

Fresh Factor

What's popping in produce & protein



NielsenIQ  **DATASSENTIAL**

Meet your speakers



Sherry Frey

VP, Total Wellness

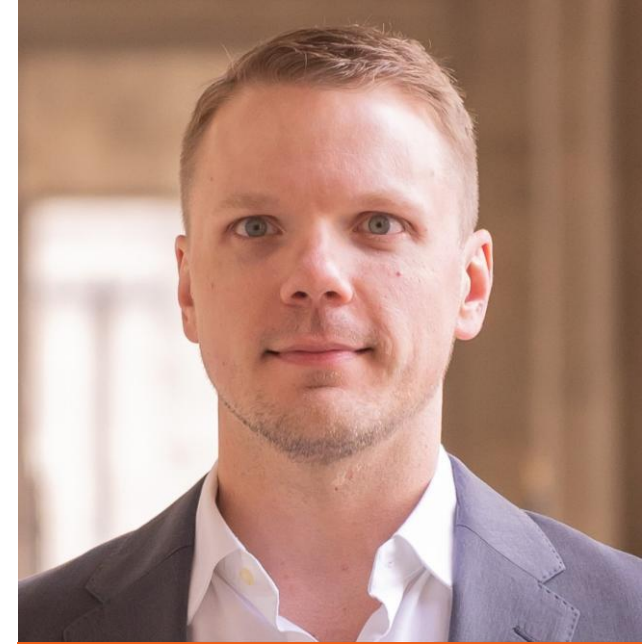
NielsenIQ



Claire Conaghan

Trendologist

Datassential



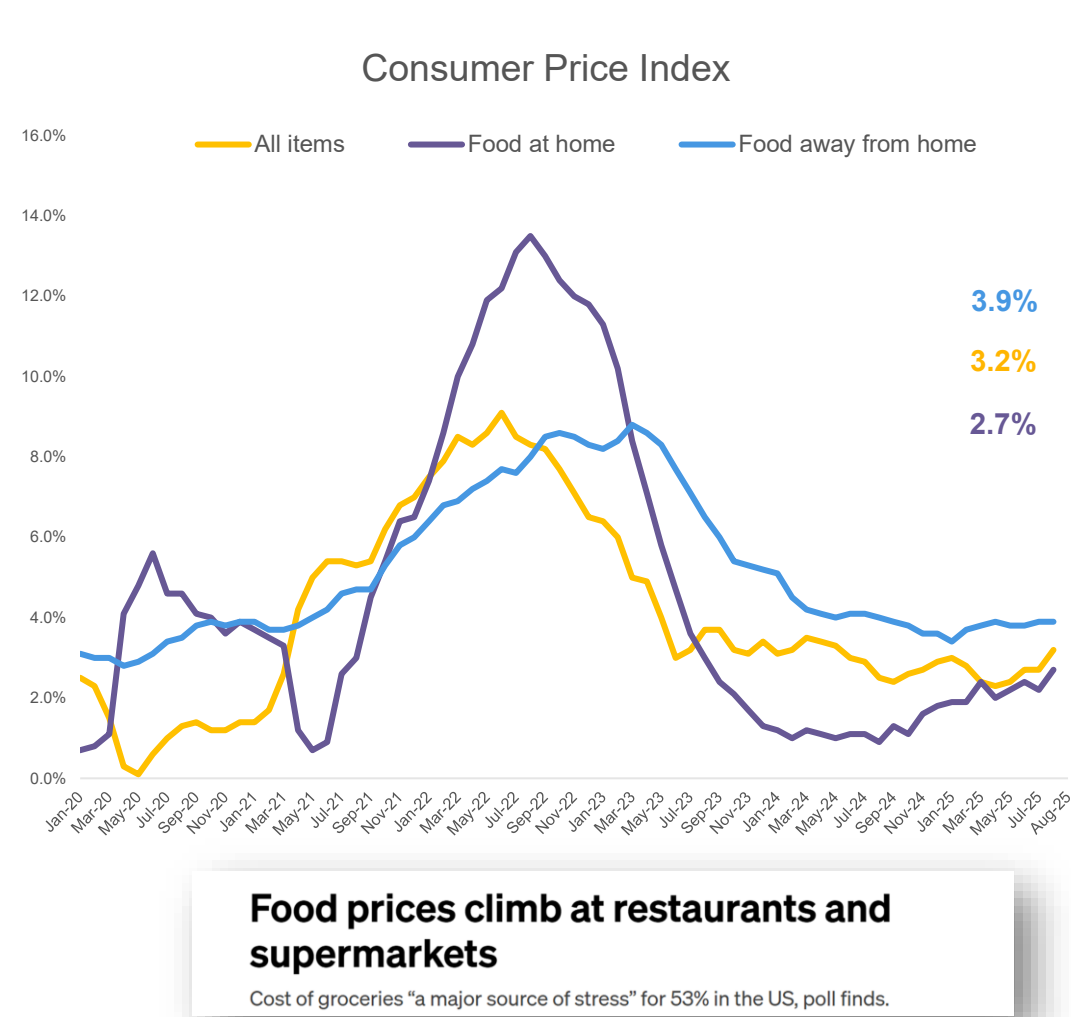
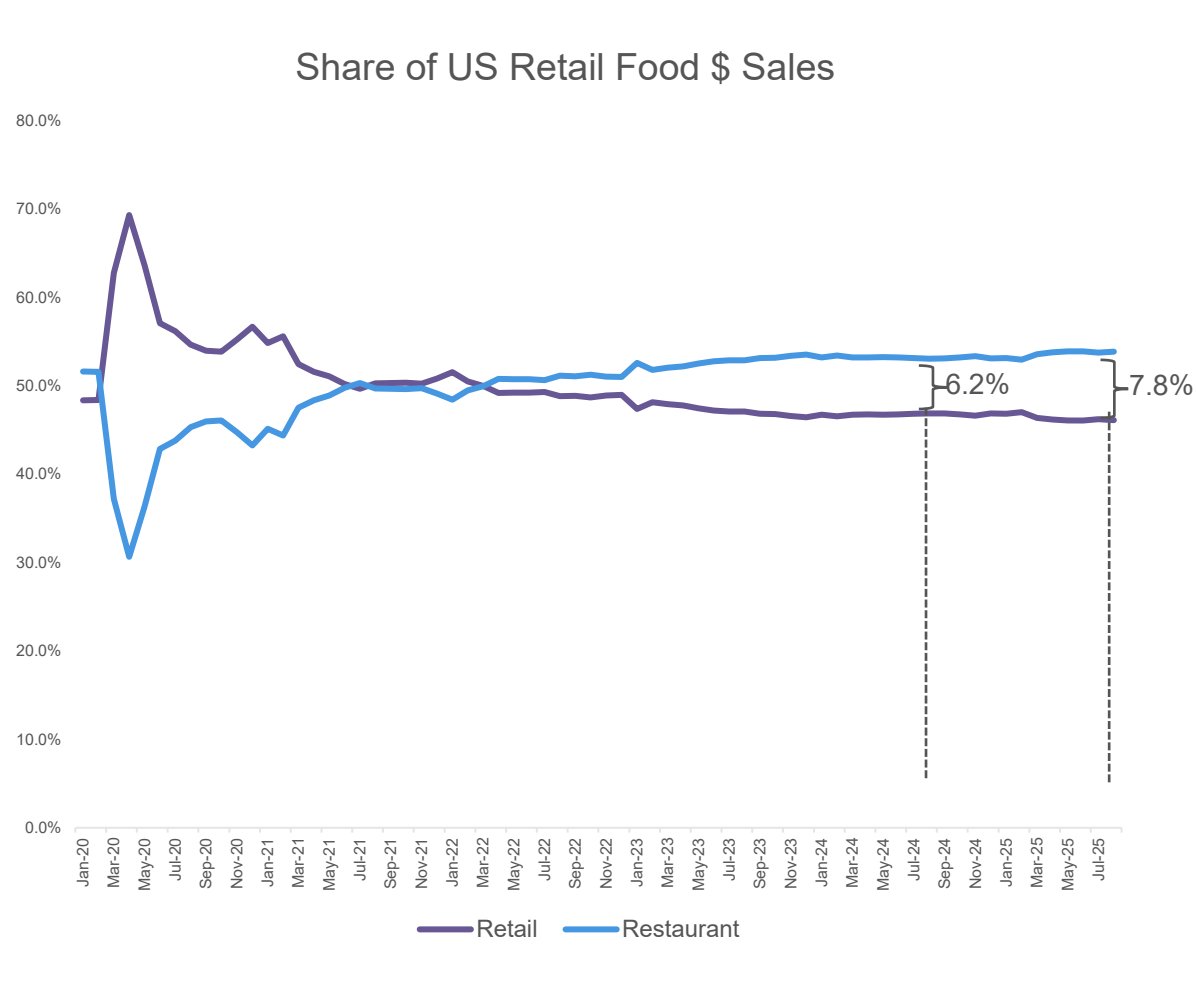
Chris Costagli

VP, Food & Beverage

NielsenIQ

The food at home versus away from home dynamic continues to shift

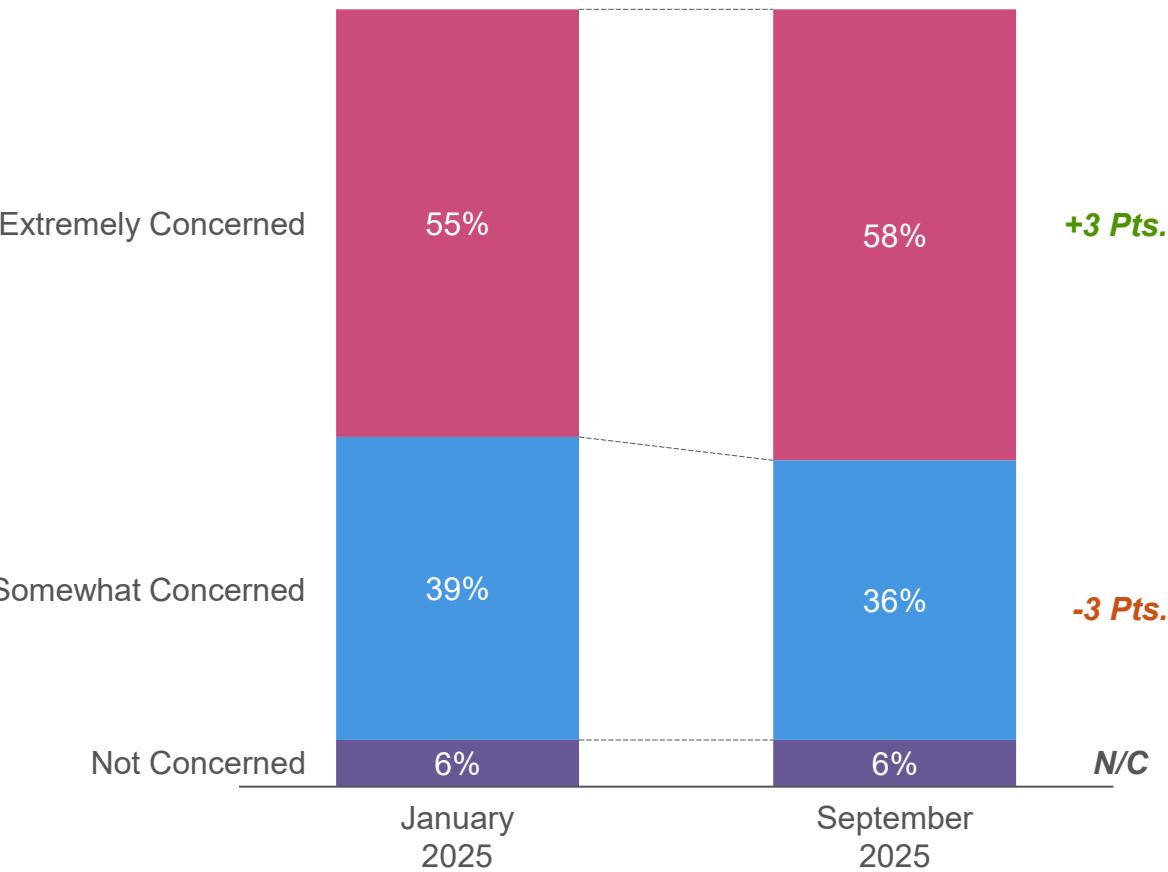
Retail–Restaurant gap widens amid rising restaurant prices



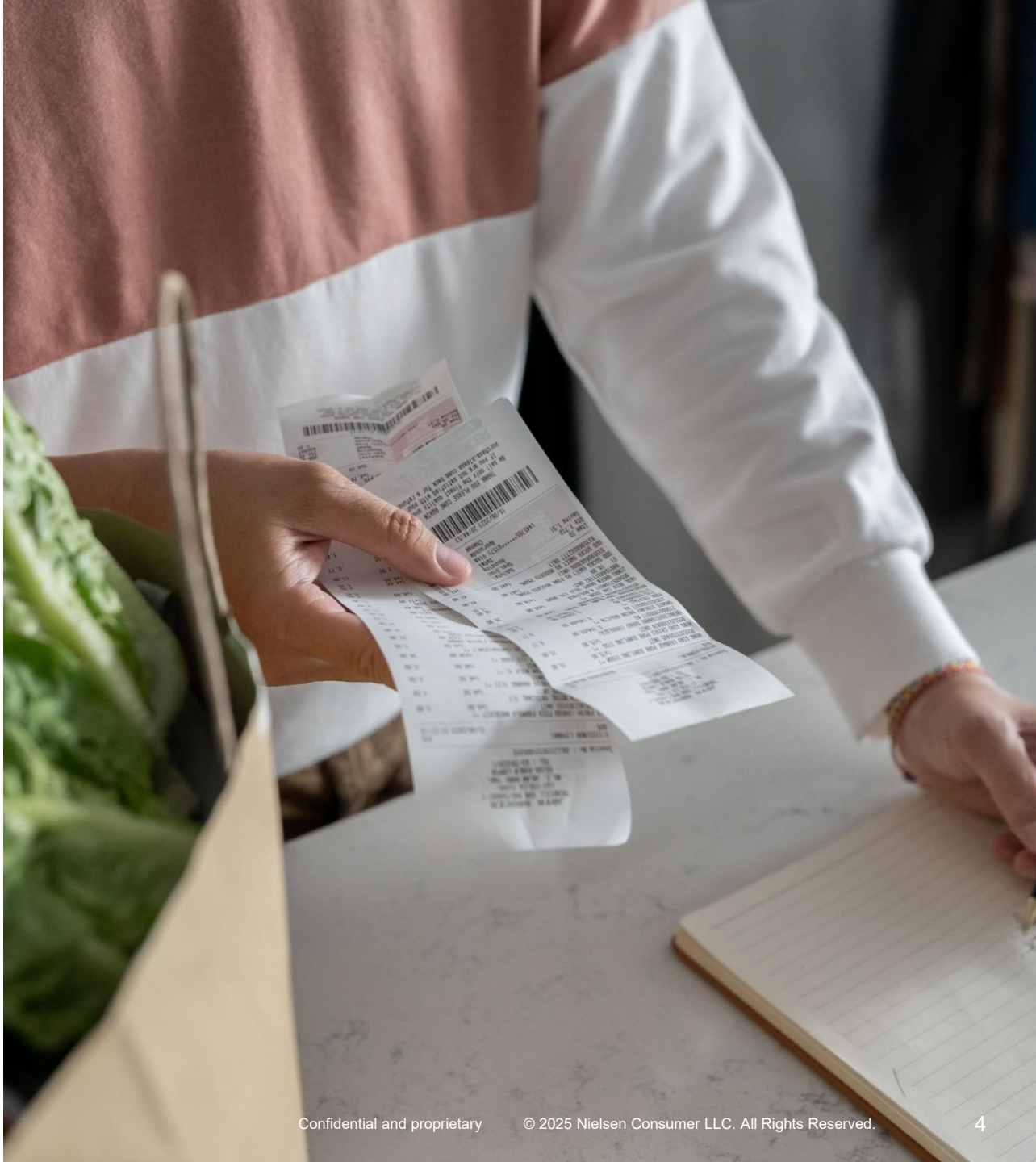
Sources: US Census Bureau - Food & Beverage Stores + Food Service & Drinking Places | Slide updated in September 2025 (data updated monthly, through August 2025)

Shopper worries are growing

Concern Over Food Cost Inflation



Source: NIQ, BASES Quick Question Omnibus Survey, January 2025 n=1,001 Vs. September 2025, n=1,006



Personal finance concerns continue to top the list for consumers while global matters shift

Top concerns among U.S. consumers

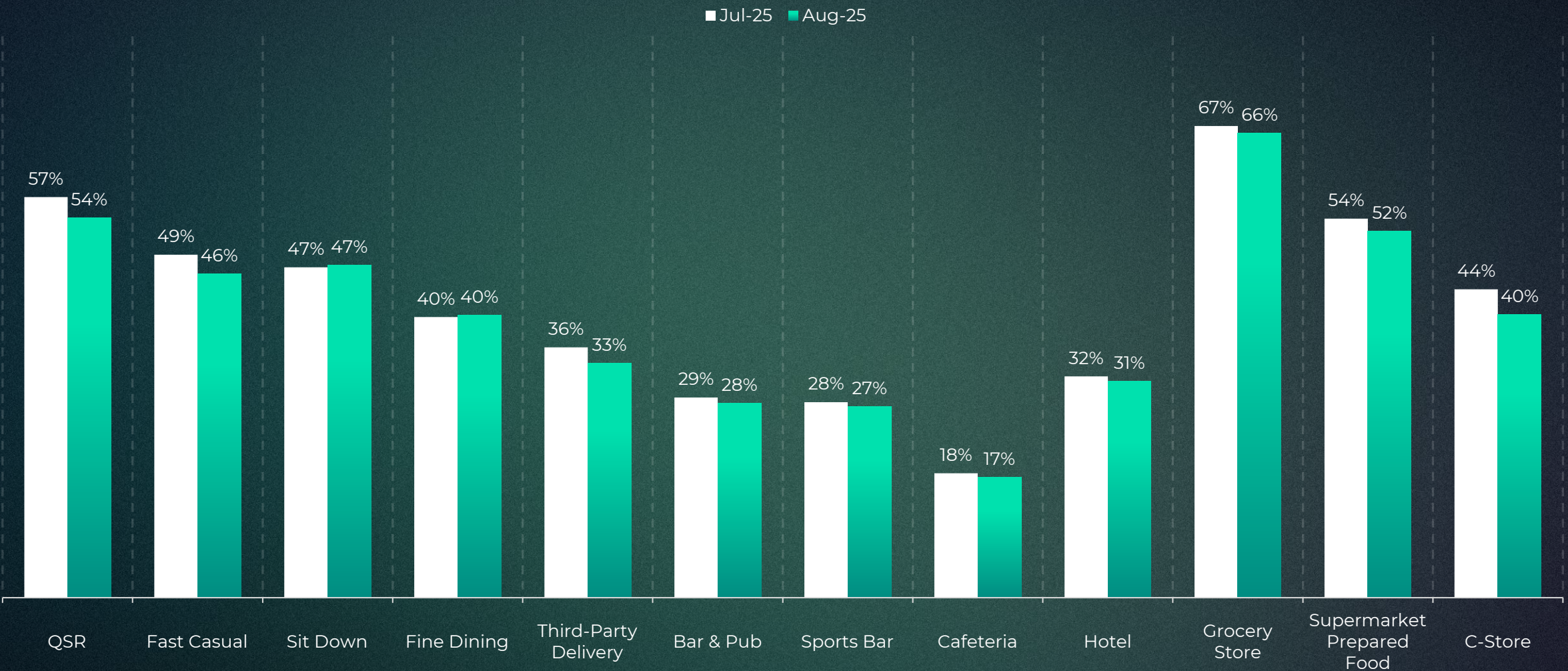


Source: NIQ 2024 Consumer Outlook vs Mid-Year 2023 , 2024, 2025 Survey, US Market

Consumer Inflation Perception

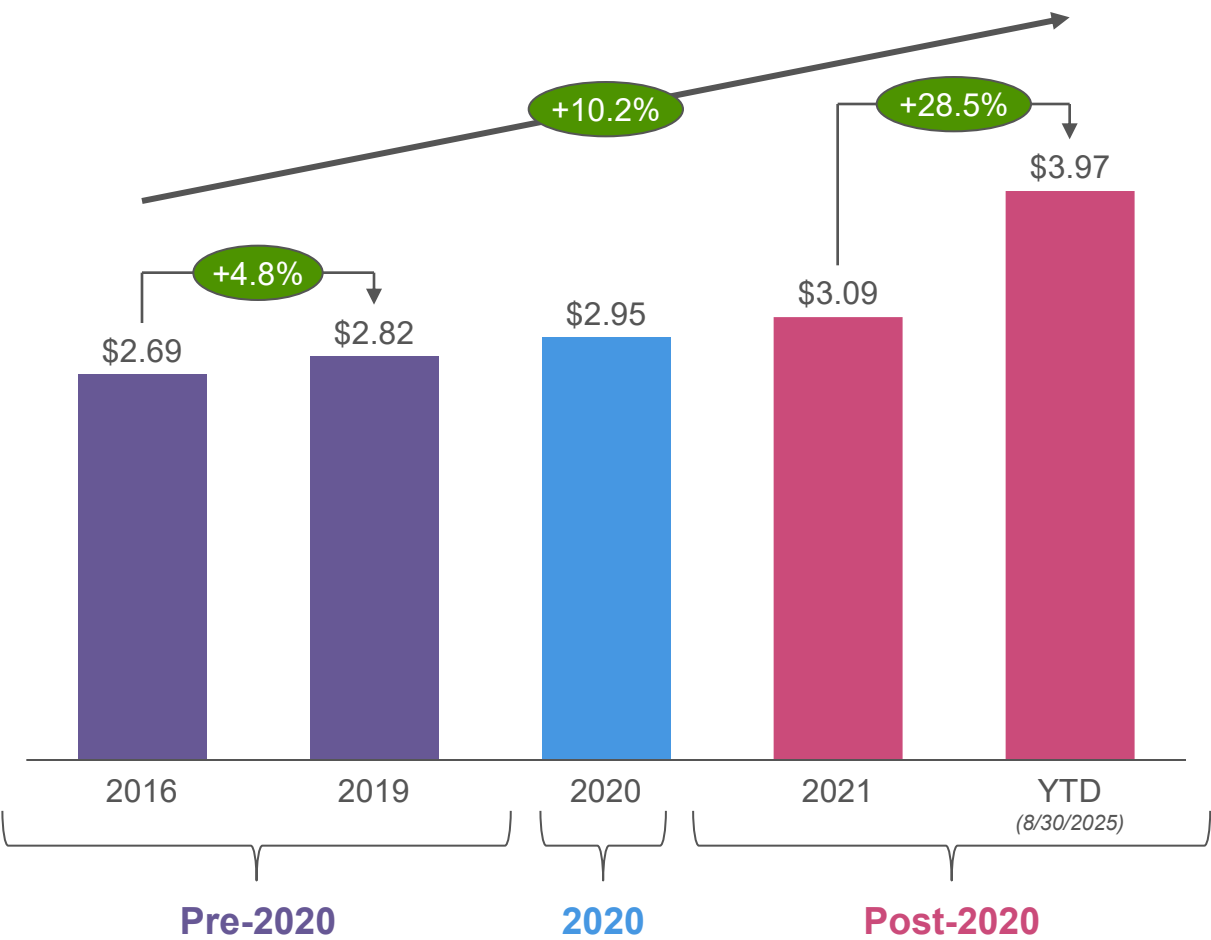
09/25

HOW MANY CONSUMERS ARE NOTICING PRICE INCREASES AT THE FOLLOWING VENUES?



