is driving the growth fueling sales tomorrow?
3. What are the differences in their approach to buying groceries/making meals?

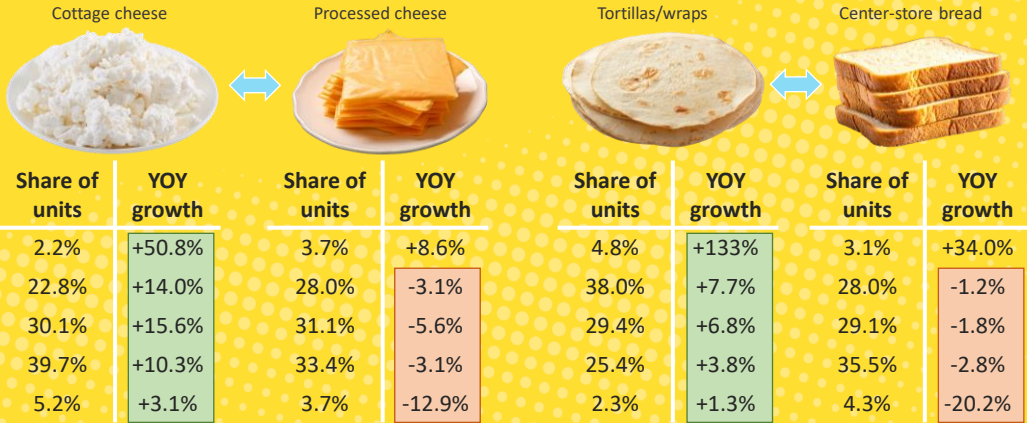
Gen Z over index for:

- Meal adventures/global cuisines, resulting in different items/brands purchased
- Interest in speedy meals and lunchbox solutions
- Ready-to-heat and ready-to-cook
- Functional health benefits
- Production claims like organic, all natural, non-GMO, grass-fed, etc.
- Sustainability influence on purchase
- Retailers and brands who align with their values
- Over-index for supercenters, clubs and online

For example... Cottage cheese vs. processed cheese

Or tortillas vs. center-store bread: sales momentum lies with Gen Z & Millennials

Share of unit sales and YOY unit growth by generation



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Different generations, different tone of voice

Meme culture is infiltrating marketing and packaging

Pictures: 210 Analytics

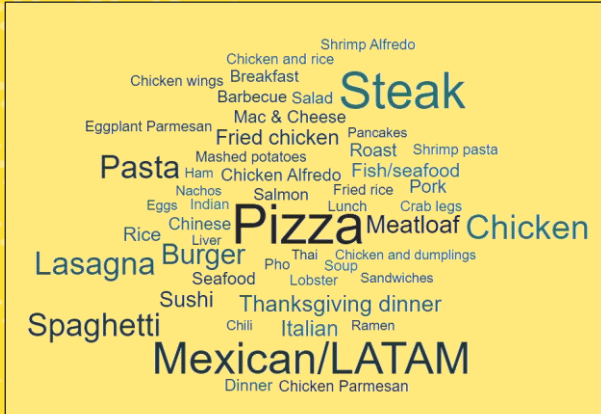
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All-time favorite meal reflects cuisine shakeup

Move to more global cuisines while comfort meals look different

All-time favorite meal (size of font reflects frequency of mention)



Fun facts

- No one aged 60+ mentioned:
 - Pho
 - Ramen
 - Mac & cheese
- No one under 25 mentioned:
 - Pork/roast
 - Meatloaf
 - Chicken and dumplings

The font size corresponds to the number of mentions

Leading to growing crossover and global offerings

Economic pressure can lead to some exploration trepidation



Pictures: 210 Analytics

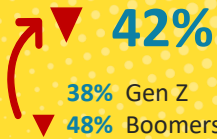
Hybrid meals are on the rise

Compared to 2023, fewer Boomers cook from scratch

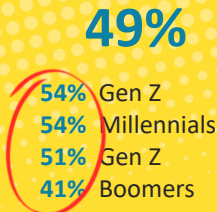
Description of meals typically prepared at home



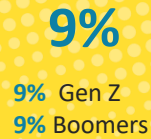
Cooking mostly from scratch



Mix of scratch-cooked and semi- and fully-prepared items



Mostly semi- and fully-prepared items (may just need reheating)



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The need for speed is deli and bakery's strength

The average time spent on meals decreases along with age

Preparing dinner:

67%

of meals take **less than 30 minutes to make**

54%

of consumers **are confident** preparing all sorts of foods and cuisines



Source: 210 Analytics | January 2026

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Stores can be a helping hand

Easing the mental load of figuring out what's for dinner, snacks, lunch, etc.



