

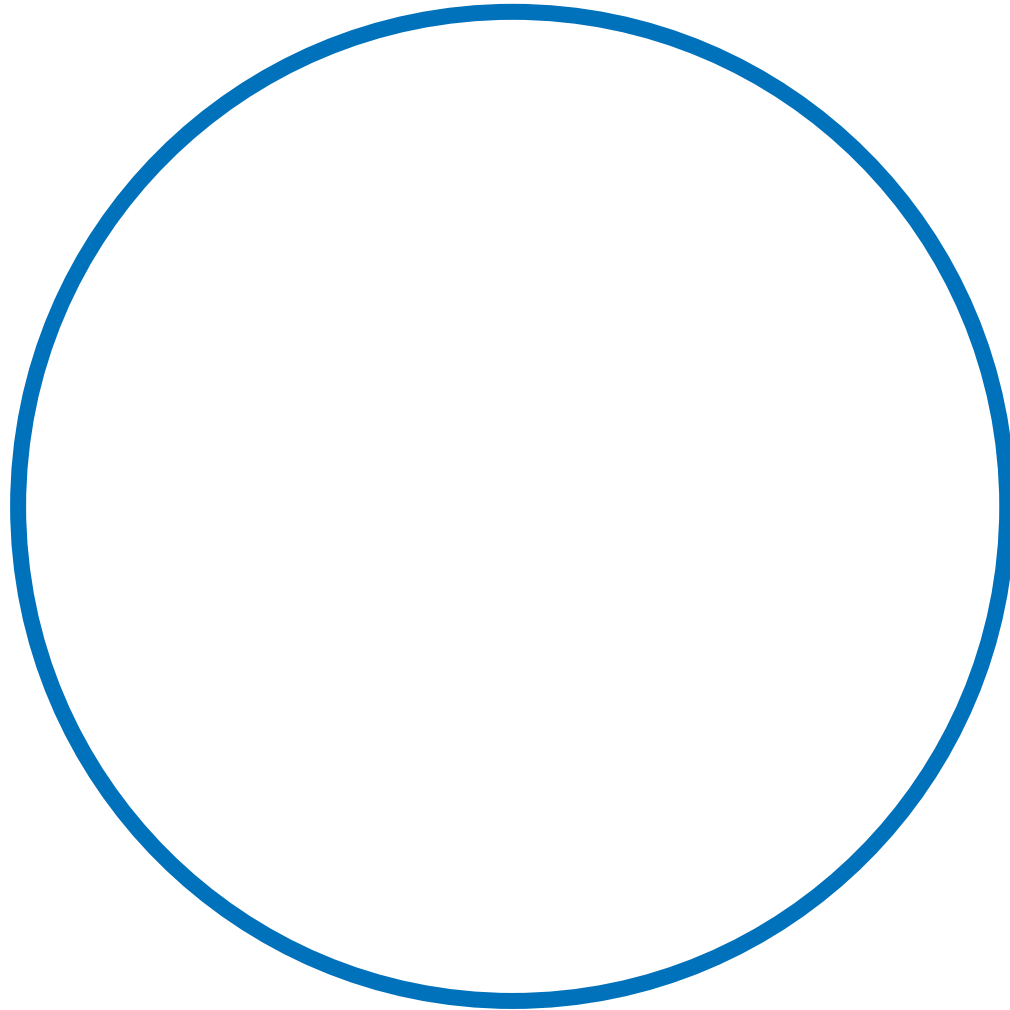


2026 Chicken Marketing Summit Survey

June 2026

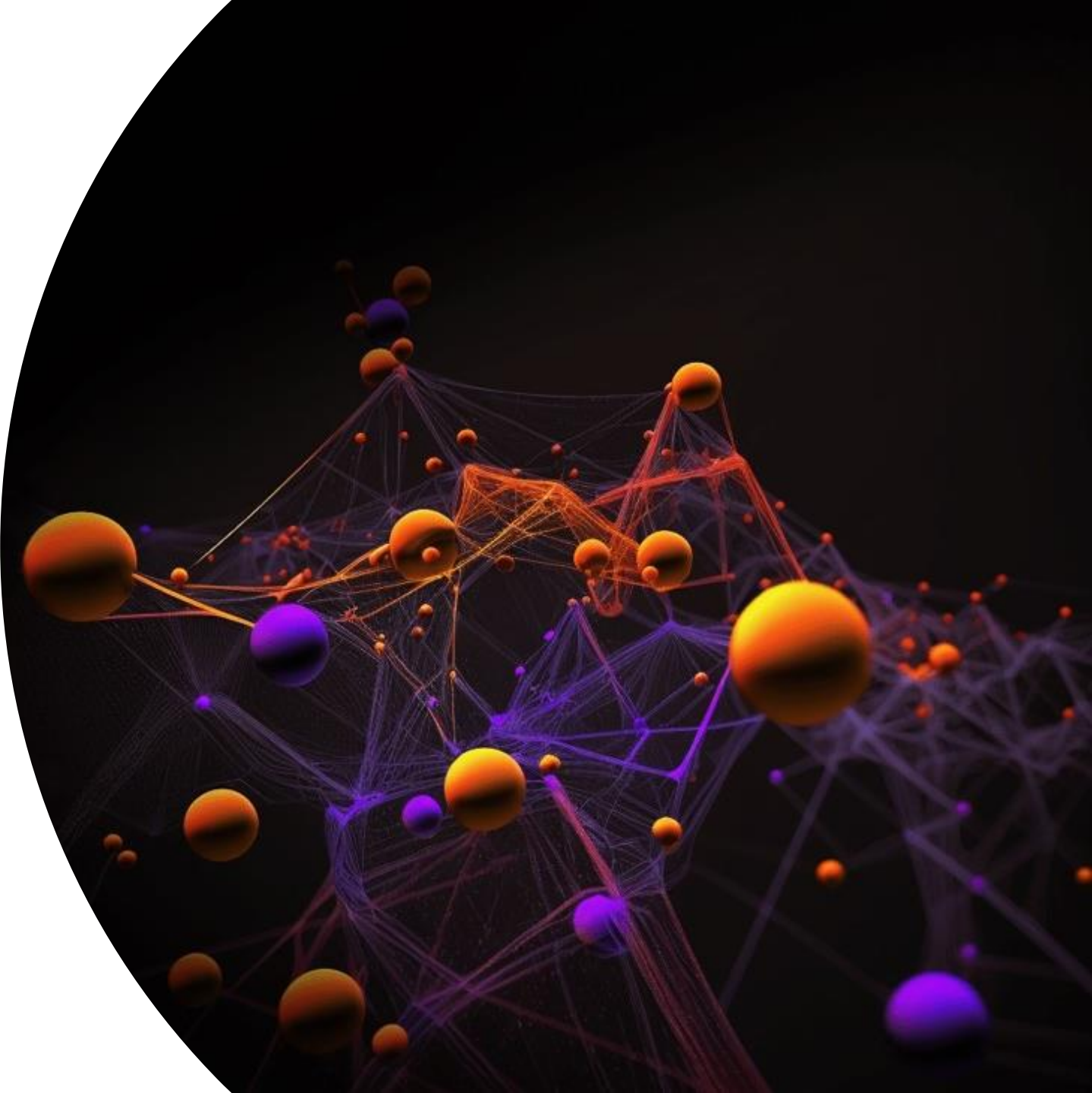


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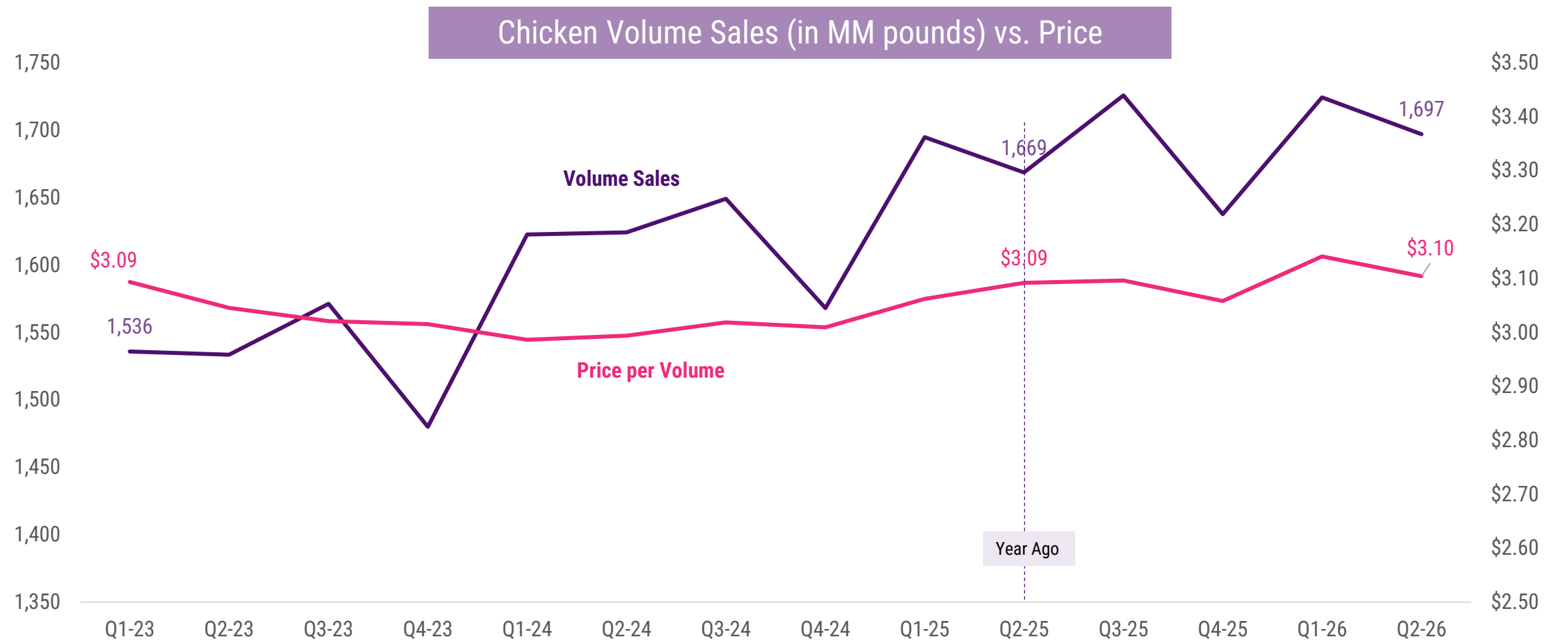
Erkin Peksoz
Principal,
Protein Practice
Circana

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- 2 Convenience in Different Forms
