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Gen Z as adults in 2035

They may not be the consumers you think
they are going to be

Experts in what consumers want and why



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Can you guess the generation?

Can you guess the generation?

Which generation am I?

Seen as globally aware, hardworking, powerful, and unique. However, they are not perceived as future-focused or as wanting to make the world better for everyone.

Can you guess the generation?

Which generation am I?

This group is seen as privileged, self-centered, and influenced by others. However, they are also perceived positively as accepting/open-minded, creative/innovative, and future-focused.

Can you guess the generation?

Which generation am I?

They are viewed as unique, hardworking, globally aware, future-focused, and powerful. They are perceived more positively compared to most other generations.

Can you guess the generation?

Which generation am I?

They are seen most negatively compared to other generations. They are perceived as privileged, self-centered, and influenced by others.

Can you guess the generation?

Baby Boomers

Seen as globally aware, hardworking, powerful, and unique. However, they are not perceived as future-focused or as wanting to make the world better for everyone.

Gen X

They are viewed as unique, hardworking, globally aware, future-focused, and powerful. They are perceived more positively compared to most other generations.

Millennials

This group is seen as privileged, self-centered, and influenced by others. However, they are also perceived positively as accepting/open-minded, creative/innovative, and future-focused.

Gen Z

They are seen most negatively compared to other generations. They are perceived as privileged, self-centered, and influenced by others.

Where Gen Z may be in 10 years

Settled into careers

Might have purchased
a home

Might be married or
with a partner

Might have children

Lots of bills to pay

Ageing parents that
need their help, plus
kids in school

Insight: These values make them like everyone else in their 30s, but there are some key differences.

Some observations on what has and will continue to shape Gen Z

Life is about
disasters

True digital
natives: AI is a tool
and a search
engine

Mental health and
physical health no
longer separate
entities

Cultural identity
and diversity is the
norm and not an
exception

Customization and
personalization an
expectation

Financial health is
paramount

Higher education?
Maybe not

Insight: These factors make them different from other generations. Let's look deeper at who they are and what drives them today (and what they think about chicken)

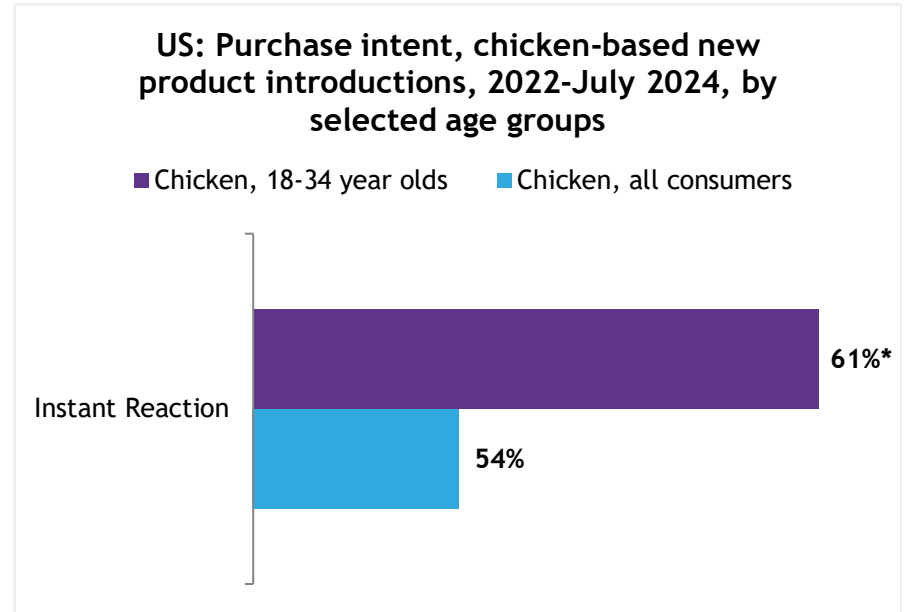
Younger consumers more likely to say they will buy chicken

Younger consumers are significantly more likely to say they would buy chicken product introductions. They are:

- Less brand loyal--they are more likely to switch brands
- More influenced by good value than older consumers
- Younger consumers in mid income ranges much more likely to say they would buy chicken
- More likely to say they routinely shop online

What this means for chicken:

- Delivering value (low price and otherwise) is essential for this younger demographic



* The difference of the primary to the benchmark group is statistically significant, at a 95% confidence level