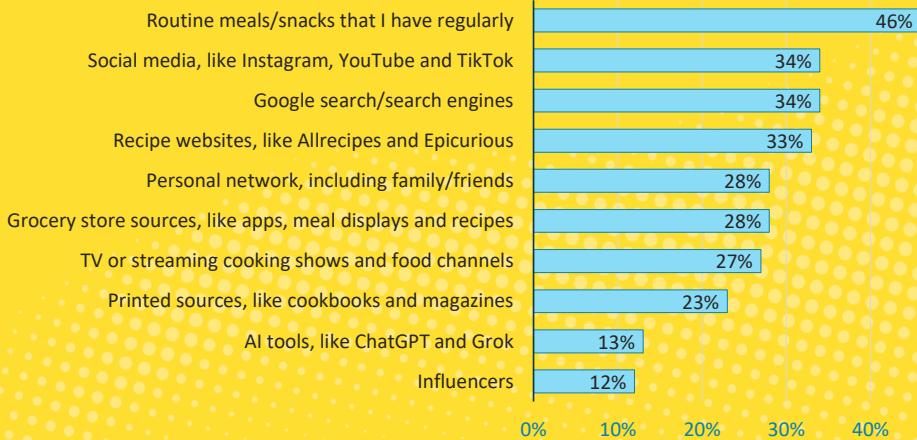
Pictures: 210 Analytics

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Digital is dominant in meal inspiration

Substantial generational gaps

Sources of meal or snack inspiration



Meal/snack inspiration

- Gen Z**
 - 55% Social media
 - 38% Search engines
- Millennials**
 - 44% Social media
 - 36% Routine meals
- Gen X**
 - 49% Routine meals
 - 37% Recipe websites
- Boomers**
 - 60% Routine meals
 - 29% Printed resources

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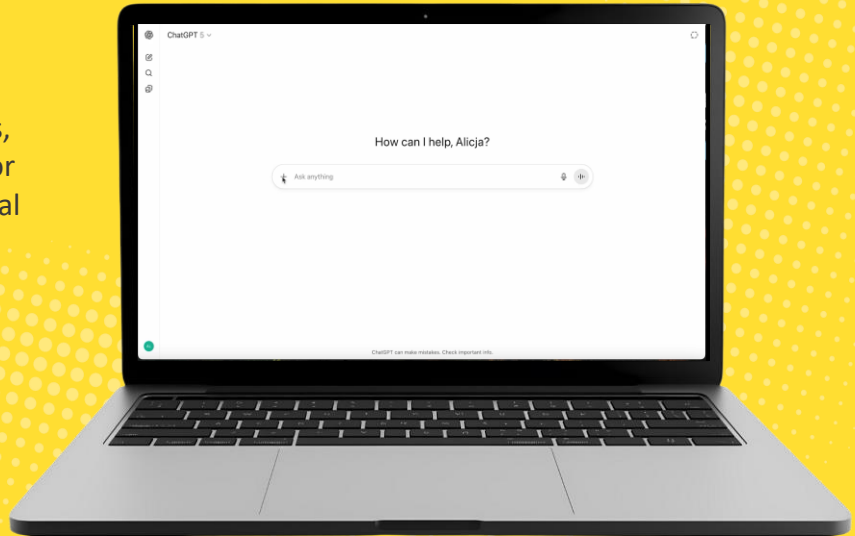
AI is making rapid inroads in meal planning

Used by more than one-quarter of Gen Z consumers

13%

of shoppers use AI tools, such as ChatGPT, Grok or Gemini to help with meal planning

- 27%** Gen Z
- 19%** Millennials
- 11%** Gen X
- 4%** Boomers



Video: Z10 Analytics

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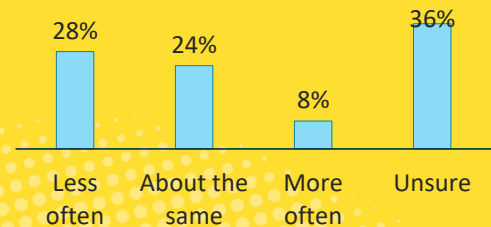
AI structurally under represents many categories

When asking AI why, it points the body of evidence online used as guidance

In charge of the grocery shopping list

- 69%** Myself (on paper, phone, app, etc.)
- 28%** Combined effort of household members
- 12%** AI input (ChatGPT, Gemini, Copilot, etc.)
- 10%** Meal-planning/subscription app
- 8%** Don't really use/make lists

AI vs. shopper's likelihood of listing baked treats like donuts, cookies, cupcakes, etc.



