Circana Deep Dive: Q2 2026

IDDBA Member exclusive access!

View recording and download slide deck at iddba.org. (Available in 24-48 hours)

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2026 Deep Dive Webinar Series:

- April 30th – Thank you for joining today!
- July 30th
- 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

Circana solutions utilized in this Webinar

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

MULO+

The largest census-based POS coverage of CPG core channels.

Integrated Fresh Scan Panel

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

CREST®

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

Health & Wellness Solutions

Multiple solutions around health & wellness to answer your business questions including Healthy Shopper segmentations & Premium Health & Wellness attributes for POS & Panel

NET HABTS

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.

Interested in insights from this session?
CLICK HERE or

Including a discount for IDDBA members new to Circana

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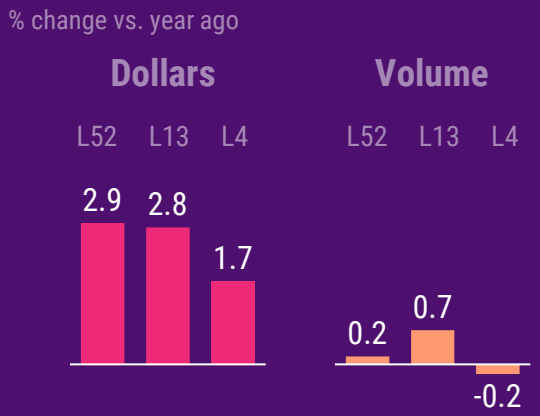
Data ending March 22, 2026

U.S. Consumer Total Wallet

Consumer sentiment fell[1] in March following modest gains in prior months, driven by heightened concern over military conflict in Iran and potential inflation impacts, particularly gas prices, which climbed to $4.13 per gallon by late March[2]. Higher tax refunds may provide near-term relief, with the average refund 11% higher than at the same point last year[3].

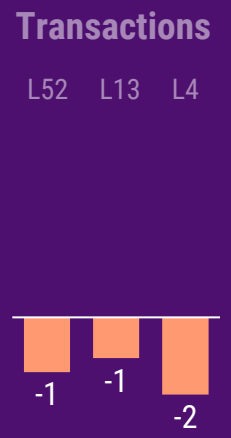
Retail Food & Beverage

Retail F&B volumes hold as essentials are prioritized



Restaurants[4]

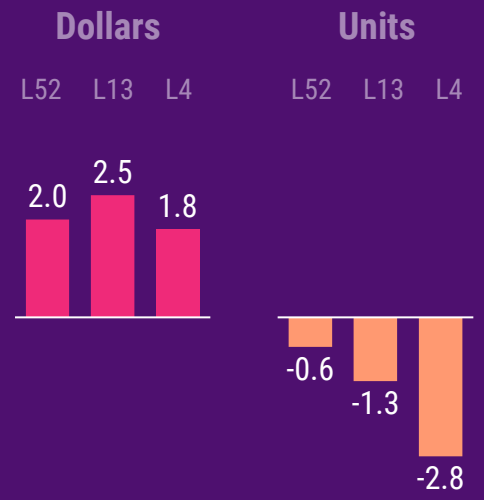
Restaurant transactions remain soft in early 2026



Non-Food CPG

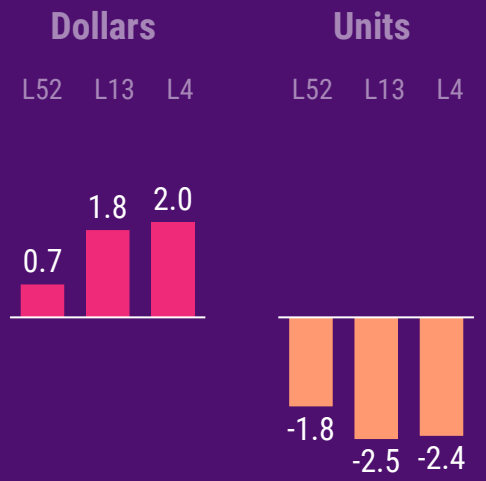
excluding Tobacco

Ongoing non-food CPG unit declines reflect more intentional consumer spending



General Merchandise

General merchandise sees some dollar momentum from new releases and promotions (e.g., video games, toys)



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Source: Circana, LLC POS data ending March 22, 2026 (March 21 for General Merchandise), Circana, LLC, Executive CPG & Foodservice Advisory.
1. University of Michigan Survey of Consumers, 2. US Energy Information Administration, Weekly U.S. All Grades All Formulations Retail Gasoline Prices , 3. IRS, 4. Circana, LLC CREST Performance Alerts (Large Chain Restaurants Only)

Today's shoppers are facing compounded financial and emotional stress, with little capacity to absorb new pressures

Compounding Pressures

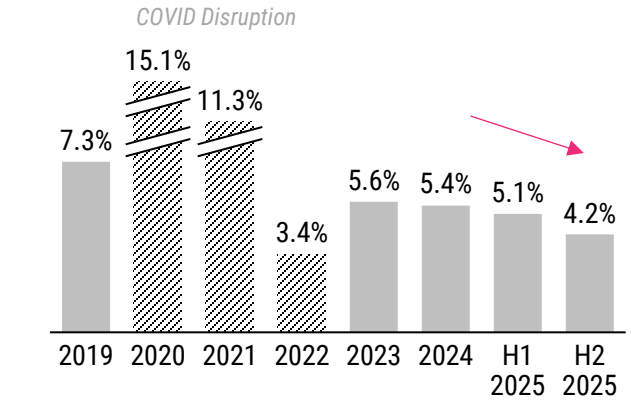
NEW PRESSURES BUILDING IN 2025-2026

Gas prices rising	+$1.12/gallon vs. Feb
Government benefits tightening	Tighter SNAP eligibility and restricted items
Student loan collections resumed	Collections resumed on federal loans in default in May 2025
Job insecurity growing	Fear of job loss +5ppt Feb 2026 vs. Feb 2024
Consumer confidence near historic lows	March '26 sentiment near record lows

BASELINE PRESSURES STILL BEING FELT

Compounding inflation and rising cost of living;
High credit card debt and delinquency rates

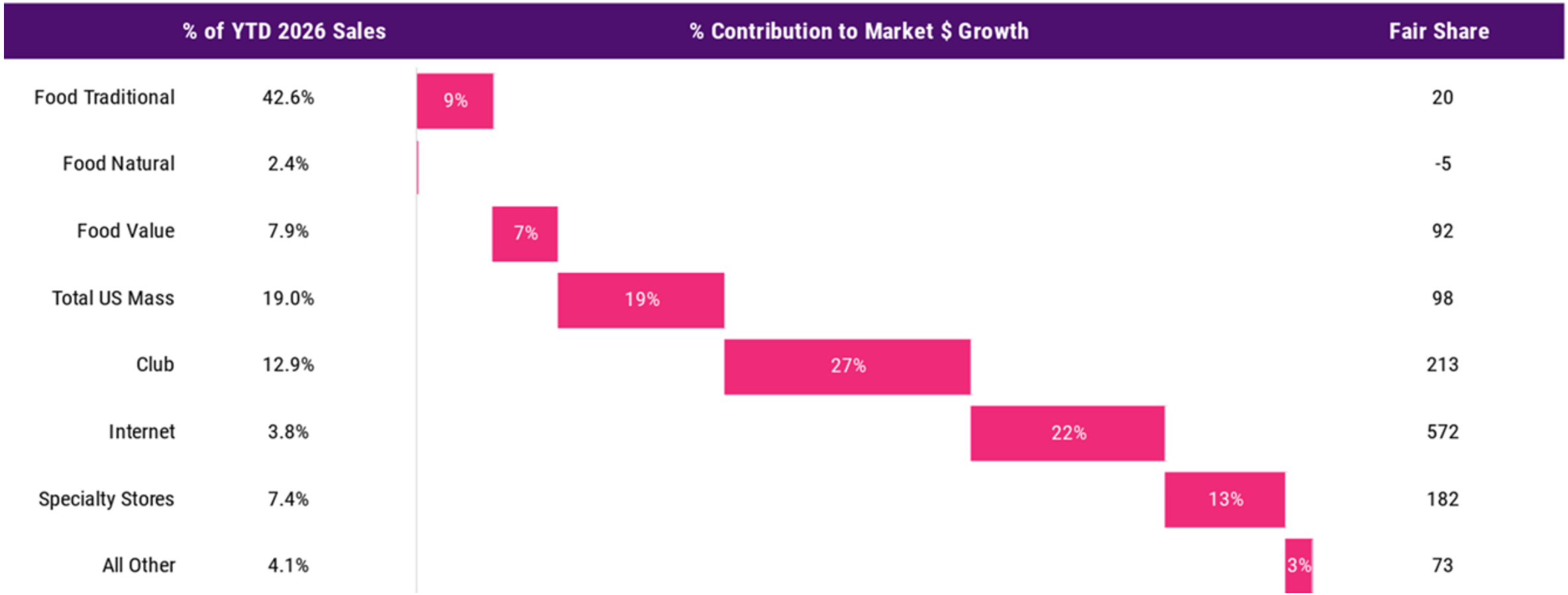
Personal Savings Rate declined steadily throughout 2025



Source: Personal Savings Rate: FRED Federal Reserve Bank of St. Louis, Seasonally Adjusted Annual Rate, Average of Monthly Results, Job Insecurity: UMich Consumer Sentiment Probability of Losing Job within Next 5 Years, Gas Prices: US EIA, Week of 3/30/26 vs. 2/2/26, All Grades, Circana Executive CPG & Foodservice Advisory.

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Where We Buy Fresh Foods Has Changed- Traditional Food/ Grocery Not Gaining its Fair Share while Club, Internet & Specialty Stores are accelerating

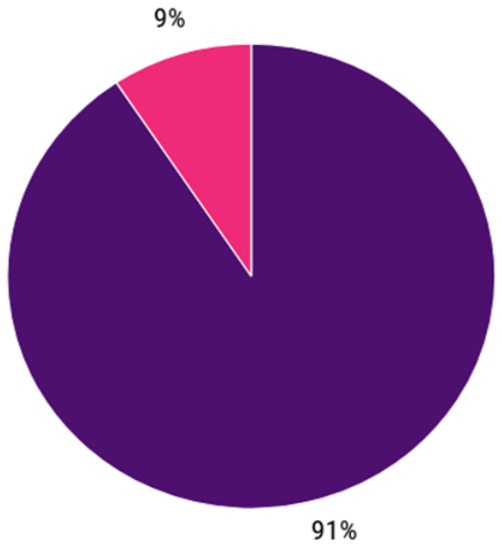


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Source: OmniConsumer Integrated Fresh Year To Date 2026, data ending 3/22/2026, All Outlets.

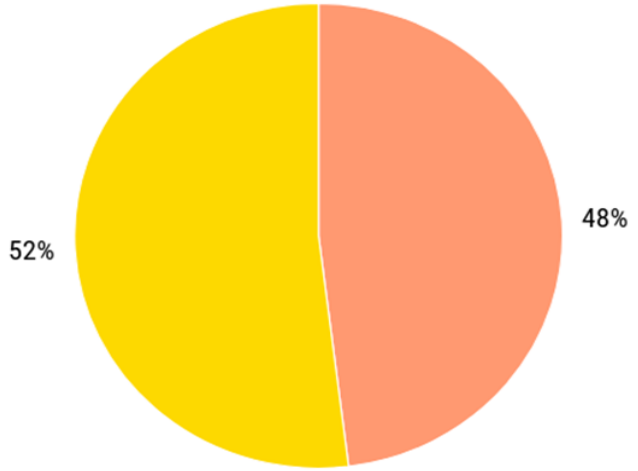
Total Fresh Foods we see growth is overall driven by **E-Commerce sales** within Total US MULO+

