SMART TECH, SMARTER SUPPLY

CHICKEN MARKETING SUMMIT

July 28-30, 2025

DeSoto Savannah
Savannah, Georgia

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Research Conducted By — Circana.

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Agenda

1. Macro Snapshot
2. Protein Perceptions
3. Tech Tendencies: Online & Digital
4. Tech Tendencies: AI & AI Adjacent

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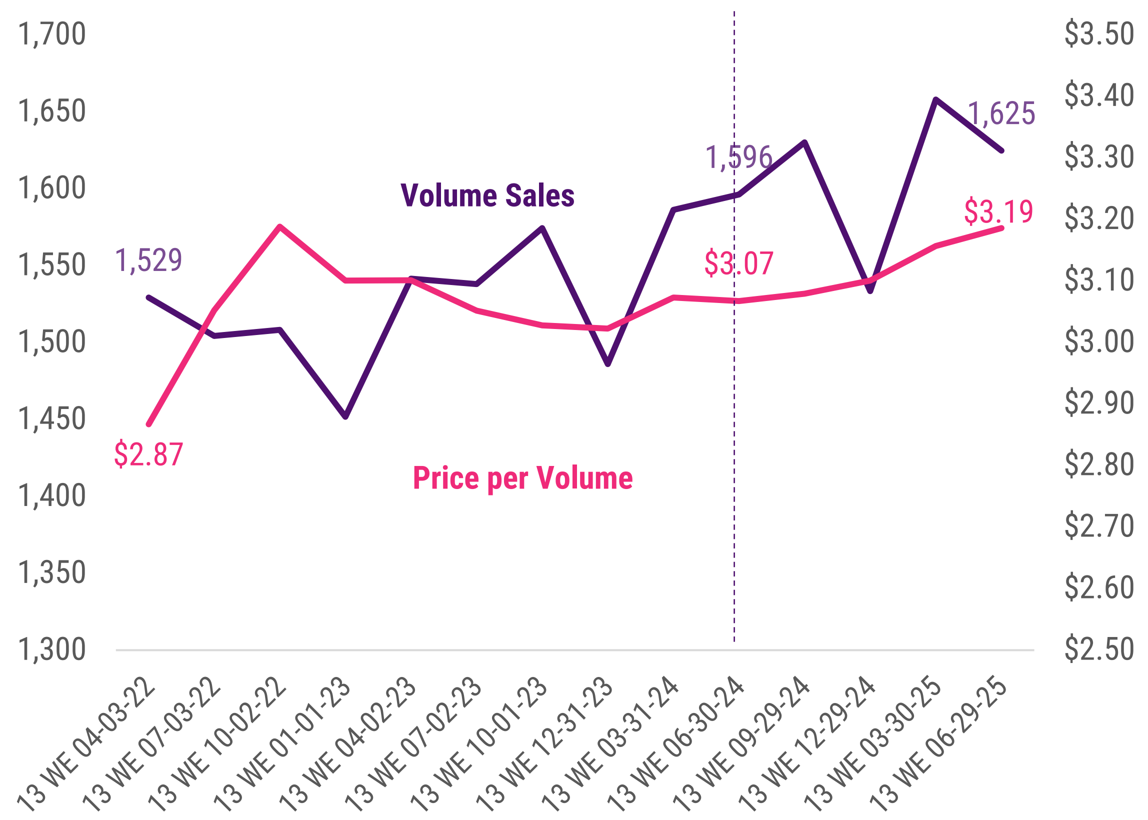
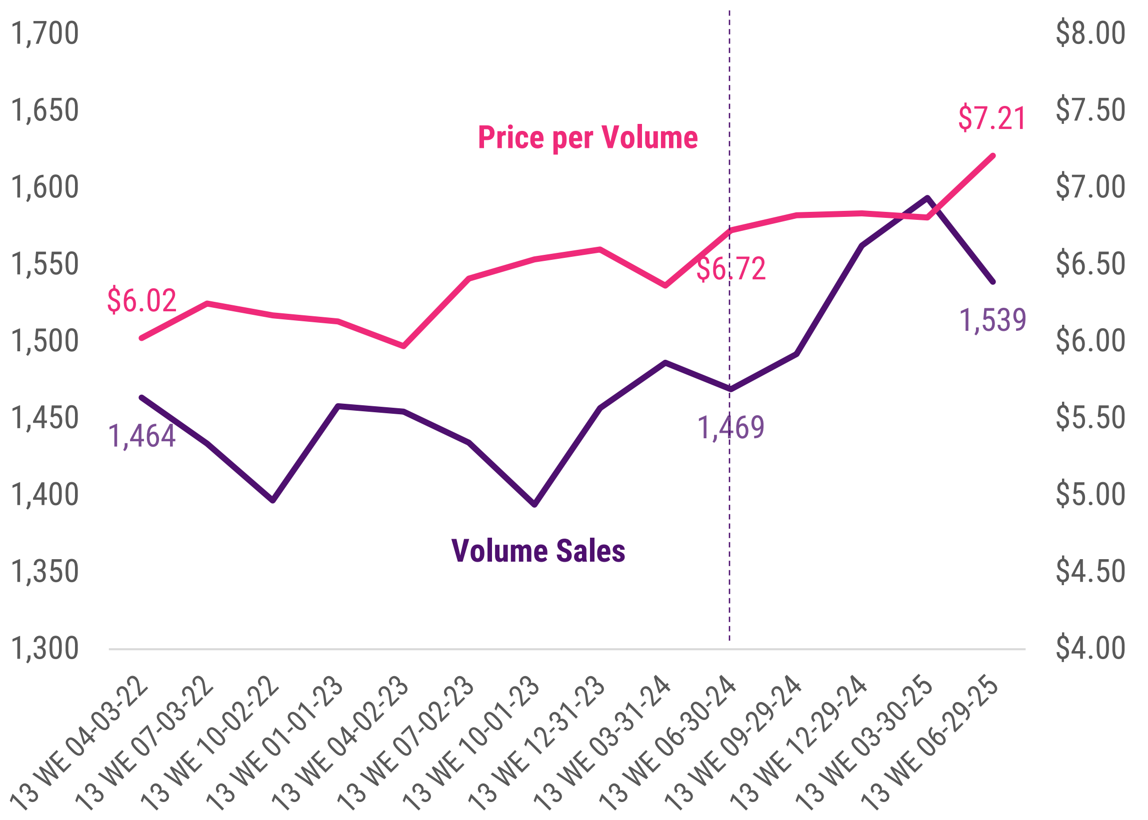
Macro Snapshot

Chicken prices settled in plus $3 territory with no negative impact to sales. Gap with beef is increasing.

Chicken
Volume (in MM pounds) vs. Price Per Volume



Beef
Volume (in MM pounds) vs. Price Per Volume



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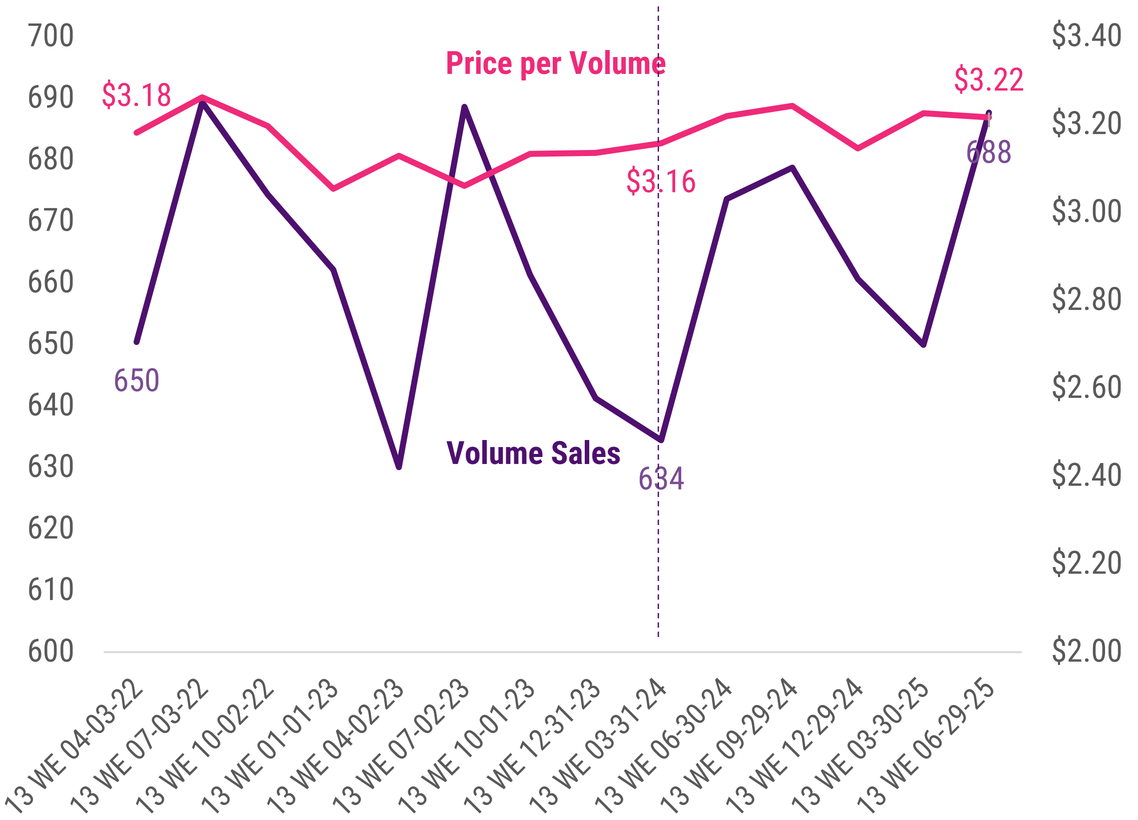
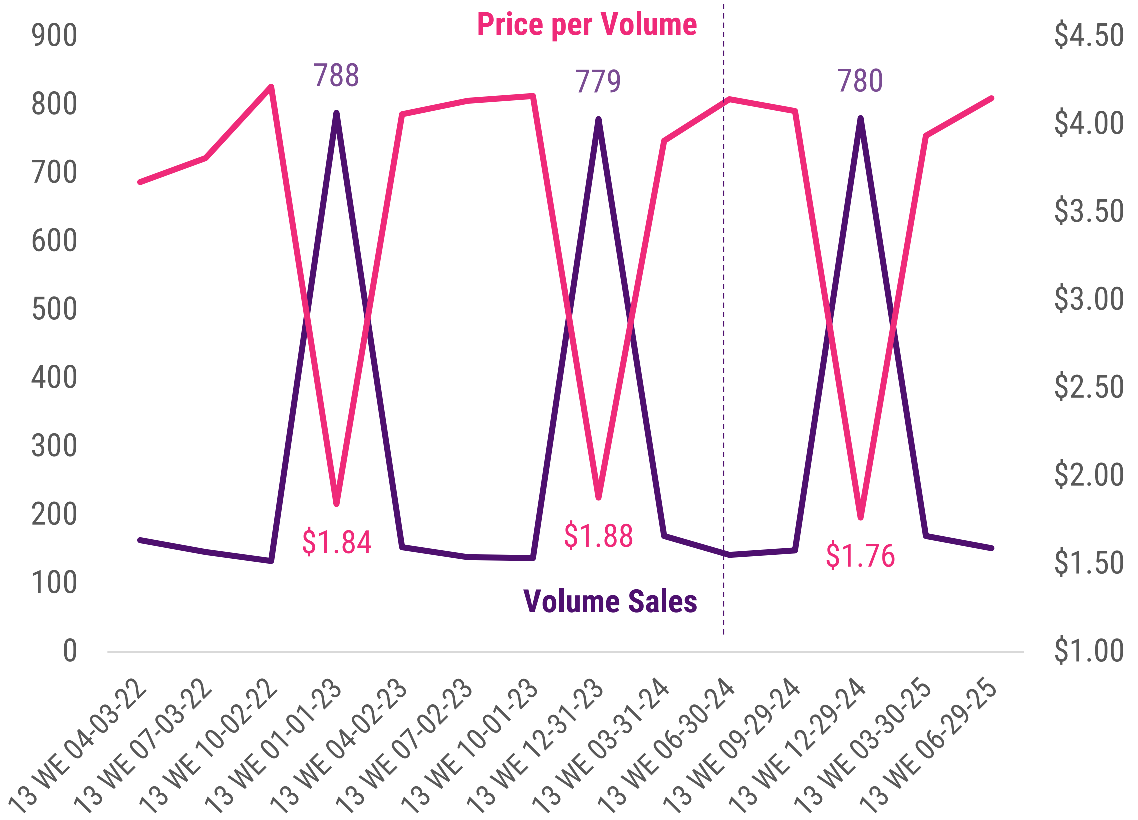
Circana Integrated Fresh MA Database – 1/1/2022 – 6/29/2025

Pork prices remained stable around $3.20 w/o notable volume increase. Turkey (peak quarters) performance was similar.

Pork
Volume (in MM pounds) vs. Price Per Volume



Turkey
Volume (in MM pounds) vs. Price Per Volume



Circana Integrated Fresh MA Database – 1/1/2022 – 6/29/2025

Beef YoY dollar sales growth led all proteins across generations. Chicken (unlike last year) was a consistent second.





