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2026 Chicken Marketing Summit Survey

July 2026

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Circana

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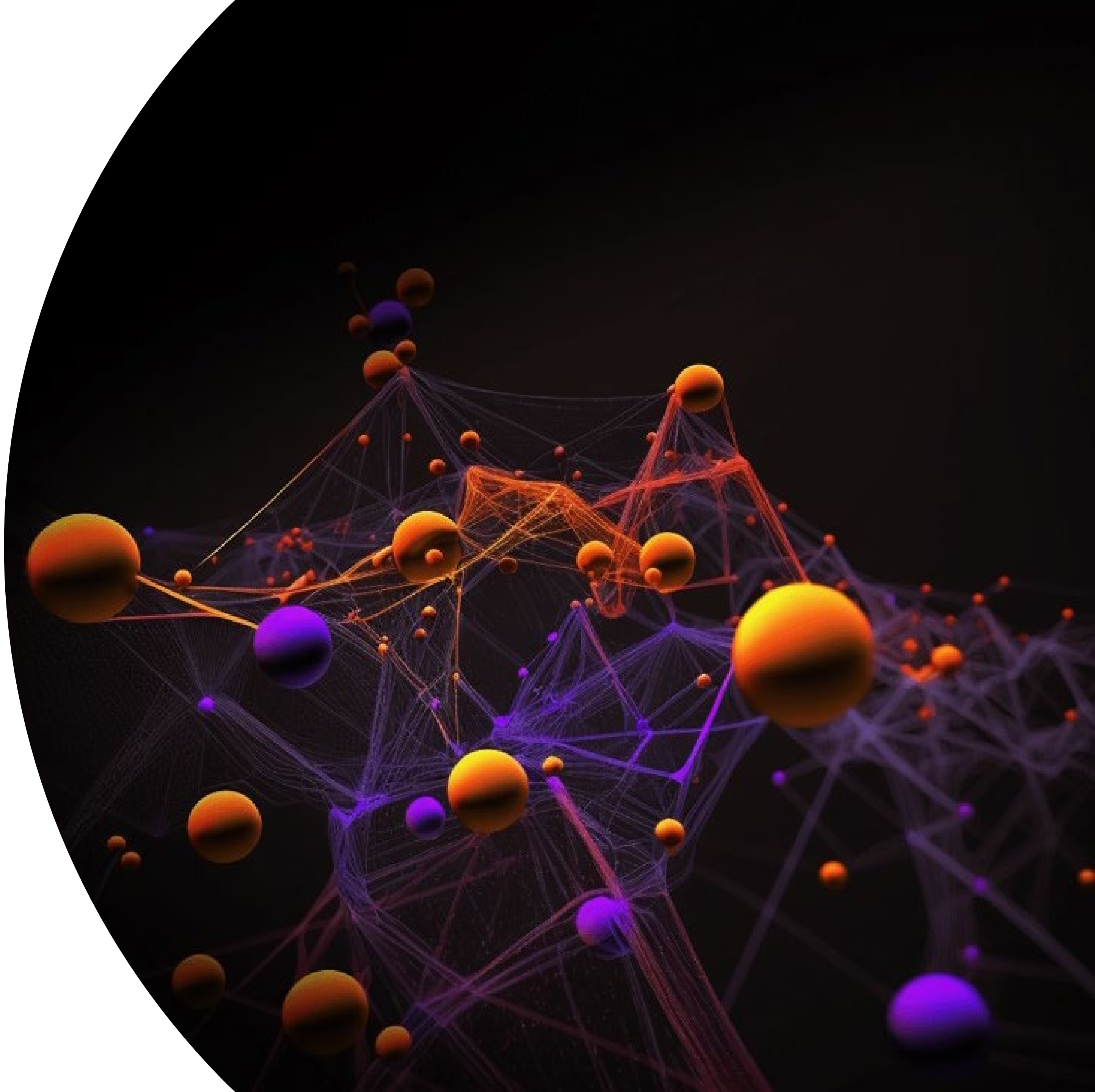

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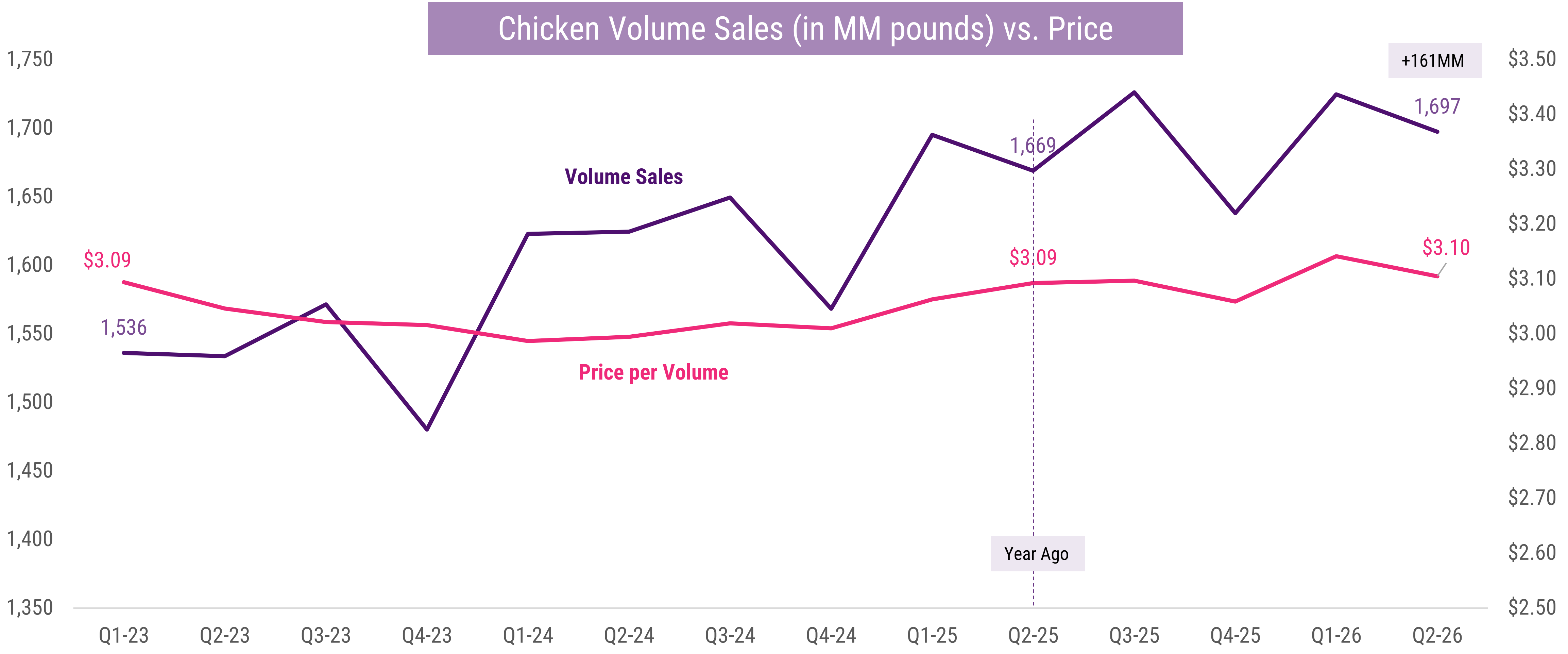
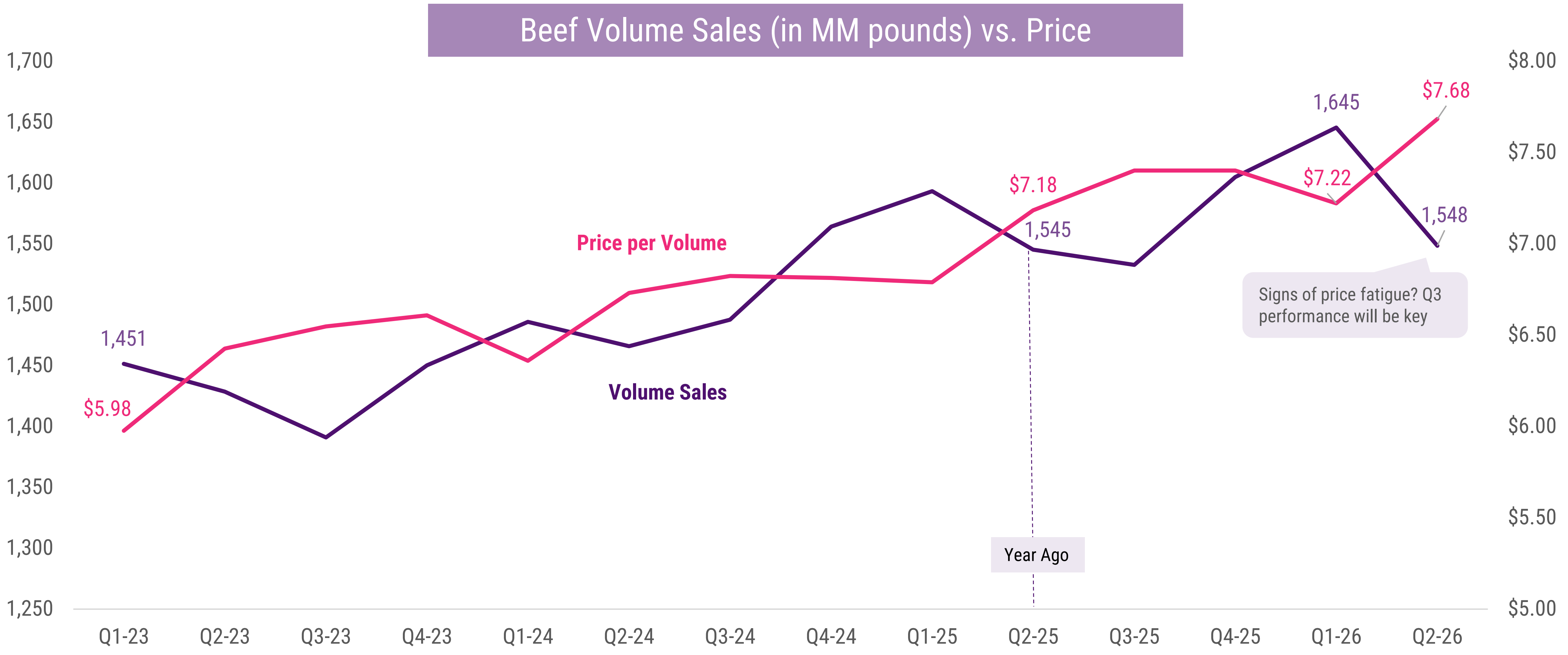
Macro Overview

Chicken price has been flat since 2023. This may have helped the strong 3 year (Q2-26 vs. Q2-23) net growth of 163MM pounds/quarter