Dollar Sales and Growth for PERISHABLES in the Rolling 52 Weeks Ending 03-22-26

Share of Omnichannel



Share of Omnichannel Growth



Total US - Multi Outlet+ Brick & Mortar

Total US - Multi Outlet+ Ecommerce

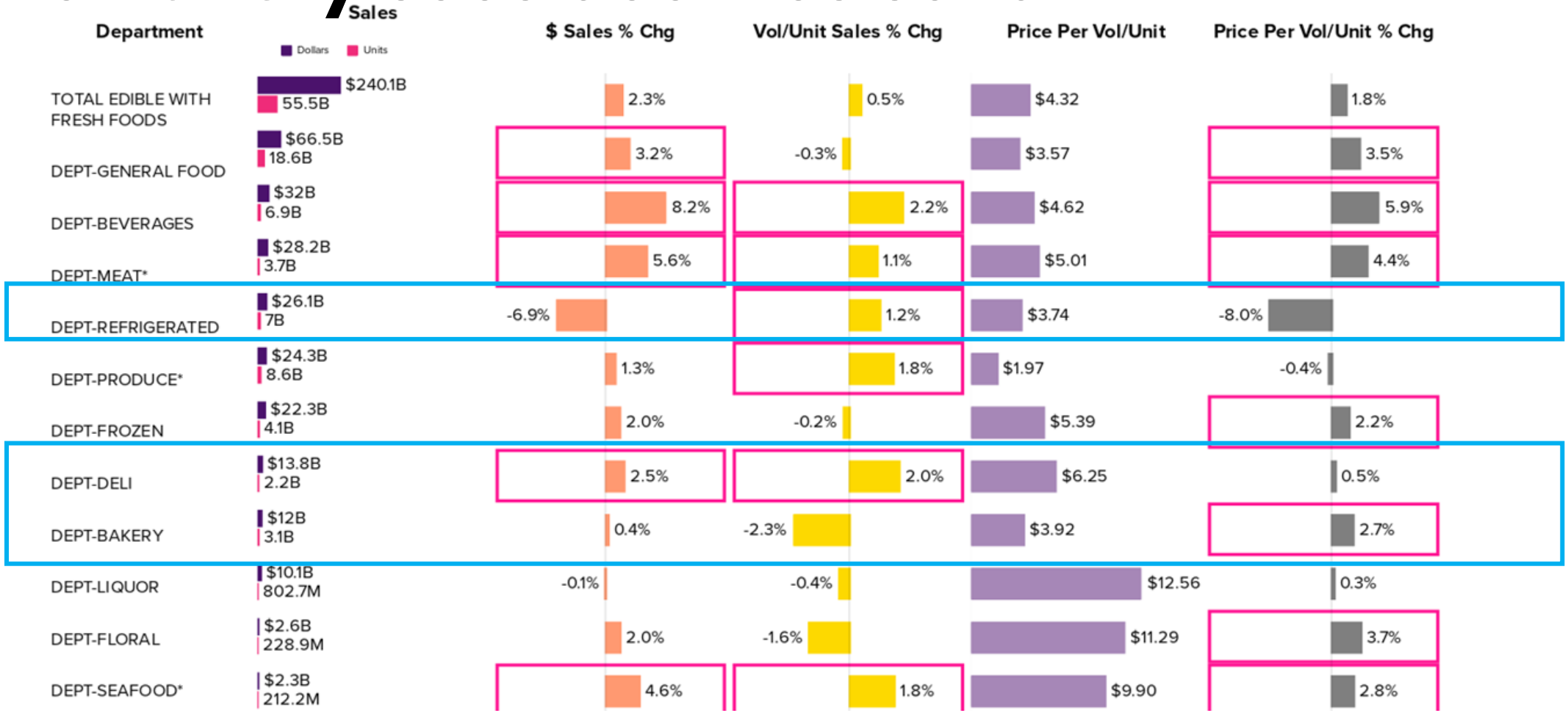
Total US - Multi Outlet+ Brick & Mortar

Total US - Multi Outlet+ Ecommerce

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Source: OmniConsumer Integrated Fresh Year To Date 2025, data ending 3/22/2026, All Outlets.

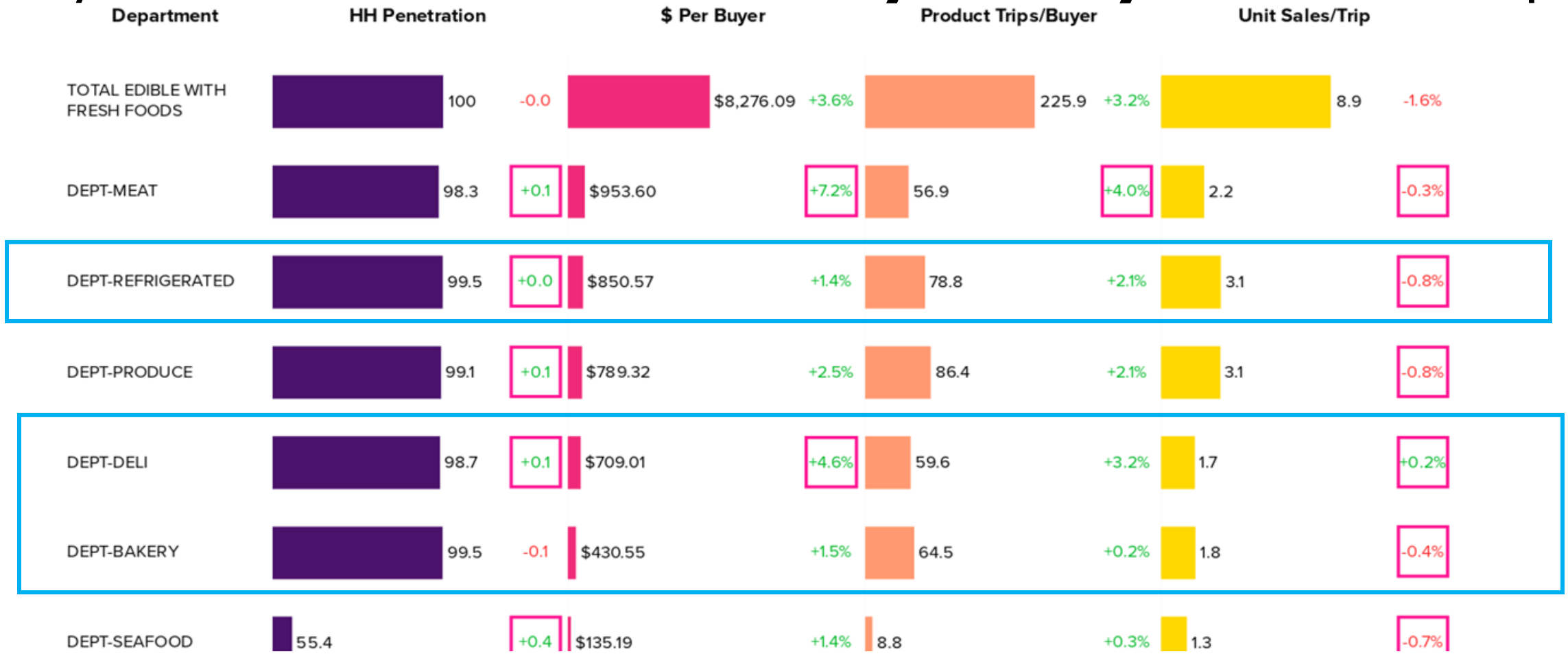
Dairy & Deli outpaces total edible unit growth, while **Bakery** sees declines so far in 2026



*Vol/LBs
Exceeding TOTAL EDIBLE Trends highlighted

Circana, Inc. and Circana Group, L.P. | For public use
Source: Circana Integrated Fresh, Total US MULO+, Year to Date weeks ending 03/29/2026

Dairy, Deli & Bakery see growth in dollars & trips per buyer so far in 2026, but **Bakery & Dairy** lose units/trip



Exceeding TOTAL EDIBLE Trends highlighted

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Source: Circana Integrated Fresh Panel, Total US All Outlets, Latest 52 Weeks Ending 03/22/2026

Fresh Foods Top 15 Categories by Absolute Dollar Change

Deli Entrees are in the top 3 for the first time in years – fueled by continuing expansion into more cuisines, more product formats and more distribution points.

Both Specialty Cheese and Grab & Go Deli Meat have grown through package and size – right occasion and right price point, especially in snackable and resealable ways.



Beef

$1.0B	3.2%



Chicken

$208.0M	0.7%



Deli Entrees*

$131.9M	4.6%



Fresh Berries

$114.7M	2.9%



Fresh Finfish

$93.2M	2.8%



Deli Specialty Cheese

$83.7M	4.6%



Fresh Grapes

$78.6M	5.0%



Fresh Sweet Potatoes/Yams

$59.2M	29.4%



Rfg Juices/Drinks

$58.0M	-2.0%



Turkey

$56.0M	-6.8%



Deli Grab & Go Lunchmeat

$55.9M	9.8%



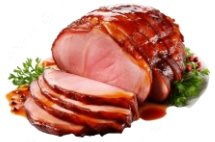
Dinner Sausage

$50.7M	1.2%



Fresh Melons

$49.1M	6.2%



Smoked Ham

$48.8M	26.5%



Fresh Lettuce

$46.9M	-2.8%

Abs $ Sales Change vs YA

Volume* or Unit % Chg vs YA

Source: Circana Integrated Fresh, Total US MULO+, Year to date 2026 ending 03/29/2026

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

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Glossary to all Department definitions

[Link to glossary here]







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Deli Department

Each retailer has a unique assortment and definition of what they consider “deli”; Circana / IDDBA view is:



Deli Meat

- Pre-Sliced (UPC)
- Service (Clerk-Serve)
- Grab & Go (RW, Pre-Pack)

Excludes: Meat Dept Packaged Lunchmeat



Deli Cheese

- Pre-Sliced (UPC)
- Service (Clerk-Serve)
- Grab & Go (RW, Pre-Pack)
- Specialty (all other)

Excludes: Dairy Cheese



Deli Prepared Foods

- AKA “Retail Food Service” – Ready to Cook or Eat meals, hot or cold, RW or UPC
- Deli Entertaining
- Deli Prepared Meals

Excludes: Refrigerated Meals in Dairy/Meat

Source: Circana Integrated Fresh 2025.



Specialty Cheese



Pre-Sliced Cheese



Grab & Go Cheese



Dairy Cheese

NOT IN DELI

Source: Circana Integrated Fresh 2025.

Lunchmeat isn't one department fits all



Source: Circana Integrated Fresh 2025.

Deli

Deli Entertaining – items that tend to be bought for entertaining and snacking rather than for meals. Most are meant to be served cold.



Dips/Sauces

dips and salsas that are refrigerated



Trays

Premade trays either done by the deli at the or UPC trays, meat and cheese but also can be sandwich trays



Spreads

predominantly hummus. Items that aren't dips or condiments – spreads that are refrigerated



RFG Pickles/Relish

refrigerated pickles and relish, no shelf stable



Holiday Meals

Retailers catering large parties. Example: ordering your Thanksgiving dinner from a retailers which includes meat, side dishes, and salad

Source: Circana Integrated Fresh 2025.

Deli

Deli Prepared – items that are supposed to make meal occasions easier on the consumer. Can be hot and ready or heat and eat. These items are more traditional meal components.





Entrees
items in the deli that are a protein and a side (think spaghetti and meatballs or chicken and rice)



Side Dishes
beans, bread, fries, pasta, potato, rice, and vegetable side dishes in the deli



Breakfast
deli items that are typically breakfast items



Prepared Meats
items like rotisserie chicken. Meat that is already cooked and tends to be seasoned but with no other component



Appetizers
anything that is usually eaten as a starter from the deli (wings, tenders, olives, egg rolls)



Combo meals
multiple items in the deli that are sold as one unit



Salads
any type of salad in the deli, can be packaged macaroni salad or a lettuce-based salad from the salad bar



Soups & Chili
soups and chili that are in the deli, they don't have to be hot and ready. Can be cold and packaged



Desserts
Tend to not be branded, dairy desserts like a yogurt parfait that sits in the deli



Sandwiches
premade sandwiches from the deli

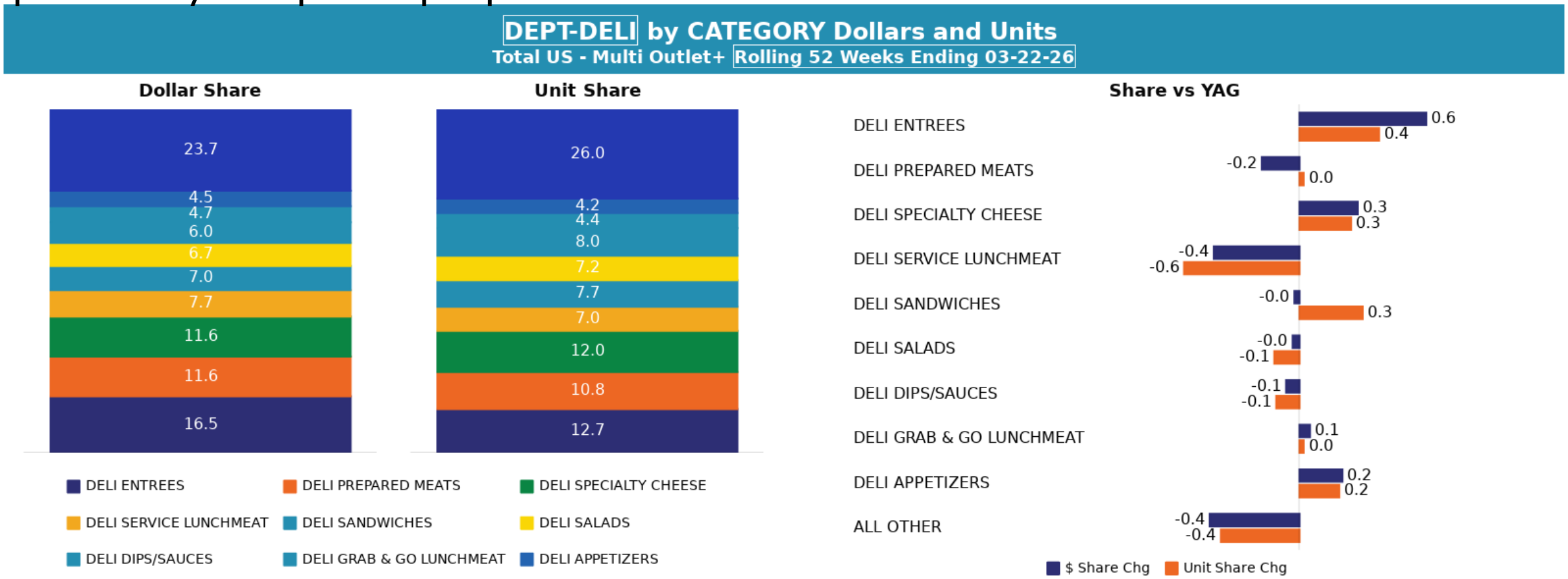


Pizza
can be by the slice or whole and can be hot and ready or heat and eat

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Source: Circana Integrated Fresh 2025.

