



Monthly Updates

Trends to Know

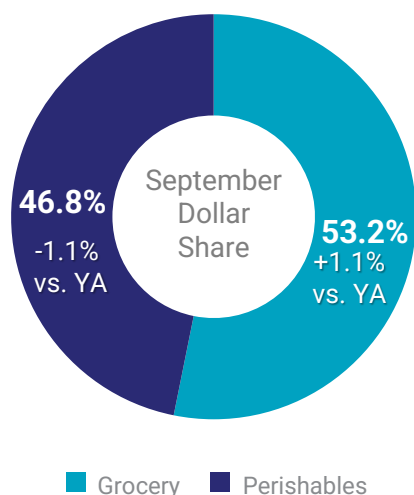
September 2026



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Trends in Two Minutes



In September, grocery represented 53.2% of total store dollar sales compared to 46.8% for perishables. Grocery dollar sales increased 4.2%, supported by both unit growth and higher prices, while perishables sales were essentially flat, declining just 0.2%, as shoppers remained selective across fresh categories.

Circana's Shopper Survey shows consumers continue to feel pressure from food inflation, but shoppers are adapting rather than retreating.

53%

of shoppers are looking for **sales or deals more often**

86%

of shoppers say grocery prices are **higher than last year**

54%

of shoppers are **extremely concerned** about **food cost inflation**

Perishables Performance

September perishables performance remained mixed, with seafood, meat, and deli generating dollar growth while produce, dairy, and bakery declined. Meat remained the largest perishables department at \$8.7 billion, with dollar sales increasing 1.5% and unit sales up 0.7%. Produce sales declined 1.8% and units fell 3.2%. Dairy generated \$6.7 billion, with units increasing 1.0% despite dollar sales declining 1.3% due to continued price deflation. Deli remained resilient, growing 0.5% in dollars while units were nearly flat at -0.2%. Bakery sales declined 0.9% with units down 2.4%. Seafood led all perimeter departments, growing 5.8% in dollars and 2.4% in units.

Perimeter Overview

September 2026

Departments	\$ Sales	\$ Sales vs. YA	Unit Sales vs. YA
Meat Department	\$8.7B	1.5%	0.7%
Produce Department	\$7.2B	-1.8%	-3.2%
Dairy Aisle	\$6.7B	-1.3%	1.0%
Deli Department	\$4.3B	0.5%	-0.2%
Bakery Department	\$3.7B	-0.9%	-2.4%
Seafood Department	\$666.3M	5.8%	2.4%



DAIRY, DELI, BAKERY SNAPSHOT

Dairy, deli, and bakery continued to reflect distinct consumer purchasing dynamics. In September 2026, dairy generated \$6.7 billion in sales, with dollar sales declining 1.3% while unit sales increased 1.0%, driven by continued price deflation. Deli sales reached \$4.3 billion and remained one of the strongest-performing fresh departments, with dollar sales up 0.5% and units nearly flat at -0.2%. Bakery generated \$3.7 billion, with dollar sales declining 0.9% and units down 2.4%, suggesting consumers remained selective within discretionary bakery purchases. Looking across the latest 52 weeks, deli remained the strongest growth engine among the three departments, with dollar sales increasing 2.5% and unit sales rising 1.5%, while dairy continued to face pricing-related dollar pressure despite positive volume growth.