- 3 Chicken & Protein Perceptions/Preferences
- 4 Health Perceptions & Behavior Changes
- 5 AI: Difference One Year Makes

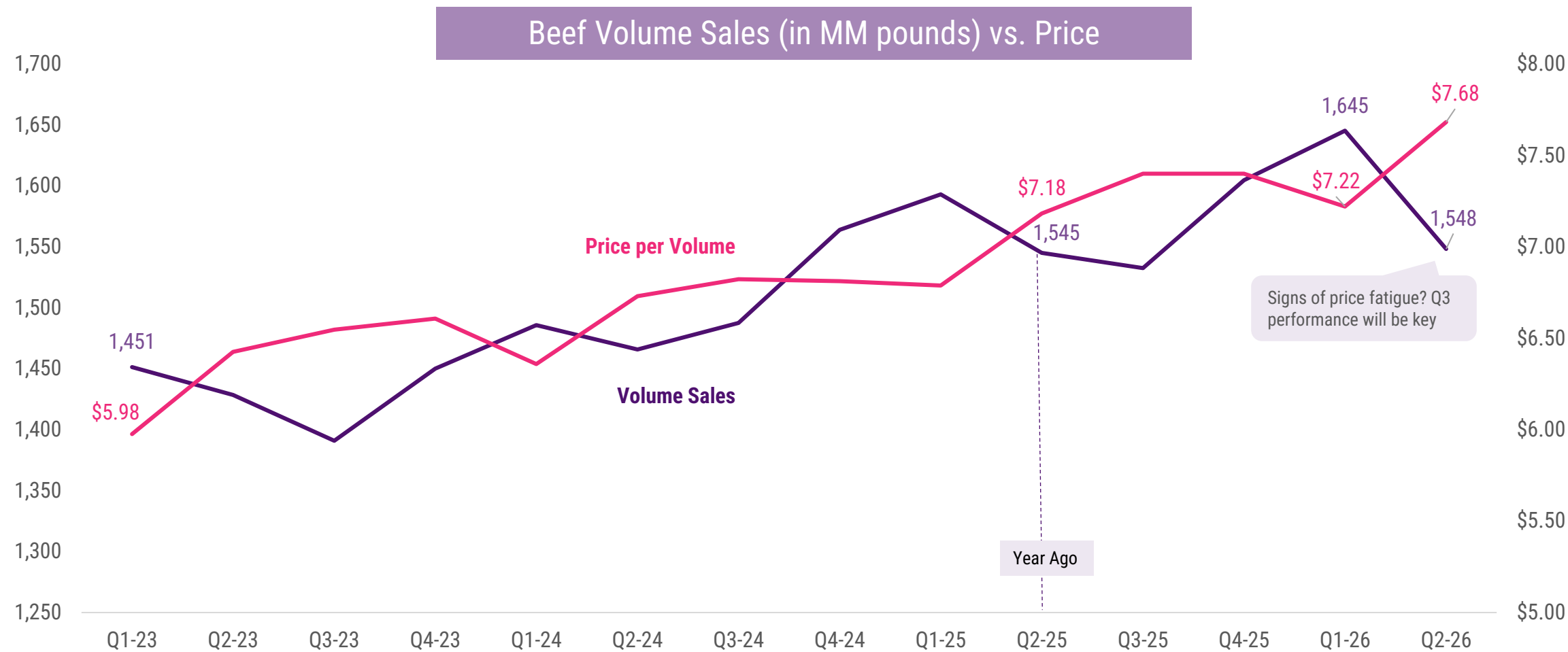


Macro Overview

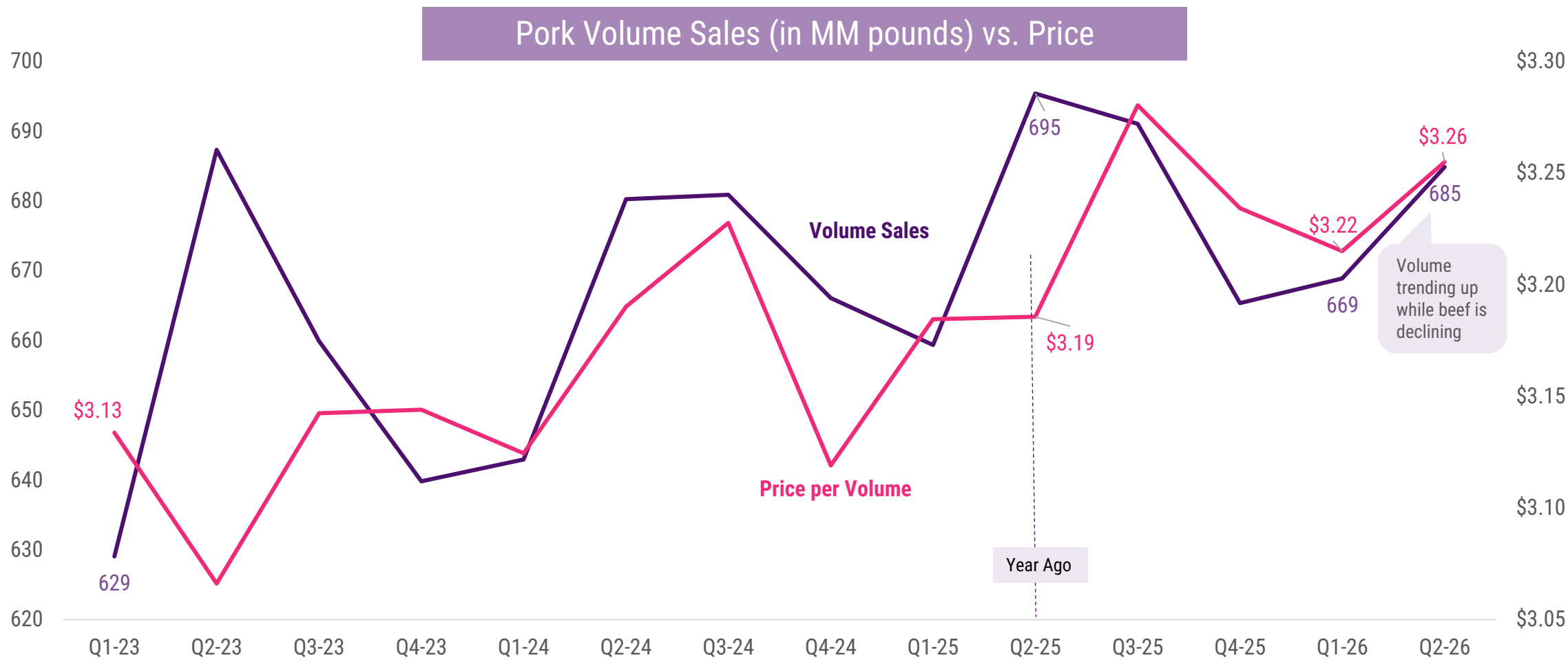
Chicken prices settled in plus \$3 territory with no negative impact to sales. Despite the recent slowdown, volume is well above 2023 levels.