	All HH Generation	Gen Z & Younger Millennials (1988-1997)	Millennials-Older (Born 1981-1989)	Generation X (Born 1965-1980)	Boomers (Born 1946-1964)	Seniors and Retirees (Born 1925-1945)
BEEF	13.3	21.9	15.7	11.8	11.2	4.1
CHICKEN	9.4	16.8	10.3	7.4	7.5	1.5
PORK	5.6	10.5	8.7	3.1	5.9	-2.6
TURKEY	0.2	5.2	5.6	-2.9	-0.4	-2.1

LEADS ALL FRESH PROTEINS

Circana Integrated Panel Database – 52 Weeks Ending 6-29-2025

The year 2030 marks a turning point for the U.S. population

HALF of All Americans will be Millennials, Gen Z & Younger

These shoppers have lived in a world with the **internet, online shopping, smart phones and Mass / Supercenters and Club stores selling fresh groceries** –

They are multi-cultural, diverse and much more open to new solutions.

Future-proof your fresh.

Source: 2030 population projection from www.census.gov

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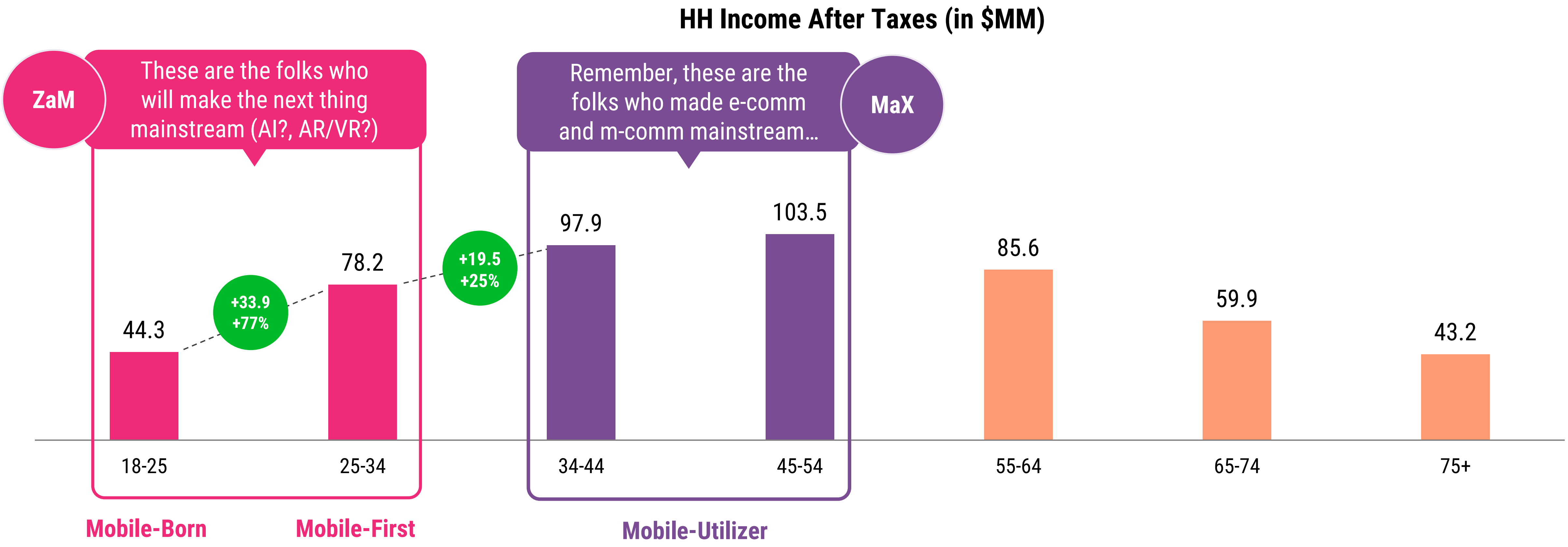
The two youngest groups are set to increase their income the most in the next 10 years

They are the folks who will make the next thing mainstream.



Consumer Expenditure Surveys, U.S. Bureau of Labor Statistics, September 2022

The Consumer Speaks

Survey Methodology

Survey Sample

N= 625 Raw Chicken Buyers

Gen Z to Younger Boomers

Age 18-67

Custom survey

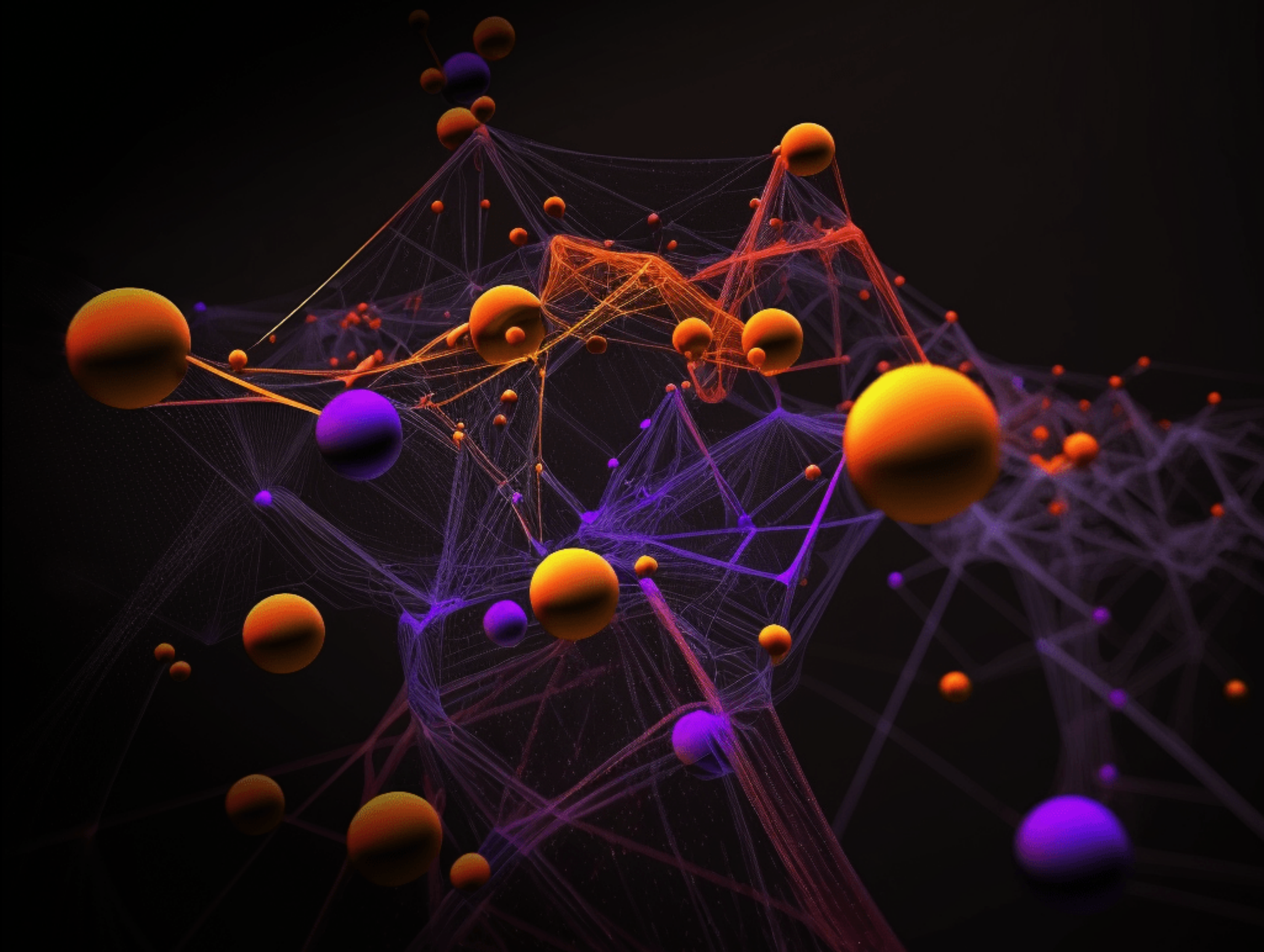
- Online survey
- Fielded June 2025

GEN Z: Under 27	n=110
Younger Millennial: Ages 27-33	n=129
Older Millennial: Ages 34-42	n=131
GEN X: Ages 43-58	n=139
Younger Boomers: Ages 59-67	n=116

Research Goal:

To better understand how shoppers are using technology to choose, order, and enjoy chicken, along with their reactions to emerging trends that improve convenience and satisfaction. The focus is on comparing and contrasting response by generational cohorts, to uncover key differences in perceptions and attitudes.

Protein Perceptions



Companies that can **reduce stress** for younger consumers will be on the winning side of the business

Stress in America – American Psychology Association, 2023

STRESS is the number one health concern among Millennials & Gen Z

60% I am often stressed, anxious or worried
+25 pts. vs. those aged 40+

24% The foods I eat affect my mood / emotions
+10 pts. vs. those aged 40+

Circana, Top Trends in Fresh, May 2023

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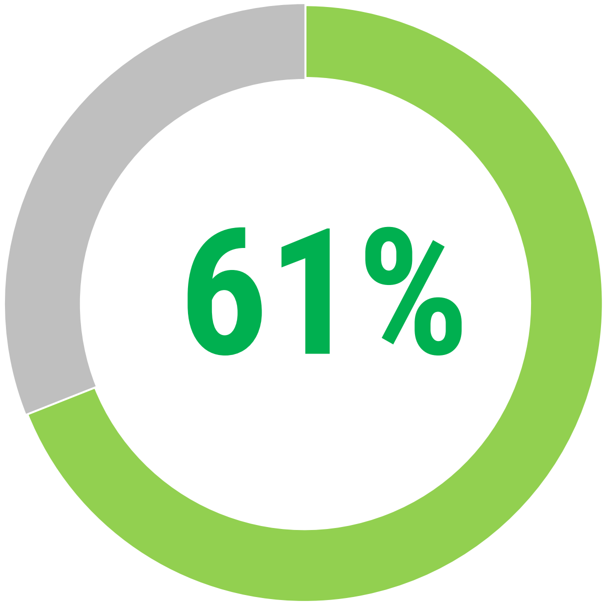
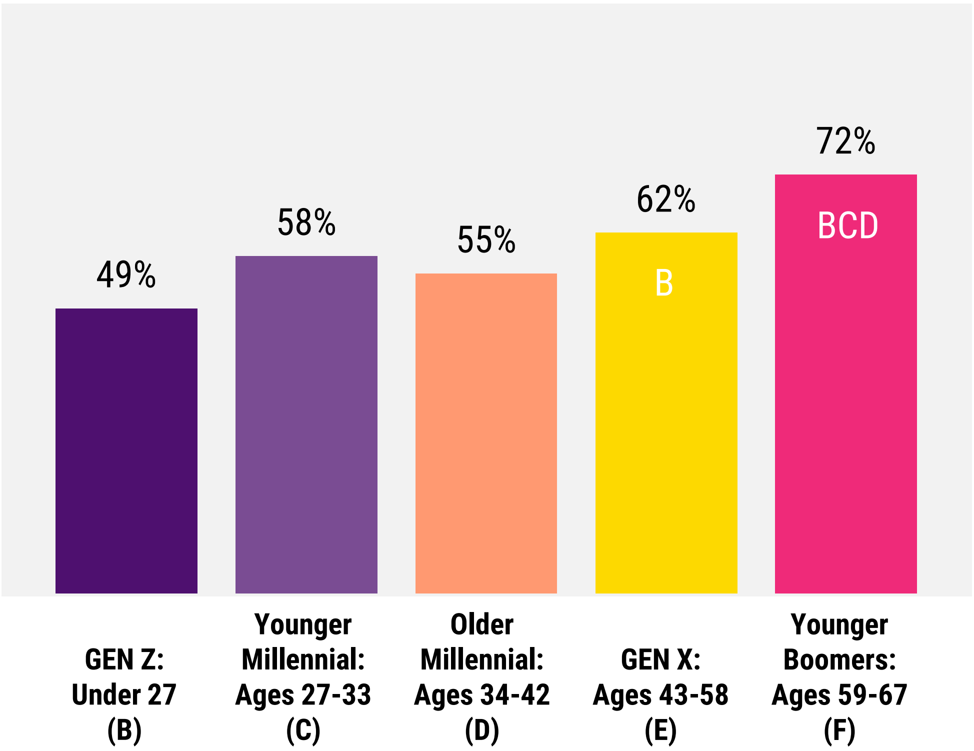
There’s a need to reinforce protein quality for younger consumers