Q: Is there an AI bias to avoid baked treats/desserts when creating shopping lists?

A: Yes, there is a very real bias because the training data skews toward public-health guidelines that "added sugar = bad" narratives (similar for ChatGPT, Grok, Gemini, etc.)

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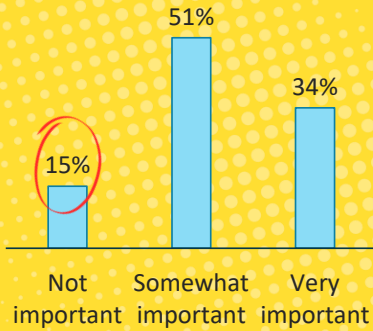
54

Younger consumers seek help

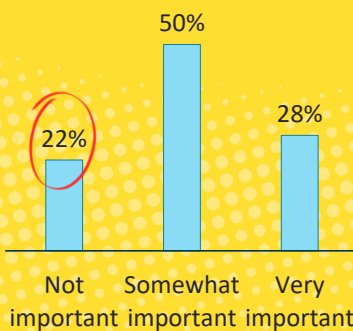
The need for speed is ever-present

Importance of time-saving shortcuts when preparing meals

Weekday meals



Weekend meals



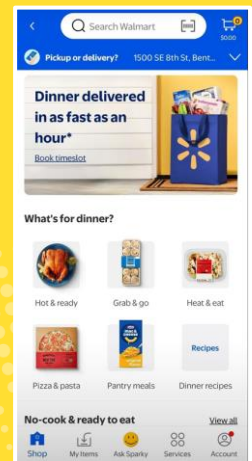
% very important (x%)

	Weekday	Weekend
Gen Z	42%	39%
Millennials	42%	34%
Gen X	36%	27%
Boomers	22%	18%

	Weekday	Weekend
Well-off	43%	41%
Struggling	24%	23%

Cross-merchandising can help save time

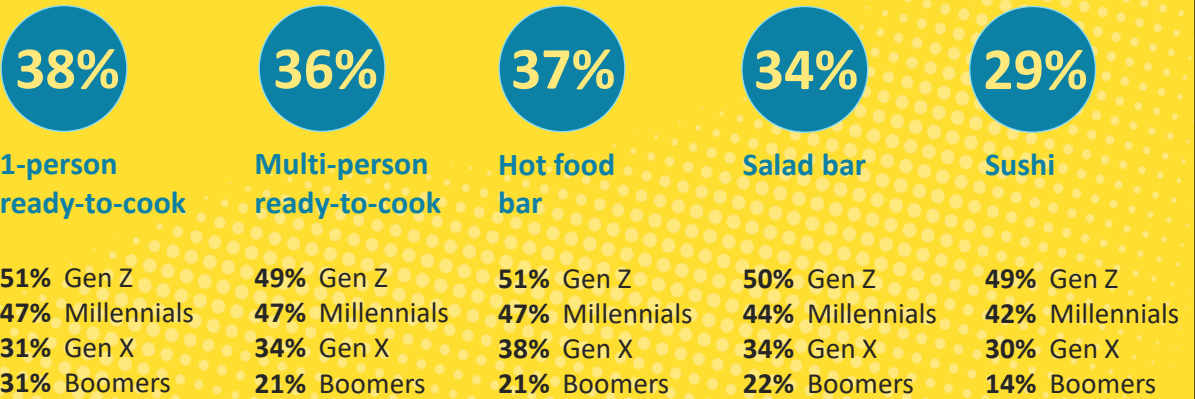
While inspiring trial and larger basket sizes



Meal interest shows future opportunities for deli

Different sizes, different formats, different cuisines

Interest by grocery deli prepared option (% somewhat or very interested)



