



Monthly Updates

Trends to Know

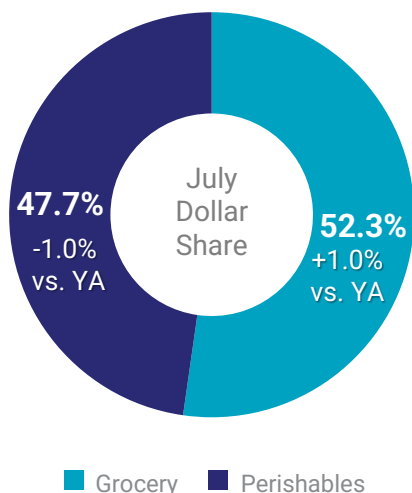
July 2026



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Trends in Two Minutes



In July, grocery maintained the larger share of total store dollars, accounting for just over half of sales. Grocery also posted stronger dollar growth than perishables, while perishables experienced a smaller decline in units.

According to the Circana Shopper Survey, Fourth of July celebrations remained centered on intimate, at-home gatherings, with 37% planning to get together with close friends or extended family and 28% planning to barbecue or grill, signaling that connection and food continue to be the primary drivers of the holiday experience.

86%

of shoppers believe grocery prices are higher than a year ago, including 51% who say prices are "much higher"

53%

of households are looking for sales/deals more often

44%

of shoppers say they are cutting back on non-essentials

Perishables Performance

July sales, which included for Fourth of July celebrations, delivered mixed results across perishables departments. Meat continued to lead perishables in dollar sales, growing 1.2% despite a 0.9% decline in units, benefiting from seasonal grilling demand. Produce remained challenged, with dollars down 3.0% and units declining 4.7%. Dairy improved from recent trends with unit growth of 1.2%, although dollars remained down 2.3% as pricing pressures persisted. Deli posted modest dollar growth of 0.7% while units were essentially flat. Bakery sales declined 0.9% and units fell 2.7%, and seafood generated slight dollar growth but continued to see unit declines.

Perimeter Overview

July 2026

Departments	\$ Sales	\$ Sales vs. YA	Unit Sales vs. YA
Meat Department	\$8.9B	1.2%	-0.9%
Produce Department	\$7.9B	-3.0%	-4.7%
Dairy Aisle	\$6.6B	-2.3%	1.2%
Deli Department	\$4.4B	0.7%	-0.2%
Bakery Department	\$3.8B	-0.9%	-2.7%
Seafood Department	\$698.4M	0.6%	-2.1%



DAIRY, DELI, BAKERY SNAPSHOT

Dairy continued to outperform total food and beverage in unit sales growth during July 2026, while deli remained relatively stable and bakery trailed the broader market despite the benefit of Fourth of July holiday demand. July performance reflected ongoing differences across departments. Dairy unit sales increased 1.2% despite a 2.3% decline in dollars as prices remained below year-ago levels. Deli generated modest dollar growth of 0.7%, supported by holiday entertaining occasions, while units were nearly flat at -0.2%. Bakery experienced declines in both dollars (-0.9%) and units (-2.7%). Looking at the latest 52 weeks, dairy and deli unit trends remained stronger than their latest 4-week performance, while bakery showed continued pressure in units despite positive annual dollar growth.

