

THE PROTEIN PROFILE

The 2024 Primer for Protein Trends & Tips



Protein**PROMISE**

2024

A Message from Our President

At Cargill, our North American Protein team is dedicated to understanding the global food production and consumption trends at the broadest level. This report shares a comprehensive look at the biggest trends and predictions in protein for 2024 and beyond.

We dove deep into consumer mindsets, desires and behaviors, along with the latest in culinary technology, and filtered it all through the lens of protein — poultry and meat especially, but also alternative proteins and seafood. These findings will continue to inform the many innovations we're piloting for the future of protein, for our customers, partners and consumers alike.

As the most important nutrient in consumers' diets, the power of protein can't be overstated. These trends all point in a clear direction:

People want and need protein solutions that are right-sized, simple, globally inspired and affordable.

LESS IS MORE

With the **average household size shrinking** and becoming the new normal, one-to-two person households want smaller packages of protein to avoid unnecessary food waste and control overall costs. But that doesn't necessarily mean that one size fits all, or that only smaller, single-meal servings are the way forward. Whether buying protein for one meal or purchasing larger quantities and freezing for later use, these households shop, cook and store food differently.

SIMPLIFY MY LIFE

The **time crunch** continues to be real, and more people are reaching for protein and meal solutions that simplify their lives, with **technology streamlining** the entire food experience for consumers. From offering order-ahead capabilities in foodservice to online grocery shopping, **simple is better.**

CONNECTING CULTURES & CUISINES

People's palates increasingly crave **more diverse and globally influenced flavors.** As Gen Z steps into the kitchen, they not only seek comfort in the flavors of diverse cultures but are also exploring and mashing up global cuisines and influences in new ways, including for protein-centric meals and snacks.

REDEFINING VALUE

Pricing is impactful enough that it's another trend on its own. This is playing out in some interesting ways: People are **choosing premium items** to prepare at home, reframing price on their terms. But, they're also **prioritizing value** by choosing simpler meals or smaller sizes, while grocery shopping and dining. These shifts reinforce everyone is defining "value" on their own terms.

From our seat at the heart of the supply chain, our North American Protein business has a unique perspective on delivering and innovating protein with purpose. Along with serving as a strategic partner for leaders around the world, we support the production of the best protein for people and the planet. We're excited to share these protein insights and continue to deliver protein for the world – not just for today, but for generations to come.

Sincerely,



**Hans Kabat, President,
Cargill's North American Protein Business**

Four Key Trends

1

LESS IS MORE: Households are gradually shrinking, changing the ways we shop, prep and cook.

64%

of U.S. households are one or two people up from 46% in 1970¹



37%

increase in air fryer use to prepare meat & poultry since 2019²



2

SIMPLIFY MY LIFE: With more meals consumed at home – whether home cooked or takeout – consumers increasingly prefer easier, faster mealtimes. Technology is helping meet this desire for a simpler experience.

15%

of all meal occasions today are heat-and-eat representing 1-in-7³



5 billion

increase in orders for digital foodservice since 2019 161% increase⁴



3

CONNECTING CULTURES AND CUISINES: Multicultural consumer segments are growing, driving interest in globally inspired foods (especially Mexican and Latin cuisines). Culinary chefs are creating new food experiences and expanding menus in a bold new way.

58%

of Gen Z and 48% of Millennials have eaten globally inspired food in the past week⁵



61%

of consumers are interested in Latin cuisine for the variety of flavors its recipes inspire⁶



4

REDEFINING VALUE: The meaning of value depends on each consumer's lifestyle. Some trade down in foodservice, while others use premium ingredients to recreate a restaurant experience at-home. Still others save on groceries with private labels or value retailers.

60%

increase in private label preference since 2021⁷



60%

say they are eating out less often to manage expenses⁷



The background is a solid green color with a repeating pattern of white line-art icons representing various food items: fish, cow, chicken, mushroom, banana, and leafy greens.