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



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



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

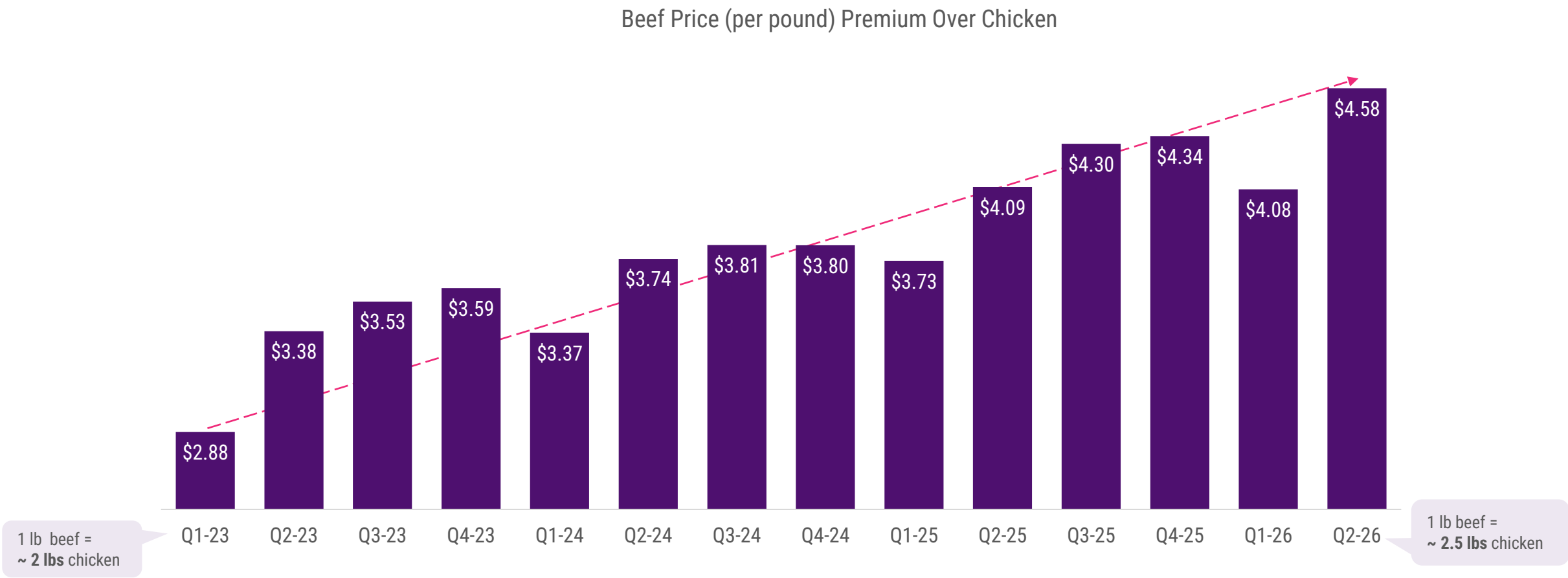
Dollars Per Buyer % Change vs. YA

						
	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

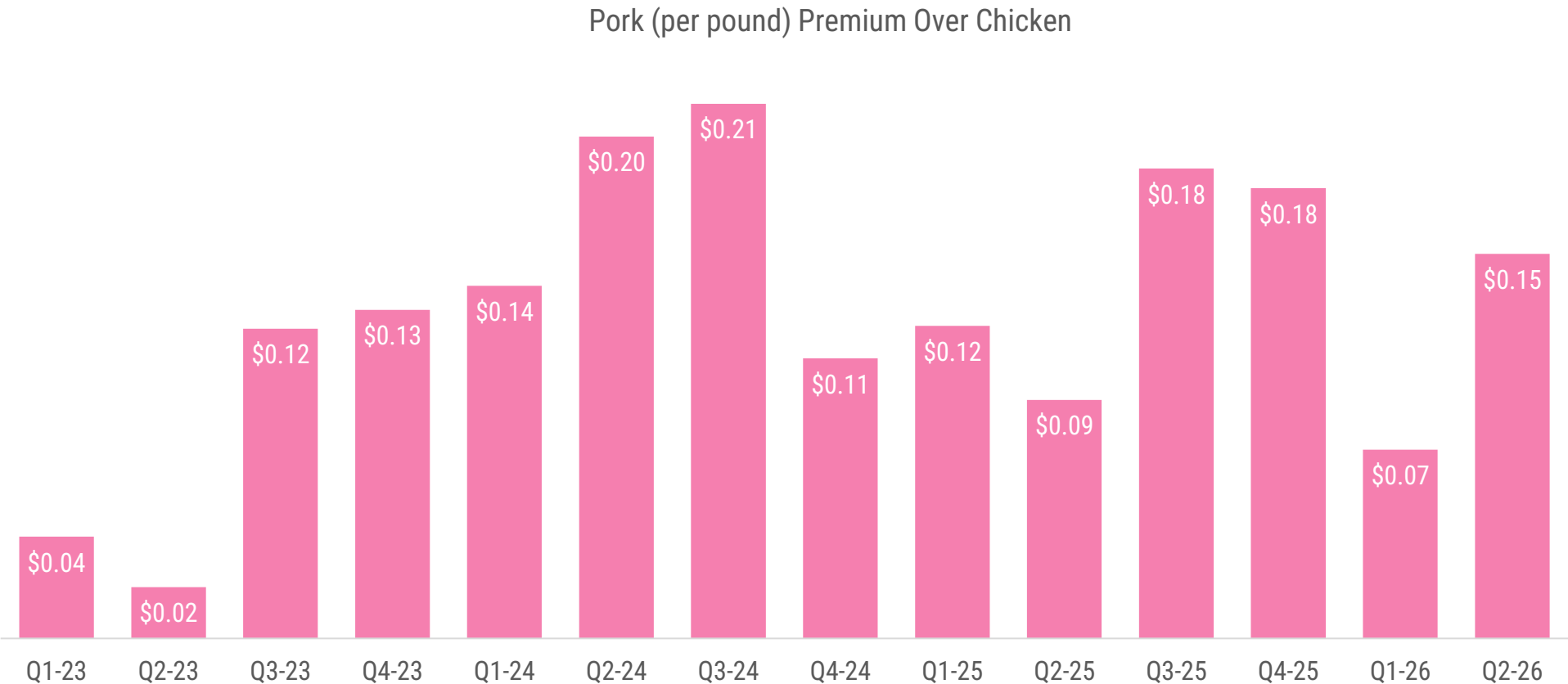
 Top Performer
 Bottom Performer

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

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



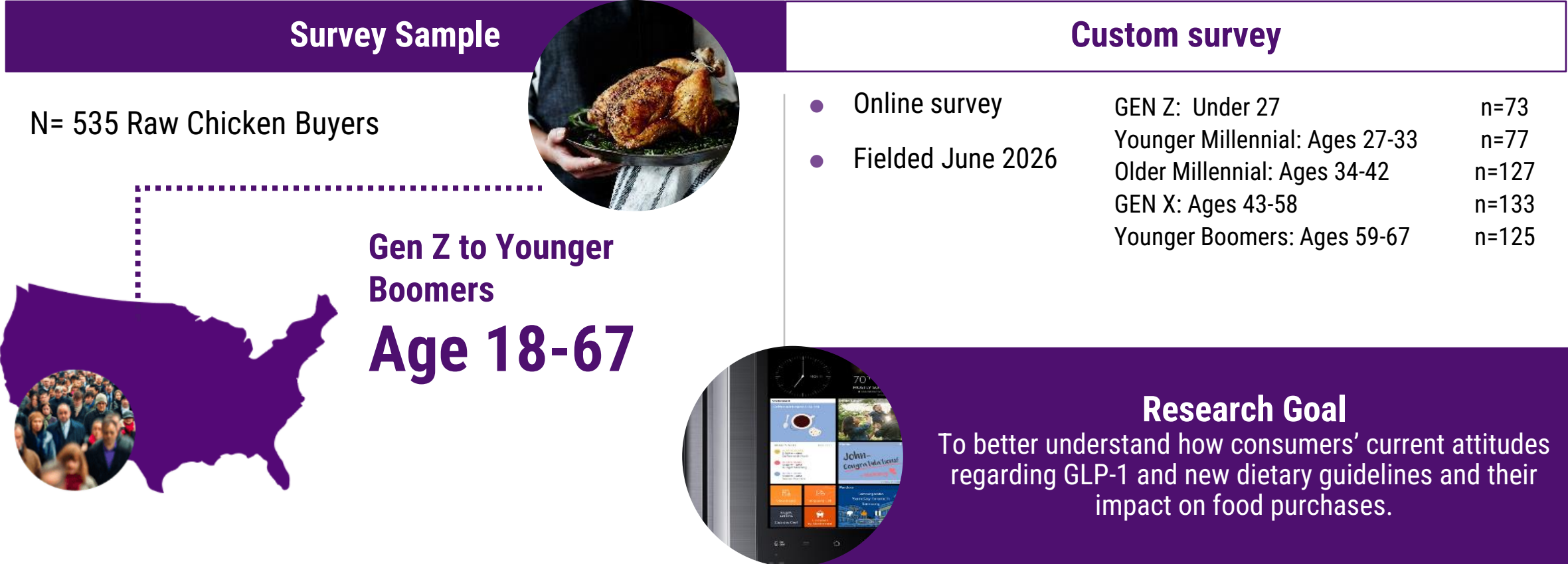
Pork prices remained consistently, albeit slightly above Chicken's





The Consumer Speaks

Survey Methodology



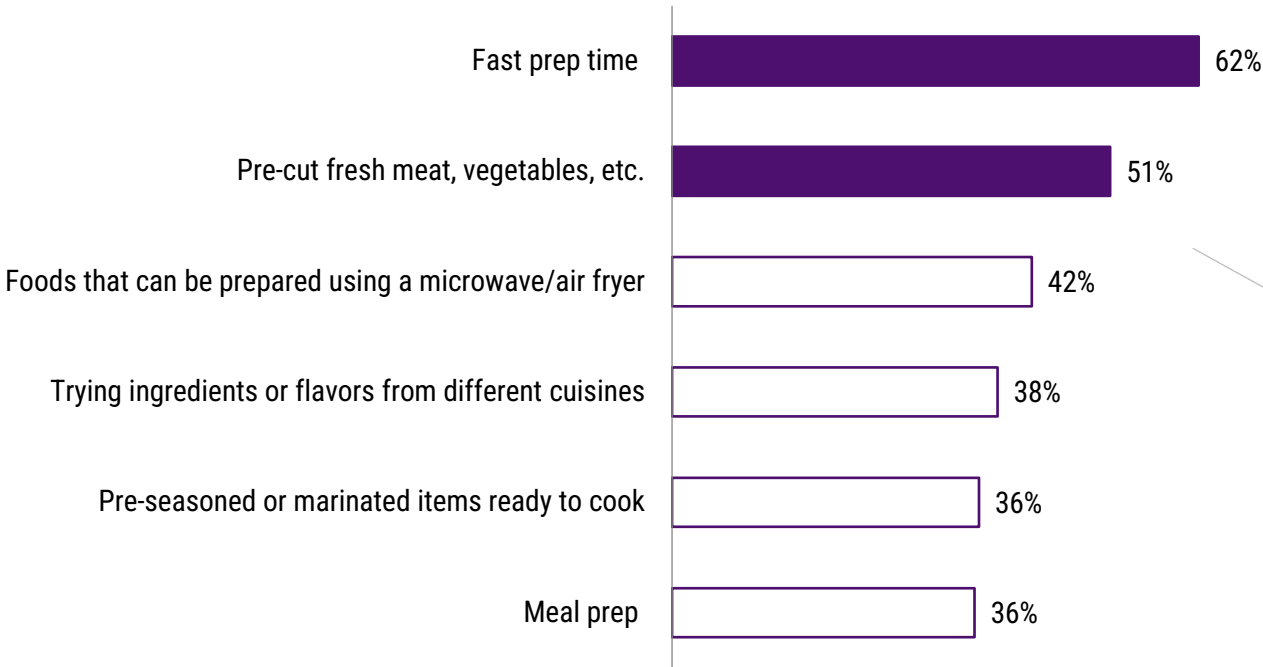