July 2026

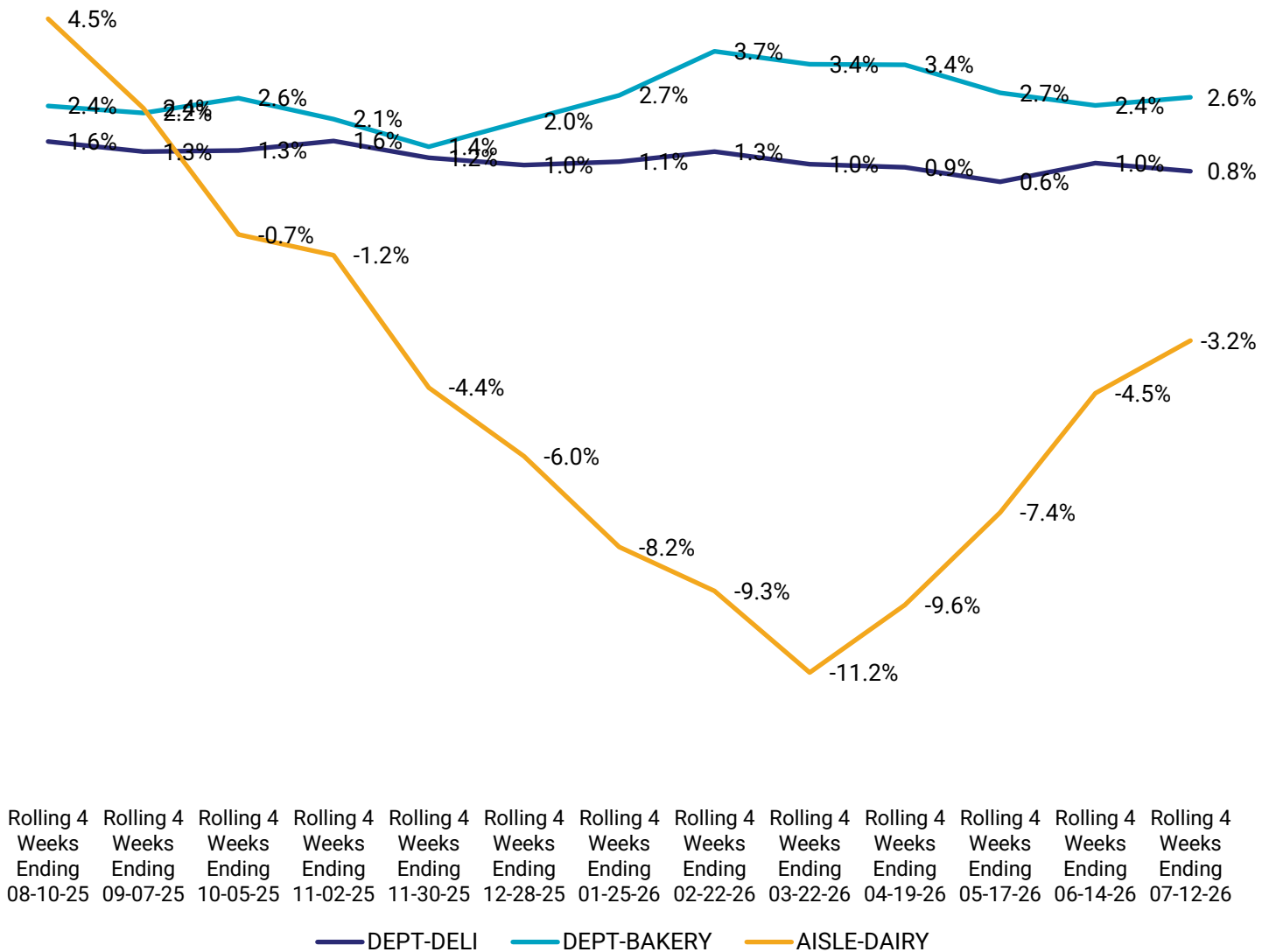
Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
Total Food & Beverage	\$74.9B	1.2%	17.1B	-0.9%
Dairy	\$6.6B	-2.3%	1.8B	1.2%
Deli	\$4.4B	0.7%	708.8M	-0.2%
Bakery	\$3.8B	-0.9%	979.3M	-2.7%

Latest 52WE 7/26/26

Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
Total Food & Beverage	\$971.2B	2.3%	223.5B	0.1%
Dairy	\$88.6B	-3.8%	23.6B	1.2%
Deli	\$56.5B	3.0%	9.B	1.8%
Bakery	\$49.6B	1.1%	12.6B	-1.5%

Dairy, Deli, and Bakery

Price per unit % change vs. YA



Time Period	Price/unit	Change vs. YA	Change vs. 3YA
Total Dairy July 2026	\$3.72	-3.5%	6.8%
Total Dairy 52WE 7/26/26	\$3.75	-5.0%	1.5%
Total Deli July 2026	\$6.25	0.9%	1.5%
Total Deli 52WE 7/26/26	\$6.28	1.1%	2.0%
Total Bakery July 2026	\$3.87	1.9%	4.4%
Total Bakery 52WE 7/26/26	\$3.94	2.6%	6.3%

DAIRY SALES

DAIRY

In July, total dairy sales reached \$6.6 billion, with dollars declining 2.3% vs YA and unit sales increasing 1.2%. Results varied across categories despite increased holiday demand tied to the Fourth of July. Yogurt and cottage cheese remained standout growth drivers, posting strong gains in both dollars and units. Cottage cheese led the department with 20.0% dollar growth and 10.9% unit growth, while yogurt grew 9.8% in dollars and 3.1% in units. Milk also benefited from seasonal demand, posting solid dollar gains. Refrigerated whipped toppings, refrigerated desserts, cream cheese, and sour cream generated unit growth. Eggs, processed cheese, and butter/spreads remained challenged.