September 2026

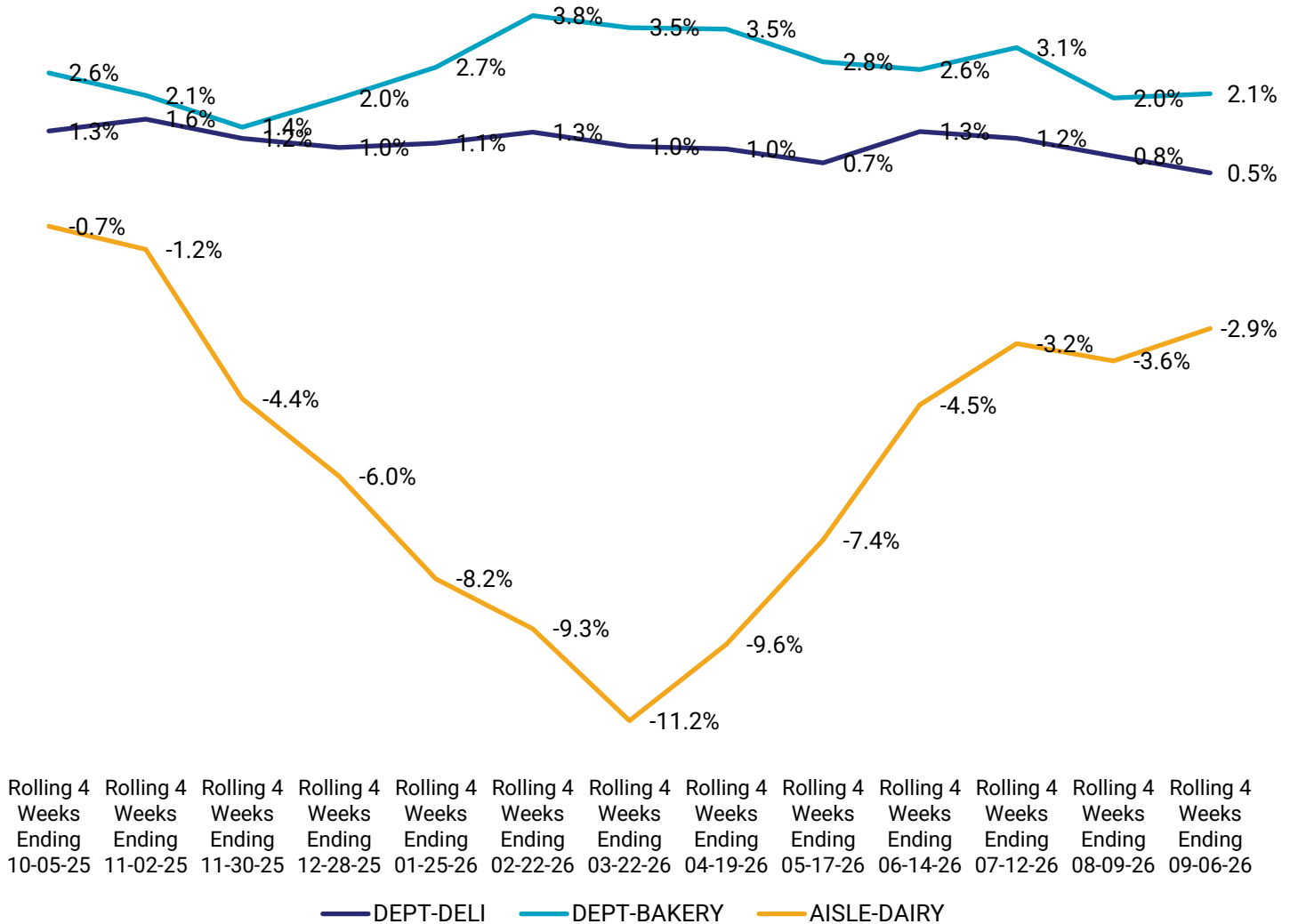
Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
Total Food & Beverage	\$73.7B	2.1%	16.7B	-0.1%
Dairy	\$6.7B	-1.3%	1.8B	1.0%
Deli	\$4.3B	0.5%	686.4M	-0.2%
Bakery	\$3.7B	-0.9%	937.5M	-2.4%

Latest 52WE 9/27/26

Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
Total Food & Beverage	\$974.1B	2.1%	223.3B	0.0%
Dairy	\$88.3B	-4.6%	23.7B	1.2%
Deli	\$56.6B	2.5%	9.B	1.5%
Bakery	\$49.7B	0.9%	12.5B	-1.6%

Dairy, Deli, and Bakery

Price per unit % change vs. YA



Time Period	Price/unit	Change vs. YA	Change vs. 3YA
Total Dairy September 2026	\$3.75	-2.2%	7.2%
Total Dairy 52WE 9/27/26	\$3.73	-5.7%	1.5%
Total Deli September 2026	\$6.28	0.7%	1.7%
Total Deli 52WE 9/27/26	\$6.29	1.0%	1.9%
Total Bakery September 2026	\$3.92	1.5%	4.5%
Total Bakery 52WE 9/27/26	\$3.96	2.6%	5.7%

DAIRY SALES

DAIRY

In September, dairy sales totaled \$6.7 billion, with dollar sales declining 1.3% versus last year while unit sales increased 1.0%. Growth continued to be concentrated in a handful of categories. Yogurt grew 11.0% in dollars, while cottage cheese remained one of the fastest-growing segments in dairy, with dollar sales increasing 20.6% and unit sales up 8.3%. Milk also posted solid gains, with dollars increasing 3.5%. However, several large categories remained pressured in dollars, including refrigerated eggs (-22.2%), butter/spreads (-4.9%), cream cheese (-5.6%), processed cheese (-3.6%), and natural cheese (-2.4%), reflecting the ongoing impact of lower pricing and softer demand across portions of the dairy aisle.