The background is a dark, abstract composition featuring a dense field of thin, flowing lines in shades of purple and magenta. These lines are interspersed with numerous small, bright orange and yellow particles, creating a sense of dynamic movement and depth. The overall effect is reminiscent of a digital or scientific visualization, such as a data stream or a microscopic view of a complex material.

Convenience in Different Forms

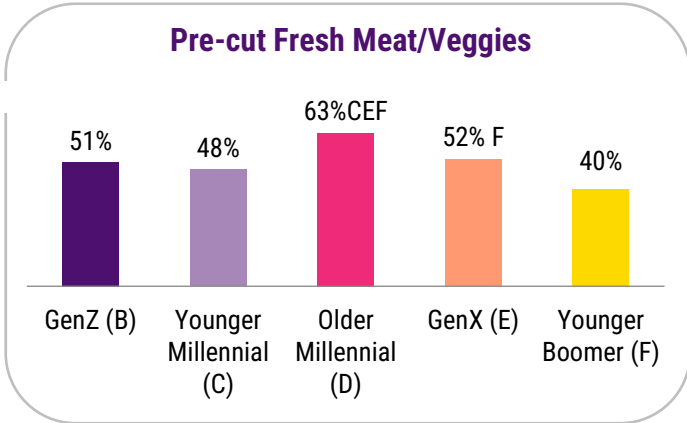
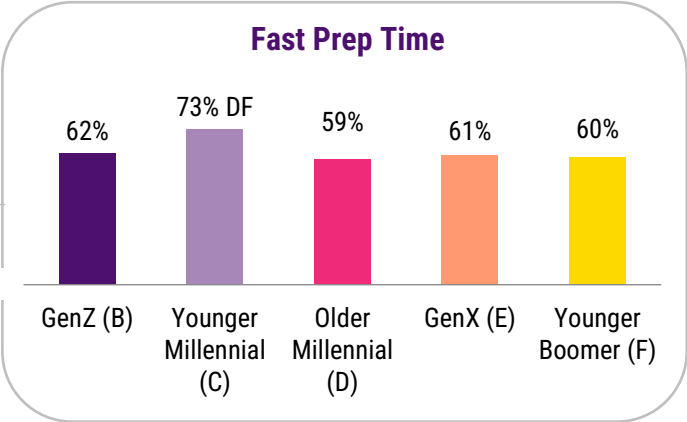
Time-saving meal prep is a top priority, led by fast prep times.

“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

National Chicken Council Survey 2026



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?