July 2026

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Dairy	\$6.6B	-2.3%	1.2%
Milk	\$1.5B	6.8%	0.4%
Dairy Natural Cheese	\$1.1B	-3.0%	0.7%
Yogurt	\$1.1B	9.8%	3.1%
Rfg Eggs	\$790.5M	-27.9%	-0.6%
Rfg Creams/Creamers	\$501.1M	0.8%	0.1%
Butter/Margarine/Spreads	\$479.5M	-7.0%	-0.8%
Cream Cheese	\$203.3M	-3.4%	3.0%
Cottage Cheese	\$190.8M	20.0%	10.9%
Dairy Processed Cheese	\$178.9M	-4.3%	-3.5%
Rfg Whipped Toppings	\$178.6M	-0.4%	6.4%
Sour Cream	\$144.1M	1.3%	0.2%
Rfg Desserts	\$95.1M	3.9%	4.1%
Rfg Cheese Snack Kits	\$22.6M	4.9%	7.8%
Dairy Alternative Cheese	\$8.5M	-9.7%	-11.3%

52WE 7/26/26

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Dairy	\$88.6B	-3.8%	1.2%
Milk	\$19.7B	2.4%	0.2%
Dairy Natural Cheese	\$15.4B	-2.7%	0.9%
Yogurt	\$13.6B	11.3%	3.4%
Rfg Eggs	\$12.1B	-27.8%	1.8%
Butter/Margarine/Spreads	\$7.2B	-5.3%	-1.2%
Rfg Creams/Creamers	\$7.B	1.3%	1.2%
Cream Cheese	\$2.9B	-3.9%	0.2%
Rfg Whipped Toppings	\$2.6B	0.3%	5.1%
Dairy Processed Cheese	\$2.3B	-6.1%	-4.9%
Cottage Cheese	\$2.2B	16.8%	10.5%
Sour Cream	\$1.9B	0.4%	-0.6%
Rfg Desserts	\$1.2B	1.2%	-3.1%
Rfg Cheese Snack Kits	\$291.1M	-6.8%	-5.5%
Dairy Alternative Cheese	\$120.5M	-6.3%	-6.3%

