



# Monthly Updates

## Trends to Know

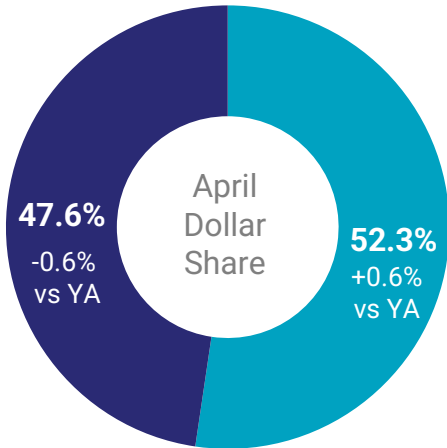
APRIL 2026



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## Trends in Two Minutes



■ Grocery ■ Perishables

In April, grocery continued to hold the largest share of dollars over perishables. Grocery also led in dollar sales percent growth, while perishables declined the least in unit sales and reduction in price per unit.

**Shopper concerns continued to rise, with consumers remaining highly price-pressured and cautious, Circana’s shopper survey showed.**

**87%**

of shopper perceived grocery prices as higher year over year  
**+6 pts vs. Mar 2026**

**52%**

of households said they are extremely concerned about food cost inflation  
**+5 pts vs. Feb 2026**

**27%**

of households said their plans for Memorial Day weekend include barbequing/cooking on an outdoor grill  
**-4 pts vs. 2025 intentions**

### Perishables Performance

April sales, which included Easter, had mixed performance across the perishables departments. The fresh meat department continued to lead in dollar sales, with strong dollar growth but a slight decline in unit sales versus last month. Produce also continued to decline in units, a slight dip from last month. While dairy dollars continued to decrease in 2026, unit sales are now flat, also a decrease from last month. Deli continued with strong performance, but it also had a reduction over last month. Bakery and seafood, on the other hand, improved or held strong versus last month’s performance in both units and dollars.

### Perimeter Overview

April 2026

Departments	\$ Sales	\$ Sales vs. YA	Unit Sales vs. YA
Meat Department	\$8.7B	3.2%	0.1%
Produce Department	\$7.7B	0.9%	-0.6%
Dairy Aisle	\$6.6B	-9.2%	0.0%
Deli Department	\$4.2B	0.8%	0.1%
Bakery Department	\$3.7B	-1.2%	-3.5%
Seafood Department	\$678.8M	0.6%	-4.0%

Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## DAIRY, DELI, BAKERY SNAPSHOT

**Dairy and deli continued to outpace total food and beverage in unit sales growth in April 2026.**

April performance was strong in dairy and deli unit sales, while bakery units continued to decline but saw an improvement, likely due to holiday sales. Deli continued to be a highlight, with dollars up nearly 1% versus last year and units holding about flat. Dairy struggled with dollar sales performance, due to large price declines, but units held flat. For the first time in 2026, bakery performance improved over last month in both dollars and units, but it continued to decline overall versus last year. The last 52-week performance followed similar trends for all, but bakery grew dollars 0.8% versus last year. The average price per unit for dairy declined more than 9% in April, while it increased 0.7% in deli and 2.4% in bakery.