Examples of what younger consumers say they will buy



Extra-large, quick prep
Perdue Chicken Breast Mega Nuggets "This product allows me to enjoy chicken nuggets with little to no prep time." - Male, South, 18-34



Good value, looks fresh
Super Saver Foods Chicken Drumsticks "It looks fresh and you can clearly see all of the product. Plus the price is very good." - Female, West, 18-34



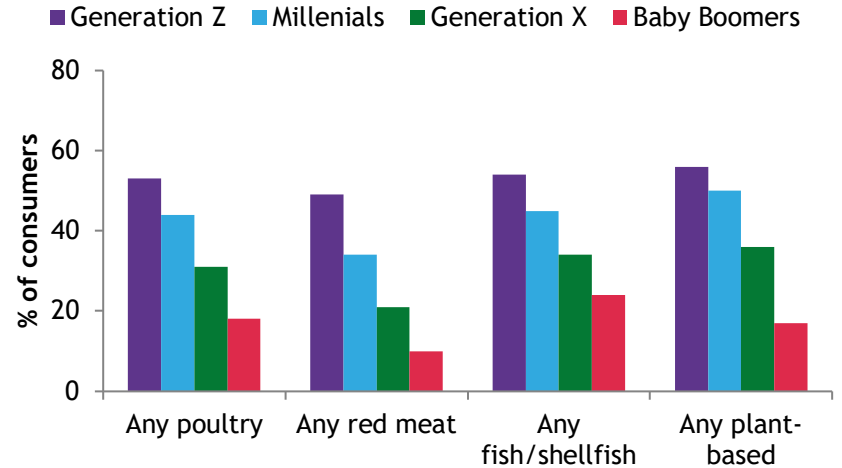
Good value and "no bad stuff"
Rotisserie Seasoned Chicken Breast Bites "The price in tandem with how much product I'd be getting seems like a great deal. I also like the short ingredient list that doesn't include any artificial ingredients." - Female, South, 18-34

Gen Z turns to BOTH animals and plants for their protein fix

Gen Z seek a balanced diet that includes protein from both animal and plant sources. With a high openness to diversity, over 40% of Gen Zs identify as omnivores and 14% identify as flexitarians. They have less established routines and cooking experience, leading to a more nuanced view of the role of protein (and protein sources) in their diet.

What it means for chicken: Now is the time to shape the routines and habits of younger consumers, via prepared products, recipes, and convenient solutions.

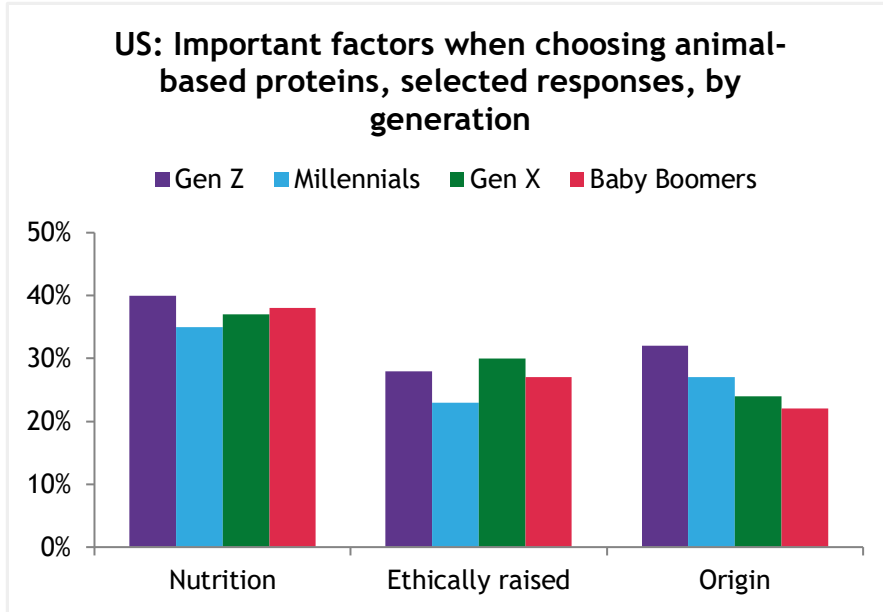
US: anticipated increase in types of protein consumption, by generation, 2024



Base: internet users aged 18+ who eat select proteins

Source: Kantar Profiles/Mintel, ([Poultry](#), [Red meat](#), [Fish/shellfish](#), [Plant-based](#)) February 2024

Nutrition and sourcing more important to Gen Z



This generation is unsure if they consume enough protein, so nutrition is important to them. They also want to know where their proteins come from and how they are raised.

