# Circana Deep Dive: Q3 2026

*IDDBA Member exclusive access!*
View recording and download slide deck at iddba.org. (Available in 24-48 hours)

IDDBA

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# 2026 Deep Dive Webinar Series:

- Aug 6th – Welcome!
- October 29th

[Link to register for the series]

**Circana and IDDBA Deep Dives: Beyond the Monthly News Report**

- **Go deeper** into food & beverage macro-economic and consumer landscape trends across retail & food service
- **Leverage** the consumer purchase drivers behind Dairy, Deli and Bakery retail sales performance
- **Explore** how IDDBA's guiding trends will reshape the future for Dairy, Deli and Bakery retailers, brands & suppliers

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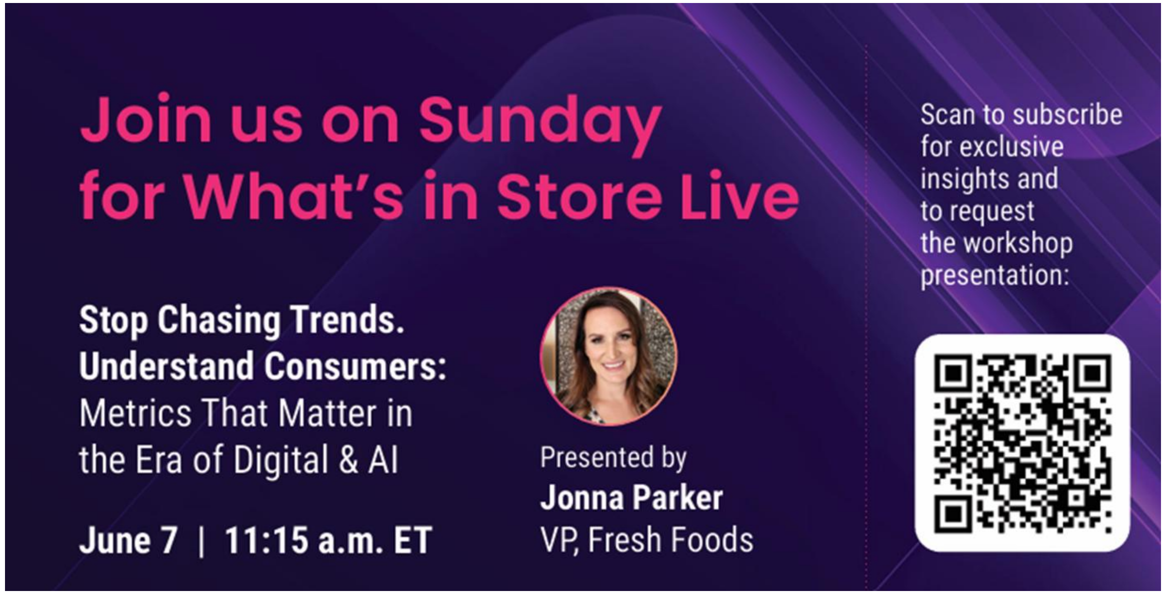
# Missed the 2026 IDDBA Show? Scan the QR to get a copy of the Circana presentations

CLICK HERE or

## Circana translating trusted insights into action at the IDDBA Show

# Circana solutions available for Dairy, Deli, Bakery

Learn more about how the Liquid Data Go Platform can easily on-ramp these solutions to support your business.

### Retail POS MULO+

The largest items/store/week-based POS coverage of food & beverage retail channels.

### Integrated Fresh Scan & Receipt Panel

The best source for understanding consumer behavior below the brand level and across channels calibrated to POS truth.

### Food Service Sales & Diner Trends

The most comprehensive source for monitoring consumer visits to commercial and non-commercial foodservice locations for market share tracking across the total foodservice industry.

### National Eating Trends®

Continuously tracks data from National Eating Trends panelists reporting how they manage their health and wellness with a focus on food and beverage choices, dieting, nutrition, and emerging behaviors.

### Purchase to Consumption

Know what happens after the shelf – only source ever to track consumers from buying an item through to how, when and with whom do they eat it

Interested in insights from this session?
CLICK HERE or

*Including a discount for IDDBA members new to Circana*

# Today's agenda

- Macroeconomic & Food/Bev Trends
- Dairy, Deli, Bakery Performance
- 2026 IDDA Show Recap

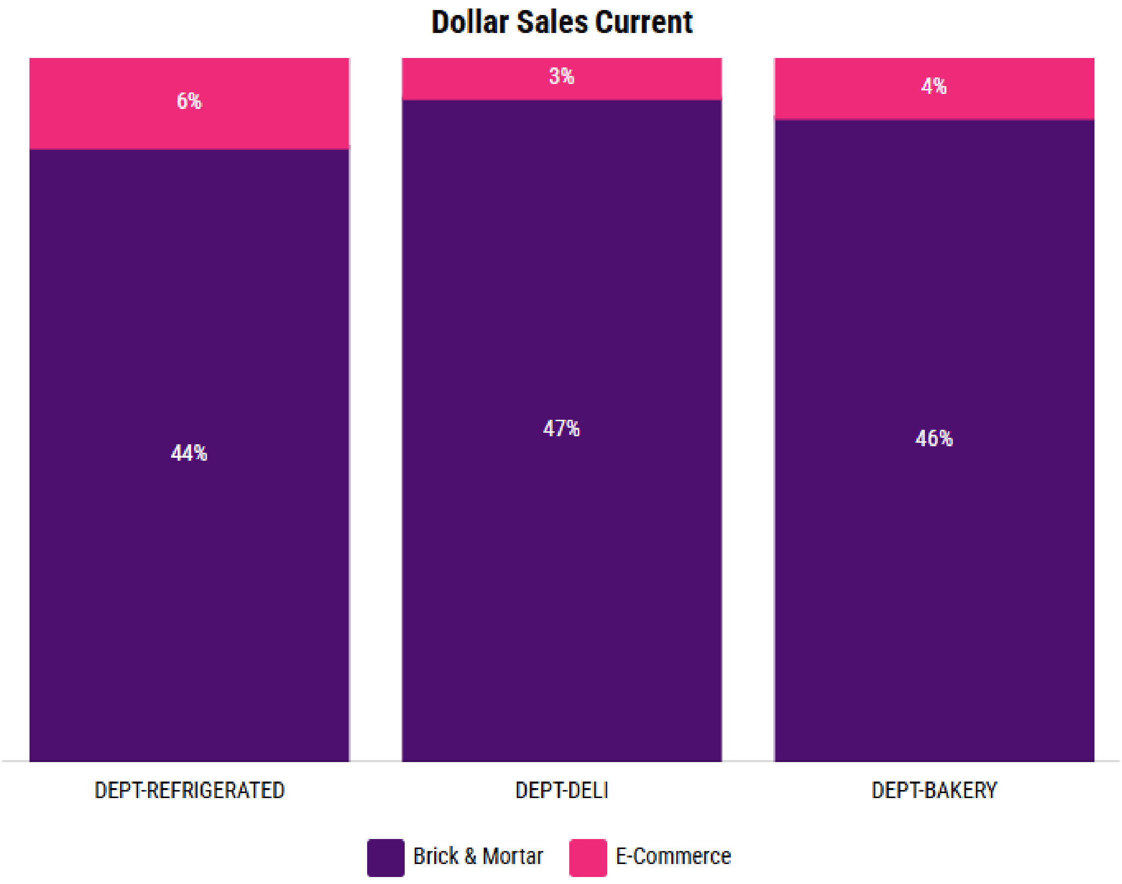
# Perishables Growth Remains Resilient as Consumers Prioritize Fresh Across Meals and Occasions

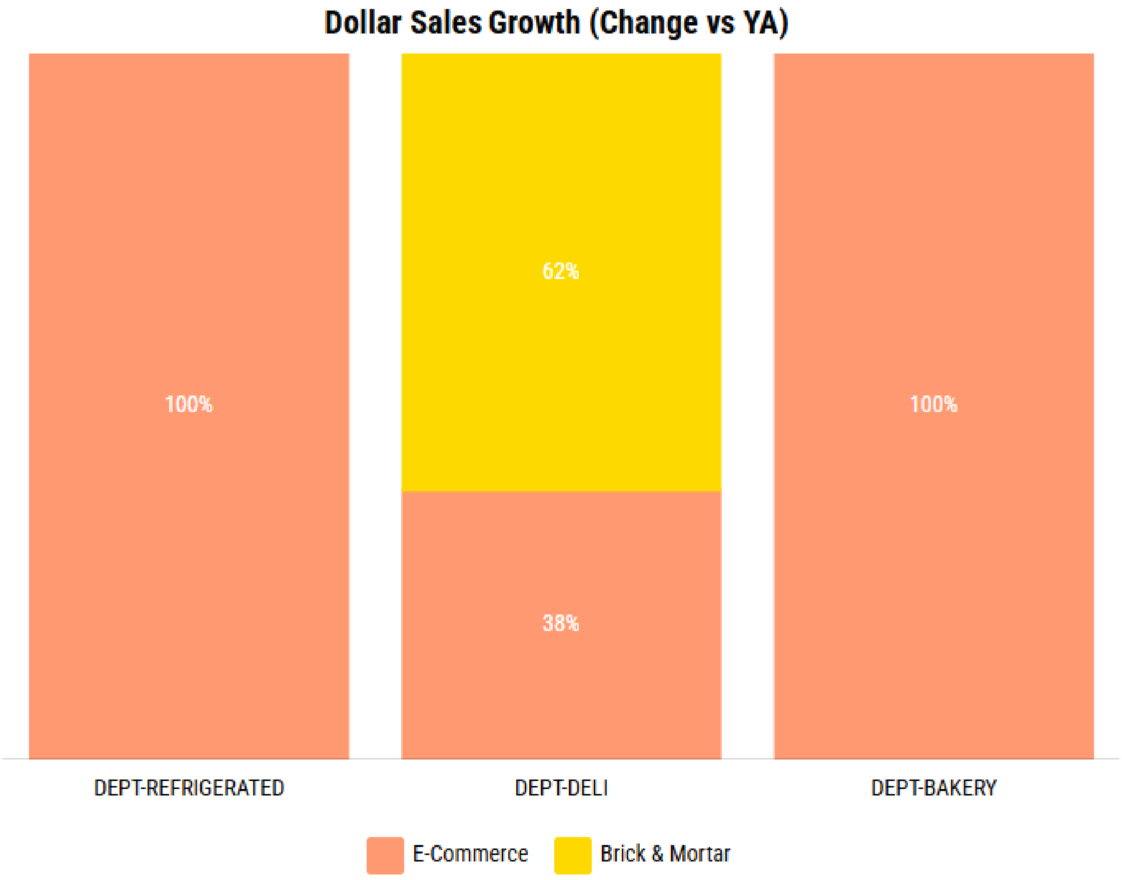
| | % of YTD Sales | % Contribution to Market $ Growth | Fair Share |
|---|---|---|---|
| Food Traditional | 42.2% | | 0 |
| Food Natural | 2.4% | | 0 |
| Food Value | 8.0% | 9.8% | 123 |
| Total US Mass | 19.0% | 20.0% | 105 |
| Club | 13.0% | 27.6% | 213 |
| Internet | 3.9% | 29.9% | 759 |
| Specialty Stores | 7.3% | 8.0% | 110 |
| All Other | 4.2% | | 111 |



Source: OmniConsumer Integrated Fresh, All Outlets, Perishables, Latest 52weeks data ending 7/12/2026

# IDDBA departments see growth is overall driven by **E-Commerce sales** – Deli needs development




Source: MULO+ Integrated Fresh Point of Sale, latest 52 weeks ending 5-17-26

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# Fresh Sales Growth Is Increasingly Concentrated Among High-Utility, Protein-Led Categories

| Department | Sales: Dollars | Sales: Units | $ Sales % Chg | Vol/Unit Sales % Chg | Price Per Vol/Unit | Price Per Vol/Unit % Chg |
|---|---|---|---|---|---|---|
| TOTAL EDIBLE | $971B | 223.6B | 2.5% | 0.2% | $4.34 | 2.3% |
| DEPT-GENERAL FOOD | $265.5B | 74.2B | 2.7% | -0.5% | $3.58 | 3.2% |
| DEPT-BEVERAGES | $129.9B | 28.6B | 6.8% | 1.1% | $4.54 | 5.6% |
| DEPT-MEAT* | $114.5B | 15.2B | 5.3% | 0.9% | $4.84 | 4.4% |
| DEPT-REFRIGERATED | $104.4B | 27.6B | -2.8% | 1.0% | $3.78 | -3.7% |
| DEPT-PRODUCE* | $98.1B | 34.7B | 2.0% | 0.8% | $1.89 | 1.2% |
| DEPT-FROZEN | $88.8B | 16.6B | 2.1% | -0.2% | $5.36 | 2.2% |
| DEPT-DELI | $56.5B | 9B | 3.1% | 2.0% | $6.27 | 1.1% |
| DEPT-BAKERY | $49.7B | 12.6B | 1.1% | -1.4% | $3.94 | 2.6% |
| DEPT-LIQUOR | $44.2B | 3.5B | -2.3% | -2.4% | $12.71 | 0.1% |
| DEPT-FLORAL | $10.5B | 964.8M | 4.8% | 0.8% | $10.89 | 4.0% |
| DEPT-SEAFOOD* | $8.9B | 824.5M | 2.3% | -0.4% | $9.94 | 2.7% |