### April 2026

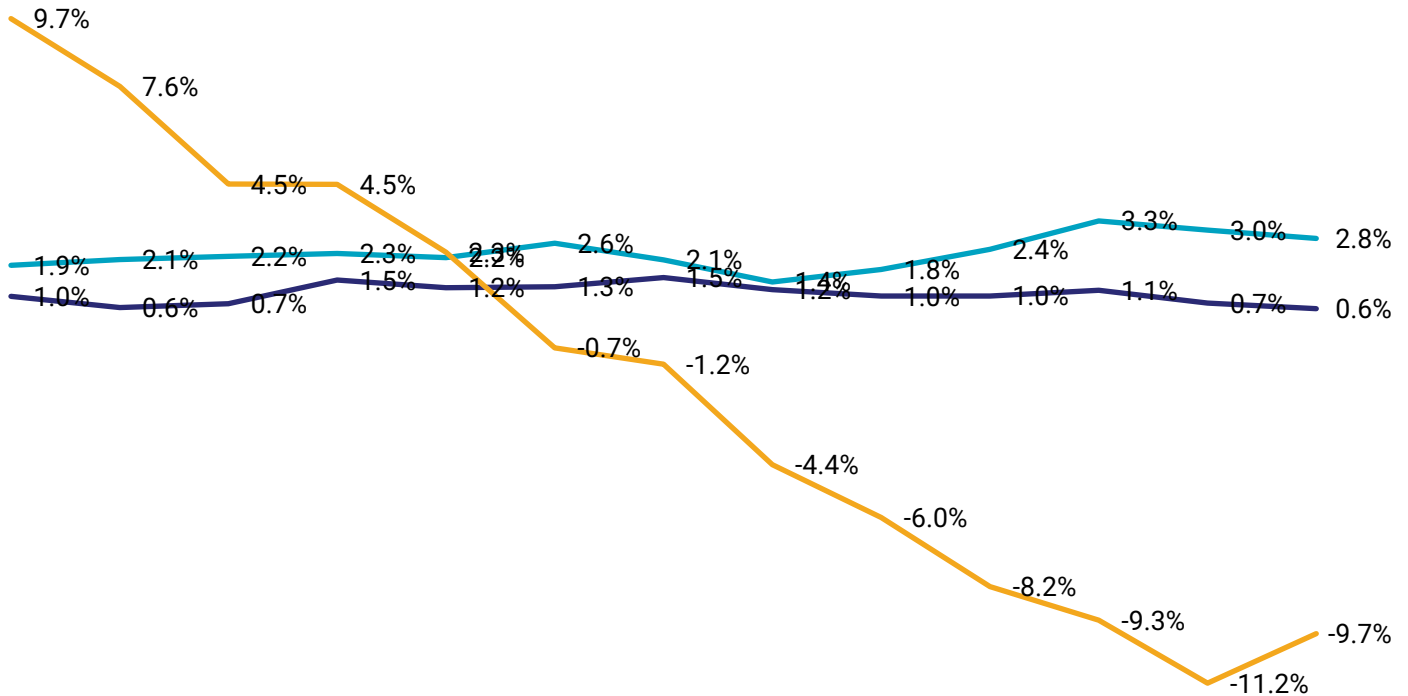
Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
<b>Total Food &amp; Beverage</b>	<b>\$74.1B</b>	<b>0.1%</b>	<b>17.B</b>	<b>-1.9%</b>
Dairy	\$6.6B	-9.2%	1.8B	0.0%
Deli	\$4.2B	0.8%	671.M	0.1%
Bakery	\$3.7B	-1.2%	943.4M	-3.5%

### Latest 52WE 4/26/26

Product	Dollar Sales	Dollar Sales % Change vs. YA	Unit Sales	Unit Sales % Change vs. YA
<b>Total Food &amp; Beverage</b>	<b>\$964.7B</b>	<b>2.7%</b>	<b>223.5B</b>	<b>0.3%</b>
Dairy	\$89.3B	-1.2%	23.6B	1.4%
Deli	\$56.1B	3.0%	8.9B	1.9%
Bakery	\$49.4B	0.8%	12.7B	-1.5%

## Dairy, Deli, and Bakery

Price per unit % change vs. YA



Rolling 4 Weeks Ending 05-18-25   Rolling 4 Weeks Ending 06-15-25   Rolling 4 Weeks Ending 07-13-25   Rolling 4 Weeks Ending 08-10-25   Rolling 4 Weeks Ending 09-07-25   Rolling 4 Weeks Ending 10-05-25   Rolling 4 Weeks Ending 11-02-25   Rolling 4 Weeks Ending 11-30-25   Rolling 4 Weeks Ending 12-28-25   Rolling 4 Weeks Ending 01-25-26   Rolling 4 Weeks Ending 02-22-26   Rolling 4 Weeks Ending 03-22-26   Rolling 4 Weeks Ending 04-19-26

— DEPT-DELI   — DEPT-BAKERY   — AISLE-DAIRY

Time Period	Price/unit	Change vs. YA	Change vs. 3YA
<b>Total Dairy April 2026</b>	<b>\$3.68</b>	<b>-9.2%</b>	<b>0.2%</b>
Total Dairy 52WE 4/26/26	\$3.79	-2.5%	2.8%
<b>Total Deli April 2026</b>	<b>\$6.27</b>	<b>0.7%</b>	<b>1.5%</b>
Total Deli 52WE 4/26/26	\$6.27	1.0%	2.9%
<b>Total Bakery April 2026</b>	<b>\$3.96</b>	<b>2.4%</b>	<b>5.1%</b>
Total Bakery 52WE 4/26/26	\$3.91	2.3%	7.9%

Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## DAIRY SALES

### DAIRY

In April, total dairy struggled in dollar sales due to large price decreases while units held flat, a decrease from last month despite the holiday. At the category level, dollar growth ranged from over 14% for cottage cheese to a decline of over 42% for refrigerated eggs. Overall, sales were mixed in April for many key categories. Despite the holiday, eggs only grew 2% in units. The top two categories by dollar sales, milk and natural cheese, continued to be challenged, both declining in units. The top unit-growth drivers for April included cottage cheese, rfg desserts, yogurt, rfg eggs, rfg whipped toppings & cream/creamers.