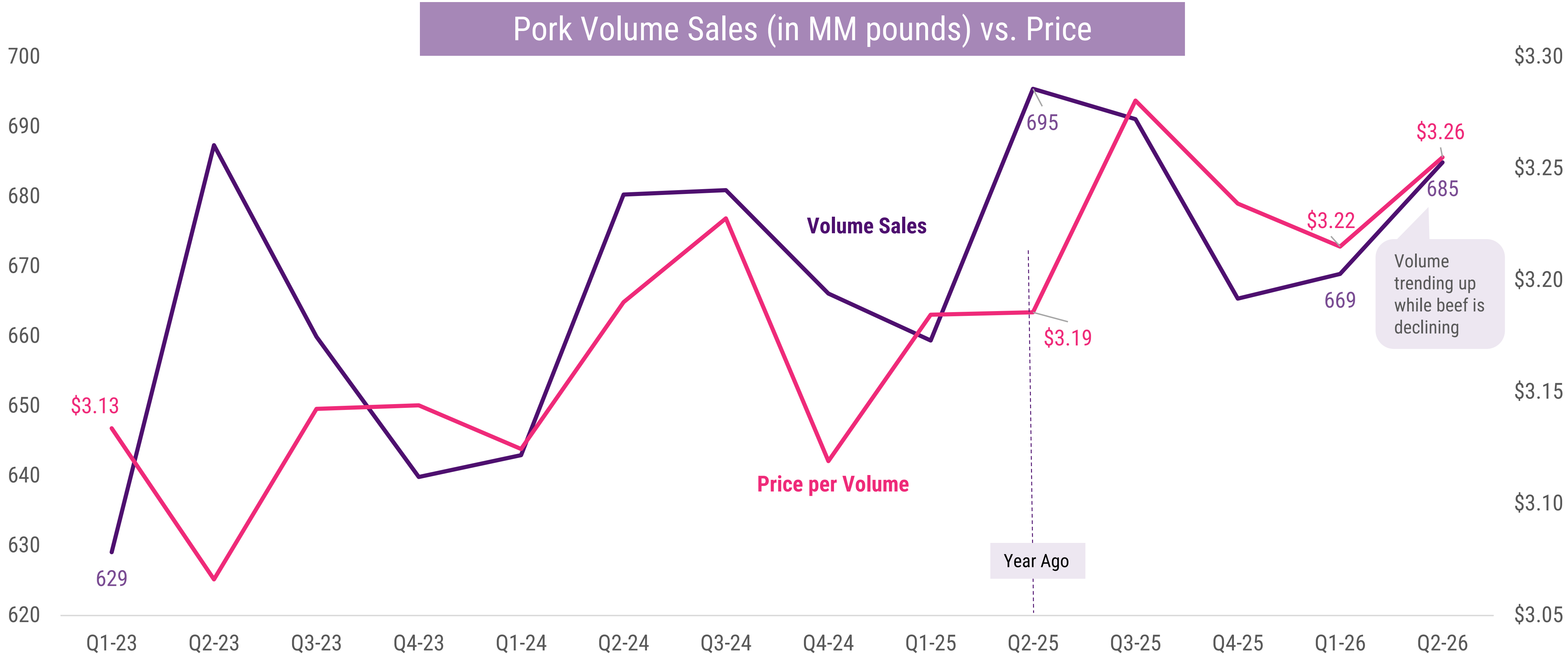
Circana Integrated Fresh MA Database – 1/1/2022 – 6/28/2026

Beef prices, and surprisingly volume sales continue to climb together. The massive $0.46 price hike may have tested the consumer's tolerance.



Circana Integrated Fresh MA Database – 1/1/2022 – 6/28/2026

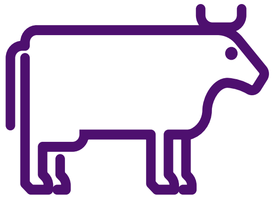
Like beef, but not to that extent, pork volume sales rose along with price per volume.



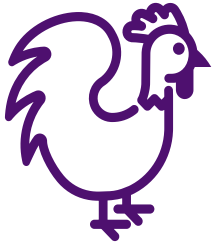
Circana Integrated Fresh MA Database – 1/1/2022 – 6/28/2026

Americans consumed 1.41 billion pounds more core proteins* vs 3 years ago; or +4.3 pounds/person. The protein uptrend is very strong.

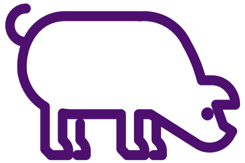
(*) Fresh Beef, Chicken & Pork



6.3B lbs
+603MM lbs | +10.5%



6.8B lbs
+748MM lbs | +12.4%



2.7B lbs
+62MM lbs | +2.4%

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Circana Integrated Fresh MA Database 52 Weeks Ending 07/12/26

Aided by high prices, beef continued to enjoy growth across generations, chicken numbers, while positive were pedestrian.

Dollars Per Buyer % Change vs. YA





	All HH Generations	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	10.9	12.8	13.0	10.2	9.7	7.0
CHICKEN	3.8	4.3	4.2	3.4	2.8	2.5
PORK	3.9	8.5	4.6	4.0	1.7	3.9

Beef growth especially strong within Gen Z and Millennials (younger than 44)

Top Performer

Bottom Performer

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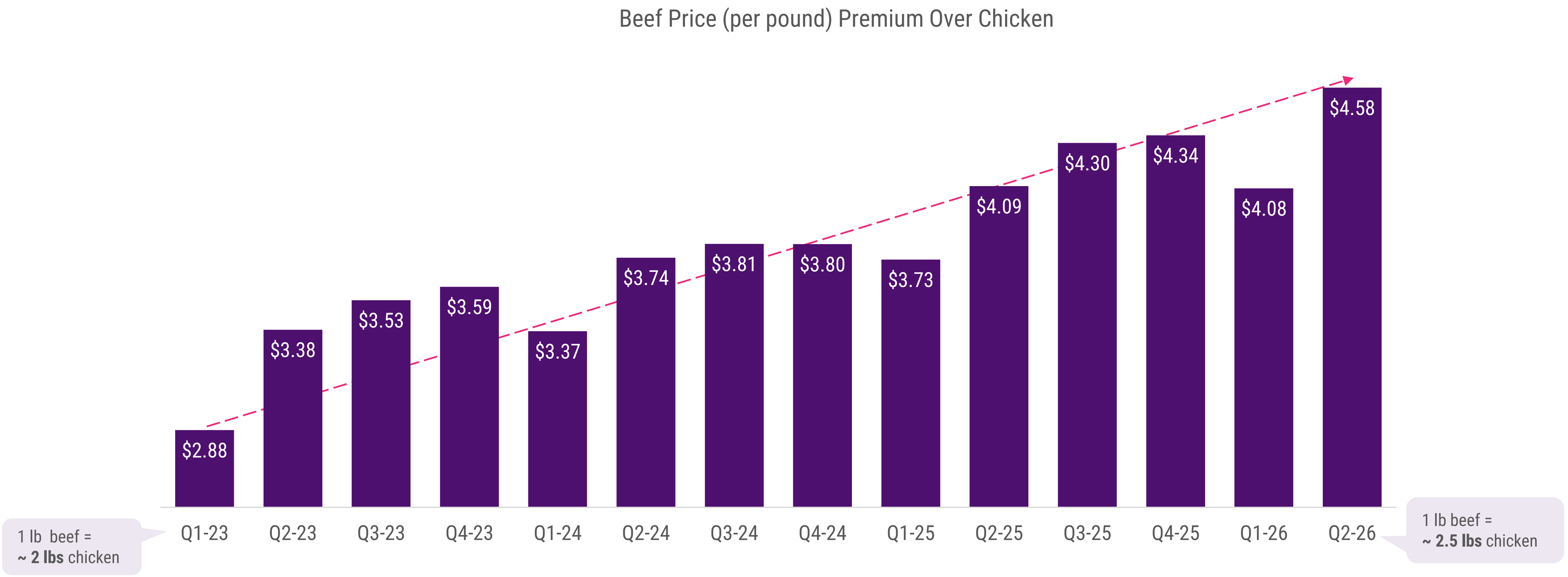
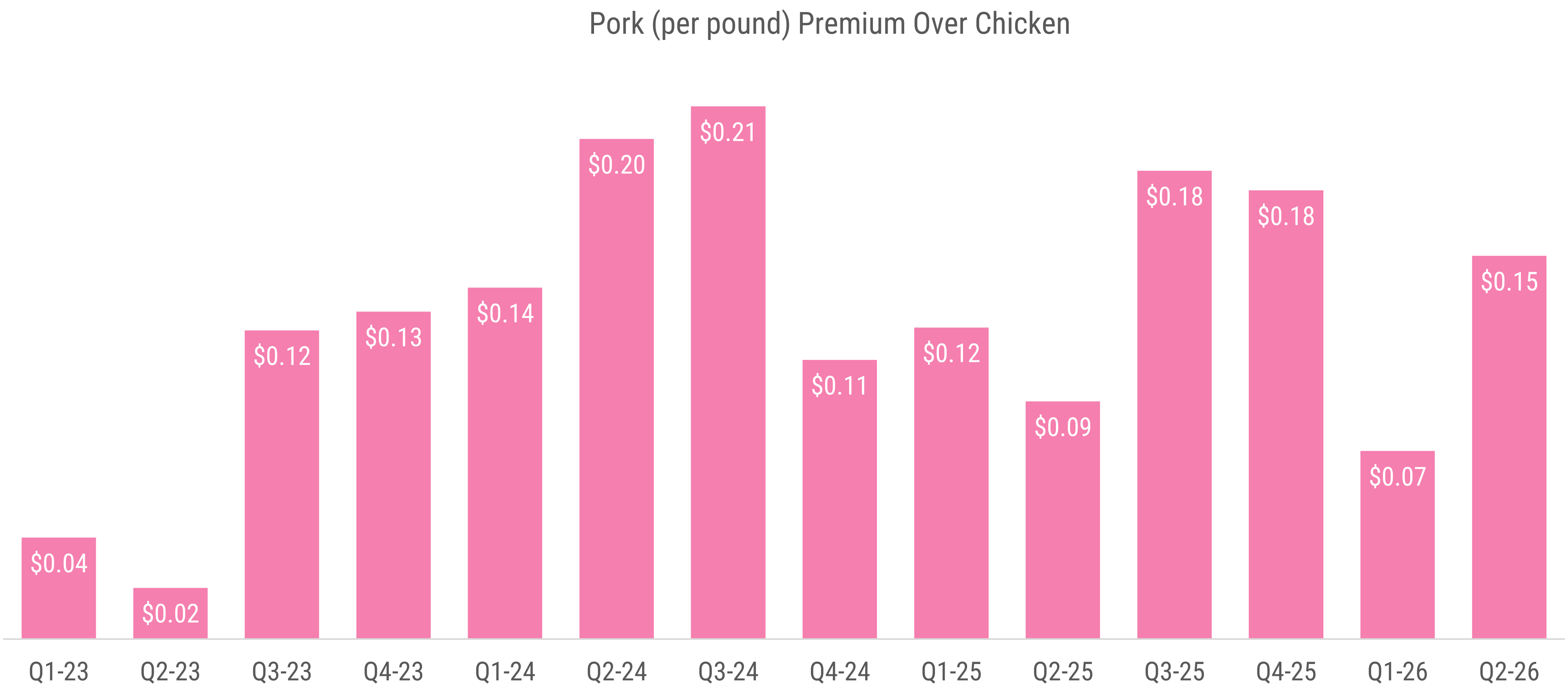
Circana Integrated Panel Database – 52 Weeks Ending 6/14/2026