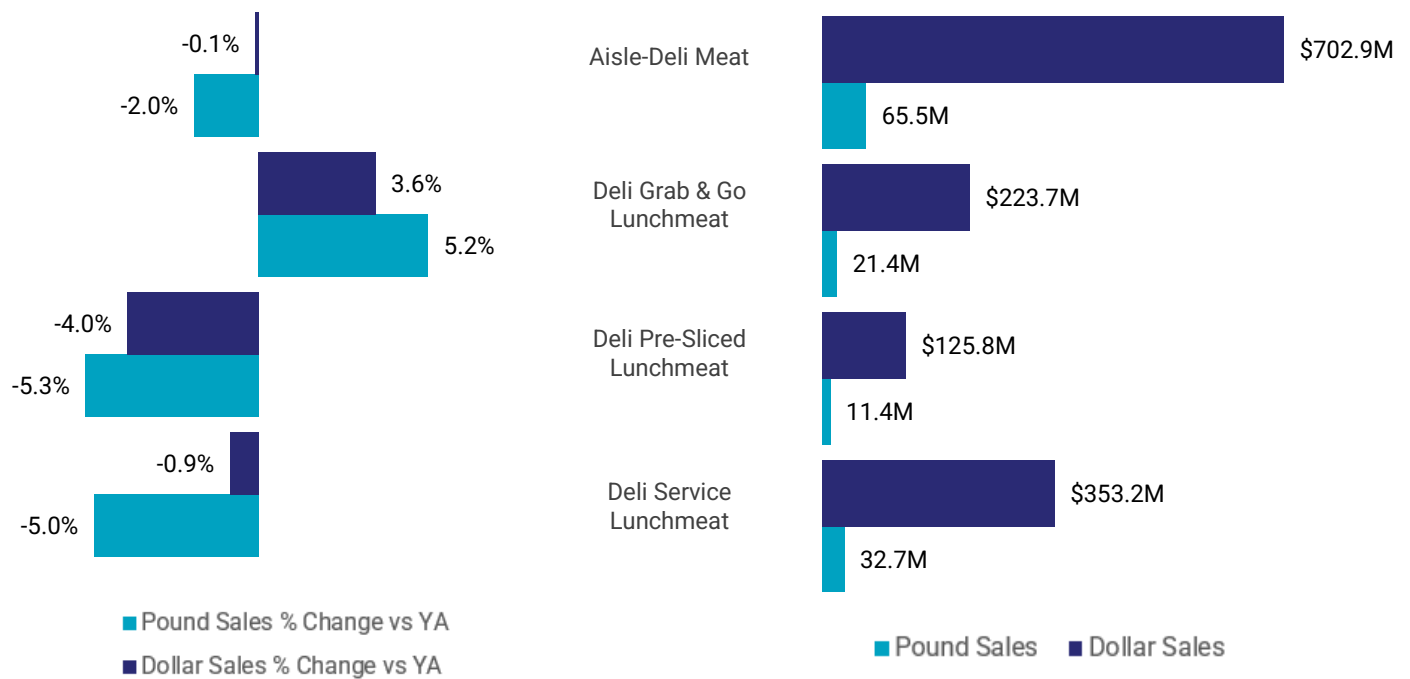
DELI SALES

DELI MEAT

Deli meat sales totaled \$702.9 million in July, with dollar sales declining just 0.1% and pounds decreasing 2.0% versus year ago during a month that included Fourth of July entertaining occasions. Performance remained highly segmented across formats. Grab & Go lunchmeat continued to lead the category, growing 3.6% in dollars and 5.2% in pounds, reflecting consumers' preference for convenience and ready-to-eat options for gatherings and quick meals. In contrast, both pre-sliced lunchmeat and service lunchmeat experienced declines in dollars and pounds, with pre-sliced facing the steepest pressure.

Deli Meat Overview

Dollars and Pounds, 4WE 7/26/26



July 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pound Sales	Pound Sales % Change vs. YA
Aisle Deli Meat	\$702.9M	-0.1%	65.5M	-2.0%
Deli Grab & Go Lunchmeat	\$223.7M	3.6%	21.4M	5.2%
Deli Pre-sliced Lunchmeat	\$125.8M	-4.0%	11.4M	-5.3%
Deli Service Lunchmeat	\$353.2M	-0.9%	32.7M	-5.0%

DELI SALES

PACKAGED LUNCHEAT – MEAT DEPARTMENT

Packaged lunchmeat sold within the meat department generated \$558.9 million in July sales, declining 2.8% in dollars and 6.4% in pounds versus year ago despite the benefit of Fourth of July consumption occasions. Declines remained considerably steeper than those seen in aisle deli meat, which posted only a 0.1% dollar decline and a 2.0% reduction in pounds. The performance gap suggests consumers continue to favor fresh and prepared deli offerings over packaged alternatives.