#### April 2026

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Dairy</b>	<b>\$6.6B</b>	<b>-9.2%</b>	<b>0.0%</b>
Milk	\$1.5B	0.7%	-0.2%
Dairy Natural Cheese	\$1.1B	-5.3%	-0.5%
Yogurt	\$1.1B	9.5%	2.6%
Rfg Eggs	\$854.1M	-42.5%	2.0%
Rfg Creams/Creamers	\$523.3M	0.4%	0.3%
Butter/Margarine/Spreads	\$514.7M	-12.1%	-7.3%
Cream Cheese	\$206.7M	-5.9%	-3.4%
Cottage Cheese	\$181.7M	14.5%	6.6%
Rfg Whipped Toppings	\$179.7M	-3.8%	0.9%
Dairy Processed Cheese	\$166.2M	-5.8%	-4.8%
Sour Cream	\$142.2M	-1.8%	-3.2%
Rfg Desserts	\$99.8M	5.7%	3.0%
Rfg Cheese Snack Kits	\$22.8M	-8.0%	-4.1%
Dairy Alternative Cheese	\$8.7M	-8.7%	-6.6%

#### 52WE 4/26/26

Dairy	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Dairy</b>	<b>\$89.3B</b>	<b>-1.2%</b>	<b>1.4%</b>
Milk	\$19.4B	1.7%	0.1%
Dairy Natural Cheese	\$15.5B	-1.2%	0.7%
Yogurt	\$13.4B	-16.1%	1.7%
Rfg Eggs	\$13.2B	12.5%	4.7%
Rfg Creams/Creamers	\$7.3B	-4.2%	-1.2%
Butter/Margarine/Spreads	\$7.0B	1.8%	1.5%
Cream Cheese	\$2.9B	-3.1%	-0.2%
Cottage Cheese	\$2.6B	1.7%	4.9%
Rfg Whipped Toppings	\$2.3B	-6.0%	-4.8%
Dairy Processed Cheese	\$2.1B	17.3%	12.0%
Sour Cream	\$1.9B	0.8%	-0.7%
Rfg Desserts	\$1.2B	-0.9%	-6.8%
Rfg Cheese Snack Kits	\$292.7M	-8.6%	-5.8%
Dairy Alternative Cheese	\$122.5M	-6.9%	-7.7%

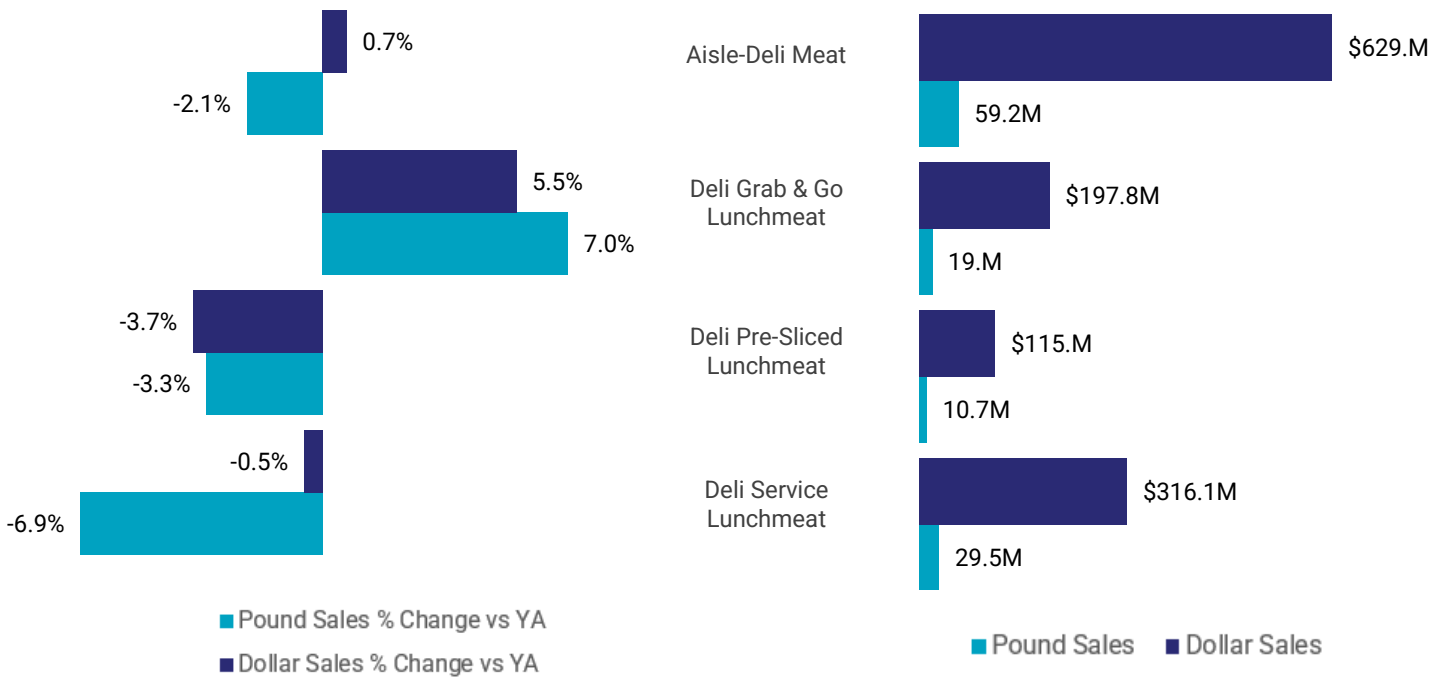
Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## DELI SALES