Beef price premium over chicken continues to climb. Since the beginning of 2023, the gap widened from $2.88 to $4.58 (+$1.70)



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

Pork prices remained consistently, albeit slightly, above Chicken's



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

The Consumer Speaks

Survey Methodology

Survey Sample

N= 535 Raw Chicken Buyers

Gen Z to Younger Boomers

Age 18-67

Custom survey

- Online survey
- Fielded June 2026

GEN Z: Under 27	n=73
Younger Millennial: Ages 27-33	n=77
Older Millennial: Ages 34-42	n=127
GEN X: Ages 43-58	n=133
Younger Boomers: Ages 59-67	n=125

Research Goal

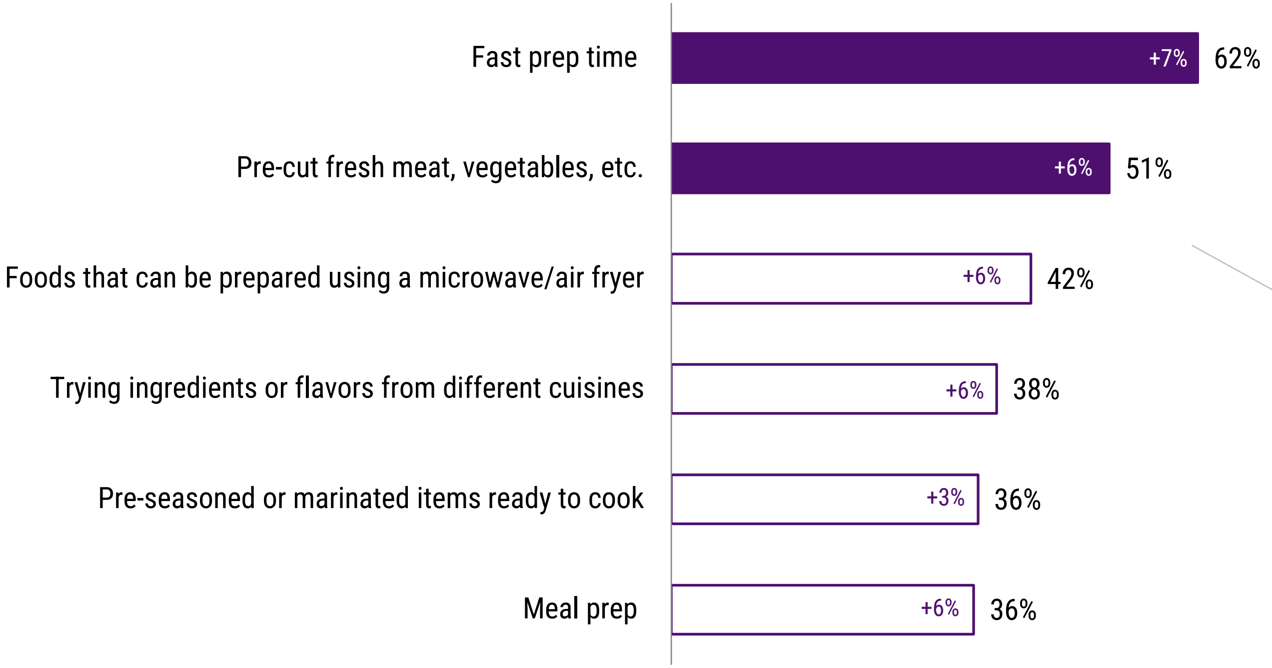
To better understand how consumers' current attitudes regarding GLP-1 and new dietary guidelines and their impact on food purchases.

Convenience in Different Forms

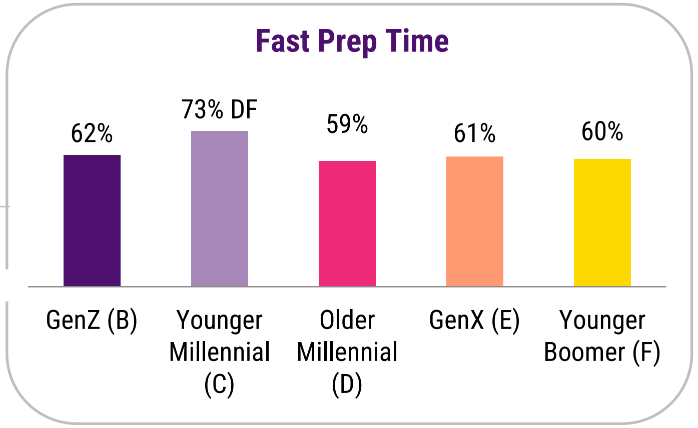
Time-saving meal prep is a top priority, led by fast prep times.

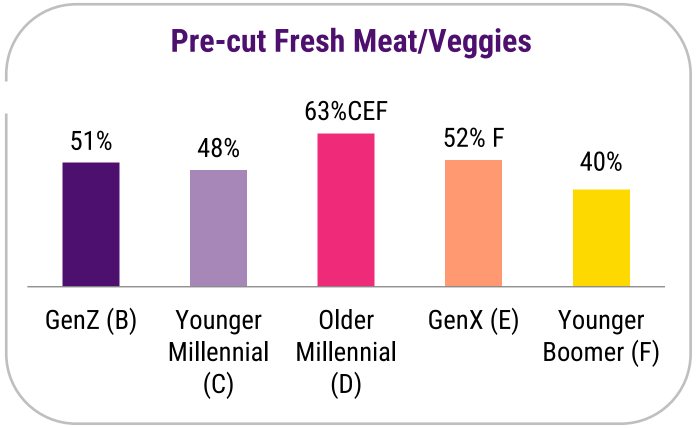
“Easy & Fast” continues to resonate with the younger generations

Top Meal Prep Priorities



Total Buyers N=535





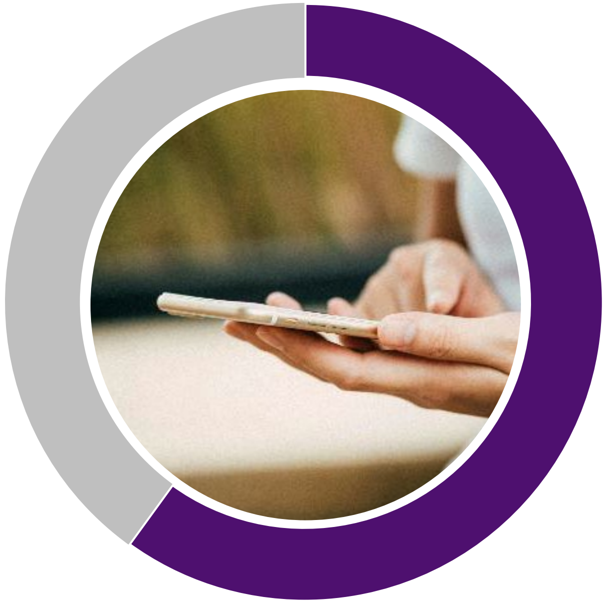
Letters indicate statistically higher at the 90% confidence level

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

6 in 10 buy groceries online, led by younger shoppers

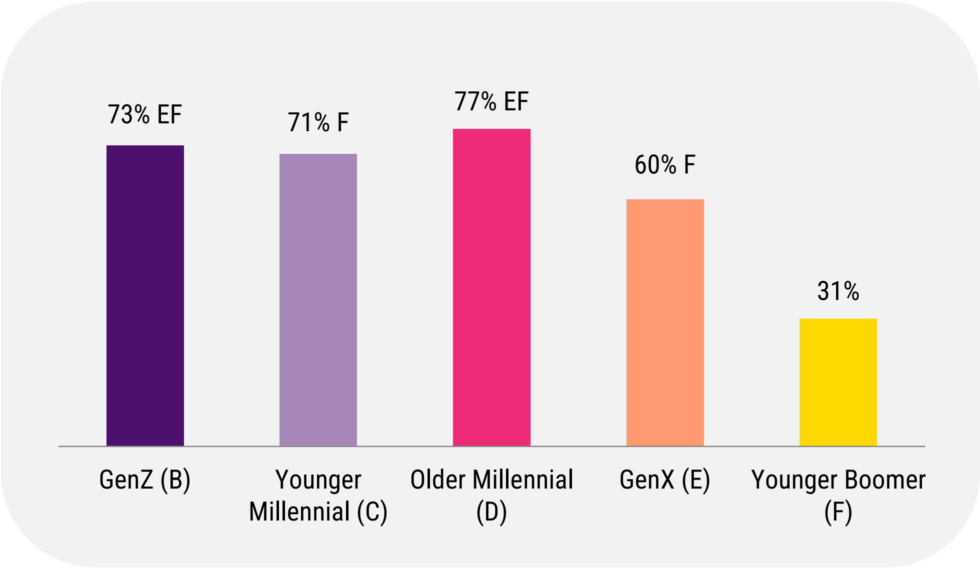
There is a steep drop off with Boomers (31%)

Online Pickup/Delivery



60%

Purchase groceries online or via a mobile app for pickup or delivery **once a month or more**



Letters indicate statistically higher at the 90% confidence level

2026 Chicken Marketing Summit Survey

Q2: In the past year, how often do you purchase groceries online or via a mobile app for pickup or delivery? Please provide your best estimate.