*Vol/LBs
Exceeding TOTAL EDIBLE Trends highlighted

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Source: Circana Integrated Fresh, Total US MULO+, Latest 52weeks ending 7/12/2026

*Note: This is before the expanded news and social media chatter on cyclospora, Circana is seeing an impact to produce and fresh foods in the last two weeks (7/13-7/26/26) and will continue to monitor the situation closely*

# Fresh Continues to Win Wallet Share Through Strong Household Engagement and Everyday Relevance

| Department | HH Penetration | | $ Per Buyer | | Product Trips/Buyer | | Unit Sales/Trip | |
|---|---|---|---|---|---|---|---|---|
| TOTAL EDIBLE | 100 | -0.0 | $8,206.37 | +2.3% | 223.6 | +2.1% | 8.9 | -1.4% |
| DEPT-MEAT | 98.3 | -0.0 | $928.25 | +4.7% | 55.1 | +1.8% | 2.2 | -0.5% |
| DEPT-REFRIGERATED | 99.5 | +0.0 | $844.85 | -2.6% | 79.0 | +0.8% | 3.1 | +0.4% |
| DEPT-PRODUCE | 99.1 | +0.0 | $791.89 | +1.6% | 84.7 | +0.4% | 3.1 | -0.4% |
| DEPT-DELI | 98.5 | +0.0 | $664.87 | +2.1% | 55.0 | +1.0% | 1.7 | +0.0% |
| DEPT-BAKERY | 99.5 | -0.0 | $424.36 | +1.1% | 63.2 | -0.6% | 1.8 | -0.3% |
| DEPT-SEAFOOD | 55.1 | +0.4 | $132.86 | +0.6% | 8.6 | -0.7% | 1.3 | -0.4% |

Exceeding TOTAL EDIBLE Trends highlighted



Source: Circana Integrated Fresh Panel, Total US All Outlets, Latest 52weeks ending 7/12/2026

*Note: This is before the expanded news and social media chatter on cyclospora, Circana is seeing an impact to produce and fresh foods in the last two weeks (7/13-7/26/26) and will continue to monitor the situation closely*

# Fresh Foods Top 15 Categories by Absolute Dollar Change

Beef generated more than $4.2B in incremental sales, making it the largest driver of fresh growth.

Protein remains the primary growth engine, with Chicken, Deli Entrees, Seafood and Grab & Go solutions among the top gainers.

Convenience and meal solutions continue to resonate, fueling strong gains across prepared deli categories.

Select produce items, including Berries, Kiwis and Sweet Potatoes, delivered outsized growth as consumers balance health, flavor and versatility.

- Abs $ Sales Change vs YA
- Volume* or Unit % Chg vs YA

| | Category | Abs $ Sales Change vs YA | Volume* or Unit % Chg vs YA |
|---|---|---|---|
|  | Beef | $4.2B | 2.1% |
|  | Chicken | $926.8M | 3.0% |
|  | Deli Entrees* | $691.3M | 5.2% |
|  | Fresh Berries | $370.1M | 0.6% |
|  | Fresh Finfish | $293.9M | 2.9% |
|  | Deli Specialty Cheese | $284.4M | 4.1% |
|  | Rfg Juices/Drinks | $242.3M | -2.6% |
|  | Fresh Lettuce | $230.5M | -3.4% |
|  | Fresh Tomatoes | $225.1M | 0.3% |
|  | Dinner Sausage | $223.5M | 1.9% |
|  | Perimeter Cakes | $201.1M | 2.7% |
|  | Pork | $194.1M | 0.2% |
|  | Deli Grab & Go Lunchmeat | $187.2M | 6.6% |
|  | Fresh Kiwis | $181.1M | 26.2% |
|  | Fresh Sweet Potatoes/Yams | $175.9M | 18.1% |

Source: Circana Integrated Fresh, Total US MULO+, Latest 52*weeks* ending *7/12/2026*

*Note Units* used when volume is not equivalized at the dept level. Beverages, Meat, Produce and Seafood are in volume.*

# Circana & IDDBA

**Circana is the exclusive retail & shopper sales data provider for IDDBA**

Members can interact with retail data refreshed monthly:

IDDBA Website -> Integrated Fresh by Circana: IDDBA Retail & Trends Insights

## Integrated Fresh: Circana Unify+ for IDDBA

### U.S. Retail Sales Trends: Circana Unify+ for IDDBA

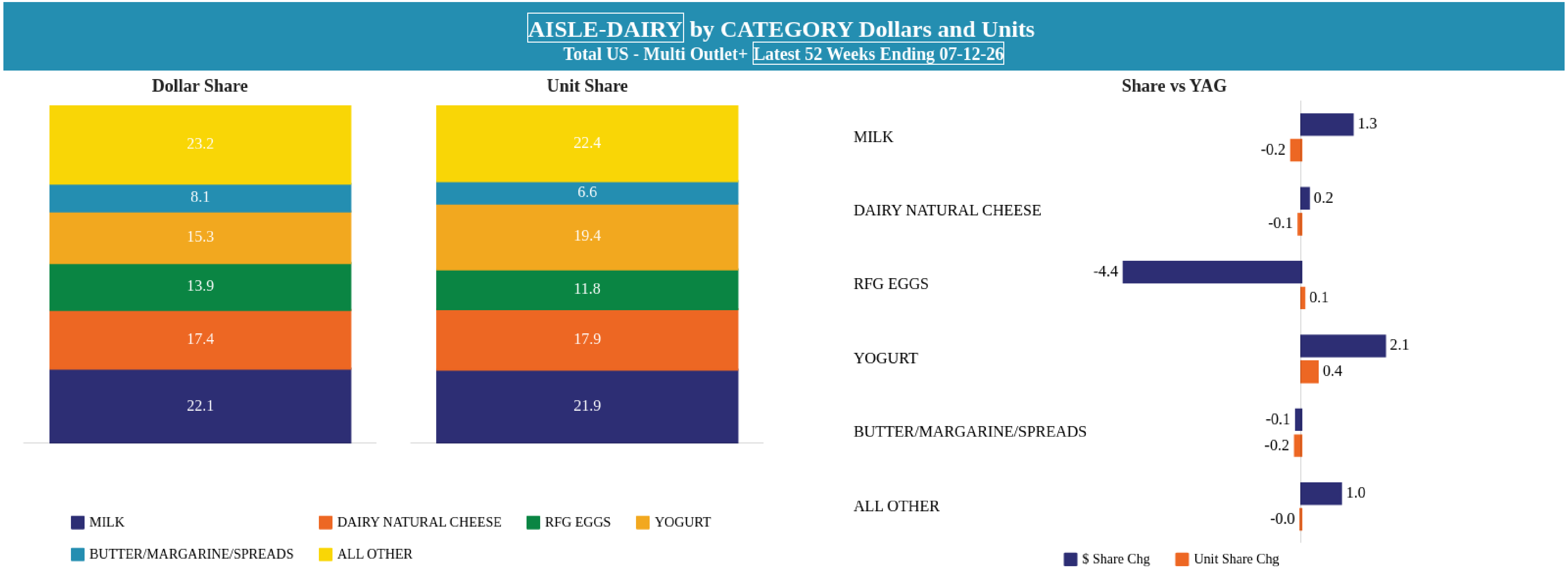
IDDBA partners with Circana to provide members with a powerful, dynamic online reporting platform delivering U.S. retail sales insights derived from the largest and most comprehensive point-of-sale data set. Powered by the Integrated Fresh product hierarchy, developed in partnership with IDDBA, the platform combines all items, including fresh random-weight, to accurately reflect department- and category-level performance across Dairy, Deli, and Bakery. Connected directly to Circana's live retail POS database, the Circana Unify for IDDBA portal offers interactive, visual reporting, including trend analysis, category dynamics, and flavor heatmaps, making it an ideal complement to the market measurement tools your company already uses.

Get started now. Your IDDBA login grants you access to Circana Unify+ for IDDBA reporting to explore real-time category insights and uncover your next growth opportunity.

Access Data Portal (Desktop)

Access Data Portal (Mobile)

# Dairy Continues to Deliver Steady Growth Through Everyday Essentials



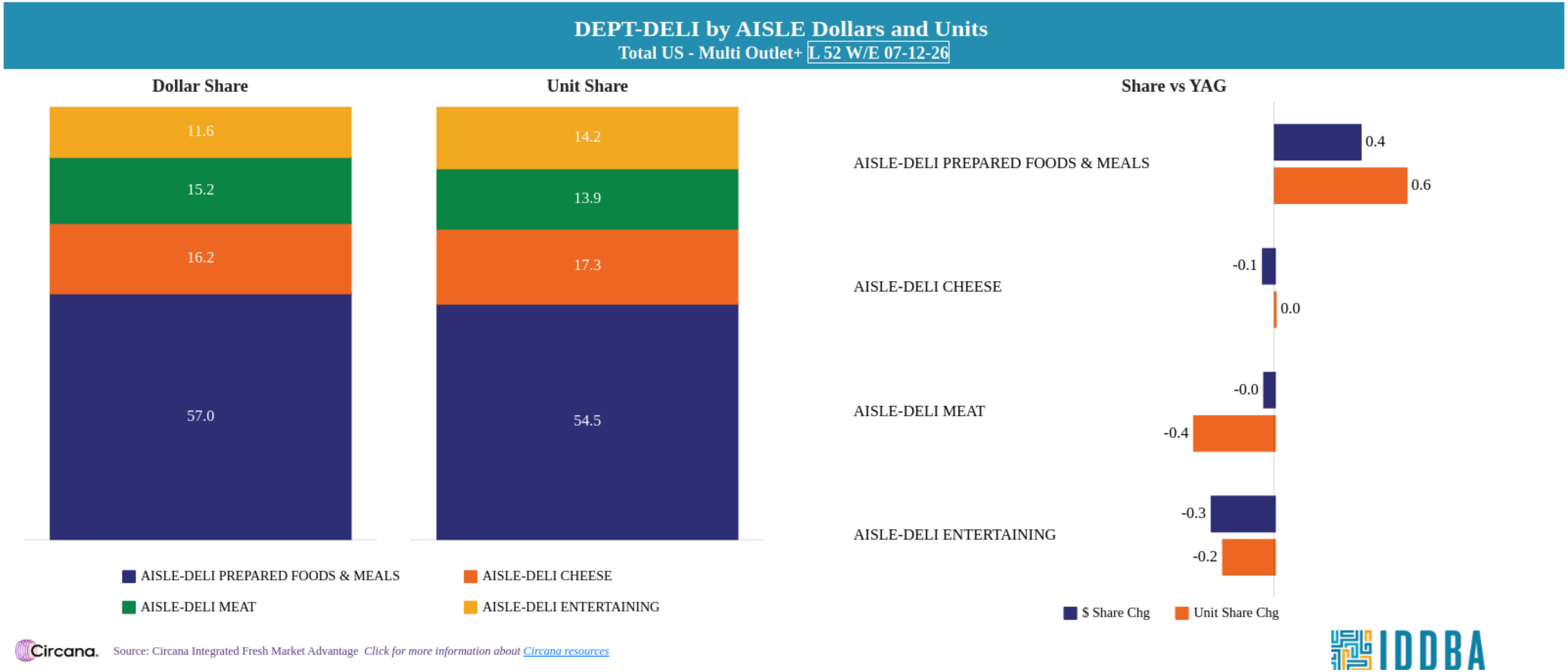

Adjust Category Share Threshold 80.0 All Other includes RFG CREAMS/CREAMERS, CREAM CHEESE, RFG WHIPPED TOPPINGS, DAIRY PROCESSED CHEESE, COTTAGE CHEESE, SOUR CREAM, RFG DESSERTS, RFG CHEESE SNACK KITS and DAIRY ALTERNATIVE CHEESE

Source: Circana Integrated Fresh Market Advantage *Click for more information about Circana resources*