### DELI MEAT

Deli meat sales totaled \$629 million in April 2026, a decline from last month despite the Easter holiday. Dollars grew versus last year while pounds continued to decline. Grab and go continued to be the shining light for deli meat, growing in both dollars and units. Despite overall declines, pre-sliced lunchmeat was the only deli meat to grow in pounds versus last year, likely thanks to holiday sales. Service lunchmeat struggled in April, declining in both dollars and pounds. While deli meat had a strong performance and improved in some areas, we will need to monitor consumers' choices throughout 2026.

**Deli Meat Overview**  
Dollars and Pounds, 4WE 4/26/26



### April 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pound Sales	Pound Sales % Change vs. YA
Aisle Deli Meat	\$629.0M	0.7%	59.2M	-2.1%
Deli Grab & Go Lunchmeat	\$197.8M	5.5%	19.0M	7.0%
Deli Pre-sliced Lunchmeat	\$115.0M	-3.7%	10.7M	-3.3%
Deli Service Lunchmeat	\$316.1M	-0.5%	29.5M	-6.9%

Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## DELI SALES

### PACKAGED LUNCHEAT – MEAT DEPARTMENT

Packaged lunchmeat (included in meat department sales) reached over \$505 million in April 2026. Packaged lunchmeat improved slightly over last month’s performance in pounds but continued to decline overall despite the holiday. Declines exceeded total deli meats in April across dollars and pounds. We will need to continue monitoring performance changes in 2026 to understand consumer demand and choices.

#### April 2026

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$505.1M	-3.0%	-7.0%

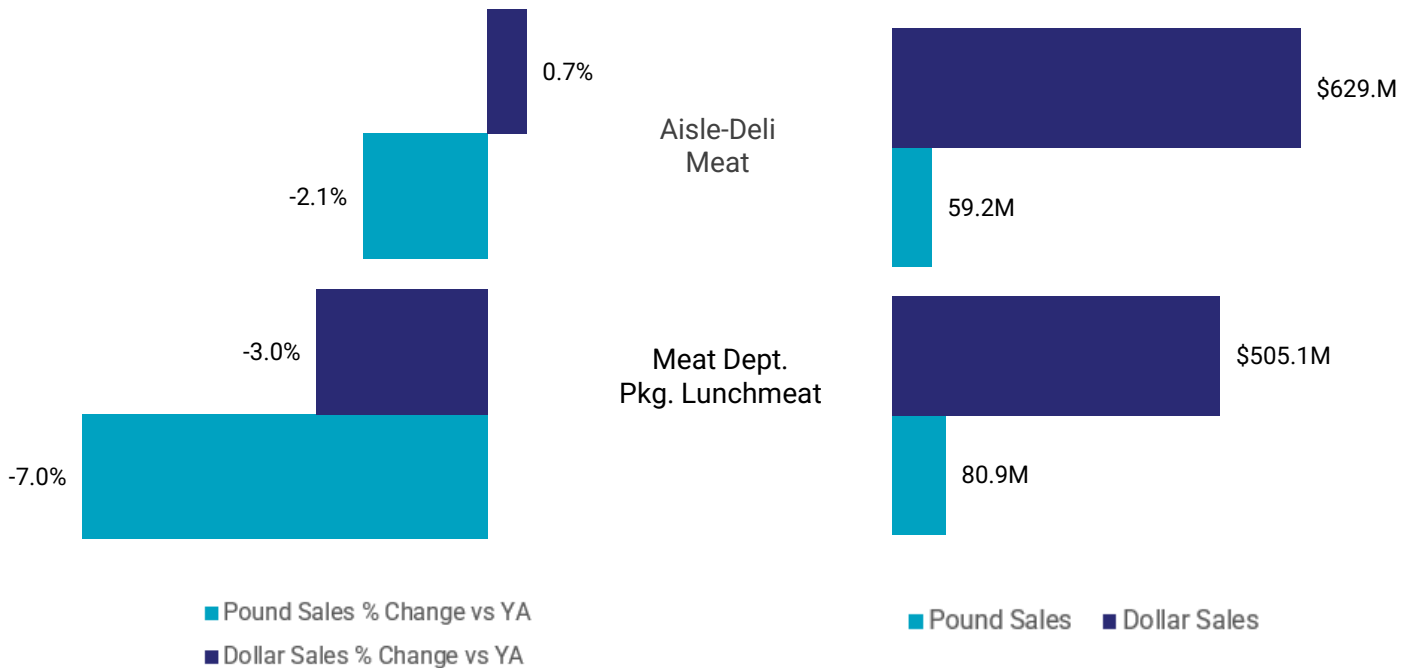


#### 52WE 4/26/26

Product	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
Meat Department Pkg. Lunchmeat	\$6.9B	-1.5%	-4.4%