Most agree fresh is the best source of protein, especially GenX and older



Agree fresh meat is the best source of whole protein



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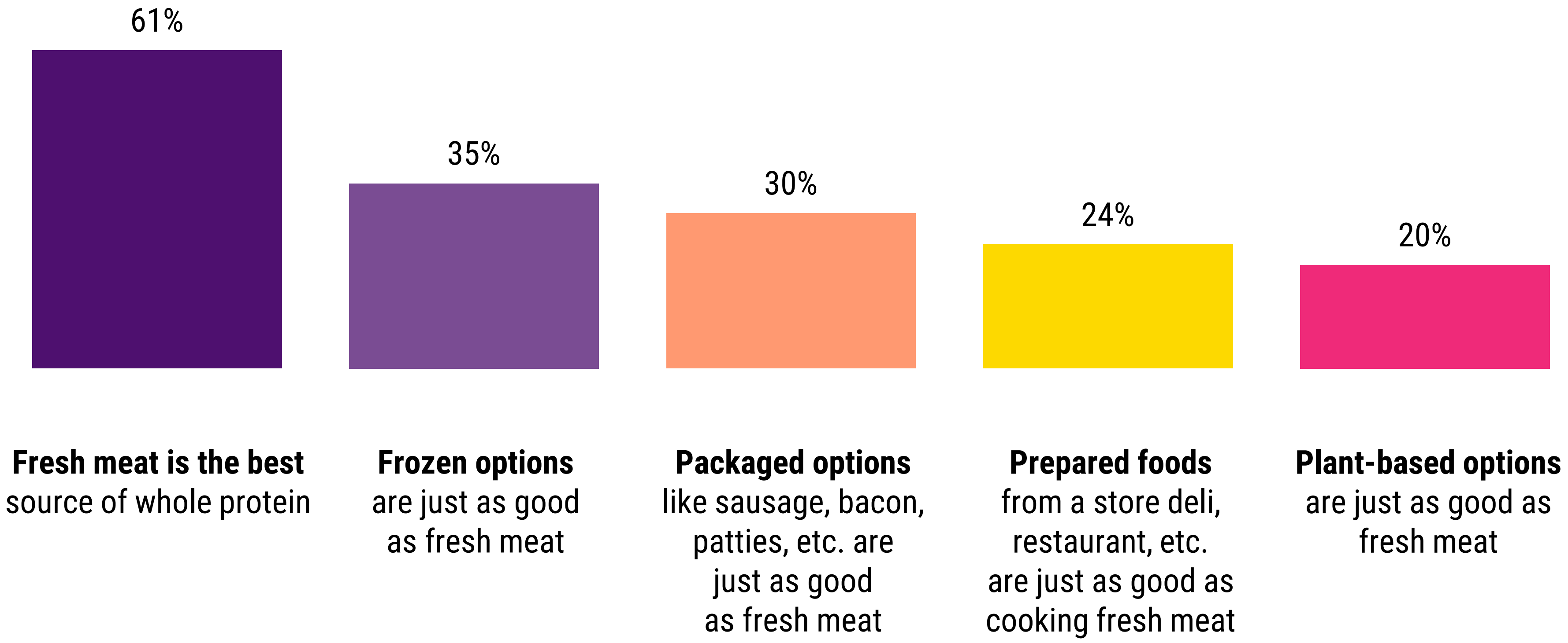
B/C/D/E/F indicate significant differences at 90% confidence level.
Q11: Which of the following statements do you strongly agree with when it comes to protein?

Fresh is regarded the best protein option

When it comes to protein, frozen and packaged options garner half the favorability of fresh.

When it comes to protein…



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B/C/D/E/F indicate significant differences at 90% confidence level.
Q11: Which of the following statements do you strongly agree with when it comes to protein?

Caution: fewer younger consumers consider fresh to be superior.

Younger cohorts are more receptive to prepared foods and plant-based options.

When it comes to protein…	GEN Z: Under 27 (B)	Younger Millennial: Ages 27-33 (C)	Older Millennial: Ages 34-42 (D)	GEN X: Ages 43-58 (E)	Younger Boomers: Ages 59-67 (F)
Fresh meat (e.g., chicken, beef, fish, etc.) is the best source of whole protein	49%	58%	55%	**62% B**	**72% BCD**
Frozen options (e.g., frozen chicken, beef, fish, etc.) are just as good as fresh meat	39%	37%	**43% E**	29%	35%
Packaged options like sausage, bacon, patties, etc. are just as good as fresh meat	35%	34%	32%	27%	26%
Prepared foods from a store deli, restaurant, etc. are just as good as cooking fresh meat	**35% CEF**	24%	**30% EF**	20%	21%
Plant-based options are just as good as fresh meat	**30% DEF**	**25% F**	20%	18%	15%

B/C/D/E/F indicate significant differences at 90% confidence level.
Q11: Which of the following statements do you strongly agree with when it comes to protein?

Further, packaged protein snacks are more sought-after among younger cohorts.

	GEN Z: Under 27 (B)	Younger Millennial: Ages 27-33 (C)	Older Millennial: Ages 34-42 (D)	GEN X: Ages 43-58 (E)	Younger Boomers: Ages 59-67 (F)
I seek out **packaged food or snack options** with high protein content	**29% F**	**26% F**	**24% F**	22%	15%
Packaged snacks containing protein (e.g., meat sticks, protein chips, protein popcorn, etc.) are a great way to add protein into my diet	27%	**34% F**	29%	27%	22%
I'm noticing **new packaged snack options** with high protein content when shopping	21%	**21% F**	**23% F**	**23% F**	13%

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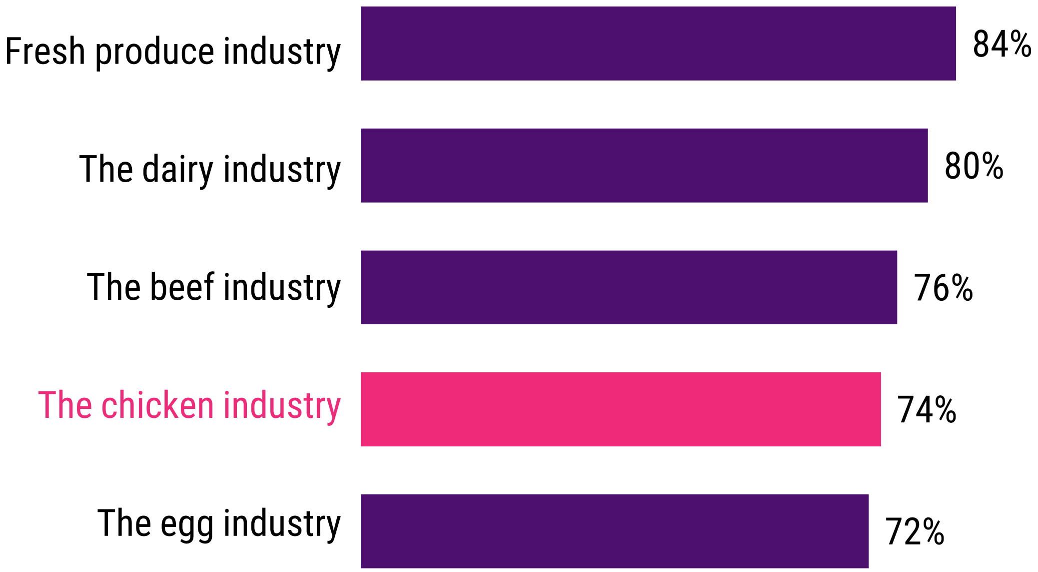
B/C/D/E/F indicate significant differences at 90% confidence level.
Q11: Which of the following statements do you strongly agree with when it comes to protein?

There is work to do in growing stronger trust for fresh as a whole.

There is room for fresh chicken to close the gap to other industries, especially among older consumers.

"Trust completely/somewhat"



	GEN Z: UNDER 27 (B)	YOUNGER MILLENNIAL: AGES 27-33 (C)	OLDER MILLENNIAL: AGES 34-42 (D)	GEN X: AGES 43-58 (E)	YOUNGER BOOMERS: AGES 59-67 (F)
Fresh produce industry	84%	78%	87% C	85%	87% C
The dairy industry	71%	75%	83% B	81% B	85% BC
The beef industry	71%	74%	79%	77%	76%
The chicken industry	70%	70%	77%	75%	74%
The egg industry	67%	78% BE	75%	68%	71%

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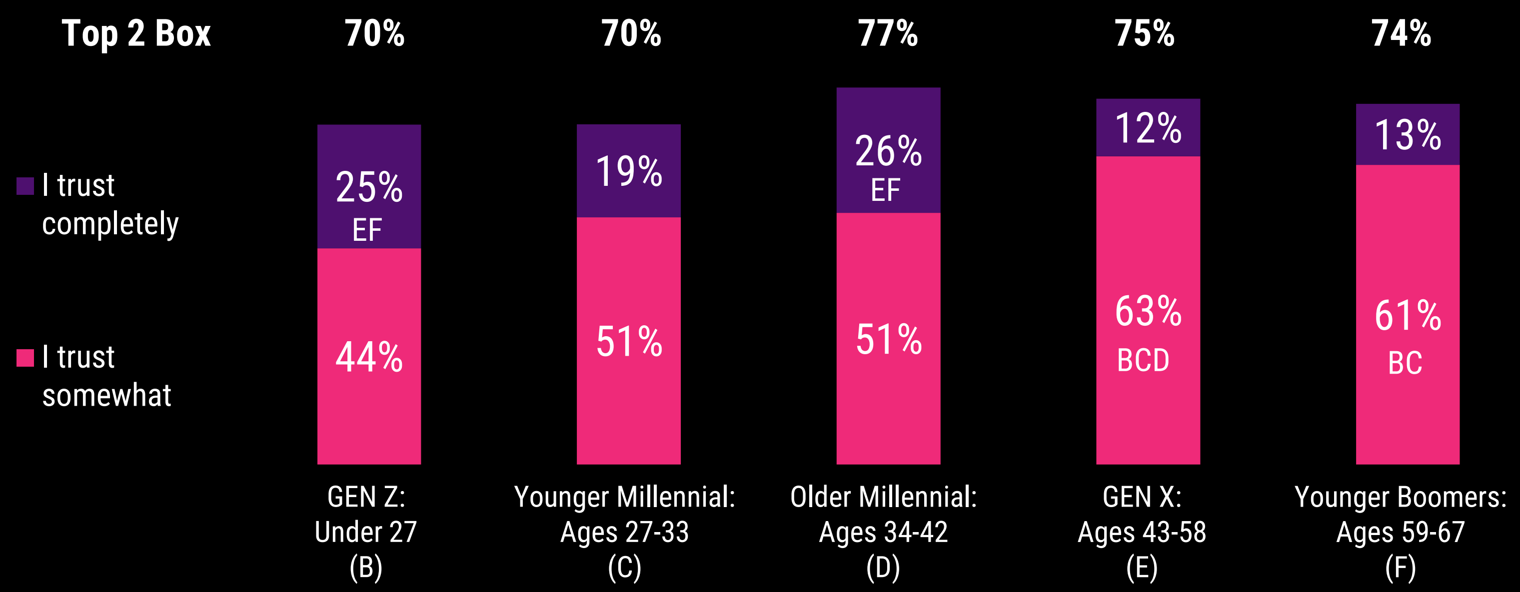
B/C/D/E/F indicate significant differences at 90% confidence level.
Q12: When it comes to food quality and safety, what is your level of trust with...?

Younger cohorts have stronger trust in fresh chicken, though only among a quarter or less.

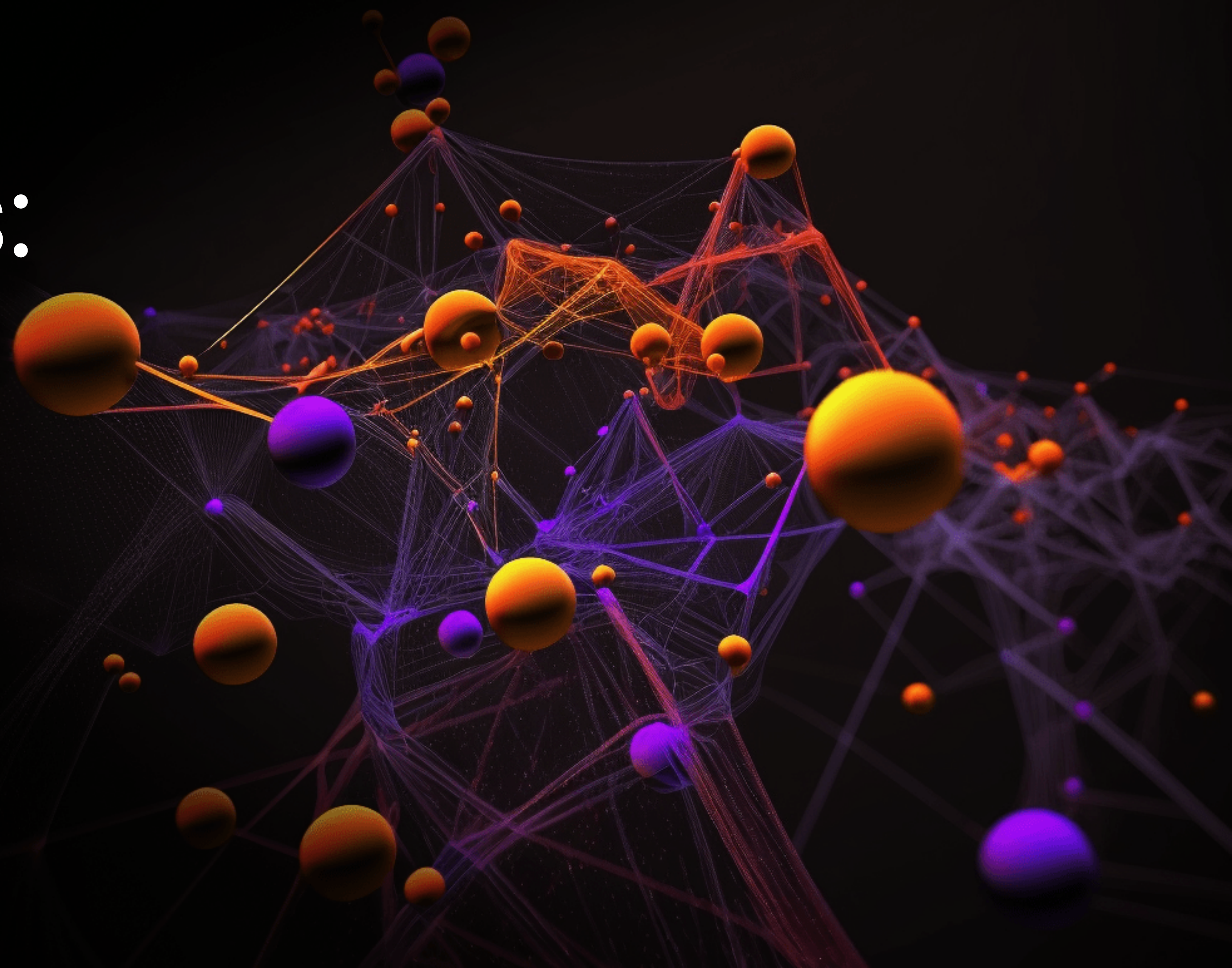
Level of Trust with the Chicken Industry



B/C/D/E/F indicate significant differences at 90% confidence level.