Deli Department Share shows shift from Service to more Entrees & Snacks plus easy-to-pick up options



Adjust Category Share Threshold 80.0 All Other includes DELI SIDE DISHES, DELI PRE-SLICED LUNCHMEAT, DELI SOUPS & CHILI, DELI PIZZA, DELI TRAYS, DELI SPREADS, DELI SERVICE CHEESE, DELI GRAB & GO CHEESE, DELI RFG PICKLES/RELISH, DELI PRE-SLICED CHEESE, DELI BREAKFAST, DELI COMBO MEALS, DELI DESSERTS, AO DELI PREPARED, DELI HOLIDAY MEALS, DELI PRE-SLICED DAIRY ALTERNATIVE CHEESE, DELI SPECIALTY DAIRY ALTERNATIVE CHEESE, DISPENSED BEVERAGES, AO DELI MEAT and AO DELI CHEESE

Circana. Source: Circana Integrated Fresh Market Advantage

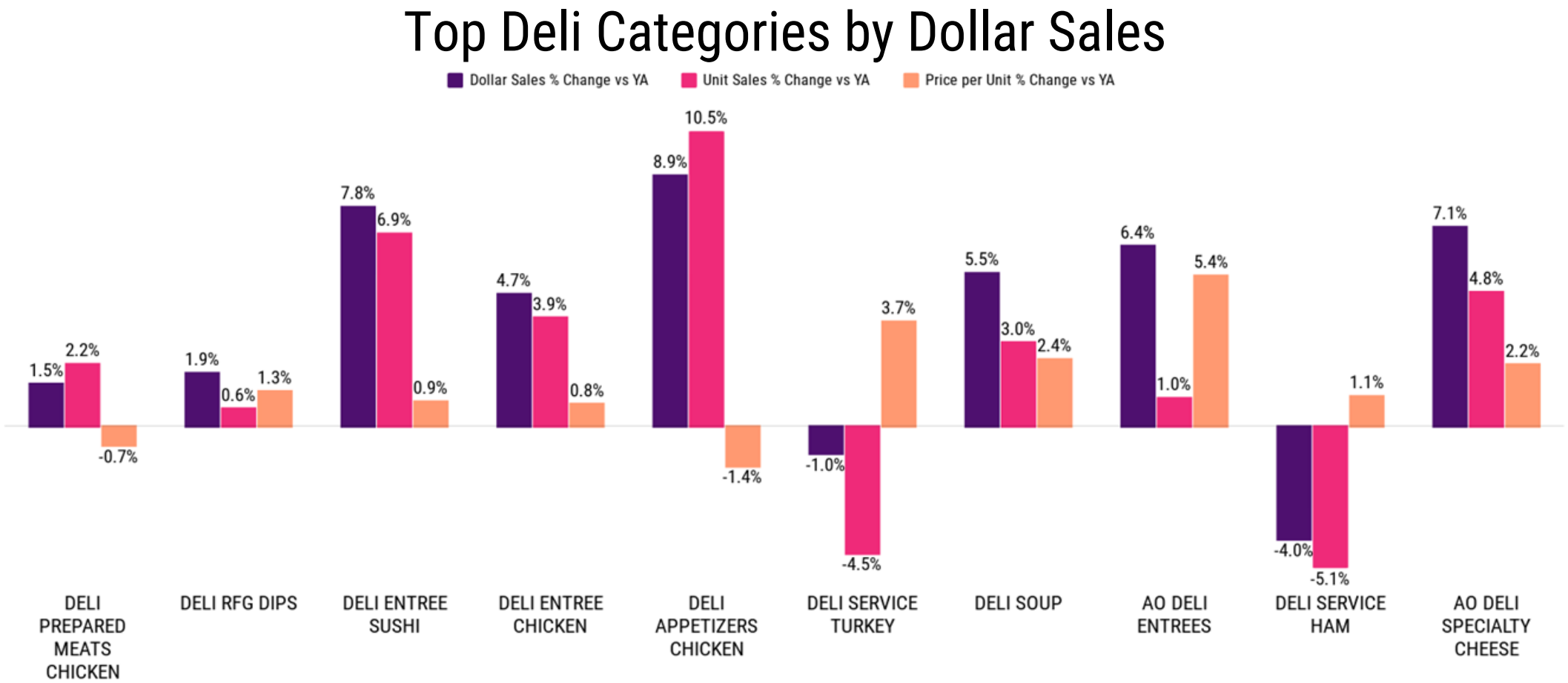
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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

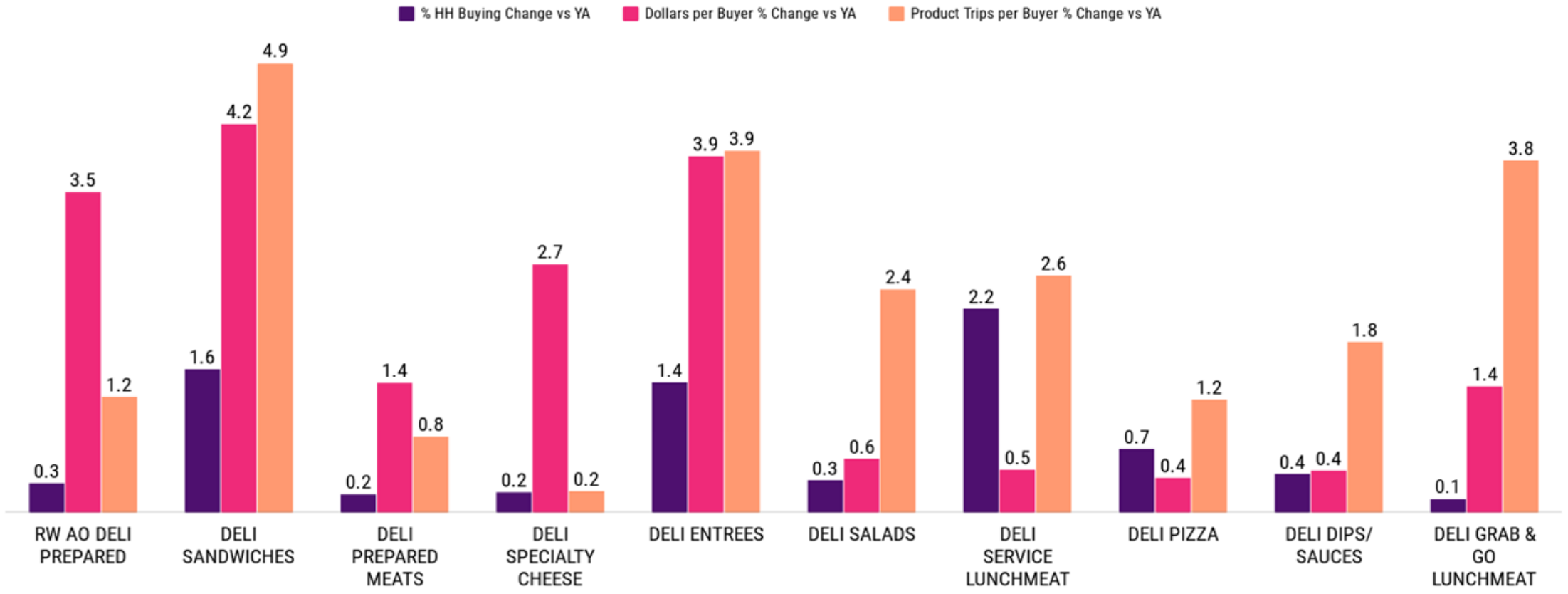
Sushi, Entrée Chicken, Appetizers Chicken & Soup see the largest performance growth in Deli



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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

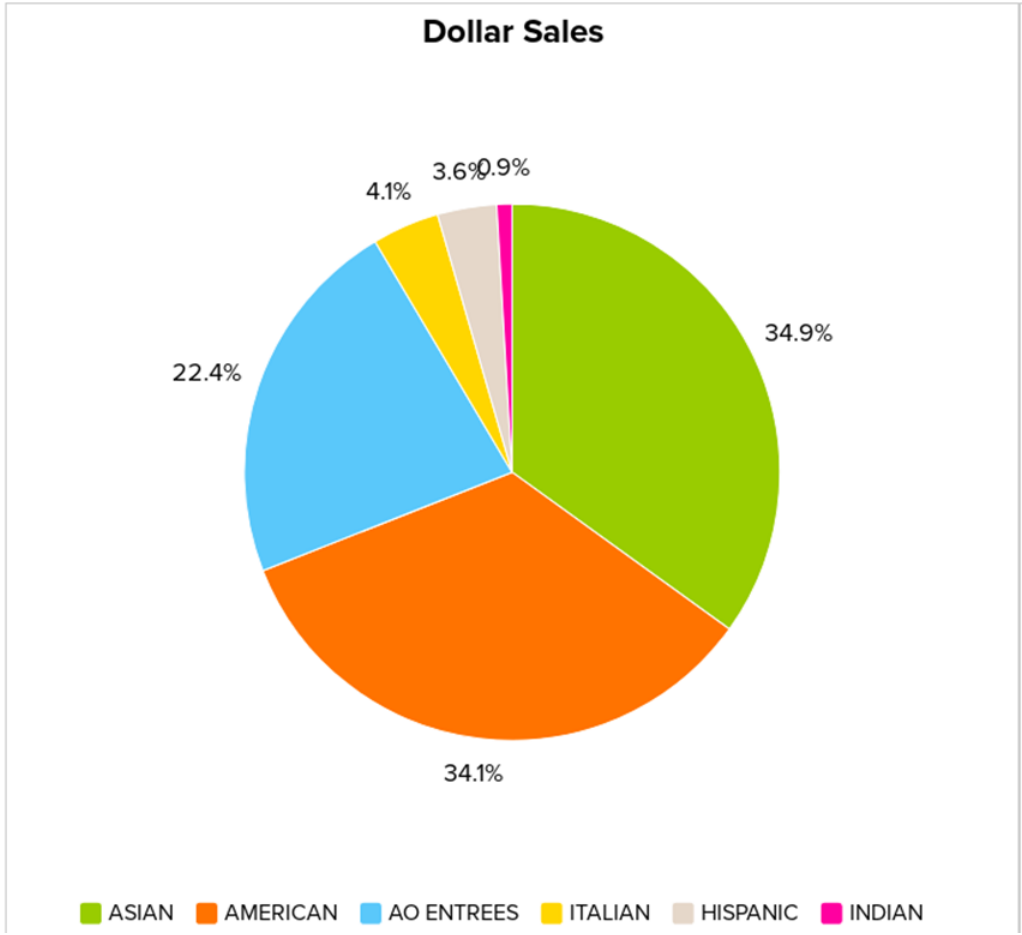
Deli Sandwiches, Deli Entrees & Grab and Go Lunchmeat lead in consumer engagement growth