### Deli vs. Packaged Lunchmeat Overview

Dollars and Pounds, 4WE 4/26/26



Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## DELI SALES

### DELI ENTERTAINING/DELI PREPARED

#### Deli Entertaining

Deli entertaining sales in April declined in dollars and units versus last month, despite the Easter holiday. Pickles/relish continued to drive strong dollar and unit growth, improving in unit sales versus last month. April was a growth driver for holiday meals, growing strong in dollars and units. Dips and sauces, trays, and spreads struggled in April, declining in dollars and units.

#### April 2026

#### 52WE 4/26/26

Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Entertaining	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Deli Entertaining</b>	<b>\$487.2M</b>	<b>-1.3%</b>	<b>-1.0%</b>	<b>Deli Entertaining</b>	<b>\$6.5B</b>	<b>1.3%</b>	<b>0.8%</b>
Dips and Sauces	\$248.M	-2.3%	-1.7%	Dips and Sauces	\$3.4B	1.4%	0.3%
Trays	\$87.2M	-2.3%	-2.0%	Trays	\$1.2B	1.0%	6.5%
Spreads	\$79.9M	-5.0%	-3.9%	Spreads	\$1.1B	-0.8%	-1.6%
Pickles/Relish	\$71.1M	8.5%	6.5%	Pickles/Relish	\$846.9M	3.7%	2.3%
Holiday Meals	\$902,808	11.1%	3.9%	Holiday Meals	\$31.2M	11.1%	1.9%

#### Deli Prepared

Deli prepared continued to be a highlight in deli, growing more than 1% in dollars and units in April versus last year, a slight dip from last month despite the holiday. Unit drivers in April included deli combo meals, appetizers, pizza, prepared meats, entrees, and salads, showcasing the overall consumer need for convenience retail.

#### April 2026

#### 52WE 4/26/26

Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Deli Prepared	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Deli Prepared</b>	<b>\$2.4B</b>	<b>1.5%</b>	<b>1.0%</b>	<b>Deli Prepared</b>	<b>\$31.8B</b>	<b>3.7%</b>	<b>3.2%</b>
Entrees	\$727.9M	5.0%	2.5%	Entrees	\$9.3B	7.0%	5.2%
Prepared Meats	\$493.3M	1.2%	2.7%	Prepared Meats	\$6.5B	1.3%	2.1%
Sandwiches	\$303.2M	-0.6%	0.6%	Sandwiches	\$3.9B	2.4%	6.0%
Salads	\$295.4M	-0.4%	1.7%	Salads	\$3.8B	2.2%	0.5%
Appetizers	\$194.4M	5.8%	5.3%	Appetizers	\$2.5B	7.8%	7.1%
Side Dishes	\$162.3M	-6.2%	-8.6%	Side Dishes	\$2.3B	1.0%	1.4%
Pizza	\$90.4M	0.7%	2.7%	Soups & Chili	\$1.5B	5.3%	2.5%
Soups & Chili	\$90.0M	-1.4%	-3.3%	Pizza	\$1.2B	0.1%	-1.2%
Breakfast	\$43.4M	-5.4%	-0.9%	Breakfast	\$573.1M	-1.1%	-1.9%
Combo Meals	\$12.6M	5.4%	7.7%	Combo Meals	\$162.5M	6.6%	7.8%
Desserts	\$6.9M	-5.8%	-10.1%	Desserts	\$89.5M	-7.7%	-11.2%

## DELI SALES

### DELI CHEESE

**Deli cheese declined in dollars and pounds in April.** Spotlights in the month included specialty and grab and go, which both grew in dollars and pounds versus last year. Grab and go specifically had strong performance in April, likely due to the holiday. On the other hand, service and pre-sliced continued to decline across dollars and pounds.