For this younger consumer group, naturalness and organic are important measures of the healthfulness of proteins.

What it means for chicken: Tell your stories regarding how chickens are raised and processed.

Fieldwork: February 2024

Base: 1,852 internet users aged 18+ who have consumed animal-based protein in the past six months

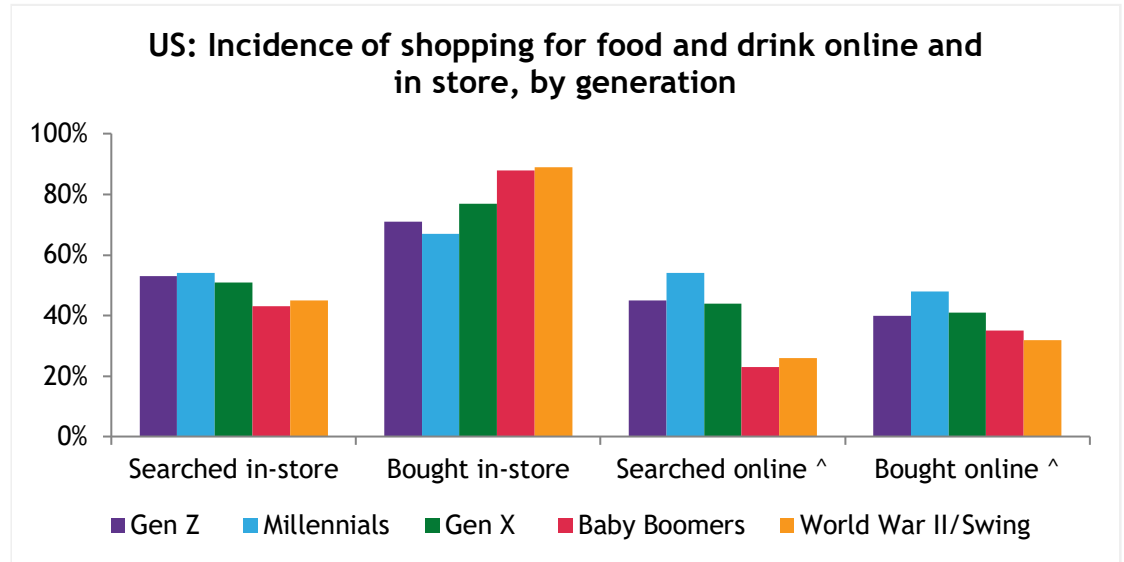
Source: Kantar Profiles/Mintel

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Gen Z uses online sources, but more likely to buy groceries in store

As most younger consumers, Gen Z uses the internet for research, but is more likely than Millennials to shop in person, perhaps to ensure finding the best deals.

What it means for chicken:
Leverage your in-store presence (sampling?) without ignoring offering online options.



Fieldwork: December 2023

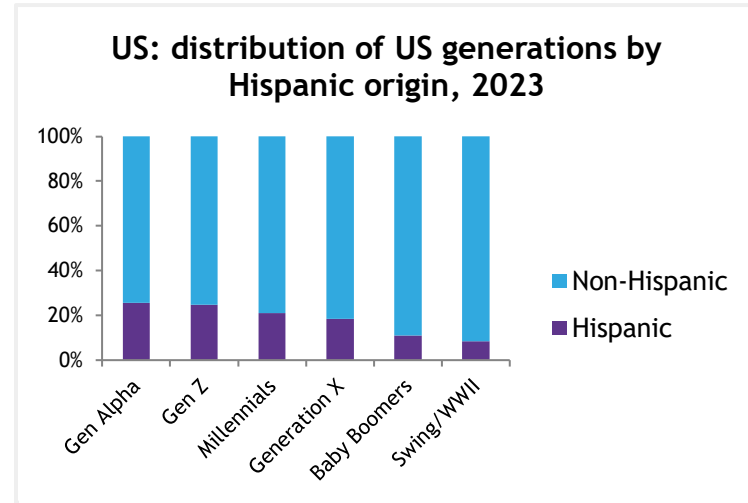
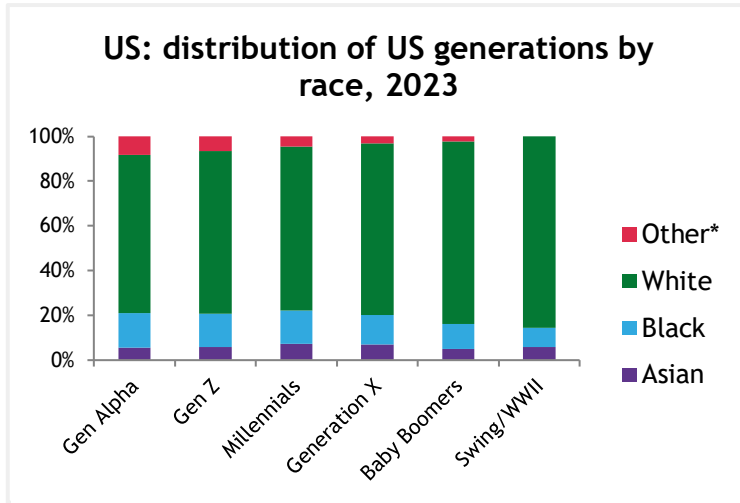
Base: 1,590 internet users aged 18+ who have shopped for food/beverages (in-store or online) in the past 12 months