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6 in 10 buy groceries online, led by younger shoppers

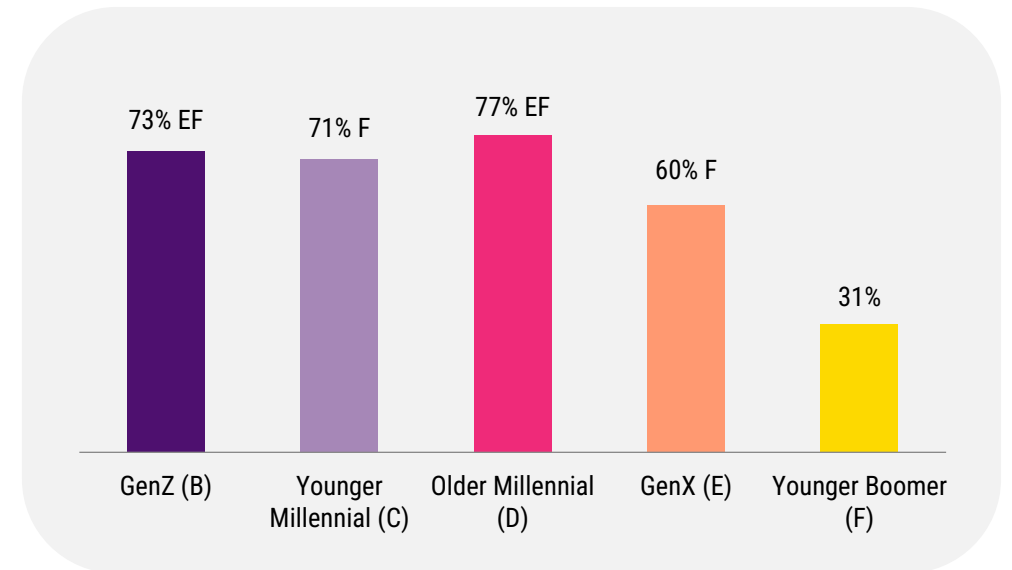
There is a steep drop off with Boomers (31%)

Online Pickup/Delivery



60%

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



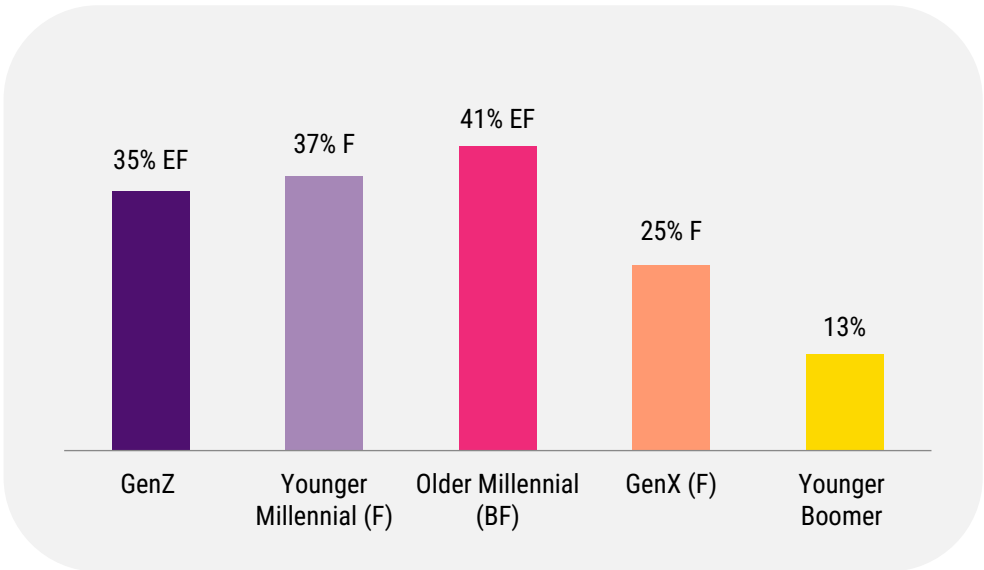
At weekly level, the younger generations continue to lead the online grocery shopping trend

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

Online Pickup/Delivery

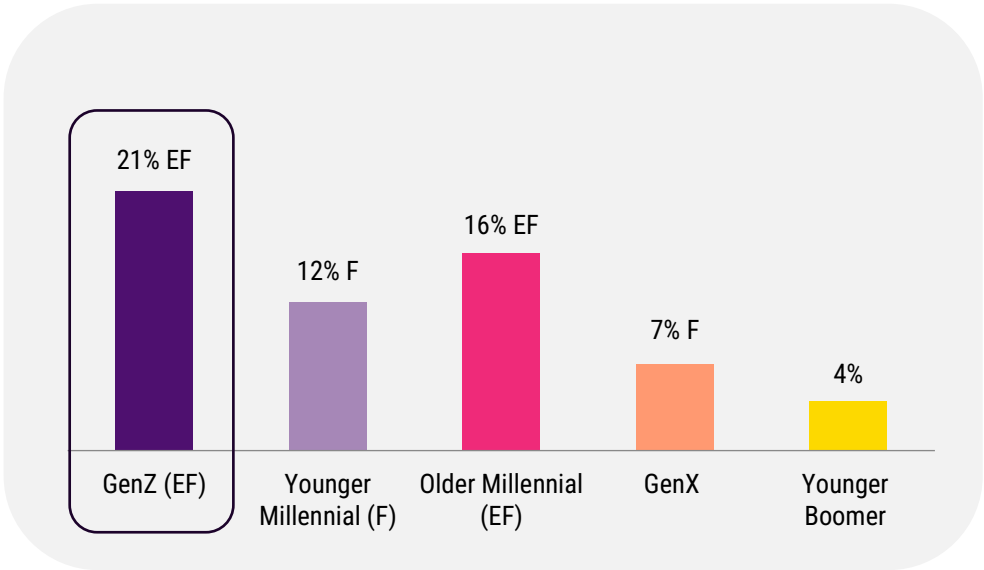
28%

Once a week or more



10%

More than once a week



Letters indicate statistically higher at the 90% confidence level



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.

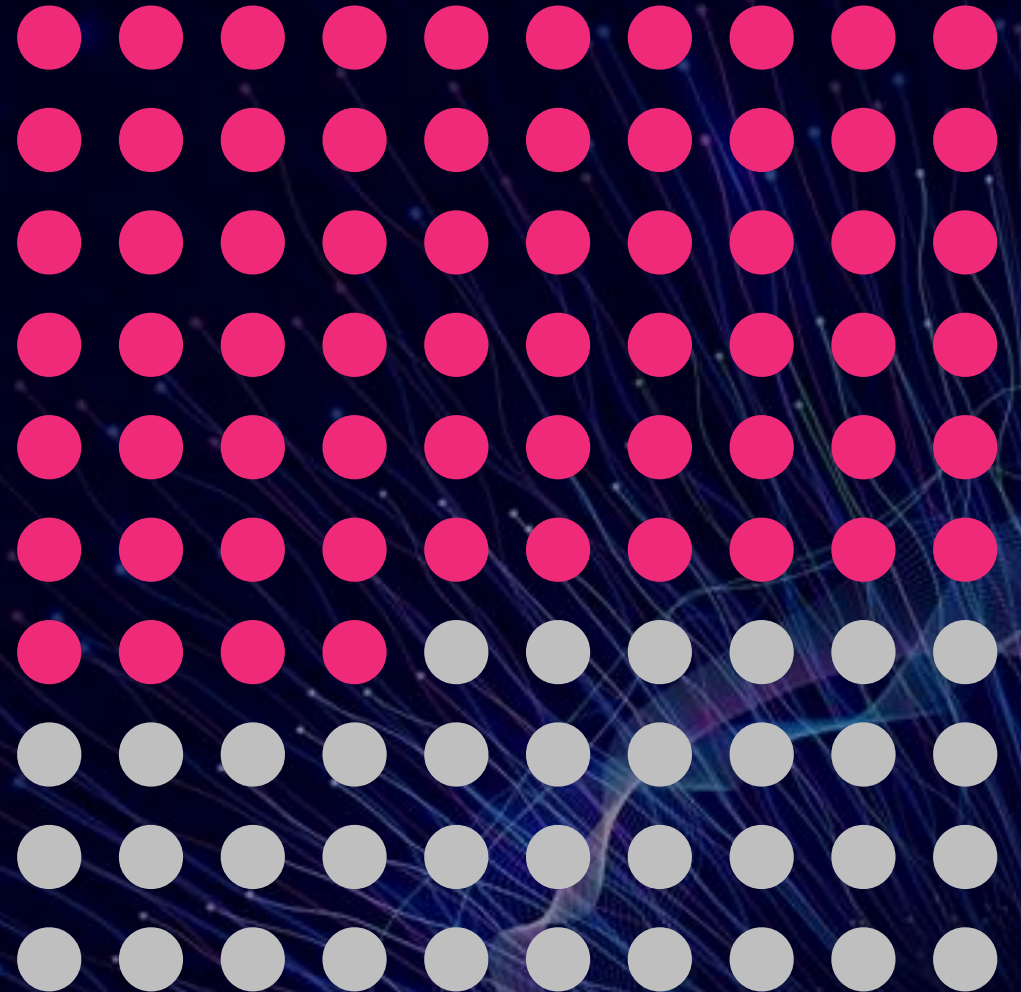
The background features a complex, abstract pattern of wavy, horizontal lines in shades of purple and magenta. Interspersed among these lines are numerous small, glowing orange and yellow particles, creating a sense of depth and movement. The overall effect is reminiscent of a digital or biological landscape.

