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SHOPPER INTELLIGENCE

Chicken Wins the Cart, Beef Wins the Register

What American loyalty data reveals beneath the meat department's record year.

A BIRDZI PERSPECTIVE BY RON BONACCI

2026 · MEAT & PROTEIN

THE RECORD YEAR

The headlines are unanimous, and genuinely good

According to the 2026 Power of Meat report from FMI and the Meat Institute — covered across the trade press from FMI's own analysis to Grocery Dive — the meat department closed 2025 at a record $112 billion, up 6.8% in dollars with pounds up 2%.

$112B	+6.8%	~70%	56+
MEAT DEPARTMENT DOLLARS, 2025	DOLLAR GROWTH, POUNDS UP 2%	OF DOLLAR GROWTH DELIVERED BY BEEF	MEAT TRIPS PER HOUSEHOLD, PER YEAR

Nearly every U.S. household bought meat last year. Claims-based proteins grew double digits. Gen Z and Millennial shoppers drove two-thirds of unit growth, and protein-forward eating — including the fast-growing GLP-1 cohort — is reshaping when and why meat gets bought.

All of it is true. But national reports describe the category . Any one retailer can vary sharply from the average once real shopper data is in view — and only first-party data says which side of that average a given operator sits on.

> At Birdzi, we read the same year through household-level loyalty data from America's regional grocery operators — hundreds of millions of protein transactions across millions of households. The view from the loyalty card confirms parts of the national story, qualifies others, and reveals three findings the reports cannot see at all.

SIDE BY SIDE

The reports vs. the American loyalty card

THE INDUSTRY REPORTS SAY	THE LOYALTY DATA SHOWS	VERDICT
Pounds sold up 2% nationally	Regional operators can sit anywhere from units down 2% to up 2% or higher while dollars still grow — some of that growth carried entirely by new shoppers and promoted price.	The volume boom is unevenly distributed, and varies with each chain's protein mix.
Beef drives 70% of dollar growth	Beef holds roughly 45% of fresh meat dollars but grows only 1–2% — holding its value through price, not always through volume.	Confirms the dollars; qualifies the mechanism.
Chicken is the volume growth story	Chicken already sells around 50% more units than beef, and poultry's dollar share is climbing past 41% — faster at some chains than others.	In the cart, chicken has already won.
Pork stable, modestly growing	Pork dollars are flat to down year over year, with share compressing steadily except where price is promoted.	Unpromoted pork is weaker than the national picture.
Shoppers trade down and switch proteins	The dominant trade-down happens inside beef — out of premium cuts and into ground. Ground still wins the day.	Trade-down has an address, and it is recoverable.
56+ meat trips a year; nearly all households buy	Monthly meat shopper counts are remarkably stable — even in months where units slipped, trips held.	Demand stickiness is real; the pressure point is basket depth, not traffic.

None of this contradicts the national record. It resolves it — from a category average into a specific retailer's shelves, weeks, and households.

BEYOND THE REPORTS

Three findings only household data can make

1 The volume divergence is the whole argument for reading your own data.

Nationally, pounds grew 2%. In household-level data from American grocery operators, units can be down 2% over the same span — with sales still up nicely, because average retail rose faster than volume fell while total protein spend trended up. Any gap between the national average and a real operator's cart is the meat department's version of the industry's larger 2026 story. No national report will tell a given grocer which side of the average they are on. Their loyalty data will, in one query.

2 Chicken already wins the cart; beef still wins the register — and the register will follow the cart.

The industry frames chicken as the growth protein. The loyalty data says the unit battle is already over: chicken moves roughly one and a half packages for every package of beef, and poultry's share of fresh-meat dollars has climbed 1% to 6% in same-quarter comparisons while beef grew 1% to 2% and pork ran flat to down 5%. Beef's dollar dominance rests on price, and price-sensitive households keep shifting. The center of the plate is tilting toward poultry in the cart even while beef holds the register — a forward-looking signal for assortment, feature strategy, and space.

