

March 31, 2026

“Memorial Day reminds us that food is still one of the most powerful ways people connect with each other. Shoppers are prioritizing connection and celebration, and they’re rewarding retailers and manufacturers that make those moments easier to execute. Retailers and manufacturers that make it easier to gather, share, and celebrate will earn far more than a single weekend—they’ll earn relevance for the entire season.”



Chris Costagli

Vice President,
Thought Leadership
F&B Insights Lead,
NielsenIQ

Did you know...

- African American Households are **1.4x more likely** to use pre-seasoned options for grilling—particularly spice mixes and hot sauces—highlighting higher engagement with bold, layered flavors?⁴
- Households with kids under 12 are **1.3x more likely** to say preparation and cooking time is the most stressful part of Memorial Day planning?¹
- Households with more than four people **are 1.2x more likely** to plan their Memorial Day shopping in advance—reinforcing that scale drives intentionality, not urgency?¹

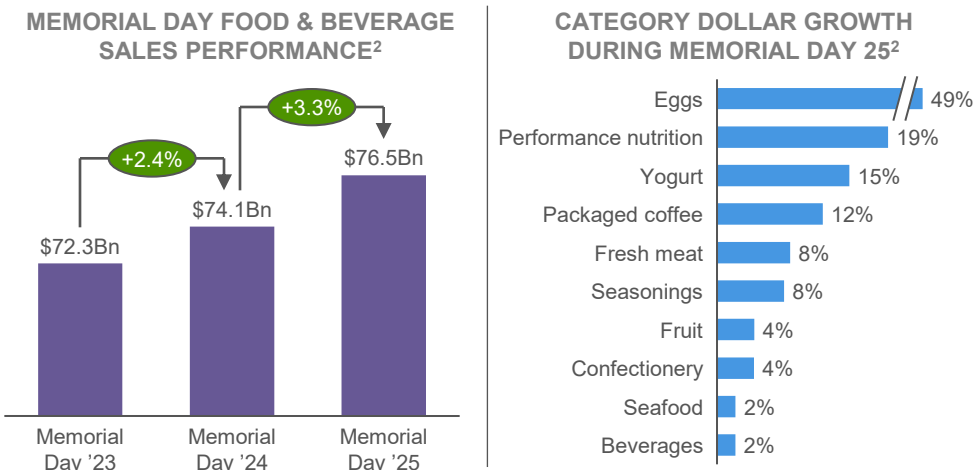


The Weekend That Sets The Season

Implications for the Food Industry

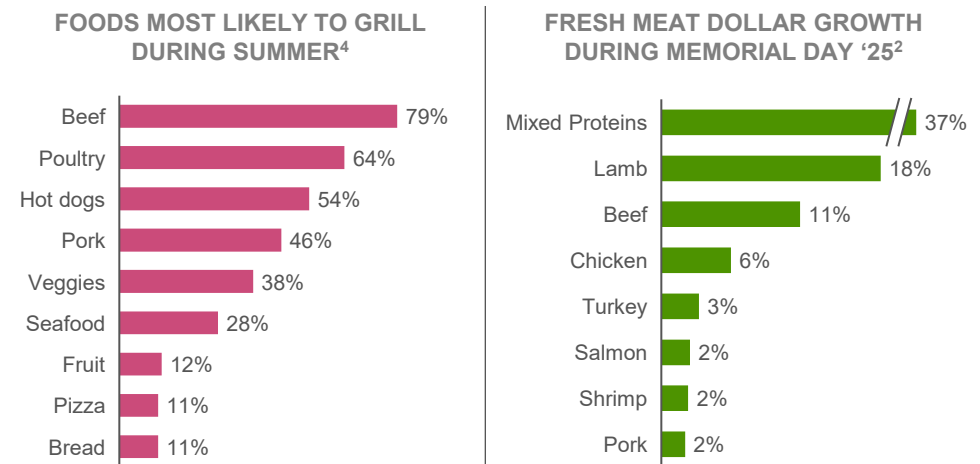
Memorial Day is summer’s unofficial kick-off

With food & beverage sales topping \$76.5B in 2025 (+3.3% YoY), Memorial Day has become a leading indicator for summer demand. The categories that outperform during this moment reflect how consumers are structuring eating and hosting behaviors across the season. As outdoor gatherings scale, these categories will anchor summer baskets, shaping volume and mix well beyond the holiday itself.



Meat is the occasion anchor

Despite rising interest in meatless eating—19% report preparing more meatless meals—fresh meat remains the gravitational center of Memorial Day. As grilling season begins, protein will anchor the occasion, even as shoppers navigate inflation and elevated prices. Expect more deliberate trade-offs: heightened deal-seeking, increased openness to alternative cuts, and greater reliance on channels where value feels tangible and justified.



Industry Analysis Sources: ¹NIQ, BASES Quick Question Omnibus Survey, n=2,024, March 2026; ²NIQ, Retail Measurement Services, Total Full View, Total Food & Beverage, Memorial Day 2025 4-Weeks Ending 5/31/2025 ³NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, Total Food & Beverage, 4 Wks Ending 5/31/2025; ⁴NIQ, BASES Quick Question Omnibus Survey, n=1,005, April 2025

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The takeaway...