Sticker shock is the new shelf reality

Food & Beverage Base Unit Price



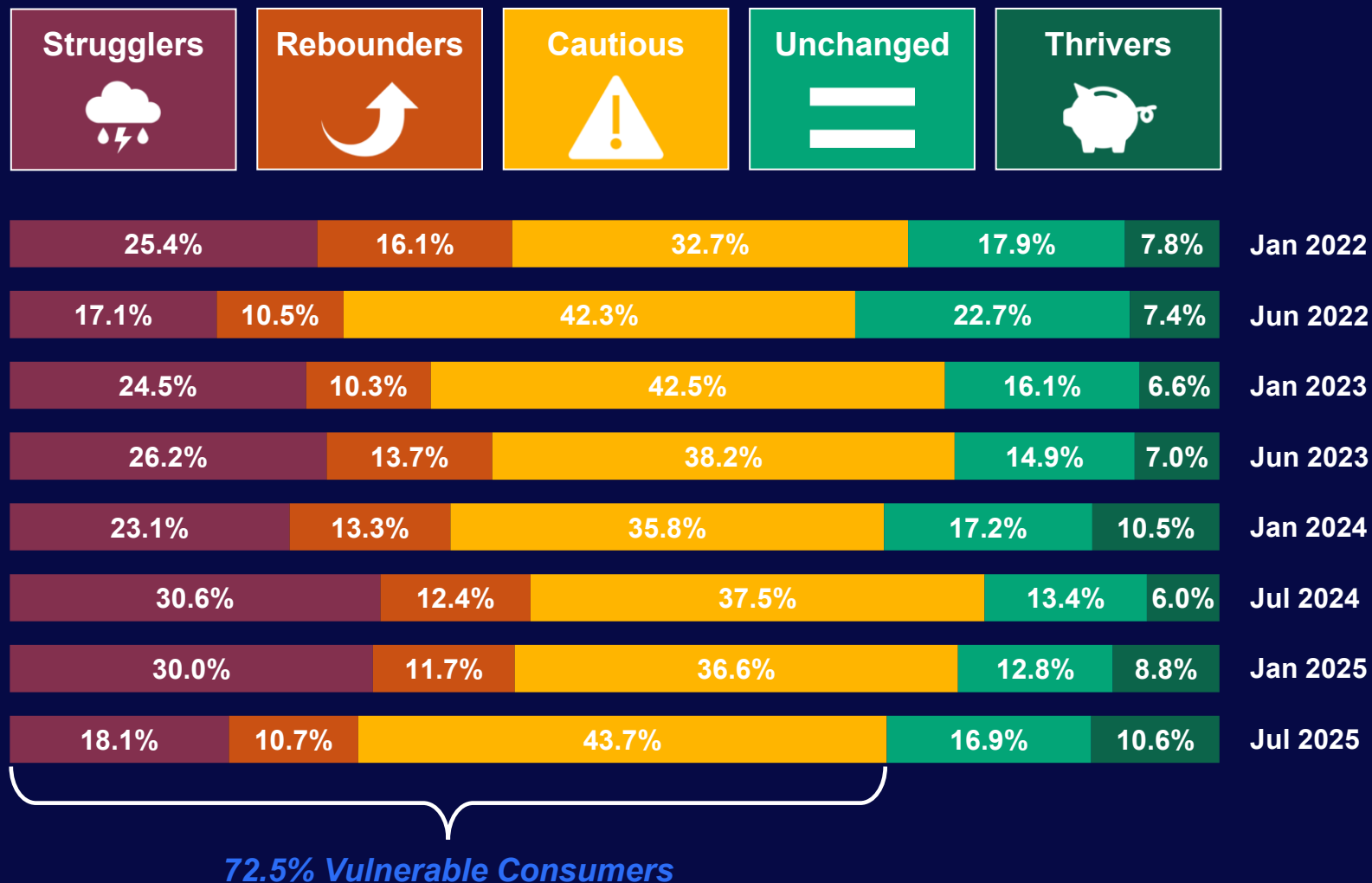
Source: NIQ, Retail Measurement Services, 10-Year Database, Total US xAOC + Conv., Total Food & Beverage w/Fresh





Financial concerns shifting

The Economic Divide – Tracking financial situations and responses

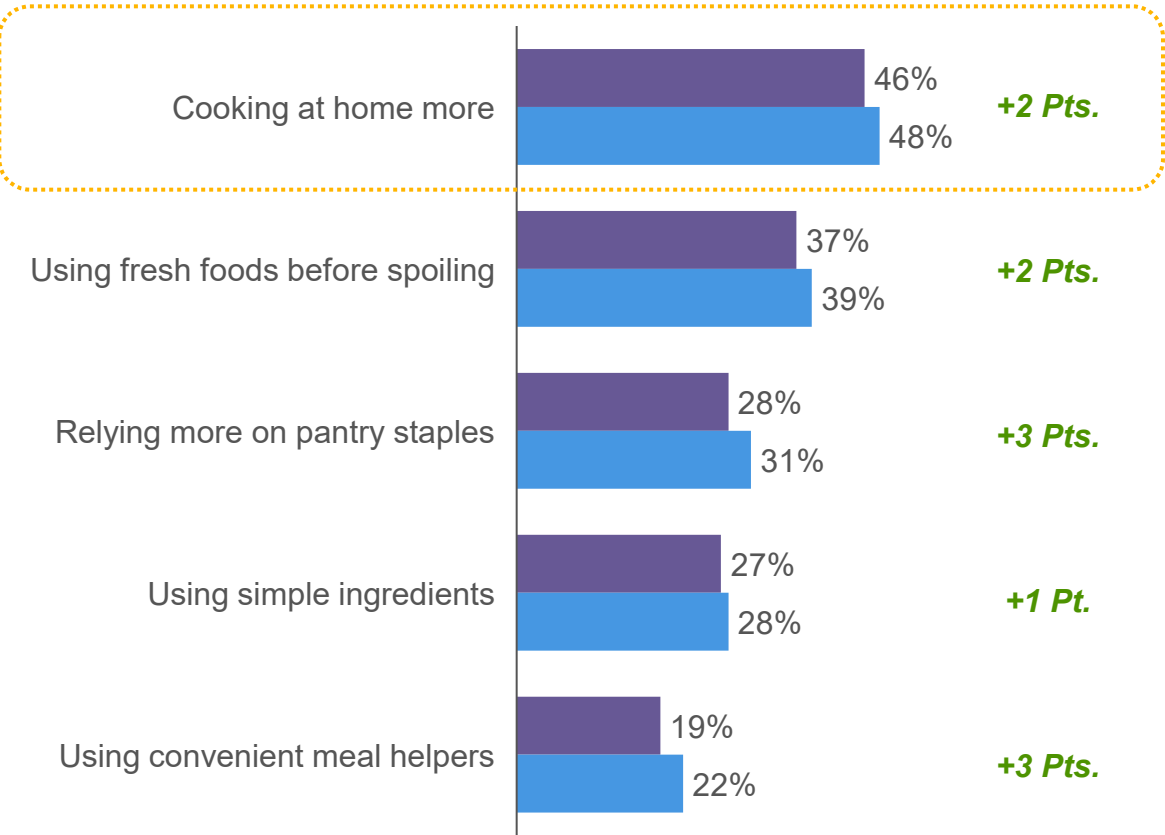


Source: NIQ Consumer Outlook Report, Jan 2022 to Jul 2025, US Market

As a result, mealtime looks different

Inflation Impact on Meal Preparation

January September



Source: NIQ, BASES Quick Question Omnibus Survey, January 2025 n=1,001 Vs. September 2025, n=1,006



Consumer Saving Strategies

09/25

STRATEGIES CONSUMERS WILL ADOPT TO SAVE MONEY AT RESTAURANTS

	JUL '25	AUG '25	1-mo. change
Order fewer or no beverages with my meal	29%	26%	-3%
Order cheaper menu items than usual	27%	25%	-1%
Choose more affordable venues than usual	26%	25%	0%
Order fewer or no add-ons (appetizers, sides, etc.)	24%	22%	-2%
Look for restaurant coupons that come in the mail	23%	22%	-1%
Look for deals on restaurant apps or delivery apps	24%	20%	-4%
Join restaurant loyalty clubs	18%	18%	0%
Stretch a combo or meal deal by saving an item for later	21%	18%	-3%
Look for restaurant “menu hacks” on social media	12%	13%	0%
Make a meal only of add-ons but skip the entrée	9%	11%	1%
Feed a group by splitting add-ons & buying separate entrees	11%	10%	-1%
None of the above	29%	31%	3%

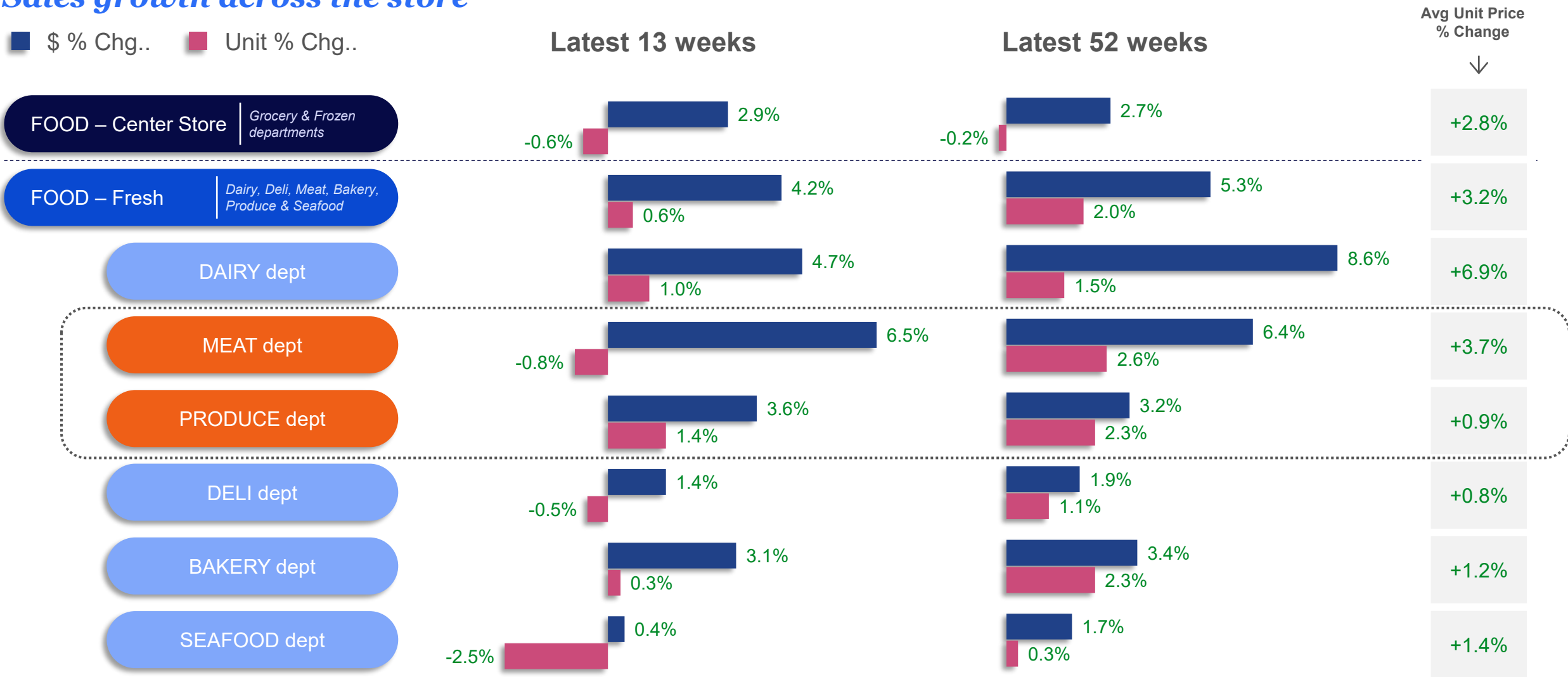
STRATEGIES CONSUMERS WILL ADOPT TO SAVE MONEY AT GROCERY STORES

	JUL '25	AUG '25	1-mo. change
Buying store brands or private-label brands	45%	44%	-1%
Using coupons more often	41%	40%	-1%
Making at home what I would buy prepared or packaged	35%	34%	-1%
Shopping at multiple stores to find lowest prices	33%	33%	0%
Visiting lower-cost grocery stores	34%	33%	-2%
Buying ingredients in bulk to prep and freeze for later	27%	25%	-2%
Buying frozen produce instead of fresh produce	21%	20%	-2%
Substituting lower-price proteins	19%	18%	-1%
Switching from organic brands to regular brands	11%	12%	1%
None of the above	16%	18%	2%

Fresh growth is outpacing the rest of the store

Sales growth across the store

■ \$ % Chg.. ■ Unit % Chg..



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, Periods Ending 9/6/2025, Food & Beverage departments, Dollar, Unit, and Avg Unit Price % change vs year ago

Total Store & Fresh success go together

Best in Class Fresh Retailer Methodology

- Banners were segmented into quartiles based on Total Fresh \$/\$MM ACV
- “**Fresh**” Departments – Bakery, Dairy, Deli, Meat, Produce, Seafood; all fixed and random weight sales

Total Food Performance by Fresh Retailer Tier

% Food \$ Growth | % Fresh \$ Share of Total Food

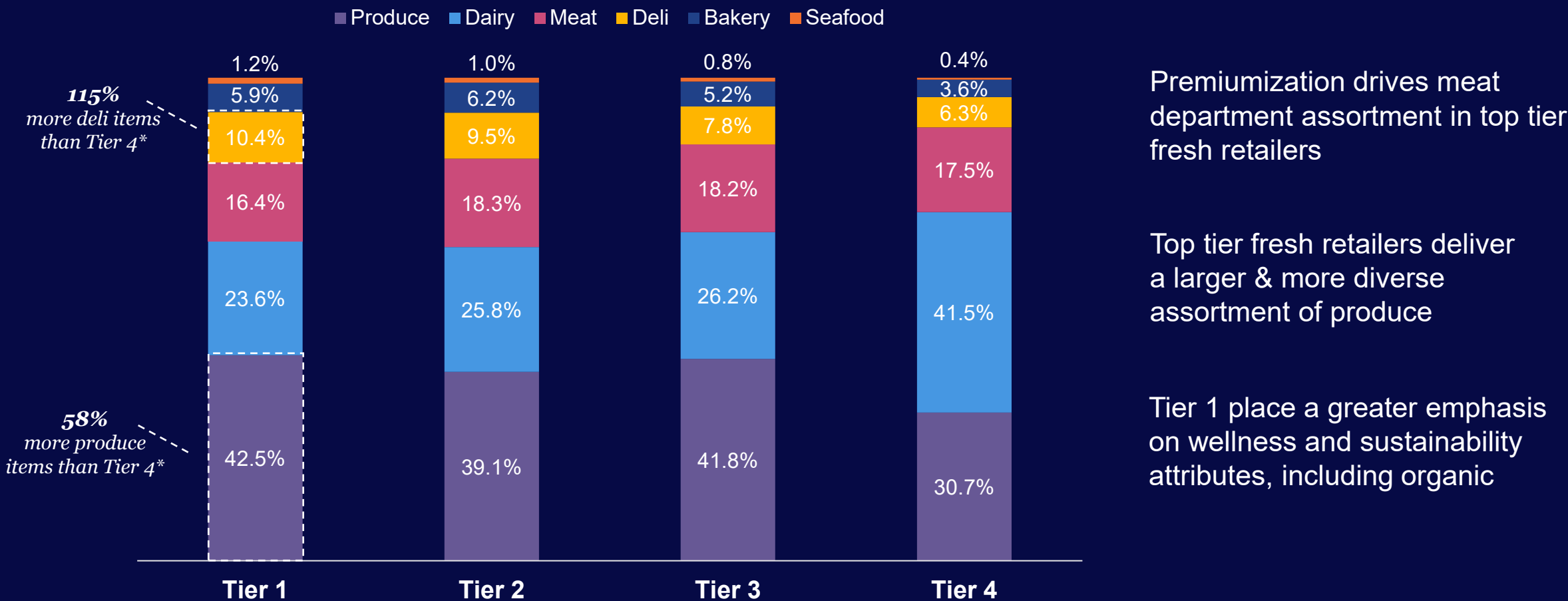


Source: NielsenIQ Retail Measurement; Total US xAOC; Total Food & Beverage; \$ share of Food & Beverage, \$ % change vs year ago; 52 weeks ending September 6, 2025

Top tier fresh retailers stand out through greater emphasis on produce and deli

Tier 1 have developed all Fresh departments, while lower tier rely on their dairy department

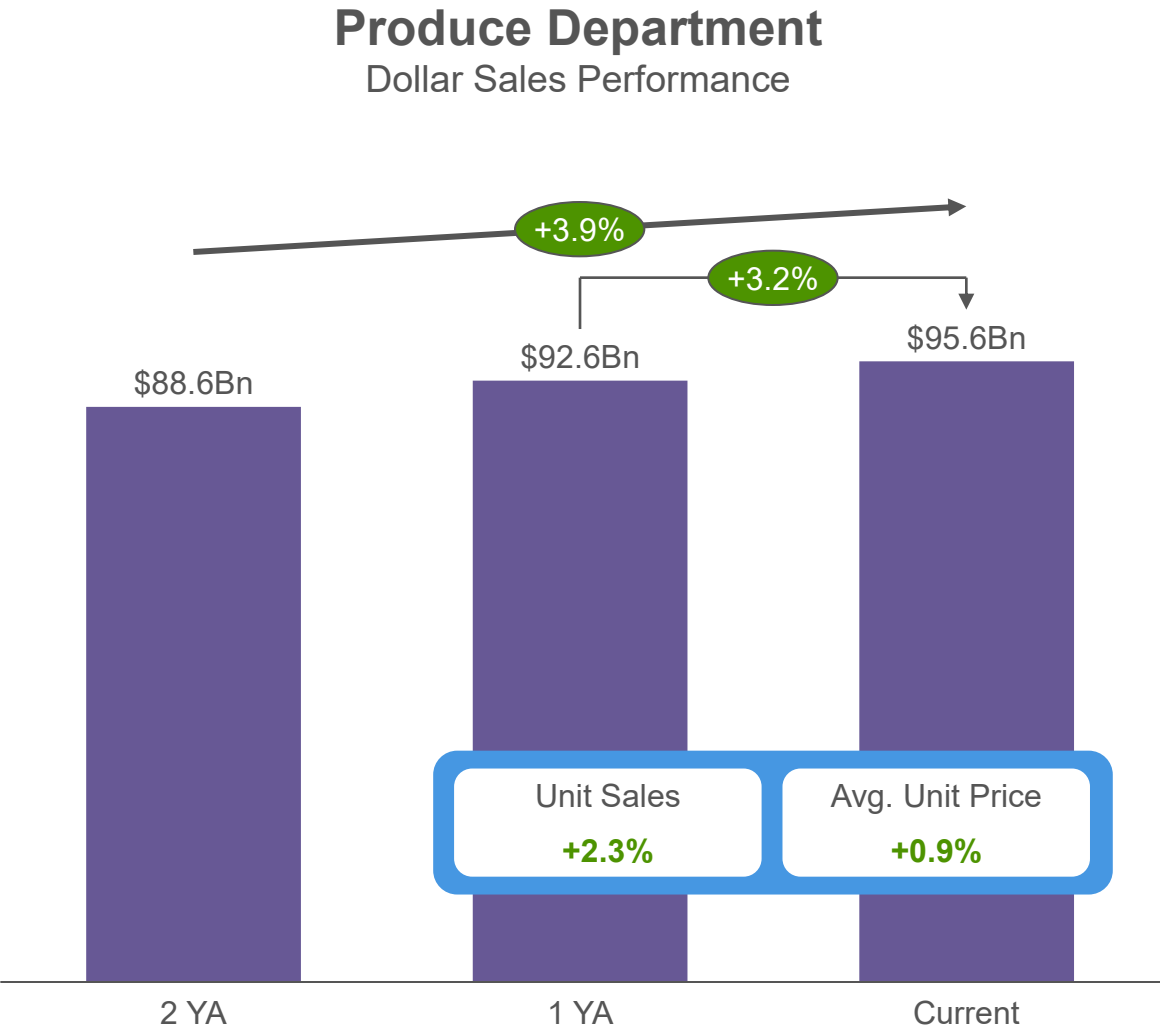
Unit Volume Share by Fresh Department¹



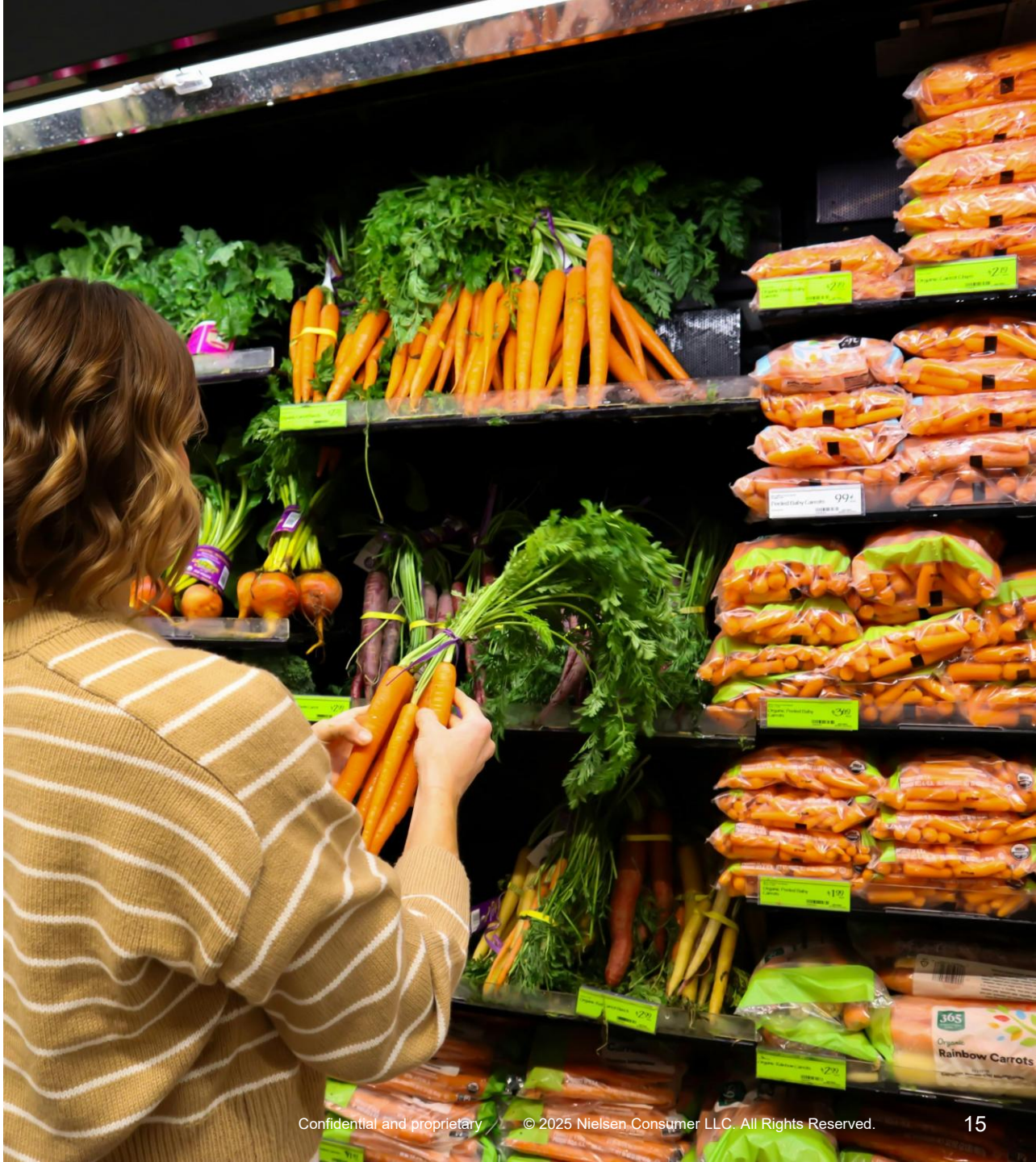
Source: NielsenIQ Retail Measurement; Total US xAOC; Fresh Departments: Bakery, Dairy, Deli, Meat, Produce, Seafood; *Average # of Items, ¹Units % share of Total Fresh; 52 weeks ending September 6, 2025

A look at the latest produce trends...