*Source: Circana Integrated Fresh, Total US MULO+, L52 WE 7/12/2026*

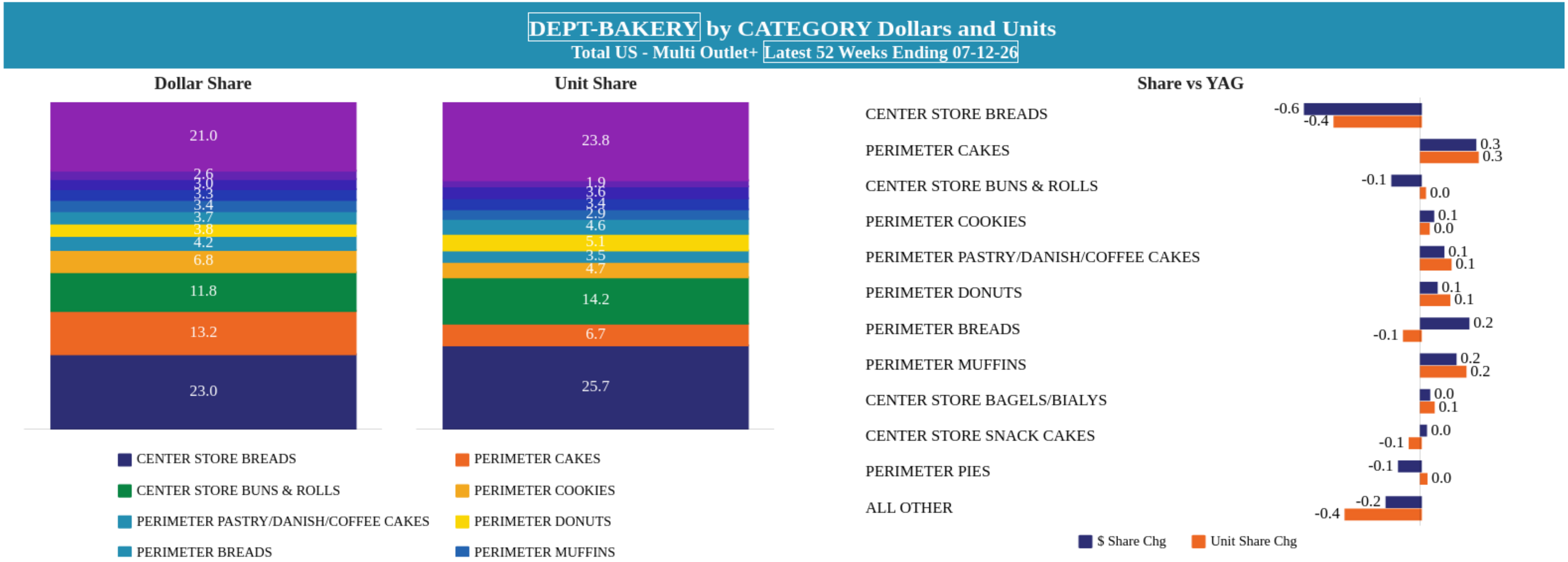
# Prepared Entrees Lead Deli Growth Through Protein and Convenience




Circana, Inc. and Circana Group, L.P. | For public use

*Source: Circana Integrated Fresh, Total US MULO+, L52 WE 7/12/2026*

# Bakery Faces Volume Headwinds as Consumer Preferences Evolve




Adjust Category Share Threshold 80.0 All Other includes PERIMETER BUNS & ROLLS, CENTER STORE DONUTS, PERIMETER CROISSANTS, CENTER STORE COOKIES, CENTER STORE MUFFINS, CENTER STORE ENGLISH MUFFINS, CENTER STORE PASTRY/DANISH/COFFEE CAKES, CENTER STORE BROWNIES/SQUARES/BARS, PERIMETER BROWNIES/SQUARES/BARS, PERIMETER BAGELS/BIALYS, CENTER STORE CAKES, PERIMETER TORTILLAS/WRAPS/FLATBREADS, CENTER STORE PIES, CENTER STORE WRAPS/FLATBREADS, AO PERIMETER, CENTER STORE CROISSANTS, PERIMETER SPECIALTY DESSERTS, PERIMETER INGREDIENTS and PERIMETER ENGLISH MUFFINS

Source: Circana Integrated Fresh Market Advantage *Click for more information about* *Circana resources*



*Source: Circana Integrated Fresh, Total US MULO+, L52 WE 7/12/2026*

# Total Bread Sales are $25.4B but Units have declined 158.5M (-2.1%) despite Dollar Growth of $82M (+0.3%)

In the L52 weeks both Center Aisle Bakery units (-2%) and Perimeter Bakery units (-2%) have declined

The Perimeter has been especially affected by pricing as the Price Per Unit has increased +5% while Incremental Unit Sales have dropped -11% YOY

**Generational Interest**

**Boomers** have the highest Bread unit purchase index at **113** with each generation showing additional dropoff (Gen X- 102, Millennials- 90, Gen Z- 68)

Source: Circana Market Advantage and Integrated Fresh Panel L52 Weeks Ending 7/12/26

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# Circana Deep Dive

## Key Themes Seen at 2026 IDDBA Show

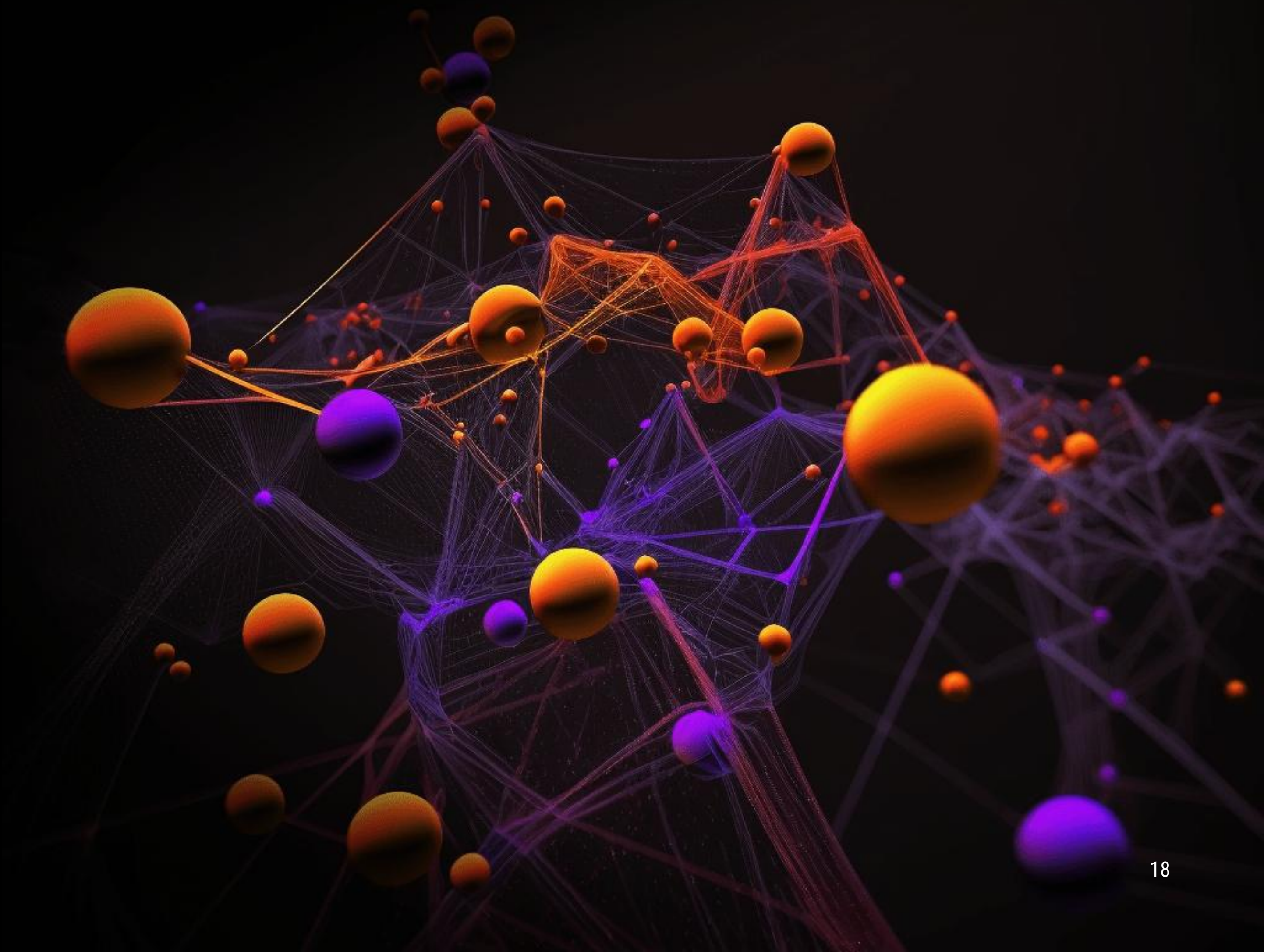
## Orlando, FL

*IDDBA Member exclusive access!*
View recording and download slide deck at iddba.org. (Available in 24-48 hours)

# Key Themes Seen at IDDBA

| 01 | 02 | 03 | 04 | 05 |
|---|---|---|---|---|
| Protein | Convenience | Nostalgia | Solution vs Product | Personalization |

# Protein Everywhere



# Dairy
## Protein quest drives growth

**$90.0B**
L-52 week sales

**+0.7%**
Dollars vs. YA

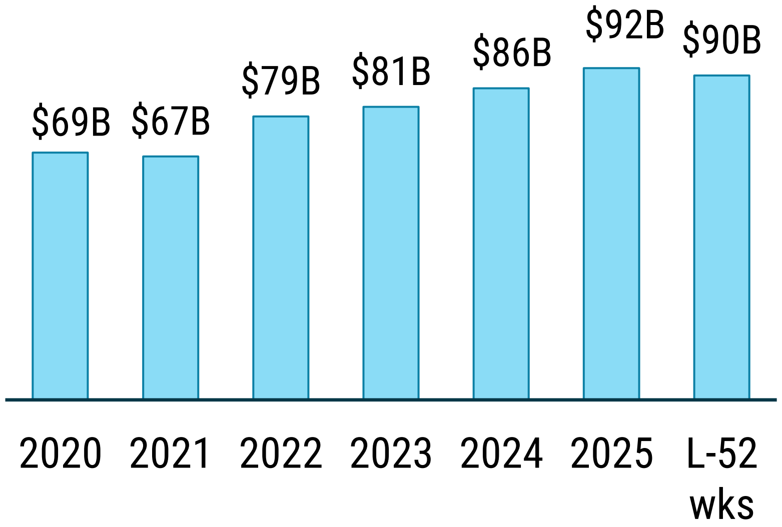
**+1.7%**
Units vs. YA

### Dairy dynamics

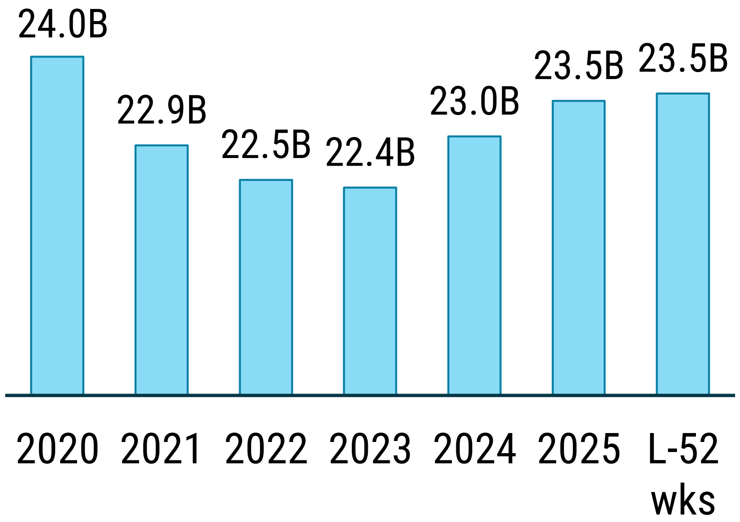
- 99.4% households buying
- 72 annual trips/buyer
- 2.9 units/trip
- 211 units/buyer/year
- $725 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

**Dairy dollar sales**




**Dairy unit sales**




### Winning categories in absolute YOY unit growth

**Yogurt | $13B**

4.6B units
+214M
+4.9%

**Cottage cheese | $2B**

639M units
+73M
+12.9%

**Eggs | $14B**

2.8B units
+48M
+1.8%



Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

# Viral fame paid off for cottage cheese

## The most Googled recipe delivered double-digit gains for all components


### Sales and shopping dynamics

| | Dollar sales vs. YA | Pound sales vs. YA | Households buying vs. YA | Trips vs. YA |
|---|---|---|---|---|
|  | +19.4% | +15.1% | ↑ | ↑ |
|  | +14.7% | +3.1% | ↑ | ↑ |
|  | +17.3% | +12.6% | ↑ | ↑ |