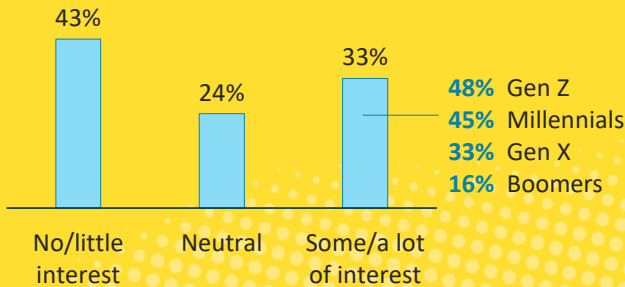
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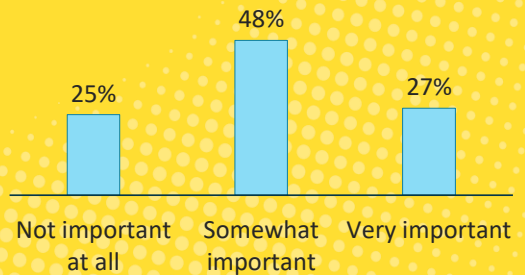
High interest in grocery deli prepared delivery

While the full-service counter has split importance

Interest in deli food delivery through 3rd party services such as DoorDash or Uber Eats



Importance of full-service counter for deli meat and cheese



Share of dollar sales generated by the full-service counter

Deli cheese: 15% in 2021 ▼ 11% L-52 weeks

Deli meat: 58.6% in 2021 ▼ 50.4% in L-52 weeks

Source: Circana, Integrated Fresh, Total U.S., MULO+, 52 weeks ending 4/19/2026

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Younger consumers love exploring new cuisines

They also want to see innovations more frequently

59%

of consumers love exploring new foods and cuisines

- 66% Gen Z
- 68% Millennials
- 58% Gen X
- 46% Boomers

- 64% Financially well-off
- 49% Financially pressured



Frequency of wanting to see new items and flavors in bakery/deli

- 19% Never, I buy what I buy
- 29% Seasonally
- 28% Monthly
- 18% Weekly
- 6% Daily

Top desired frequency:

- Gen Z: Monthly
- Millennials: Monthly
- Gen X: Seasonally
- Boomers: Seasonally

Pictures: 210 Analytics

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Unique and trendy ingredients resonate with Gen Z

Opportunity to leverage LTOs as a real-life focus group

Choice of a free pretzel bite sample

Regular



72%

Spicy dill pickle



28%

- 39% Gen Z
- 35% Millennials
- 21% Gen X
- 17% Boomers



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Highlight new and trending items in all areas

In-store displays, on the shelf, on-pack and in the ad



Pictures: 210 Analytics

Exploration is reflected in cuisine interest & sales growth

Some have population-wide interest; others have a large generational divide

Desired cuisine types in heat-and-eat/ready-to-eat deli foods

- 35% Pizza
- 34% Mexican/Latin American
- 32% Italian (pastas, lasagna, etc.)
- 30% BBQ/smokehouse
- 30% Sandwiches, subs, wraps, paninis, etc.
- 30% Chinese
- 28% Comfort/homestyle (mac & cheese, meatloaf, pot roast, etc.)
- 26% American (hot dogs, burgers, etc.)
- 26% Salads/salad bars
- 24% Breakfast/brunch (burritos, egg sandwiches, etc.)
- 22% Mediterranean
- 20% Japanese/Sushi
- 17% Thai
- 16% Korean
- 14% Indian
- 13% Hawaiian/poke
- 12% Middle Eastern
- 11% Vietnamese
- 10% Made-to-order boba tea and smoothies

Over-indexing cuisines by generation

Gen Z:	Millennials:
43% Pizza	41% Pizza
32% Sushi	39% Mexican
27% Korean	28% Sushi
22% Poke	22% Korean
16% Boba/bev.	18% Boba/bev.

Top unit growth categories:

- +7.0% Sushi
- +12.4% Chicken wings
- +10.6% American protein entrée
- +23.8% Seafood entrees
- +15.7% Italian deli sandwiches
- +8.0% Grilled chicken
- +55.4% Mexican entrees

Source: Circana, Integrated Fresh, Total U.S. 52 w.e. 4/19/2026
In order of unit sales

Being known for retail foodservice delivers

Six to seven in 10 shoppers will divert to different stores for a great deli

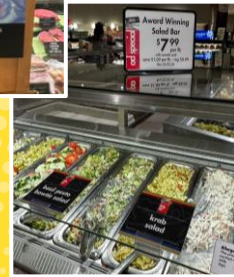
If a grocery store has a great deli prepared foods offering, can it prompt you to...?