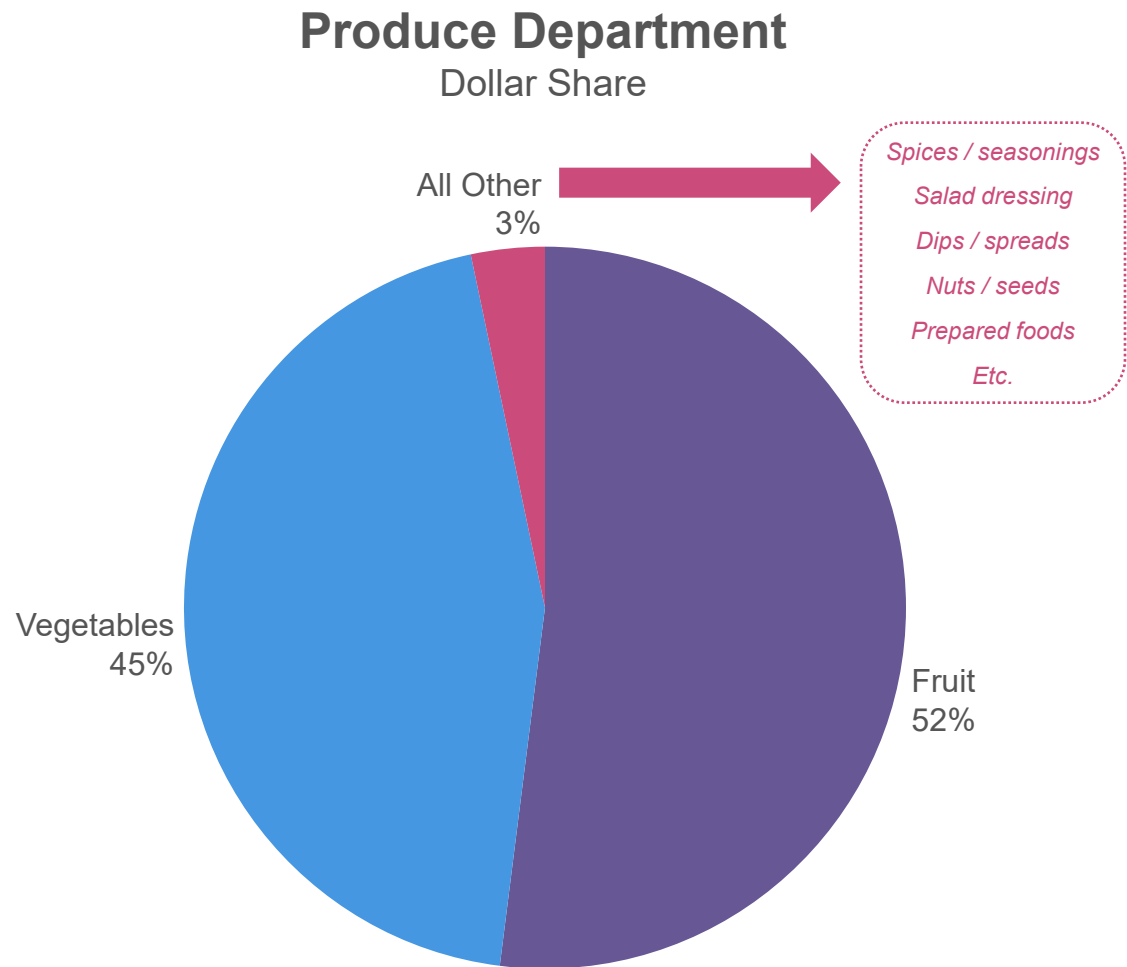
Produce is trending up



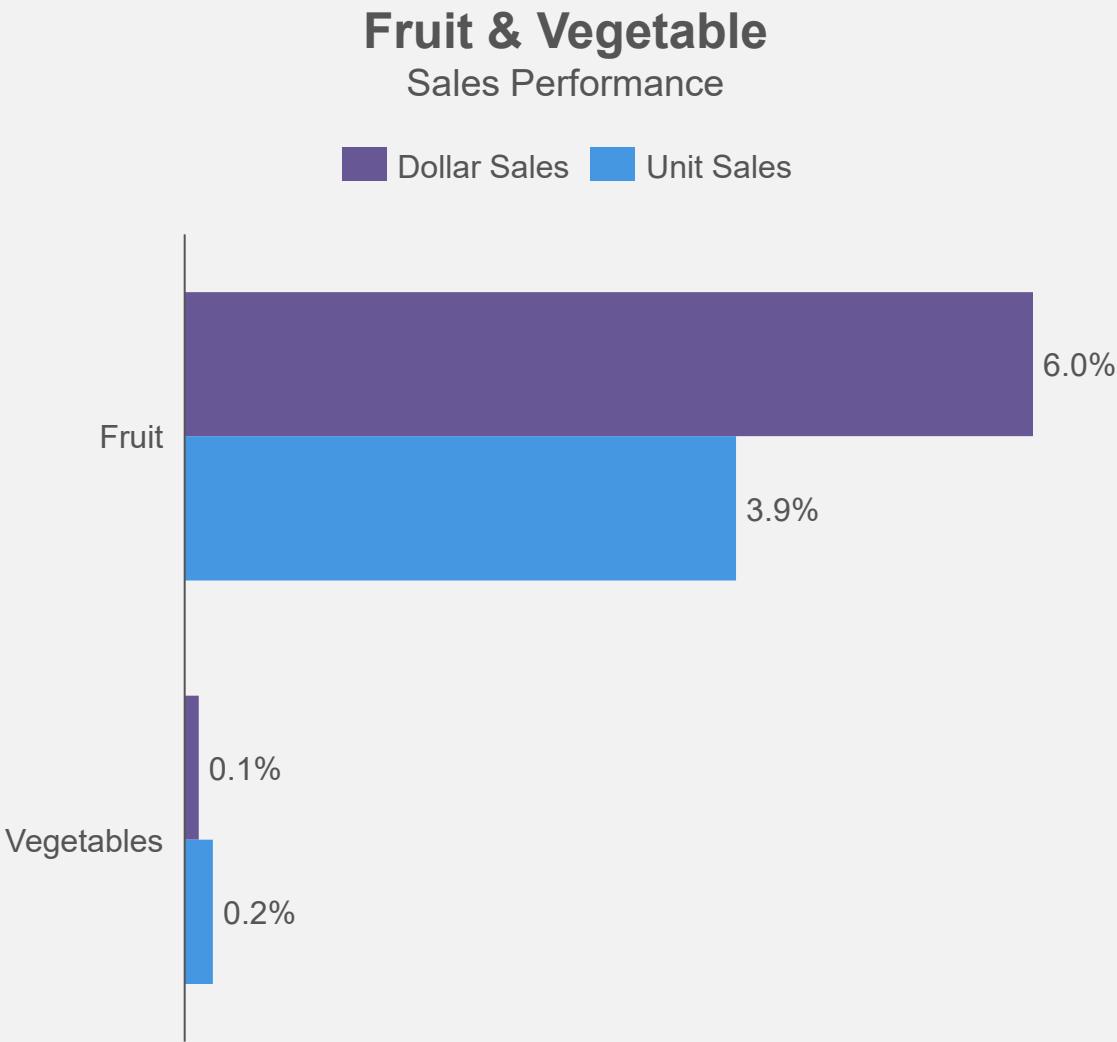
Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025



Fruit & veggies lead the department...



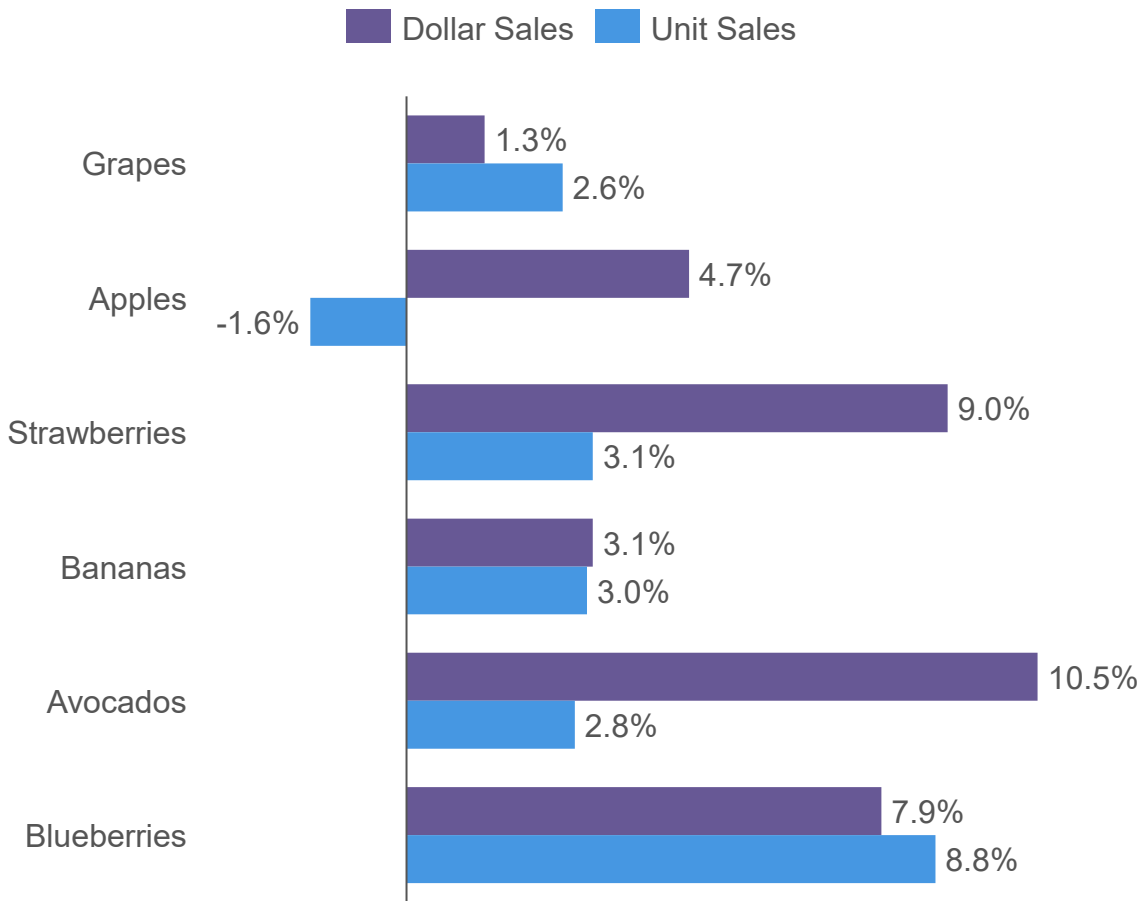
...fruit especially is contributing growth



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025

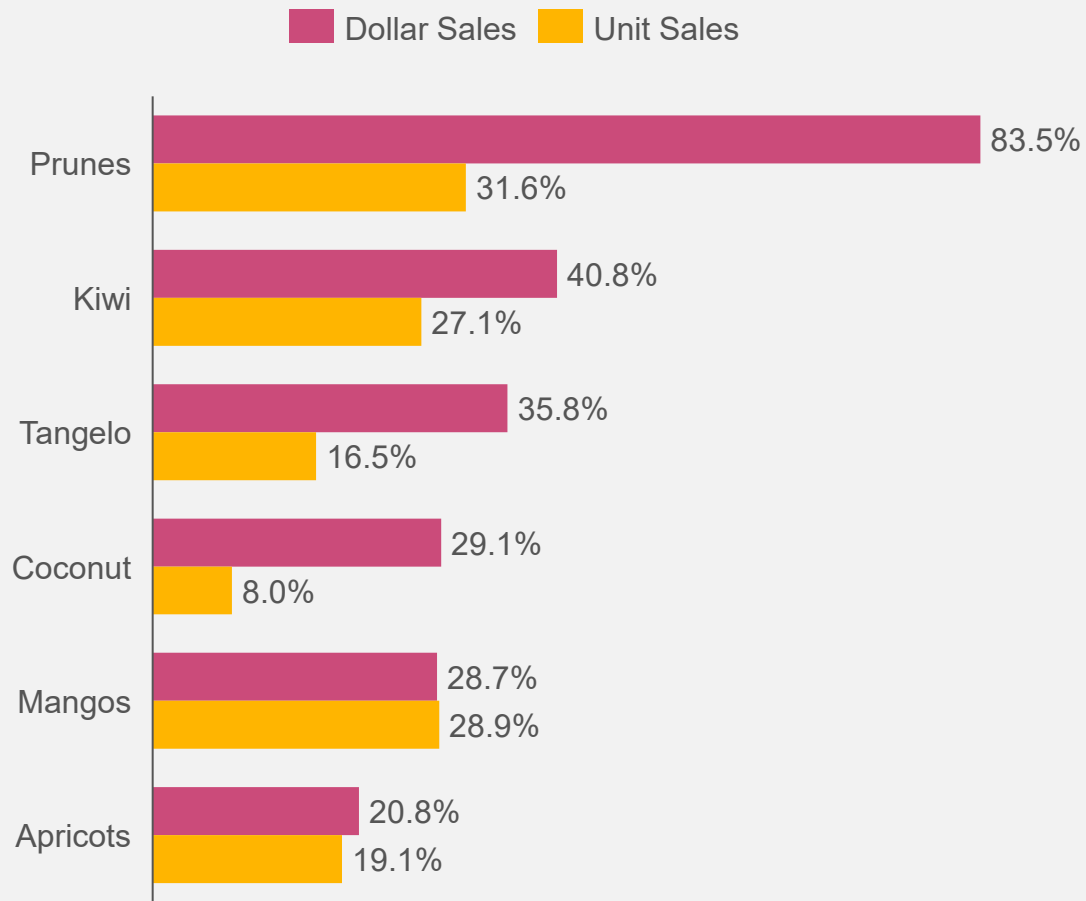
Fruit's largest categories are growing...

Largest Fresh Fruit Category Sales Growth Rates



...along with strong momentum elsewhere

Fastest Growing Fresh Fruit Category Sales Growth Rates



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025

TOP FRUITS

% of restaurants that offer that fruit...

TOP <i>ranked by total penetration</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Orange	72.6%	+2%	-5%
Lemon	67.5%	+1%	-1%
Pineapple	59.2%	+2%	-1%
Strawberry	55.4%	+3%	+5%
Lime	53.3%	+1%	+2%
Apple	49.6%	-1%	-15%
Avocado	46.5%	-	-1%
Mango	43.5%	+3%	+12%
Cherry	39.2%	+4%	-3%
Raspberry	37.7%	+2%	-3%



TOP FRUITS

% of menu items that feature that fruit...

TOP <i>ranked by total incidence</i>	2015 Incidence	Q2 2025 Incidence	1-YEAR GROWTH	4-YEAR GROWTH	10-YEAR GROWTH
Avocado	1.4%	2.1%	+1%	+10%	+45%
Lemon	1.7%	1.9%	-	+1%	+16%
Lime	1.2%	1.8%	+3%	+12%	+56%
Orange	1.4%	1.4%	+1%	-8%	+2%
Pineapple	1.0%	1.3%	+1%	+15%	+29%
Strawberry	0.9%	1.0%	+1%	-1%	+13%
Mango	0.6%	0.8%	+2%	+16%	+41%
Apple	1.0%	0.7%	-4%	-24%	-30%
Cherry	0.5%	0.5%	-4%	-17%	-9%
Raspberry	0.6%	0.5%	-3%	-19%	-16%



GROWING FRUITS (EARLY STAGE)

% of restaurants that offer that fruit...

TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Soursop	0.3%	-6%	+150%
Lucuma	0.3%	+8%	+100%
Guarana	0.5%	+13%	+44%
Calamansi	0.5%	+21%	+44%
Green Grape	0.3%	-13%	+27%
Elderberry	0.6%	-12%	+25%
Grilled Peach	0.5%	+16%	+22%
Morello	0.2%	-15%	+22%
Mission Fig	0.7%	+30%	+13%
Glera	0.8%	-	+2%



GROWING FRUITS (ESTABLISHED)

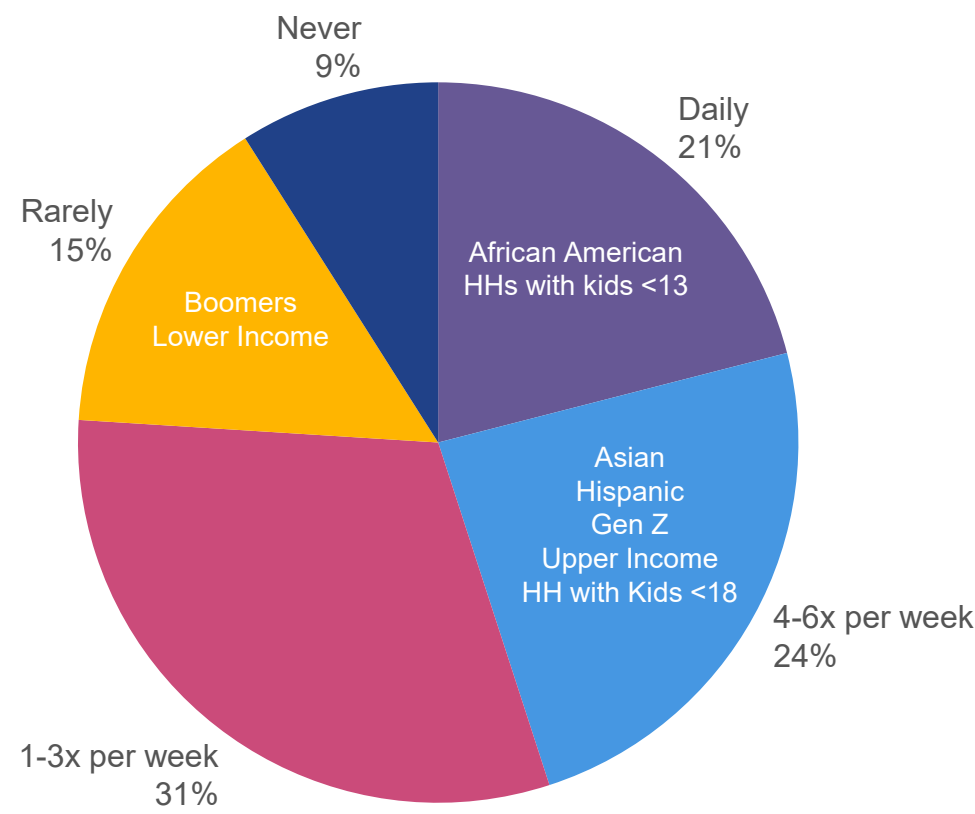
% of restaurants that offer that fruit...

TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Dragon Fruit	3.1%	+37%	+125%
Prickly Pear	3.6%	+16%	+41%
Yuzu	6.2%	+7%	+40%
Guava	8.2%	-	+35%
Lychee	7.3%	+10%	+35%
Watermelon	15.3%	+5%	+34%
Ume	1.0%	+2%	+25%
Rhubarb	3.3%	+6%	+22%
Bergamot	1.3%	-	+20%
Amarena Cherry	1.2%	-2%	+19%



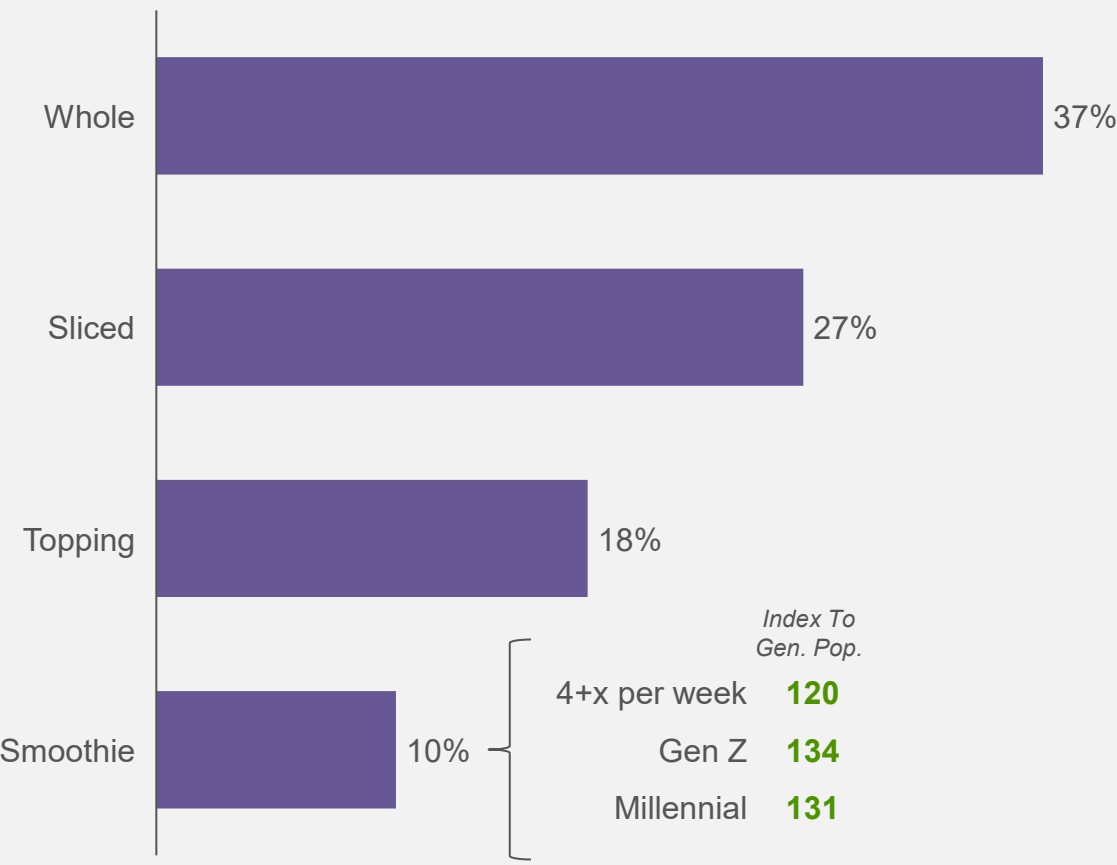
45% have fruit at breakfast 4x+ per week...