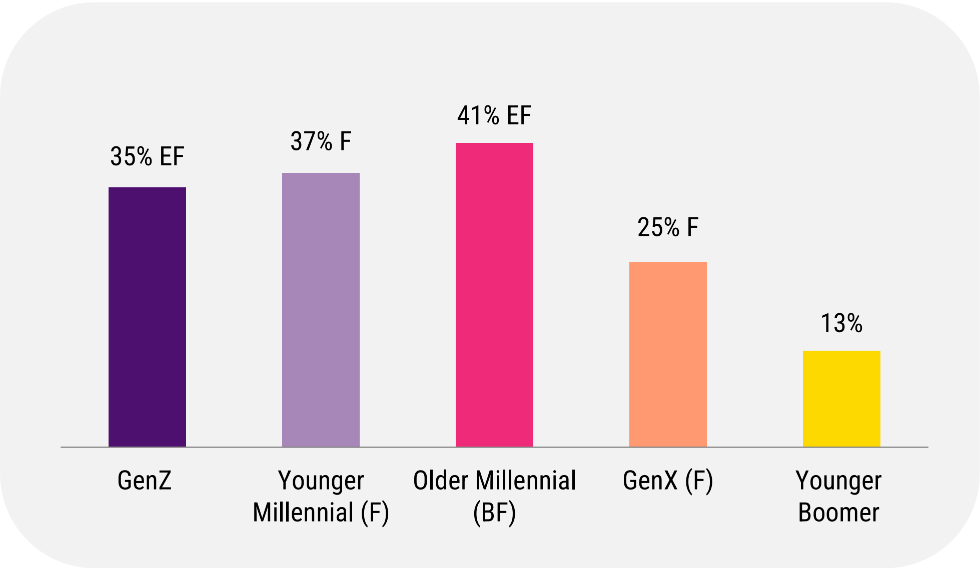
At weekly level, the younger generations continue to lead the online grocery shopping trend

1 in 5 GenZers buy online groceries **more than** once a week (2x the average)

Online Pickup/Delivery

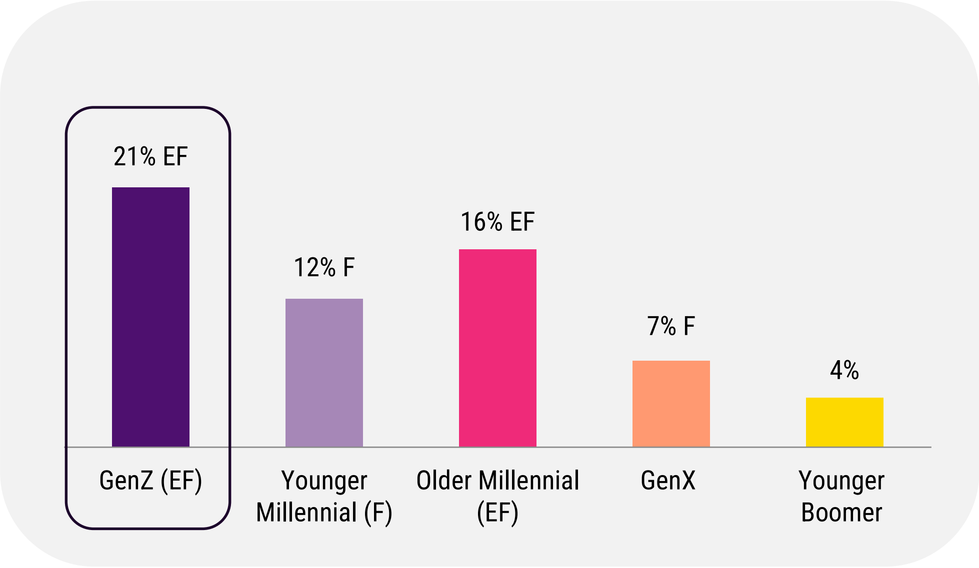
28%

Once a week or more



10%

More than once a week



Letters indicate statistically higher at the 90% confidence level

2026 Chicken Marketing Summit Survey

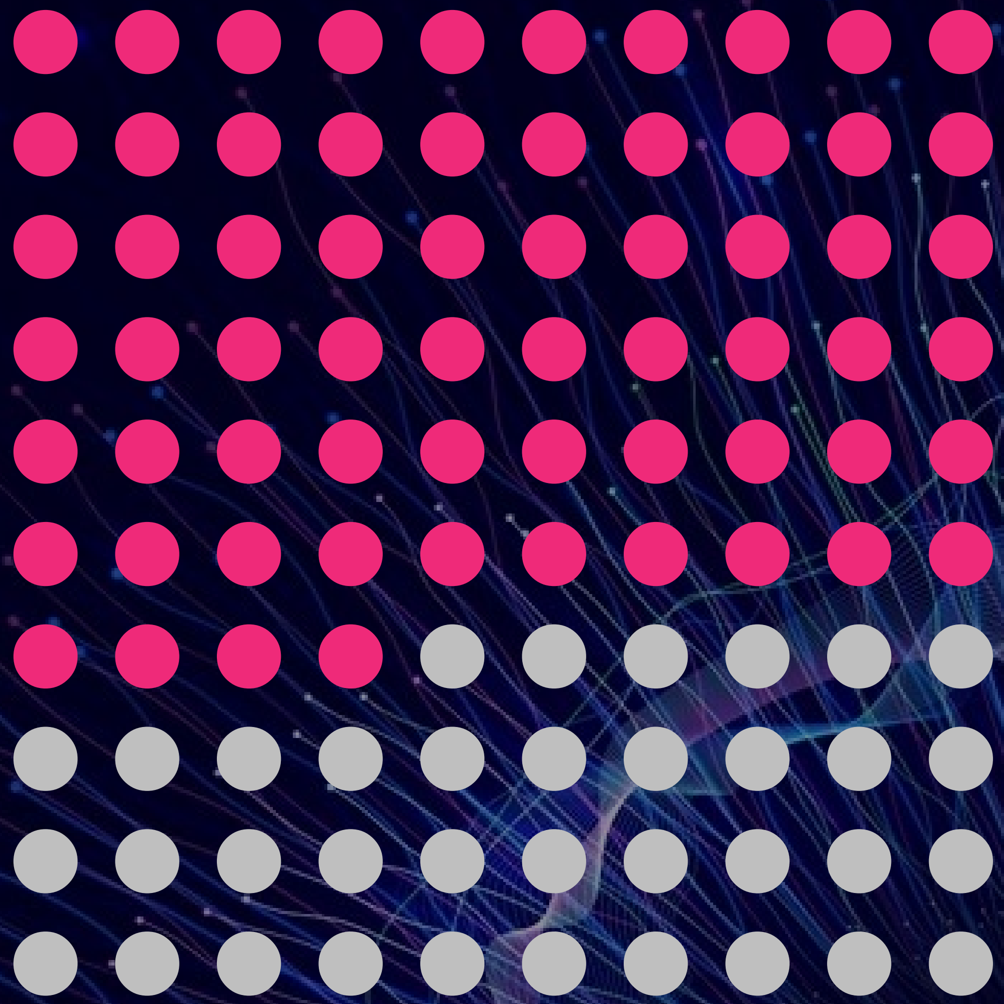
Q2: In the past year, how often do you purchase groceries online or via a mobile app for pickup or delivery? Please provide your best estimate.

Chicken & Protein Perceptions & Preferences

64%

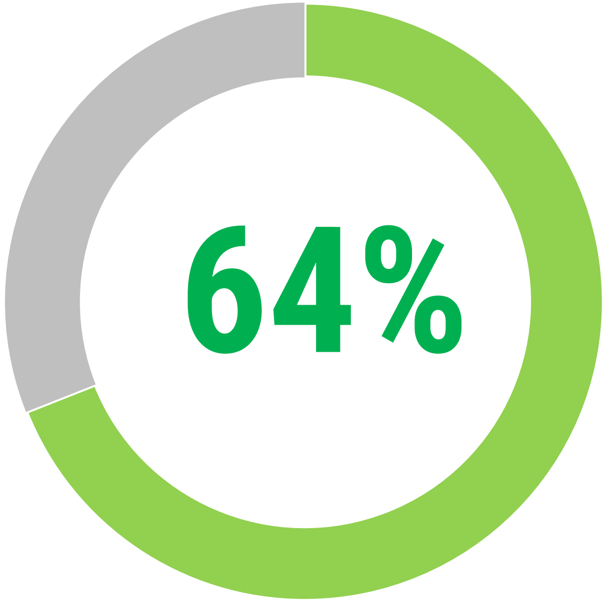
of fresh chicken buyers feel **fresh meat is the best source of protein**

(**up 3%** vs last year)

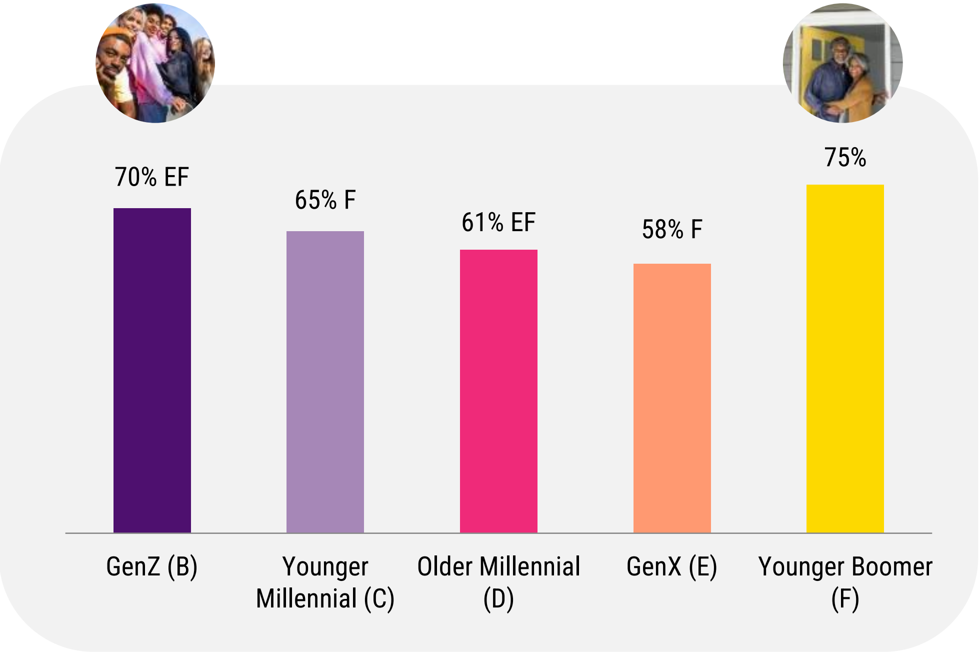


Most agree fresh meat is the best source of protein

Gen Z and Younger Boomers lead fresh meat preference



Fresh Meat as protein source preference is strong **across generations**



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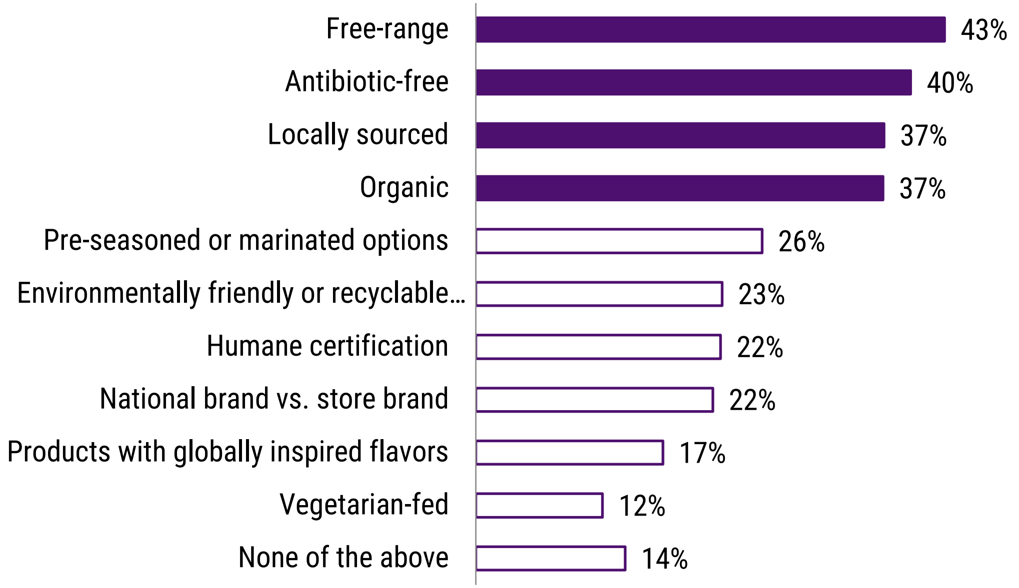
B/C/D/E/F indicate significant differences at 90% confidence level.