TREND 1

**LESS
IS MORE**

1

TREND 1: LESS IS MORE

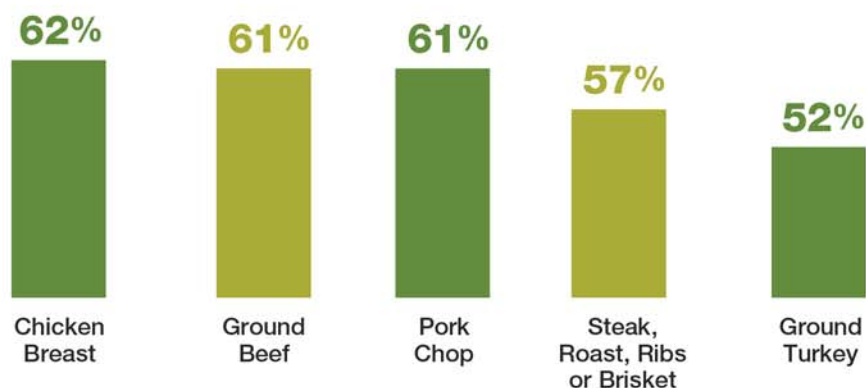


- ✓ **The typical household is getting smaller.** One-person (29%) and two-person households (35%) combined represent nearly two-thirds of all U.S. households.¹ This shift means smaller grocery lists, packaging sizes and even appliances — with implications for the protein industry.
- ✓ **A third of dinners at home are eaten alone** — a sizable opportunity for single-serve dinner options. Smaller households have shorter grocery lists, because the ingredients for a two-person meal look different than for a family of four. Because of this, smaller packages of meat and poultry often fit their needs.⁸
- ✓ **Meals that freeze and reheat easily are key.** Single-person households typically make meals with three to four servings, then eat or freeze the leftovers. These one-person households sometimes lack motivation to cook and don't want to bother with major prep or clean-up.



Most Meat Purchases Involve Freezing for Future Use

Percent of people who freeze foods “most” or “every” time they buy them⁵



TREND 1: LESS IS MORE



Air Fryers & Pressure Cookers Take Center Stage

For smaller households, preheating and using an entire oven can feel like overkill for what recipes are calling for. Appliances like air fryers and pressure cookers are game-changers for quick, smaller-sized meals, especially for preparing protein.

To Prepare Meat and Poultry²

76%

Use an air fryer,
up from 39% in 2019



71%

Use a pressure
cooker



43%

Use a sous vide
method



Growth in Grills

Grilling can be a fun way to mix up mealtime for smaller households. Families often make a large batch of protein to use in lunches and dinners throughout the week. **Steaks and burgers dominate the grilling scene**, but larger cuts, like beef brisket and whole chicken, fit best with smoking.

#2

Appliance:
after microwaves, grills
are the highest in
household ownership⁹



51%

Of grill owners
smoke meats
using the grill¹⁰



75%

Use their grill
all year long¹⁰



34%

Of grill owners
plan to grill more
in the next year¹⁰



TREND 1: LESS IS MORE



Real World Impact

For Retailers

It's not just about ovens and microwaves — look to include additional cooking instructions and meal inspiration for grills, air fryers and pressure cookers, or as part of recipe content online.

For Brands

Most protein purchases involve some freezing for future use, so utilizing freezer-ready packaging takes away an extra step for consumers. At the same time, prioritize right-size packaging — think of one-person and two-person households when deciding how to package protein.

For Consumers

An air fryer works well for veggies and main dishes alike. Try making roasted carrots, broccoli or cauliflower, as well as loaded nachos, salmon, grilled cheese, baked sandwiches and pita pizza.



Our Experts' Take

Many meal solutions are designed with families in mind but given the majority of households are made up of one to two people, it's imperative that we create solutions that best suit their needs.

Cory Lommel,
Director of Consumer
Insights, Cargill

Freezing meat is a great way to make life easier and smartly meal plan, but you must freeze it right.