Frequency Of Having Fruit At Breakfast



...favoring whole fruit as their go-to option

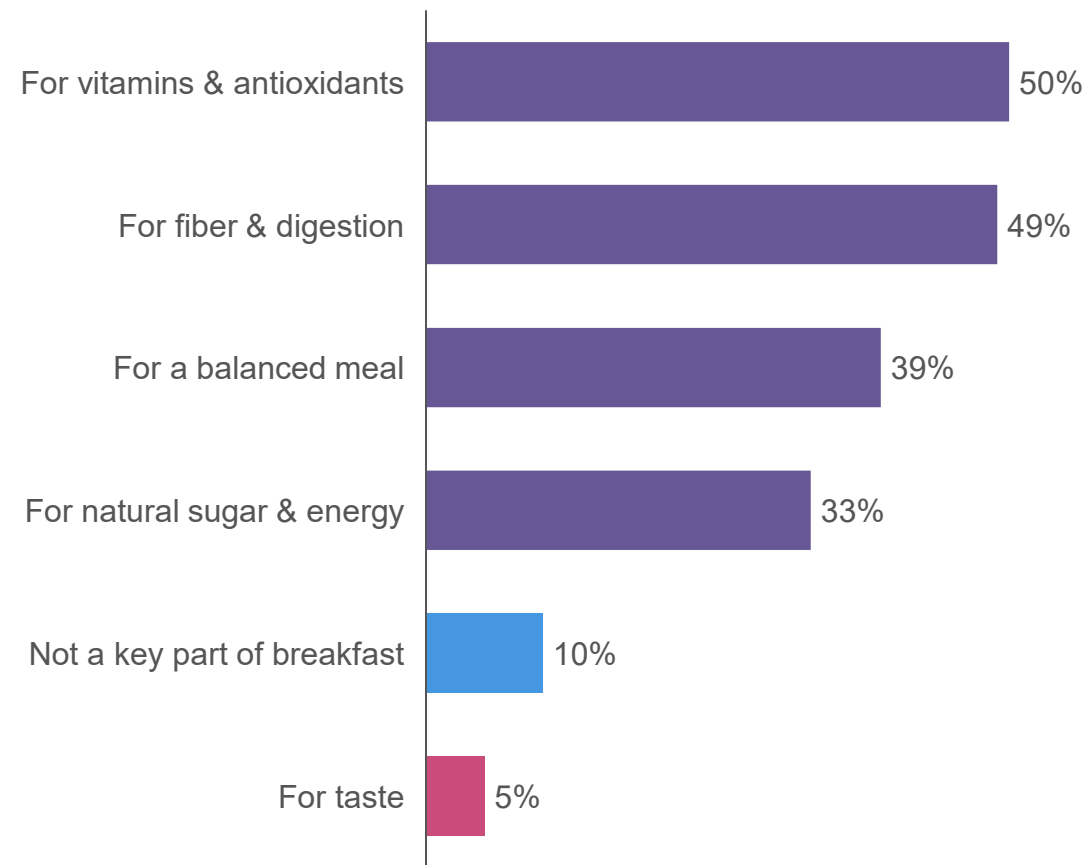
Form Of Fruit At Breakfast



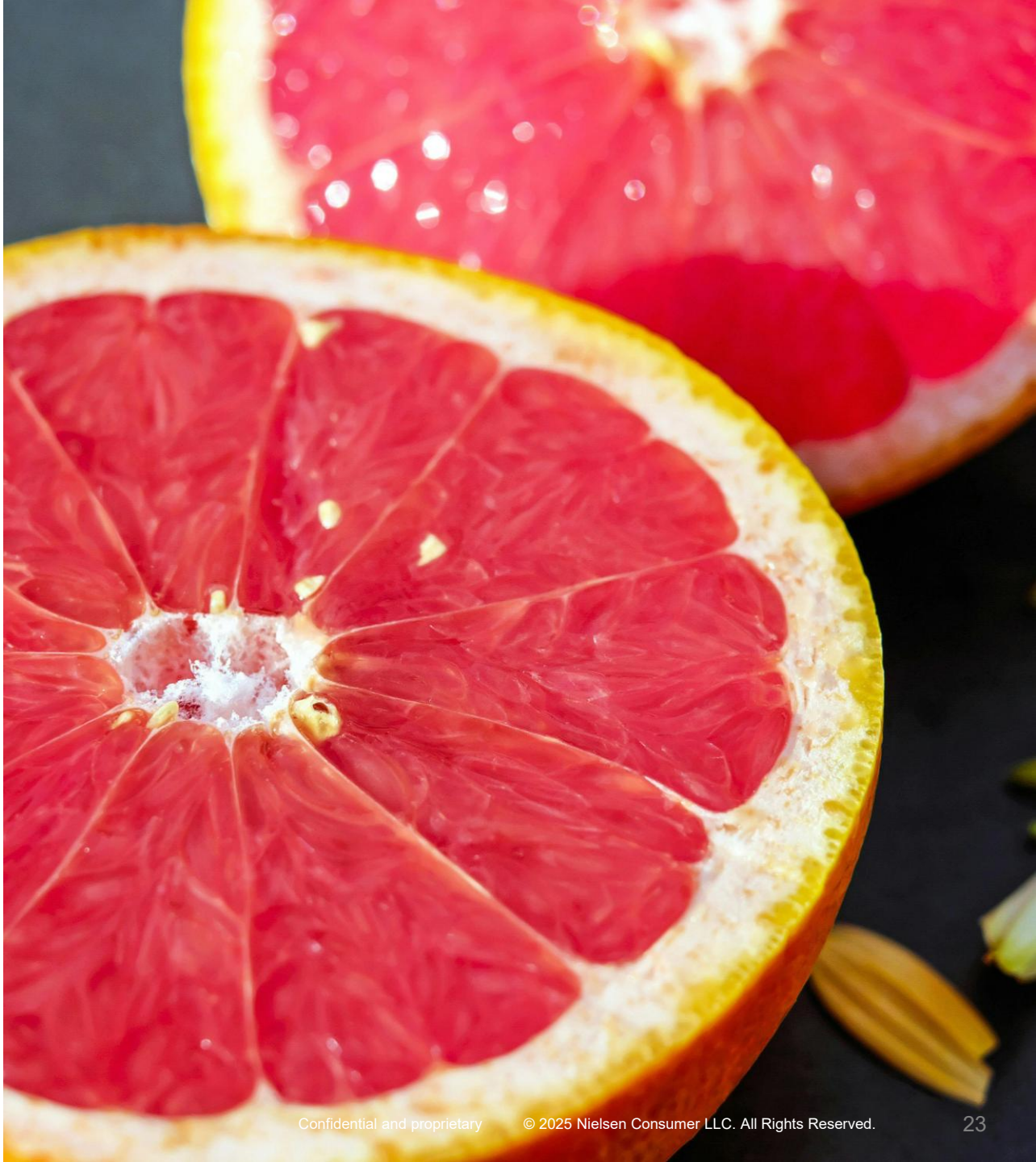
Source: NIQ, BASES Quick Question Omnibus Survey, July 2025, n=1,020

Fruit rises to the occasion

Fruit as a Meaningful Source of Nutrition at Breakfast



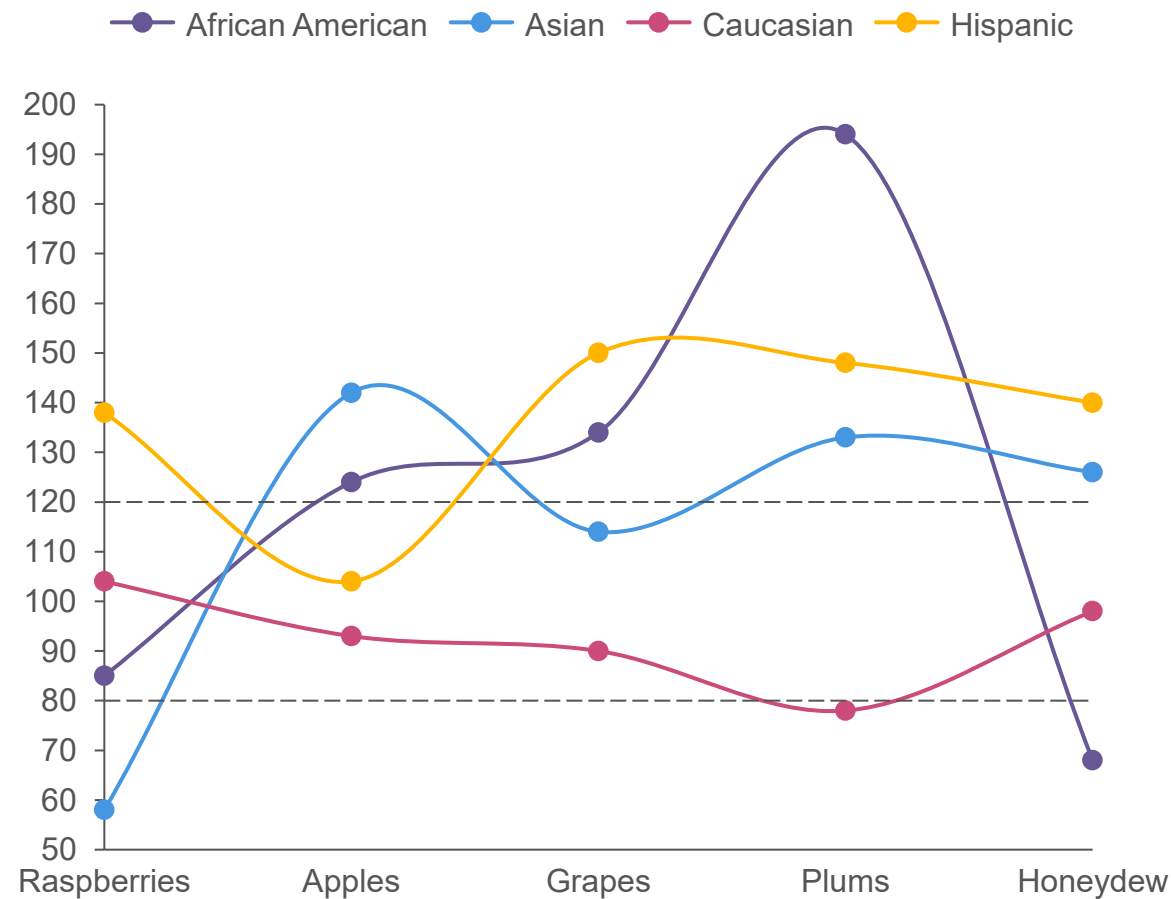
Source: NIQ, BASES Quick Question Omnibus Survey, July 2025, n=1,020



At breakfast, consumers have go-to favorites

Breakfast Fruit Preferences

By Race & Ethnicity

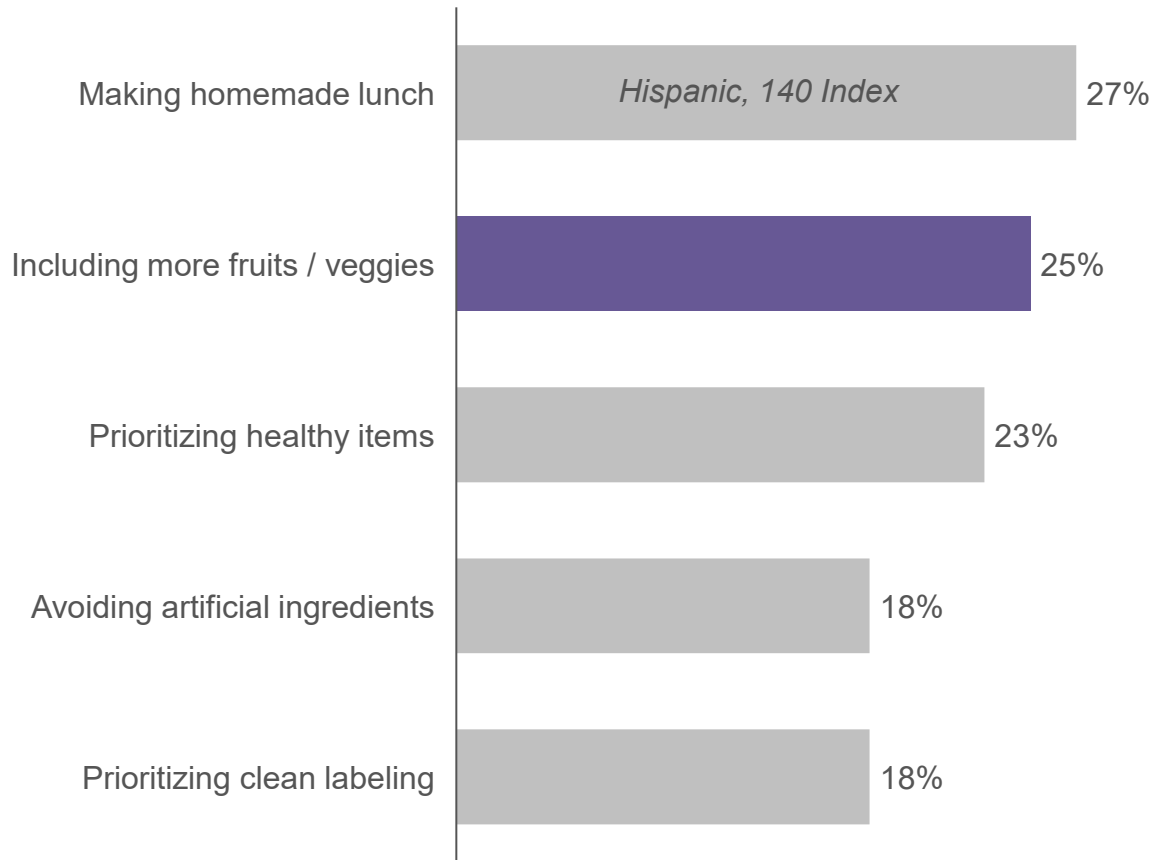


Source: NIQ, BASES Quick Question, Breakfast Meal Occasion Survey, June 2025, n=1,005
Note: Index value ≥120 indicates above average significance, <80 indicates below average significance



Its not just breakfast, its back-to-school...

Approach to School Lunch / Snacks this Year

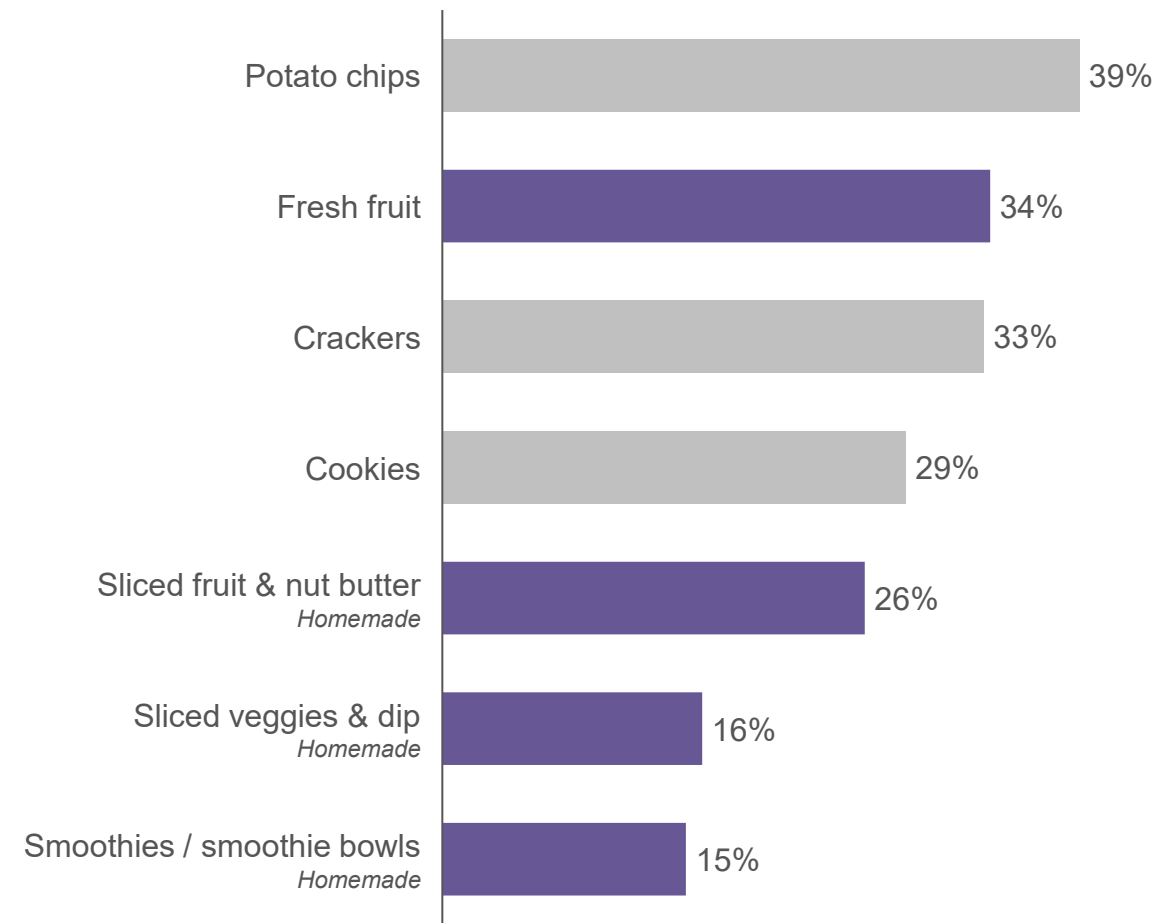


Source: NIQ, BASES Quick Question Omnibus Survey, September 2025, n=1,006



...its snacking occasions...

Common Snack Foods



Source: NIQ, BASES Quick Question Omnibus Survey, July 2025, n=1,020



...and even social media trends that are fueling fruit & veggie growth



Chaos Cakes
Posts surged +45%



Butter Boards
Visual & interactive



Smoothie Bowls
Nutritious



Loaded Cereal
Creative & decadent



Pickle Pizza
Quirky flavor combos

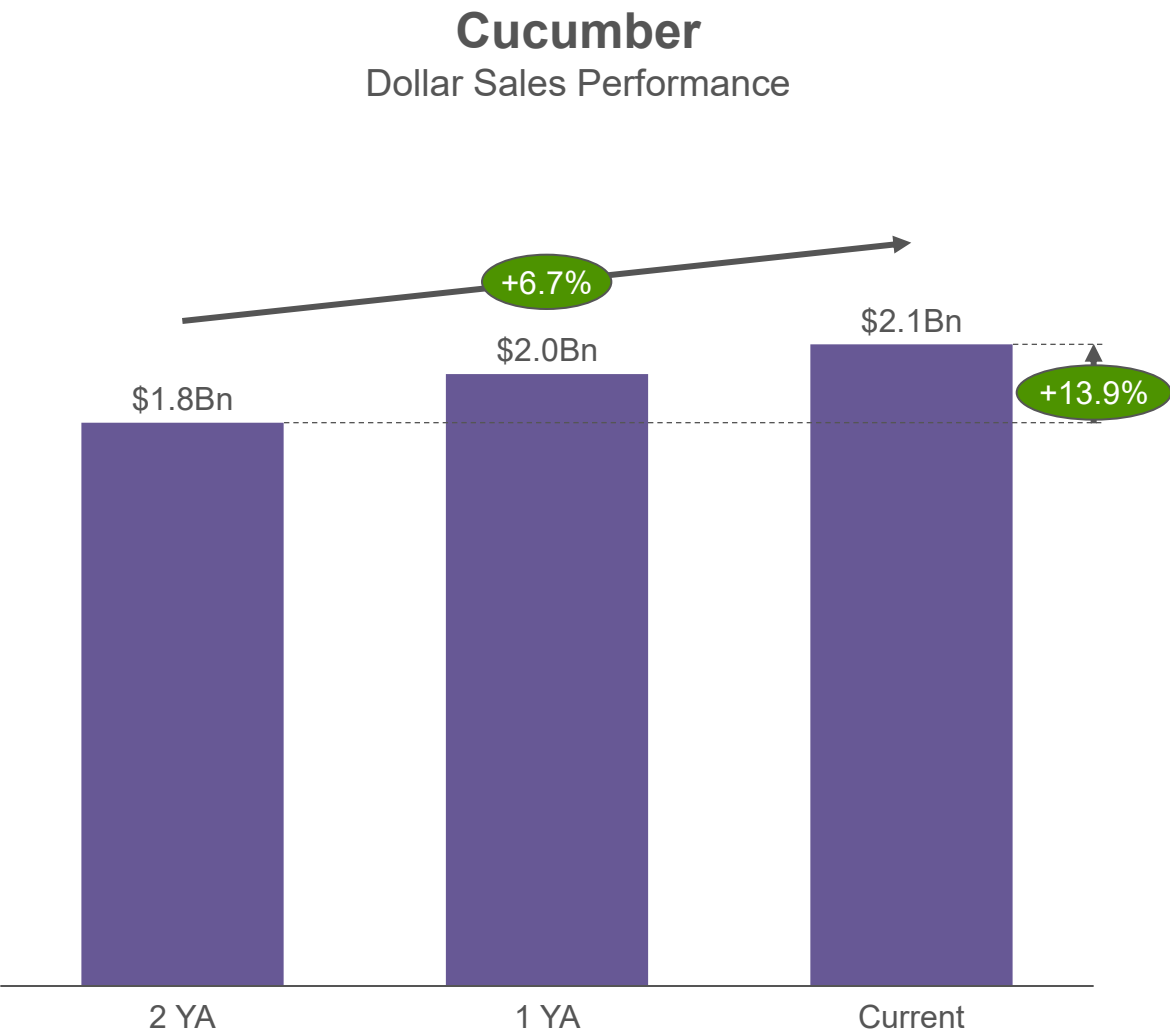


Smashed Potatoes & Feta
ASMR-worth crisp



Stuffed Dates
Healthy "candy"

Cucumber salad went viral on TikTok



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025



English Cucumber

2.7M views



myhealthydish
an entire Cucumber

I've been influenced by



mallory.tts.reviews

Creamy Cucumber Salad



earthangel.007

#duet with @Logan



CUCUMBER KIMCHI

life.with.chandni

1 medium sized English



teamterryketo

Homemade dill pickles!



soogia1

Easiest way to eat an

TOP VEGGIES

% of restaurants that offer that veggie...

TOP <i>ranked by total penetration</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Pepper	94.4%	-	-
Onion	92.0%	-	-1%
Tomato	84.9%	-	-1%
Potato	83.1%	-	-
Bean	72.7%	-	-3%
Mushroom	72.6%	-1%	-4%
Lettuce	71.2%	-	-2%
Cucumber	59.1%	-	+1%
Jalapeno Pepper	56.6%	+1%	+1%
Spinach	51.3%	-1%	-6%



TOP VEGGIES

% of menu items that feature that veggie...

TOP <i>ranked by total incidence</i>	2015 Incidence	Q2 2025 Incidence	1-YEAR GROWTH	4-YEAR GROWTH	10-YEAR GROWTH
Onion	7.0%	9.3%	+4%	+26%	+33%
Pepper	6.5%	8.9%	+4%	+27%	+36%
Tomato	7.2%	7.9%	+2%	+12%	+9%
Lettuce	3.5%	4.3%	+7%	+25%	+24%
Bean	3.4%	3.9%	+4%	+20%	+16%
Mushroom	3.3%	3.4%	+2%	+11%	+1%
Potato	3.1%	3.1%	-1%	-2%	-
Cucumber	1.3%	1.6%	+2%	+10%	+28%
Spinach	1.6%	1.5%	-	-1%	-7%
Jalapeno Pepper	1.0%	1.4%	+8%	+15%	+52%



GROWING VEGGIES (EARLY STAGE)

% of restaurants that offer that veggie...

TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Lion's Mane	0.3%	+50%	+114%
Sungold Tomato	0.4%	+11%	+100%
Cocktail Onion	0.2%	+43%	+100%
Tobacco Onions	0.3%	+18%	+86%
Sweetie Drop	0.2%	-14%	+71%
Chaga	0.2%	+43%	+66%
Maui Onion	0.7%	+37%	+43%
Pigeon Pea	0.2%	+11%	+43%
Persian Cucumber	0.7%	-13%	+37%
Taggiasca Olive	0.2%	+22%	+37%



GROWING VEGGIES (ESTABLISHED)

% of restaurants that offer that veggie...

TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Ube	1.1%	+17%	+217%
Aleppo Pepper	1.3%	+25%	+60%
Habanero Pepper	12.1%	+9%	+49%
English Cucumber	1.1%	+15%	+45%
Gem Lettuce	1.9%	+30%	+40%
Summer Squash	1.1%	-7%	+38%
Castelvetrano Olive	1.2%	+9%	+33%
Elote	3.6%	-1%	+31%
Ghost Pepper	1.5%	+18%	+30%
Pickled Radish	1.3%	+7%	+30%



Sustainability, Wellness and Clean label attributes growing in Produce

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Environmental Sustainability	Family Farmed	+6.6%	+7.3%	Prepackaged salads
				Green beans
				Potatoes
				Carrots
	Sustainability certified	+19.6%	+14.0%	Potatoes
				Prepackaged salads
	Eco Friendly	-0.5%	+0.8%	Prepackaged salads
				Potatoes

Sustainable Packaging	All sustainable packaging	+4.5%	+5.6%	Watermelons
				Blueberries
				Pineapples
	Biodegradable	+40.9%	+26.9%	Apples

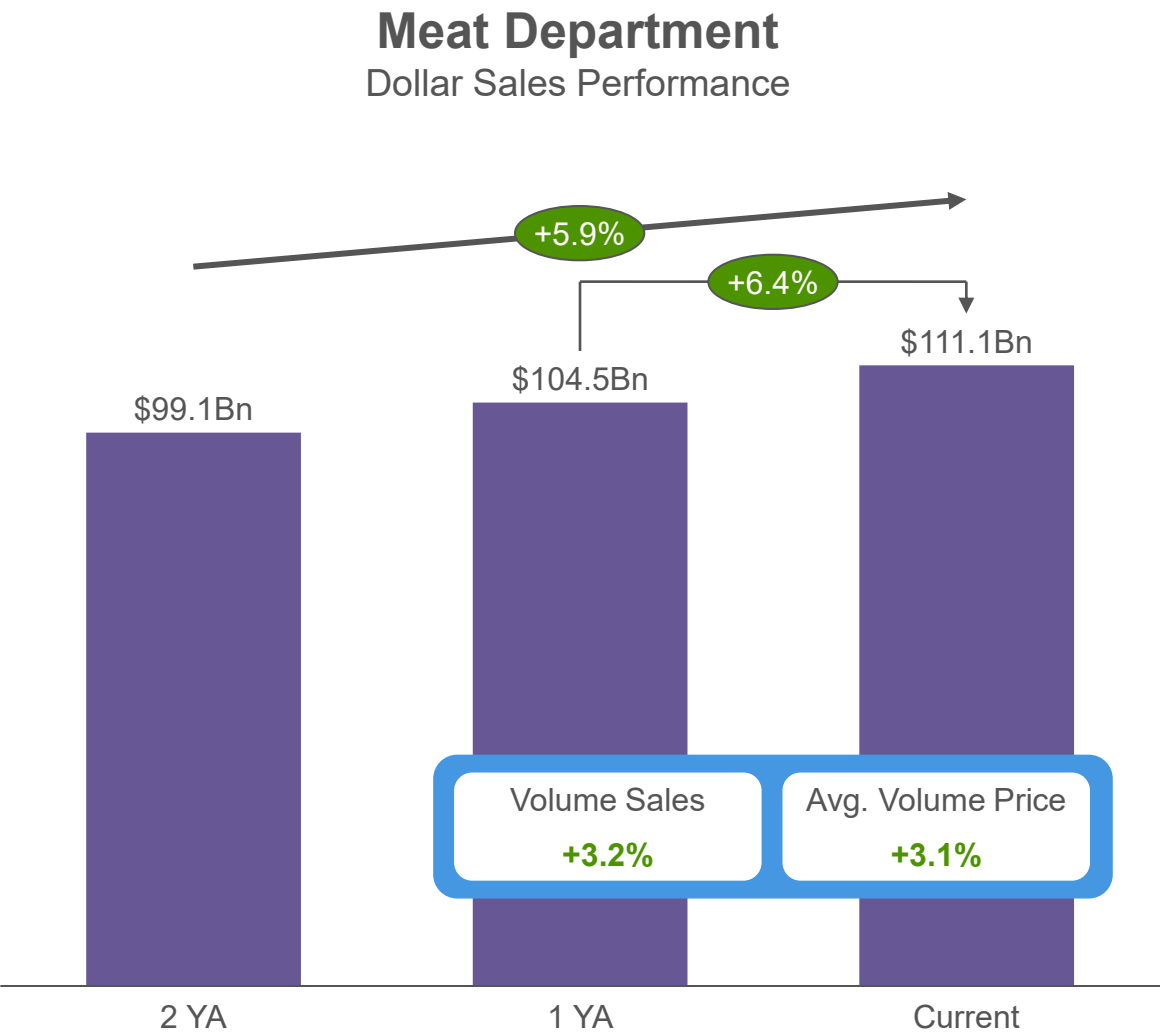
Social Responsibility	Fair Trade	-2.8%	+0.5%	Bell peppers
	Responsibly Sourced	+6.3%	+6.0%	Prepackaged salads
	B Corporation	+16.6%	+15.0	Prepackaged salads

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Clean Label	Free from Pesticide	+13.0%	+12.1%	Prepackaged salads
				Lettuce
				Sprouts
				Mushrooms
	Free from Herbicide	+27.1%	+26.5%	Prepackaged salads
				Tomatoes
				Lettuce
	Non-GMO	+10.3%	+9.3%	Tomatoes
				Grapes
				Cucumbers
Organic	Organic certification	+5.3%	+3.1%	Avocados
				Pomegranate
				Blueberries
				Avocados
				Cucumber
				Bananas
				Avocados
				Green Beans

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US xAOC ; Produce department, NPI ESG Sustainability stated attributes; \$ and Units % change vs year ago; 52 weeks ending September 6, 2025

A look at the latest protein trends...

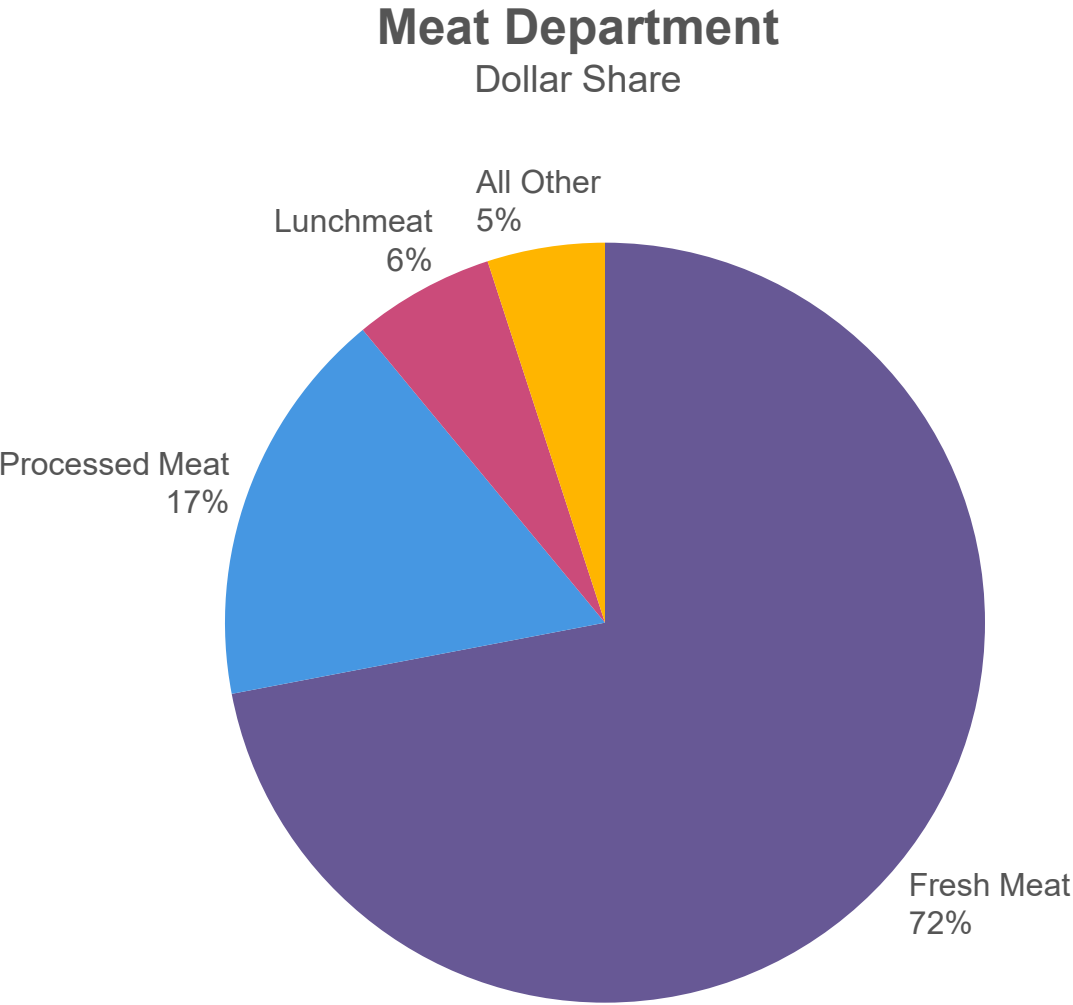
The meat department is growing



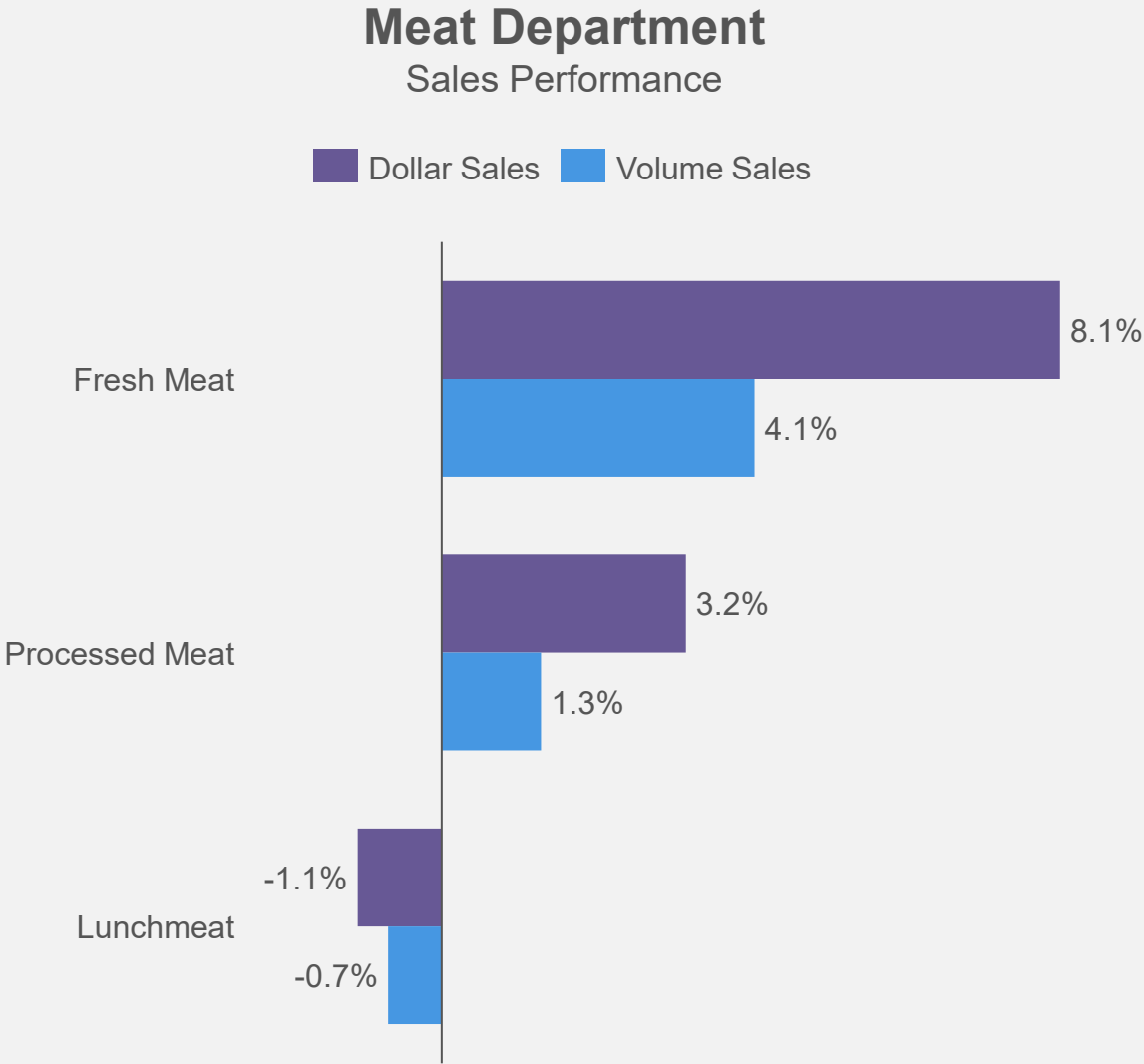
Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025



Fresh meat drives the department...



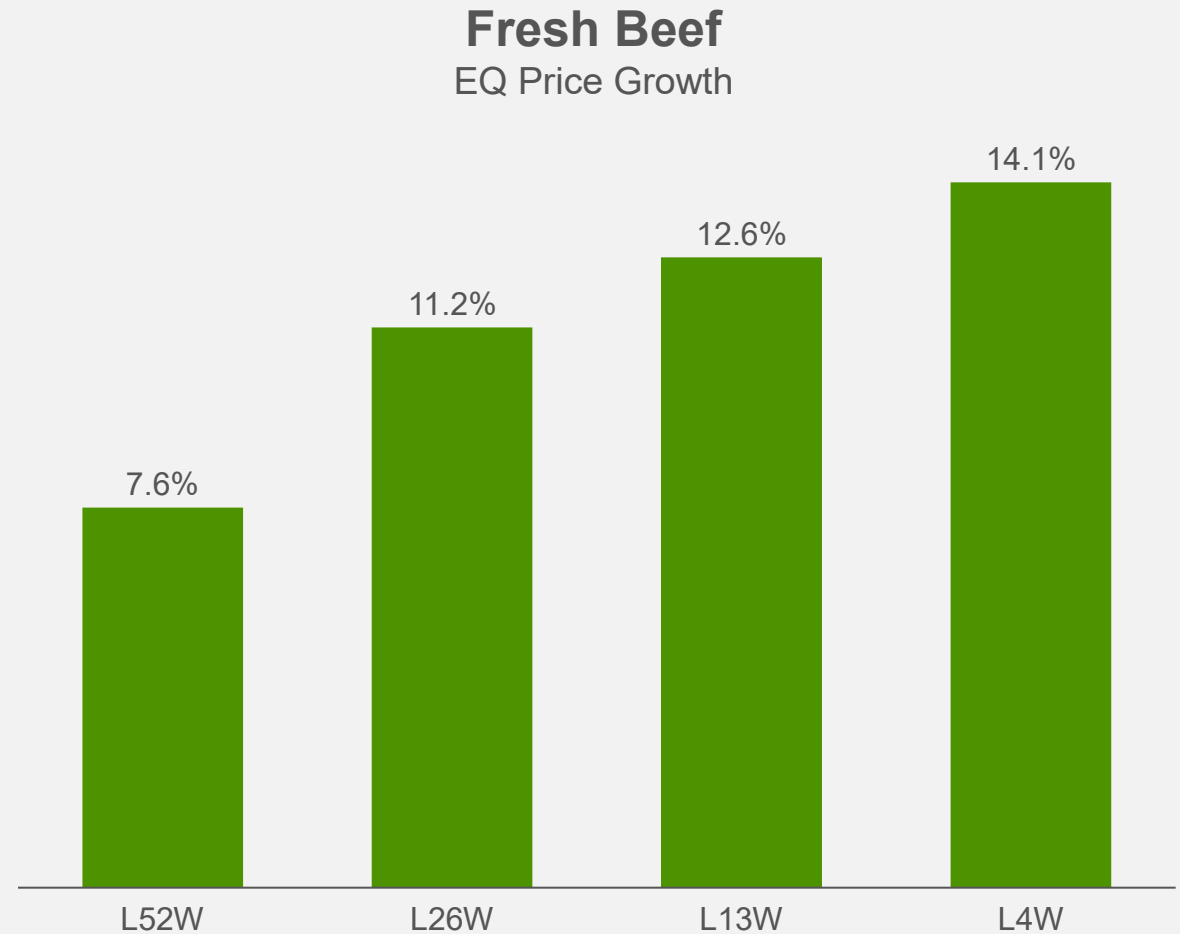
...and where the largest growth is



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025

73% have noticed
higher
fresh meat prices

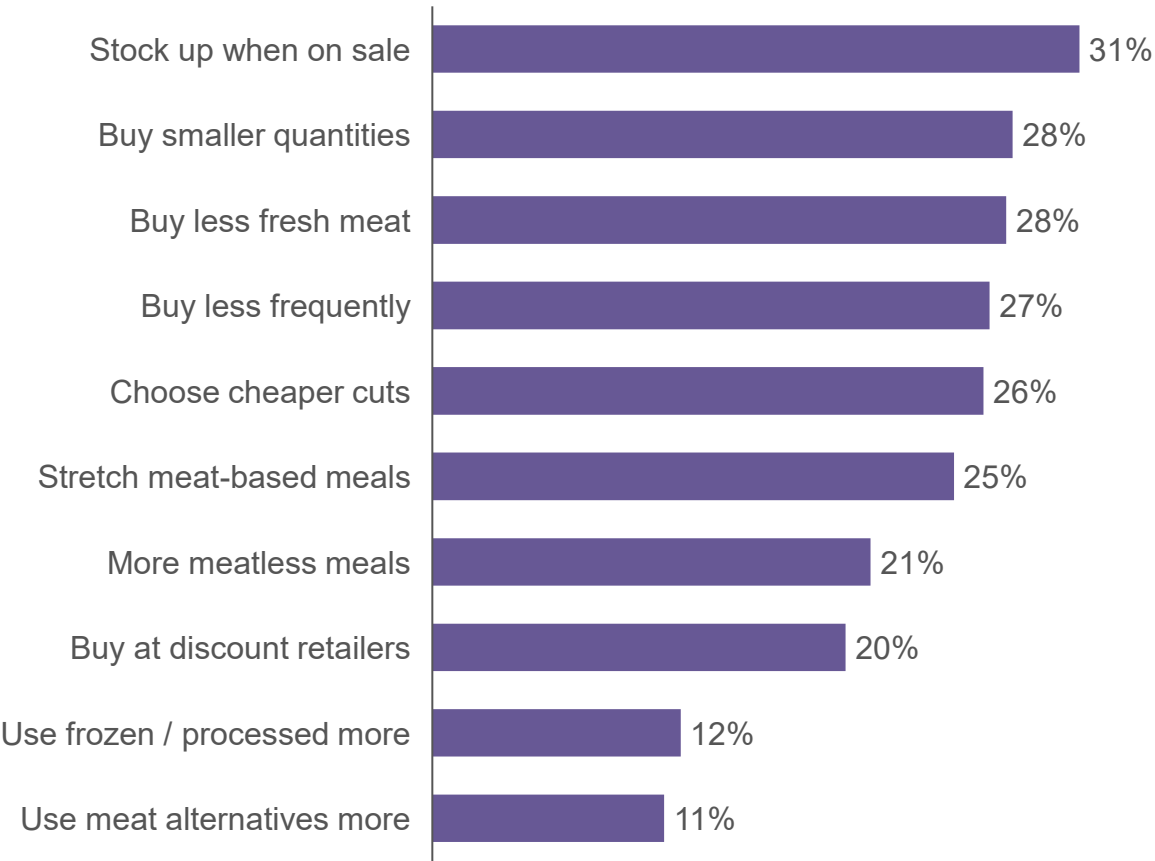
Inflation continues to push fresh beef prices



Left Source: NIQ, BASES Quick Question Omnibus Survey, August 2025, n=1,020
Right Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025

Meat shoppers are being forced to adapt...