Source: Kantar Profiles/Mintel

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Gen Z is increasingly culturally diverse

Cultural outreach rises in significance for younger generations both now and in the future.



*Includes American Indian/Alaska native, native Hawaiian/other Pacific Islander, and two or more races

Note: Data may not equal totals due to rounding

Source: US Census Bureau, 2017 National Population Projections/Mintel

What this means for chicken in 2035

More opportunity dark meat chicken: Younger consumers are more likely to say they would buy dark meat chicken than other consumers do.

More opportunity for global flavors: Younger consumers like to experiment.



Red Moon Hawaiian Style Huli Huli Chicken Thigh

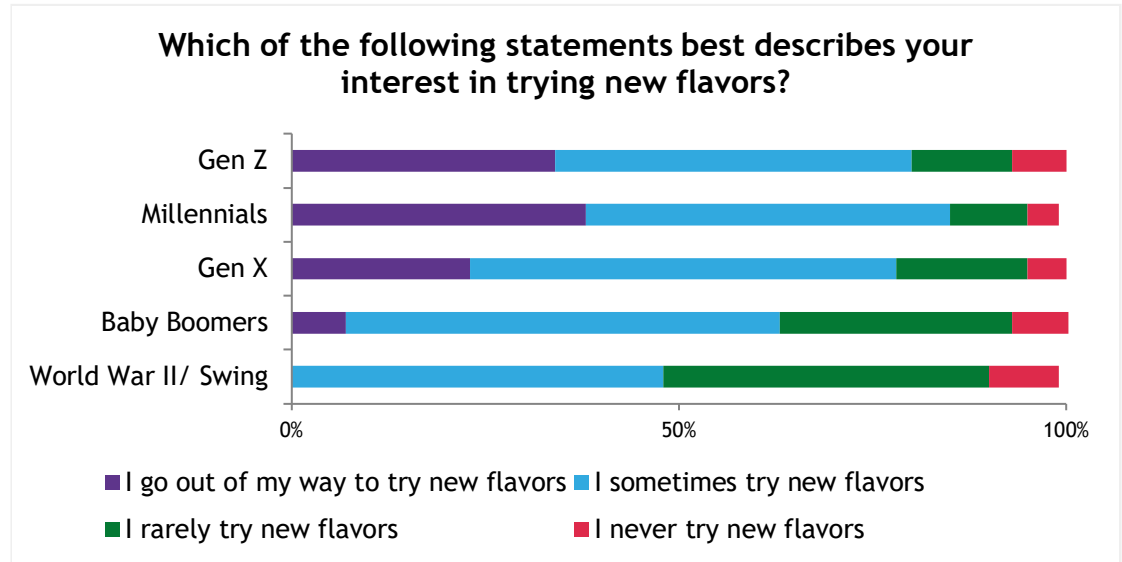


Amazon's Aplenty Butter Chicken with Basmati Saffron Rice

Gen Z are adventurous eaters, right behind Millennials

Not surprisingly, it is younger consumers who are more experimental, and older consumers who are less experimental.

What it means for chicken:
Room for value-added global flavors in prepared products; tie-ins with authentic global seasoning brands.