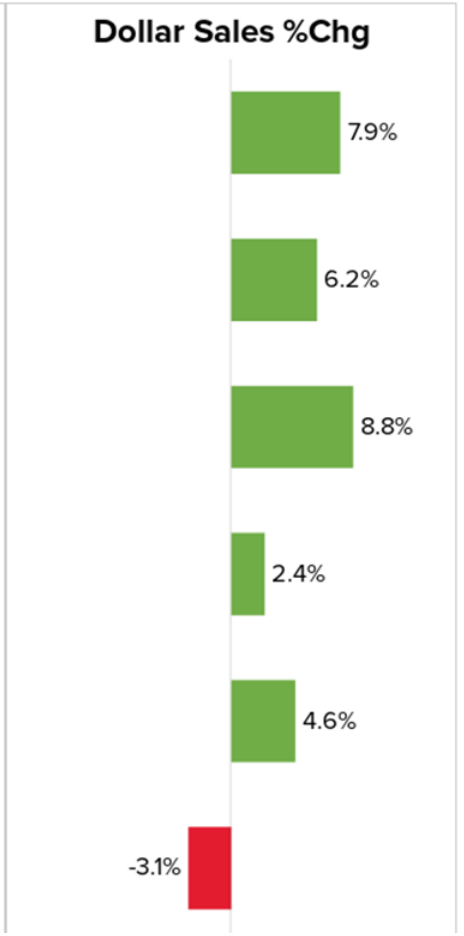
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Source: Circana Integrated Fresh Panel, Total US – All Outlets, L52 WE 3/22/2026

Understand where the trending flavors within **Deli Entrees** are critical for knowing consumer interests & gravitation







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Source: Circana Integrated Fresh, Total US MULO+, Deli Entrees, L52 WE 3/22/2026



37%

of restaurant consumers are ordering **smaller portion sizes** than normal this year

This group **grew** from **35%** in Fall 2025

Source: Circana, Checkout Omnibus survey, March 2026; n = 11,287
Fall 2025 = Oct/Nov survey

Why smaller portions?

Most people who are ordering smaller portions are doing so for health reasons.

59%
To manage my health

49%
To keep costs down

17%
I'm taking GLP-1s



While **GLP-1s** are a common reason given for ordering smaller portions, most people ordering smaller portions aren't on GLP-1s

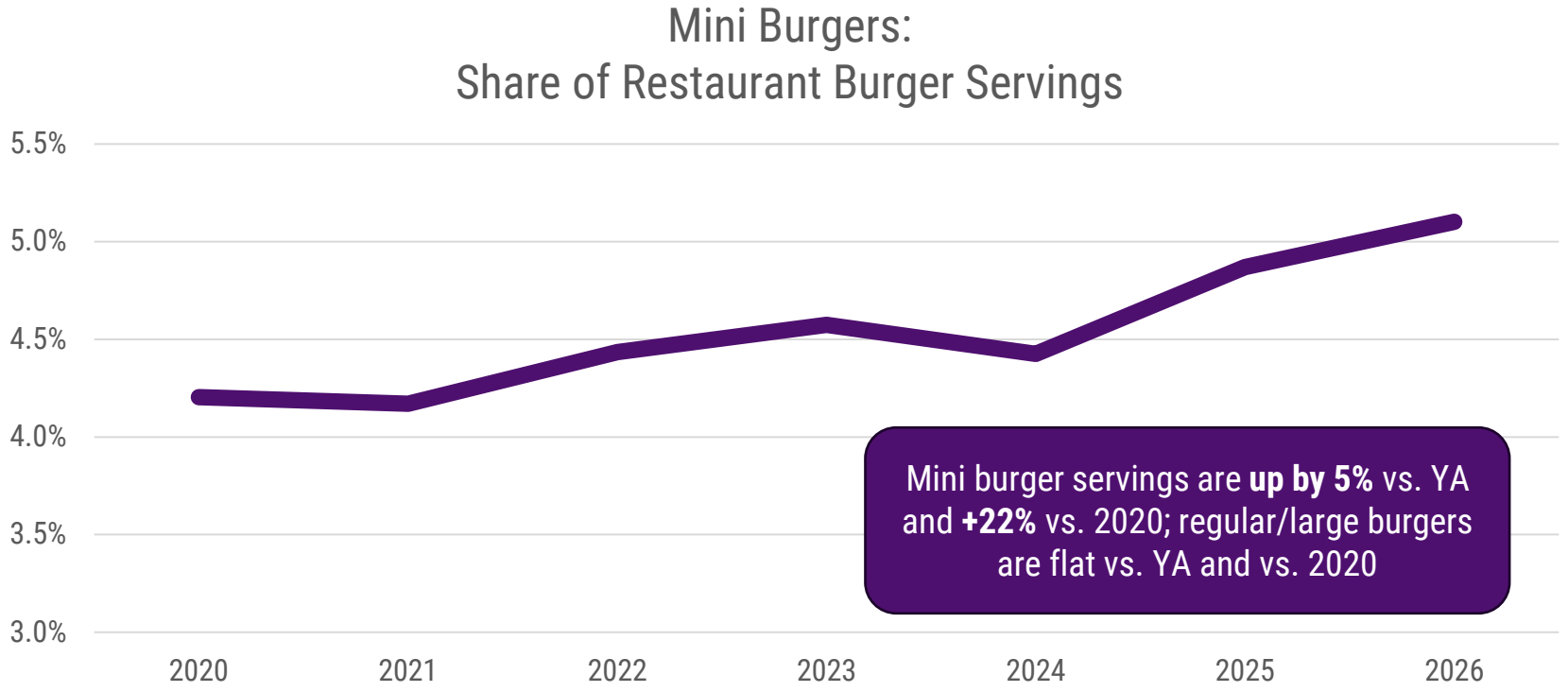
Question: Why are you ordering smaller portion sizes than normal?

Circana.

Source: Circana, Checkout Omnibus survey, March 2026; n = 11,287
Among the 37% who say they are ordering smaller portions; Excludes 6% who chose "other" reason

Order a slider over a regular burger

Mini burgers are still relatively small compared to regular and large burgers, though are steadily gaining share; Smalls and Savvy Sliders are two new mini burger concepts growing locations rapidly.



Location PCYA

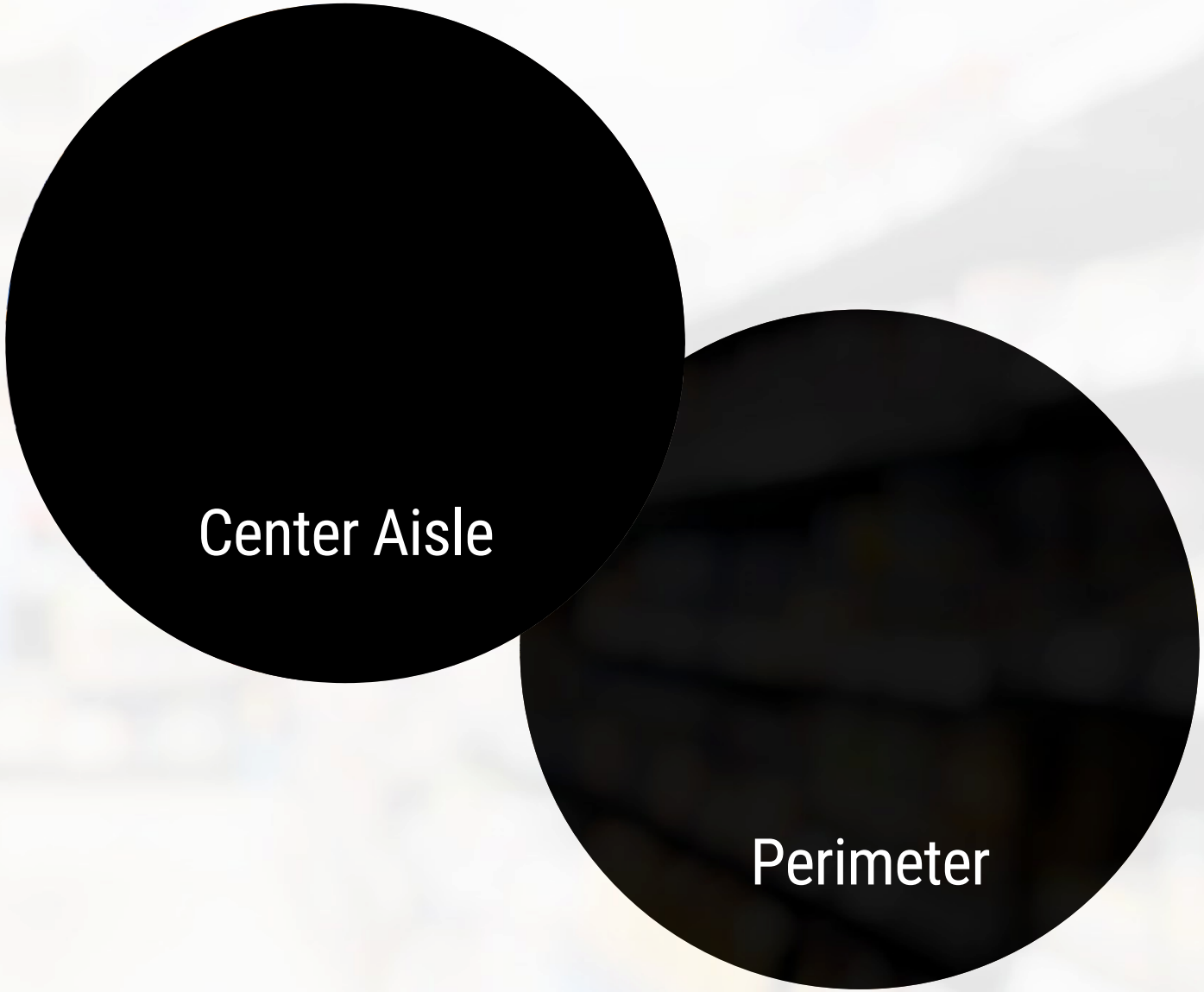
smalls SLIDERS — **+118%**

SAVVY SLIDERS® MORE 2 LOVE® — **+22%**

Source: Circana, CREST®, total restaurants, 12 ME February; ReCount Fall 2025

Bakery Department

Each retailer has a unique assortment and definition of what they consider “bakery”; Circana / IDDBA view is:



Source: Circana Integrated Fresh 2025.

Bakery

Center Aisle | Bakery items that sit in the center store; usually large brands, all UPC'ed

Perimeter | Bakery that is in the bakery department in the store perimeter; can be items that the retailer baked but can also be prepacked

What is bakery?



Breads & Rolls

Breads, Buns & Rolls, Bagels/Bialys, English Muffins, Wraps/Flatbreads, Croissants



Desserts / Sweet Snacks

Cakes, Cookies, Pies, Snack Cakes, Brownies/Squares/Bars, Specialty Desserts



Morning Bakery

Donuts, Muffins, and Pastry / Danish / Coffee Cakes



Other Perimeter Bakery

What isn't bakery?