Freeze meat quickly to maintain quality and in serving portions for easier thawing. Using a vacuum sealer is a perfect way to prevent drying out and freezer burn.

Chef Janet Bourbon,
Cargill Protein

TREND 2

SIMPLIFY MY LIFE

2

TREND 2: SIMPLIFY MY LIFE



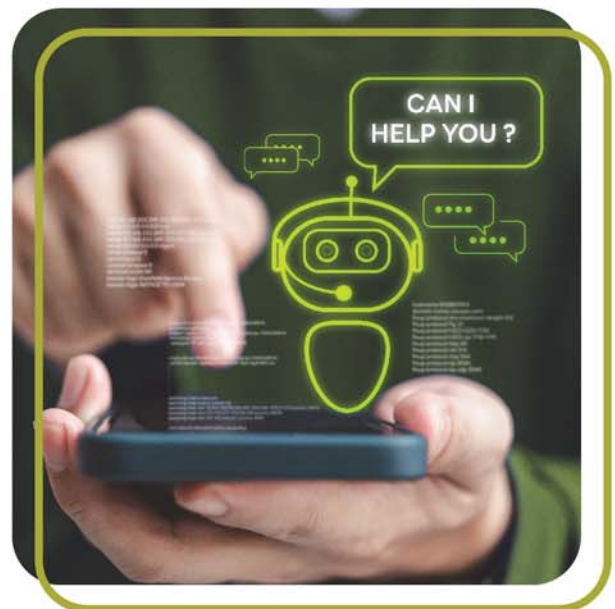
- ✔ **Simplify my life- it's the mantra of 2024.** As consumers continue to shift to pre-pandemic rhythms — return to in-office work, school, activities — they are, once again, pressed for time.
- ✔ **Consumers want meals & protein products that prioritize convenience and provide shortcuts,** instead of difficult, time-intensive cooking projects. This mindset affects every aspect of mealtime: meal planning, grocery shopping, product selection, food storage, meal prep, eating and clean-up.



Transforming Business with Technology

New technology is making the protein sector more agile across retail, foodservice and food manufacturing. **AI and automation are speeding order processing**, fueling recipe inspiration for marketing and creating a more efficient digital supply chain. At retail, chat AI now gives consumers custom recommendations.

Organizations and protein brands that approach the use of technology with a customer-driven mindset will win in the technology space and succeed in **creating shopping & dining experiences that are engaging and seamless.**



11. Circana, National Eating Trends®
12. Circana/NPD Eating Patterns in America 2023
13. FMI, "The Evolving Grocery Experience" 2022

TREND 2: SIMPLIFY MY LIFE



Shopping from Afar

Shoppers use **curbside pickup** and other technology to simplify their lives. Grocery apps like **Instacart and Doordash**, along with retailer-specific apps, let consumers shop whenever and wherever. Shoppers can easily find what they need to get food on the table — without leaving their home.



Foodservice, Simplified

Digital ordering for food has become an expectation for patrons, especially for QSRs. Gen Z consumers are especially **likely to place off-premise orders** for delivery, drive-thru and pick-up. When dining out, a QR code to pay can hasten the end-of-the-meal step.

83%
Of QSR consumers said they planned to **use mobile order-ahead at QSRs**⁵



161%
Increase in digital orders for foodservice, increased by 5 billion orders since 2019⁴