Fieldwork: November 2023

Base: 2,000 internet users aged 18+

Source: Kantar Profiles/Mintel

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What this means for chicken in 2035



Sam's Club Korean Style BBQ Chicken Breast with Bulgogi Inspired Sauce

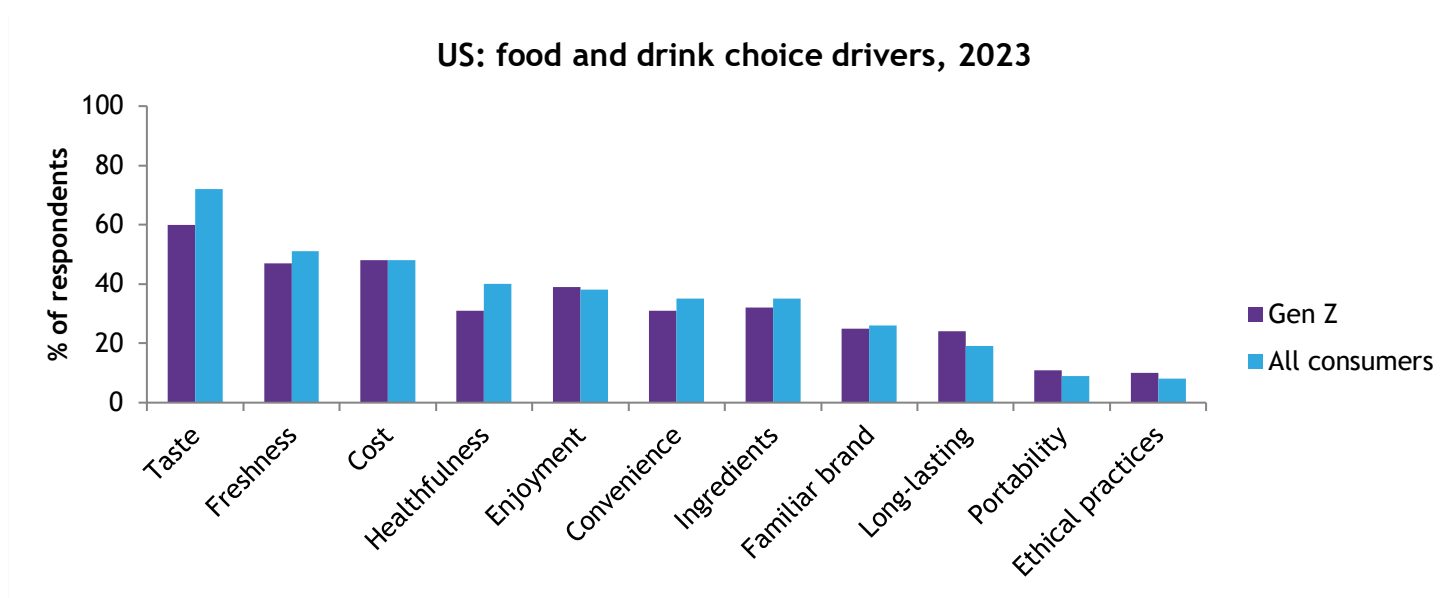


Summ! Chicken Lumpia Filipino-Style Spring Rolls

Gen Z is a bit more cautious when it comes to experimentation than Millennials. Find ways to combine the unique with the familiar.

Taste is most important, but other factors influence purchase

Taste is a purchase driver more for consumers as they age, as is health. "Enjoyment" is a broader term.



Base: 1,847 internet users aged 18+ who are responsible for food and drink shopping in household