57%

drive further than the closest store;
down from 63% in 2023

65%

go to a store where you don't typically
buy groceries; down from 70% in 2023



Pictures: 210 Analytics

Discovery spans online and in-store sources

Social media tops among Gen Z

Discovering new foods in the past year

- 36% In-store
- 35% YouTube
- 34% Facebook
- 34% Friends and family showing me
- 26% Instagram
- 25% TikTok
- 15% Online (ads, subscription boxes, etc.)
- 15% Ads on TV/streaming
- 9% Influencers
- 8% Specialty store
- 8% Other social media platforms
- 5% Instacart, GoPuff, Shipt, etc. ads



Pictures: 210 Analytics



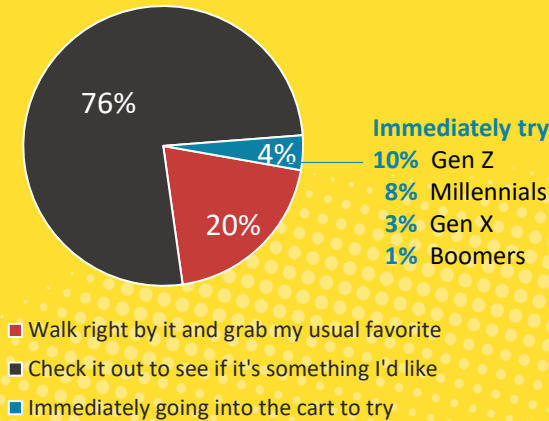
Discovery by generation

- Gen Z**
- 56% YouTube
- 52% TikTok
- Millennials**
- 44% YouTube
- 40% Instagram
- Gen X**
- 41% Facebook
- 36% In-store
- Boomers**
- 45% In-store
- 39% Friends & family

Sampling is the top purchase vehicle

Especially when supported by special promotions

Reaction when seeing something new in-store



Most effective ways to prompt a purchase

- 59% Sampling
- 35% On promotion/special intro price
- 22% Familiar flavors/textures
- 20% Nutrition/Better-for-you claim
- 17% Unique or unusual flavor combination
- 13% LTO or available for a short time only
- 12% A viral trend on social media
- 6% Inspiring description
- 5% Beautiful or interesting packaging

Seasonal and functional draw eyes

Surprise and delight and nostalgia are strong mid-tier themes

Innovations prompting the most excitement for trial

- 34% Seasonal items
- 28% Foods with functional benefits or better-for-you properties
- 27% Unexpected new flavor combos
- 23% Nostalgic or retro foods
- 18% Premium/indulgent foods
- 15% Global flavors/products
- 15% Store brand version
- 14% New textures (crunchy, layered, combinations, etc.)
- 6% None of these



Top innovation for trial

Gen Z
Unexpected combos
Functional benefits

Millennials
Seasonal items
Unexpected combos

Gen X
Functional benefits
Seasonal items

Boomers
Seasonal items
Functional benefits



Gen Z loves viral fame and pop culture moments

Activate TikTok fame, TV shows, K-pop, but also nostalgia in-store



The Pursuit of Better

Consumers balance dietary, lifestyle and budget priorities, resulting in a growing focus on protein, whole foods and functional benefits. Time-saving solutions resonate with younger consumers, while sustainability remains an opportunity for clearer communications and transparency.



The evolved definition of health is holding

Emotional wellbeing and physical health are interconnected

Physical health and emotional wellbeing (happiness) are interwoven (% of consumers):



Pictures: 210 Analytics

Reflect this continuum in dairy, deli and bakery

From functional benefits to decadent indulgence



Pictures: 210 Analytics

Balance is the word du jour

With treating playing an important role in traditions and happiness

88%

agree that it is completely fine to occasionally enjoy some treats like cupcakes, cookies or ice cream

80% Gen Z
93% Boomers

89%

baked treats, like cakes or pies, are great traditions during holidays and celebrations



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60% follow some type of lifestyle diet

Protein reigns supreme among specific diet types



General/balanced approach

- 40%** No particular way of eating
- 28%** Balanced diet

Type

- 12%** Intermittent fasting
- 9%** Diet to manage/avoid health condition
- 5%** WW, Jenny Craig or other diet plans

Ingredient/production method

- 18%** High protein/athletic performance/carnivore
- 17%** Tracking calories or macros
- 16%** Tracking sodium/salt
- 12%** Organic/clean eating
- 10%** Tracking fat/saturated fat
- 10%** Low/no carb diets, incl. Keto
- 7%** Gluten-free
- 6%** Vegetarian/vegan
- 3%** Kosher

Top diet by generation:

- Gen Z: High protein
- Millennials: High protein
- Gen X: Balance
- Boomers: Balance

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Protein is popping up everywhere