>50%
Of consumers **use a QR code to pay for the bill** when they see one¹⁴



79%
Of restaurants **expect to offer mobile ordering** by 2024⁵



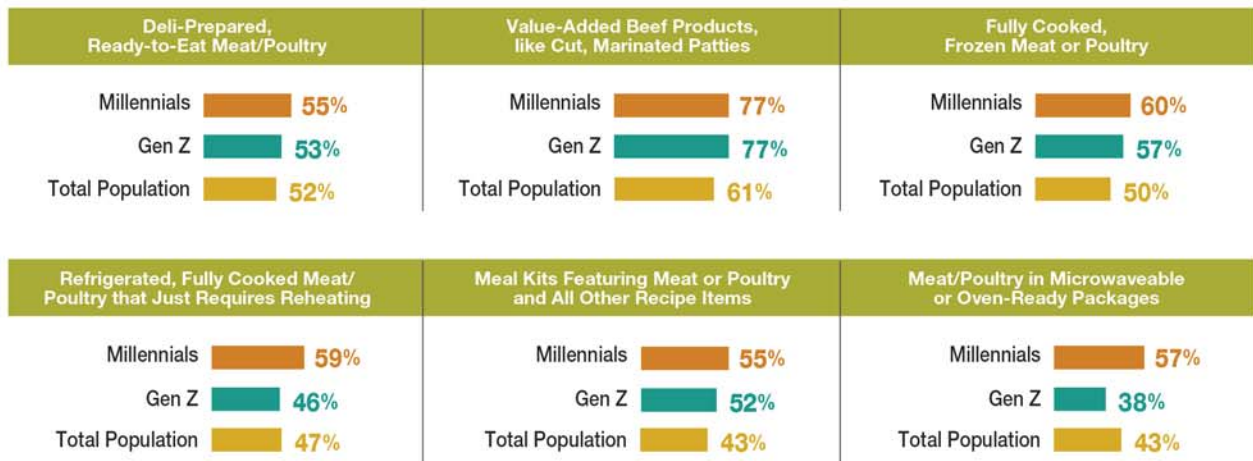
TREND 2: SIMPLIFY MY LIFE



Younger Consumers Prefer Convenient Protein

Convenience-focused protein products are winning with consumers, especially for younger generations.

Percent of consumers with high purchasing interest in convenient products²



The Latest on Plant-Based

Most consumers don't buy animal proteins or plant-based proteins exclusively – they purchase a combination of the two. The consumer pull for plant based is driven by the health halo of both plants and protein. **But consumers are demanding more from the plant-based meat category.** They want better taste, value, and nutrition. Innovation will be required to address these category hurdles.

42%

of global population eat both animal and plant-based products⁵



60%

claim they choose to eat plant-based meat to be healthier in general followed by sustainability reasons⁵



6%

3-year CAGR of the plant-based meat market 255MM in unit sales in 2022.²¹



TREND 2: SIMPLIFY MY LIFE



Real World Impact

For Retailers

Adding in-store differentiators that highlight convenience can drive interest — and sales. Use QR codes to drive consumers to experiences, recipe inspiration or messaging.

For Foodservice

Technology is streamlining the eating out experience, like using e-commerce to streamline order placement and payment. Consider offering menu items that have enough holding time for takeout, too.

For Brands

Incorporate low-effort add-ons to speed mealtime, like pre-seasoned or pre-cooked protein. Apply the perspective of an easier and engaging retail experience to your products so that they stand out.

For Consumers

Look across the shopping ecosystem for inspiration and smart ways to make life easier. Pre-marinated or cooked items work well for meal prep, saving a step and adding a good variety of flavor.



Our Experts' Take

Smart meal prep is just that — preparation. If you want it to be effortless on Tuesday night, you must put in the work up front. When you're buying protein, always think: dinner tonight and lunch tomorrow.

Chef Janet Bourbon,
Cargill Protein

High-quality protein that's also easy to prepare gets noticed at the counter, especially among younger consumers. As convenience continues to reign supreme, **innovation in technologies and products will be necessary to best connect with consumers** and deliver on their demands.

Tammy Gonzales,
Senior Marketing Manager,
Cargill Deli & Prepared Entrees

TREND 3

CONNECTING CULTURES & CUISINES

3

TREND 3: CONNECTING CULTURES & CUISINES



- ✓ **People have always connected food to comfort and exploration** — and today, the meaning of comfort food is evolving. As the most diverse generation yet, Gen Z shows a clear preference for multicultural cuisine.
- ✓ **Culinary experts have long pushed the boundaries of food**, and now they're exploring multiple cultures in a single dish. Foodservice players are the first to innovate, followed by fast-casual interpretations of the same dishes and ending with consumers trying it out for themselves at home. By diversifying food experiences, these trend-setters are shaping culture.
- ✓ **Global cuisine has become the new comfort food.** Weeknight dinners are drawing inspiration from all over the world: from layering spices and chilis together to choosing different marinades and combinations. For brands and retailers, attracting and connecting with multicultural shoppers has never been more important.