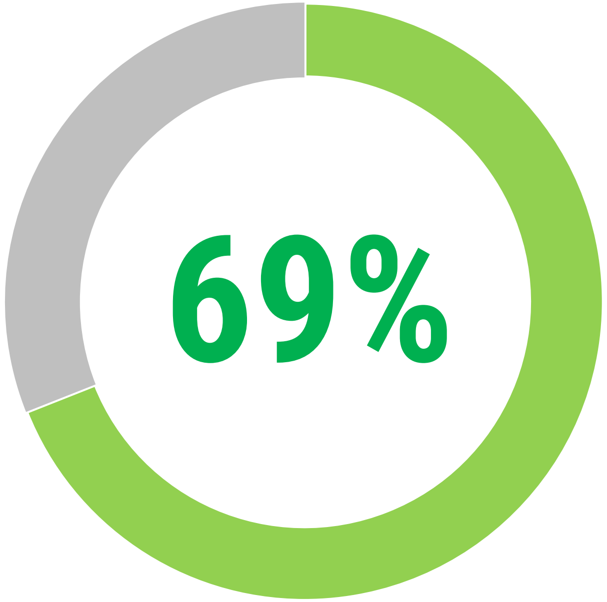
Q12: When it comes to food quality and safety, what is your level of trust with...?

Tech Tendencies: On-Line & Digital

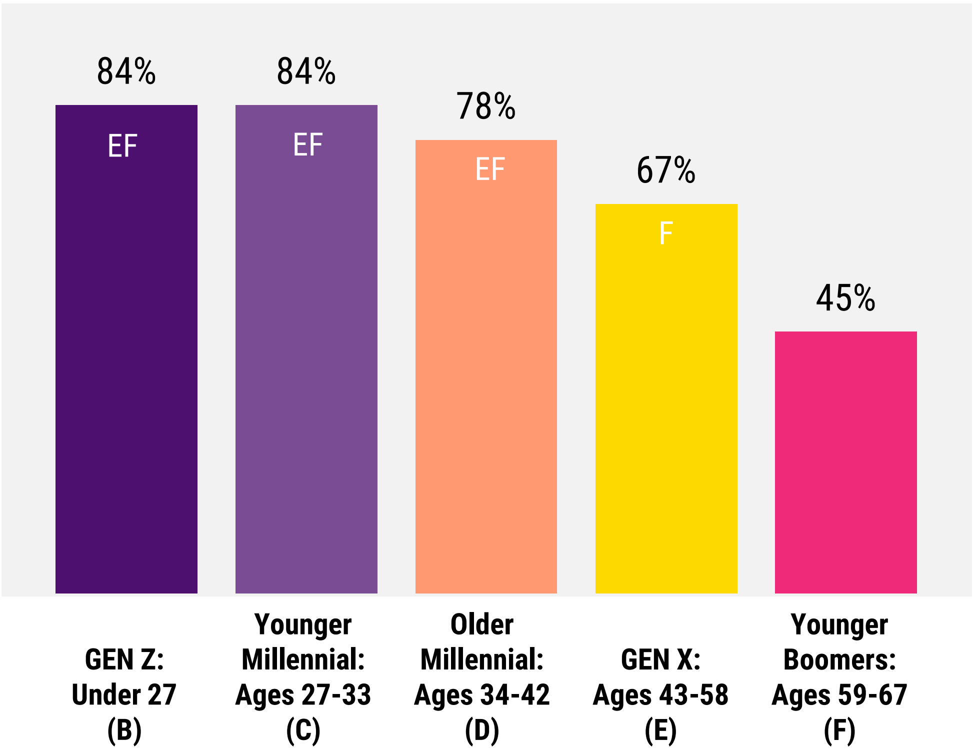


Keeping pace with digital shopping advancements is a must for fresh items.

7 out of 10 are buying groceries online. Younger cohorts are leading the way.



Purchase groceries online or via a mobile app for pickup or delivery



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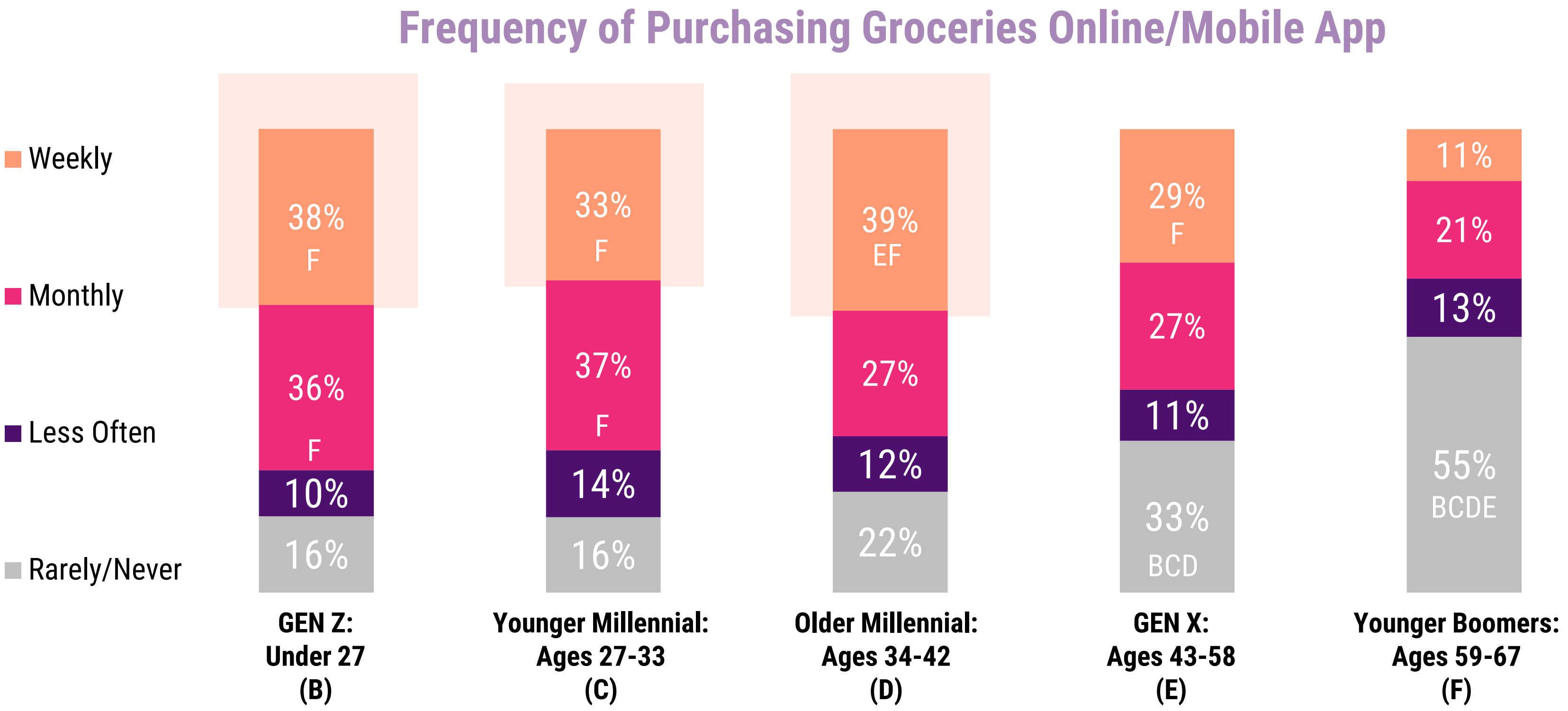
B/C/D/E/F indicate significant differences at 90% confidence level.
Q2: How often do you purchase groceries online or via a mobile app for pickup or delivery? Your best estimate is fine.

There's opportunity to leverage high frequency of online shopping to reach younger buyers.

Over a third of younger cohorts are buying groceries online on a weekly basis or more often.



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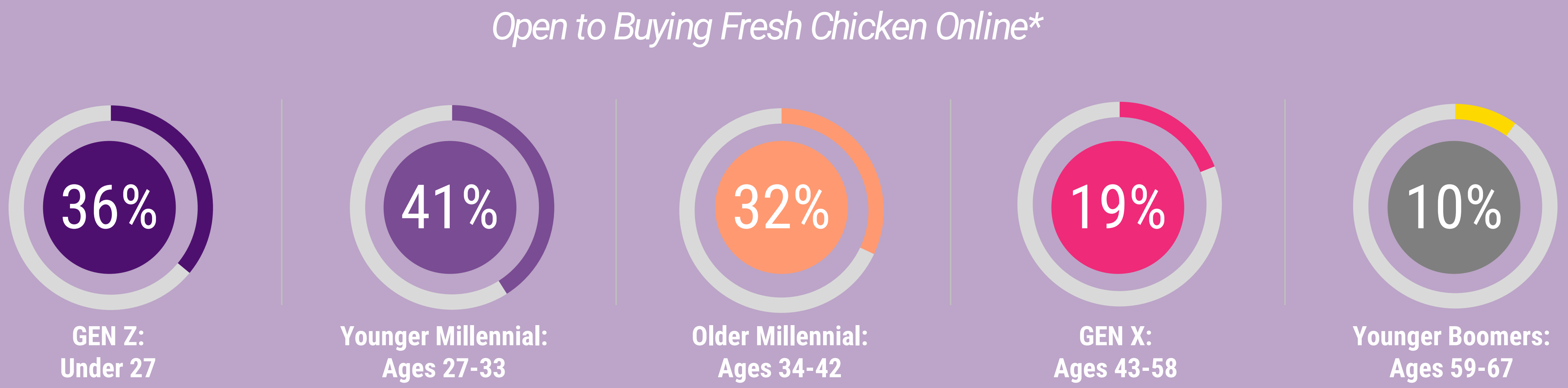
B/C/D/E/F indicate significant differences at 90% confidence level.

Q2: How often do you purchase groceries online or via a mobile app for pickup or delivery? Your best estimate is fine.

Barriers to buying fresh chicken online are diminishing by age.

More than a third of consumers under age 42 say they are likely to buy the category online.



** Includes those who selected "More likely to purchase online" or "Equally likely to purchase at a physical store or online."*
B/C/D/E/F indicate significant differences at 90% confidence level.
Q5: For each type of fresh meat/protein, please tell us if you are more likely to purchase it online or from a physical store?

Older consumers are slower to buy fresh protein online, regardless of category.

Gen Z and Younger Millennials are the most likely to purchase fresh chicken online.

Open to Buying Fresh Protein Online*

Higher within Cohort

Lower within Cohort

	GEN Z: Under 27	Younger Millennial: Ages 27-33	Older Millennial: Ages 34-42	GEN X: Ages 43-58	Younger Boomers: Ages 59-67
Turkey	36%	33%	41%	25%	9%
Beef	41%	41%	37%	24%	10%
Chicken	36%	41%	32%	19%	10%
Eggs	34%	32%	31%	19%	15%
Fish/Seafood	32%	34%	31%	20%	9%
Pork	35%	29%	34%	17%	4%

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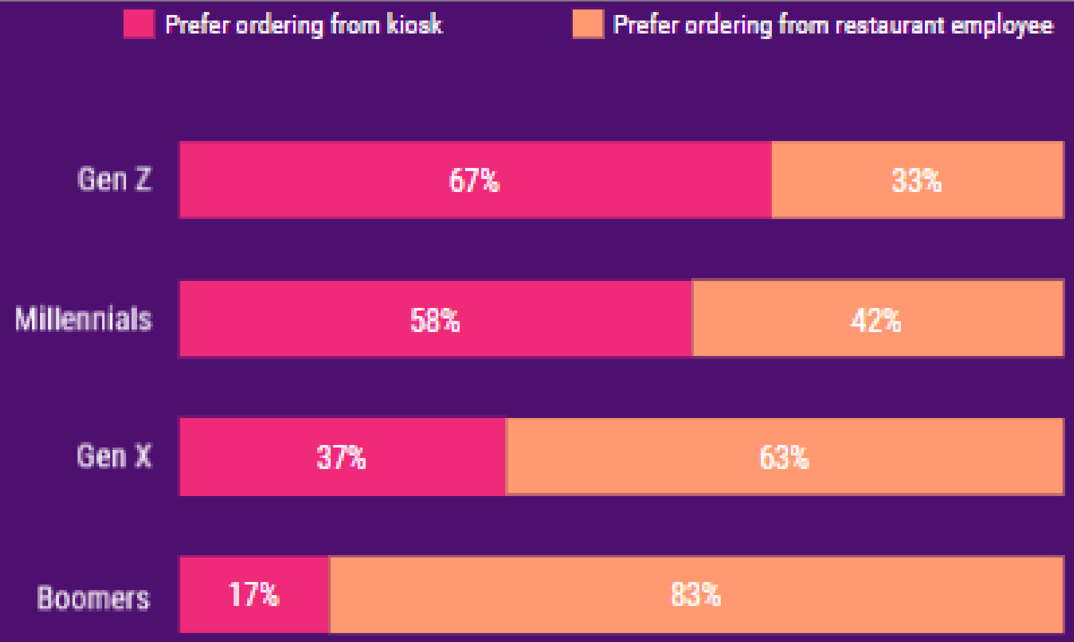
** Includes those who selected "More likely to purchase online" or "Equally likely to purchase at a physical store or online."*
B/C/D/E/F indicate significant differences at 90% confidence level.
Q5: For each type of fresh meat/protein, please tell us if you are more likely to purchase it online or from a physical store.