3 Trade-down has an address: inside beef, into ground.

The reports describe trade-down as a behavior — shoppers seeking value, switching cuts, changing stores. The loyalty data locates it precisely: ground beef is the department's third-largest category, nearly as large as pork, sausage, and turkey combined. Shoppers under price pressure are not abandoning beef; they are managing spend within it. That distinction matters enormously, because within-category trade-down is recoverable — the household is still at your meat case, still buying beef, and still reachable with a premium-cut offer timed to the occasions when they trade back up. Category exit is a loss; internal trade-down is a targeting list.

THE HOUSEHOLD VIEW

What else the loyalty card reveals

SHOPPER BASE

The shopper base is the department's most underrated asset.

Unique meat shoppers barely move month to month — the base stays sticky even through sharp price increases. And the single busiest shopper month of the year is January: the New Year protein-first effect, visible in actual transactions rather than survey claims. The GLP-1 and protein-culture demand the reports describe has a timestamp in the loyalty data.

BASKET CLOCK

Basket behavior runs on a readable clock.

The typical meat trip is just over two packages at around $18. December baskets spike above $20 — the holiday roast-and-whole-bird premium, the year's peak — while March hits the trough with the fewest packages per trip as households enter post-holiday value mode. Current-year baskets run slightly above the same months a year earlier: more dollars, not more packages. Promotion calendars that ignore this clock discount the wrong months.

TWO MISSIONS

The dual-track shopper is two different households, not one conflicted one.

Value-added and ready-to-cook convenience formats form a meaningful, fast-growing segment at the same time as a distinct organic and clean-label premium cohort keeps spending. They are not cannibalizing each other; they are different households on different missions — which is precisely why blanket meat promotion misfires and household-level targeting does not.

THE PLAYBOOK

From findings to offers

Every finding above converts directly into a personalization play, executable through loyalty data rather than blanket markdown.

Win back the internal trade-down	Identify households that shifted from premium beef cuts to ground, and serve premium-cut offers timed to the occasions when they historically trade up — weekends, holidays, paydays. They never left; invite them back up.
Protect the volume engine	Chicken's unit dominance makes it the department's traffic anchor. Hold KVI price integrity and feature depth even while beef carries the dollar line, and attach full-price center-store items — marinades, sauces, high-protein sides — to chicken's enormous trip volume.
Serve the two tracks separately	Personalize value-added and ready-to-cook offers to high-frequency, lower-basket convenience households; serve premium and organic cuts to the high-basket cohort ahead of weekends — at full price, where they already buy.
Build the protein-first segment	Repeat buyers of chicken breast, ground beef, and turkey form an identifiable protein-maximizing cohort — the household-level expression of the GLP-1 and fitness trends — and the meat department's best retail media audience for protein CPGs seeking verified, high-frequency exposure.
Time the calendar to the basket clock	Lean premium in December when baskets peak; lean value and multi-buy depth in the post-holiday trough when packages per trip bottom out. The data already knows when each household is in which mode.

THE BOTTOM LINE

The industry's data tells you protein is winning. Your loyalty data tells you who.

The 2026 Power of Meat report and the coverage around it describe a category in genuinely strong health, and nothing in American grocery retailers' loyalty data contradicts the record. What the household view adds is resolution.

The volume boom is unevenly distributed and every grocer should know which side of the average they are on; the protein mix is shifting faster in the cart than at the register; and the trade-down everyone is worried about has a precise address and a win-back play.

Which of your households are driving it, which are quietly buying one fewer package per trip, which traded from ribeye to ground last quarter, and exactly what offer brings them back.

At Birdzi, that's the story we help American grocers read, and act on, every week.

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Ron Bonacci brings more than 25 years of grocery retail and marketing leadership to Birdzi, with experience spanning loyalty, customer strategy, merchandising, ecommerce, advertising, and CPG. Throughout his career, Bonacci has worked at the intersection of customer behavior and business performance, using data to understand not just what is happening, but why. As VP of Loyalty and Retail Insights, he brings that retailer perspective to Birdzi, uncovering the story in the data and helping translate it into meaningful insights for our team, clients, and the industry.