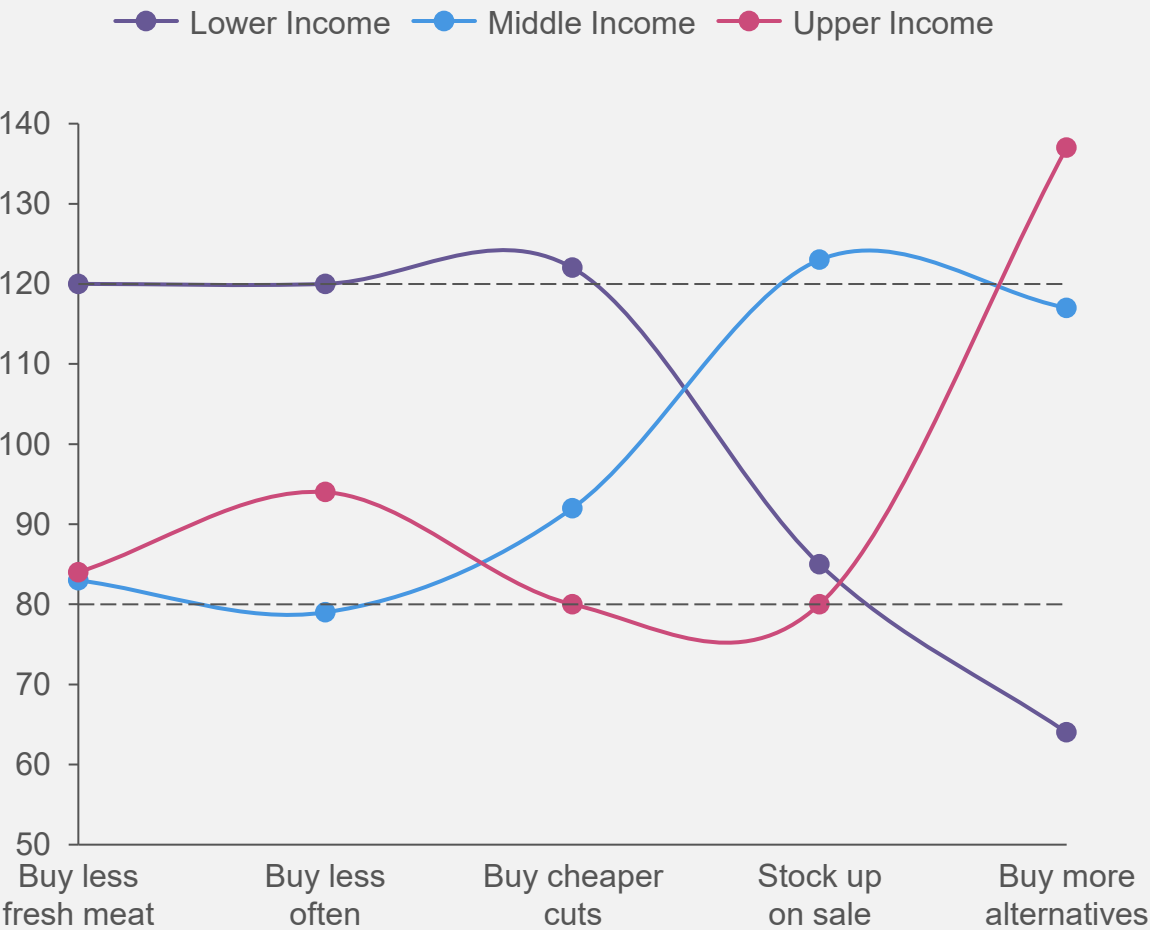
Impact of Rising Fresh Meat Prices on Shopping Habits



Source: NIQ, BASES Quick Question Omnibus Survey, August 2025, n=1,020

...at all income levels

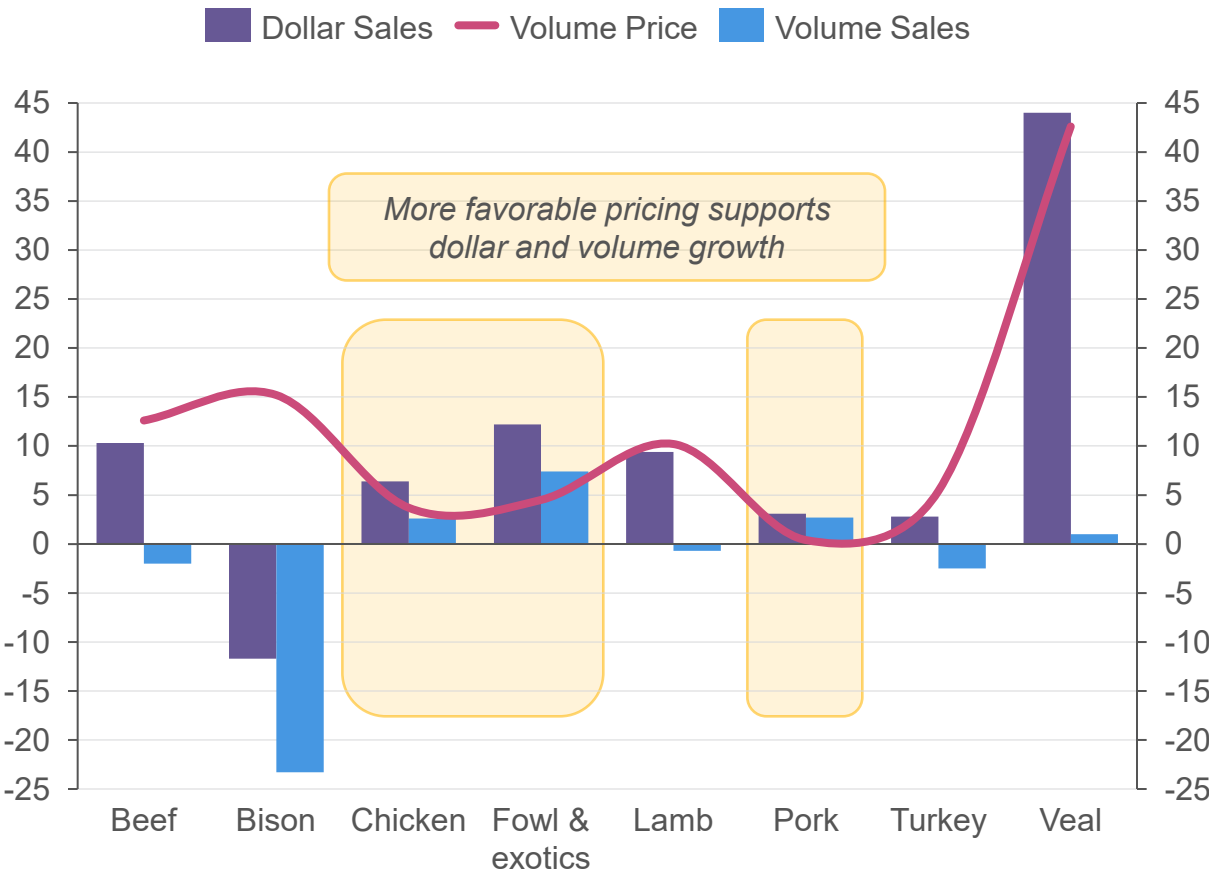
Impact of Fresh Meat Inflation on Shopping Habits, by Income Level



Inflation is changing what's in the basket...

Fresh Meat % Change

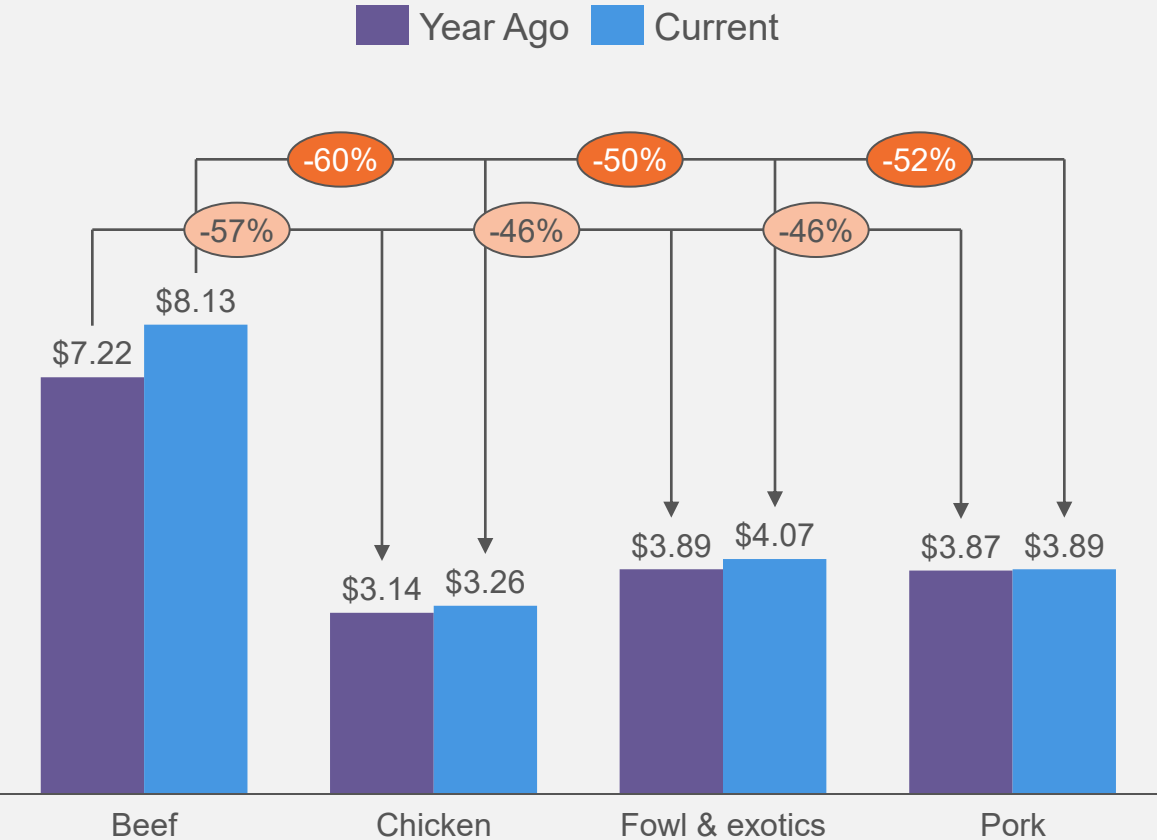
Latest 13 Weeks vs. YA



...as the gap to fresh beef widens

Change in Volume Price Gap to Fresh Beef

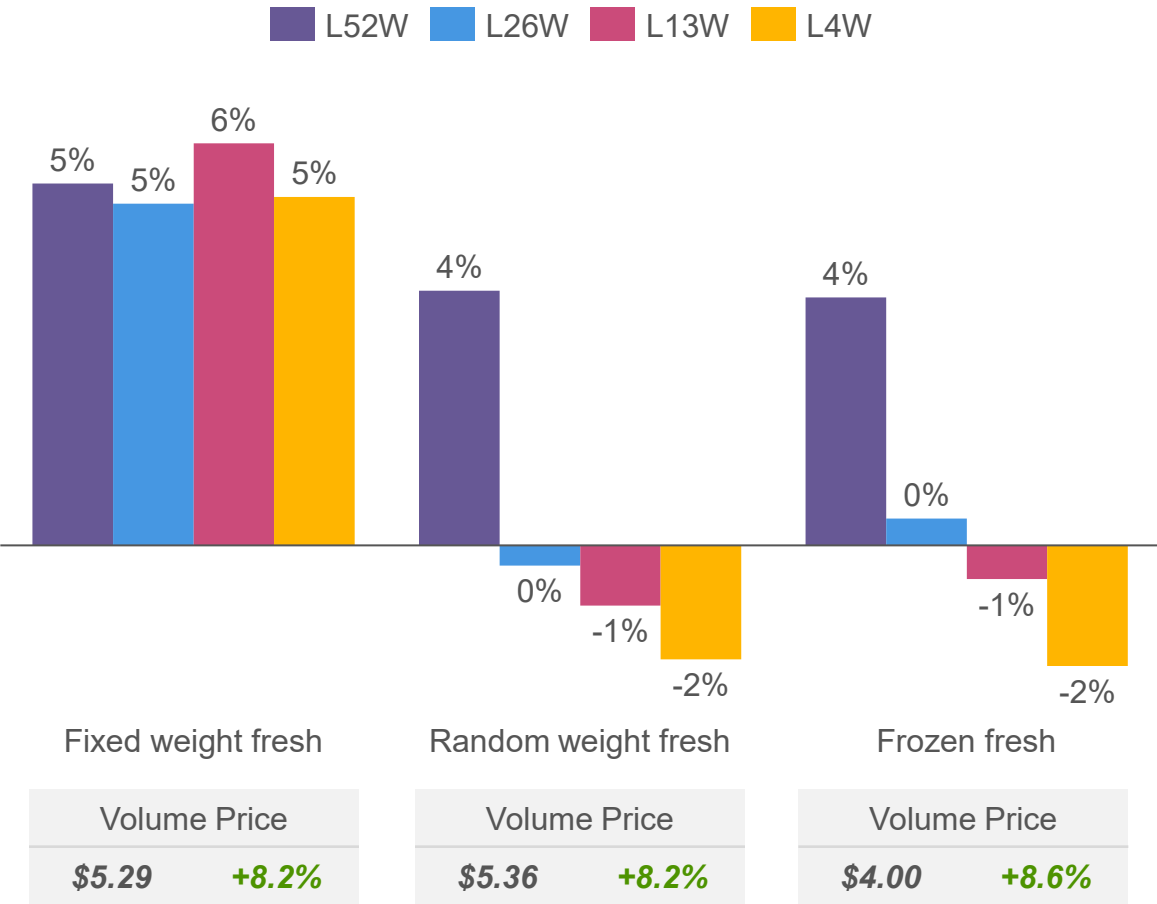
to Fresh Beef



Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 13 Weeks Ending 9/6/2025

Fixed weight fresh is growing despite prices

Fresh Meat Volume Change Meat vs. Frozen Departments



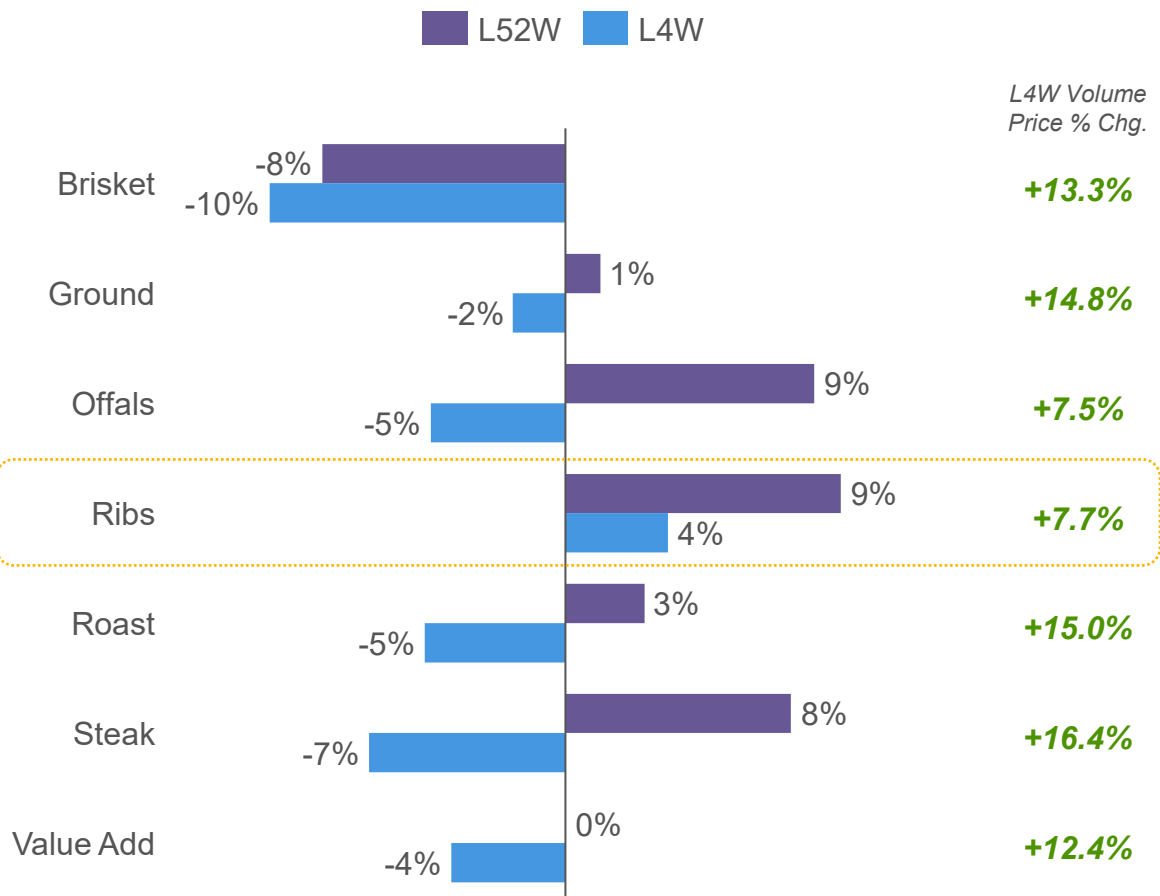
Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025



Ribs sustained volume and price growth...

Fresh Meat Category

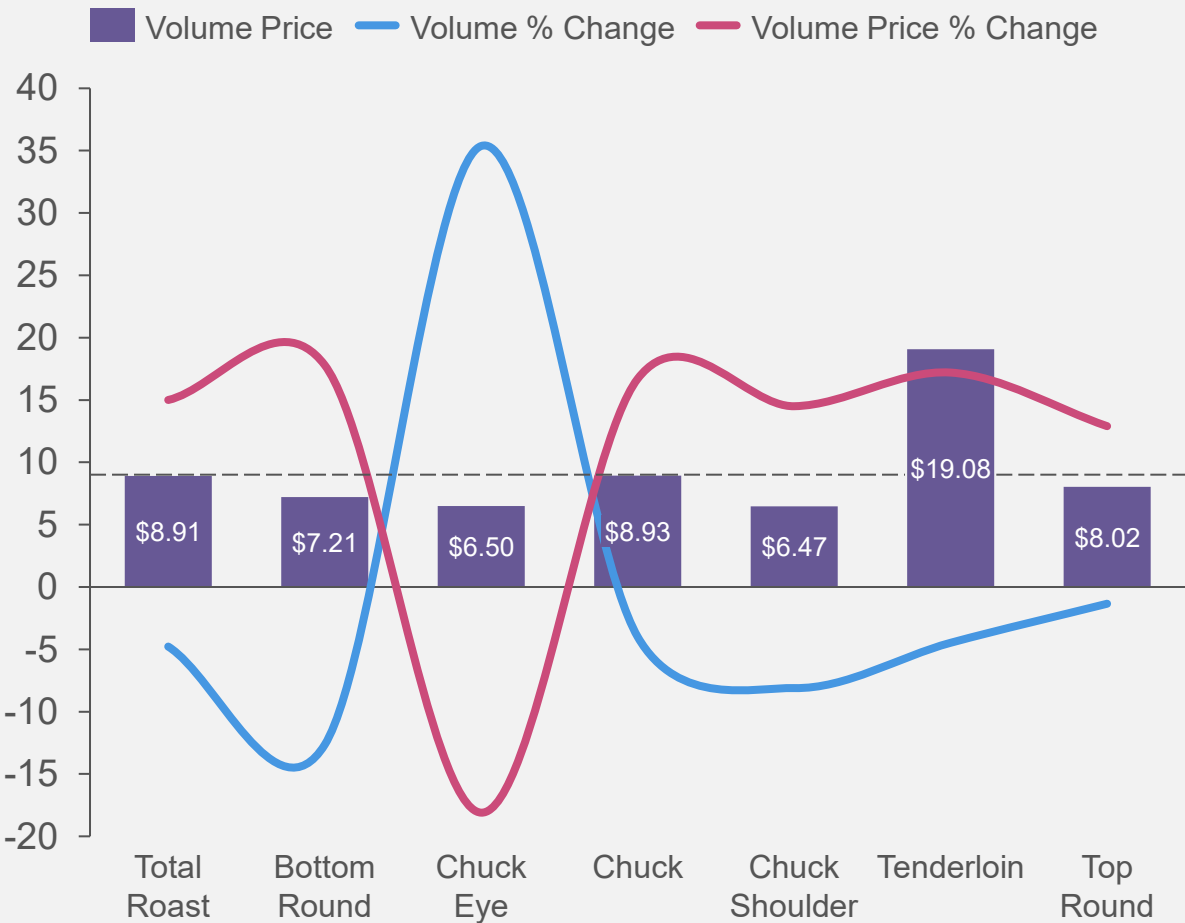
Volume Sales Performance



...in roasts, lower priced chuck eye won

Fresh Roast

% Change Latest 4 Weeks vs. YA



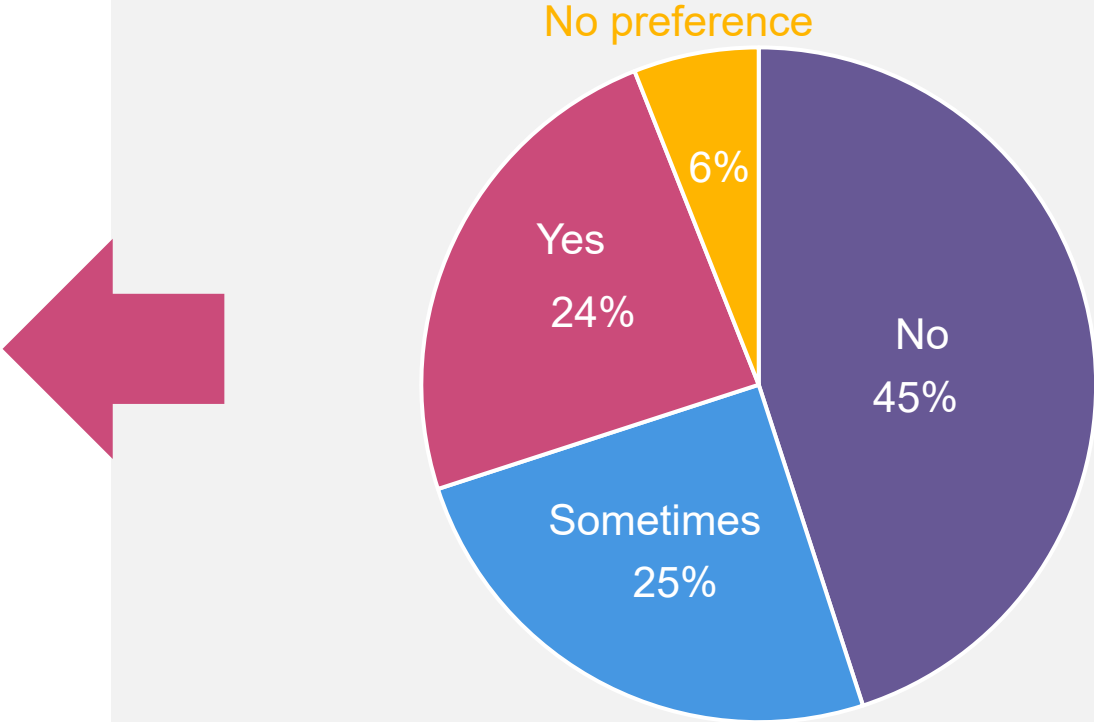
Source: NIQ, Retail Measurement Services, Full View Measurement, Total US, 52 Weeks Ending 9/6/2025

While consumers prefer to do their own marinating and seasoning for grilling, when they do use marinades, new flavors are emerging

Fastest growing meat marinade flavors

- Creole butter*
- Garlic herb and wine*
- Brown sugar bourbon*
- Mojo*
- Roasted garlic and herb*
- Honey bourbon*
- Mojito lime*
- Honey teriyaki*
- Brazilian steakhouse*
- Caribbean*

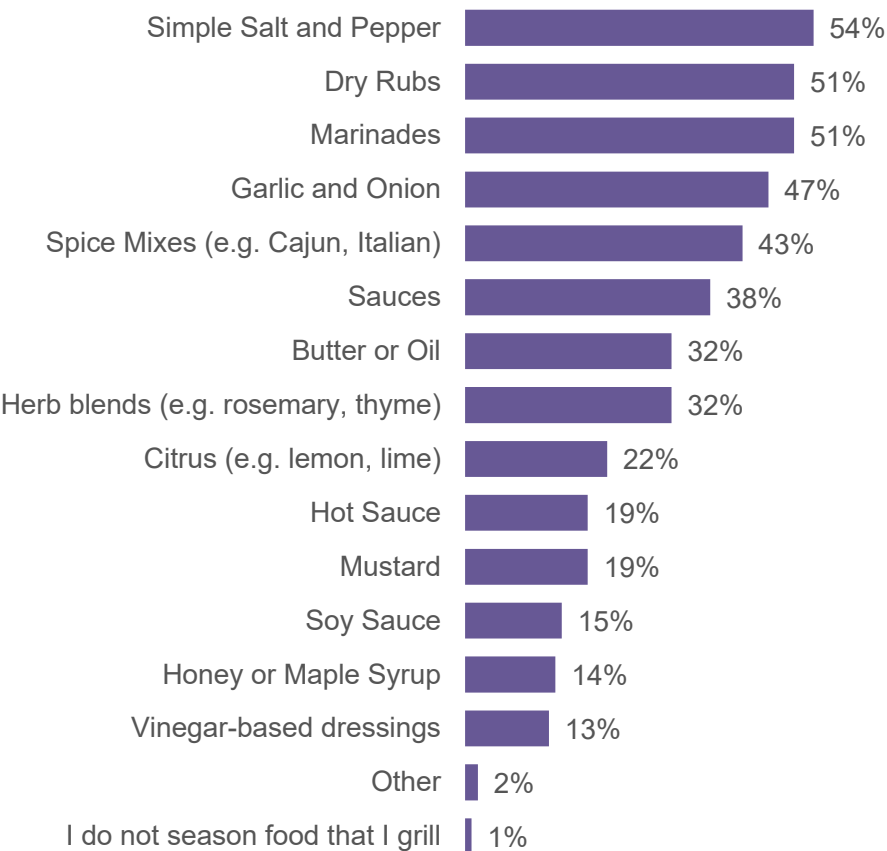
Do you prefer to use pre-marinated or pre-seasoned foods for grilling?