September 2026

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Dairy	\$6.7B	-1.3%	1.0%
Milk	\$1.5B	3.5%	0.1%
Dairy Natural Cheese	\$1.1B	-2.4%	1.2%
Yogurt	\$1.1B	11.0%	-0.5%
Rfg Eggs	\$826.8M	-22.2%	-0.2%
Rfg Creams/Creamers	\$543.8M	2.1%	1.7%
Butter/Margarine/Spreads	\$497.6M	-4.9%	3.5%
Cream Cheese	\$202.7M	-5.6%	1.1%
Cottage Cheese	\$193.6M	20.6%	8.3%
Rfg Whipped Toppings	\$180.1M	1.7%	9.1%
Dairy Processed Cheese	\$169.9M	-3.6%	-3.3%
Sour Cream	\$142.6M	1.5%	1.2%
Rfg Desserts	\$100.8M	5.7%	5.8%
Rfg Cheese Snack Kits	\$27.4M	8.5%	7.3%
Dairy Alternative Cheese	\$8.3M	-9.8%	-10.1%

52WE 9/27/26

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Dairy	\$88.3B	-4.6%	1.2%
Milk	\$19.8B	2.8%	0.3%
Dairy Natural Cheese	\$15.3B	-3.2%	0.9%
Yogurt	\$13.8B	10.9%	2.8%
Rfg Eggs	\$11.6B	-31.6%	1.5%
Butter/Margarine/Spreads	\$7.1B	-5.8%	-0.7%
Rfg Creams/Creamers	\$7.0B	1.3%	1.3%
Cream Cheese	\$2.9B	-4.5%	0.5%
Rfg Whipped Toppings	\$2.6B	-0.4%	5.3%
Cottage Cheese	\$2.3B	17.7%	10.2%
Dairy Processed Cheese	\$2.3B	-5.9%	-4.9%
Sour Cream	\$1.9B	0.3%	-0.4%
Rfg Desserts	\$1.3B	2.8%	-0.6%
Rfg Cheese Snack Kits	\$294.M	-4.8%	-4.3%
Dairy Alternative Cheese	\$118.5M	-6.5%	-6.6%