Source: [Kantar Profiles/Mintel](#), December 2023

What this means for chicken in 2035



John Soules Minions Chicken Nuggets

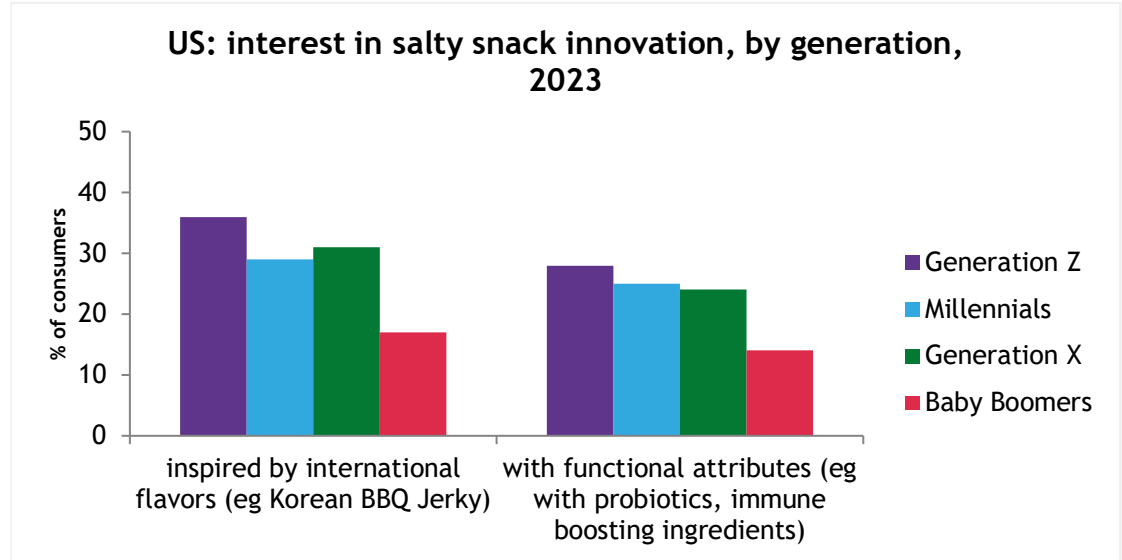


Kardea Brown Country Kitchen Chicken Pot Pie

"Enjoyment" is like "hygge"-- taste and flavor but also the overall experience, which can be achieved via comforting dishes, flavors or forms evocative of happy times, or something that just makes you smile.

Fun and functional top younger consumers' interest in innovation

For those consumers who like to try new things, success may be found in combining unique flavor (fun and enjoyment) with functional benefits.



Base: 2,000 internet users aged 18+

Source: [Kantar Profiles/Mintel](#), December 2023

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What this means for chicken in 2035



Roasted Ranchero Morning Protein Bowl



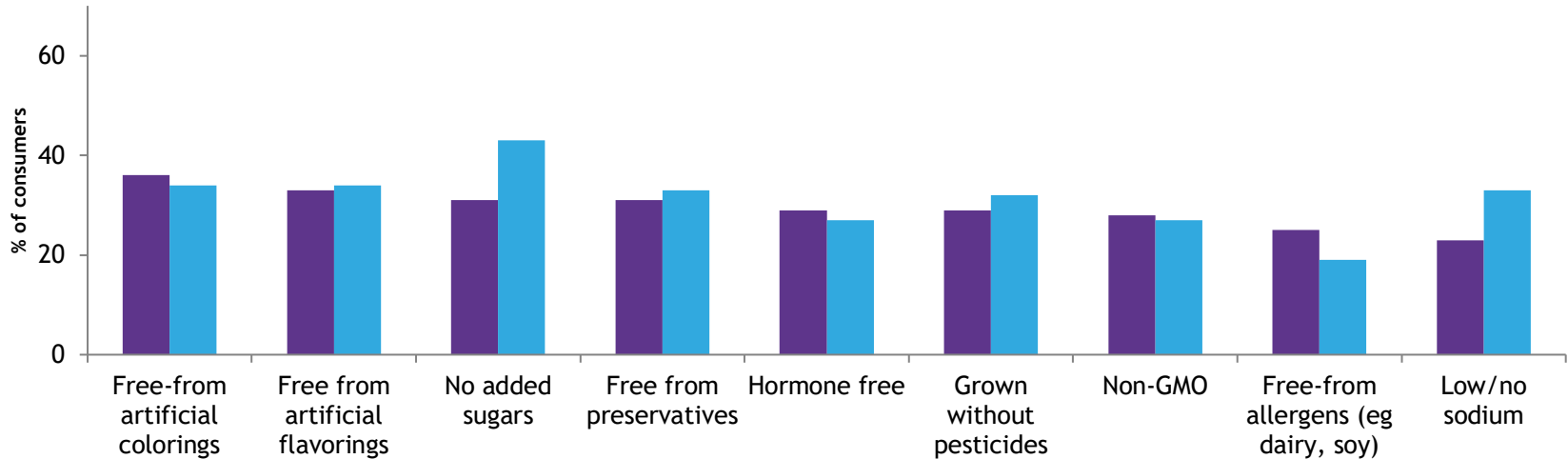
Chicken Breast Burrito Bowl

Talk about the functional benefits (even if it is only about protein) while also offering unique flavor choices.

"Healthy" to Gen Z is more about "no bad stuff"

Although they are concerned about added sugars, "free from" claims are more important.