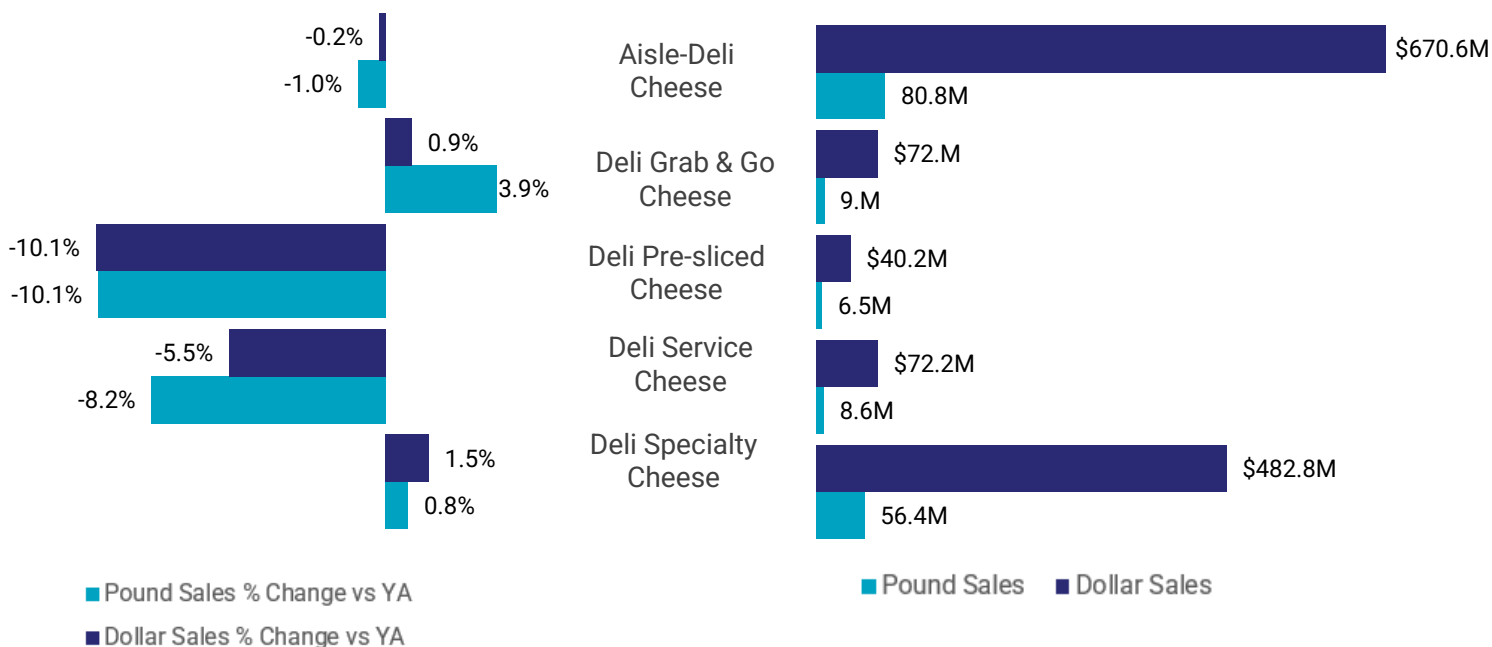


April 2026

52WE 4/26/26

Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA	Deli Cheese	\$ Sales	\$ Sales % Change vs. YA	Pounds vs. YA
<b>Total Deli Cheese</b>	<b>\$670.6M</b>	<b>-0.2%</b>	<b>-1.0%</b>	<b>Total Deli Cheese</b>	<b>\$9.1B</b>	<b>3.5%</b>	<b>2.8%</b>
Specialty	\$482.8M	1.5%	0.8%	Specialty	\$6.5B	5.3%	4.7%
Service	\$72.2M	-5.5%	-8.2%	Service	\$1.0B	-1.7%	-4.4%
Grab & Go	\$72.0M	0.9%	3.9%	Grab & Go	\$971.5M	1.3%	0.9%
Pre-sliced	\$40.2M	-10.1%	-10.1%	Pre-sliced	\$579.9M	-1.0%	0.9%

**Deli Cheese Overview**  
Dollars and Volume, 4WE 4/26/26



Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## BAKERY SALES

### BAKERY

Dollar sales were  
**\$3.7B**

in April 2026



Bakery department sales, covering fixed and random weight items as well as the bakery aisle and the fresh perimeter bakery, totaled \$3.7 billion in April, declining from last month. Both dollars and units declined from last year, despite the holiday in April 2026. Perimeter bakery continued to pace ahead of total bakery unit performance in April versus last year, while dollar decline paced with total bakery. Center-store bakery, thought still declining, improved over last month in dollars and units, possibly a shift from the Easter holiday.