Latin and Hispanic Foods Leading the Way

Nearly half of all multicultural consumers in the U.S. are Hispanic¹, driving national preferences for Latin influences on culinary at home and in retail. Younger consumers especially consider Latin cuisine a mainstay in their meal rotations.

95%
Of consumers have tried Mexican cuisine¹⁵



61%
Of consumers interested in Latin cuisine for the variety of flavors its recipes inspire⁶



Variety of Proteins
Are used in Latin and Hispanic foods, like barbacoa, al pastor, carnitas, angus steak, chicken thigh & yellowfin tuna¹⁷



Trending Sauces
And ingredients include chili lime, chimichurri, morita peppers and habanero peppers¹⁷



TREND 3: CONNECTING CULTURES & CUISINES



Chaos Cooking in Action

Global cuisine is also drawing inspiration from a new trend called “chaos cooking” — **mashing two cuisines, like Korean and Mexican, together in one dish.** Another trend called “flavor tourism” has consumers traveling the globe and experiencing different cultures, without leaving their dining room table. Chaos cooking and flavor tourism are getting a boost from shareable social content, especially video recipes.

Bulgogi Steak Enchiladas with Gochujang Mole

Your favorite steak enchilada just took a trip to Korea, with a sweet soy steak marinade, gochujang-infused mole sauce, a toasted sesame sour cream and, of course, lots of cheese.



For the Steak

1 pound ribeye or strip steak
1 cup bulgogi sauce

1. Marinate the steak in the bulgogi sauce for 1 hour.
2. Grill or sauté to preferred degree of doneness.
3. Let steak rest for 5-10 minutes and then slice thinly. Reserve.

For the Sesame Sour Cream

1 cup sour cream
2 TBSP toasted sesame seeds
1 TBSP sesame oil
As needed, Diamond Crystal Kosher Salt

1. Combine sour cream, toasted sesame seeds, and sesame oil and stir well.
2. Adjust seasoning. Reserve.

For the Gochujang Mole

3 cups mole sauce
¼ cup gochujang

1. Combine mole and gochujang and mix well with a wire whip. Reserve.

To Assemble

Gochujang mole sauce
8 individual 6-inch flour tortillas
Sliced steak
1 cup shredded mozzarella cheese

1 cup shredded cheddar cheese
1 cup sesame sour cream
1/2 cup diced tomatoes
1/3 cup sliced scallions
2 TBSP chopped cilantro



8
SERVINGS

- 1 Spray one half pan with food release spray.
- 2 Ladle 1 cup of gochujang mole sauce to cover the bottom of the pan.
- 3 Spoon 1 TBSP of mole sauce onto a tortilla. Add about 2 ounces of sliced steak and 2 TBSP of shredded mozzarella.
- 4 Roll the tortilla into a tight cylinder and place in baking dish. Repeat with remaining tortillas, steak and mozzarella.
- 5 Cover the rolled tortillas with the remaining mole sauce. Sprinkle with shredded cheddar cheese.
- 6 Cover with aluminum foil and bake for 15-20 minutes, or until an internal temperature of 145°F is reached and the cheese has melted.
- 7 Garnish with the sesame sour cream, diced tomatoes, sliced scallions and cilantro.

TREND 3: CONNECTING CULTURES & CUISINES



Korean Chicken Elote with Kimchee Aioli & Crispy Onions

A Latino/Asian mash up. Think Mexican street corn with Seoul and chicken.