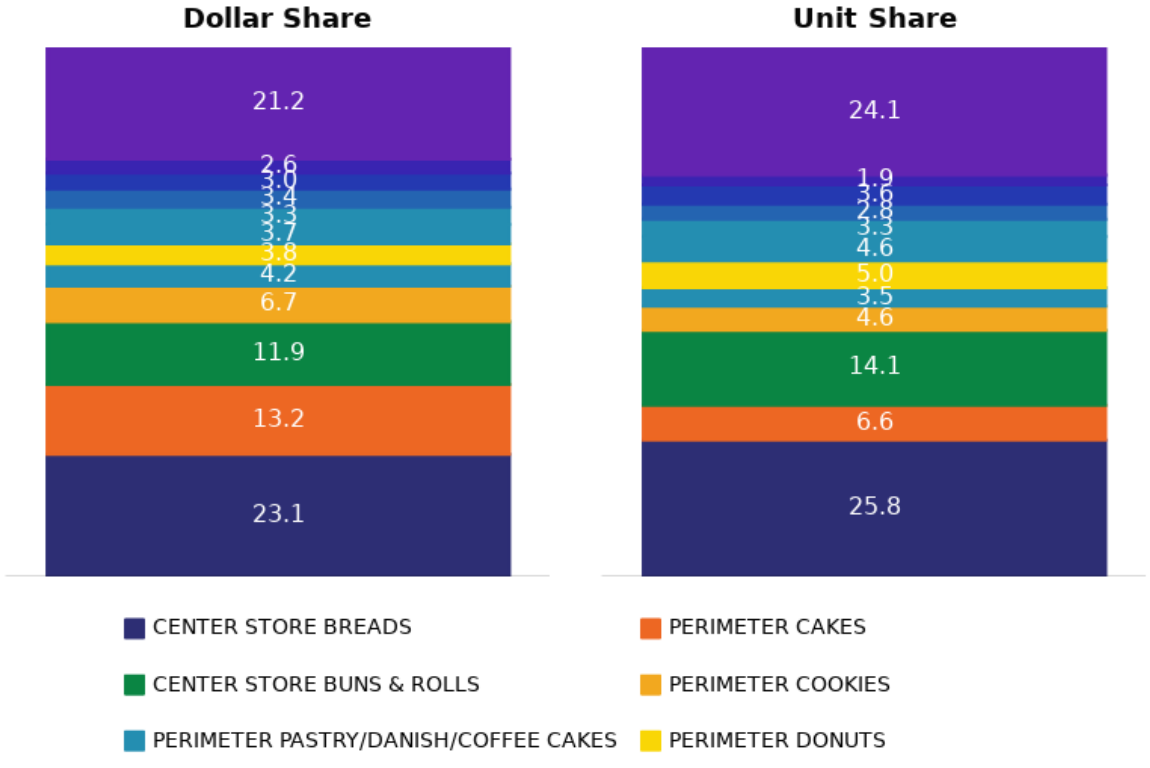
Frozen desserts and breads are not in this department. Cookies in the cookie and cracker aisle.
Tortilla's that aren't in perimeter will be in the Mexican section of grocery

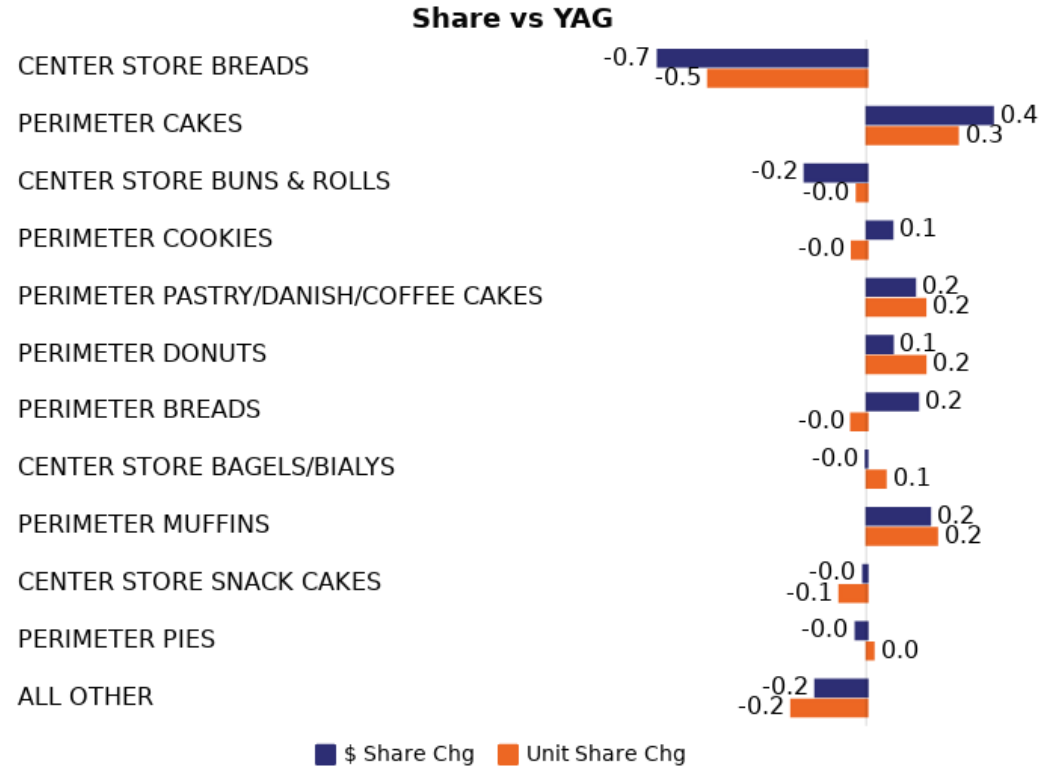
Source: Circana Integrated Fresh 2025.

Perimeter Desserts/Morning have driven more sales share while Center-Aisle Breads are contracting

DEPT-BAKERY by CATEGORY Dollars and Units

Total US - Multi Outlet+ Rolling 52 Weeks Ending 03-22-26





Adjust Category Share Threshold 80.0 All Other includes PERIMETER BUNS & ROLLS, CENTER STORE COOKIES, CENTER STORE DONUTS, CENTER STORE MUFFINS, PERIMETER CROISSANTS, CENTER STORE ENGLISH MUFFINS, CENTER STORE PASTRY/DANISH/COFFEE CAKES, CENTER STORE BROWNIES/SQUARES/BARS, PERIMETER BAGELS/BIALYS, PERIMETER BROWNIES/SQUARES/BARS, 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

Circana. Source: Circana Integrated Fresh Market Advantage

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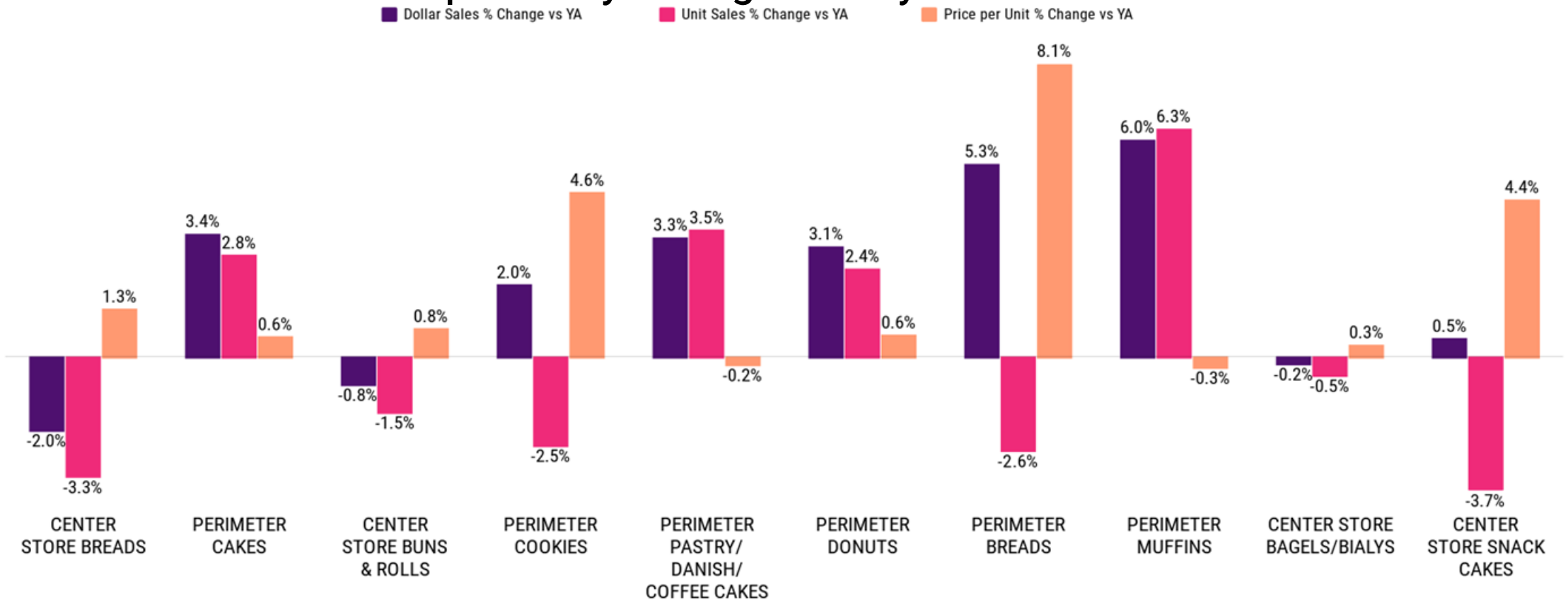
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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

Perimeter Cakes, Pastry/Danish Coffee Cakes, Donuts & Muffins see the highest performance growth in the bakery department

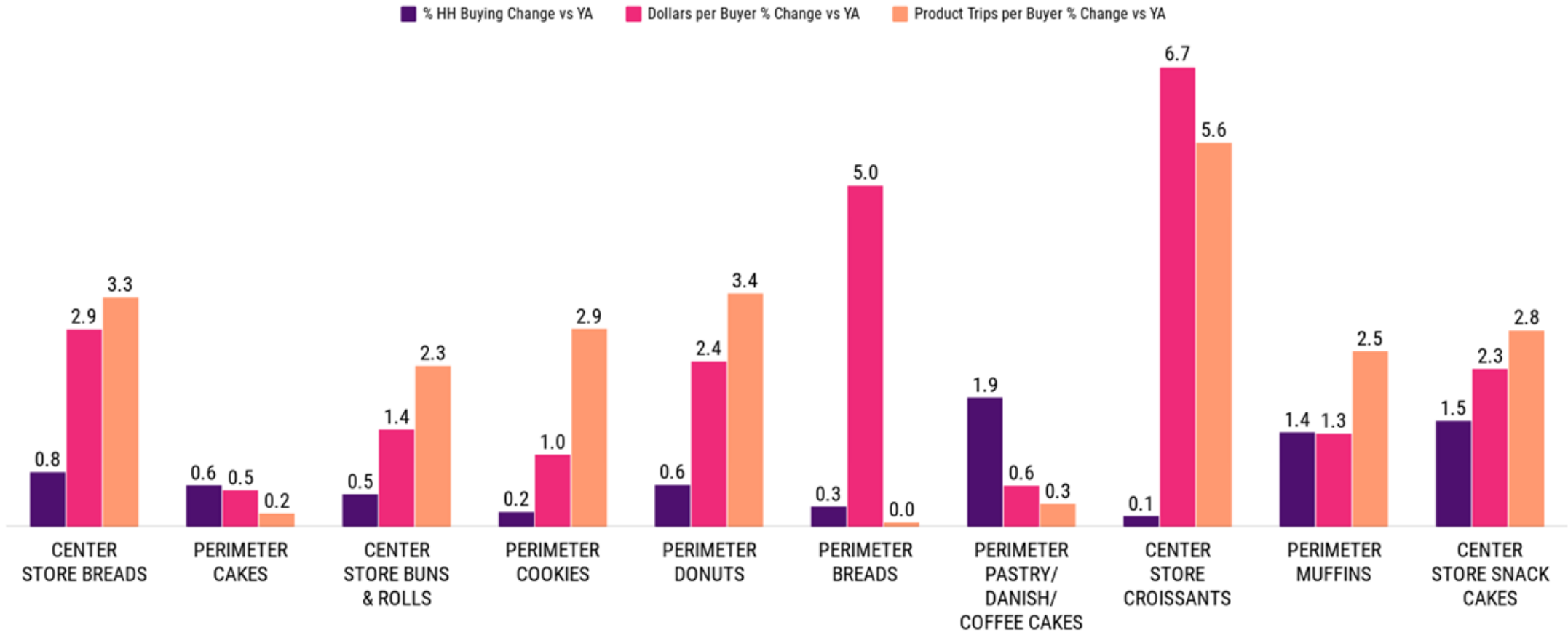
Top Bakery Categories by Dollar Sales



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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