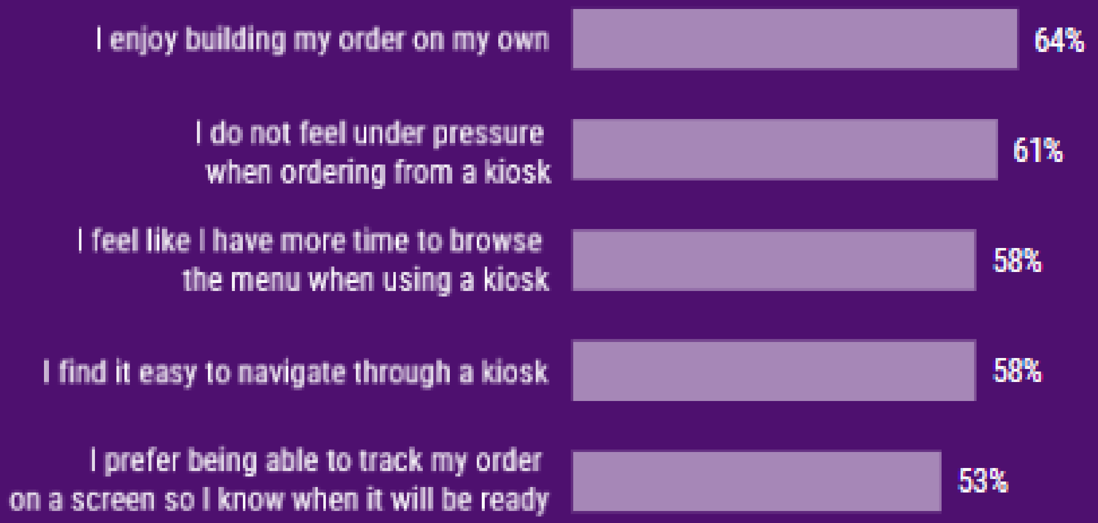
Approximately 60% of Gen Zs and Millennials Will Choose a Kiosk If Offered

‘Building an order on your own’ was the top benefit of kiosk ordering.

When looking at different generations, younger respondents prefer to order from a kiosk.

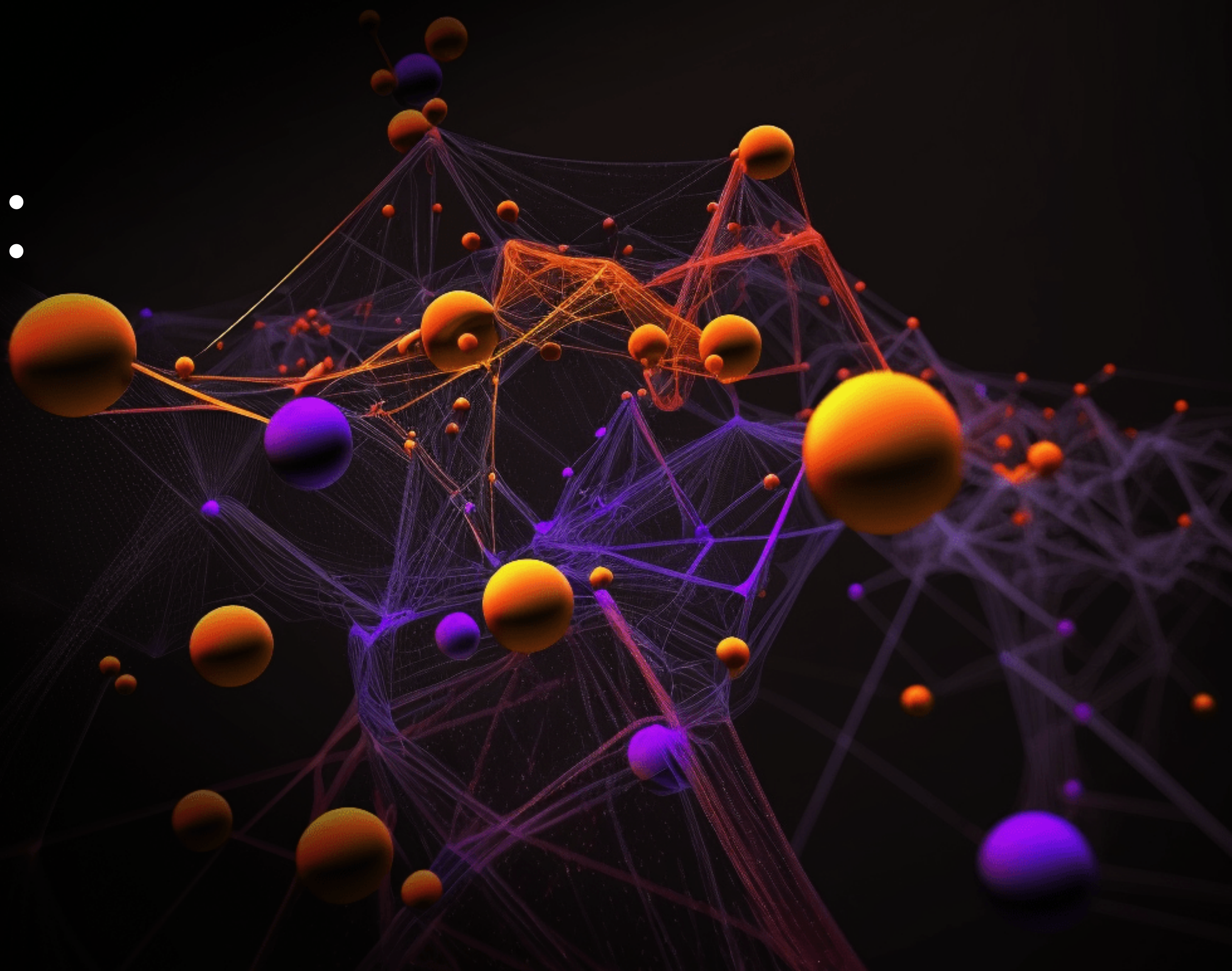


Overall benefits of kiosk usage in quick-service restaurants

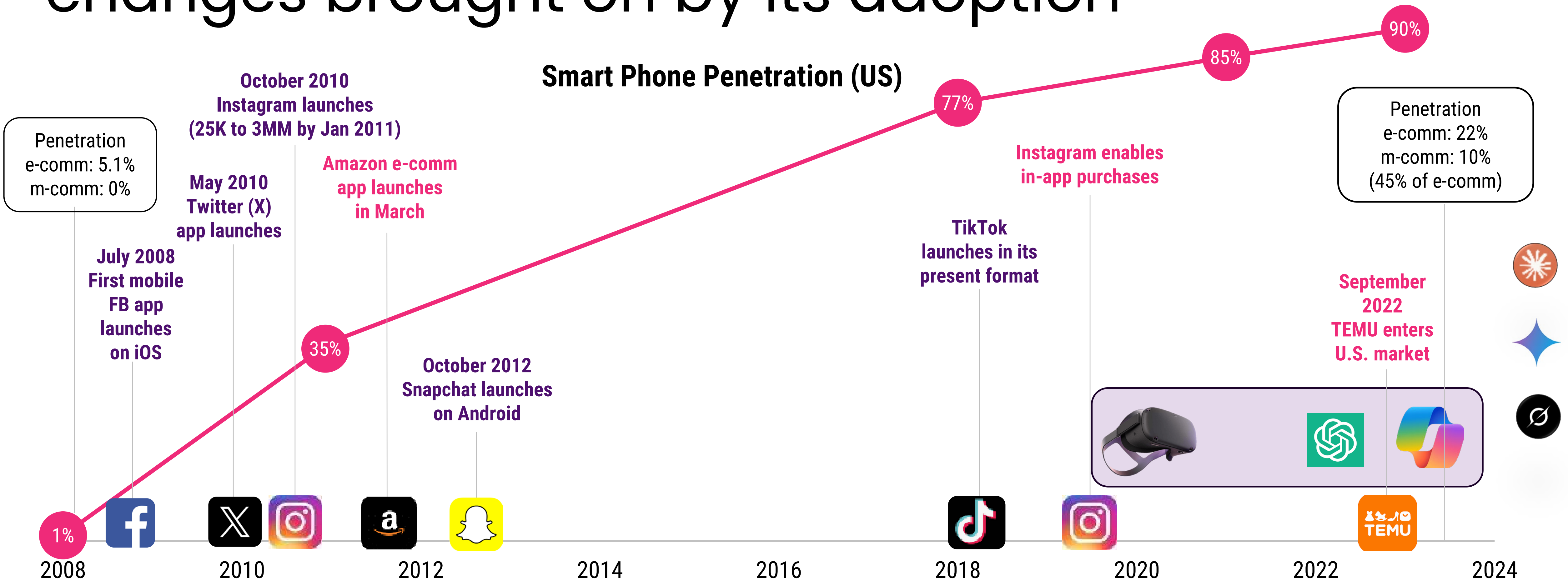


Note: Q4 2022 n786
Source: Revenue Management Solutions
Source: https://www.revenuemanage.com/wp-content/uploads/2023/01/Jan23-RMS-RestaurantConsumers-Kiosk.pdf

Tech Tendencies: AI & AI-Adjacent



U.S. smart phone ownership and key changes brought on by its adoption



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AI, voice assistance, and smart appliances still have room to grow while app usage is common.

Apps are becoming key platforms for grocery shopping. Social media is widely used for recipes and inspiration.

Usage of Digital Tools

Lines are blurring

	Grocery Shopping	Recipes & Inspiration	Diet Or Nutrition Plan	Meal Planning	Meal Prep
Smartphone app (e.g., grocery store app)	57%	39%	38%	37%	33%
Social media (e.g., TikTok, Pinterest, etc.)	17%	53%	23%	29%	31%
AI platform (e.g., ChatGPT, Gemini, etc.)	12%	18%	13%	17%	14%
Voice-activated assistant (e.g., Siri, Alexa, etc.)	13%	16%	9%	13%	13%
Smart appliance (e.g., smart refrigerator)	9%	8%	9%	7%	10%

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B/C/D/E/F indicate significant differences at 90% confidence level.
Q4: Which of the following, if any, do you currently use for...?

A relatively nascent technology, smart appliance use skews younger, especially Millennial

24% of fresh chicken buyers use a smart appliance for food shopping, **prep** or planning

	GEN Z: UNDER 27 (B)		YOUNGER MILLENNIAL: AGES 27-33 (C)		OLDER MILLENNIAL: AGES 34-42 (D)		GEN X: AGES 43-58 (E)		YOUNGER BOOMERS: AGES 59-67 (F)
Grocery shopping	14%	EF	21%	EF	15%	EF	3%		3%
Meal prep	11%	F	13%	F	15%	F	10%	F	3%
Meal planning	11%	F	13%	EF	12%	EF	6%	F	1%
Diet or nutrition plan	11%	F	13%	EF	17%	EF	6%	F	2%
Recipes and inspiration	11%	EF	11%	EF	14%	EF	4%		4%

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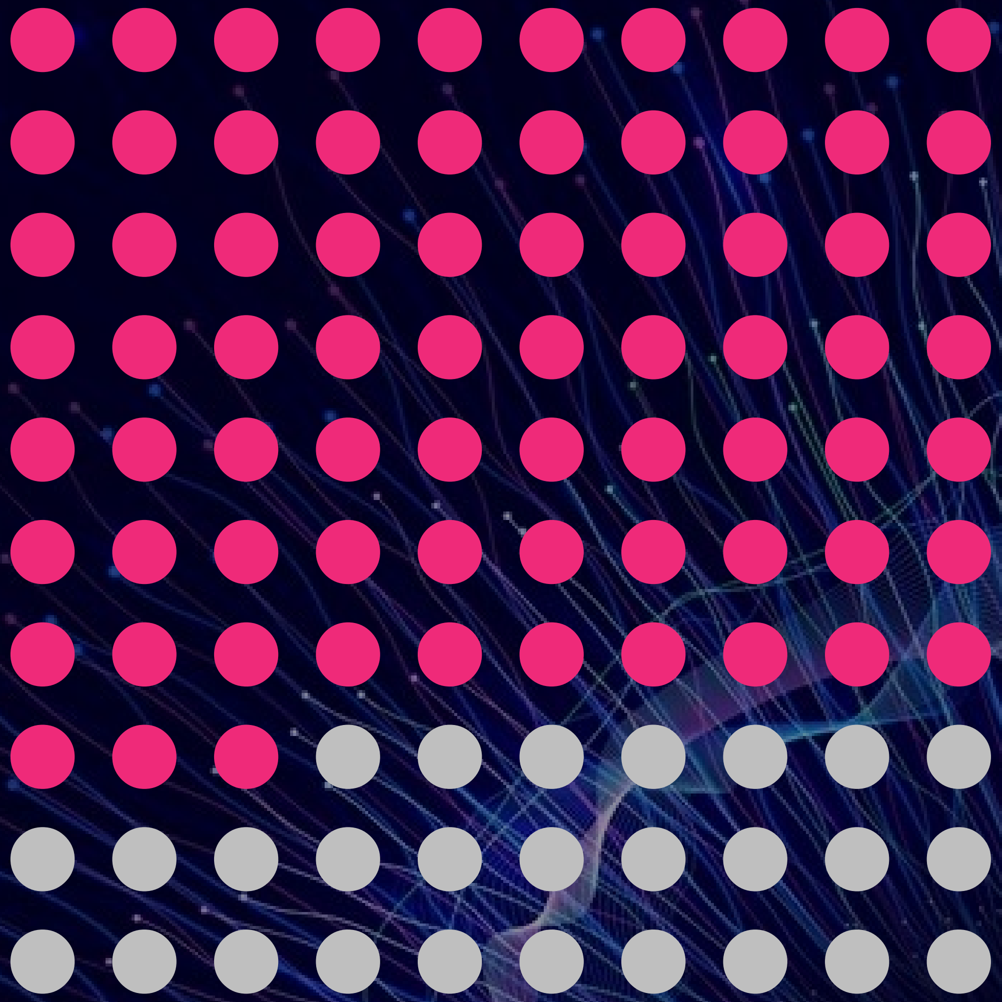
Q4: Which of the following, if any, do you currently use for...?