Opportunity for “more is more” in selling incremental units



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Rising opportunity in protein snacking

Prominent trend in restaurant foodservice

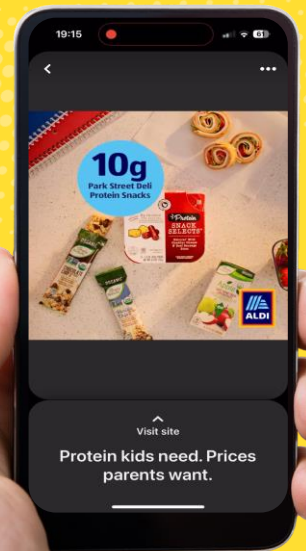
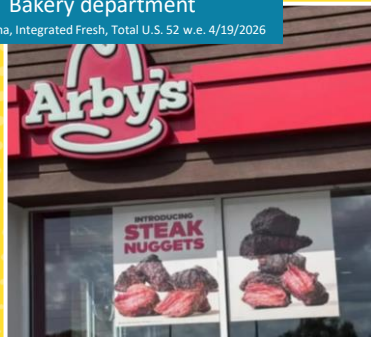
Protein claim unit growth:

+27.5% Deli department

+2.2% Dairy department

+80.4% Bakery department

Source: Circana, Integrated Fresh, Total U.S. 52 w.e. 4/19/2026



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Pictures: 210 Analytics

GLP-1 is altering demand patterns

Smaller portions can address price, 1-person households and now GLP-1

15.1%

share of the U.S. population currently using GLP-1 medications, such as Ozempic, Wegovy and Mounjaro

Higher GLP-1 usage:

- Women
- Millennials (ages 35-45)
- Children in household
- Urban areas
- Higher-income

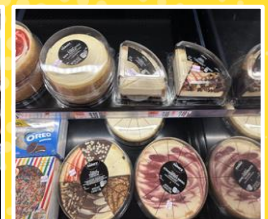


General food and beverage behaviors

- Reduced appetite
- Focus on smaller portion sizes
- Greater focus on:
 - Protein
 - Nutrient density
 - Satiety
- Fewer impulse and indulgent eating occasions
- Rarely eliminating foods, but eating less and being more intentional when eating

GLP-1 friendly positioning is an opportunity

Nutrient density, protein and fiber take a lead role



Fortification is driving growth

High-scoring health benefits reflect physical and emotional health

79%

like fortified foods enriched with micronutrients to bring added health benefits



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Thinking about fortified foods or beverages, which health benefits are of interest?

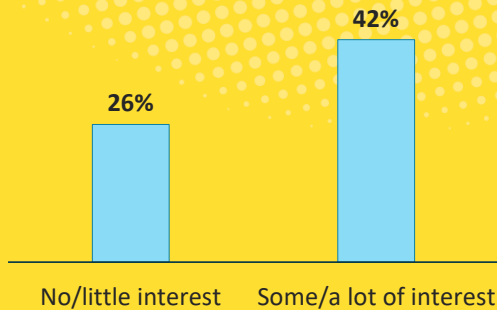
- 42% General wellness
- 36% Energy
- 36% Weight management
- 30% Gut/digestive health
- 29% Stress relief
- 28% Bone/joint health
- 28% Sleep/rest support
- 26% Cardiovascular health
- 24% Inflammation
- 23% Skin/hair/beauty support
- 22% Supplement deficiencies (iron, vitamins, etc.)
- 22% Cognitive function/brain health
- 22% Longevity
- 21% Immunity building
- 20% Build/maintain muscle

77

Opportunity in lifestyle stations

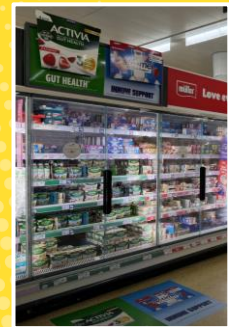
Lifestyle sets can lead to experimentation

Interest in special sections that group items by diet, lifestyle or health goal, such as high-protein or immunity support



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Tie the feature to the benefit for optimal impact

For instance... Vitamin B12 helps restore tiredness and fatigue

Best way to display nutrition information on a food package, using protein as an example

- 38% Excellent source of protein
- 30% # gram of protein
- 19% Excellent source of protein to build and maintain muscle
- 13% # gram of protein to build and maintain muscle



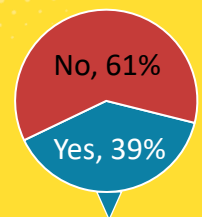
Natural colors are important, but there's a bit of time

Half say it would be nice to phase out artificial colors in the next few years

Importance of baked goods, dairy and prepared foods being made without artificial colors?