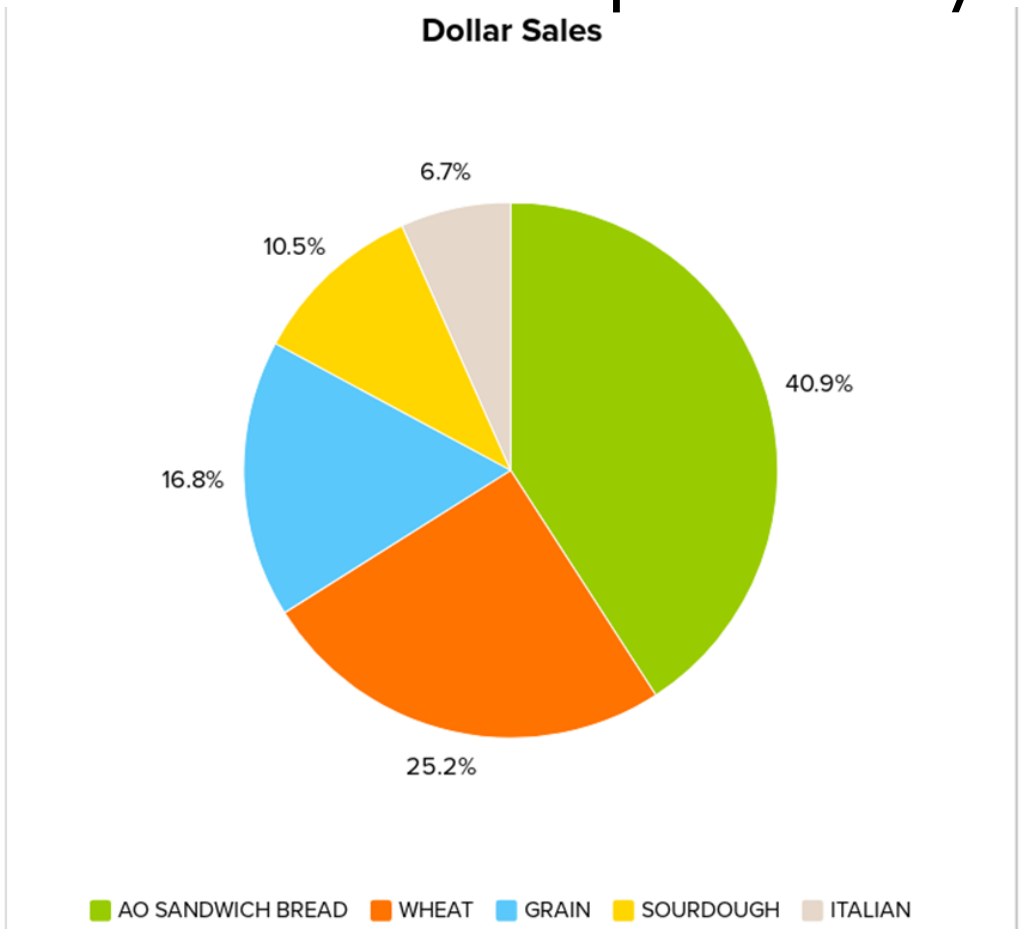
Bakery categories leading in consumer growth in L52wks are a mix of indulgence & everyday needs

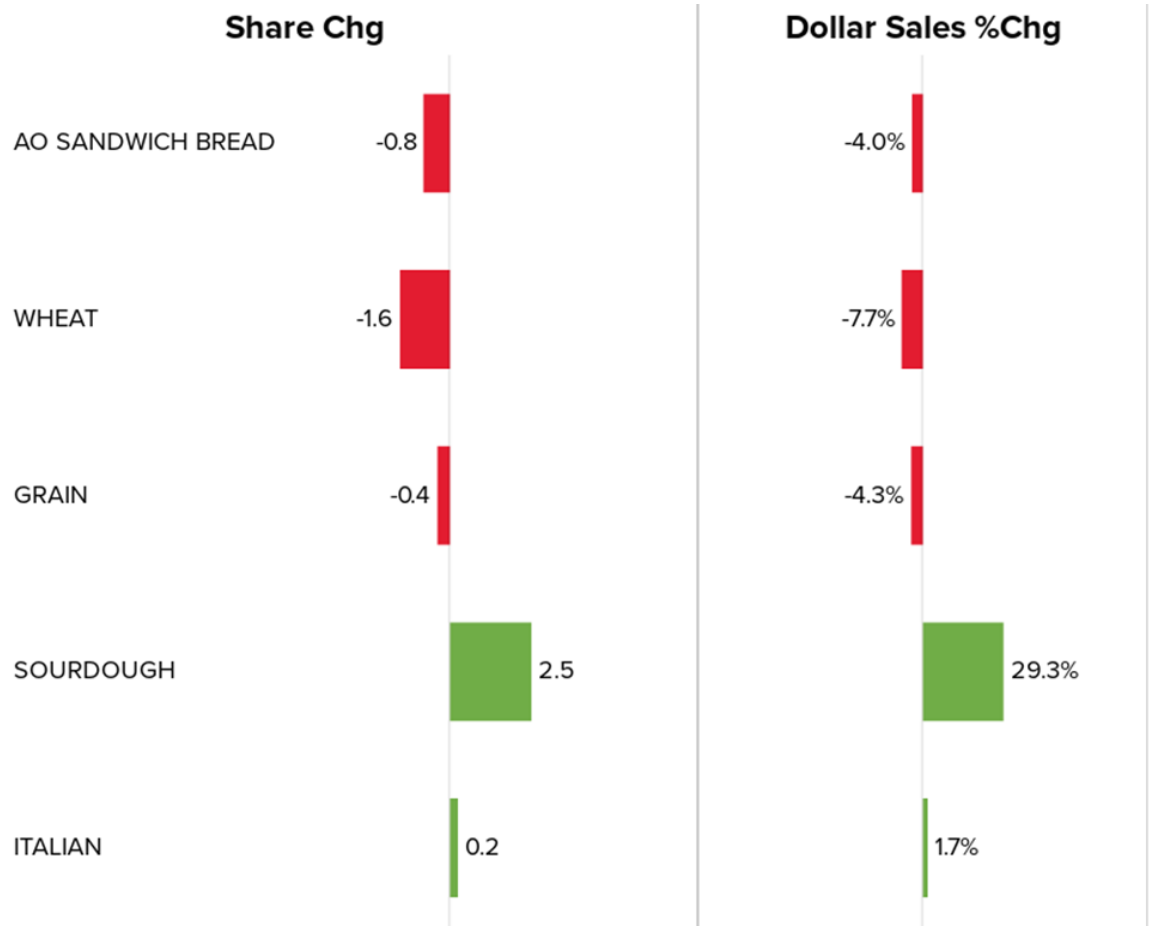


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Source: Circana Integrated Fresh Panel, Total US – All Outlets, L52 WE 3/22/2026

Flavor trends for the leading category, *Center Store Bread*, see a retraction in **wheat or grain** items and a growth in **sourdough or Italian** breads specifically

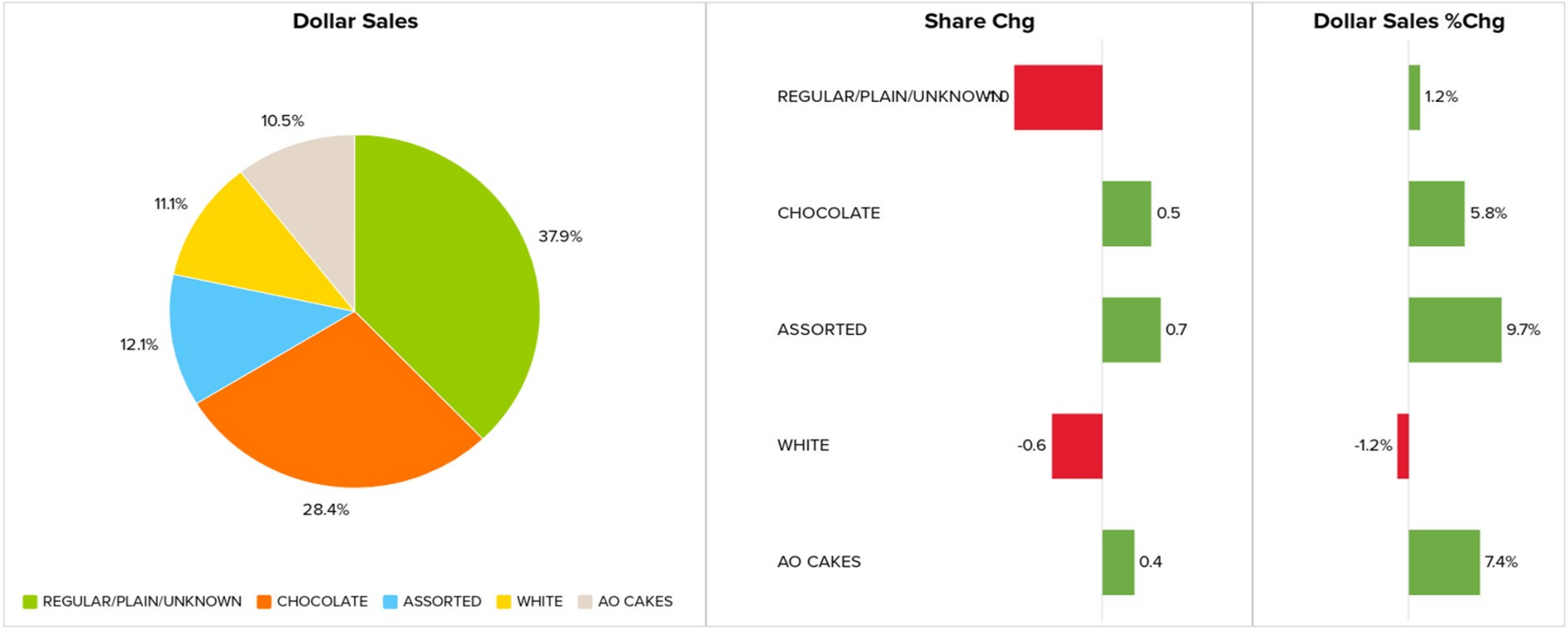




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Source: Circana Integrated Fresh, Total US MULO+, Center Store Bread, L52 WE 3/22/2026

Flavor trends for the 2nd leading category, *Perimeter Cakes*, sees pockets of growth in **Chocolate, Assorted & AO cakes** while there is a pull back from **White or Plain** cakes



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Source: Circana Integrated Fresh, Total US MULO+, Perimeter Cakes, L52 WE 3/22/2026

Dairy Department





Milk
includes dairy and non dairy refrigerated milks



Dairy Natural Cheese
natural cheese that sits in the dairy section of the store (can be slices, chunks, shreds, and snack)



Eggs
can be a carton or liquid eggs



Yogurt
regular yogurt and yogurt drinks



Butter/Margarine/Spreads



Dairy Processed Cheese
cheese that are made with an emulsifying agent (mainly American or spreadable cheeses)



Whipped Toppings
all dairy and non dairy refrigerated whipped toppings



Sour Cream
dairy and alternative sour cream



Rfg Desserts
dairy and non dairy refrigerated desserts like gelatin, pudding, and parfait



Cheese Snack Kits
adult Lunchables that are mainly cheese, nuts, and crackers



Cottage Cheese



Cream Cheese



Dairy Alternative Cheese
nondairy cheese alternatives

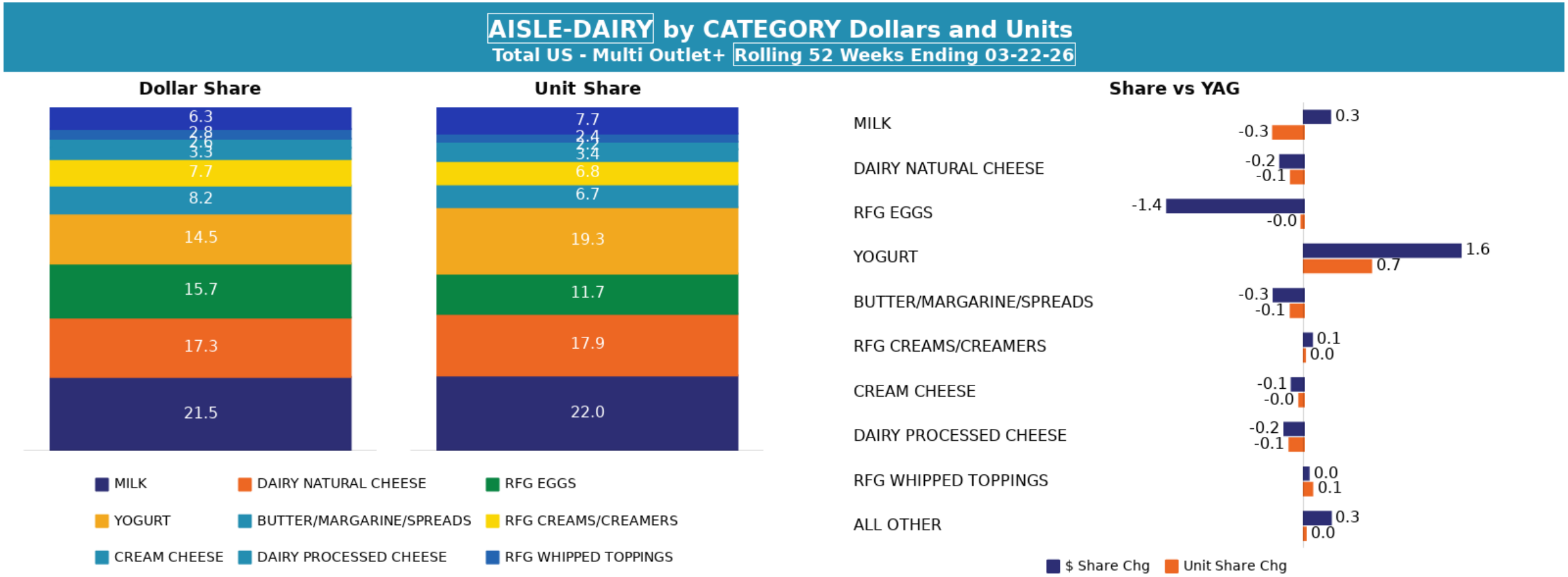


Creams/Creamers
all dairy and non dairy refrigerated creams/creamers

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Source: Circana Integrated Fresh 2025.