73%

of fresh chicken buyers are very/somewhat interested in using digital or "smart" appliances to help with **meal planning, meal preparation, and grocery shopping**



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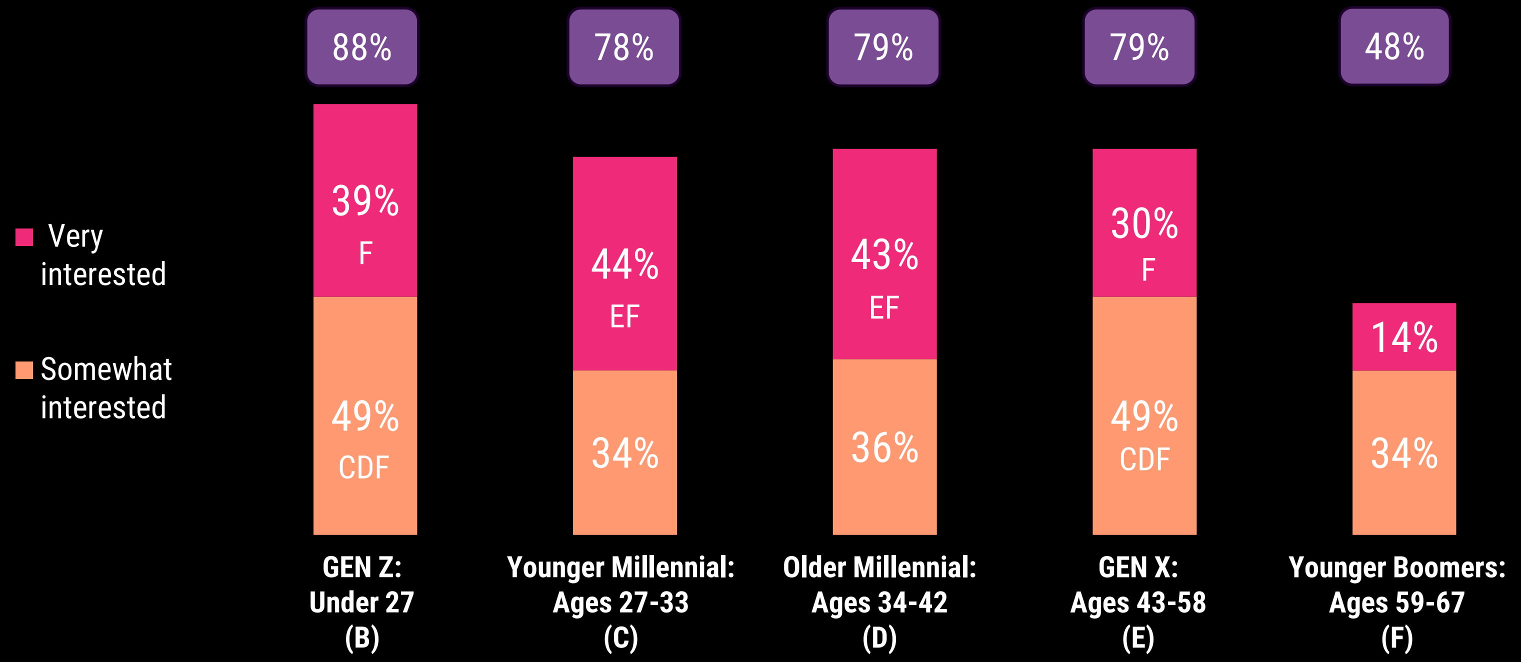
Though usage is still low for smart appliances, strong openness suggests wide potential.

Interest in Smart Appliance for Meal Planning, Prep, and Shopping



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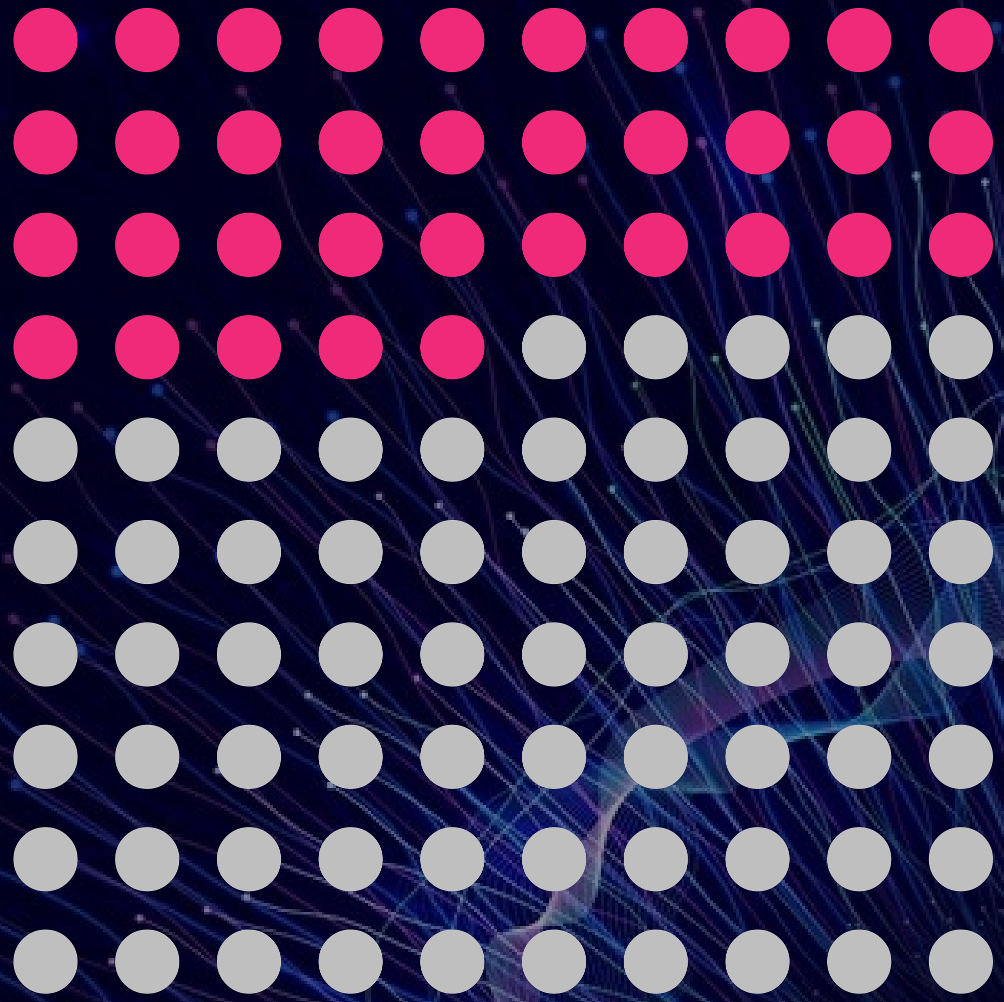
B/C/D/E/F indicate significant differences at 90% confidence level.

Q3: How interested are you in using digital or "smart" appliances (e.g. smart refrigerator) that are designed to help you with things like meal planning, meal preparation, and grocery shopping?

35%

of fresh chicken buyers use AI for food shopping, prep or planning



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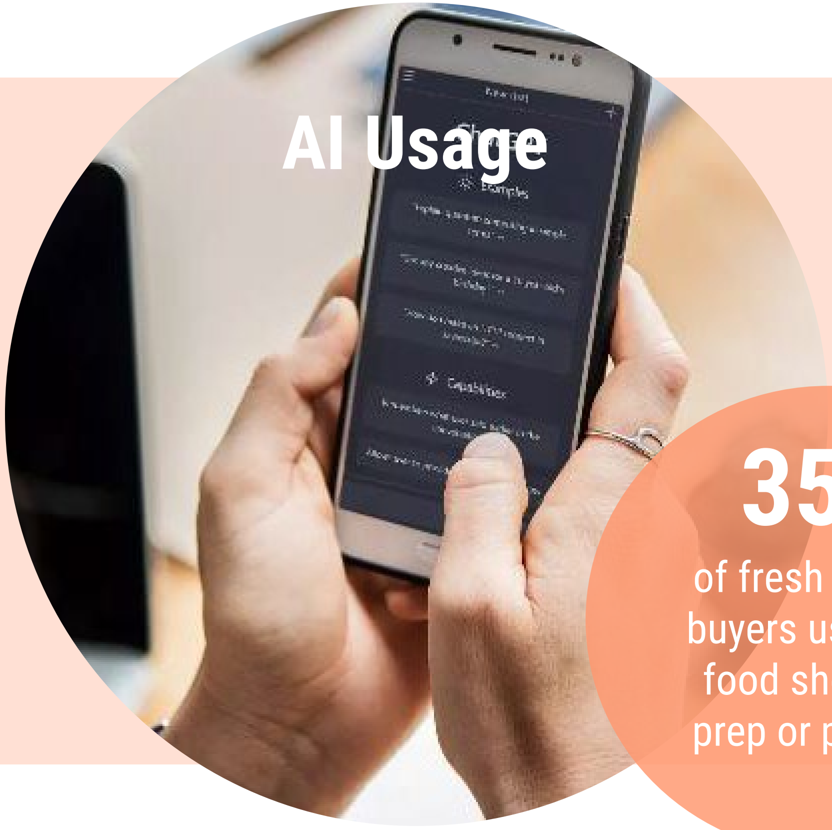
Not surprisingly AI use skews younger as well; this time GenZ leads the way.

AI Usage



35%
of fresh chicken buyers use AI for food shopping, prep or planning

	GEN Z: UNDER 27 (B)	YOUNGER MILLENNIAL: AGES 27-33 (C)	OLDER MILLENNIAL: AGES 34-42 (D)	GEN X: AGES 43-58 (E)	YOUNGER BOOMERS: AGES 59-67 (F)
Recipes and inspiration	**28%** EF	22% F	26% F	18% F	8%
Diet or nutrition plan	**26%** EF	19% EF	17% EF	9%	6%
Meal planning	22% F	19% F	**24%** F	16% F	6%
Meal prep	**19%** F	13% F	17% F	17% F	4%
Grocery shopping	15% F	17% F	**19%** EF	10%	5%

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Q4: Which of the following, if any, do you currently use for…?

What's Next

The Next Big Thing

AI-Enabled Shopping / Cooking

- **Shopping Help:** Order ingredients via pictures from the fridge or images from a phone screen
- **Cooking Help:** Step by step, interactive, cooking instructions – as if mom / dad is in the kitchen
- **Discovery Help:** Individually tailored new recipe / restaurant recommendations via analyzing past interactions

In-Stream Product Interaction

- Video streaming becomes interactable and "clickable"
- Consumers can order what an actor is wearing; they can order the recipe or ingredients of a dish they see on their screens
- This emerging technology is the analog of in-app purchases of social media apps and can proliferate similarly

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Thank you

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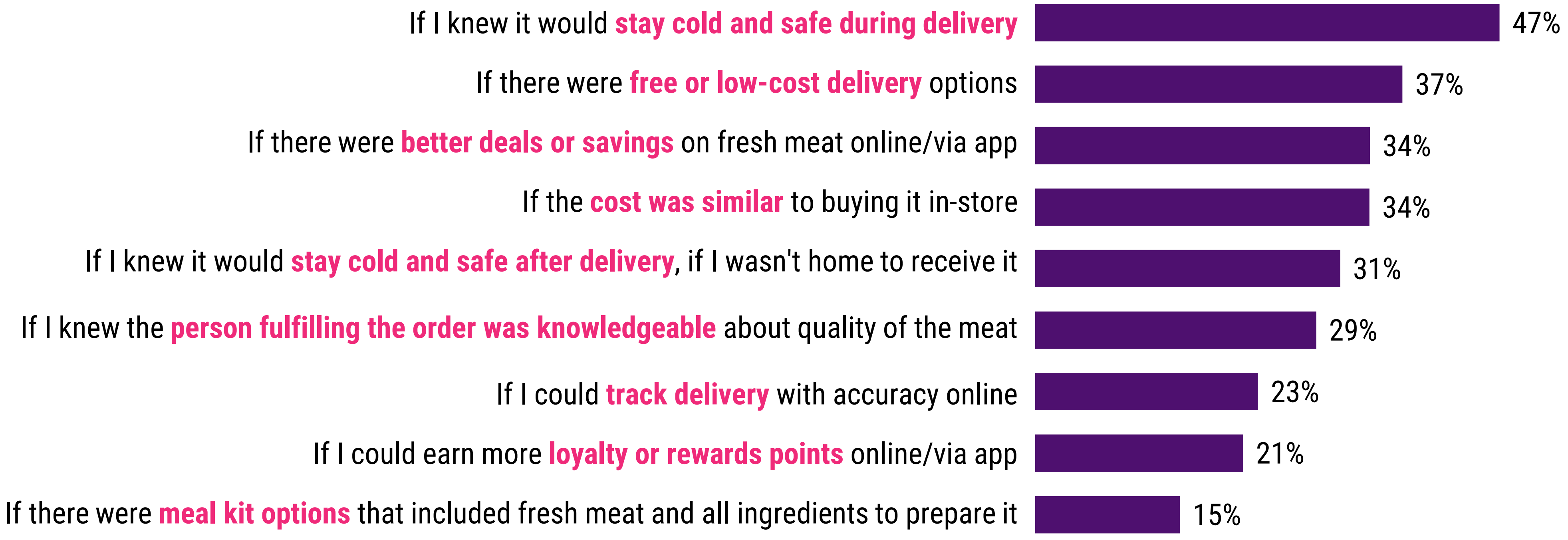
Appendix

Reinforce safety and alleviate delivery barriers to increase fresh protein purchases online.