Source: Google Trends | Circana, Integrated Fresh, Total U.S., 52 w.e. 4/26/2026

# 60% follow some type of lifestyle diet
## Protein reigns supreme among specific diet types

### General/balanced approach

**40%** No particular way of eating

**28%** Balanced diet

### Type

**12%** Intermittent fasting

**9%** Diet to manage/ avoid health condition

**5%** WW, Jenny Craig or other diet plans

### Ingredient/production method

**18%** High protein/athletic performance/carnivore

**17%** Tracking calories or macros

**16%** Tracking sodium/salt

**12%** Organic/clean eating

**10%** Tracking fat/saturated fat

**10%** Low/no carb diets, incl. Keto

**7%** Gluten-free

**6%** Vegetarian/vegan

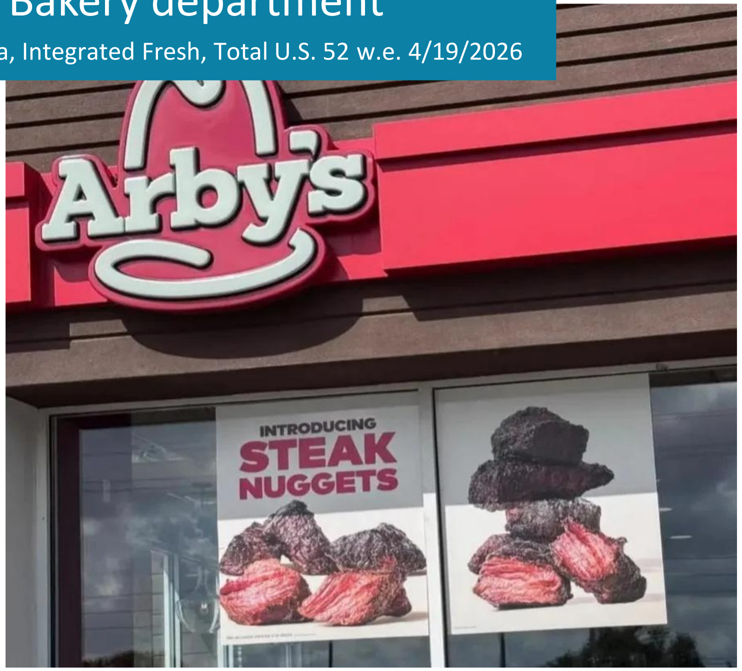
**3%** Kosher

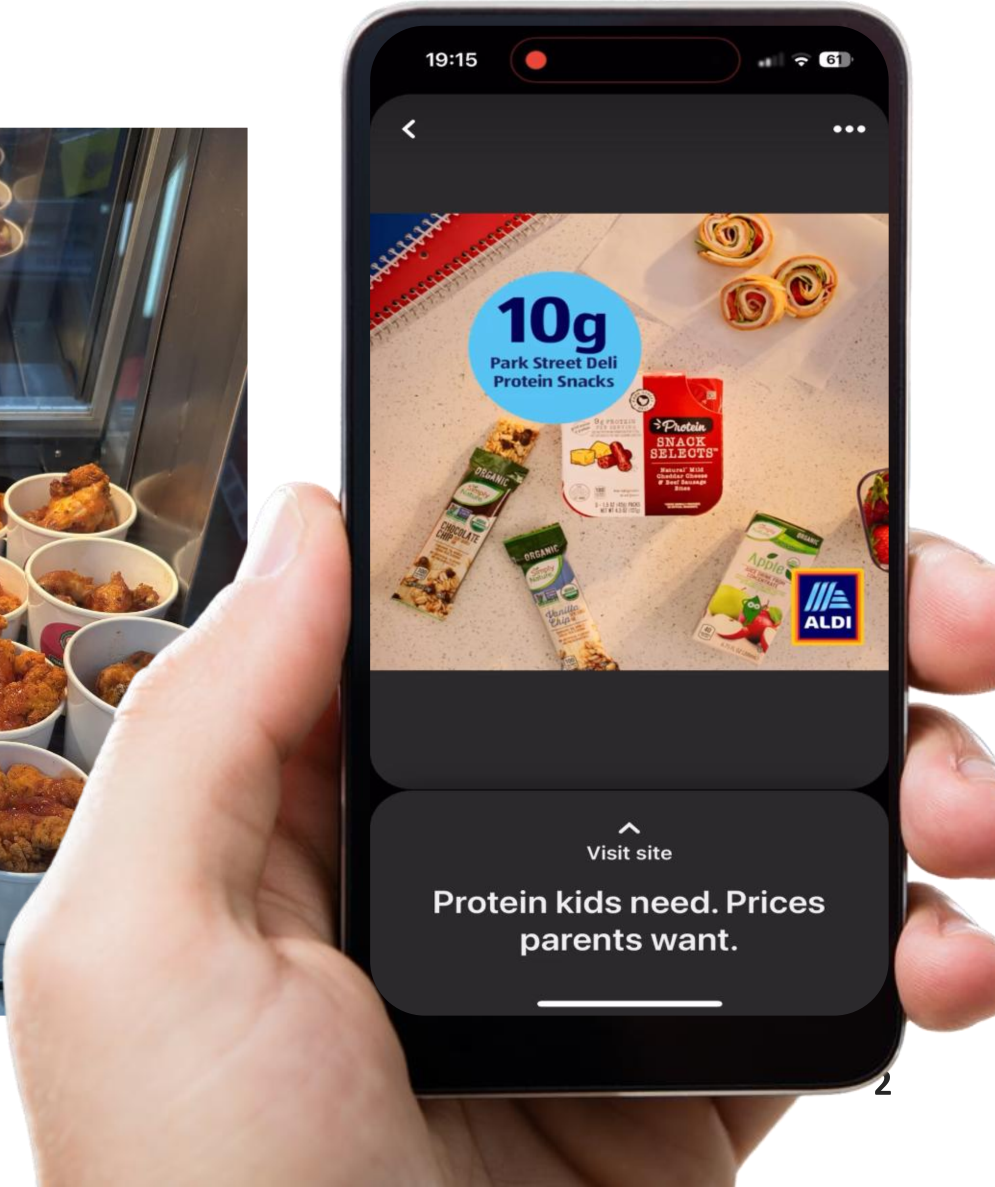
**Top diet by generation:**

- Gen Z: High protein
- Millennials: High protein
- Gen X: Balance
- Boomers: Balance

# Rising opportunity in protein snacking
## Prominent trend in restaurant foodservice

**Protein claim unit growth:**
**+27.5%** Deli department
**+2.2%** Dairy department
**+80.4%** Bakery department
Source: Circana, Integrated Fresh, Total U.S. 52 w.e. 4/19/2026

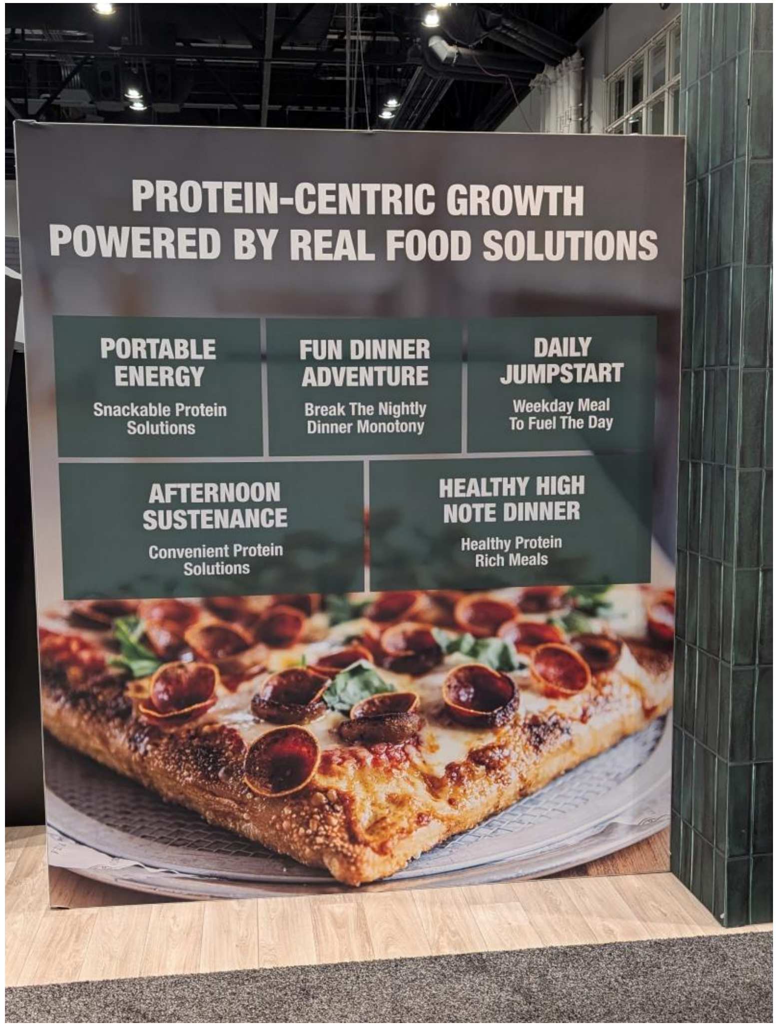



Pictures: 210 Analytics

# Protein isn't Going Anywhere

Protein is featured as a prominent value-add across every occasion:  breakfast, lunch, snacking, dinner ,and even as an added ingredient for coffee.





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# Balanced, Healthy Enjoyment

Taste (F&B) or effectiveness (non-food) remains the top attribute consumers look for in new CPG products; 80% of consumers highlight this main attribute followed by price value (75%). Health and convenience follow closely with winning products finding the balance.

01

**"Healthy enough"** – Justifying indulgence often using favorite flavors in a healthier category or with healthier ingredients. Frozen fruit with candy coating, dessert-like flavors, portion-controlled, high protein & lower sugar sweets.

**Reformulating no sugar** – "Zero" sugar versions or the main recipe, more complex sweetener formulas balancing natural and/or artificial sweeteners and no-sugar-added.

**Expanding protein** – Still the #1 desired attribute sought in new products, high protein offerings in many categories with front-of-package protein focus.

*Source: Circana New Product Survey, March 2026.*

# New products layering indulgent classics with health and convenience factors

**Year 1 Sales**


**$45.2 M**

**Golden West Chocolate Covered Frozen Fruit Treats**
*Real fruit with renowned chocolate flavors; bite-size indulgence*


**$34.7 M**

**Chobani Creations**
*Inspired by dessert with whole milk yogurt & all natural ingredients*


**$24.0 M**

**Sargento Fun! Balanced Breaks**
*Sargento cheese snack paired with cookies or fruit snacks*


**$44.6 M**

**Belgian Boys Bite Sized Pancakes**
*Refrigerated and quick to heat; made with simple, non-GMO ingredient*


**$74.2 M**

**Fruit Riot!**
*Real fruit, unreal flavors*


**$7.5 M**

**Think! Minis**
*100 calories, 6g protein, 3g sugar, gluten-free*


**$26.3 M**

**Quest Bake Shop**
*Muffins, brownies, cookies and donuts high protein, low sugar*


**$8.2 M**

**KIND Kids School Friendly**
*Kid-friendly flavors, safe for school (nut-free), 5g protein and 100% whole grains*

- Frozen fruit with candy coating
- Dessert-like flavors
- Bite size portion control
- Parent-friendly
- High-protein, low sugar treats

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*Source: Circana Total Store View, Total U.S. MULO+, Custom 13 Quad-Week Time Periods Based on NPP 25% ACV Benchmark. Descriptions based on product websites.*

# Protein leads in attributes consumers seek in new products; now spread to more categories

## Pacesetter Examples


**#1** Important attribute for new food & beverage decisions, cited by 45% of respondents

## Top F&B Categories Contributing to Protein Claim Growth

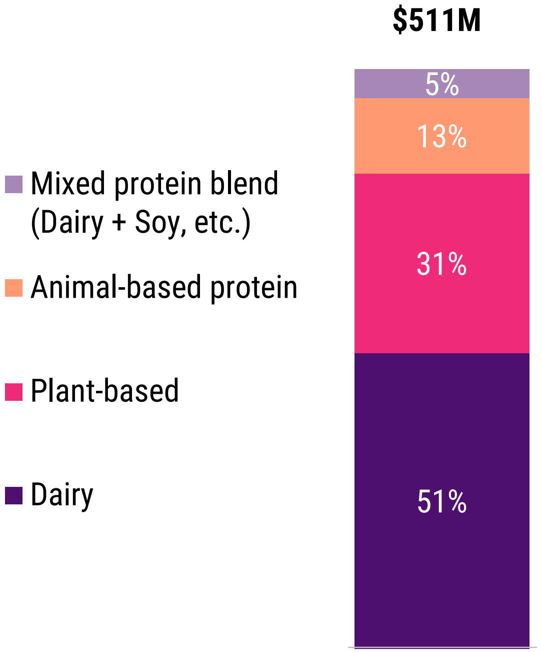
| | Category % contribution to protein claim $ growth | Protein claim % of cat. $ | Protein claim % of cat. growth |
|---|---|---|---|
| Yogurt | 33 | 31% | 54% |
| Fz Processed Chicken | 25 | 48% | 113% |
| Weight Control | 19 | 68% | 35% |
| Dried Meat Snacks | 13 | 62% | 46% |
| Snack Bars/Granola Bars | 11 | 38% | 37% |
| Cereal | 9 | 8% | 146% |
| Cottage Cheese | 9 | 61% | 67% |
| Milk | 7 | 12% | 71% |
| Beef | 7 | 3% | 3% |
| Salty Snacks | 4 | 2% | 35% |
| All other categories | 37 | 4% | -5% |
| Protein Claim Total | 100 | 6% | 8% |

*Source: Circana New Product Survey, March 2026. Protein front-of-package claim, table is total F&B, Circana MULO+ with Conv, 52 weeks ending 4/19/26.*

# Protein claims enabled by evolving formats & ingredients

21 F&B NPPs have some type of Protein claim (15.5% of dollars)
18 leverage front of package communication with 14 claiming 10g+/serving, a known loyalty driver