Chicken & Protein Perceptions & Preferences

64%

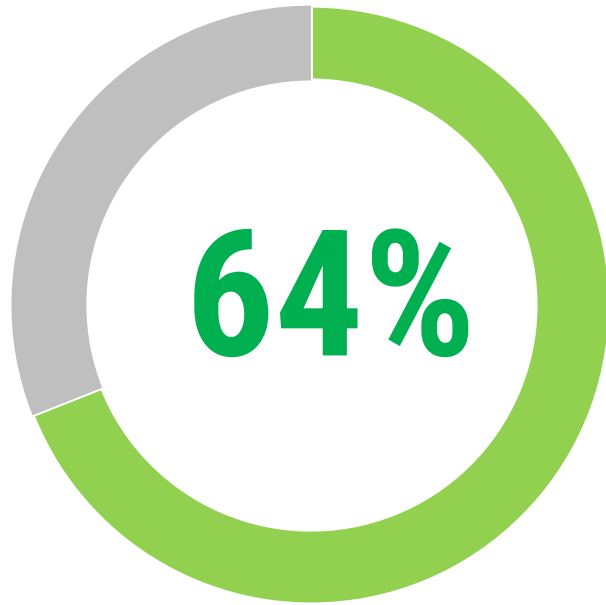
of fresh chicken buyers feel **fresh meat is the best source of protein**