July 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$558.9M	-2.8%	-6.4%

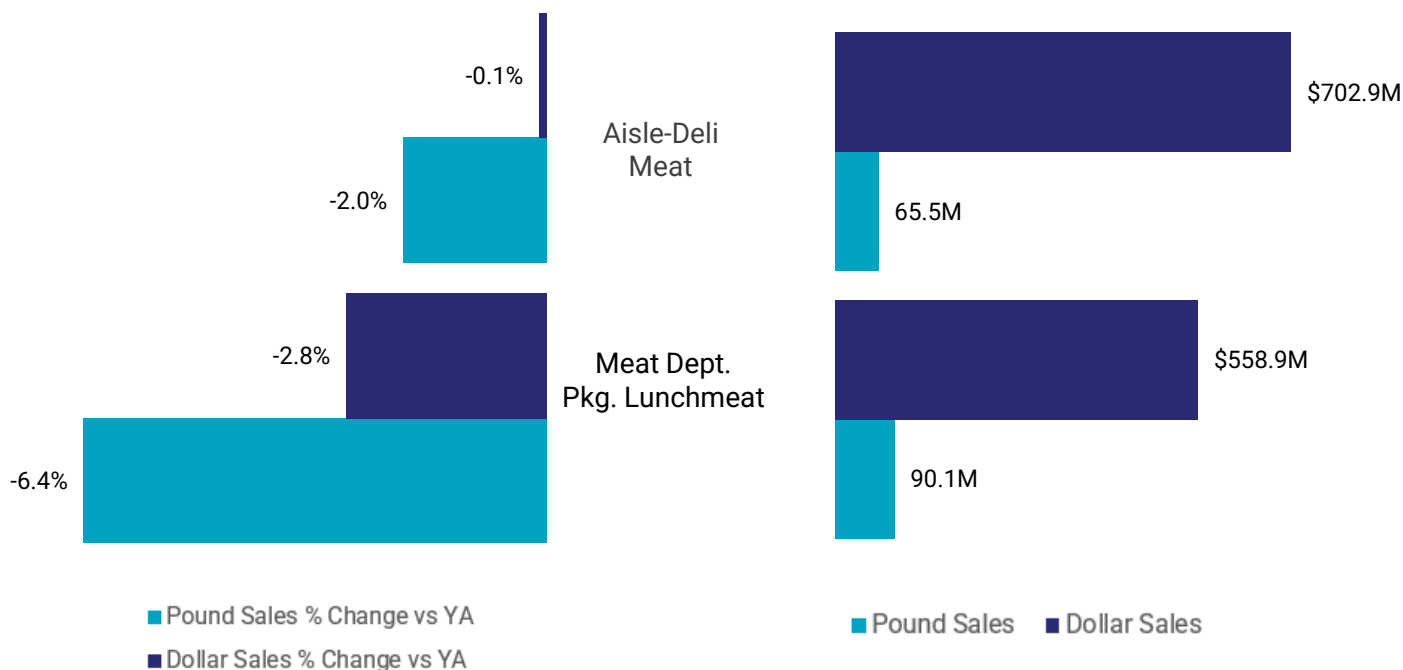
52WE 7/26/26

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$6.9B	-1.9%	-5.2%



Deli vs. Packaged Lunchmeat Overview

Dollars and Pounds, 4WE 7/26/26



DELI SALES

DELI ENTERTAINING/DELI PREPARED

Deli Entertaining

Deli entertaining sales totaled \$529 million in July, with dollars increasing 0.5% and units rising 1.5% versus a year ago, benefiting from Fourth of July celebrations and summer entertaining occasions. Performance was mixed across subcategories, with pickles and relish continuing to stand out through double-digit growth in both dollars (14.4%) and units (13.8%), likely supported by grilling and cookout occasions.

July 2026

52WE 7/26/26

Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Deli Entertaining	\$529.1M	0.5%	1.5%	Deli Entertaining	\$6.5B	0.6%	0.4%
Dips and Sauces	\$276.M	-1.7%	-1.2%	Dips and Sauces	\$3.4B	0.0%	-0.4%
Trays	\$91.2M	-0.8%	-2.6%	Trays	\$1.2B	0.0%	1.8%
Spreads	\$82.9M	-2.5%	2.5%	Spreads	\$1.1B	-1.0%	-1.0%
Pickles/Relish	\$78.9M	14.4%	13.8%	Pickles/Relish	\$874.9M	5.8%	4.4%
Holiday Meals	\$183,280	10.6%	-3.2%	Holiday Meals	\$31.2M	10.8%	1.5%

Deli Prepared

Deli prepared continued to outperform the broader deli department, generating 1.1% dollar growth in July. Growth was led by convenience-driven categories including entrees, appetizers, soups and chili, prepared meats, and combo meals, all of which posted gains in both dollars and units. The results highlight continued consumer demand for convenient meal solutions and ready-to-eat options during summer gatherings and holiday celebrations.

July 2026

52WE 7/26/26

Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Deli Prepared	\$2.5B	1.1%	-0.3%	Deli Prepared	\$32.2B	3.6%	2.9%
Entrees	\$720.M	5.2%	2.8%	Entrees	\$9.5B	7.8%	5.1%
Prepared Meats	\$499.6M	0.4%	0.1%	Prepared Meats	\$6.5B	0.7%	1.4%
Salads	\$347.M	-3.9%	-4.8%	Sandwiches	\$3.9B	2.0%	4.2%
Sandwiches	\$315.8M	-2.1%	-3.4%	Salads	\$3.7B	1.3%	0.3%
Appetizers	\$203.7M	4.4%	3.1%	Appetizers	\$2.6B	6.8%	6.2%
Side Dishes	\$166.8M	-0.7%	-2.1%	Side Dishes	\$2.3B	1.0%	0.4%
Pizza	\$92.8M	-2.2%	-0.2%	Soups & Chili	\$1.5B	5.8%	3.1%
Soups & Chili	\$66.M	10.4%	6.8%	Pizza	\$1.2B	-0.3%	0.5%
Breakfast	\$40.9M	-5.4%	2.1%	Breakfast	\$574.4M	-0.2%	0.8%
Combo Meals	\$14.9M	7.7%	7.3%	Combo Meals	\$194.8M	4.7%	5.3%
Desserts	\$5.5M	-5.9%	-10.1%	Desserts	\$80.2M	-1.8%	-0.5%

DELI SALES

DELI CHEESE

Deli cheese sales reached \$720.8 million in the month that included the Fourth of July holiday, with dollars increasing 0.2% and pounds growing 0.3% versus a year ago. Specialty cheese remained the primary growth driver, delivering gains of 2.6% in dollars and 3.0% in pounds. Grab & Go cheese also generated positive growth in both measures, supported by continued consumer demand for convenient and snackable formats. Meanwhile, service cheese and pre-sliced cheese remained challenged, with both segments posting declines in dollars and pounds.