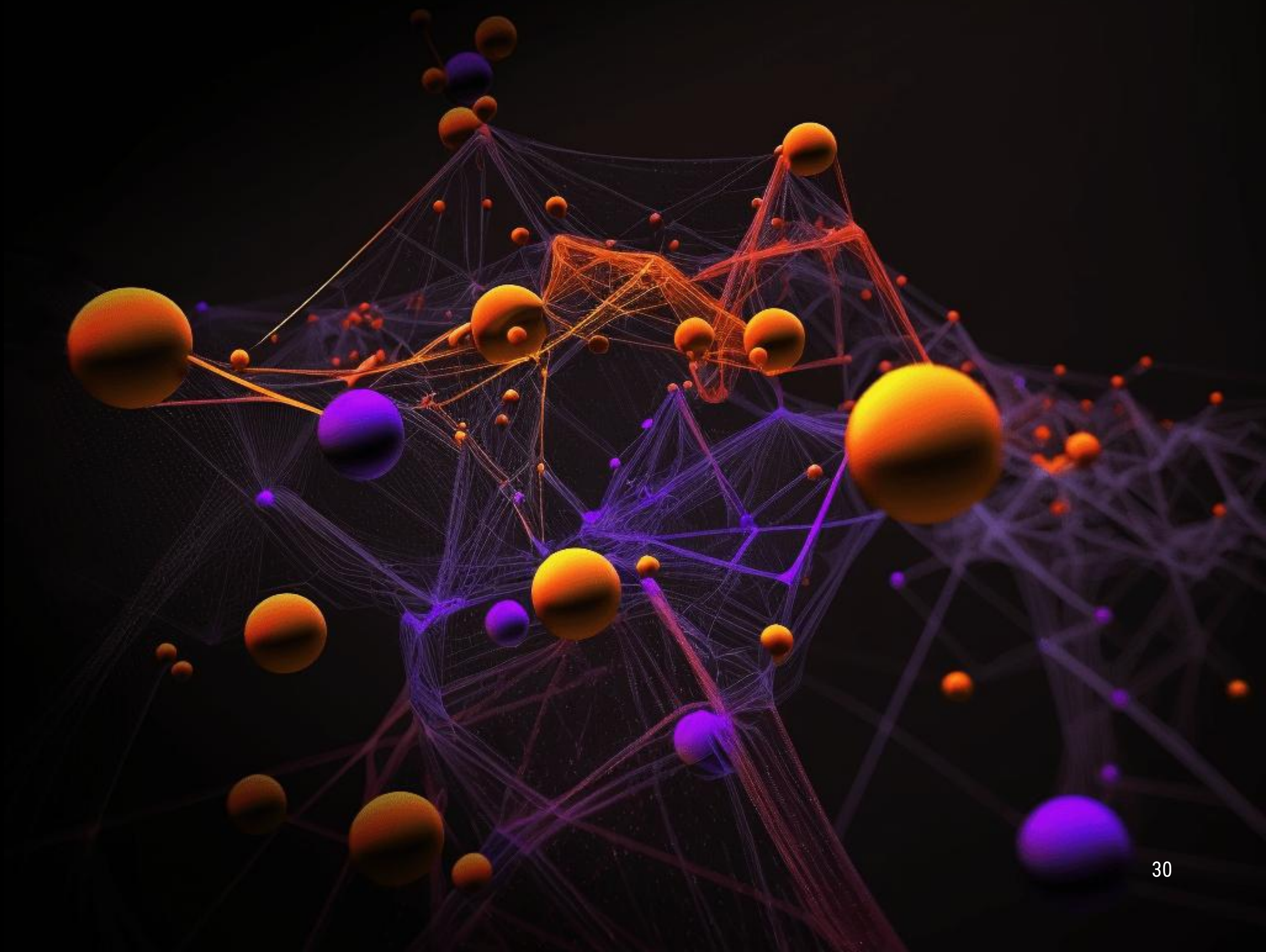
## Primary Protein Source




## Pacesetter Examples


*Source: Circana Total Store View, Total U.S. MULO+, Custom 13 Quad-Week Time Periods Based on NPP 25% ACV Benchmark*

# On-the-Go



# Deli prepared
## Replacing restaurant trips

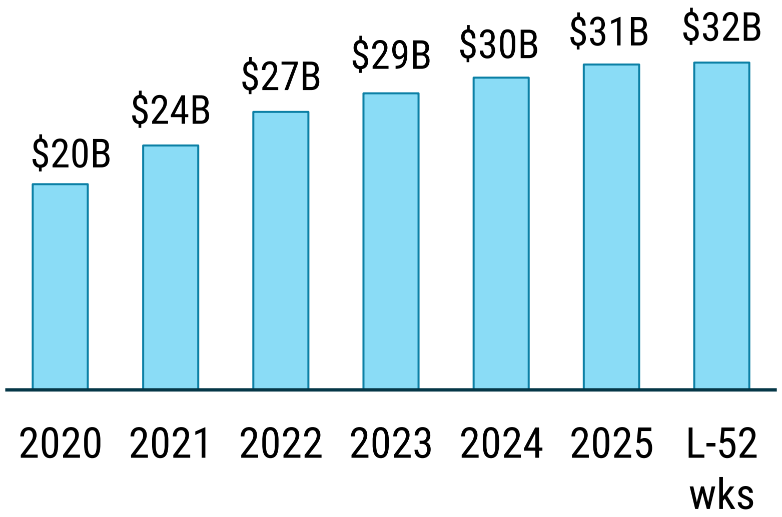
**$31.7B** L-52 week sales | **+3.7%** Dollars vs. YA | **+3.3%** Units vs. YA

### Deli prepared dynamics

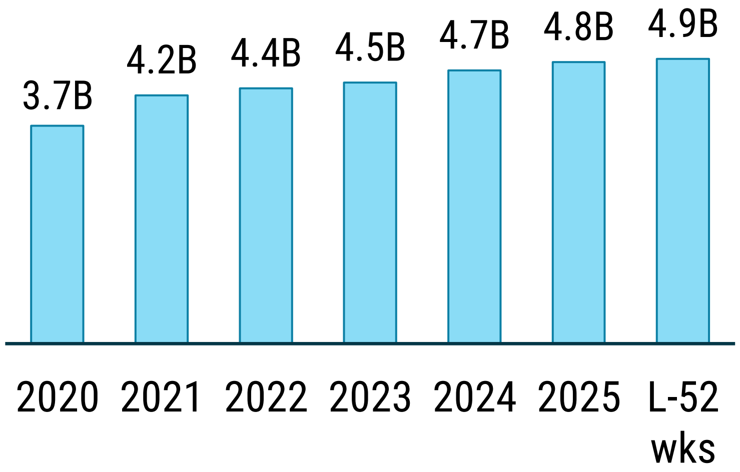
- 94.6% households buying
- 12.3 annual trips/buyer
- 1.5 units/trip
- 60.4 units/buyer/year
- $104 per buyer/year

Source: Circana, Household Panel, 52 w.e. 3/22/2026

### Deli prepared dollar sales




### Deli prepared unit sales




### Winning categories in YOY absolute unit growth

**Entrees| $9.2B**

1.1B units
+52.6M
+4.9%

**Sandwiches | $3.9B**

682M units
+49.7M
+7.9%

**Appetizers | $2.5B**

372M units
+23.1M
+6.6%

**Prep. meat | $6.5B**

964M units
+19.8M
+2.1%



Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 3/29/2026

# Deli is stepping up as a restaurant replacement

## It's about great taste and value

**18%**

of consumers are purchasing deli-prepared food and meals more often than last year

**% more often:**

**33%** Gen Z
**25%** Millennials
**13%** Gen X
**8%** Boomers

**29%** Well-off
**7%** Struggling

**Reasons for purchasing deli-prepared foods more often**

**47%** Great tasting food
**47%** Great value
**33%** Time-saving convenience
**31%** Ability to select exactly what I like
**30%** Replacing restaurant meals/food
**30%** Better prices and promotions than before
**27%** Replacing items/meals I typically cook from scratch
**26%** Ability to purchase just as much as I need
**23%** Buy different things for different people
**19%** New consumption occasion, like breakfast or lunch
**18%** Store added new items/expanded assortment
**15%** No specific reason, simply buying more

# Deli Prepared Offerings Shift with Consumer Preferences



# Combined market and demographic forces will result in 360° of change

**To understand the trends, we have to understand the who**

1. Who is driving sales today?
2. Who is driving the growth fueling sales tomorrow?
3. What are the differences in their approach to buying groceries/making meals?

**Gen Z over index for:**

- Meal adventures/global cuisines, resulting in different items/brands purchased
- Interest in speedy meals and lunchbox solutions
- Ready-to-heat and ready-to-cook
- Functional health benefits
- Production claims like organic, natural, non-GMO, grass-fed, etc.
- Sustainability influence on purchase
- Retailers and brands who align with their values
- Over-index for supercenters, clubs and online

# Retailers want more snacking

Individually wrapped and smaller packaged items were on display; Convenience is key for Grab 'n Go sections of the store



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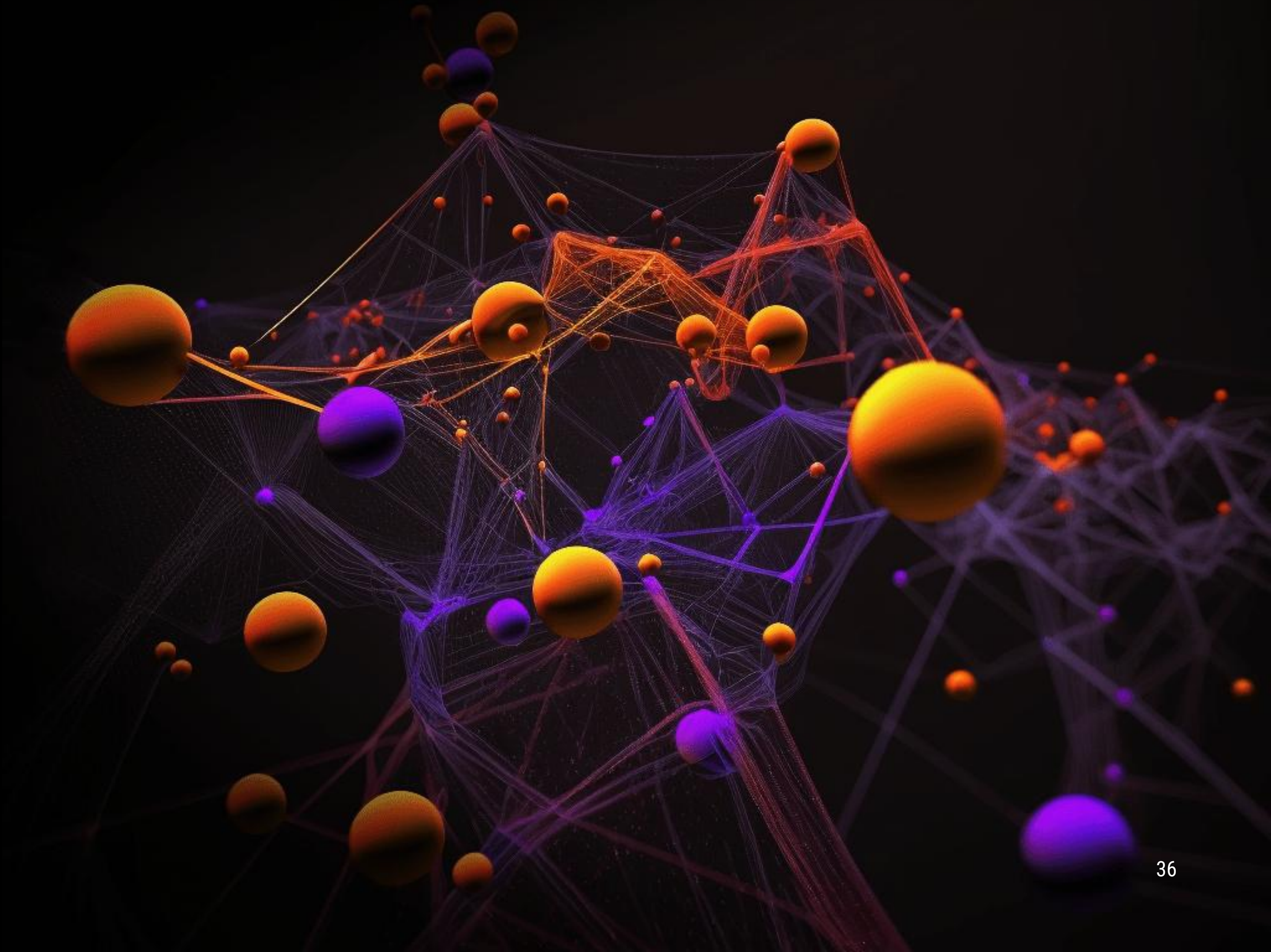
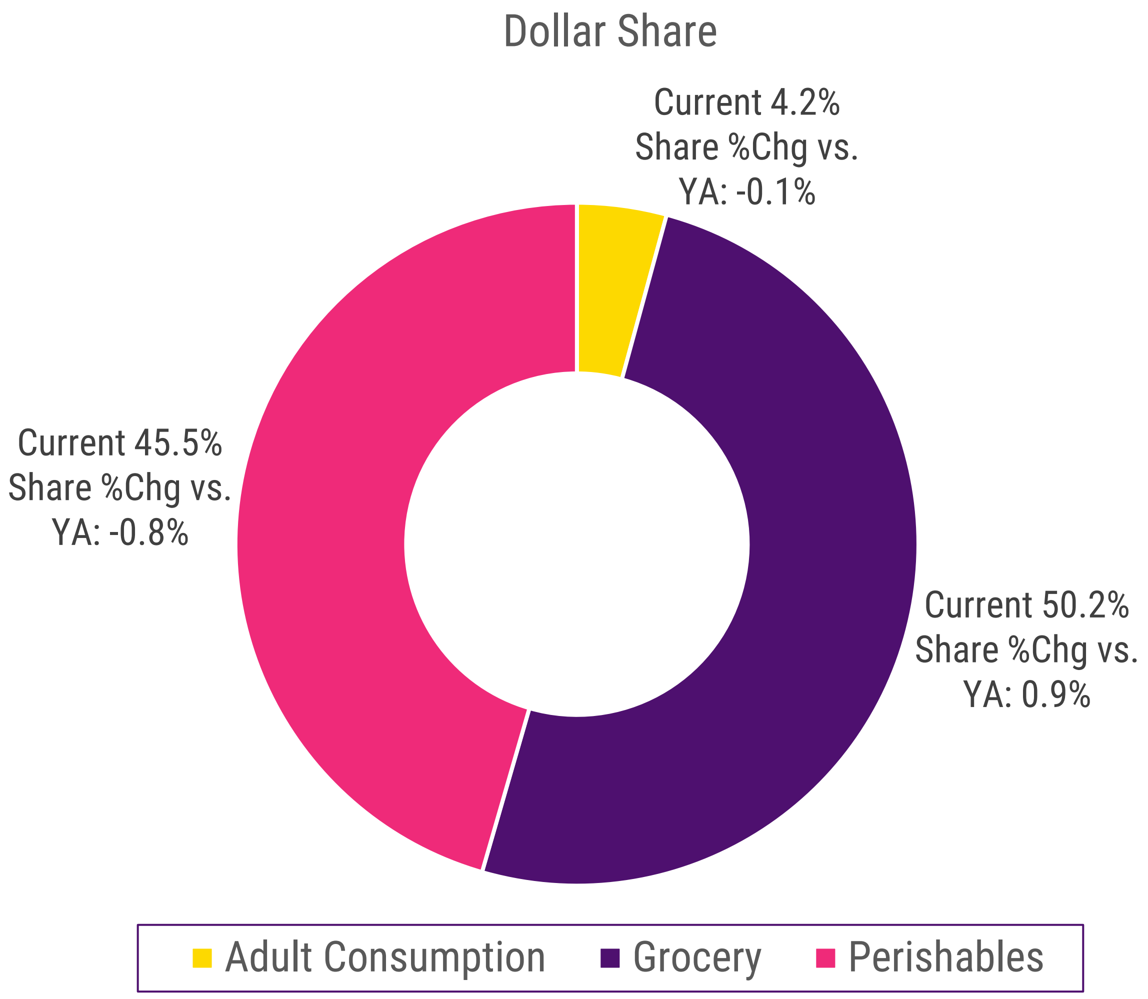
# Escape the Every Day