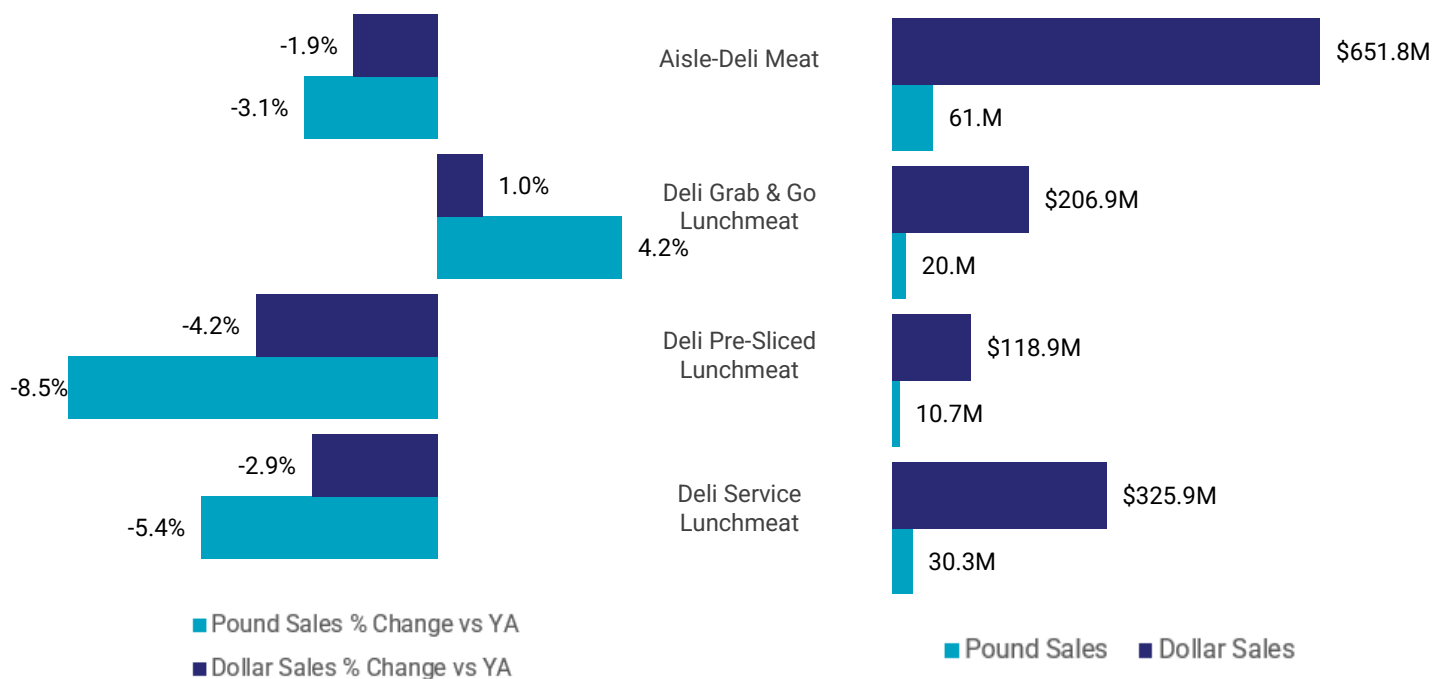
DELI SALES

DELI MEAT

Deli meat sales totaled \$652 million in September, with dollar sales declining 1.9% and volume down 3.1% versus a year ago. Performance varied considerably by format. Grab-and-go lunchmeat remained the strongest-performing segment, growing dollars 1.0% and volume 4.2%, reflecting continued consumer demand for convenience-oriented meal solutions. Service deli lunchmeat declined 2.9% in dollars and 5.4% in volume, while pre-sliced lunchmeat saw the sharpest contraction with dollar sales down 4.2% and volume declining 8.5%. Results continued to indicate stronger shopper interest in portable, ready-to-eat deli offerings compared with more traditional formats.

Deli Meat Overview

Dollars and Pounds, 4WE 9/27/26



September 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pound Sales	Pound Sales % Change vs. YA
Aisle Deli Meat	\$651.8M	-1.9%	61.0M	-3.1%
Deli Grab & Go Lunchmeat	\$206.9M	1.0%	20.0M	4.2%
Deli Pre-sliced Lunchmeat	\$118.9M	-4.2%	10.7M	-8.5%
Deli Service Lunchmeat	\$325.9M	-2.9%	30.3M	-5.4%

DELI SALES

PACKAGED LUNCHEAT — MEAT DEPARTMENT

Packaged lunchmeat generated \$532 million in September sales, with dollar sales declining 2.4% and volume down 3.4% versus a year ago. Performance remained slightly weaker than total deli meat, which declined smaller in both dollars and volume. The continued gap suggests shoppers are increasingly gravitating toward fresh deli alternatives and convenience-focused meal solutions, while packaged lunchmeat continues to face competitive pressure across the protein landscape.

September 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$532.5M	-2.4%	-3.4%