Q5: Which of the following statements do you strongly agree with when it comes to protein? → Fresh meat (chicken, beef, fish, etc.) is the best source of whole protein

Willingness to pay more is highest for natural and locally sourced chicken attributes

Millennials are most likely to be willing to pay more for these benefits

Fresh Chicken - Willing to Pay More For



	Gen Z (B) N=73	Younger Millennial (C) N=77	Older Millennial (D) N=127	Gen X (E) N=133	Younger Boomers (F) N=125
Free-range	28%	42%	48%	42%	36%
Antibiotic-free	39%	37%	52%	36%	39%
Locally sourced	41%	45%	41%	32%	36%
Organic	41%	48%	52%	31%	21%
Pre-seasoned or marinated options	39%	26%	28%	26%	19%
Environmentally friendly or recyclable…	36%	28%	26%	21%	17%
Humane certification	18%	21%	30%	24%	16%
National brand vs. store brand	24%	18%	24%	22%	19%
Products with globally inspired flavors	26%	22%	21%	17%	7%
Vegetarian-fed	7%	16%	20%	8%	5%
None of the above	5%	9%	8%	17%	21%

Higher within Cohort

Lower within Cohort

Total Buyers N=535

Q4: When purchasing fresh, raw chicken, which of the following, if any, would you be willing to pay more for?

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Protein sources where Gen Z's preference is higher than General Population's:

46%

Protein snacks (meat sticks, protein chips, etc.) are a convenient way for me to consume protein

34%

36%

When it comes to protein, **frozen options** (chicken, beef, fish, etc.) are just as good as fresh meat

31%

41%

When it comes to protein, **packaged options** (bacon, patties etc.) are just as good as fresh meat

26%

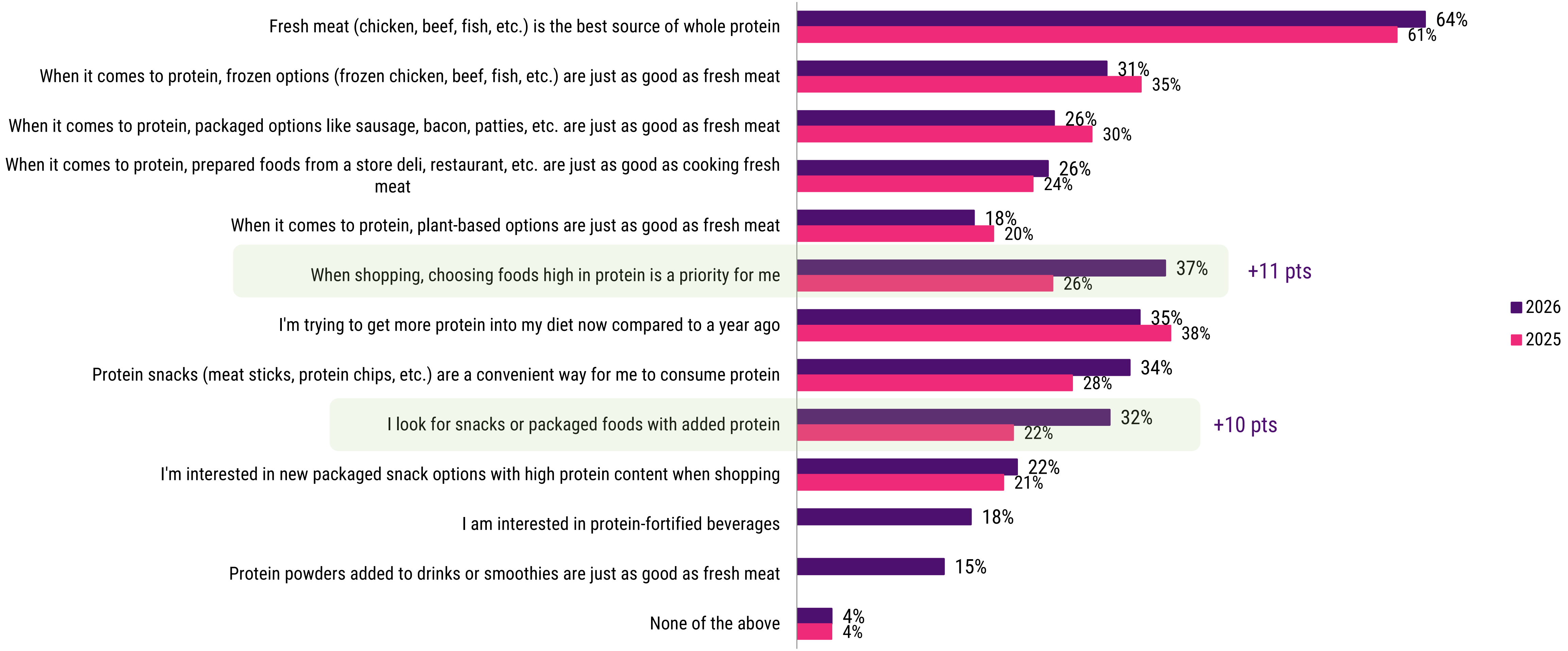
Gen Z

All Respondents

Q5: Which of the following statements do you strongly agree with when it comes to protein?

Prioritization of high protein content + interest in protein added snacks increased double digits vs. last year's survey.

2025-2026

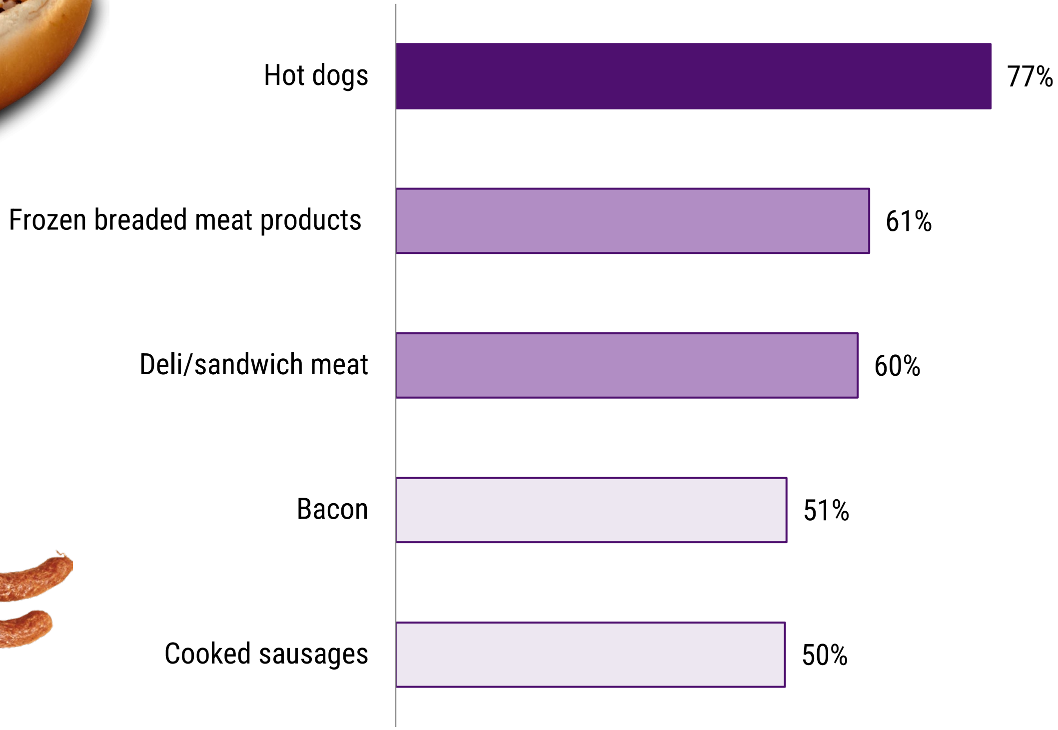


Q: Which of the following statements do you strongly agree with when it comes to protein?

Health Perceptions & Behavior Changes

Hot dogs top ultra-processed perceptions; frozen breaded meat products and deli/sandwich meat take the #2 & #3 spots

Top Highly/Ultra-Processed Foods



Total Buyers N=535

Q8: Highly processed or ultra-processed foods tend to include ingredients and additives not generally used in home cooking and are thought to be less healthy to consume than minimally processed foods. Please select all foods in this list that you think are highly or ultra processed?

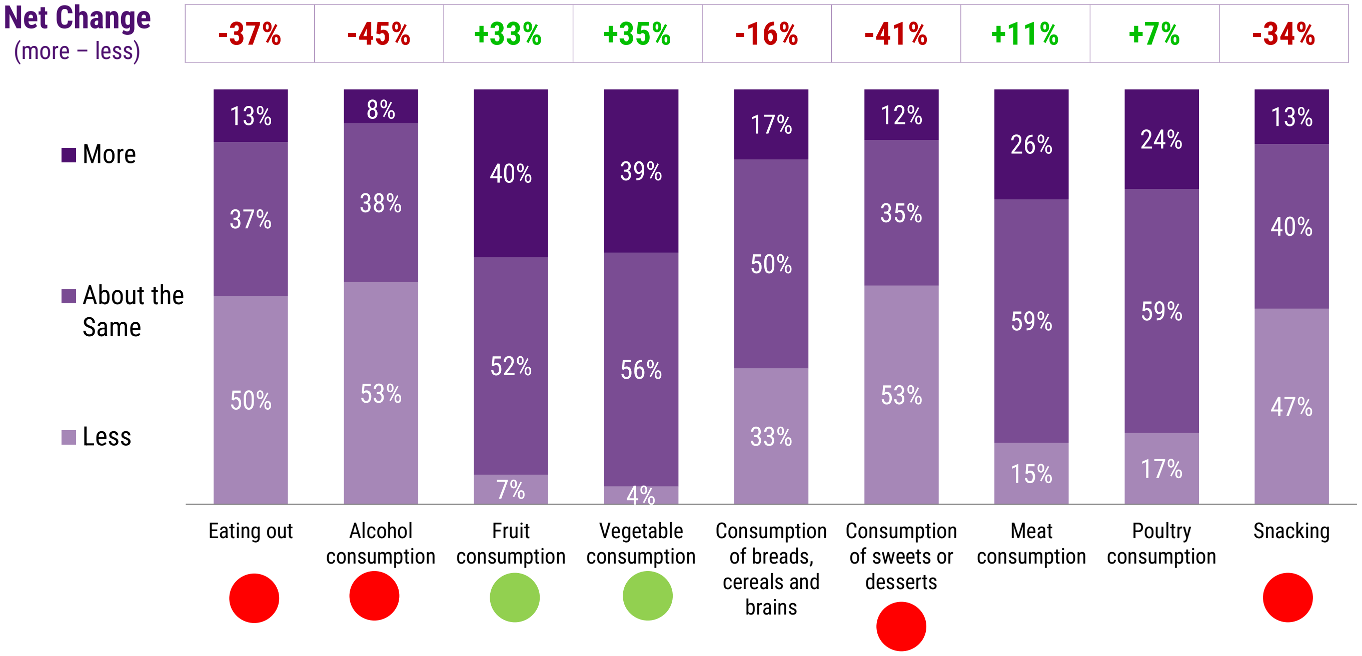
GLP-1 use more than doubled (was 12%) in 2 years. Those who use prefer healthy options for food; the impact is staggering.