For the Chicken

- 1 16-ounce package Charter Reserve Korean Chicken
- 1 TBSP chipotle in adobo
- 1. Empty Korean Chicken into saucepan.
- 2. Tear chicken into shreds.
- 3. Stir in chipotle in adobo. Heat to an internal temperature of 160°F

For the Elote

- ¼ cup kimchee, strained
- ¼ cup mayonnaise
- 2 cups charred corn kernels
- 1 TBSP freshly squeezed lime juice
- To taste, Diamond Crystal Kosher Salt
- 1. Combine drained kimchee and mayonnaise in blender and puree.
- 2. Add lime juice and salt.
- 3. Combine charred corn and kimchee mayonnaise. Stir until well mixed. Adjust seasoning.

To Assemble

- Elote
- Korean chicken
- ½ cup crumbled cotija cheese

- ½ cup crispy fried onions
- ½ cup julienned radishes
- As needed, cilantro sprigs
- 32 wonton skins, cut in half and fried until crispy

- 1 Spoon approximately ¼ cup of elote into serving bowl.
- 2 Add 2 ounces of shredded Korean chicken.
- 3 Garnish with 1 TBSP each of crumbled cotija, fried onions and julienned radishes. Finish with a sprig of cilantro.
- 4 Serve with wonton chips on the side.

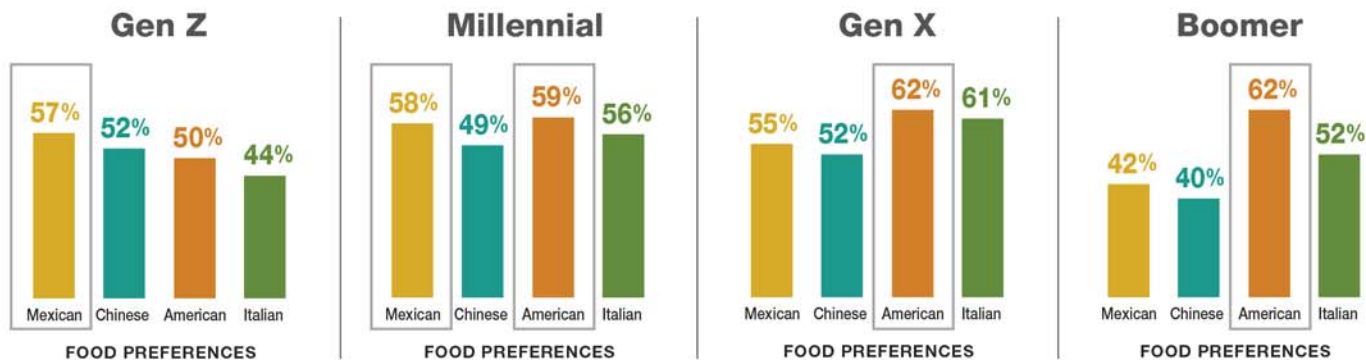


8
APP
PORTIONS



Gen Z Loves Global Foods

The future of protein is global. As younger generations increase their share of wallet, retailers will seek more placement opportunities for globally inspired proteins. For Gen Z, Mexican and Chinese food displaced American food as the most beloved cuisine.⁵



TREND 3: CONNECTING CULTURES & CUISINES



Real World Impact

For Retailers

Fusion foods are continuing to trend upward, giving retailers an opportunity to be ahead of the curve when it comes to innovation. Diversify offerings both at the case and in hot-and-ready meals by leaning into regionality and local flavors.

For Foodservice

Keep experimenting and testing new menu offerings based on consumer feedback and trending food-centric insights. Younger consumers especially enjoy authentic flavors, contrasting textures and spice blends.

For Brands

Utilize smart packaging to genuinely connect with multicultural consumers — messaging, languages and recipe inspiration are simple yet powerful ways to underscore authenticity.

For Consumers

Variety is the spice of life. By taking cues from your favorite restaurant menus and adding unexpected ingredients, you can experience diverse flavors at home.



Our Experts' Take

An easy way to change up the flavor profile of a recipe is by adding different sauces, like chili lime or chimichurri, to the protein or overall dish.