US: impactful claims in food/drink purchase, 2023

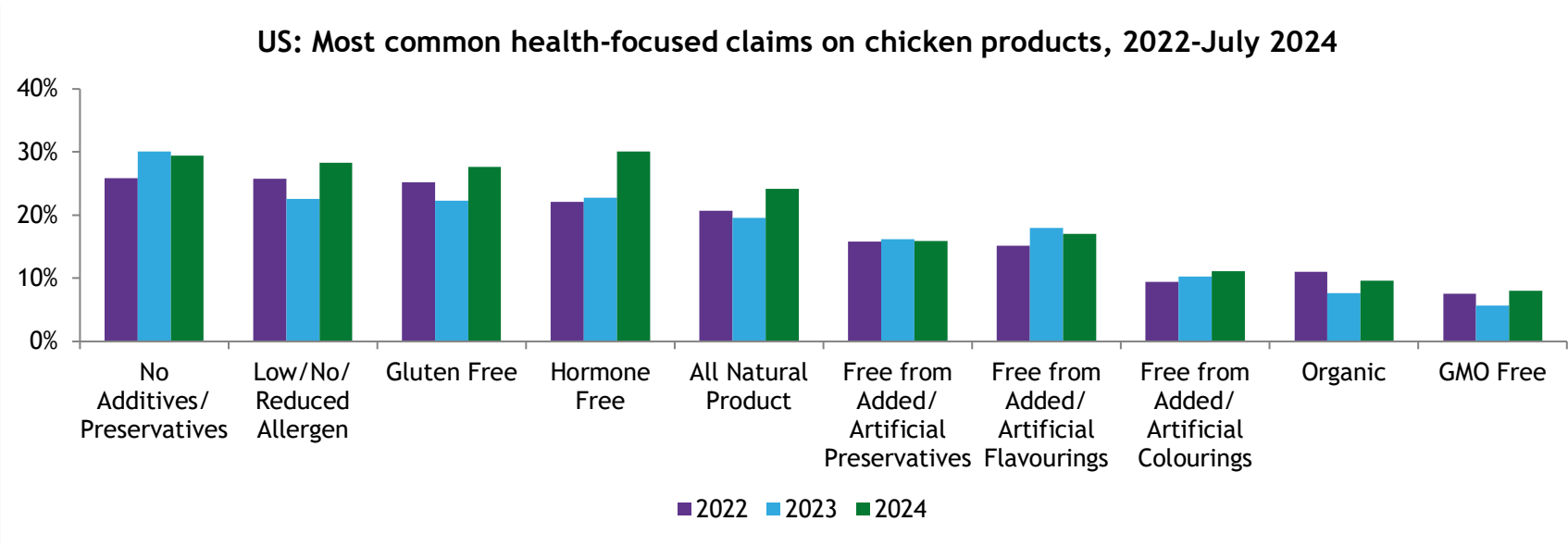


Base: 2000 internet users aged 18+

Source: [Kantar Profiles/Mintel](#), June 2023

Claims on chicken products echo what younger consumers seek

So far in 2024 most claims have increased, especially hormone free.



Includes unseasoned and raw chicken, plus further processed products, meals, snacks, soup containing chicken

Source: Mintel GNPD



What it means for chicken in 2035



Aldi Sports Shaped Chicken Nuggets



Organic Free Range Whole Body Chicken

"Clean label" or UPFs are not going anywhere as Gen Z seeks more quality over quantity.