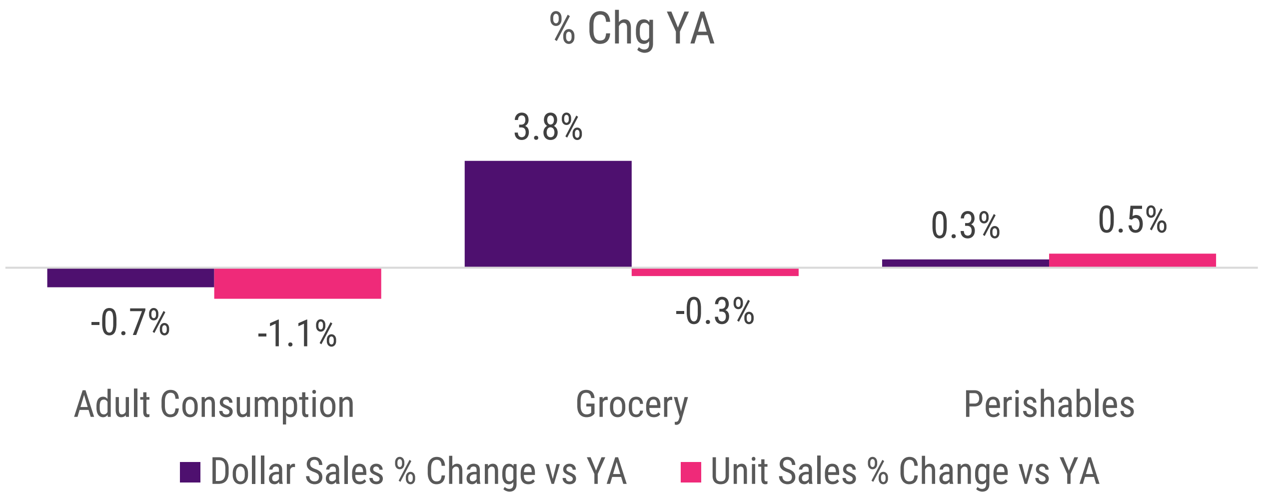


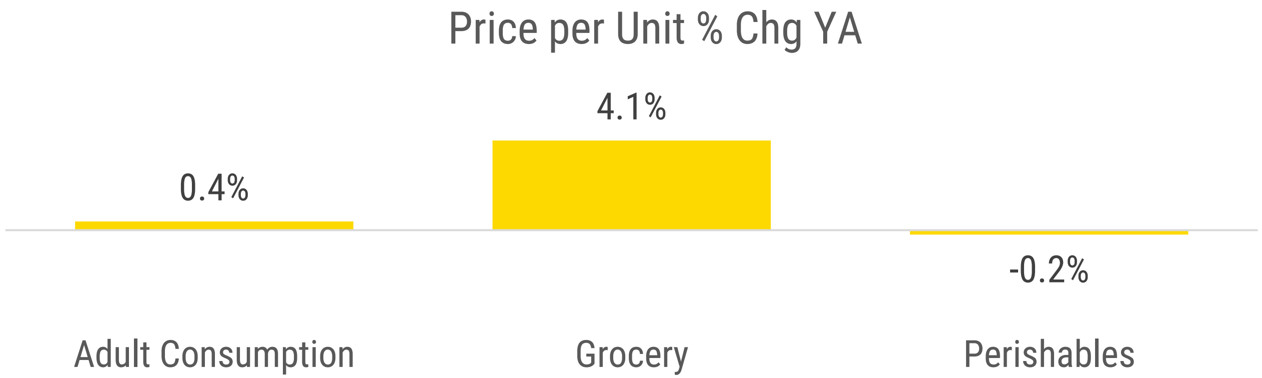
# Spending with Purpose

Sustained inflation is prompting consumers to balance value-seeking behaviors with selective splurges, creating a bifurcated marketplace that rewards both sharp value execution and well-timed premium offers.

# **Fresh is losing total food & beverage share to grocery** stronger sales increases are fueled by higher price per unit – Fresh sales & unit growth muted despite flat pricing



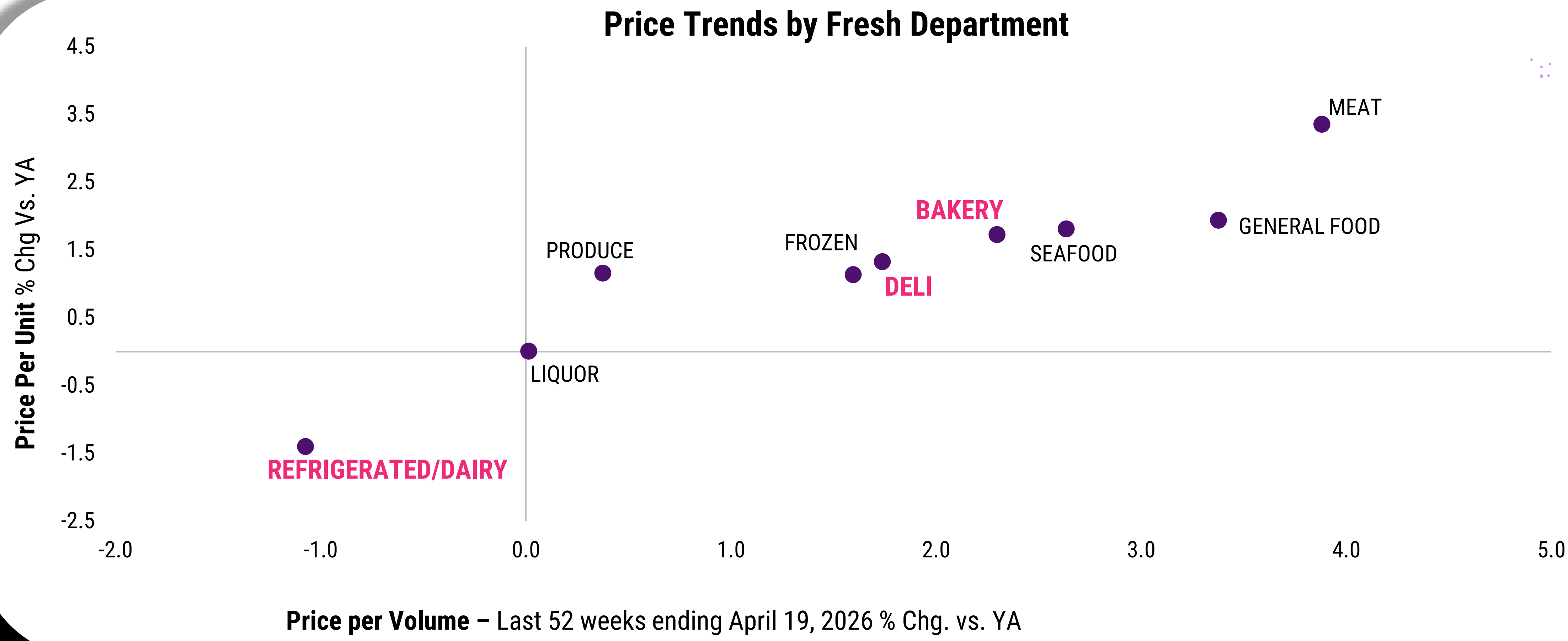

Source: Circana Integrated Fresh, Total US MULO+, Calendar Year to date 2026 Data Ending 04/26/2026





Units are shown versus volume as not all departments have the same equivalization across the store.

# Targeted Price Inflation Creates Opportunities to Rebalance Value and Promotion Across Fresh

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, *Source: Circana Integrated Fresh Market Advantage data ending 04-19-26, MULO+*

# All-time favorite meal reflects cuisine shakeup

## Move to more global cuisines while comfort meals look different

### All-time favorite meal (size of font reflects frequency of mention)


The font size corresponds to the number of mentions

**Fun facts**

- No one **aged 60+** mentioned:
  - Pho
  - Ramen
  - Mac & cheese
- No one **under 25** mentioned:
  - Liver (and onions)
  - Meatloaf
  - Chicken and dumplings





# Dimensions of value: market beyond price

More than ever, driving demand must be multidimensional and anchored in consumer priorities.

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*Source: Circana & FMI Dimensions of Value.*

# Unique and trendy ingredients resonate with Gen Z

## Opportunity to leverage LTOs as a real-life focus group

### Choice of a free pretzel bite sample

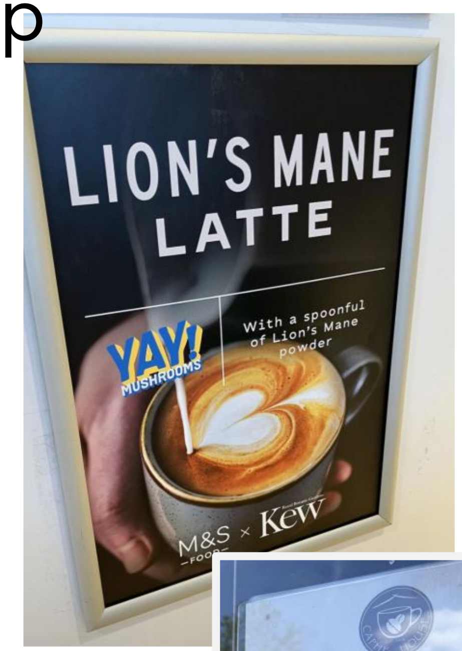
**Regular**

**72%**

**Spicy dill pickle**

**28%**

**39%** Gen Z
**35%** Millennials
**21%** Gen X
**17%** Boomers


# Seasonal and functional draw eyes

## Surprise and delight and nostalgia are strong mid-tier then

**Innovations prompting the most excitement for trial**

**34%** Seasonal items

**28%** Foods with functional benefits or better-for-you properties

**27%** Unexpected new flavor combos

**23%** Nostalgic or retro foods

**18%** Premium/indulgent foods

**15%** Global flavors/products

**15%** Store brand version

**14%** New textures (crunchy, layered, combinations, etc.)

**6%** None of these

**Top innovation for trial**

**Gen Z**
Unexpected combos
Functional benefits

**Millennials**
Seasonal items
Unexpected combos

**Gen X**
Functional benefits
Seasonal items

**Boomers**
Seasonal items
Functional benefits

# Purposeful Spending Fuels Craveable Escapes

As consumers balance value and indulgence, familiar favorites are being reinvented through seasonal offerings, functional benefits, and unexpected flavor mashups that drive discovery and trial.