27%

Of respondents or members of their HH have used a GLP-1 medication

Total Buyers N=535

GLP-1 Usage And Change In Habits

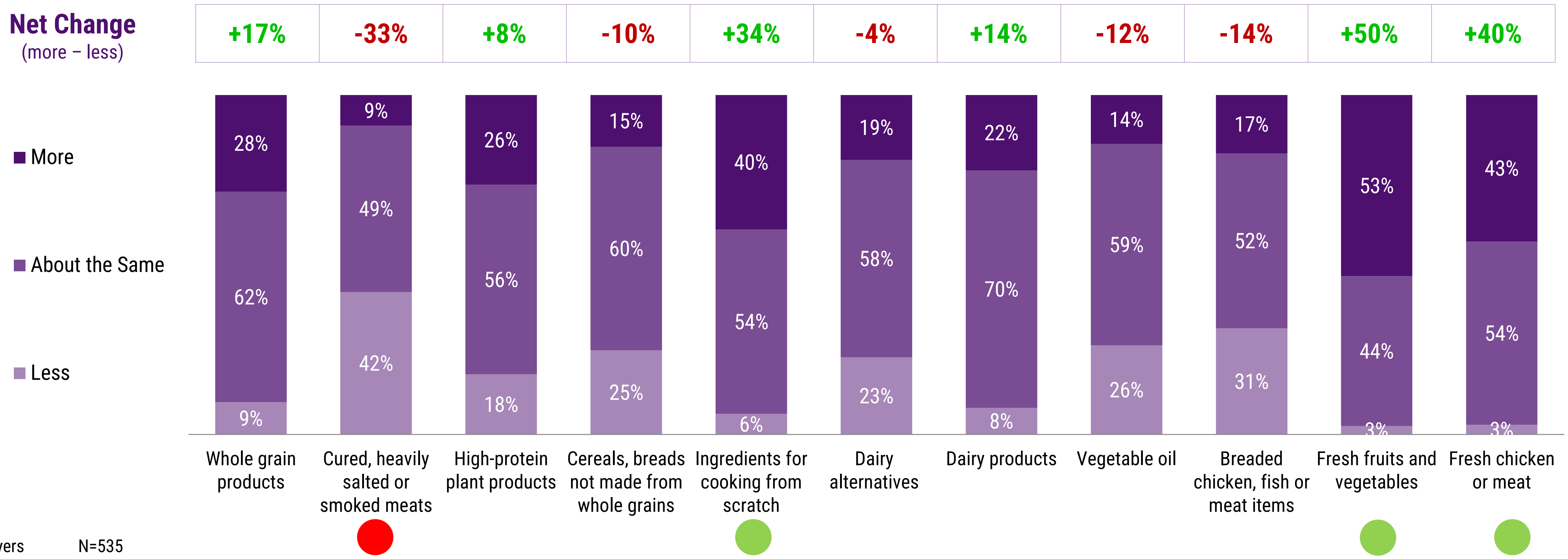


Used GLP-1 Medication N=107

Q6: Which of the following best describes GLP-1 medication use in your household?
Q7: You mentioned that you or a member of your household has used a GLP-1 in the past 12 months. Thinking specifically about GLP-1 use (and not other factors), what impact, if any, has it had on the following?

Consumers are shifting toward protein, fresh foods and cooking from scratch.

Change In Habits



Total Buyers N=535

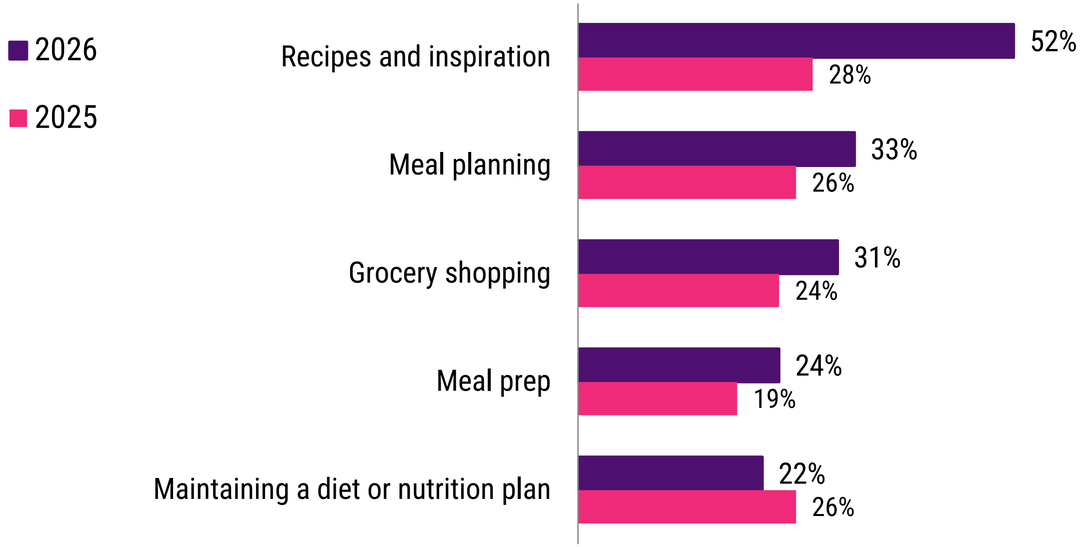
Q9: The new Dietary Guidelines for Americans recommends eating minimally processed nutrient dense foods, including meats, dairy, vegetables, fruits, healthy fats and whole grains. How have your purchases of the following products changed?

AI: The Difference One Year Makes

Lef by younger consumers AI usage increased across the board

More than half od the respondents and two-thirds of Gen Z are using AI for recipes

AI Usage



Gen Z (B) *N=73*	Younger Millennial (C) *N=77*	Older Millennial (D) *N=127*	Gen X (E) *N=133*	Younger Boomers (F) *N=125*
65%	56%	55%	50%	43%
41%	40%	44%	32%	13%
31%	35%	41%	29%	19%
34%	38%	34%	16%	8%
29%	33%	25%	21%	11%

Higher within Cohort

Lower within Cohort

Q3: Which of the following, if any, do you use AI tools for?

2025 & 2026 Chicken Marketing Summit Survey

Summary of Findings

Grocery Shopping & Meal Preparation

Time-savings remains a leading priority, with fast prep and pre-cut ingredients most valued. At the same time, 6 in 10 shoppers **purchase groceries online**, with adoption highest among younger consumers.

Fresh Chicken Perceptions & Preferences

The majority (64%) believe **fresh meat is the best source of protein**. Shoppers are willing to pay more for **free-range, antibiotic-free, and locally sourced chicken**, with stronger interest among Millennials.

Health Perceptions & Behavior Changes

Consumers widely associate processed meats with being less healthy, especially **hot dogs** and **frozen breaded meat products**. In response to increased GLP-1 use and new dietary guidance, many report increased purchases of **fresh foods and more cooking from scratch**.

Technology & Emerging Influences

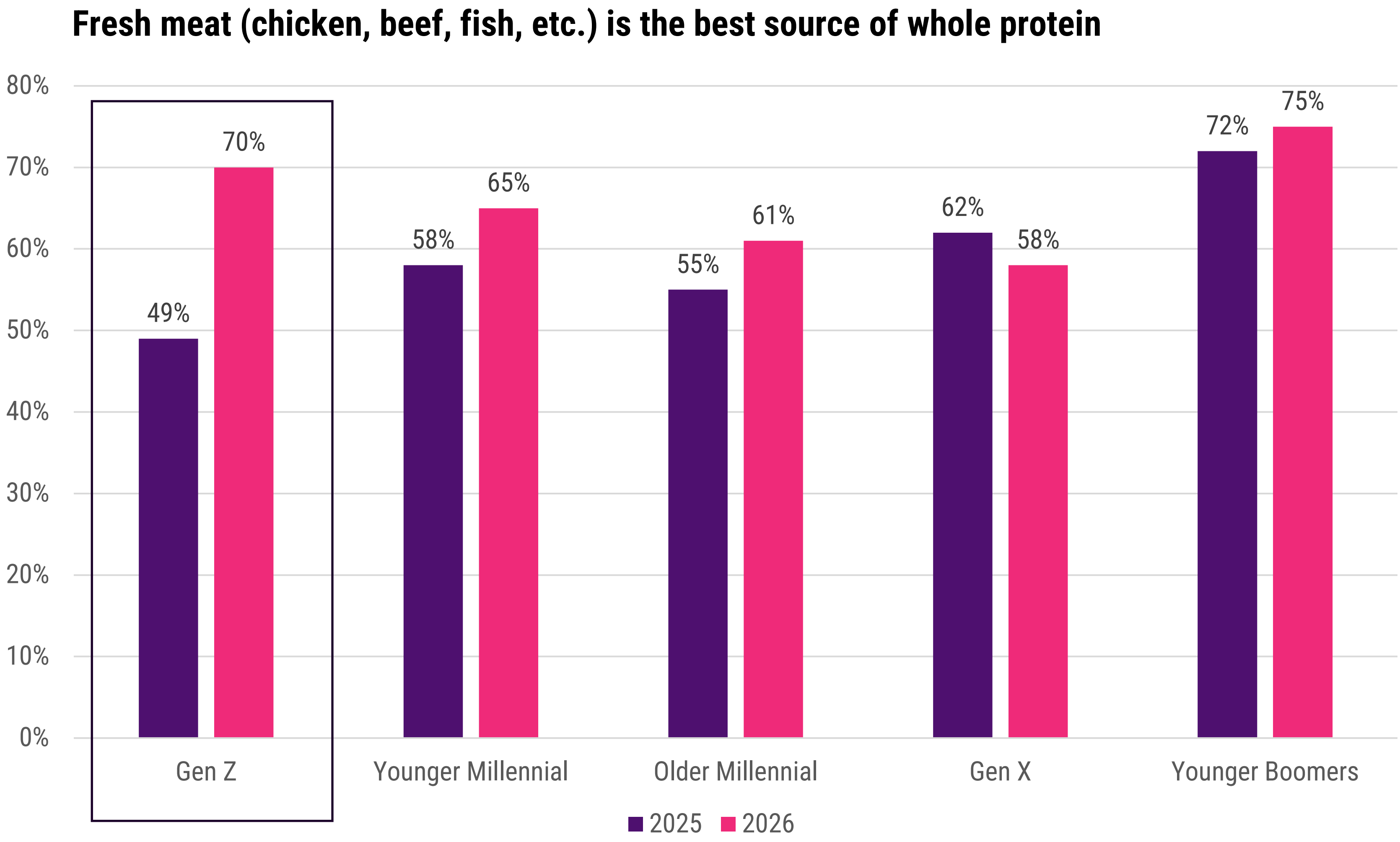
Over half of consumers use AI tools for **recipes and meal inspiration**, particularly younger cohorts.