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

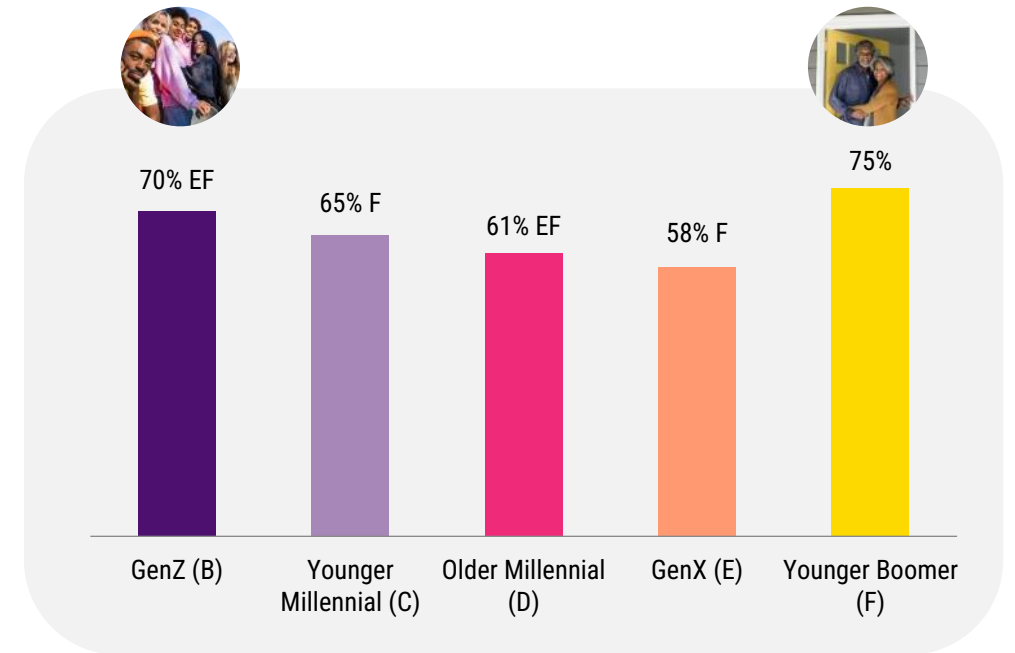


Most agree fresh meat is the best source of protein

Gen Z and Younger Boomers lead fresh meat preference

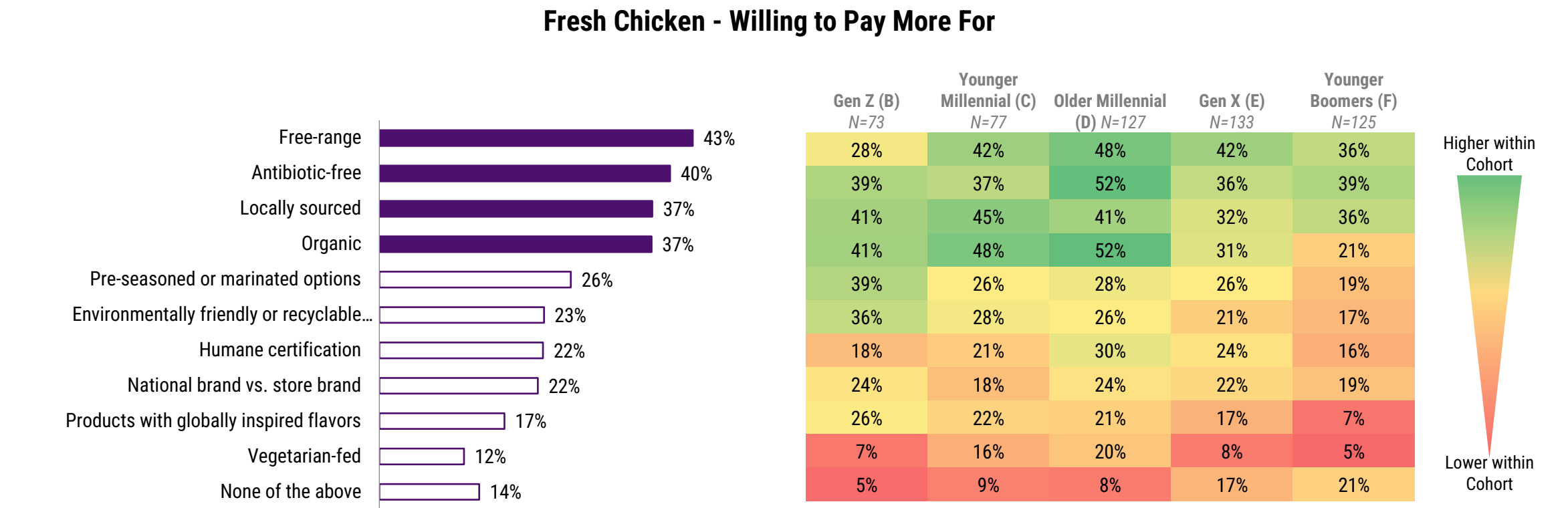


Fresh Meat as protein source preference is strong **across generations**



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

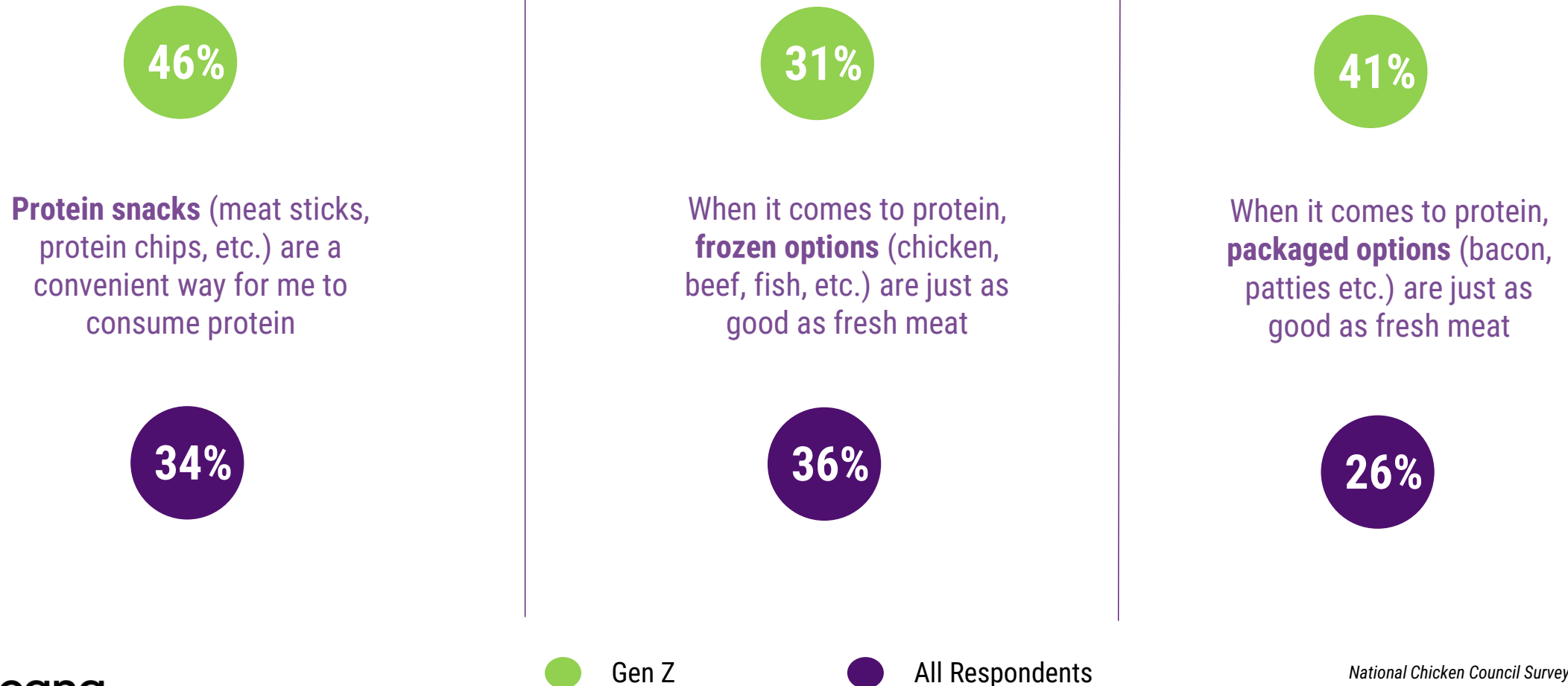


Total Buyers N=535



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

Protein sources Gen Z likes more than the general population

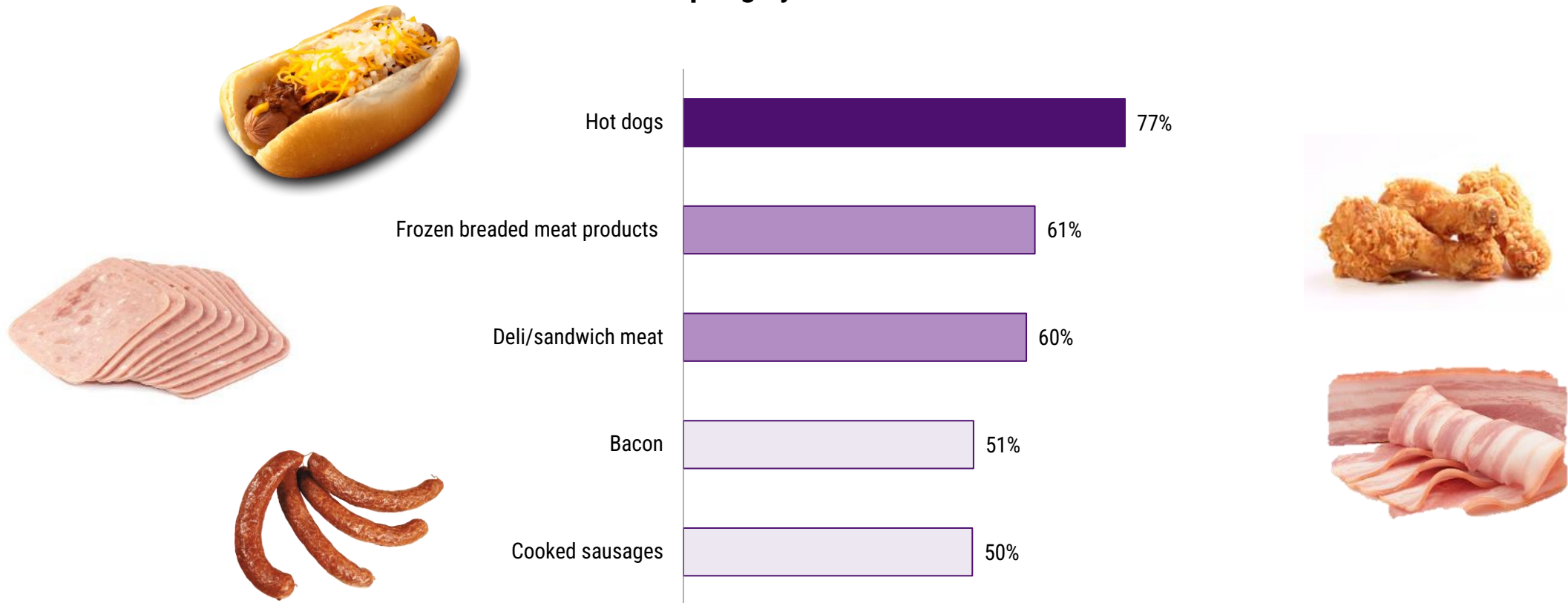


The background features a complex, abstract pattern of wavy, horizontal lines in shades of purple and magenta, with some orange highlights. These lines are set against a dark, almost black, background. Scattered throughout the scene are numerous small, glowing particles or dots, some of which appear to be moving or pulsing, creating a sense of dynamic energy and depth.

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



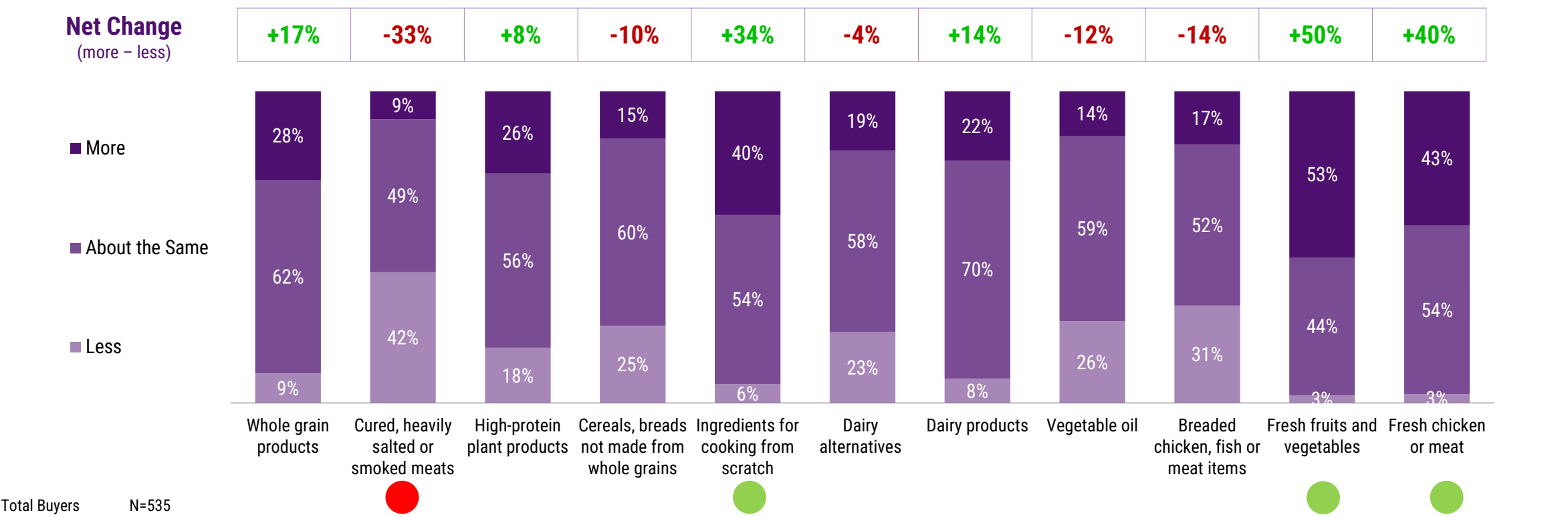
Total Buyers N=535



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?

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

Change In Habits



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?