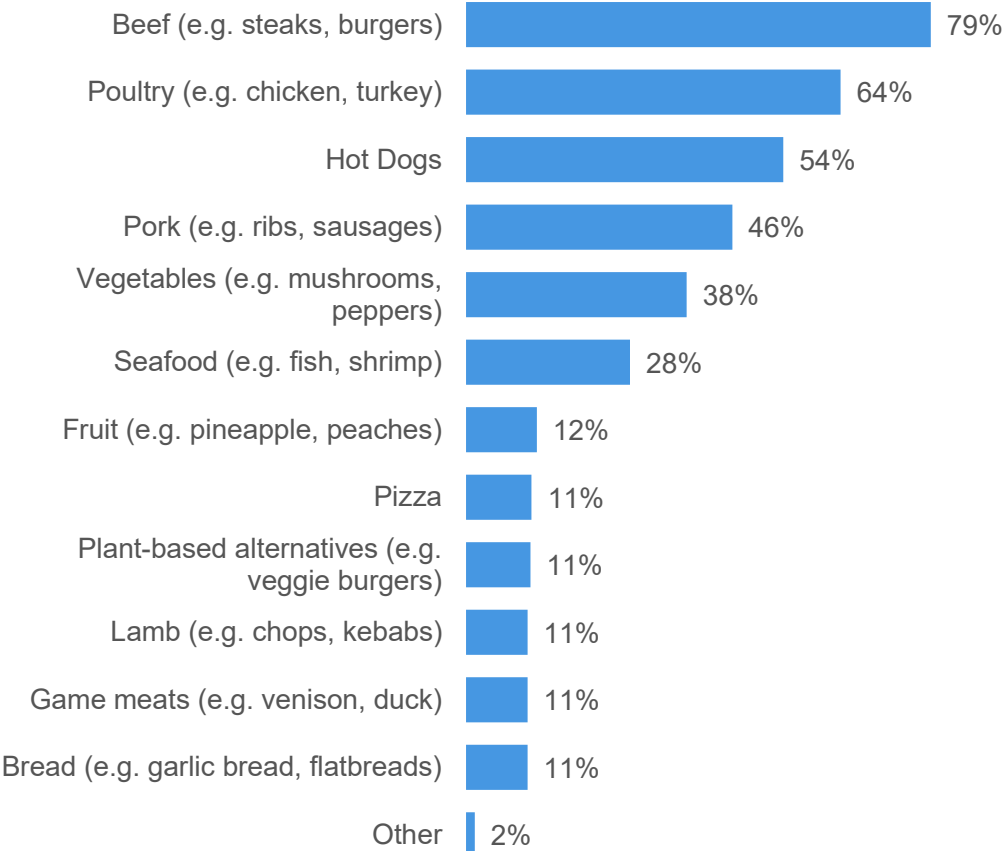
Source: NIQ, BASES Quick Question Omnibus Survey, April 2025, n=1,006

Simplicity and beef and chicken top the list for grilling seasoning

How do you typically season food for grilling?



What types of food do you plan to grill most often?



Source: NIQ, BASES Quick Question Omnibus Survey, April 2025, n=1,006

TOP PROTEINS

% of restaurants that offer that protein...

Little changes in the penetration of top proteins year over year or even over four years.

TOP <i>ranked by total penetration</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Chicken	95.1%	-	-
Beef	90.4%	-	-
Pork	89.8%	-	-1%
Seafood	84.3%	-	-2%
Fish	74.0%	-	-3%
Shellfish	68.5%	-	-2%
Bacon	68.1%	-	-2%
Egg	67.4%	-1%	-3%
Steak	67.0%	-	-1%
Sausage	66.7%	+1%	-1%



TOP PROTEINS

% of menu items that feature that protein...

Looking at percent of items that feature certain proteins we see growth for nearly all varieties.

TOP <i>ranked by total incidence</i>	2015 Incidence	Q2 2025 Incidence	1-YEAR GROWTH	4-YEAR GROWTH	10-YEAR GROWTH
Chicken	9.9%	10.8%	+1%	+13%	+9%
Seafood	10.4%	9.7%	+1%	+4%	-8%
Beef	7.4%	7.5%	+2%	+10%	-1%
Pork	6.5%	7.2%	+1%	+11%	+10%
Shellfish	6.6%	6.2%	+1%	+6%	-8%
Egg	3.0%	3.7%	+4%	+17%	+21%
Bacon	3.0%	3.7%	+1%	+11%	+21%
Fish	3.9%	3.6%	-	-1%	-11%
Sausage	2.2%	2.5%	-1%	+10%	+12%
Steak	2.4%	2.3%	+1%	+5%	-4%



GROWING PROTEINS (EARLY STAGE)

% of restaurants that offer that protein...

TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Plant Based Pepperoni	0.4%	-10%	+499%
Jalapeno Cheddar Sausage	0.5%	+53%	+225%
Beef Cheek	0.4%	+18%	+100%
West Coast Oyster	0.3%	-	+100%
Beef Bacon	0.4%	+40%	+91%
Australian Lamb	0.4%	+61%	+75%
Almond Flour	0.4%	+18%	+66%
Whole Lobster	0.4%	+50%	+63%
East Coast Oyster	0.5%	+4%	+62%
Pork Ribeye	0.3%	+33%	+60%



GROWING PROTEINS (ESTABLISHED)

% of restaurants that offer that protein...

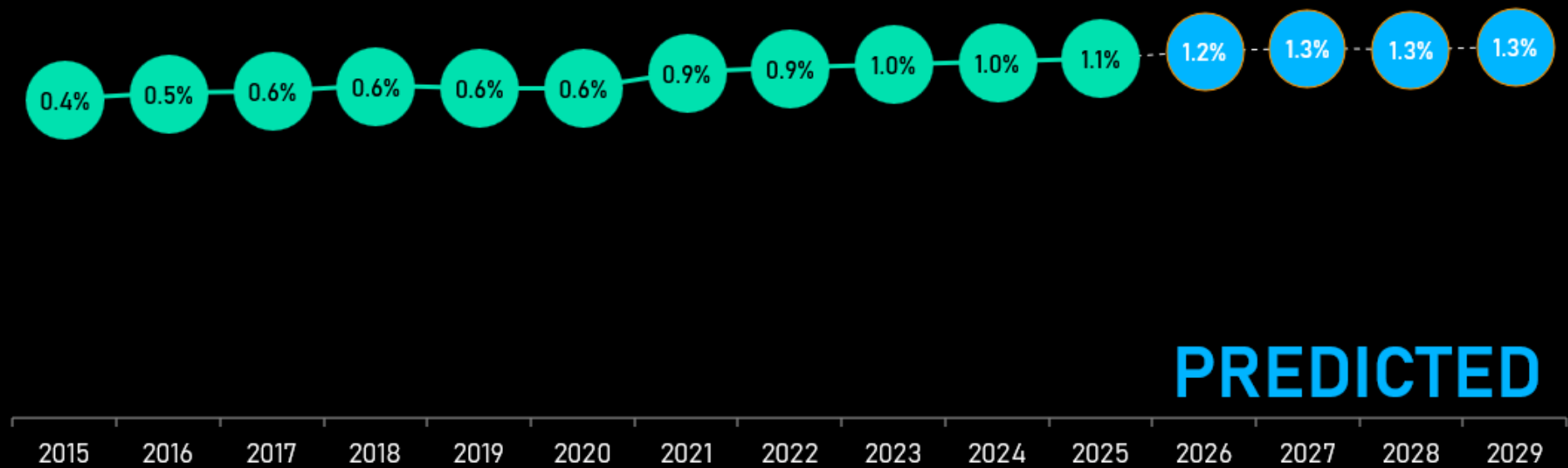
TRENDING <i>ranked by 4-year growth</i>	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Pepperoni Cups	1.0%	+54%	+409%
Charcuterie	1.8%	+79%	+291%
Burnt Ends	1.1%	+10%	+50%
Plant Based Chicken	2.0%	+9%	+35%
Boneless Wing	8.9%	+10%	+35%
Wagyu	4.8%	+9%	+33%
Popcorn Chicken	1.3%	+12%	+33%
Bone In Chicken	1.2%	-2%	+29%
Caviar	3.6%	+18%	+28%
Plant Based Sausage	1.9%	+1%	+26%



BURNT ENDS

MENU PENETRATION

% of US restaurant menus that feature; current year = annual data for year ending Q2 2025



PREDICTED

HISTORIC GROWTH

12-Month: +10%

4-Year: +50%

PREDICTED GROWTH

4-Year: +18%

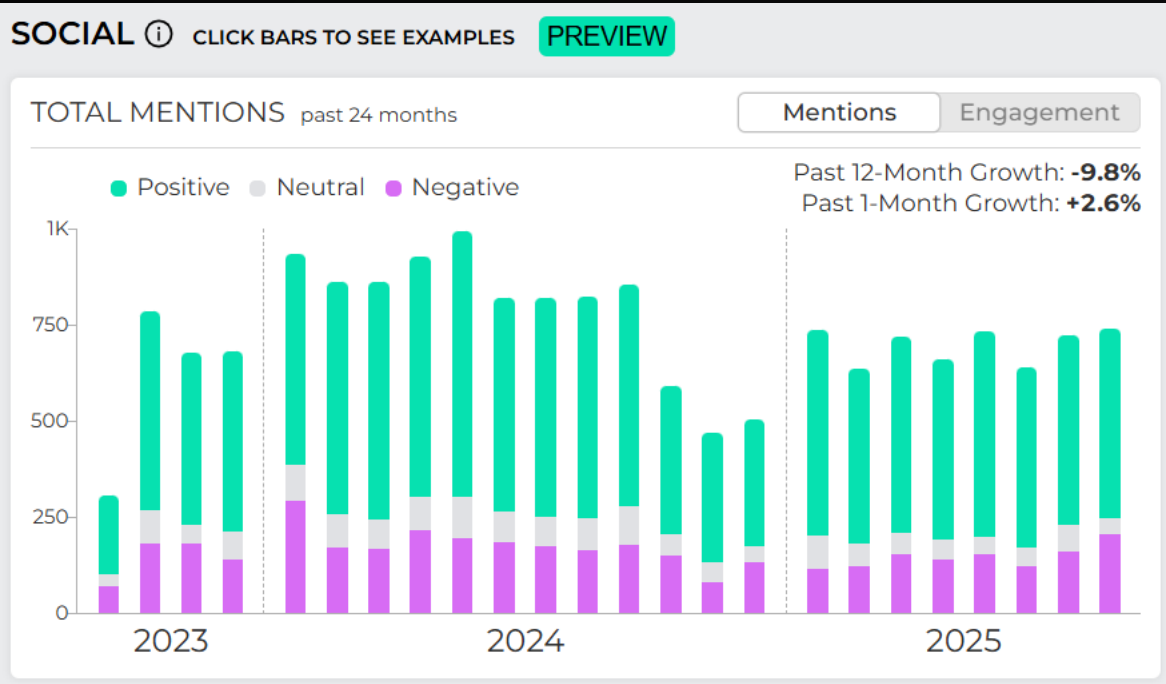
GROWTH POTENTIAL:
ABOVE AVERAGE

BURNT ENDS ranks in the 70th percentile for future growth potential - Its growth is predicted to outperform 70% of all other foods, beverages, and ingredients over the next four years.

Powered by Menucast™
Datassential's AI-based prediction engine



BURNT ENDS



BURNT ENDS



7784
35
1791
2168

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corysbackyardbbq • Follow
Big Pun • Still Not a Player (Remix) (Instr...



corysbackyardbbq • Edited • 1w
Black Cherry Chipotle Hotdog Burnt Ends 🔥

Sweet. Smoky. Spicy. These bites don't play fair, they just WIN!

How many are you taking down???

👉 RECIPE BELOW 👈

1 Score a pack of Kosher Beef Hotdogs, cover in mustard and this seasoning mixture:

- 👉 1 tbsp Smoked Paprika
- 👉 1 tbsp Garlic Powder
- 👉 1/2 tsp Salt
- 👉 1/4 tsp Black Pepper

2 Smoke at 350f for about 20 minutes

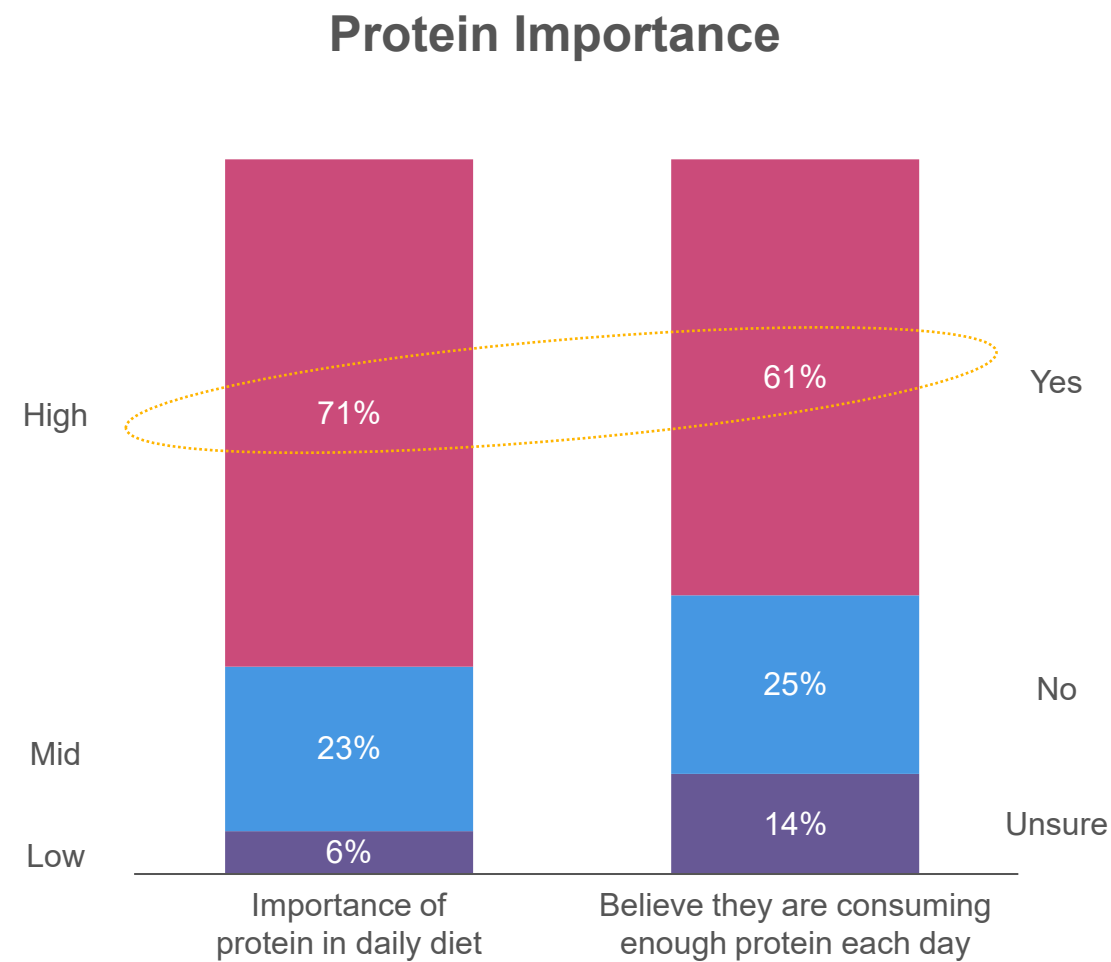


128 likes

September 7



In protein, there is a gap and work to be done

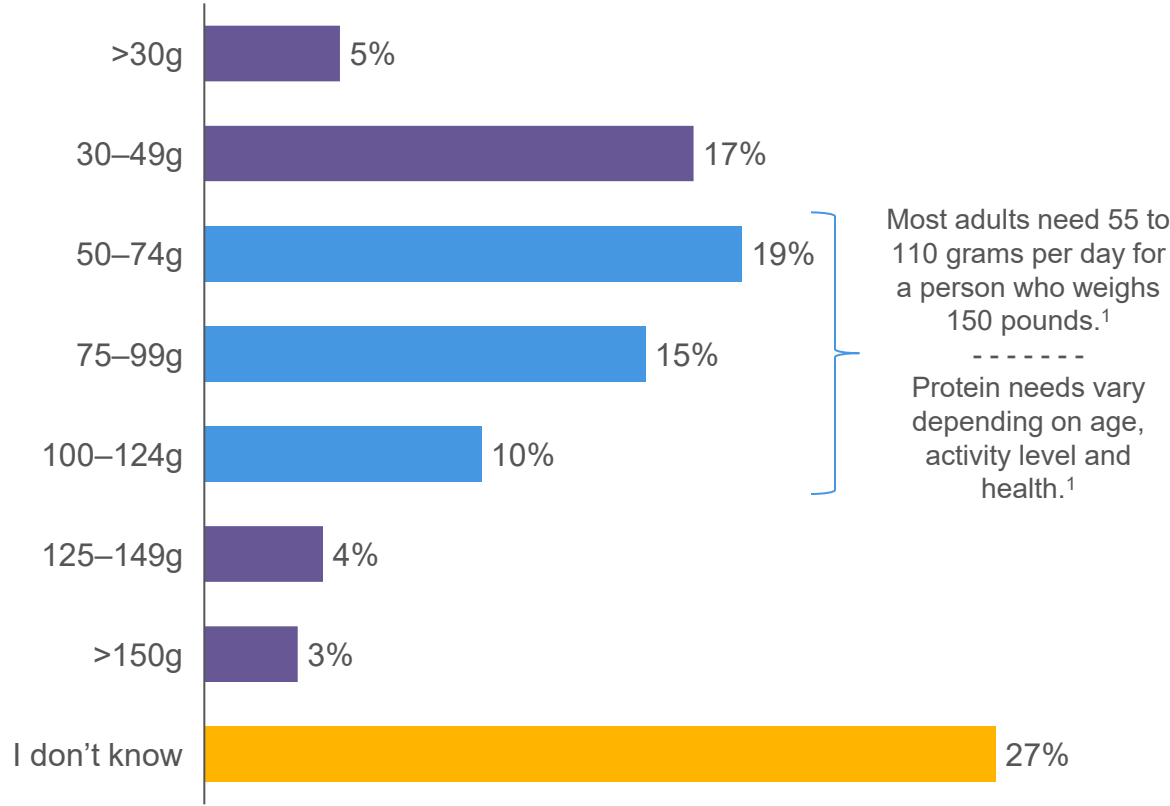


Source: NIQ, BASES Quick Question Protein Across The Store Survey, August 2025, n=1,020



Many struggle with daily protein requirements

Grams of Protein the Average Consumer thinks they need to consume each day

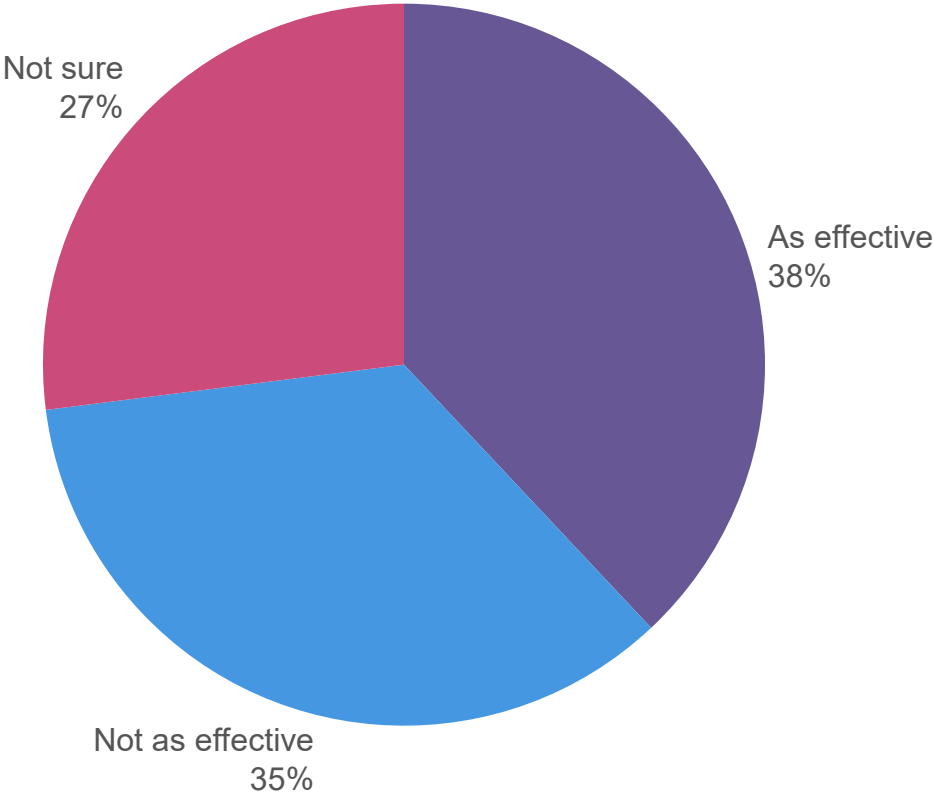


Source: NIQ, BASES Quick Question Protein Across The Store Survey, August 2025, n=1,020; ¹UCLA Health. (2025, September 9). *How much protein do you really need?* Retrieved from <https://www.uclahealth.org/news/article/how-much-protein-do-you-really-need>



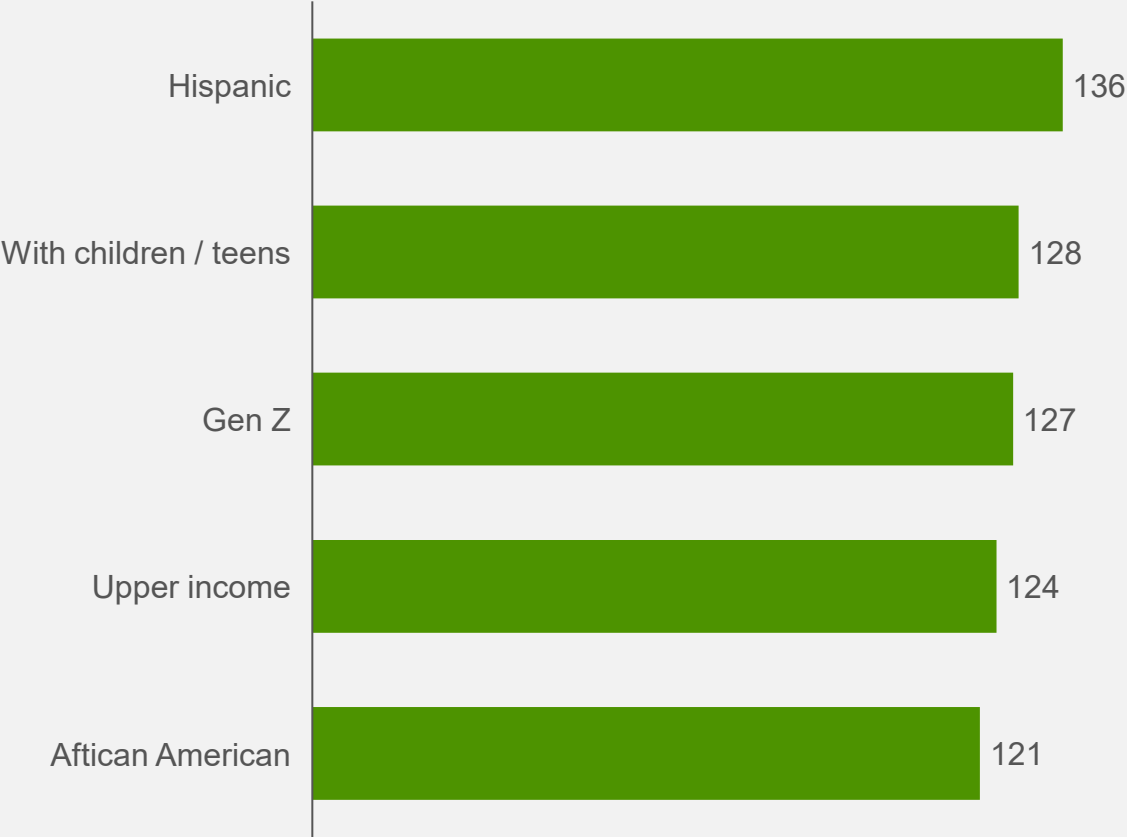
The jury is out on protein effectiveness...