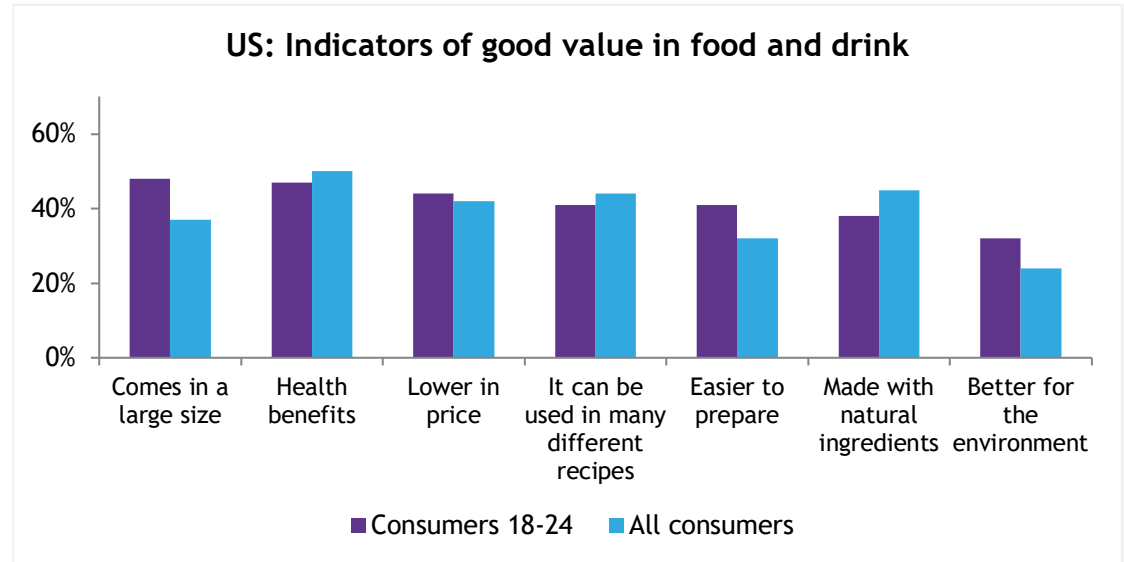
Aldi nuggets say clearly on pack the chicken is "raised with no antibiotics ever, no artificial flavors, colors or preservatives."

Mary's Organic Chicken references "complete traceability."

"Value" is far more than low price

Many factors contribute to perceptions of value.

In addition, half of consumers say they would pay more for products from a trusted brand or that are high quality.



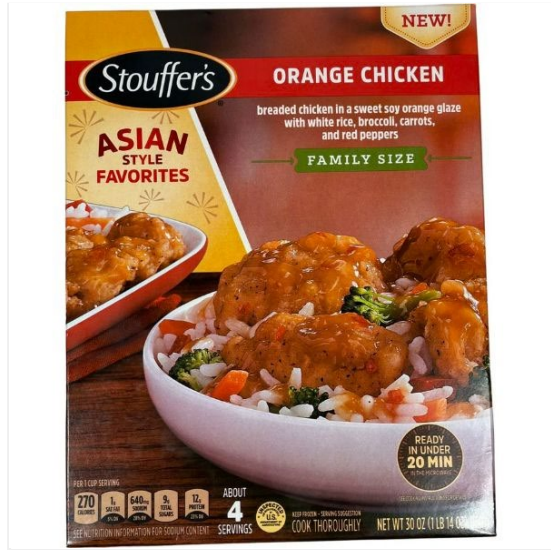
Fieldwork: US - September 2023

Base: 1,000 internet users aged 18+

Source: US - Kantar Profiles/Mintel

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What this means for chicken in 2025



Stouffer's Asian Style Favorites Orange Chicken



Kettle & Fire Regenerative Chicken Bone Broth

Deliver value in all the ways you can for this demographic-- larger sizes, lower unit prices. Keep in mind "value with values," leaning into those added values that Gen Z prizes but may not be able to afford today (and this includes higher prices due to sustainability positioning).

Gen Z continues to need help with meal prep

COOKING FATIGUE

21%

of Gen Z consumers say they are tired of cooking at home, compared to 18% for all consumers



Chef Ramsey Chicken Pot Pie

Their cooking skills are less advanced, and are more tired of cooking at home (already).

What this means for chicken: Prepared meals, seasoned products, tie ins to chefs or restaurants to help convey product quality and results.

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Fairness and equity important to Gen Z

WILLING TO SUPPORT
EQUITY

23%

of Gen Z consumers say they would pay more for products/services from brands owned by under-represented groups



Cauli' flour Cheesy Chicken & Rice

This generation is most likely to have a focus on diversity and equity issues.

What this means for chicken:
Communicate your programs and affiliations clearly and honestly.

A few final thoughts about Gen Z, chicken, and 2035

Core values will stay with Gen Z

Value, responsibility, and flexibility will remain core to what drives Gen Z food choices. **Insight:** Continue to address those needs now to build credibility with this group.

Chicken will continue to have a place on the plate

While Gen Z is concerned about the environment, they are more likely to be animal protein eaters. **Insight:** Promote the versatility of chicken.

Diverse makeup of Gen Z is good news for chicken

This younger generation is more ethnically diverse, which opens the door to more flavor and form experimentation. **Insight:** Is this generation the dark meat chicken generation?

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Thank you



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