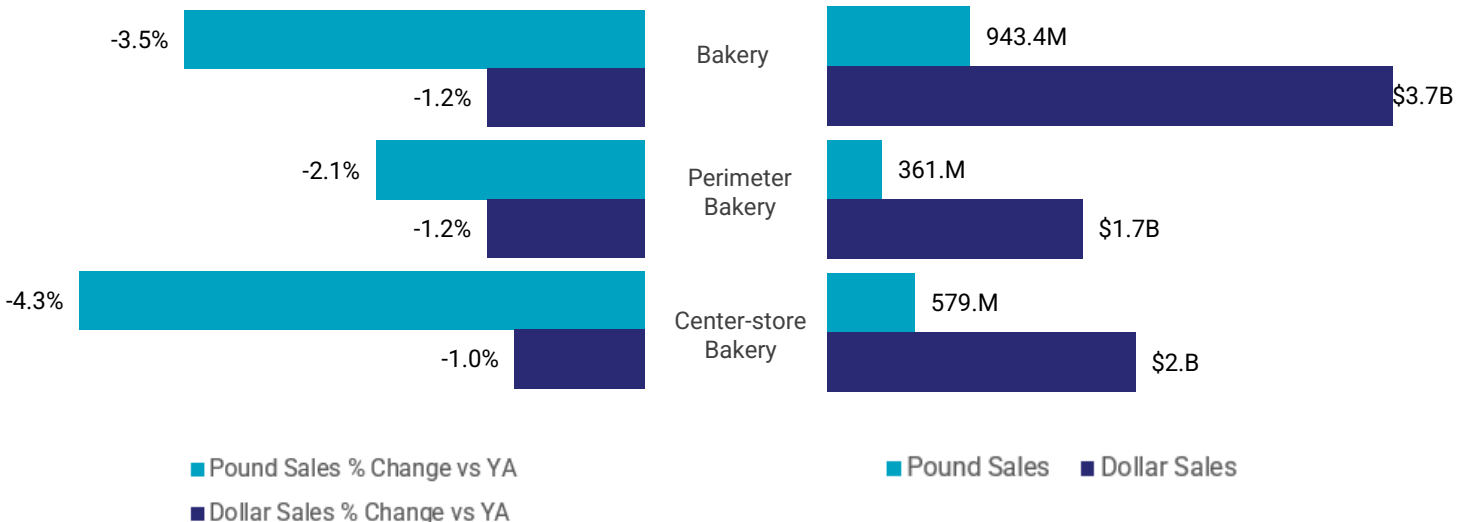
#### April 2026

#### 52WE 4/26/26

Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Total Bakery</b>	<b>\$3.7B</b>	<b>-1.2%</b>	<b>-3.5%</b>	<b>Total Bakery</b>	<b>\$49.4B</b>	<b>0.8%</b>	<b>-1.5%</b>
Center-store Bakery	\$2.0B	-1.0%	-4.3%	Center-store Bakery	\$26.9B	-0.7%	-2.7%
Perimeter Bakery	\$1.7B	-1.2%	-2.1%	Perimeter Bakery	\$22.4B	2.7%	0.7%

### Bakery Overview

Dollars and Volume, 4WE 4/26/26



Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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## BAKERY SALES

### CENTER AISLE BAKERY

#### Center Aisle Bakery

Baked goods items found in the aisle, or center-store area, declined 1% in dollars and over 4% in units in April 2026 versus last year. But this was an improvement compared to the previous month, likely due to the Easter holiday. The leading aisle for center-store bakery in dollar sales and performance continued to be breads, but it is declining in dollars and units. The only categories leading growth across dollars and units this month included center-store wraps/flatbreads and bagels/bialys, showcasing the balance of consumer desire for health and indulgence. Center-store cakes declined the most, dropping over 14% in dollars and nearly 22% in units.

#### April 2026

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Center Store Bakery</b>	<b>\$2.0B</b>	<b>-1.0%</b>	<b>-4.3%</b>
<b>Breads &amp; Rolls</b>	<b>\$1.5B</b>	<b>0.3%</b>	<b>-2.3%</b>
<b>Desserts/Sweet Snacks</b>	<b>\$272.2M</b>	<b>-6.4%</b>	<b>-11.7%</b>
<b>Morning Bakery</b>	<b>\$217.1M</b>	<b>-2.7%</b>	<b>-7.7%</b>
Breads	\$860.0M	-1.1%	-3.5%
Buns & Rolls	\$454.9M	1.0%	-0.8%
Bagels/Bialys	\$126.7M	4.0%	0.9%
Snack Cakes	\$101.6M	-9.0%	-14.2%
Cookies	\$85.8M	0.4%	-4.4%
Donuts	\$83.1M	-1.1%	-7.1%
Muffins	\$77.3M	-7.6%	-13.0%
English Muffins	\$66.6M	2.0%	-3.4%
Pastry/Danish/Coffee Cakes	\$56.7M	2.1%	-2.4%
Brownies/Squares/Bars	\$35.9M	-6.2%	-13.2%
Cakes	\$29.1M	-14.1%	-21.8%
Wraps/Flatbreads	\$26.4M	14.1%	5.7%
Pies	\$19.9M	-7.9%	-10.2%
Croissants	\$12.5M	0.3%	-5.5%