Chef Barry Miles,
Cargill Protein

Foodservice is at the forefront of fusion innovation, setting expectations for retailers and impacting the recipes that consumers cook at home.

Jay Furnald,
Consumer Insights Manager, Cargill

TREND 4

REDEFINING VALUE

4

TREND 4: REDEFINING VALUE



- ✔ **Value means different things to different people.** For some, it's choosing a fast-casual restaurant instead of a sit-down one. For others, it's stretching the grocery budget by buying ground beef or chicken rather than steak.
- ✔ **Food behaviors are shifting at both ends of the cost continuum** because defining value is so personal, resulting in a barbell effect. High-income consumers (\$125K and above) are choosing more premium items in grocery stores to replace a restaurant experience. And lower-income consumers (\$45K and below) are buying fewer items, looking for deals and shifting to non-perishables to avoid food waste.
- ✔ **Brands are increasing private label and premium offerings** in response to comparatively slow spending in the middle of the pricing spectrum, while foodservice adjusts their menu strategies.



Replacing Restaurant Experiences

People want to elevate their meals and create memorable experiences. Instead of eating out, some consumers are choosing deli-prepared meals or recreating restaurant meals at home.

86%

Of all eating occasions are at home¹⁷



60%

Say they are eating out less often⁷



87%

Of people try to recreate restaurant meals at home²



53%

Say deli prepared foods are a good value¹⁸



TREND 4: REDEFINING VALUE



Trading Down in Foodservice

When dining out, budget-conscious consumers skip extras like appetizers, drinks and dessert, preferring to stick with just the main entrée.¹⁹ In the QSR context, consumers are choosing simple or smaller. At the drive-thru, consumers are more likely to choose a regular option (for example, a basic chicken sandwich) instead of the pricier "deluxe" version with all the add-ons. And when choosing a drink or fry size, they save money by ordering a smaller size than before.¹⁹

71%

Of consumers would like the option of a **smaller portion size at a smaller price**¹⁴



7 in 10

Would take advantage of operator discounts for **off-peak days & time-of-day purchases**¹⁴



Savings at the Store

Consumers are also seeking ways to stretch their grocery dollars, which often means seeking more affordable options like private labels. Value retailers, like mass merchandisers and club stores, are also seeing an increase in interest, especially when purchasing consumer-packaged goods.

71%

Of North American consumers are **looking to reduce spend on food and beverages**, up from 54% in 2020²⁰



33%

Of grocery shoppers say **their primary channel is "mass merchandiser,"** up from 24% in 2014⁷



60%

Increase in private label preference since 2021 and continues to grow²



"Trading Down"

Proteins due to cost, like switching from beef muscle to ground beef or reducing meat purchase overall²



TREND 4: REDEFINING VALUE



Real World Impact

For Retailers

Everyone is trying to stretch their dollar in grocery stores. The more retailers can overtly communicate savings and value, the stronger the proposition is for shoppers (think advertisements and deals).

For Foodservice

Depending on their lifestyle, value means something different to each consumer. Ensure your menu includes items that appeal to people across the cost continuum.

For Brands

Explore pricing strategies on both ends of the spectrum: cost-effective proteins for families on tighter budgets and extra-special products for people recreating a restaurant experience. Highlight details that signal to shoppers that your product is a “treat” or a “splurge” that elevates an ordinary meal.

For Consumers

Saving on protein can be as simple as looking for sale items or buying in bulk. You can also search online for coupons and store promotions to find deals before you shop.



Our Experts' Take

Consumers are open to trying private label and don't think of it as second-rate anymore. This is a big opportunity to explore private label strategies to help retailers gain loyalty.

Allison Welch-Lis,
Director, Cargill Protein

I batch prepare protein to save time and money. I cook enough beef, chicken or turkey that will last a couple of weeks. Then I cut or shred the meat, and store in the freezer to use later.

Chef Barry Miles,
Cargill Protein

For more information, please visit
www.cargill.com



ProteinPROMISE