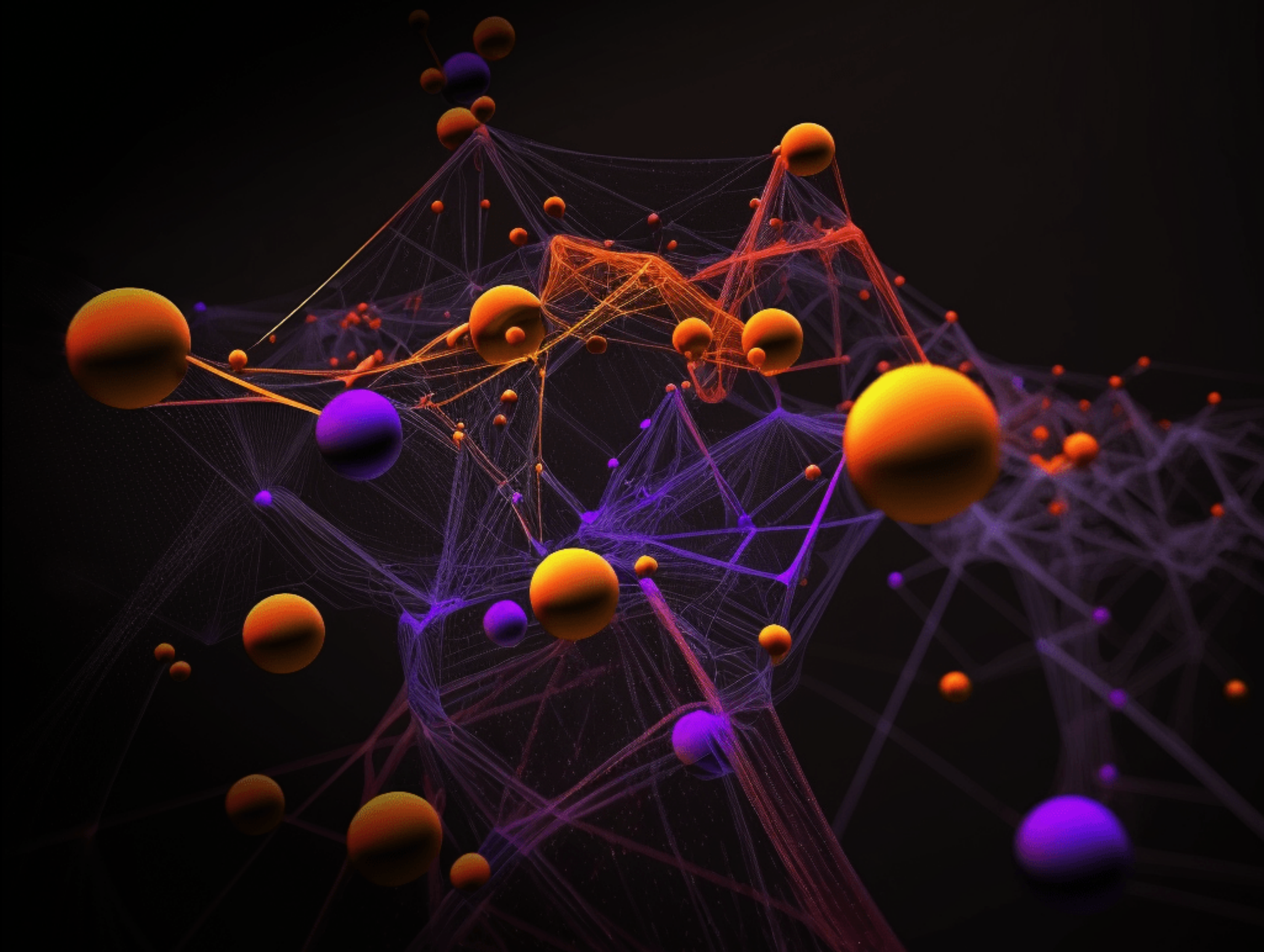
Safe transport, delivery costs and pricing are is still sticking points for those who still prefer in-person shopping.

Online Purchase Motivators – Among Those More Likely to Purchase Fresh at Store



Q6: Which of the following, if any, would motivate you to go online or use an app to buy fresh, raw…?

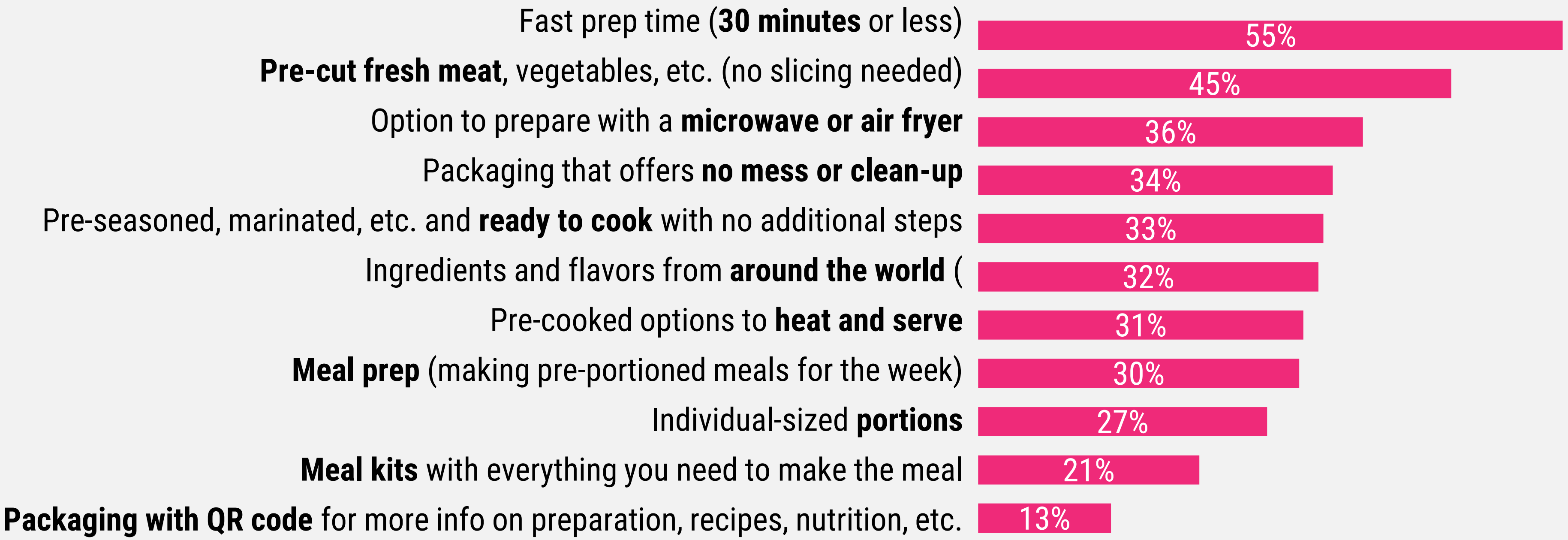
Consumer Priorities



Quick prep and cooking “short cuts” are a priority.

Time-savers like pre-sliced meat, microwave/air fryer-friendly options, and no clean-up are top priorities.

Food Prep Priorities



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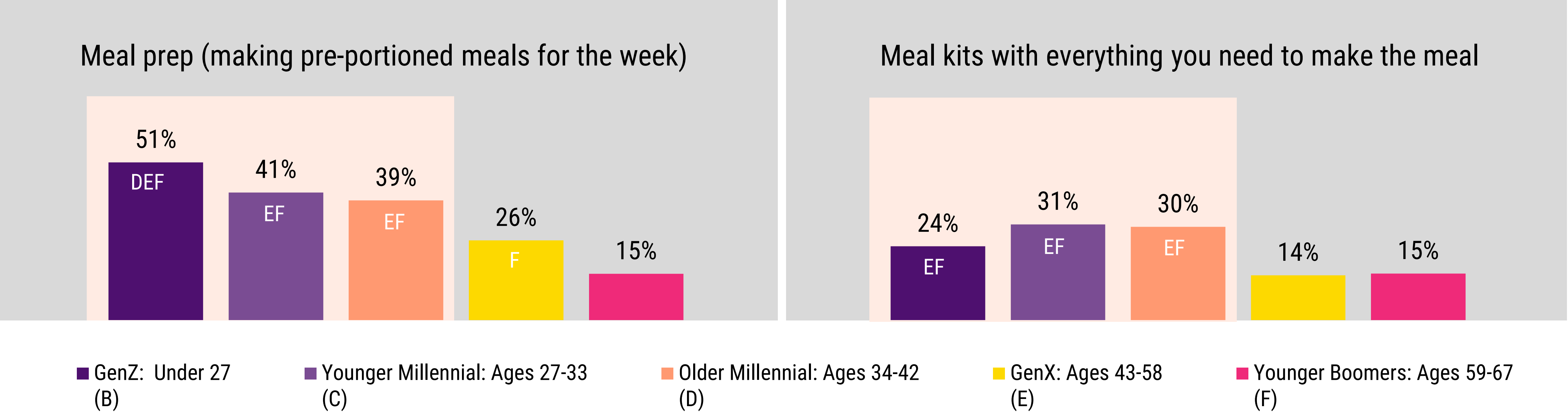
Q1: When it comes to preparing food to eat or serve, which of these are a priority for you and your household right now?

Entire meal solutions align best with needs of younger consumers.

Meal prep and meal kits are more of a priority for younger generations.

"Priority right now"



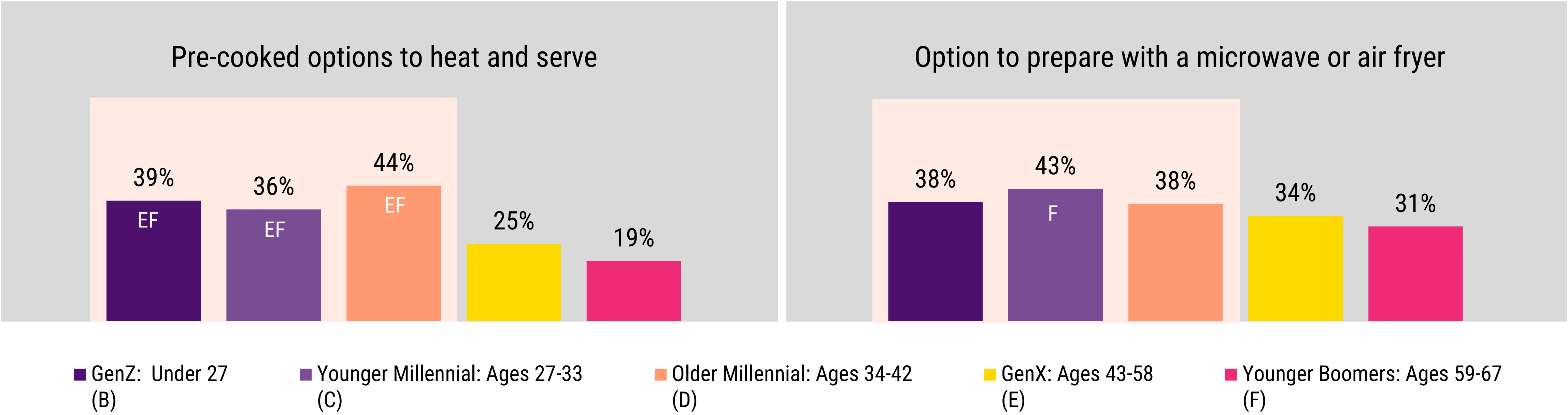
B/C/D/E/F indicate significant differences at 90% confidence level.

Q1: When it comes to preparing food to eat or serve, which of these are a priority for you and your household right now?

Heat and serve options are especially relevant to younger cohorts right now.

Pre-cooked or microwave/air fryer-friendly options are more sought-after among younger consumers.