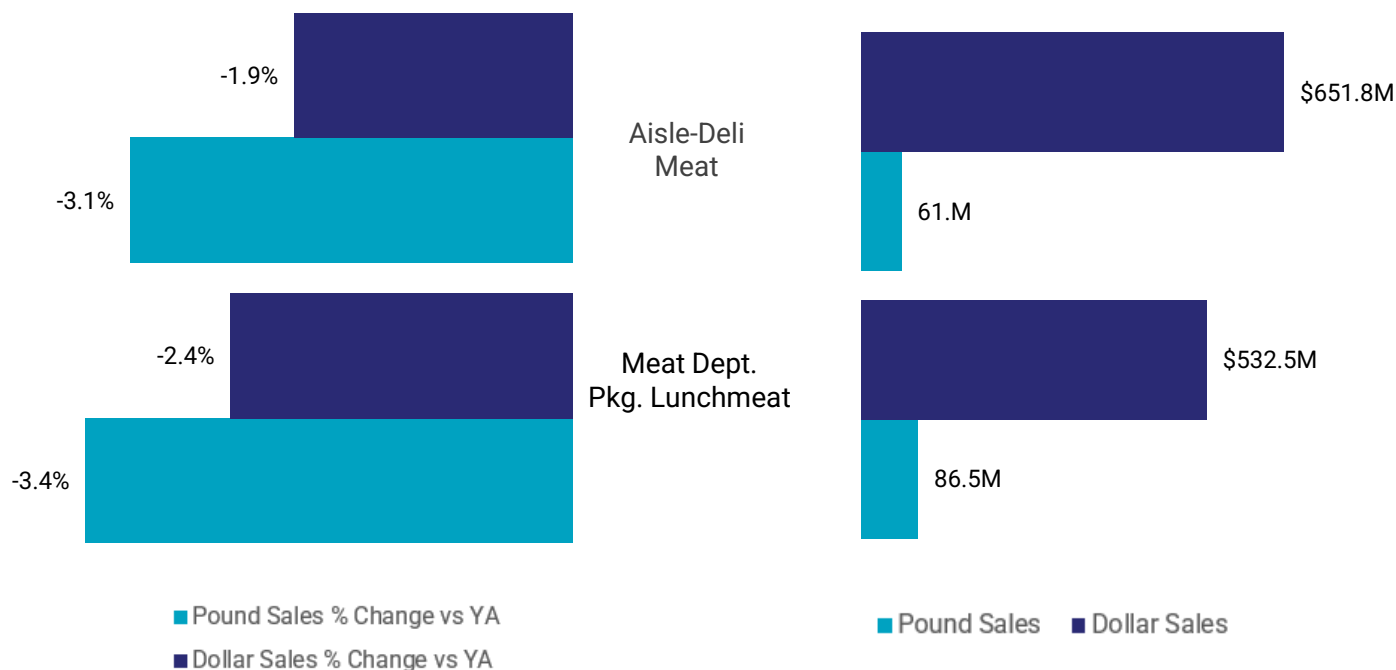
52WE 9/27/26

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$6.8B	-2.1%	-5.4%



Deli vs. Packaged Lunchmeat Overview

Dollars and Pounds, 4WE 9/27/26



DELI SALES

DELI ENTERTAINING/DELI PREPARED

Deli Entertaining

Deli entertaining sales totaled \$486 million in September. Dollar sales increased 0.8% and unit sales rose 0.2%. Performance was driven by exceptional growth in pickles and relish, with dollars up 19.7% and units up 16.5%. Holiday meals also gained, while dips and sauces, trays, and spreads continued to face softer demand.

September 2026

52WE 9/27/26

Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Deli Entertaining	\$486.3M	0.8%	0.2%	Deli Entertaining	\$6.6B	0.3%	0.1%
Dips and Sauces	\$248.1M	-1.2%	-1.5%	Dips and Sauces	\$3.3B	-0.7%	-1.1%
Trays	\$87.8M	-2.4%	-15.9%	Trays	\$1.2B	-1.5%	-1.5%
Spreads	\$79.2M	-3.2%	1.8%	Spreads	\$1.1B	-1.5%	-0.7%
Pickles/Relish	\$71.1M	19.7%	16.5%	Pickles/Relish	\$903.9M	9.1%	7.6%
Holiday Meals	\$170,176	6.2%	0.7%	Holiday Meals	\$31.3M	10.9%	1.4%

Deli Prepared

Deli prepared foods generated \$2.5 billion in September sales, with dollar sales increasing 0.7% and units declining 0.4%. Growth was led by appetizers (+5.1%), entrees (+3.0%), combo meals (+5.7%), and breakfast items (+2.8%), highlighting the continued importance of convenient meal solutions. Meanwhile, sandwiches (-1.7%), side dishes (-5.6%), pizza (-7.4%), and desserts (-8.0%) remained challenged.

September 2026

52WE 9/27/26

Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Deli Prepared	\$2.5B	0.7%	-0.4%	Deli Prepared	\$32.3B	3.4%	2.5%
Entrees	\$733.4M	3.0%	1.0%	Entrees	\$9.6B	7.9%	5.1%
Prepared Meats	\$502.6M	0.2%	0.2%	Prepared Meats	\$6.5B	0.4%	1.3%
Sandwiches	\$305.2M	-1.7%	-6.0%	Sandwiches	\$4.B	1.7%	2.2%
Salads	\$288.7M	0.5%	2.2%	Salads	\$3.7B	0.3%	-0.1%
Appetizers	\$204.5M	5.1%	4.1%	Appetizers	\$2.6B	6.0%	5.2%
Side Dishes	\$166.5M	-5.6%	-4.6%	Side Dishes	\$2.3B	0.0%	-0.3%
Soups & Chili	\$115.M	0.5%	-2.4%	Soups & Chili	\$1.5B	5.6%	2.9%
Pizza	\$88.9M	-7.4%	-5.0%	Pizza	\$1.2B	-1.7%	0.4%
Breakfast	\$45.7M	2.8%	7.6%	Breakfast	\$576.5M	0.5%	3.6%
Combo Meals	\$16.8M	5.7%	5.4%	Combo Meals	\$198.6M	5.3%	5.7%
Desserts	\$5.M	-8.0%	-9.5%	Desserts	\$79.M	1.1%	7.2%

DELI SALES

DELI CHEESE

Deli cheese sales reached \$690 million in September, with dollar sales increasing 2.1% and volume up 2.0%. Specialty cheese remained the primary growth driver, growing 4.3% in dollars and 3.5% in volume, reflecting ongoing consumer interest in premium and differentiated cheese offerings. Grab-and-go cheese also performed well, growing units 4.0%. In contrast, service cheese and pre-sliced cheese continued to face pressure, with both segments declining in dollars and volume.