- 18% Not important, artificial colors don't affect my choices
- 52% Would be nice to phase out artificial colors during the next few years
- 30% Extremely important, I actively look for and avoid artificial colors

Stopped purchasing any foods because they contain artificial colors

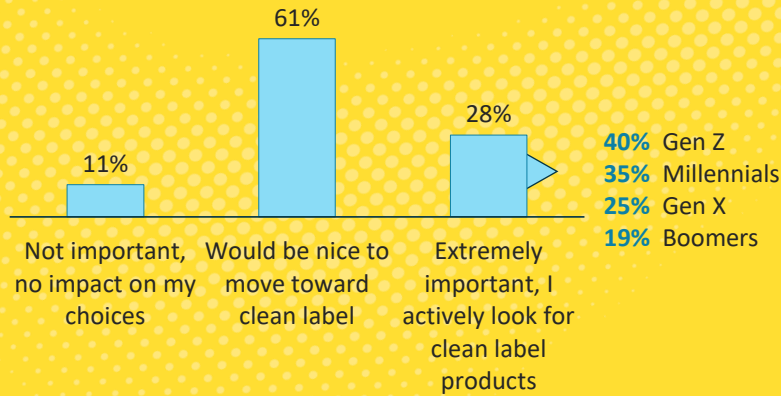


- 50% Gen Z
- 46% Millennials
- 38% Gen X
- 27% Boomers

Clean label is likely to rise in importance

Experimentation is already occurring

Interest in baked goods, dairy and prepared foods being made with simple and as few ingredients as possible (“clean label”)



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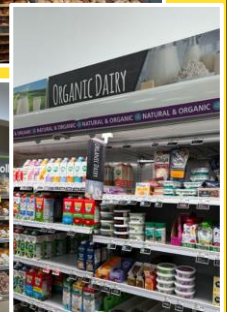
Pictures: 210 Analytics

Consumer definition of less processed

Big focus on natural, simple and fewer ingredients

Traits of a less processed baked good, dairy or prepared food item

- 42% No preservatives
- 41% Natural (no artificial) colors and flavors
- 41% No artificial sweeteners
- 39% No high-fructose corn syrup or sugar alcohols
- 36% Recognizable ingredients
- 34% Shorter ingredient list
- 34% Natural sweeteners (honey, dates, etc.)
- 28% Organic ingredients
- 26% Non-GMO verified
- 25% No palm oil/hydrogenated oils
- 14% No emulsifiers
- 13% Made by craft/artisan brand



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15% heavily weighs the planet into purchases

Younger generations are more likely to have a strong focus

29%

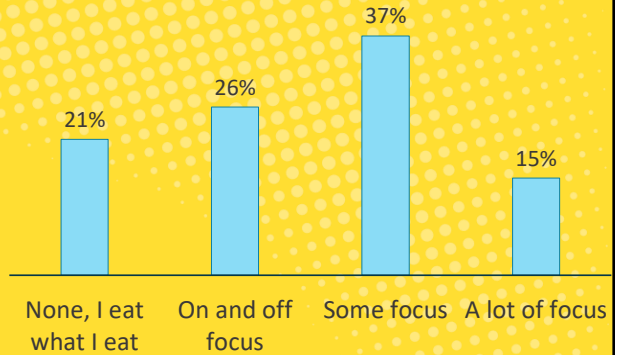
of consumers have stopped purchasing 1+ brands or products because of sustainability-related concerns in the past year

% A lot of focus

- Gen Z: 19%
- Millennials: 21%
- Gen X: 15%
- Boomers: 7%
- Low income: 14%
- High income: 22%



Level of focus on making sustainable food and beverage choices with an eye on the planet



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Room for improving food and package waste

Retailers are equally focused on limiting food waste

In your household, how much of an issue is..?