27% report household **GLP-1 use**, which is linked to **reduced snacking**, **eating out**, and **alcohol consumption**, and **increased fruit and vegetable intake**.

Appendix 1: Generational Breakdowns

Which of the following statements do you strongly agree with when it comes to protein?

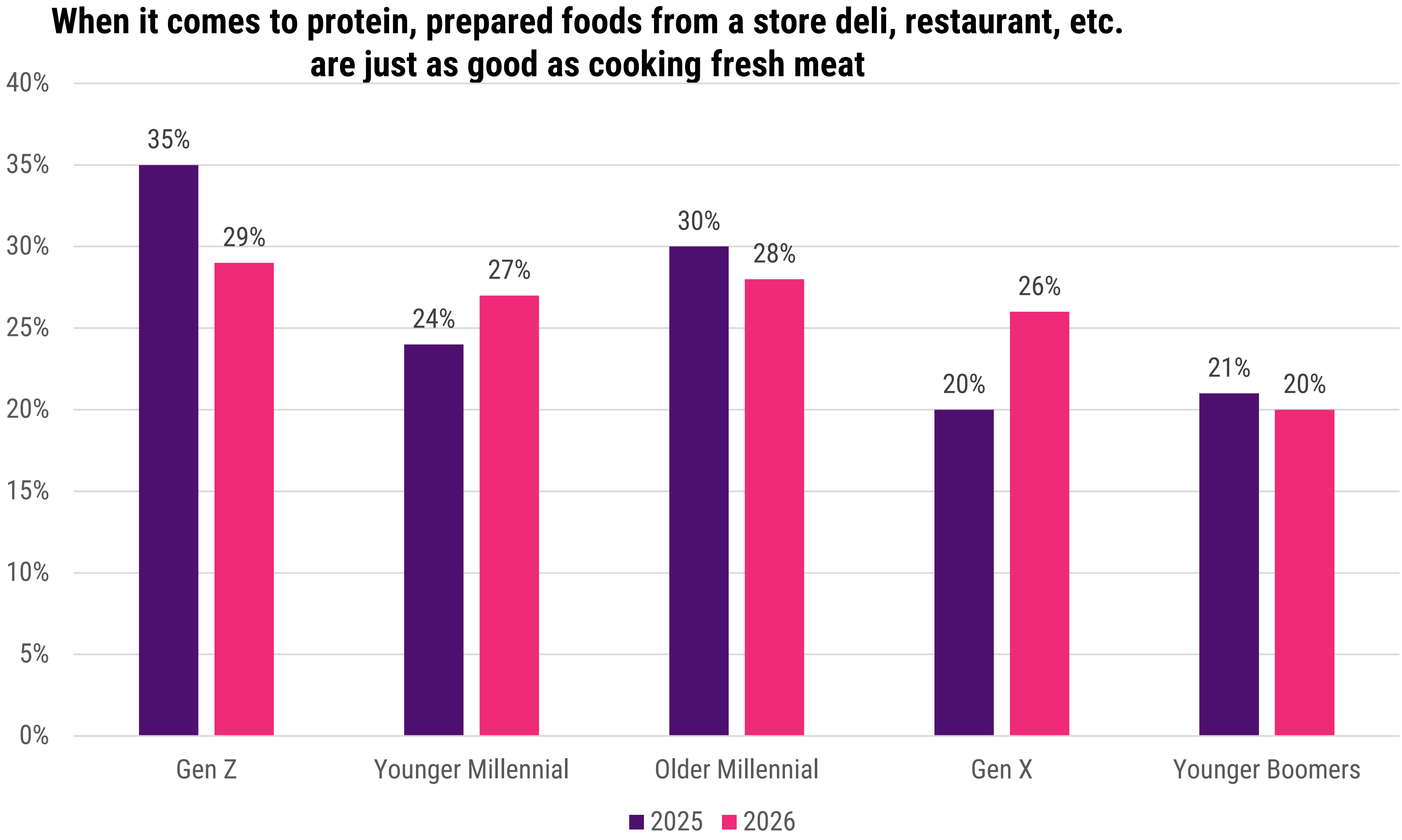
2025-2026



National Chicken Council Survey 2025-2026

Which of the following statements do you strongly agree with when it comes to protein?

2025-2026



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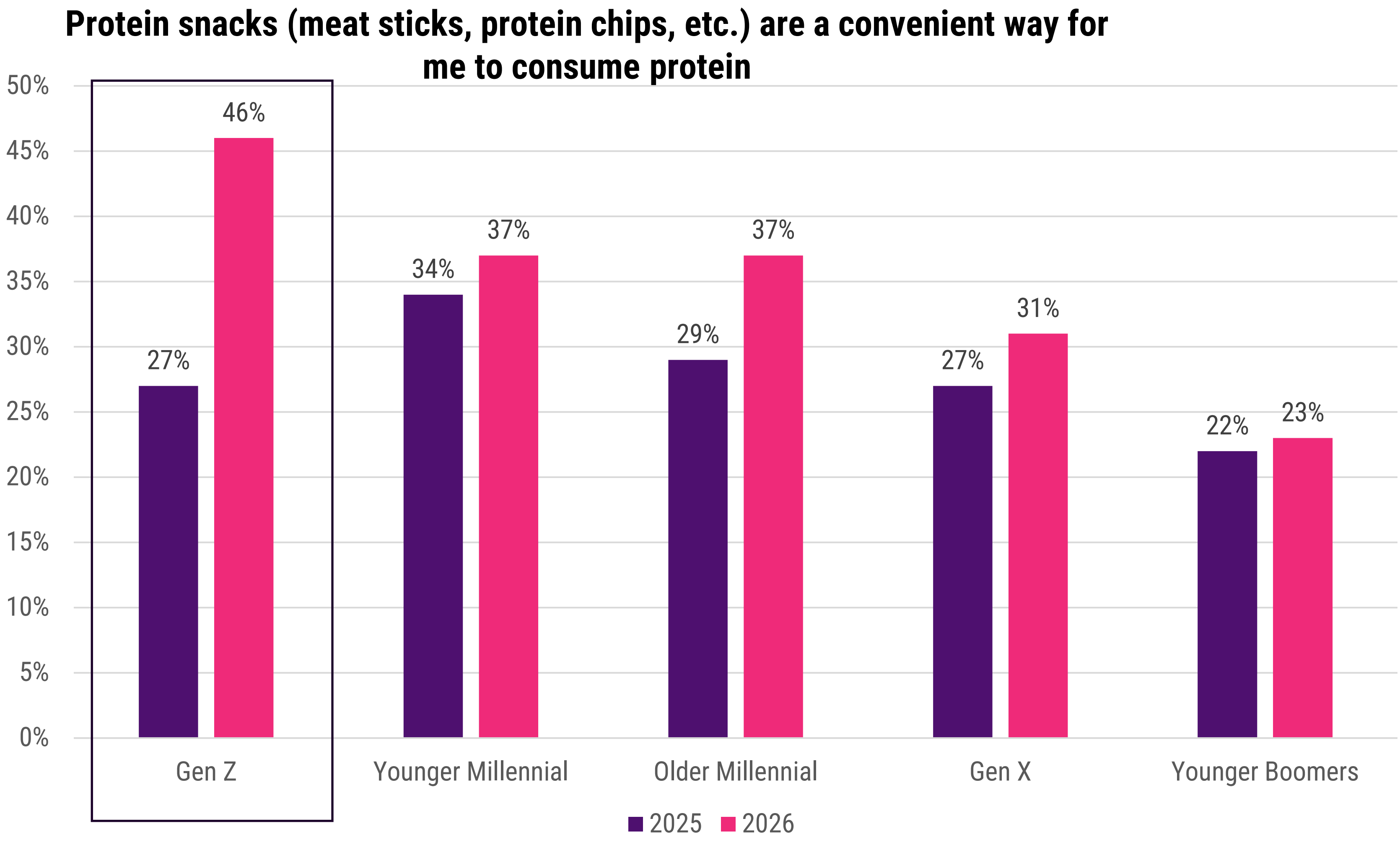
2025-2026