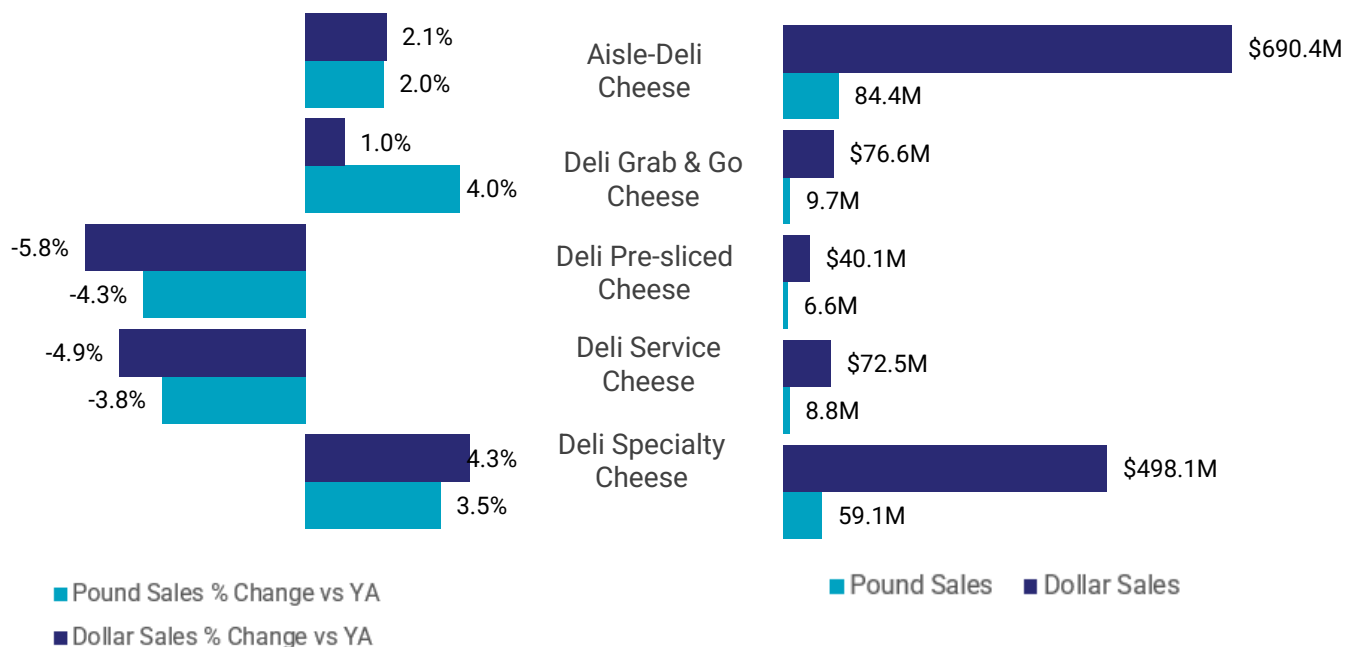
September 2026

52WE 9/27/26

Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA	Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Total Deli Cheese	\$690.4M	2.1%	2.0%	Total Deli Cheese	\$9.2B	2.0%	1.7%
Specialty	\$498.1M	4.3%	3.5%	Specialty	\$6.6B	3.9%	3.5%
Grab & Go	\$76.6M	1.0%	4.0%	Grab & Go	\$981.4M	2.2%	4.3%
Service	\$72.5M	-4.9%	-3.8%	Service	\$970.8M	-4.5%	-6.3%
Pre-sliced	\$40.1M	-5.8%	-4.3%	Pre-sliced	\$561.2M	-6.1%	-4.5%

Deli Cheese Overview

Dollars and Volume, 4WE 9/27/26



BAKERY SALES

BAKERY

Dollar sales were

\$3.7B

in September 2026



Bakery department sales totaled \$3.7 billion in September, with dollar sales declining 0.9% and units falling 2.4%. Both center store and perimeter bakery experienced softer performance, although center store bakery outperformed perimeter on dollar trends. Center store bakery sales declined 0.4% while units fell 3.1%. Perimeter bakery sales declined 1.1% with units down 0.6%. While consumers remain selective in discretionary bakery purchases, perimeter bakery continues to benefit from demand for fresh, premium, and occasion-driven offerings.