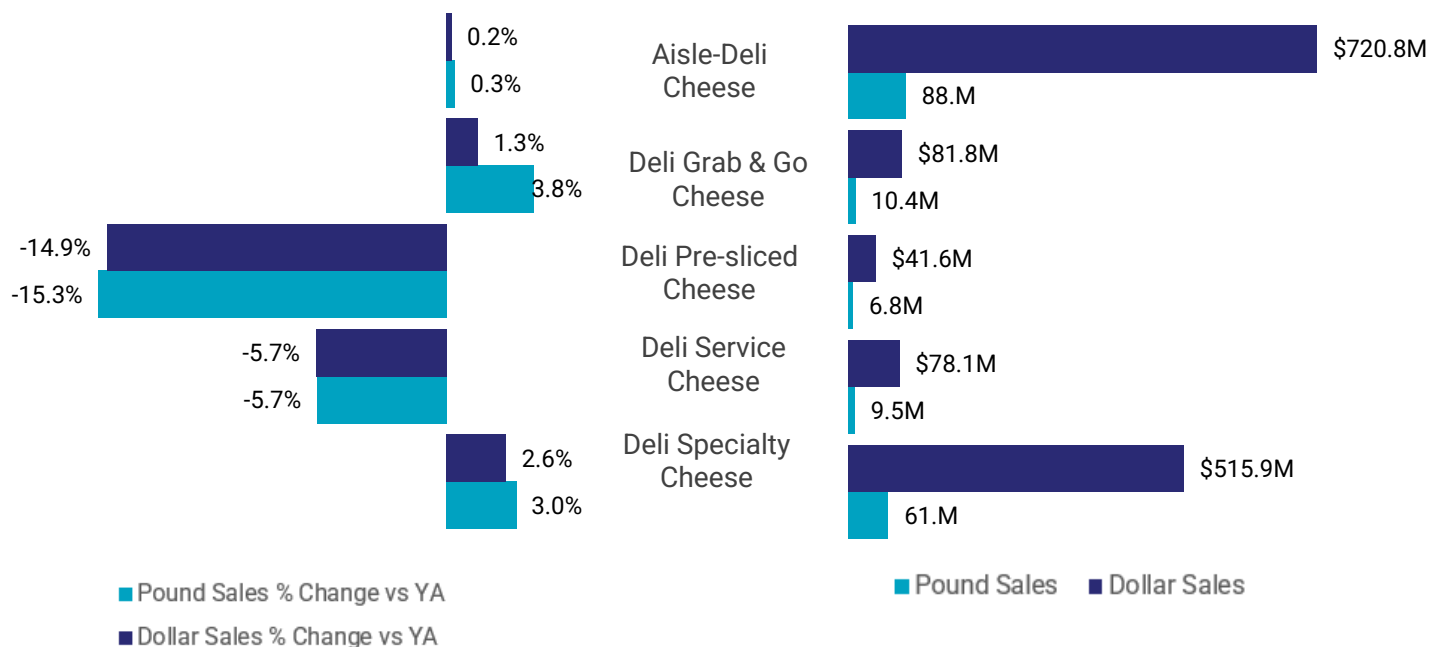
July 2026

52WE 7/26/26

Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA	Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Total Deli Cheese	\$720.8M	0.2%	0.3%	Total Deli Cheese	\$9.1B	2.6%	2.0%
Specialty	\$515.9M	2.6%	3.0%	Specialty	\$6.6B	4.3%	4.0%
Grab & Go	\$81.8M	1.3%	3.8%	Service	\$979.M	2.9%	4.0%
Service	\$78.1M	-5.7%	-5.7%	Grab & Go	\$984.5M	-2.8%	-5.4%
Pre-sliced	\$41.6M	-14.9%	-15.3%	Pre-sliced	\$559.4M	-5.5%	-4.8%

Deli Cheese Overview

Dollars and Volume, 4WE 7/26/26



BAKERY SALES

BAKERY

Dollar sales were

\$3.8B

in July 2026



Bakery department sales, including both center-store and perimeter bakery, reached \$3.8 billion in July, declining 0.9% in dollars and 2.7% in units versus a year ago. While the July period included Fourth of July celebrations, holiday demand was not enough to offset broader category challenges. Center-store bakery sales declined 0.5% in dollars and 3.3% in units, while perimeter bakery sales decreased 1.1% in dollars and 1.4% in units. The continued unit performance advantage for perimeter bakery suggests consumers remain more engaged with fresh bakery offerings than packaged alternatives.