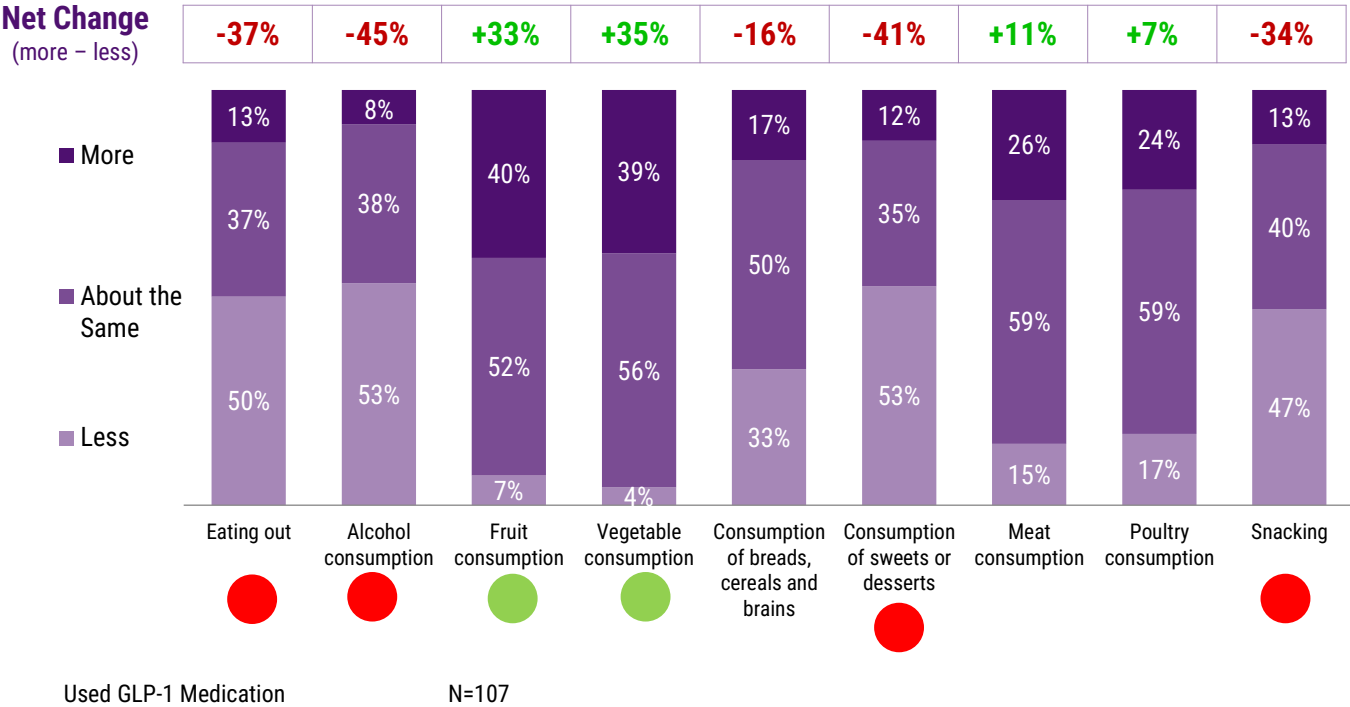
GLP-1 use more than doubled (was 12%) in 2 years. Those who use prefer healthy options for food; the impact is staggering.

GLP-1 Usage And Change In Habits



Total Buyers N=535

27%
Of respondents or members of their HH have used a GLP-1 medication

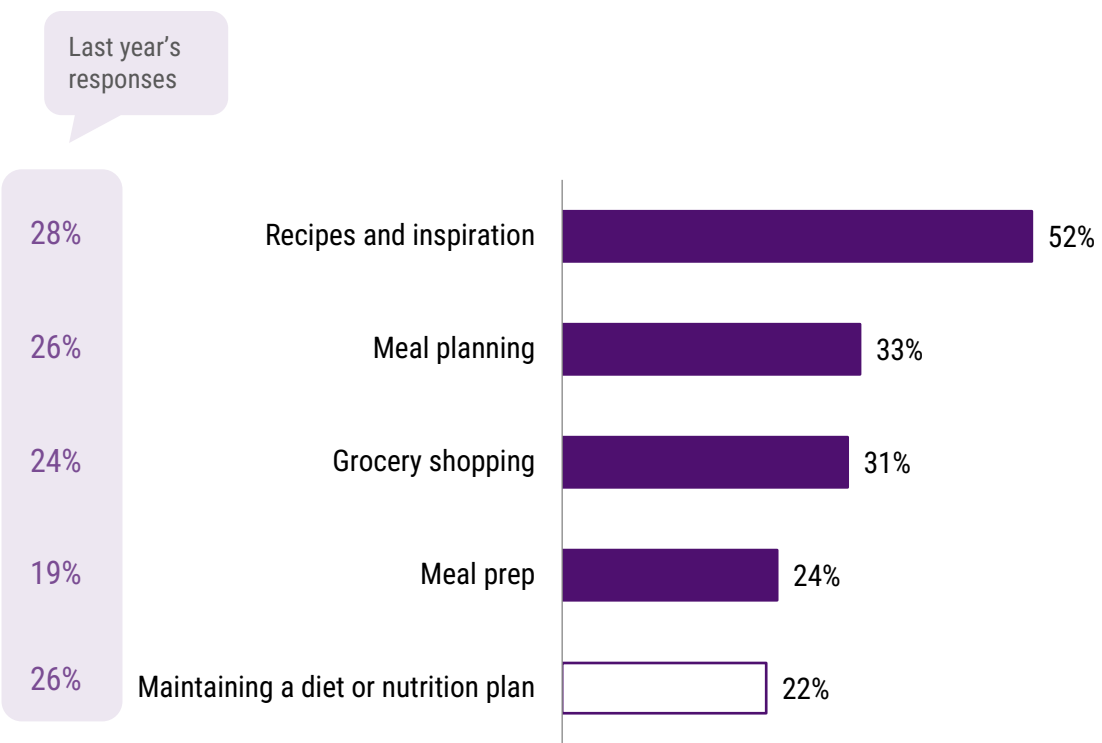


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AI: Difference One Year Makes

Over half use AI for recipes and inspiration, led by younger consumers.

AI's penetration into our lives is evident in significantly higher YoY numbers



Total Buyers N=535

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%	Higher within Cohort
	41%	40%	44%	32%	13%	
	31%	35%	41%	29%	19%	
	34%	38%	34%	16%	8%	
	29%	33%	25%	21%	11%	Lower within Cohort



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

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

Appendix

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%

AI Usage

35%

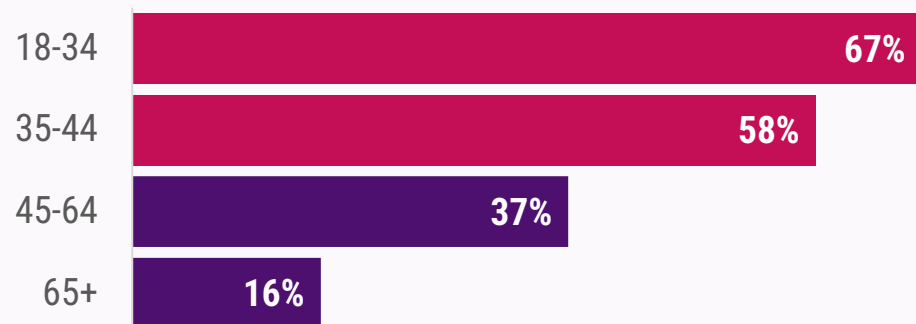
of fresh chicken
buyers use AI for
food shopping,
prep or planning

	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%

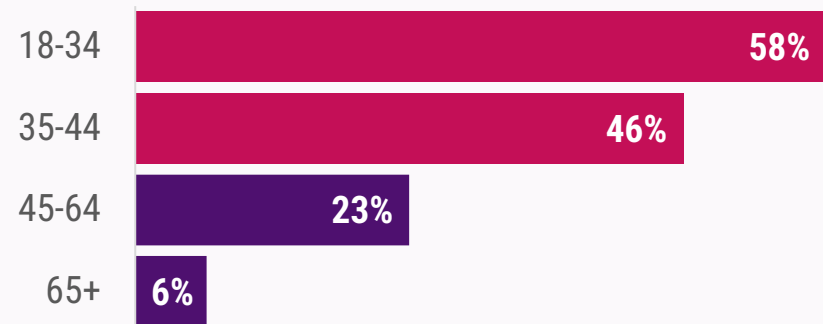


(From 2025 presentation) Companies that can **reduce stress** for younger consumers will be on the winning side of the business

Stress makes it hard for them to focus



Most days their stress is overwhelming



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

Stress in America – American Psychology Association, 2023