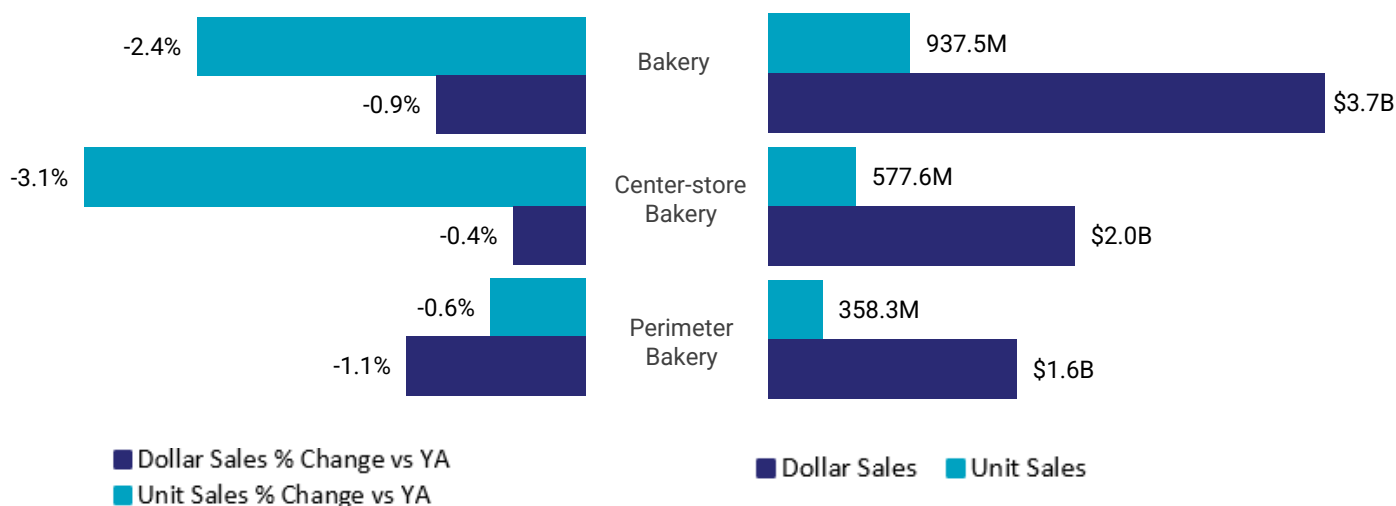
September 2026

52WE 9/27/26

Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Total Bakery	\$3.7B	-0.9%	-2.4%	Total Bakery	\$49.7B	0.9%	-1.6%
Center-store Bakery	\$2.0B	-0.4%	-3.1%	Center-store Bakery	\$26.8B	-0.1%	-2.8%
Perimeter Bakery	\$1.6B	-1.1%	-0.6%	Perimeter Bakery	\$22.7B	2.2%	0.5%

Bakery Overview

Dollars and Volume, 4WE 9/27/26



BAKERY SALES

CENTER AISLE BAKERY

Center Aisle Bakery

Center store bakery generated \$2.0 billion in September sales, with dollar sales down 0.4% and units declining 3.1%. Performance remained mixed across categories. Bagels/bialys (+5.4%), croissants (+13.8%), buns & rolls (+4.4%), and brownies/bars (+1.9%) were up from last year, suggesting consumers continued to seek premium and specialty bakery items. However, several categories remained challenged, including donuts (-14.7%), wraps/flatbreads (-16.1%), pies (-9.2%), muffins (-6.2%), and snack cakes (-5.6%). Overall, growth was concentrated among specialty and premium segments, while core bakery categories experienced softer demand.

September 2026

52WE 9/27/26

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Center Store Bakery	\$2.B	-0.4%	-3.1%
Breads & Rolls	\$1.5B	1.2%	-1.5%
Desserts/Sweet Snacks	\$270.3M	-3.4%	-6.0%
Morning Bakery	\$210.7M	-8.0%	-10.4%
Breads	\$865.1M	-0.5%	-3.5%
Buns & Rolls	\$452.1M	4.4%	2.5%
Bagels/Bialys	\$128.5M	5.4%	2.2%
Snack Cakes	\$99.6M	-5.6%	-6.8%
Cookies	\$80.4M	-1.4%	-3.5%
Muffins	\$80.2M	-6.2%	-10.1%
Donuts	\$75.7M	-14.7%	-15.7%
English Muffins	\$65.8M	-1.2%	-4.5%
Pastry/Danish/Coffee Cakes	\$54.8M	0.0%	-1.2%
Brownies/Squares/Bars	\$42.5M	1.9%	-1.8%
Cakes	\$28.4M	-3.8%	-9.9%
Wraps/Flatbreads	\$19.9M	-16.1%	-16.9%
Pies	\$19.4M	-9.2%	-9.0%
Croissants	\$13.0M	13.8%	11.2%