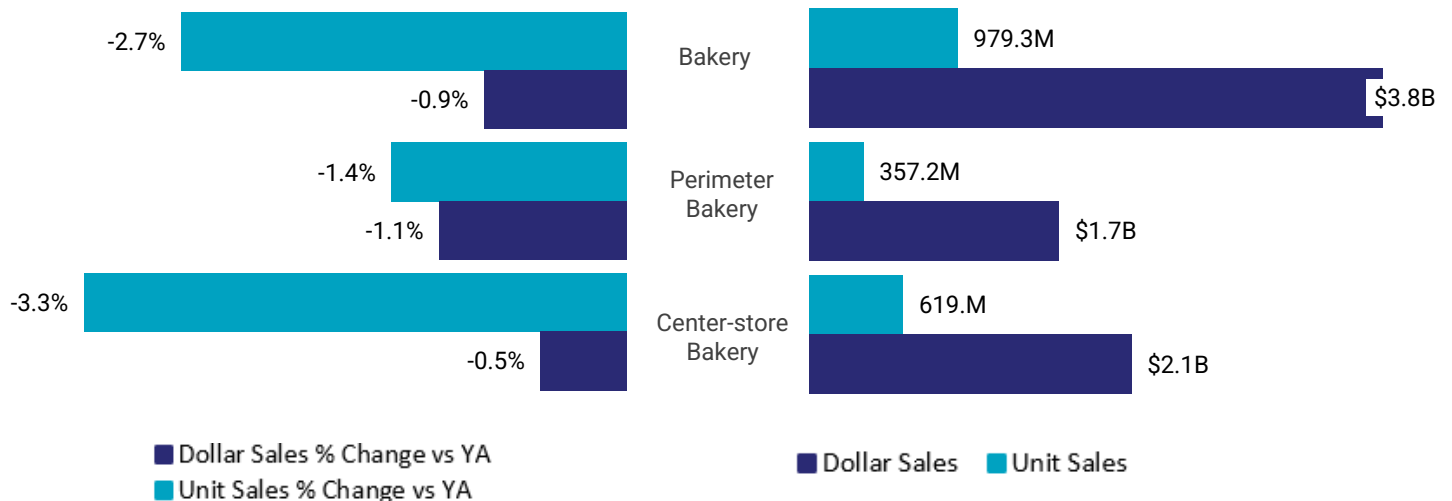
July 2026

52WE 7/26/26

Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Total Bakery	\$3.8B	-0.9%	-2.7%	Total Bakery	\$49.6B	1.1%	-1.5%
Center-store Bakery	\$2.1B	-0.5%	-3.3%	Center-store Bakery	\$26.8B	-0.2%	-2.7%
Perimeter Bakery	\$1.7B	-1.1%	-1.4%	Perimeter Bakery	\$22.7B	2.8%	0.7%

Bakery Overview

Dollars and Volume, 4WE 7/26/26



BAKERY SALES

CENTER AISLE BAKERY

Center Aisle Bakery

For baked goods sold in the center-store bakery aisle, dollar sales declined 0.5% and units fell 3.3% versus a year ago despite increased seasonal traffic around the Fourth of July holiday. While most major categories remained challenged, bagels/bialys and croissants delivered the strongest gains, posting increases in both dollars and units, while buns & rolls also generated modest dollar growth. In contrast, muffins, wraps/flatbreads, brownies/squares/bars, pies, and morning bakery categories experienced some of the steepest declines.

July 2026

52WE 7/26/26

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Center Store Bakery	\$2.1B	-0.5%	-3.3%
Breads & Rolls	\$1.7B	0.4%	-2.6%
Desserts/Sweet Snacks	\$249.9M	-4.3%	-5.7%
Morning Bakery	\$202.8M	-3.2%	-6.4%
Breads	\$873.9M	-0.3%	-3.1%
Buns & Rolls	\$577.M	0.6%	-2.0%
Bagels/Bialys	\$127.5M	7.4%	4.3%
Snack Cakes	\$92.8M	-3.5%	-4.4%
Donuts	\$80.M	-0.3%	-4.8%
Cookies	\$75.1M	-2.5%	-5.0%
Muffins	\$70.1M	-5.0%	-11.7%
English Muffins	\$64.M	-1.8%	-9.6%
Pastry/Danish/Coffee Cakes	\$52.7M	-5.0%	-3.4%
Brownies/Squares/Bars	\$32.M	-12.3%	-10.4%
Cakes	\$30.5M	0.9%	-6.2%
Wraps/Flatbreads	\$21.6M	-9.5%	-11.3%
Pies	\$19.4M	-8.7%	-6.2%
Croissants	\$12.6M	7.1%	3.6%