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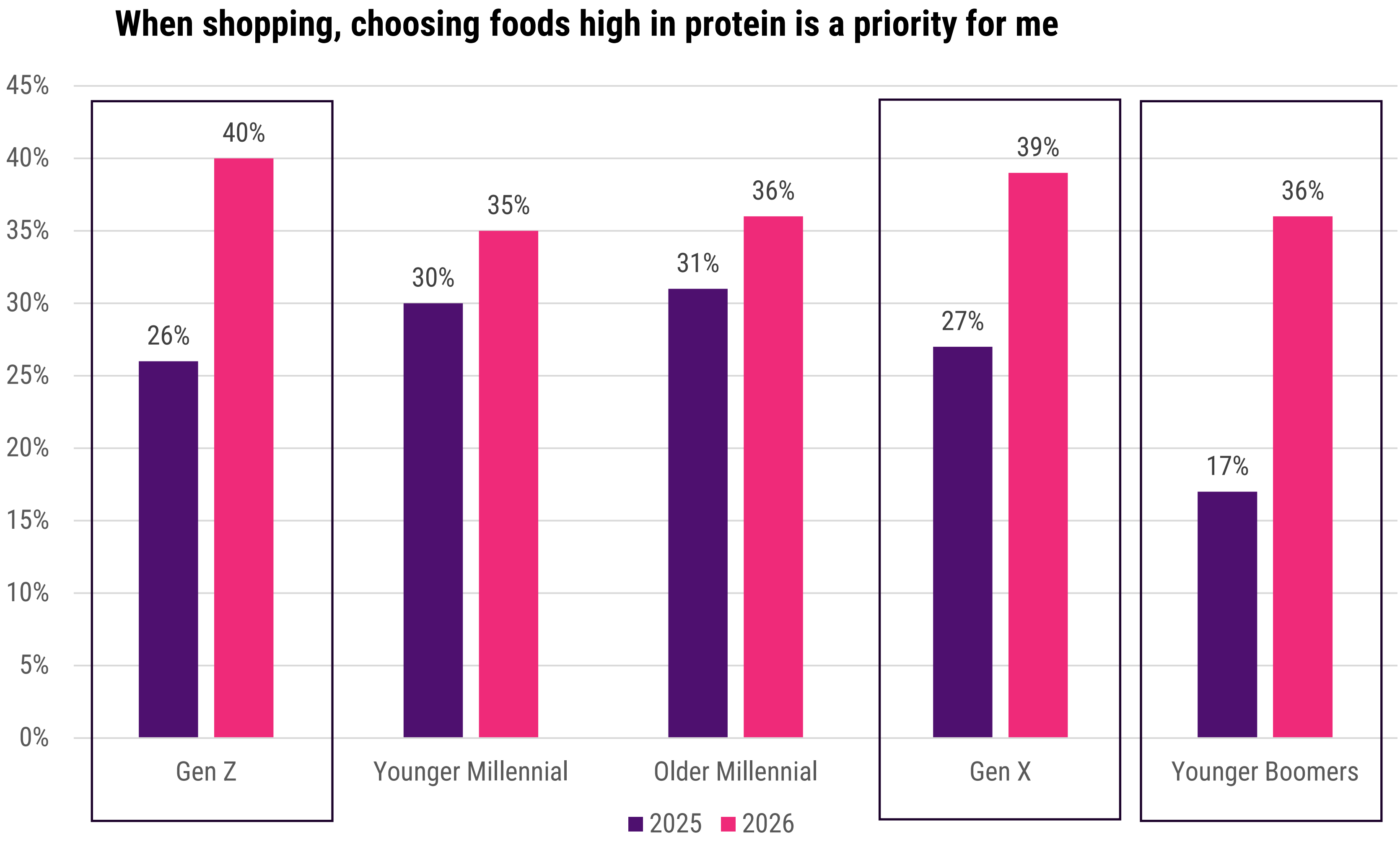
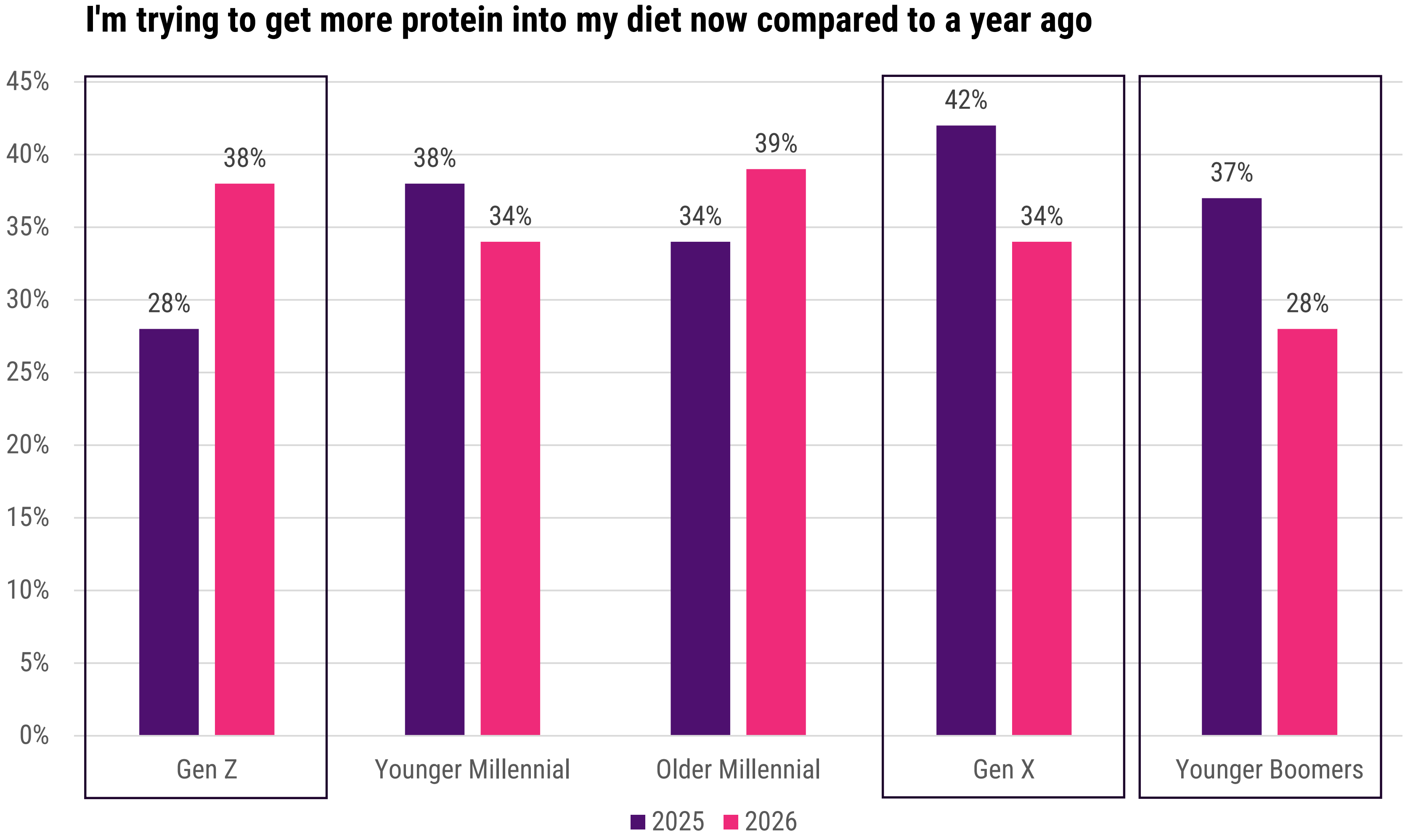
2025-2026



Which of the following statements do you strongly agree with when it comes to protein?

2025-2026



National Chicken Council Survey 2025-2026

Appendix 2: Survey Demographics

Demographics

	Total N=535	Gen Z N=73	Younger Millennial N=77	Older Millennial n=127	Gen X N=133	Younger Boomers n=125
GENDER						
Male	**52%**	41%	43%	63%	64%	29%
Female	**48%**	58%	57%	37%	36%	71%
Gender Non-Binary/Fluid	**0%**	1%	0%	0%	0%	0%
AGE						
18-34	**22%**	100%	87%	0%	0%	0%
35-44	**23%**	0%	13%	100%	0%	0%
45-54	**22%**	0%	0%	0%	65%	0%
55-64	**20%**	0%	0%	0%	35%	39%
65+	**13%**	0%	0%	0%	0%	61%
GENERATION						
Gen Z	**6%**	100%	0%	0%	0%	0%
Younger Millennial	**19%**	0%	100%	0%	0%	0%
Older Millennial	**20%**	0%	0%	100%	0%	0%
Gen X	**34%**	0%	0%	0%	100%	0%
Younger Boomers	**21%**	0%	0%	0%	0%	100%

	Total N=535	Gen Z N=73	Younger Millennial N=77	Older Millennial n=127	Gen X N=133	Younger Boomers n=125
HOUSEHOLD INCOME						
Less than $25,000	13%	15%	16%	15%	12%	15%
$25,000 to $49,999	21%	27%	19%	23%	19%	23%
$50,000 to $69,999	18%	23%	23%	17%	13%	17%
$70,000 to $99,999	19%	20%	16%	19%	20%	19%
$100,000 to $129,999	11%	8%	13%	8%	11%	8%
$130,000 or more	18%	7%	13%	18%	25%	18%
Average	**$ 75,200**	**$ 62,150**	**$ 70,330**	**$ 72,150**	**$ 82,330**	**$ 72,150**
HOUSEHOLD SIZE						
1	19%	16%	14%	17%	19%	29%
2	31%	24%	21%	25%	28%	51%
3	18%	22%	26%	18%	18%	11%
4	21%	17%	31%	23%	22%	9%
5 or more	11%	21%	8%	17%	13%	1%
Average	2.77	3.21	2.98	3.05	2.89	2.03

Demographics

	Total N=535	Gen Z N=73	Younger Millennial N=77	Older Millennial n=127	Gen X N=133	Younger Boomers n=125
PRESENCE OF CHILDREN						
Yes	36%	30%	47%	58%	35%	4%
No	64%	70%	53%	42%	65%	96%
AGE OF CHILDREN IN HH						
6-12 years old	54%	39%	54%	69%	43%	17%
13-17 years old	45%	23%	8%	49%	73%	66%
Under 6 years old	39%	67%	73%	39%	12%	17%
EDUCATION						
Grade school	0%	0%	0%	2%	0%	0%
High School (Net)	23%	33%	18%	29%	22%	20%
Some high school	3%	2%	2%	5%	5%	1%
Graduated high school	20%	31%	16%	24%	16%	19%
Some/Graduated College (Net)	77%	67%	82%	69%	78%	80%
Some college	24%	27%	23%	25%	27%	22%
Graduated college	36%	38%	43%	35%	28%	42%
Post college graduate	16%	2%	16%	9%	23%	15%

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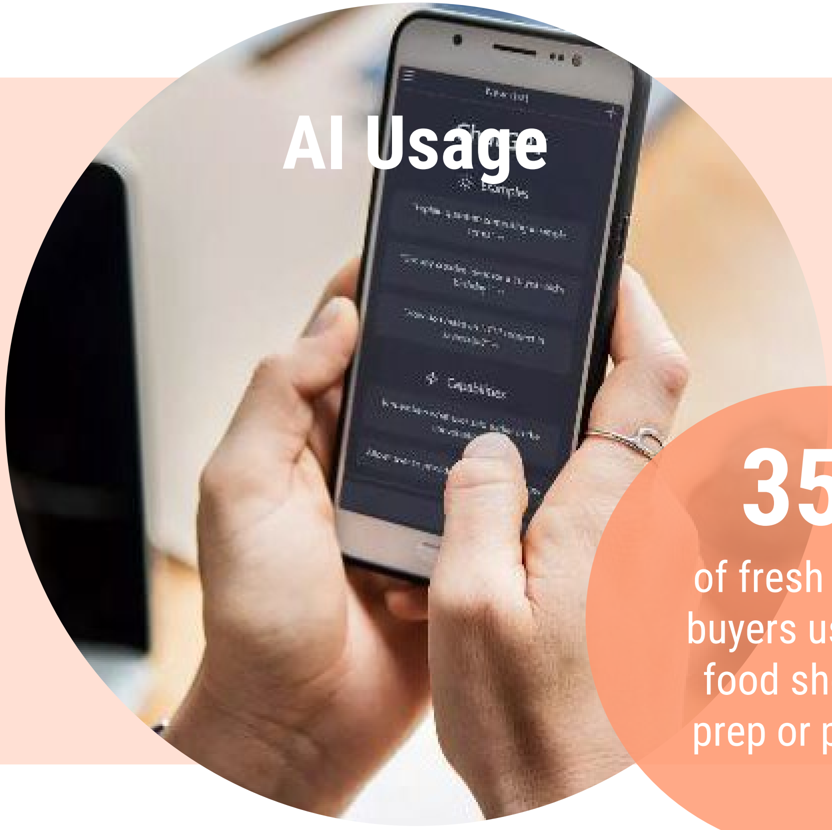
Appendix 3: Reminders from last year

Slide from 2025 presentation on AI use

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%

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

2025 Chicken Marketing Summit Survey

(From 2025 presentation)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