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Center Store Bakery	\$26.8B	-0.1%	-2.8%
Breads & Rolls	\$20.3B	0.1%	-2.2%
Desserts/Sweet Snacks	\$3.7B	0.3%	-4.5%
Morning Bakery	\$2.8B	-1.8%	-5.2%
Breads	\$11.4B	-0.6%	-2.9%
Buns & Rolls	\$5.9B	0.1%	-1.7%
Bagels/Bialys	\$1.7B	4.1%	1.4%
Snack Cakes	\$1.5B	2.0%	-2.5%
Donuts	\$1.1B	-0.2%	-4.4%
Cookies	\$1.B	1.5%	-4.6%
Muffins	\$996.7M	-4.1%	-8.5%
English Muffins	\$881.7M	0.0%	-3.8%
Pastry/Danish/Coffee Cakes	\$711.9M	-1.1%	-2.8%
Brownies/Squares/Bars	\$521.5M	2.6%	-1.0%
Cakes	\$387.3M	-7.0%	-11.9%
Wraps/Flatbreads	\$313.1M	6.9%	2.2%
Pies	\$266.5M	-6.8%	-7.0%
Croissants	\$162.8M	7.9%	2.9%

BAKERY SALES

PERIMETER BAKERY

Perimeter bakery — including both fixed and random weight

Perimeter bakery sales reached \$1.6 billion in September, with dollar sales declining 1.1% and units down 0.6%. Performance varied considerably by category. Dollar growth in fresh breads (+6.9%), cookies (+3.8%), croissants (+2.1%), and tortillas/wraps (+1.2%) reflect continued demand for fresh and premium bakery products. Meanwhile, muffins (-9.7%), bagels/bialys (-9.0%), pastry/Danish/coffee cakes (-8.8%), and pies (-3.8%) declined notably. The results reinforce the continued importance of fresh, indulgent, and occasion-based bakery purchases in driving perimeter bakery performance.

September 2026

52WE 9/27/26

Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Perimeter Bakery	\$1.6B	-1.1%	-0.6%	Perimeter Bakery	\$22.7B	2.2%	0.5%
Desserts/Sweet Snacks	\$854.6M	0.4%	2.5%	Desserts/Sweet Snacks	\$11.9B	1.6%	1.8%
Morning Bakery	\$409.9M	-6.0%	-4.3%	Morning Bakery	\$5.7B	2.9%	1.3%
Breads & Rolls	\$379.2M	1.3%	-0.4%	Breads & Rolls	\$5.1B	2.8%	-1.8%
Cakes	\$487.5M	-0.3%	0.7%	Cakes	\$6.6B	1.9%	1.9%
Cookies	\$247.6M	3.8%	7.6%	Cookies	\$3.4B	2.8%	2.3%
Donuts	\$145.1M	0.4%	-2.2%	Pastry/Danish/ Coffee Cakes	\$2.1B	1.9%	0.3%
Pastry/Danish/ Coffee Cakes	\$143.9M	-8.8%	-7.5%	Donuts	\$1.9B	4.3%	0.7%
Breads	\$142.1M	6.9%	0.8%	Breads	\$1.9B	8.6%	-2.1%
Muffins	\$120.9M	-9.7%	-4.0%	Muffins	\$1.7B	2.7%	3.7%
Buns & Rolls	\$90.3M	-3.6%	-3.4%	Pies	\$1.3B	-3.7%	-0.3%
Croissants	\$80.9M	2.1%	2.1%	Buns & Rolls	\$1.2B	-5.3%	-4.3%
Pies	\$75.1M	-3.8%	-0.5%	Croissants	\$1.1B	5.2%	1.4%
Brownies/Squares/ Bars	\$38.1M	-1.0%	-4.8%	Brownies/Squares/ Bars	\$517.7M	10.1%	5.4%
Tortillas/Wraps/ Flatbreads	\$34.1M	1.2%	1.3%	Bagels/Bialys	\$448.M	-3.5%	-0.9%
Bagels/Bialys	\$31.4M	-9.0%	0.1%	Tortillas/Wraps/ Flatbreads	\$440.5M	4.5%	3.7%
Specialty Desserts	\$6.3M	-10.3%	-2.8%	Specialty Desserts	\$98.5M	-19.3%	-3.3%



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
Q3 2026: 13 weeks ending 9/27/2026
September 2026: 4 weeks ending 9/27/2026



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

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