	No issue at all	Somewhat of an issue	Substantial issue
Food going bad before you could eat it	28%	47%	25%
Packaged food being sold in too big quantities	39%	45%	17%
Package waste not being eligible for recycling	36%	45%	19%



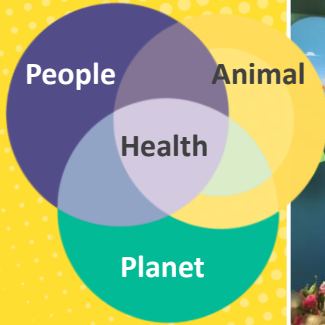
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Purchase priorities reflect all areas of sustainability

Animal and community are among the highest purchase priorities



Pictures: 210 Analytics

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Animal welfare matters in dairy and deli

Far greater level of care among Gen Z and Millennials

Purchase influence on the food and beverages you buy

37%

of consumers say humane treatment of animals for deli meat or dairy products is a purchase priority

35% A tiebreaker at best
28% No influence



Pictures: 210 Analytics



Produktmerkmale	Bio Natur Bio		Produktionsformer	
	MAKEL 3.000	INTELLIGENT	MAKEL 3.000	INTELLIGENT
Hersteller	MAKEL 3.000	INTELLIGENT	MAKEL 3.000	INTELLIGENT
Gen-100: stabil	✓	✓	✓	✓
Angebot für vegetarier	✓	✓	✓	+
Wasser	✓	✓	✓	✓
Produkt nach modernem	✓	✓	✓	✓
Schärfegrad	✓	✓	✓	✓
Ökolog	✓	✓	✓	✓
Gen-100: stabil	✓	✓	✓	✓
Abwechslung	+	+	+	+

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Being part of the community is key

Fair pay and policies and giving back are in our DNA and on the Gen Z radar

Purchase influence on the food and beverages you buy

27%

of consumers say stores or brands giving back to the community is a purchase priority

39% A tiebreaker at best
34% No influence

31%

of consumers say fair pay and treatment of workers is a purchase priority

37% A tiebreaker at best
32% No influence



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Environmental sustainability zeroes in on packaging

Gen Z and Millennials are far more aware of carbon footprint terminology

Purchase influence on the food and beverages you buy

25%

of consumers say sustainable packaging in dairy, deli and bakery is a purchase priority

40% A tiebreaker at best
35% No influence

20%

of consumers say carbon footprint data or certification is a purchase priority

37% A tiebreaker at best
43% No influence



Pictures: 210 Analytics



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Transparency is the currency of trust

A prime role for the package label, but limited real estate

91%

of consumers have an interest in learning more about the how, where, when and by whom the food they buy is produced



Learning about the how, where and by whom the food you buy is produced

57% Info on the package label

33% Signage in the store

32% Info on the brand's website/app

31% Info on the store's website/app

27% YouTube, Facebook or other social media

25% On-pack QR code

26% Information in the weekly ad/circular

15% Meet-the-maker events in the store

Winning in today's ever-changing world


1. **Financial pressure** has few consumers eliminating categories, but many recalibrating spending across types, cuts, brands and stores.
2. **The demographic tidal wave** is impacting meal and channel choices, with Millennials likely to be the top spender in 2-3 years.
3. **Health has become a major sales driver** with room for pure indulgence alongside a functional focus, including protein, GLP-1s, whole food and MAHA.
4. Continue to educate and provide choice in areas including **animal welfare** and **environmental sustainability**, which are likely to gain in importance.
5. Celebrate **TASTE**: help consumers create permissible, safe, nutritious and delicious baked treats and meals that have them coming back for more.

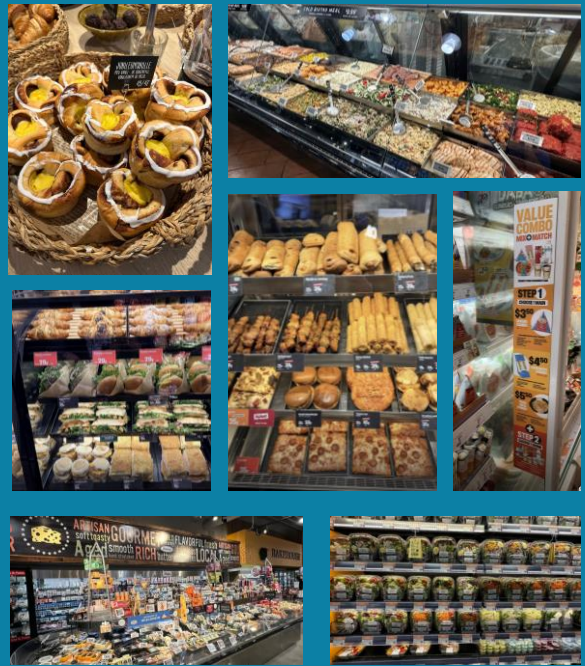
Download all resources on the conference app

For questions or additional info:
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- M: 502.552.5840
- Find me on **LinkedIn**

thank you!

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