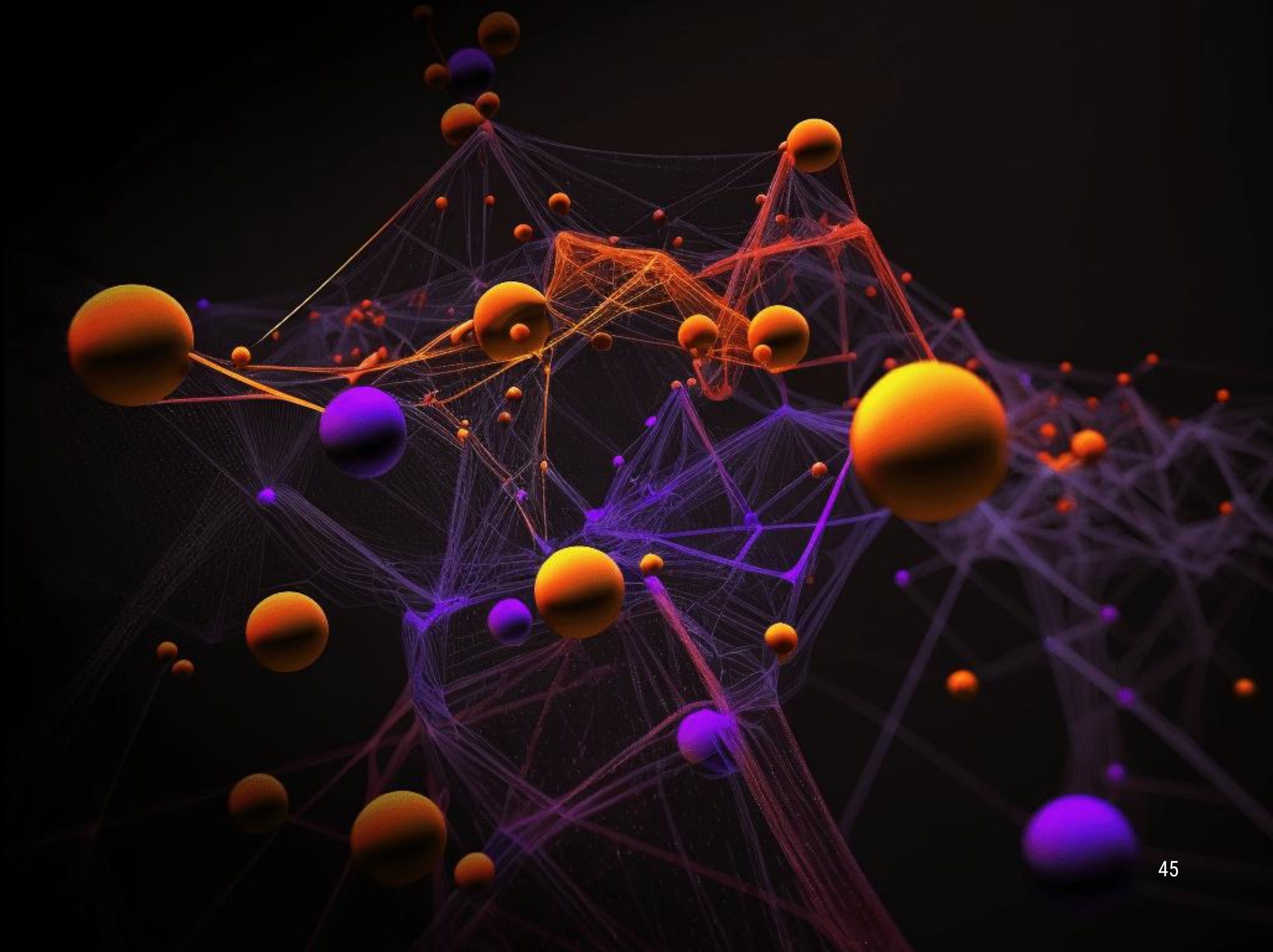



Nostalgic flavors in new products



Unexpected mashups

# Selling as a Need



## If something disrupts the “orbit” the solar system needs to take different actions:

### Essentials:

- Ubiquitous
- Frequent
- Versatile

---

### Solutions:

- Alternatives but laborious
- Periodic or occasion
- Need or situation-based

---

### Discretionary:

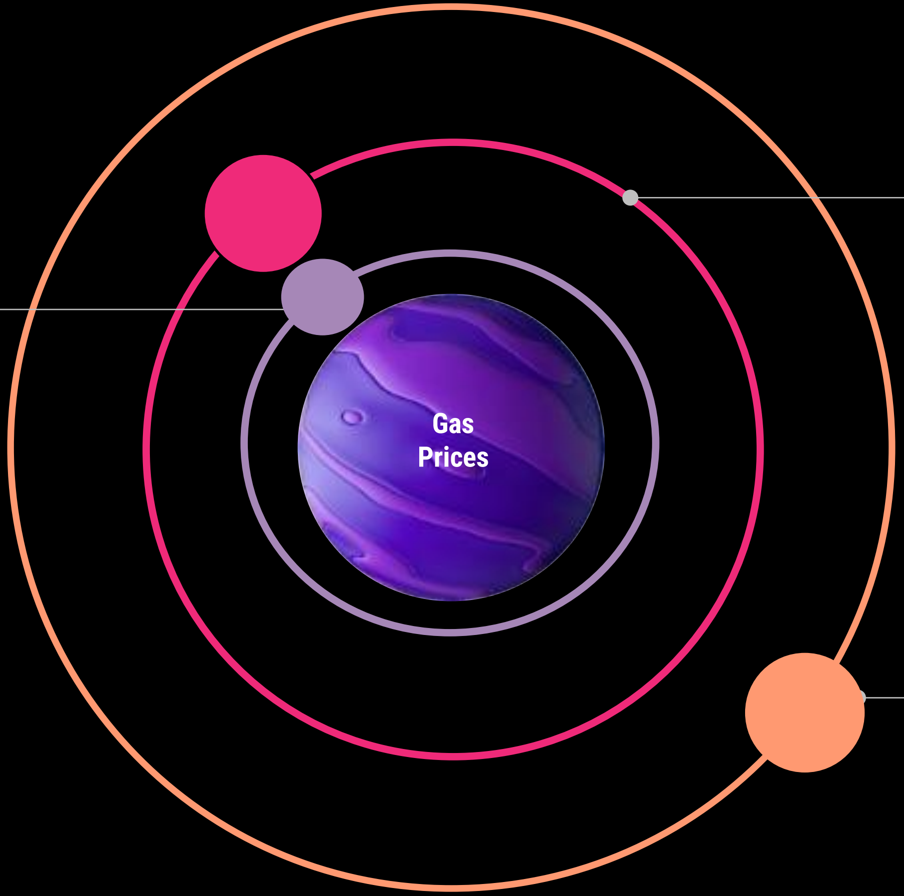
- Lower Buyer Base
- Unique Audience
- Differentiating

# Avg US HH Spend on Gas +$70/month vs last year

# Understanding gravitational pull unlocks new strategies anchored in consumer behavior

## Essentials

**Fresh Examples:**
Milk / Eggs / Butter
Cottage Cheese
Prepared Chicken
Lunchmeat




## Solutions

**Fresh Examples:**
Deli Prepared Sandwiches
Deli Salads
Specialty Cheese Chunks

## Discretionary

**Fresh Examples:**
Prepared Side Dishes
RFG Desserts
Fresh Bakery Cake Slices

Consumer's Spending is **Not Infinitely Expandable**

**Basket Size has Plateaued**

**Increasing costs of essentials** will ripple across all aisles

| REACH | FREQUENCY | OCCASION | AUDIENCE |
|---|---|---|---|

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# Help consumers with meal planning to be on the list

## Interest in steady meal days peaks among generations juggling kids and careers

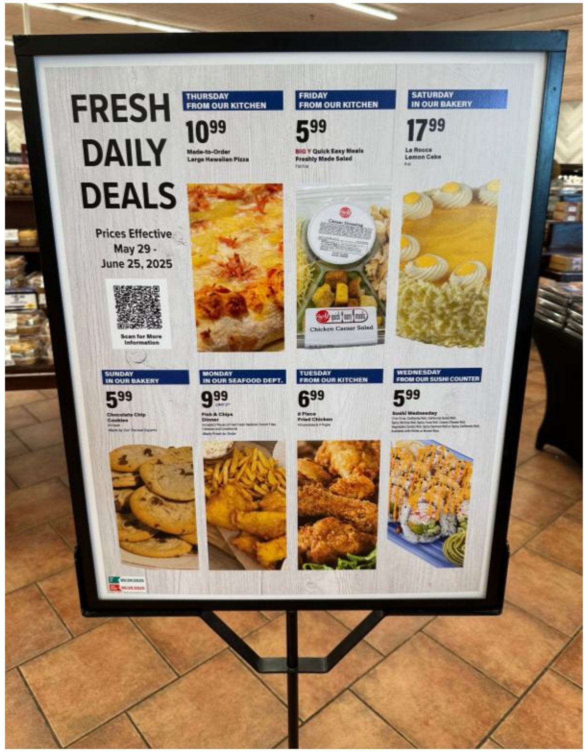
**Interest in steady deli food promotional days, such as pizza deals on Friday and sushi discounts on Wednesday**

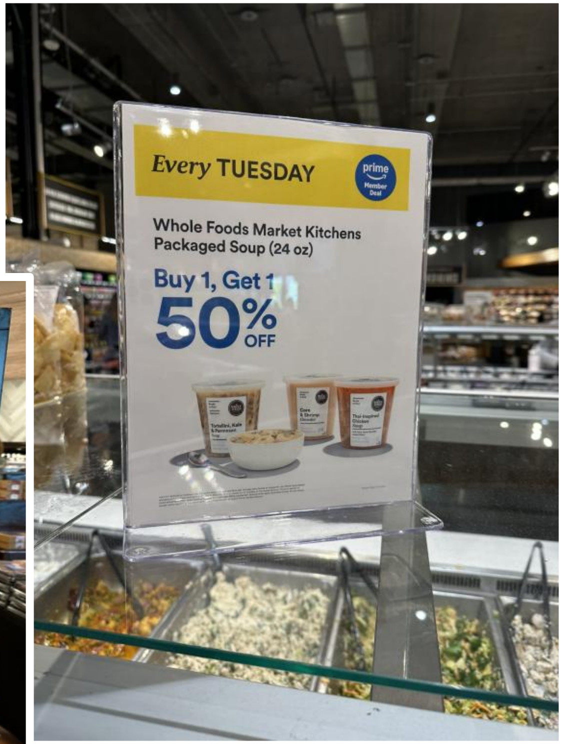
**45%**

Somewhat (23%) or very (22%) interested

**Interested by generation**

**44%** Gen Z
**53%** Millennials
**50%** Gen X
**35%** Boomers

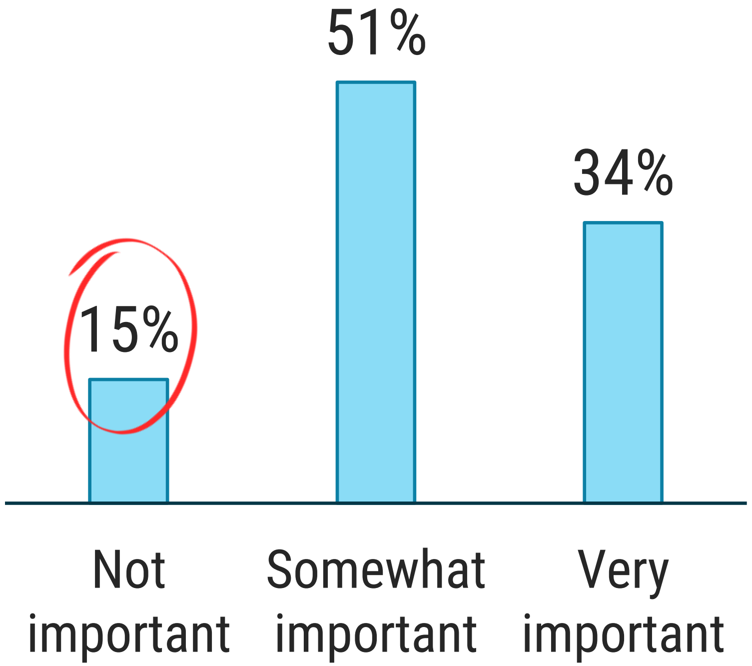


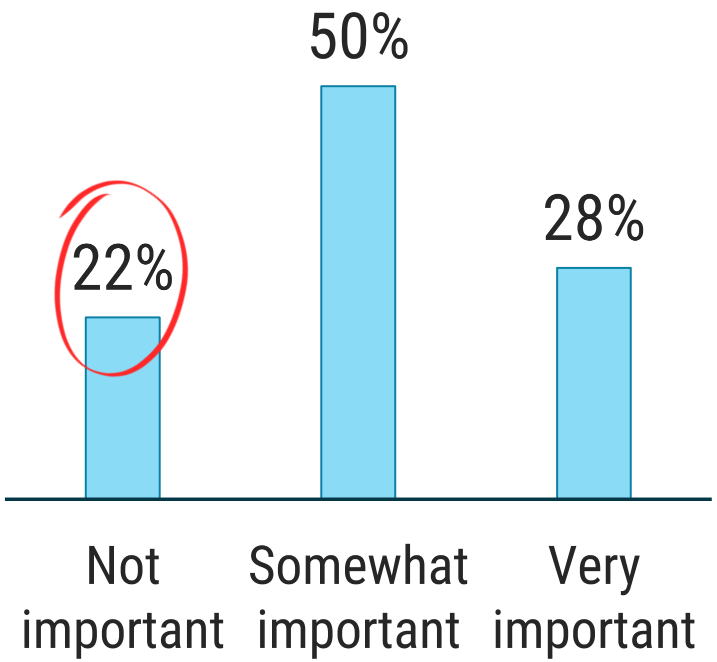
# Time is also a precious commodity
## The need for speed is driven by younger consumers

### Importance of time-saving shortcuts when preparing meals

**Weekday meals**




**Weekend meals**




**% very important (x%)**

| | Weekday | Weekend |
|---|---|---|
| Gen Z | 42% | 39% |
| Millennials | 42% | 34% |
| Gen X | 36% | 27% |
| Boomers | 22% | 18% |

| | Weekday | Weekend |
|---|---|---|
| Well-off | 43% | 41% |
| Struggling | 24% | 23% |

# Winning the Meal Starts with Solving the Need

As time becomes increasingly valuable, consumers are looking for meal solutions that simplify planning, speed up decision-making, and deliver the right format, flavor, and portion for every occasion.