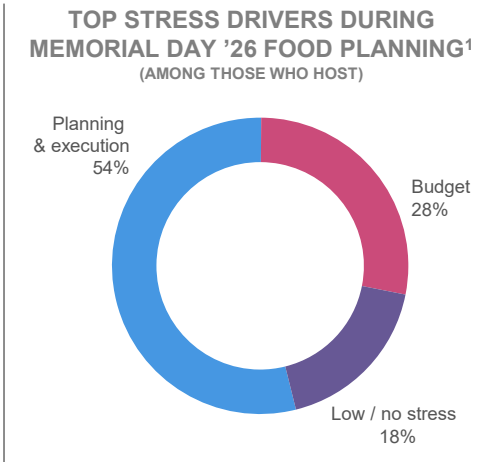
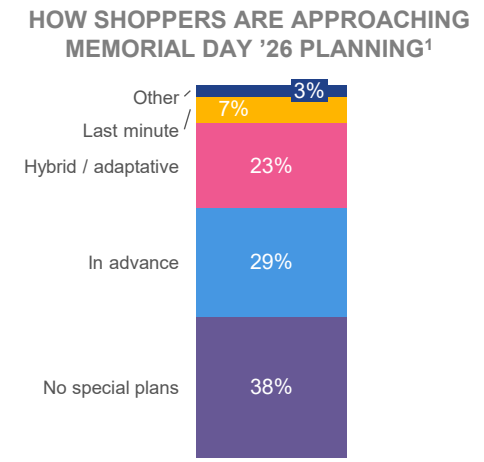
- The problem is not related to demand; the problem is execution. Shoppers are ready to spend, but friction is suppressing growth.
- Channel share is moving because trust is moving. Club and online retailers are winning fresh meat and seafood sales by making value feel certain, not just cheaper.
- Confidence defines grilling, not effort. Consumers want authenticity, but they expect the industry to remove the guesswork.

Your next move...

- Build Memorial Day “done-for-you” protein missions—pre-bundled meat, seasoning, and sides with clear guidance—so shoppers can complete the basket in one decision, not five.
- Re-align channel strategy around planning behavior by tailoring pack sizes, assortments, and pricing architecture to formats where shoppers are building intentional protein baskets.
- Win with assisted-DIY innovation—flavor-forward products that feel customizable and authentic but deliver consistent results with minimal effort.

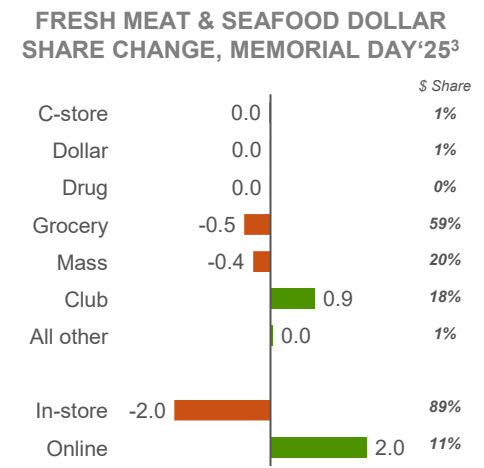
Memorial Day highlights the execution bottleneck

Memorial Day planning patterns reveal a consumer who is willing to spend but is intolerant of friction. With only 7% relying on last-minute shopping and stress concentrated around execution rather than budget, the constraint on growth is less about affordability and more about delivery. Retailers and manufacturers that remove complexity, compress decision-making, and make hosting feel manageable rather than overwhelming will win this season.



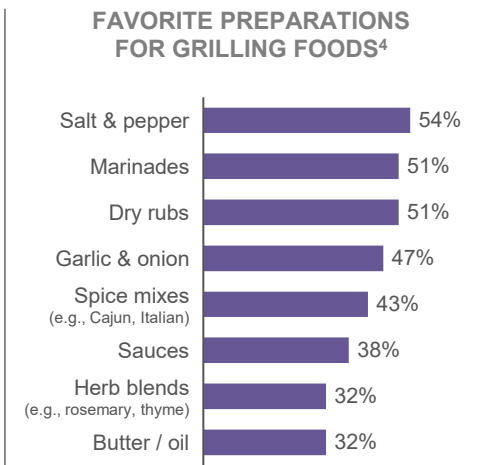
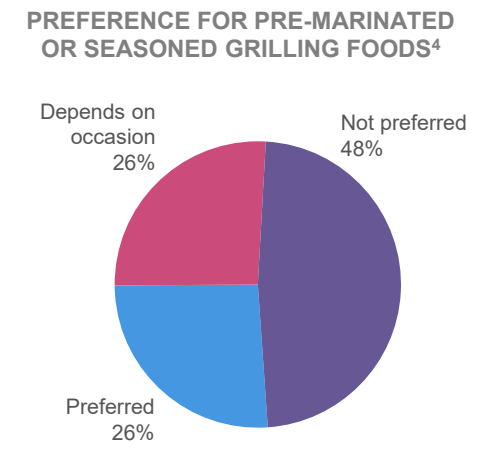
Value and quality are reshaping channels

Memorial Day continues to expose a reallocation of fresh meat and seafood, favoring club and online channels as traditional grocery loses share. Club’s price-per-ounce advantage and quality perception are reshaping value expectations, while online penetration climbed +35%, with larger, more deliberate protein baskets (+8% units per occasion). These shifts signal a consumer moving away from channels that fail to demonstrate clear value.



Grilling is about confidence

Shoppers want to feel like capable hosts and confident grillers—but they are unwilling to do unnecessary work to get there. The real opportunity isn’t forcing a choice between scratch cooking and convenience; it’s designing solutions that preserve authenticity while removing friction. Brands that confuse effort with engagement will lose relevance, while those that enable flavor confidence, speed, and customization will shape how grilling evolves.



Looking for more?

This Memorial Day signals a summer defined by intentional demand rather than spontaneous spend. Shoppers are planning earlier, building larger protein-led baskets, and gravitating toward channels that reinforce confidence in value and execution. Retailers and manufacturers should expect continued share gains for club and online formats that support stock-up missions, alongside mounting pressure on models that rely on last-minute conversion. Winning the summer season will depend less on promotional intensity and more on system design—how well products, channels, and solutions work together to simplify the occasion.