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Center Store Bakery	\$26.8B	-0.2%	-2.7%
Breads & Rolls	\$20.3B	-0.3%	-2.1%
Desserts/Sweet Snacks	\$3.7B	0.1%	-4.9%
Morning Bakery	\$2.8B	-0.5%	-3.8%
Breads	\$11.4B	-1.1%	-2.9%
Buns & Rolls	\$5.9B	0.0%	-1.4%
Bagels/Bialys	\$1.6B	2.7%	0.6%
Snack Cakes	\$1.5B	1.9%	-2.7%
Donuts	\$1.1B	2.5%	-1.8%
Cookies	\$1.B	3.5%	-4.1%
Muffins	\$1.B	-3.3%	-7.8%
English Muffins	\$881.6M	-0.4%	-4.3%
Pastry/Danish/Coffee Cakes	\$713.9M	-0.7%	-2.7%
Brownies/Squares/Bars	\$500.4M	-2.2%	-5.7%
Cakes	\$389.9M	-7.4%	-11.6%
Wraps/Flatbreads	\$320.6M	10.3%	5.8%
Pies	\$270.7M	-6.6%	-6.7%
Croissants	\$159.7M	6.8%	1.8%

BAKERY SALES

PERIMETER BAKERY

Perimeter Bakery (including both fixed and random weight)

Perimeter bakery generated \$1.7 billion in July sales, with dollars declining 1.1% and units decreasing 1.4% versus a year ago. Although the period included Fourth of July celebrations, performance varied considerably across segments. Brownies/squares/bars posted the strongest growth, with dollars up 13.4% and units increasing 16.6%. Cookies, breads, croissants, tortillas/wraps/flatbreads, and donuts also recorded positive dollar trends, reflecting demand for gathering and entertaining occasions. However, muffins, bagels/bialys, pies, buns & rolls, specialty desserts, and cakes remained challenged, contributing to the department's overall decline.

July 2026

52WE 7/26/26

Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Perimeter Bakery	\$1.7B	-1.1%	-1.4%	Perimeter Bakery	\$22.7B	2.8%	0.7%
Desserts/Sweet Snacks	\$870.5M	-0.8%	0.9%	Desserts/Sweet Snacks	\$11.9B	2.2%	1.6%
Morning Bakery	\$400.3M	-3.4%	-3.4%	Morning Bakery	\$5.7B	4.0%	2.7%
Breads & Rolls	\$380.6M	0.7%	-2.2%	Breads & Rolls	\$5.1B	3.0%	-2.0%
Cakes	\$488.3M	-2.0%	-1.1%	Cakes	\$6.6B	2.8%	2.5%
Cookies	\$257.5M	1.1%	1.7%	Cookies	\$3.4B	1.9%	-0.4%
Pastry/Danish/Coffee Cakes	\$144.3M	-3.9%	-3.2%	Pastry/Danish/Coffee Cakes	\$2.1B	3.5%	2.4%
Donuts	\$139.5M	1.8%	-2.8%	Donuts	\$1.9B	3.1%	1.1%
Breads	\$137.1M	10.3%	-2.0%	Breads	\$1.9B	8.3%	-2.7%
Muffins	\$116.5M	-8.5%	-4.9%	Muffins	\$1.7B	5.5%	5.8%
Buns & Rolls	\$97.5M	-6.1%	-4.6%	Pies	\$1.3B	-3.2%	-0.1%
Croissants	\$82.2M	0.4%	0.8%	Buns & Rolls	\$1.2B	-4.7%	-3.9%
Pies	\$70.8M	-7.0%	0.6%	Croissants	\$1.1B	5.6%	1.2%
Brownies/Squares/Bars	\$47.5M	13.4%	16.6%	Brownies/Squares/Bars	\$538.3M	18.7%	15.4%
Tortillas/Wraps/Flatbreads	\$34.4M	4.6%	5.6%	Bagels/Bialys	\$448.4M	-3.7%	-2.1%
Bagels/Bialys	\$29.1M	-16.5%	-4.0%	Tortillas/Wraps/Flatbreads	\$439.3M	5.2%	4.1%
Specialty Desserts	\$6.3M	-10.2%	-7.8%	Specialty Desserts	\$99.7M	-23.5%	-3.7%



Want to know more? Circana can go beyond this monthly report. Scan the QR code.



IDDBA members who are new clients to Circana will receive a discount of 10% for their first purchase.*

Date ranges:

2021: 52 weeks ending 1/2/2022
2022: 52 weeks ending 1/1/2023
2023: 52 weeks ending 12/31/2023
2024: 52 weeks ending 12/29/2024
2025: 52 weeks ending 12/28/2025

Q1 2026: 13 weeks ending 3/29/2026
Q2 2026: 13 weeks ending 6/28/2026
July 2026: 4 weeks ending 7/26/2026



*10% discount up to \$3,000 for first syndicated purchase for verified IDDBA members

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