# Meal interest shows future opportunities for deli

## Different sizes, different formats, different cuisines

**Interest by grocery deli prepared option (% somewhat or very interested)**

| | 1-person ready-to-cook | Multi-person ready-to-cook | Hot food bar | Salad bar | Sushi |
|---|---|---|---|---|---|
| Total | 38% | 36% | 37% | 34% | 29% |
| Gen Z | 51% | 49% | 51% | 50% | 49% |
| Millennials | 47% | 47% | 47% | 44% | 42% |
| Gen X | 31% | 34% | 38% | 34% | 30% |
| Boomers | 31% | 21% | 21% | 22% | 14% |


FEEL-GOOD SELECTIONS
SATISFYING SMALL BITES
BAKED, PRESS & WRAPPED
FLAVOR PACKED CLASSICS


FRUIT & PARFAITS
SANDWICHES, WRAPS & SUBS
MINI SANDWICHES & SNACKS
SALADS TO GO

HEADLINE SUMMARY

# Metrics That Matter for Future Dairy, Deli & Bakery Growth

## Centering on the Consumer :
## Can you answer these questions about your product or store?

### Retail Food & Bev
### Engagement

Is my growth coming from:

**More Buyers?**

**More Trips?**

**More Spend?**

Drivers Unlock Opportunity

### Foodservice
### Conversion & Capture

What value does this provide to the store?

**Store Shopper to Product Buyer Conversion**

**Share of Buyers' Wallet**

**B&M vs eComm**

Solutions, not Silos, deepen share

### General Merchandise
### Purchase to Consumption

How is this used after its bought?

Track **purchase and consumption habits** from the same consumers for holistic, end-to-end consumer insights

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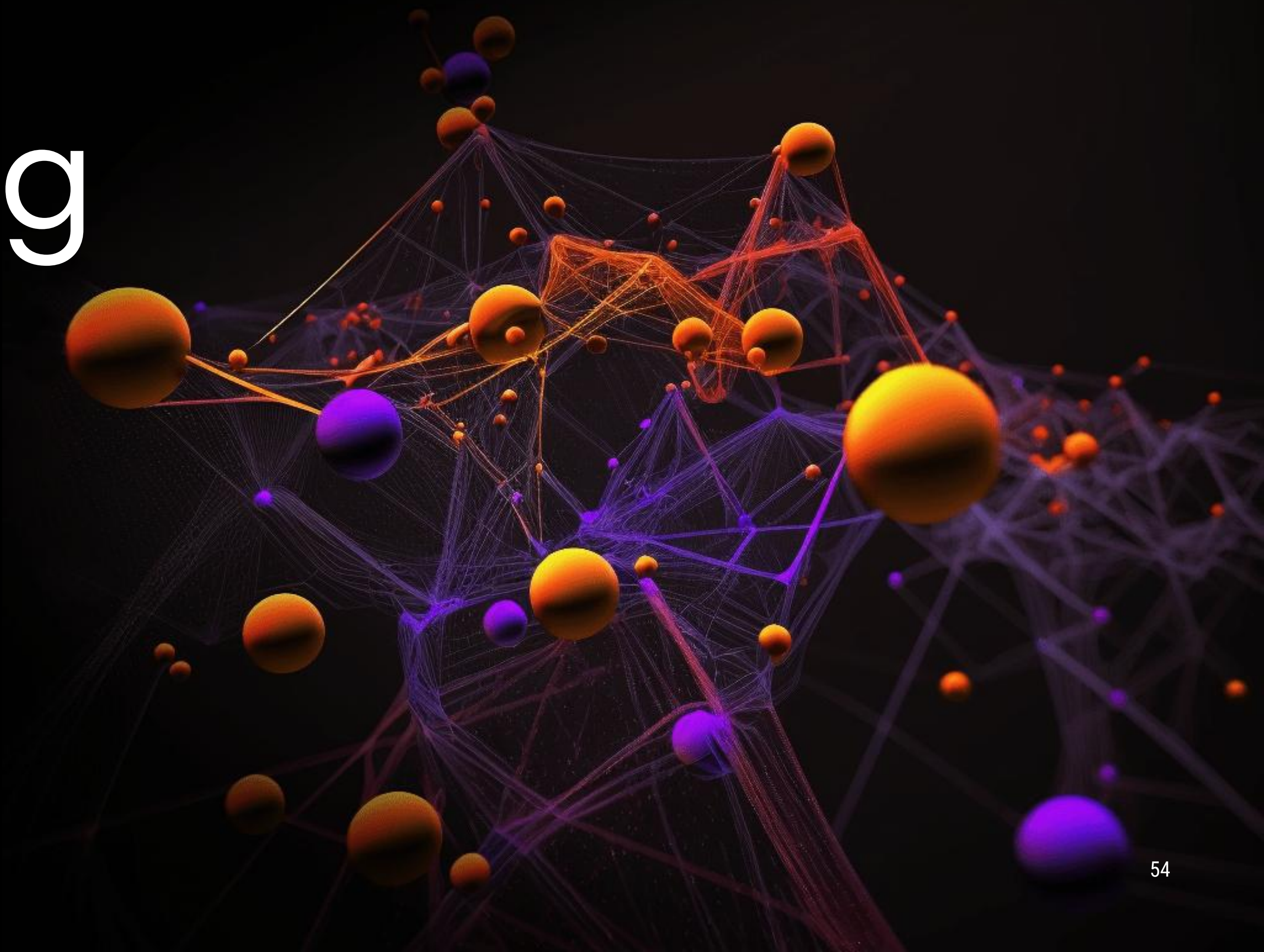
# Cart Stopping Shopping



# Younger consumers love exploring new cuisines
## They also want to see innovations more frequently

**59%**

of consumers **love** exploring new foods and cuisines

**66%** Gen Z
**68%** Millennials
**58%** Gen Z
**46%** Boomers

**64%** Financially well-off
**49%** Financially pressured


Picture: 210 Analytics

**Frequency of wanting to see new items and flavors in bakery/deli**

**19%** Never, I buy what I buy
**29%** Seasonally
**28%** Monthly
**18%** Weekly
**6%** Daily

**Top desired frequency:**
- Gen Z: Monthly
- Millennials: Monthly
- Gen X: Seasonally
- Boomers: Seasonally

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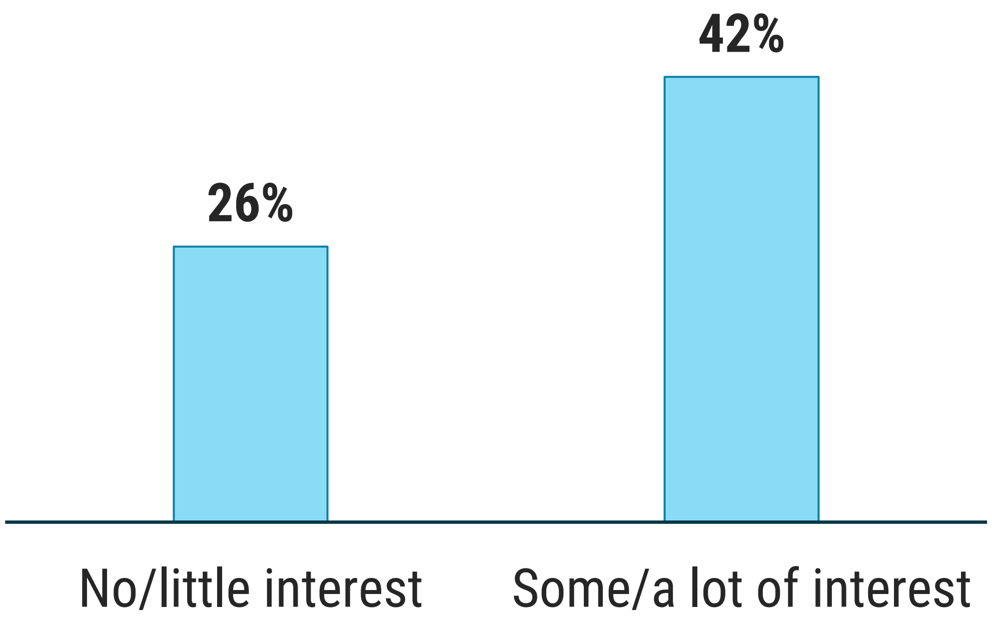
**Millennials**
Seasonal items
Unexpected combos

**Gen X**
Functional benefits
Seasonal items

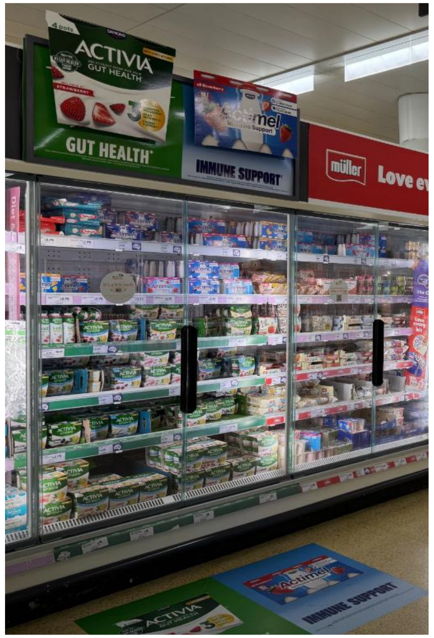
**Boomers**
Seasonal items
Functional benefits

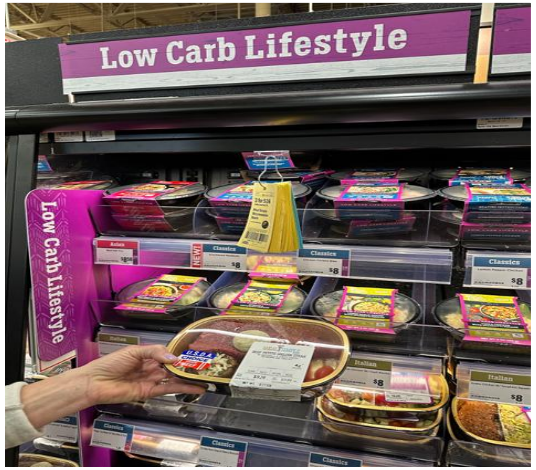
# Opportunity in lifestyle stations
## Lifestyle sets can lead to experimentation

**Interest in special sections that group items by diet, lifestyle or health goal, such as high-protein, low carb, gut health or immunity support**









Pictures: 210 Analytics

# Turning Quick Trips into Memorable Moments

As shopping trips become more frequent and less productive, retailers can win attention through discovery, inspiration, and immersive experiences that encourage consumers to stop, explore, and add more to basket.

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Taste the Discovery
SHAPES THAT SELL


Charcuterie


Healthy(ish) Indulgence
BORING BREAKFAST IS
CANCELED


Lighten the Load
PICK ME, I'M SINGLE


Makes me want a Hot Dog real bad

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**What Got Us Here Won't Get Us There –**

**Centering on the Consumer Key to Future Fresh Growth**



# Metrics That Matter

| | |
|---|---|
| **Components -> Solutions**<br>Prepared, ready-to-eat and right-sized offerings gaining vs "build it yourself" meal ingredients | **High Utility Foods Drive Trips**<br>Meat & produce staples plus snackable-fresh anchor frequency – but differentiation comes from convenience + variety |
| **Escape & Experience Still Matter – Even in This Economy**<br>Floral, treats and specialty cheese top affordable indulgences in fresh | **Channel Fragmentation Accelerating**<br>Growth sought well beyond traditional retail outlets – winning requires relevance, experience & targeted solutions |

*Source: Circana Fresh Perspectives Q2 2026*

# Thank you

Join us for another Deep Dive!

[Link to Register]

Interested in insights from this session?

CLICK HERE or

*Including a discount for IDDBA members*

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