In Dairy, egg pricing coming down eroded dollar share versus last year; but units remained stable. Yogurt commands much more department share in both sales and units driven by matching consumer needs



Adjust Category Share Threshold 95.0 All Other includes COTTAGE CHEESE, SOUR CREAM, RFG DESSERTS, RFG CHEESE SNACK KITS and DAIRY ALTERNATIVE CHEESE

Circana. Source: Circana Integrated Fresh Market Advantage

Visit IDDBA.Org to find these latest sales trends reports updated monthly!

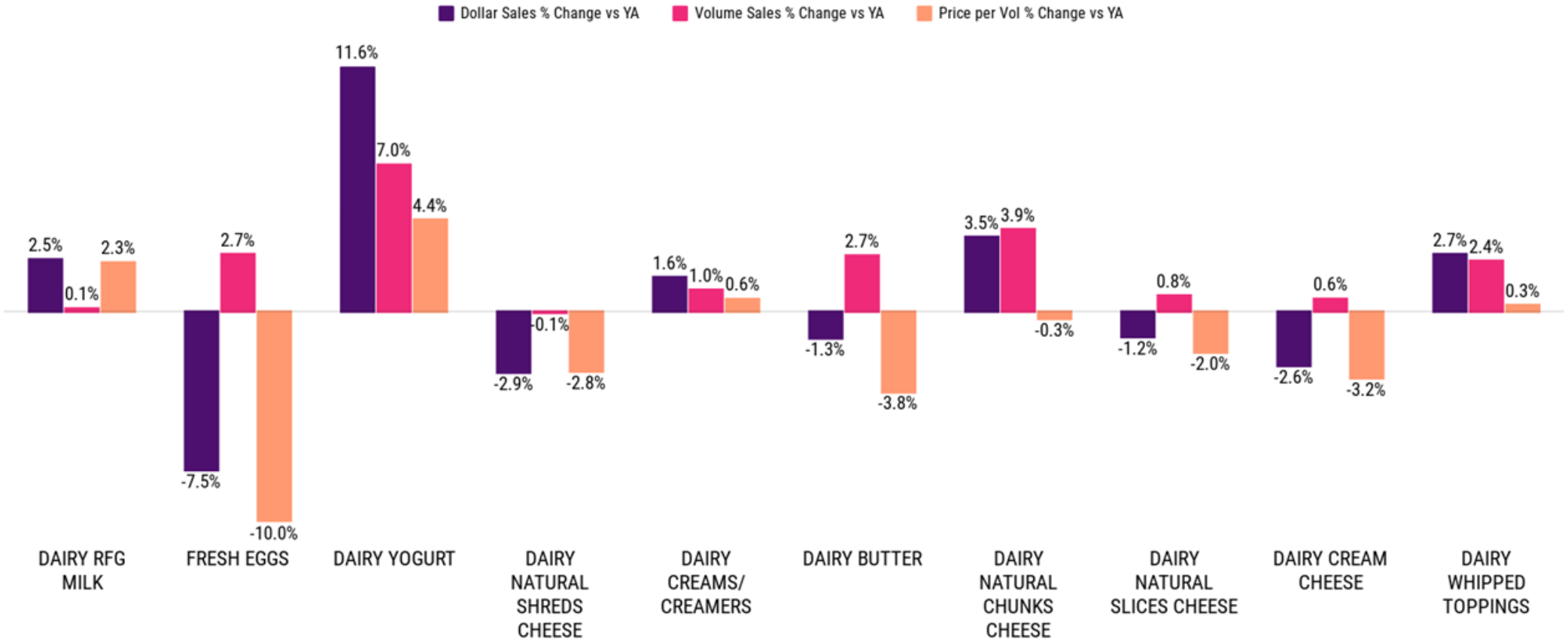
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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

Yogurt, Cream/Creamers, Natural Cheese Chunks & Whipped Toppings are the highest growth categories in the dairy aisle

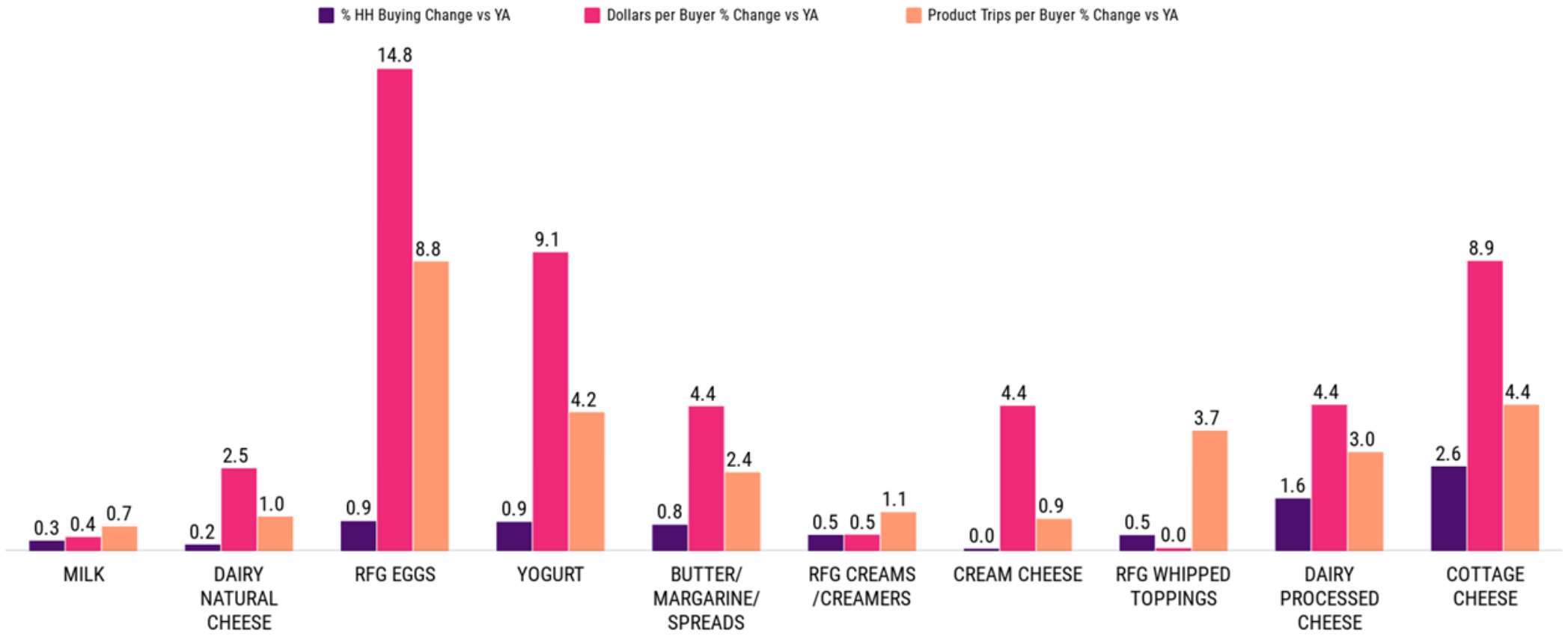
Top Dairy Categories by Dollar Sales



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Source: Circana Integrated Fresh, Total US MULO+, L52 WE 3/22/2026

Rfg eggs, Yogurt & Butter/Margarine, Cream Cheese, Processed Cheese & Cottage Cheese continue to be leaders in the dairy aisle in consumer growth

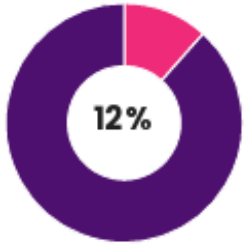


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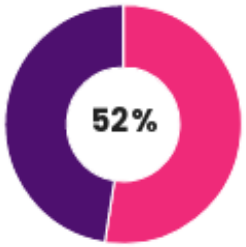
Source: Circana Integrated Fresh Panel, Total US – All Outlets, L52 WE 3/22/2026

E-Commerce makes up 12% of Dairy15 sales and accounts for 52% of growth. E-Comm and B&M dollar growth balanced.

E-commerce Share of MULO+ Sales



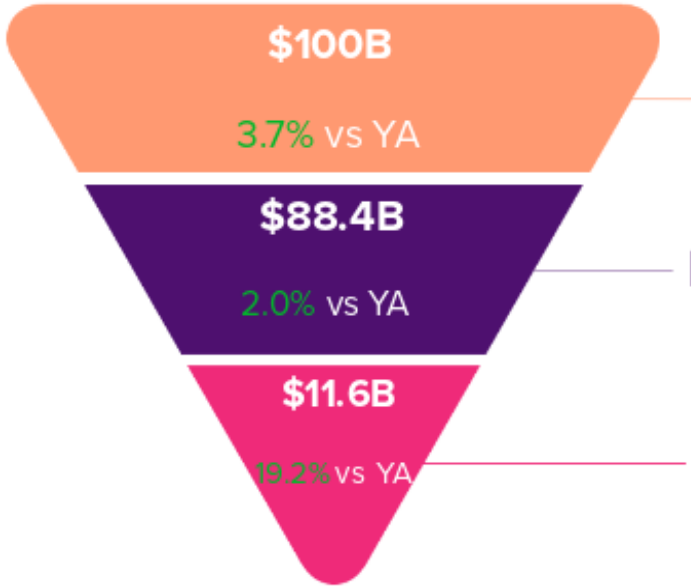
E-commerce Share of MULO+ Growth vs YA



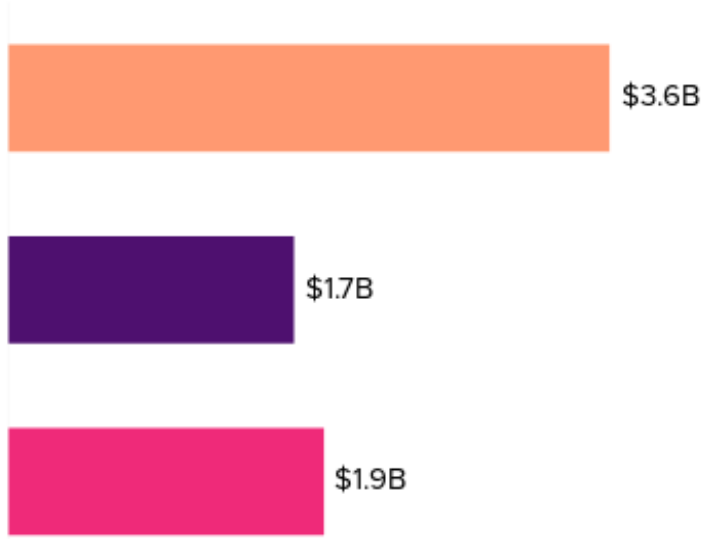
MULO+ Channel Sales and Change for **Dairy15 Tsv**

Calendar Year 2025 Ending 12-28-25

$ Sales and % Chg vs YA



$ Chg vs YA by Channel



Circana OmniMarket Total U.S. MULO+ w/C – 52 Weeks Ending Dec 28, 2025 (Total Milk incl. Plant-Based)

Dairy brands resonating with Gen Z and Younger Millennials include both health and wellness and permissibly indulgent products

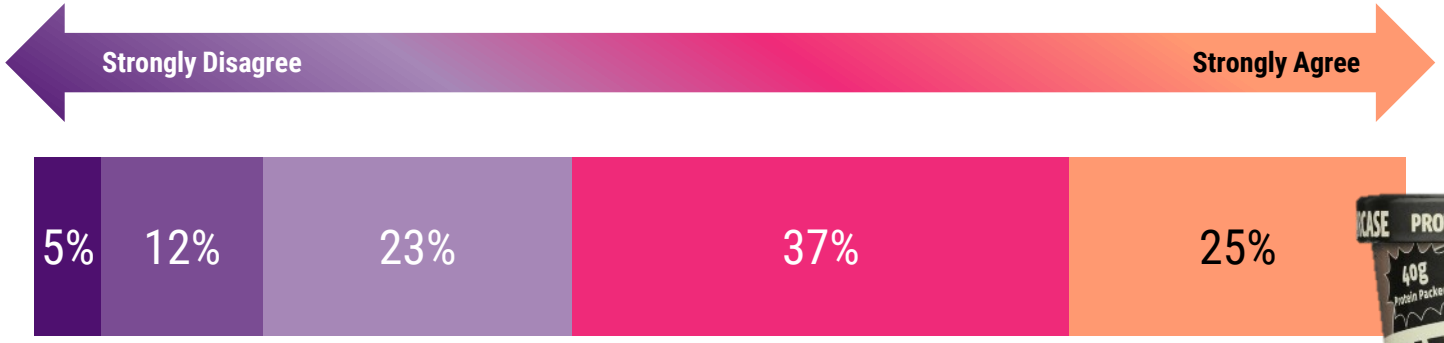


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Most consumers are paying attention to ingredients and nutrition labels

Share of Consumers Who Pay Attention to Labels

Q: "How much do you agree or disagree with this statement: when shopping for groceries, I pay attention to ingredients/nutritional labels."