#### 52WE 4/26/26

Center Aisle	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
<b>Center Store Bakery</b>	<b>\$26.9B</b>	<b>-0.7%</b>	<b>-2.7%</b>
<b>Breads &amp; Rolls</b>	<b>\$20.3B</b>	<b>-1.0%</b>	<b>-2.2%</b>
<b>Desserts/Sweet Snacks</b>	<b>\$11.4B</b>	<b>-1.8%</b>	<b>-3.1%</b>
<b>Morning Bakery</b>	<b>\$5.9B</b>	<b>-0.5%</b>	<b>-1.4%</b>
Breads	\$3.8B	0.0%	-5.3%
Buns & Rolls	\$2.8B	0.1%	-2.8%
Bagels/Bialys	\$1.6B	1.3%	0.4%
Snack Cakes	\$1.5B	0.2%	-4.5%
Cookies	\$1.1B	6.0%	-2.7%
Donuts	\$1.1B	1.6%	-1.7%
Muffins	\$1.0B	-2.4%	-6.1%
English Muffins	\$879.9M	-1.0%	-3.1%
Pastry/Danish/Coffee Cakes	\$722.7M	1.5%	-0.9%
Brownies/Squares/Bars	\$511.2M	-2.1%	-6.8%
Cakes	\$392.1M	-8.0%	-11.1%
Wraps/Flatbreads	\$317.8M	8.8%	5.7%
Pies	\$277.0M	-6.6%	-6.6%
Croissants	\$156.0M	5.8%	2.8%

## BAKERY SALES

### PERIMETER BAKERY

#### Perimeter Bakery (including fixed and random weight)

Perimeter bakery performance declined versus last month, falling over 1% in dollars and more than 2% in units versus last year. From the topline, perimeter breads & rolls continued to drive dollar growth but declined the most in units, while perimeter desserts declined the least in units versus last year. Morning bakery was a spotlight this month, still seeing overall declines but improved performance over last month, like due to the holiday. Perimeter bakery item unit drivers included perimeter brownies/squares/ bars, up nearly 25%, as well as muffins, tortillas/wraps/flatbreads, and cookies, further highlighting the trend for consumer indulgence balance.

April 2026

52WE 4/26/26

Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Perimeter Bakery	\$1.7B	-1.2%	-2.1%	Perimeter Bakery	\$22.4B	2.7%	0.7%
Desserts/Sweet Snacks	\$870.7M	-2.3%	-1.1%	Desserts/Sweet Snacks	\$11.7B	2.3%	0.7%
Morning Bakery	\$436.6M	-0.2%	-1.2%	Morning Bakery	\$5.7B	4.3%	3.6%
Breads & Rolls	\$379.6M	0.2%	-3.9%	Breads & Rolls	\$5.0B	2.1%	-1.9%
Cakes	\$507.2M	-2.7%	-2.9%	Cakes	\$6.5B	3.4%	2.7%
Cookies	\$244.8M	-1.8%	0.4%	Cookies	\$3.3B	1.6%	-2.2%
Pastry/Danish/ Coffee Cakes	\$159.4M	-3.8%	-5.3%	Pastry/Danish/ Coffee Cakes	\$2.1B	3.8%	3.3%
Donuts	\$146.2M	1.4%	-1.3%	Donuts	\$1.9B	2.8%	2.0%
Breads	\$140.1M	8.0%	-4.1%	Breads	\$1.8B	6.2%	-2.6%
Muffins	\$131.1M	2.8%	4.5%	Muffins	\$1.7B	6.7%	6.8%
Buns & Rolls	\$71.3M	-9.1%	-5.1%	Pies	\$1.3B	-1.3%	-0.6%
Croissants	\$93.7M	-3.8%	-4.6%	Buns & Rolls	\$1.3B	-3.1%	-3.0%
Pies	\$81.2M	-2.6%	-1.9%	Croissants	\$1.1B	3.1%	1.9%
Brownies/Squares/ Bars	\$40.7M	24.0%	24.7%	Brownies/Squares/ Bars	\$488.6M	11.1%	7.1%
Tortillas/Wraps/ Flatbreads	\$29.9M	-15.2%	-8.0%	Bagels/Bialys	\$452.3M	-3.0%	-2.8%
Bagels/Bialys	\$34.2M	4.4%	3.3%	Tortillas/Wraps/ Flatbreads	\$435.7M	3.4%	1.5%
Specialty Desserts	\$6.8M	-27.4%	-11.4%	Specialty Desserts	\$104.3M	-26.1%	-3.7%

Source: Circana, Integrated Fresh, Total U.S. MULO+, April 2026  
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Want to know more? Circana can go beyond this monthly report. Scan the QR code.



IDDBA members who are new clients to Circana will receive a discount of 10% for their first purchase.\*

**Date ranges:**

2021: 52 weeks ending 1/2/2022  
2022: 52 weeks ending 1/1/2023  
2023: 52 weeks ending 12/31/2023  
2024: 52 weeks ending 12/29/2024

Q1 2025: 13 weeks ending 3/30/2025  
Q2 2025: 13 weeks ending 6/29/2025  
Q3 2025: 13 weeks ending 9/28/2025  
Q4 2025: 13 weeks ending 12/28/2025  
April 2026: 4 weeks ending 4/26/2026



\*10% discount up to \$3,000 for first syndicated purchase for verified IDDBA members

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