Effectiveness of Plant-Based Proteins Compared to Animal-Based Proteins



...but for some, sources are at parity

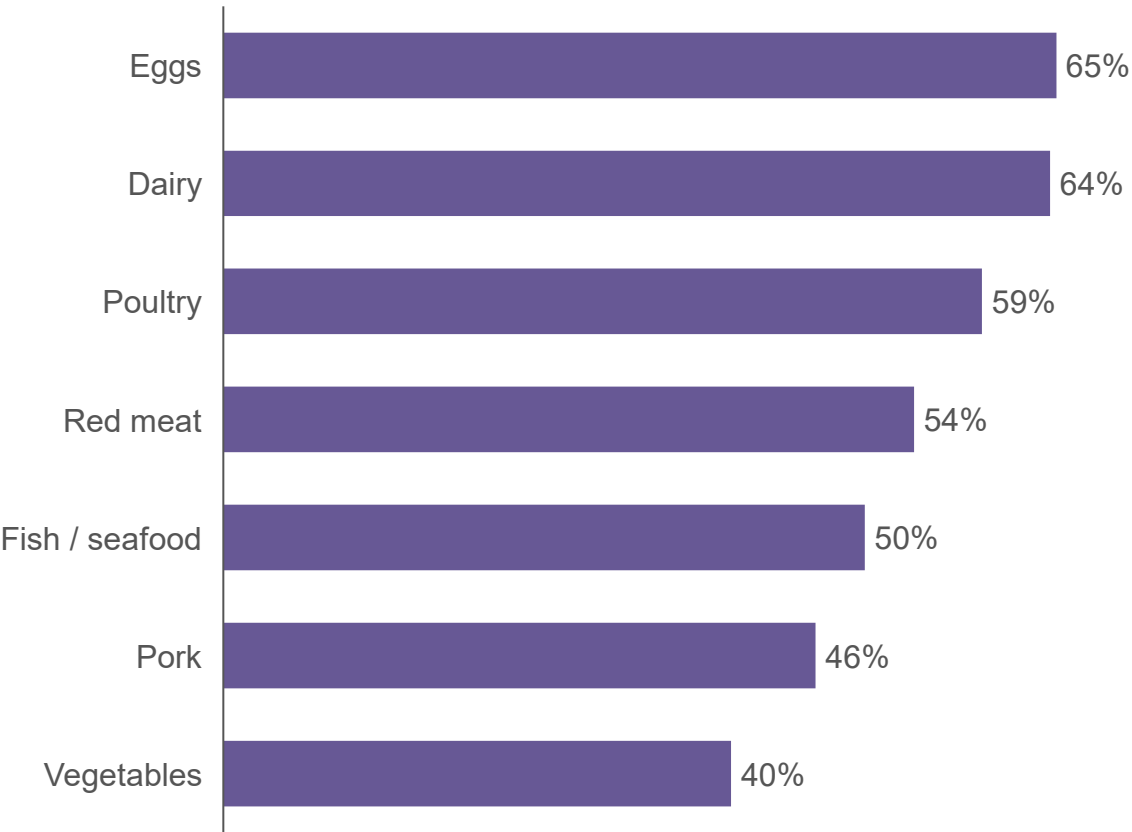
Cohorts that Perceive Plant-Based and Animal-Based Proteins at Parity



Source: NIQ, BASES Quick Question Protein Across The Store Survey, August 2025, n=1,020

Eggs are the #1 source for protein

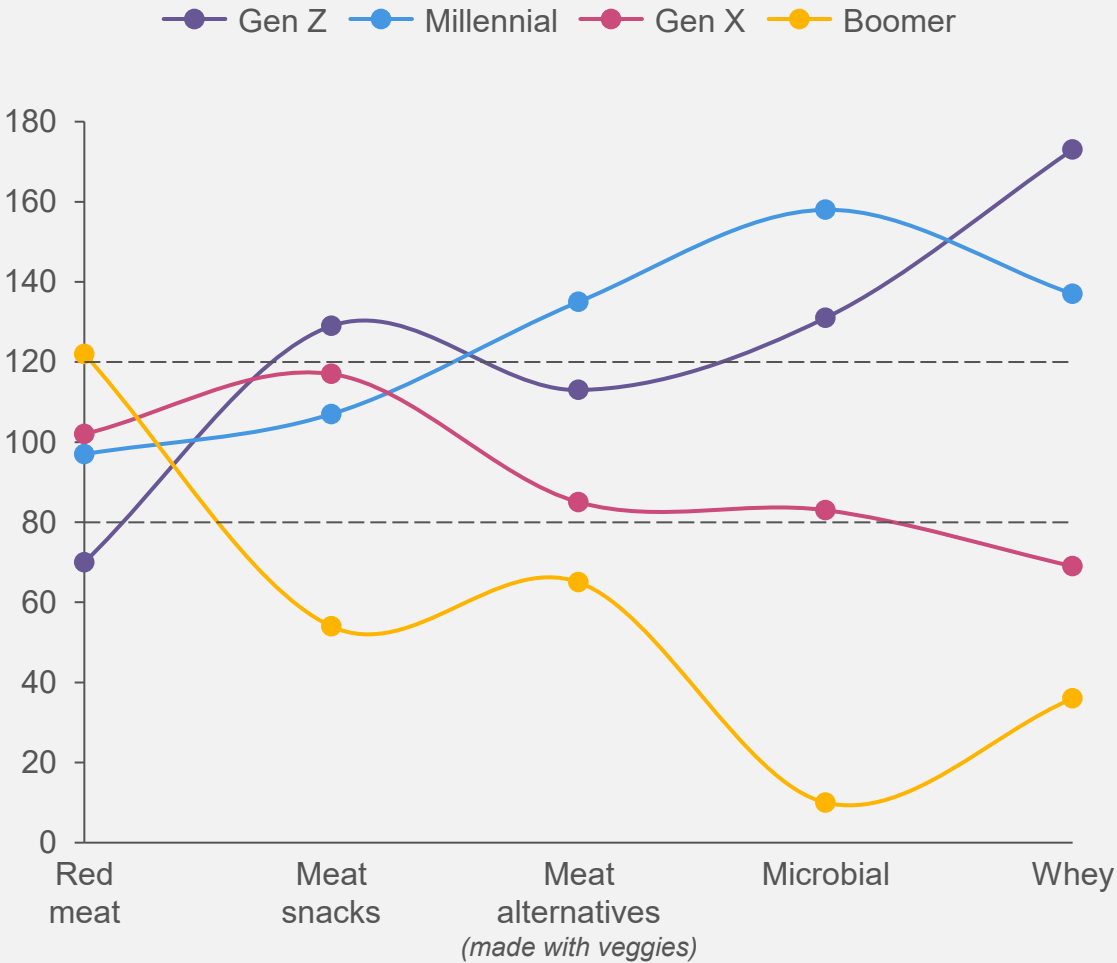
Most Frequently Consumed Sources of Protein



Source: NIQ, BASES Quick Question Omnibus Survey, August 2025, n=1,020

Younger consumers crave healthier protein

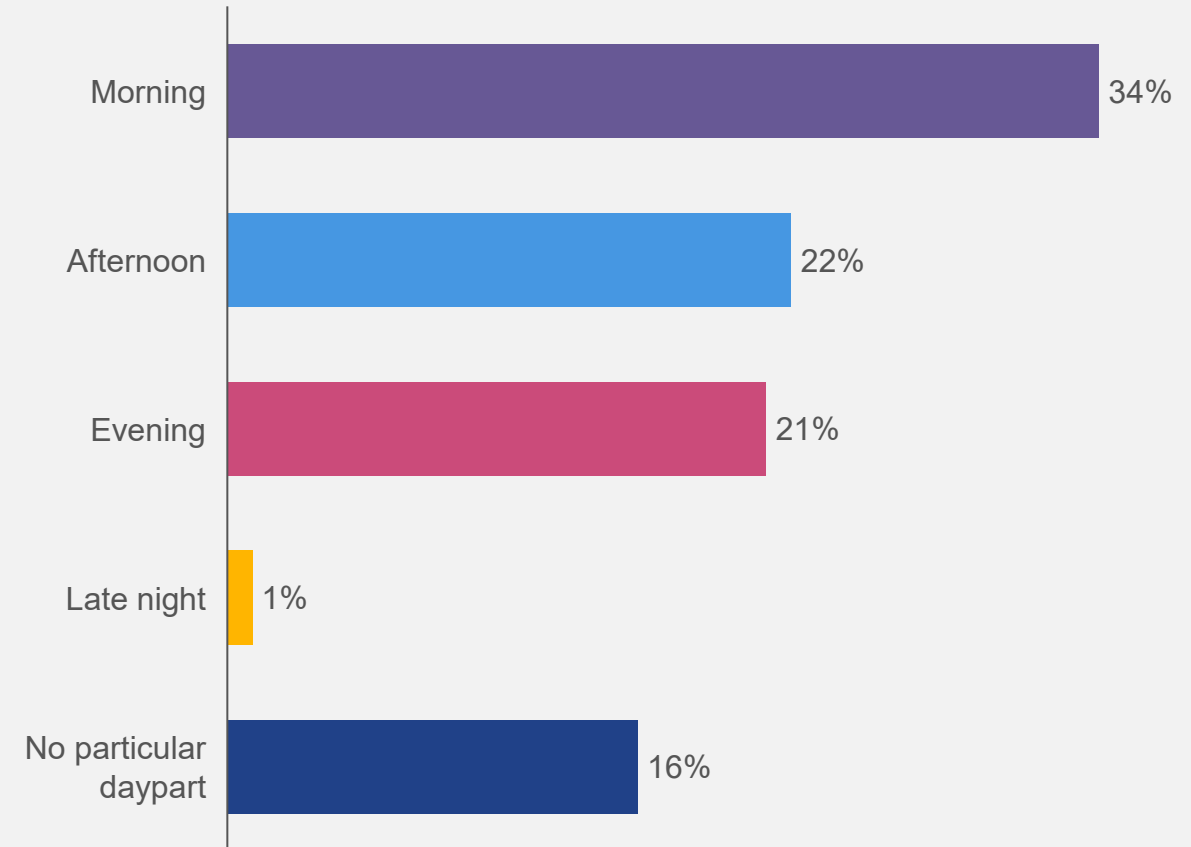
Priority Protein Types
By Generation



54% are
*actively
trying*
to have more protein
at breakfast

Protein is top of mind at breakfast

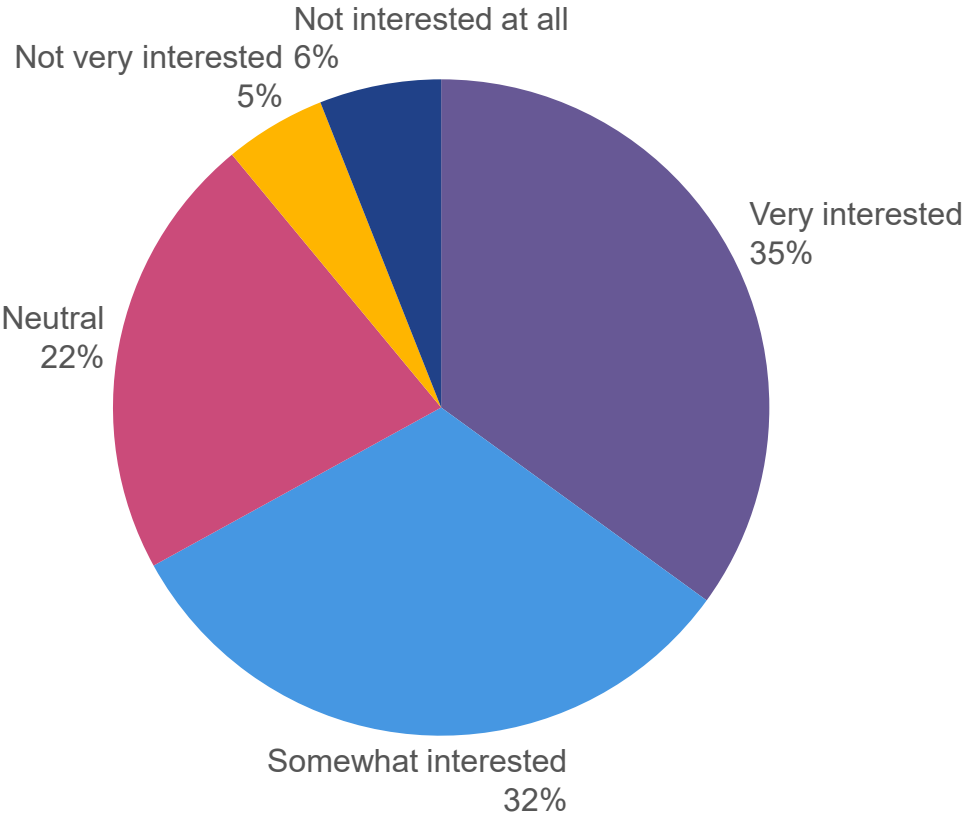
Time of Day When Most Focused on Consuming More Protein



Left Source: NIQ, BASES Quick Question Omnibus Survey, July 2025, n=1,020
Right Source: NIQ, BASES Quick Question Omnibus Survey, August 2025, n=1,020

It's not all about eggs, yogurt, & bacon

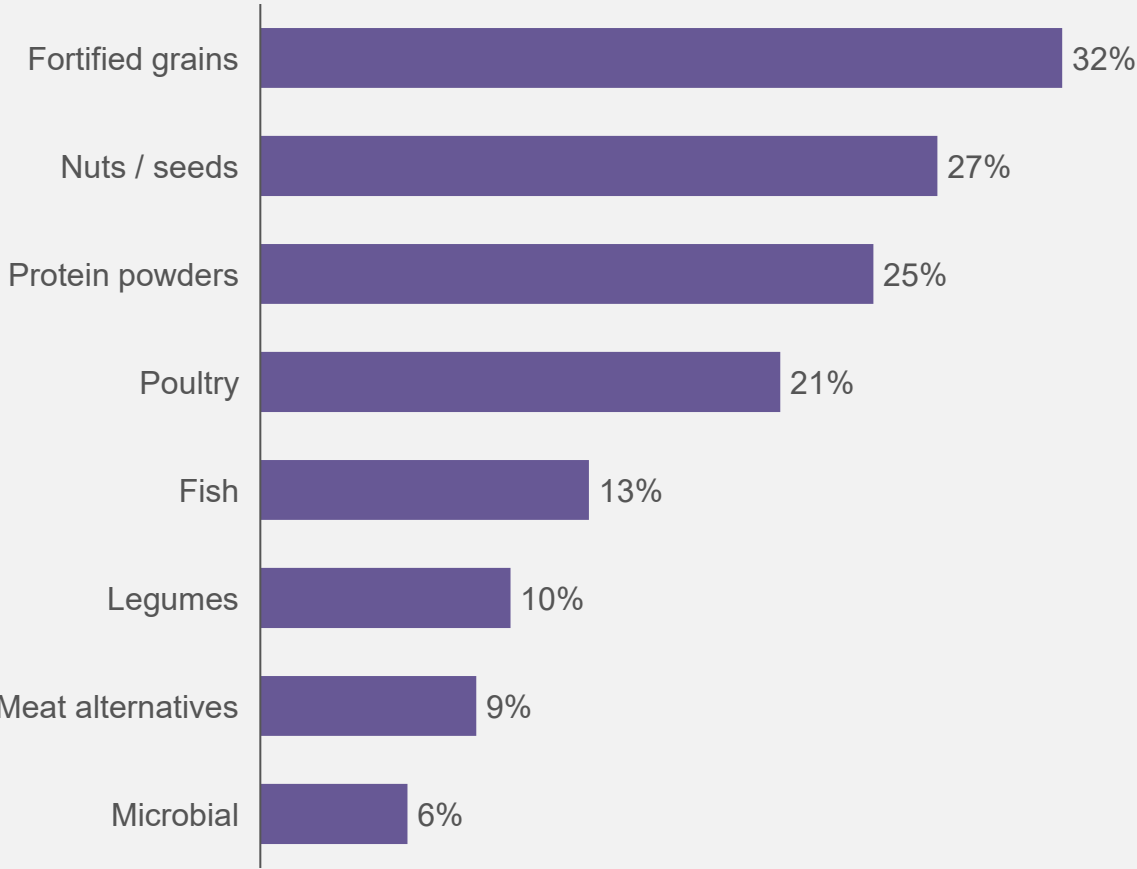
Interest in Having More Healthy Protein at Breakfast
(Poultry, Seafood, Plant-Based, Fortified Grain, Microbial, etc.)



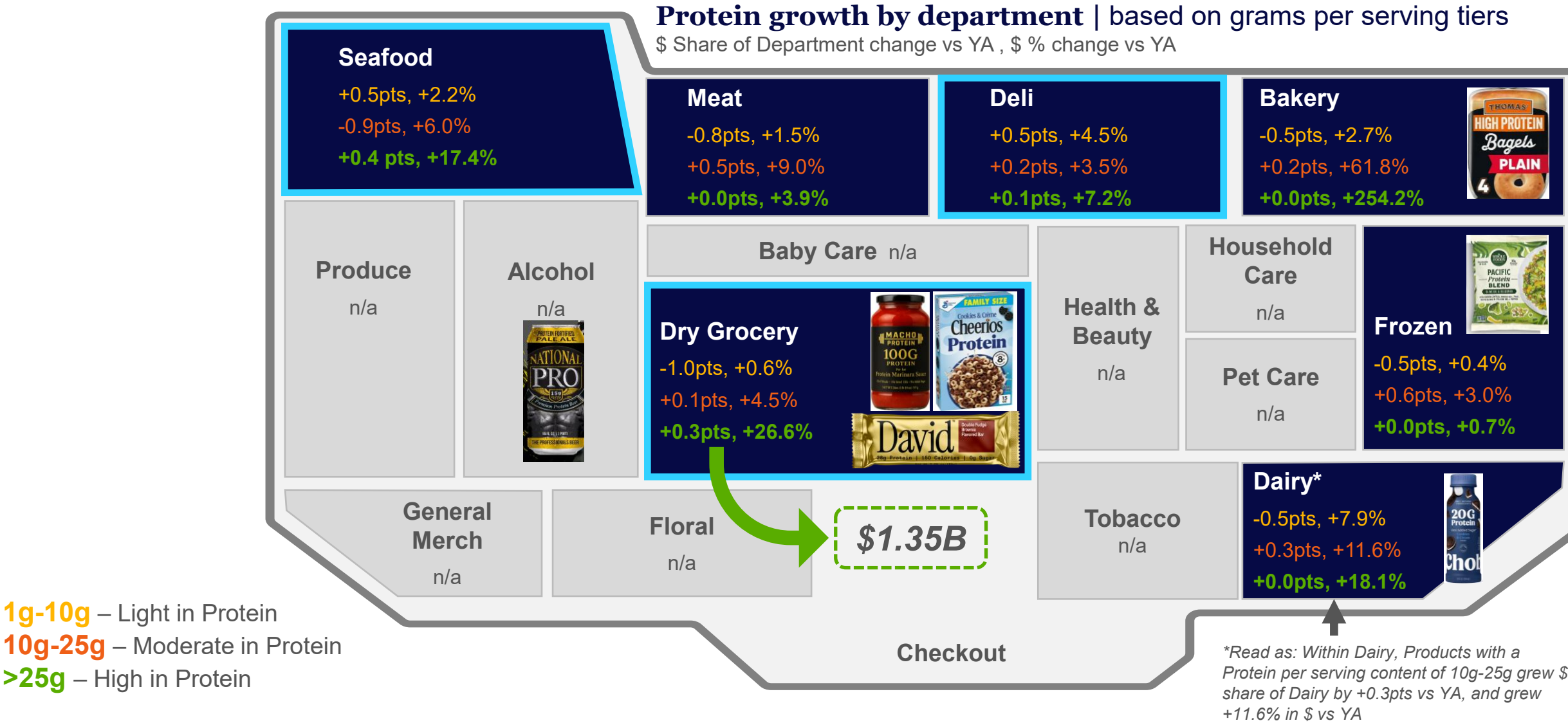
Source: NIQ, BASES Quick Question Omnibus Survey, July 2025, n=1,020

Other proteins have a breakfast opportunity

Most-Desired Sources of Healthier Protein at Breakfast



Protein is expanding rapidly outside of inherently high-protein categories



Source: Full View Measure Total Store Syndicated Data, Full View incl Amazon, Costco, Convenience, Military OCONUS | Latest 52 weeks w/e 07/12/25

Sustainability attributes growing in Meat

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Environmental Sustainability				Fresh Chicken
	Family Farmed	+8.3%	+9.1%	Fully Cooked Chicken
				Fully Cooked Turkey
	Sustainability certified	+6.9%	+2.2%	Fresh Beef
	Regenerative Agriculture	+41.9%	+29.0%	Fresh Beef
				Processed Dinner Sausage
Social Responsibility	Ethical	+43.8%	+20.6%	Fresh Beef
	Responsibly Sourced	+40.3%	+37.5%	Fresh Beef

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Animal Welfare				Fresh Chicken
				Fresh Beef
	Vegetarian fed	+15.3%	+20.7%	Fresh Bison
				Fresh Pork
				Processed Breakfast Sausage
	Cage Free	+17.0%	+18.8%	Fresh Chicken
				Processed Bacon
	Free Range	+8.4%	+7.1%	Fresh Chicken
				Fresh Beef
				Fresh Turkey
				Fresh Fowl & Exotics
	100% Grass Fed	+57.1%	+46.3%	Fresh Beef
				Fresh Lamb
				Processed Frankfurter
				Processed Dinner Sausage
	Certified Humane Raised & Handled	+16.3%	+15.3%	Fresh Beef
				Fresh Pork
				Processed Bacon
				Fully Cooked Pork

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US xAOC ; Meat department, NPI ESG Sustainability stated attributes; \$ and Units % change vs year ago; 52 weeks ending September 6, 2025

Sustainability attributes growing in Meat

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Clean Label	Free from Hormones	+10.5%	+7.3%	Fresh Beef Fresh Lamb Ham Smoked Picnics
	Free from Antibiotics	+12.8%	+10.4%	Fresh Chicken Fresh Beef Fresh Lamb
	Free from Filler	+2.9%	-1.0%	Processed Dinner Sausage
	Non-GMO	+11.1%	+7.4%	Fresh Chicken Fresh Beef Fresh Turkey

	Sustainability claims	\$ % CYA	Units % CYA	Top growing Categories
Organic / Better For™	Better For™	+11.3%	+8.5%	Fresh Chicken Fresh Beef Fresh Pork Fully Cooked Beef
	Organic	+25.5%	+24.2%	Fresh Chicken Fresh Beef Fresh Lamb Processed Breakfast Sausage

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US xAOC ; Meat department, NPI Clean Label, Organic stated attributes, NIQ Better For™; \$, Units % change vs year ago; 52 weeks ending September 6, 2025

The future is fresh

Important to watch total food trends



The interconnection between in-home and out of home will continue to be important to watch as consumer confidence shifts this year

Fresh leads in consumer priorities



Produce and protein continue to be important for consumers and continue to offer flavors, attributes (including sustainability and wellness), and product types

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Thank you