Source: Circana, CREST® Commercial Foodservice, 12 ME November 2025

Updated dietary guidance echoes consumer shift to whole and simple

New USDA Food Pyramid guidance emphasizes whole foods while Non UPF Verified labeling clearly identifies minimally-processed products on shelf for consumers

2025-2030 USDA Food Pyramid

- Prioritizes whole foods, with guidance to avoid highly-processed food products
- Visually emphasizes protein, **full-fat dairy,** fruits, and vegetables and de-emphasizes whole grains



Non-UPF Verification

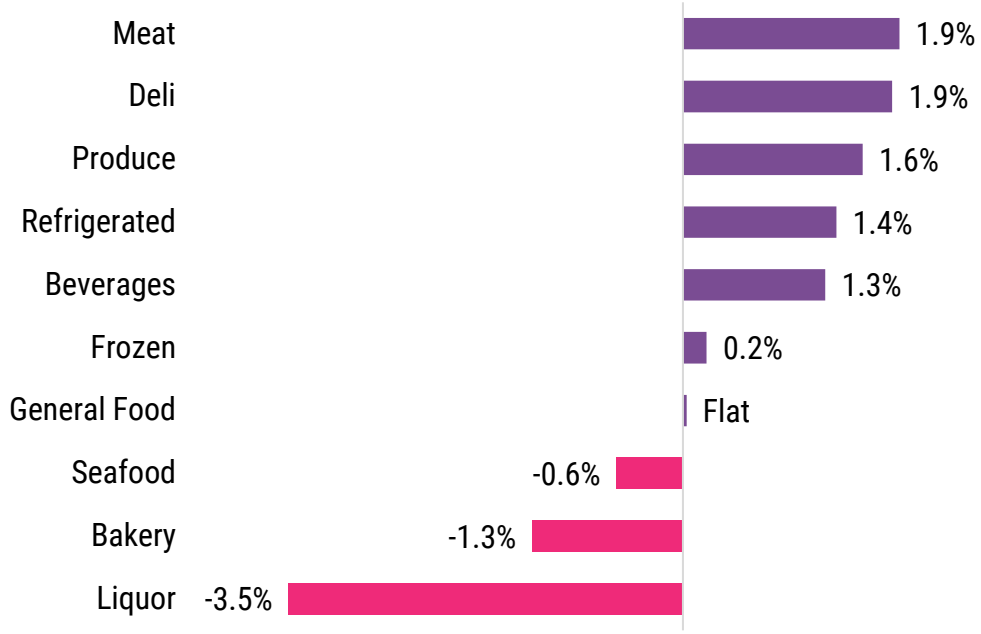
- Non-Ultraprocessed Food Verification from the Non-GMO Project
- Spindrift and Amy's first brands to receive verification



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Integrated Fresh Departments

Units % Chg vs. YA



Sources: realfood.gov; nonultraprocessed.org; Circana Syndicated Integrated Fresh, Total US – MULO+, CY2025 ending 12-28-25

Momentum for Real Ingredients

Amidst a growing focus on ultra processed foods, brands are bringing simple ingredient and less processed product formulations to market. Dairy is well positioned to benefit from this as a natural source of protein and nutrition.

01 Too good & co. Coffee creamer



- Real Milk and Cream
- No artificial sweeteners
- No artificial flavors
- No added gums or oils
- No preservatives
- 40% less sugar

02 Coffee mate natural bliss 4 ingredients



- Real Milk and Cream
- Made with only 4 ingredients

03 Horizon organic coffee creamer



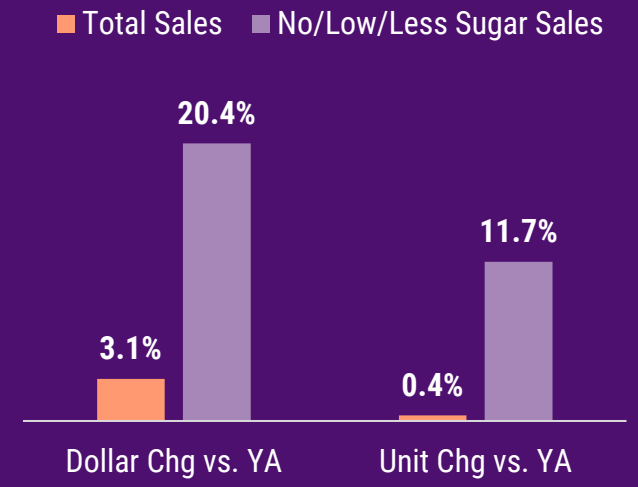
- Organic real Dairy Creamer
- Made with only 4 ingredients

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No/Low/Less Sugar innovation continues to outpace total category performance across multiple aisles

Aisle-led share gains in Snacks, Dairy, and Center Store are powering performance with Dairy Aisle leading in Dollar share

Food & Beverage



No/Low/Less Sugar Claims Growth – Top Aisles

Dollar Share Point Chg vs. YA

	Claim 2025 Sales	Claim Share of Total Sales	
Snacks	$2,133M	6%	1.8
Dairy	$4,639M	**12%**	0.9
Refrigerated Meats	$556M	1%	0.6
Carbonated Soft Drinks	$4,137M	11%	0.5
Bakery	$602M	2%	0.5
Frozen Meat/Poultry/Seafood	$311M	1%	0.5
Frozen Meals	$219M	1%	0.3
Candy	$3,450M	9%	0.2
Refrigerated Meals	$169M	0%	0.2
Baking	$612M	2%	0.1

Source: Circana Syndicated POS, Total US – MULO+, L52WE 12-28-25

At the forefront of wellness trends, protein leads the way in innovation and line extensions

Evolving Classics

Dollar Sales $ Sales % Chg vs YA

LEGENDARY FOODS



Mac and cheese with 47g of protein and 7g net carbs. Releasing March 31, 2026

New New

CONAGRA BRANDS



Each serving has 14g of protein and 7g of fiber; released boxed, microwaveable, and deluxe boxed versions

$140M +163%

PEPSICO



10g of protein per one-oz serving while maintaining signature bold flavor and crunch. No artificial colors or flavors. Releasing April 2026.

New New

Protein for Everyone



Red Baron's Classic Crust pizza line has high protein content ranging from 50g - 60g of protein per pizza

$599M +2%



CHOMPS

Chomps beef jerky sticks; 10g of protein, zero sugar, and 100 calories per stick

$582M +70%



Uncrustables launched two new flavors Up & Apple and Bright-Eyed Berry with 12g of protein, twice the protein in a traditional Uncrustable

$5M New

Source: Circana POS, MULO+, CY2025 ending 12-28-2025; Brand Websites

Dairy Brands are taking Protein levels to new heights with innovation

01 Oikos Protein Shakes

30g of complete protein

5g of prebiotic fiber

No artificial sweeteners

1g of sugar



02 Go-gurt Protein Yogurt Tubes

Perfect for on-the-go

Contains two times the protein of Original Go-GURT



03 Kraft Big Cheese Snack Protein+

17g of protein per stick



04 Ultrafiltered & High Protein Milks

Dairy and nutrition brands leaning into ultrafiltered milk products that deliver the high protein, low sugar benefits consumers want.



05 Profeel Protein Pudding

17g of milk protein

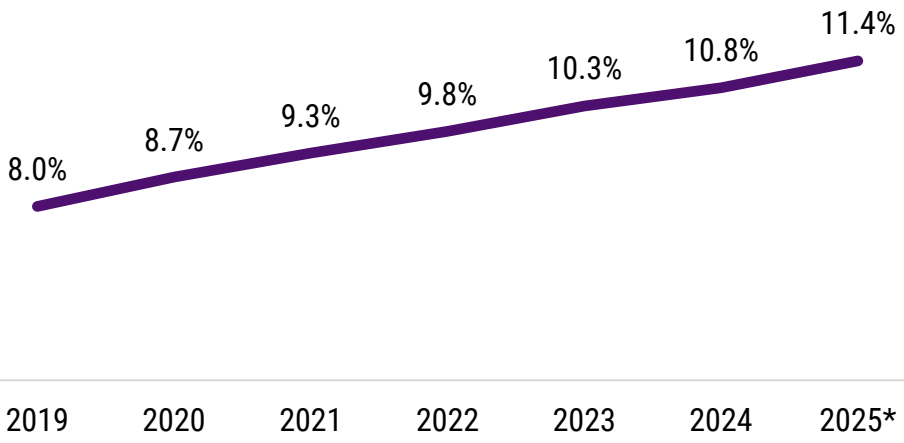


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Consumers seek out protein even when eating out

Eleven percent of meals are consumer-reported as “high protein”, the fastest-growing food descriptor in recent years. Gen Z and millennials are most likely to consume high-protein meals.

Share of Commercial Foodservice Visits Where the Food/Drink Is Described as “High Protein”



Generation	% High Protein
Gen Z	**15.5%**
Millennials	**13.2%**
Gen X	10.2%
Boomers	7.6%
Silent/GI Gen	6.7%



*Source: Circana, CREST®, commercial foodservice; excludes snack dayparts and beverage-only visits; 12 months ending Dec. *2025 = 12 months ending Oct.*

Protein and fiber claims on package are a winning combination, supporting a variety of consumers' health needs

Functional meal and snack options provide consumers convenient products to meet those needs both at home and on-the-go



Life Cuisine Vital Pursuit
Frozen Pizza

$16M
L52W $ Sales

+231%	+246%
$ Chg vs. YA	Unit Chg vs. YA

Fiber-Rich Ingredient
Flax Meal



Trubar
Nutritional Health Value Bars

$37M
L52W $ Sales

+17%	+66%
$ Chg vs. YA	Unit Chg vs. YA

Fiber-Rich Ingredient
Cassava



:Ratio Pro-Fiber
Refrigerated Yogurt

New
Launched November 2025

Fiber-Rich Ingredients
Corn and Chicory Root



Goodles
Dry Macaroni & Cheese

$140M
L52W $ Sales

+163%	+143%
$ Chg vs. YA	Unit Chg vs. YA

Fiber-Rich Ingredient
Specialized Wheat Flour

Protein + Fiber = Power Pair for Consumers:

- Using GLP-1s
- Who prefer food-based nutrition to supplements
- Seeking satiety for weight management
- Balancing blood sugar
- Who need nutritional efficiency
- Concerned with gut health

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GLP-1 Friendly Innovations

Manufacturers are innovating to support the growing population of GLP-1 users, who are recommended to follow a high protein, high fiber, low sugar diet.

01 OIKOS FUSION DAIRY DRINKS

- Builds and retain muscle mass during weight loss
- 0g added sugar
- 23g protein
- 5g prebiotic fiber



02 LIFEWAY MUSCLE MATES DRINKS

- 20g protein and 5g creatine for muscle health
- Lactose free
- Probiotic cultures



03 RATIO PRO-FIBER CULTURED DAIRY CUPS

- Ultrafiltered Milk
- 20g protein and 10g fiber
- 1/3 daily recommended value for adults



04 TODO FIBER + PROTEIN SHAKES

- Naturally boosts GLP-1 production
- 26g protein and 6g of prebiotic fiber
- Control hunger, support metabolism, promote gut health



05 TWO SPOONS CREAMERY HIGH PROTEIN ICE CREAM

- 30g of protein per pint
- No added sugar.
- Marketed as GLP-1 and Keto diet friendly – sweetened with Allulose and Monk Fruit for blood sugar regulation.



06 BOOST PRE-MEAL HUNGER SUPPORT DRINK

- Designed to promote natural GLP-1 production in the body.
- Made with whey protein isolate from milk,
- 10g of protein per 4.2 oz serving.



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Dimensions of value: market beyond price

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

Source: Circana & FMI Dimensions of Value.

Thank you

Join us for another Deep Dive!
Link to Register

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