"Priority right now"

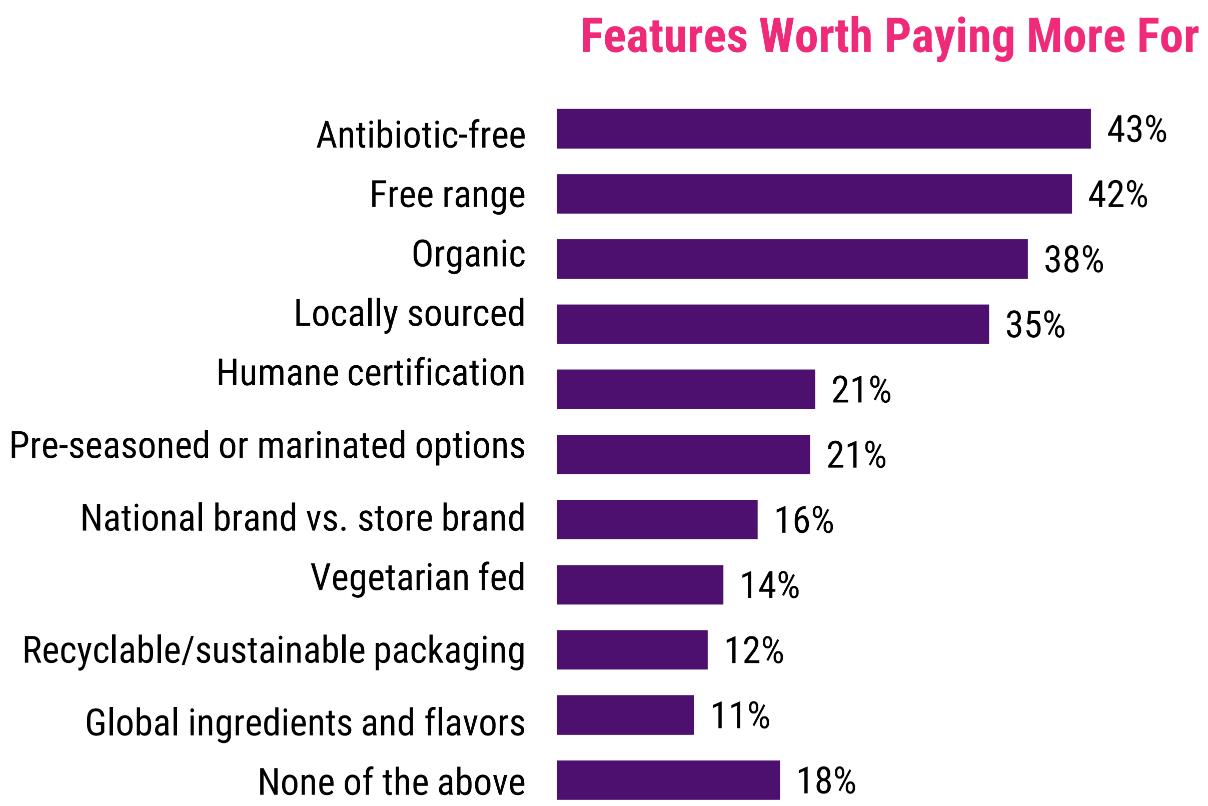


B/C/D/E/F indicate significant differences at 90% confidence level.

Q1: When it comes to preparing food to eat or serve, which of these are a priority for you and your household right now?

Lack of antibiotics, animal welfare, and sourcing command premium pricing for many.

2 out 5 would pay more for Antibiotic-free, free range, or organic chicken items.



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B/C/D/E/F indicate significant differences at 90% confidence level.

Q7: When it comes to fresh, raw chicken, which of the following features, if any, do you feel is worth paying more for?

Features Worth Paying More For

	Total Raw Chicken Buyers N=625	GEN Z: UNDER 27 N=110	YOUNGER MILLENNIAL: AGES 27-33 N=129	OLDER MILLENNIAL: AGES 34-42 N=131	GEN X: AGES 43-58 N=139	YOUNGER BOOMERS: AGES 59-67 N=116
Antibiotic-free	43%	54	83	100	127	89
Free range	42%	68	91	116	111	91
Organic	38%	118	128	109	100	70
Locally sourced	35%	99	93	113	103	90
Humane certification	21%	113	94	149	84	78
Pre-seasoned or marinated options	21%	96	115	109	105	71
National brand vs. store brand	16%	141	144	175	58	61
Vegetarian fed	14%	120	93	108	113	78
Recyclable/sustainable packaging	12%	219	122	137	65	72
Global ingredients and flavors	11%	185	141	172	79	14

Green = Over-indexing vs. Total Raw Chicken Buyers
Red = Under-indexing vs. Total Raw Chicken Buyers

Q7: When it comes to fresh, raw chicken, which of the following features, if any, do you feel is worth paying more for?

Opportunity to appeal to Gen Z with organic and vegetarian fed offerings.

Gen Z are more willing to pay for organic and vegetarian fed products compared to Boomers.

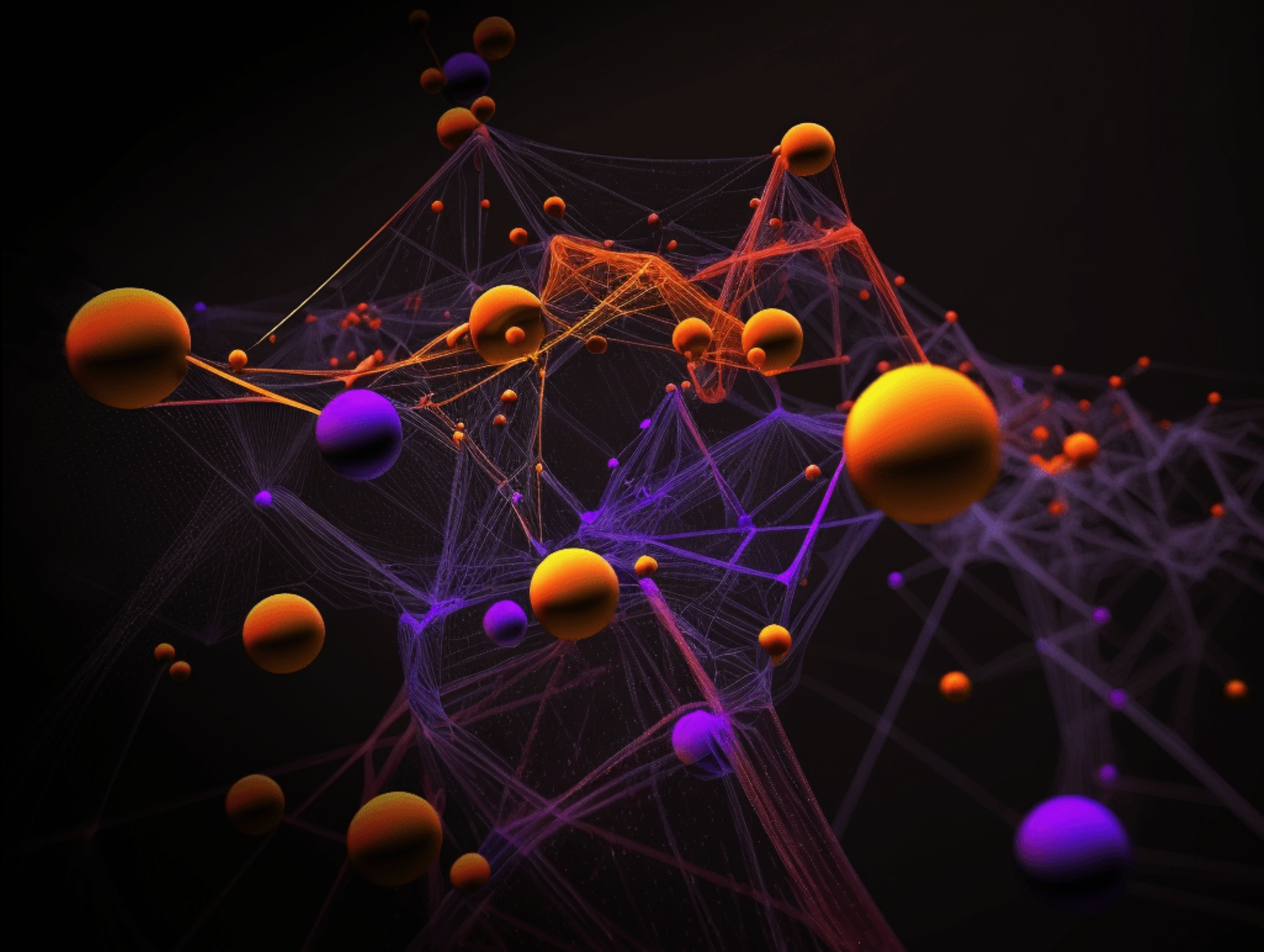
Features Worth Paying More For

	Total Raw Chicken Buyers	GEN Z: UNDER 27	YOUNGER MILLENNIAL: AGES 27-33	OLDER MILLENNIAL: AGES 34-42	GEN X: AGES 43-58	YOUNGER BOOMERS: AGES 59-67
Antibiotic-free	43%	54	83	100	127	89
Free range	42%	68	91	116	111	91
Organic	38%	118	128	109	100	70
Vegetarian fed	14%	120	93	108	113	78

Green = Over-indexing vs. Total Raw Chicken Buyers
Red = Under-indexing vs. Total Raw Chicken Buyers

Q7: When it comes to fresh, raw chicken, which of the following features, if any, do you feel is worth paying more for?

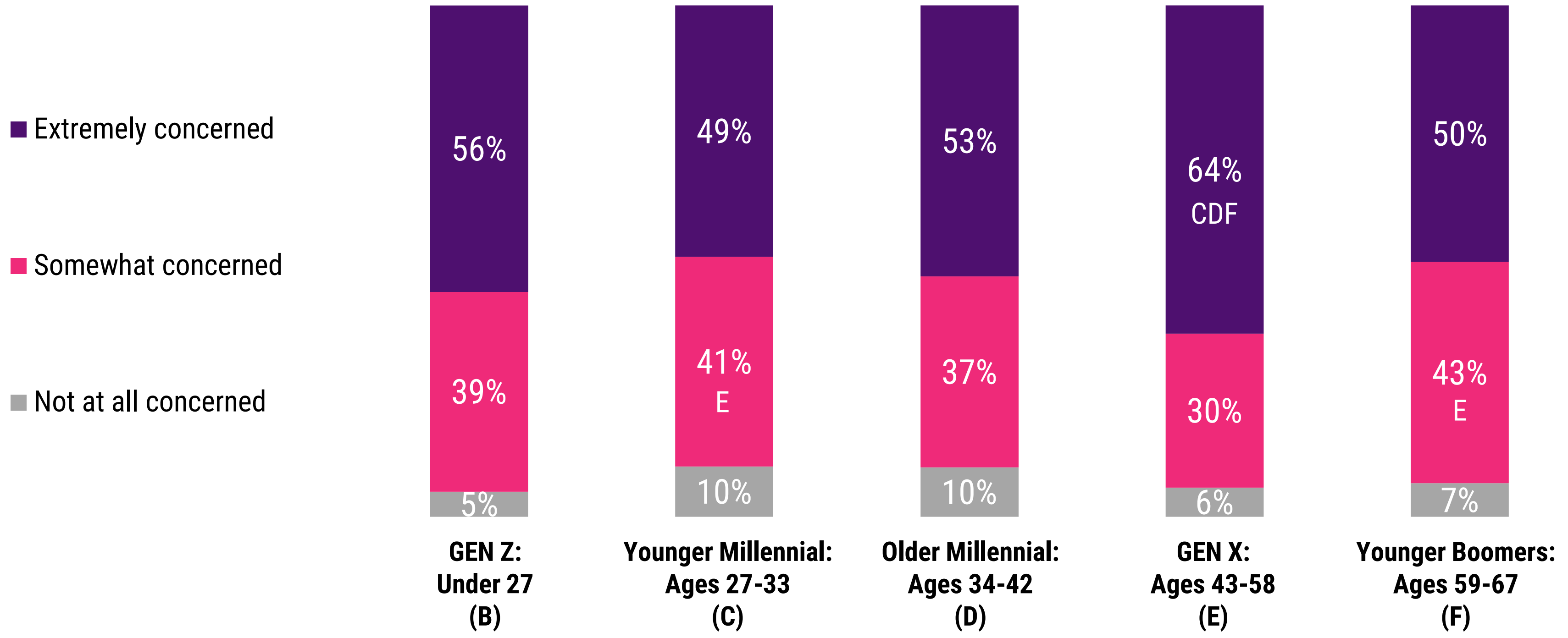
Impact of Inflation



Chicken buyers are heavily impacted by inflation, regardless of cohort.

More than half of chicken buyers are "extremely concerned" about food costs. GenX is especially impacted.

Concern Over Inflation



Chicken Marketing Summit Survey 2025

Q8: Thinking about your own household, how concerned are you right now about food cost inflation?

Deals and promotions are especially appealing to GenX and older consumers right now.

GenX and Younger Boomers are more likely to research deals and stock up when there's a sale.

Recent Money-saving Shopping Tactics

	GEN Z: Under 27 (B)	Younger Millennial: Ages 27-33 (C)	Older Millennial: Ages 34-42 (D)	GEN X: Ages 43-58 (E)	Younger Boomers: Ages 59-67 (F)
Looked for sales, coupons, or promotions before going shopping	52%	49%	54%	59% C	73% BCDE
Bought more of an item because it was on sale or deal	44%	58% B	51%	57% B	61% B

Circana.

B/C/D/E/F indicate significant differences at 90% confidence level.

Q9: Which of the following, if any, have you done in the past 1-2 months when shopping for groceries?

Opportunity to increase purchases of fresh chicken with the rise of at-home meals.

In addition to sales and deals, consumers are turning to home meals and being more judicious with shopping choices.

Recent Money-saving Shopping Tactics

B/C/D/E/F indicate significant differences at 90% confidence level.
Q9: Which of the following, if any, have you done in the past 1-2 months when shopping for groceries?