Poultry Market Outlook – October 2026

Industry Outlook Meeting

Gary Lohr
Livestock Marketing Information Center

Denver, Colorado
October 21,2026

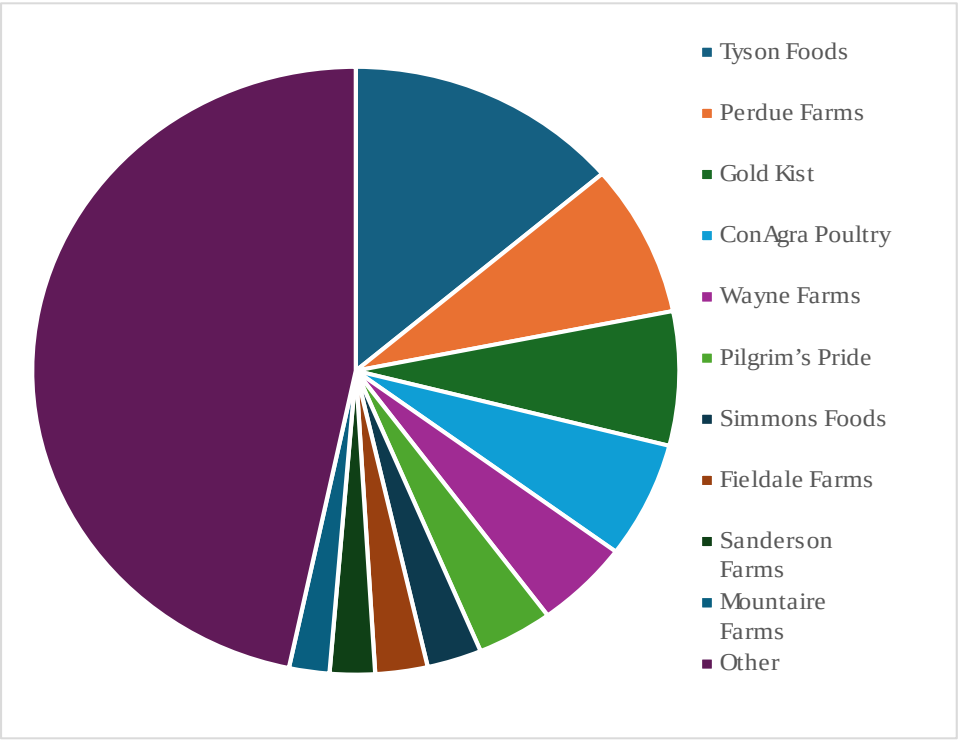
Data Source: USDA-AMS & USDA-ERS, Compiled & Analysis by LMIC

Evolutions

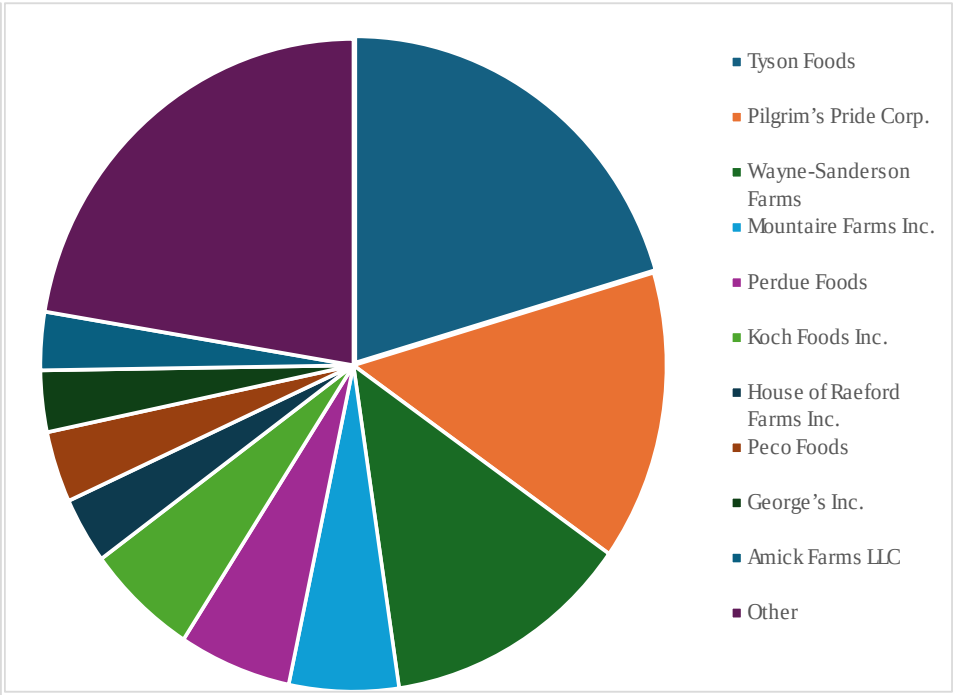
- Efficient Data Flows Through Marketing Channels – The Data Handshake
- Packaging Technology

Chicken Processors – 1992 and 2025

1992 Processor Production



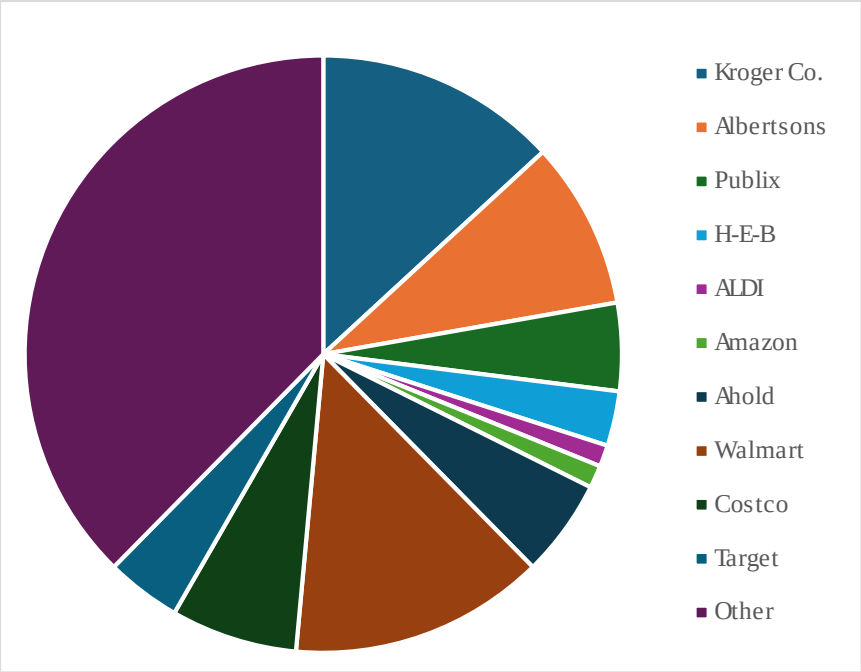
2025 Processor Production



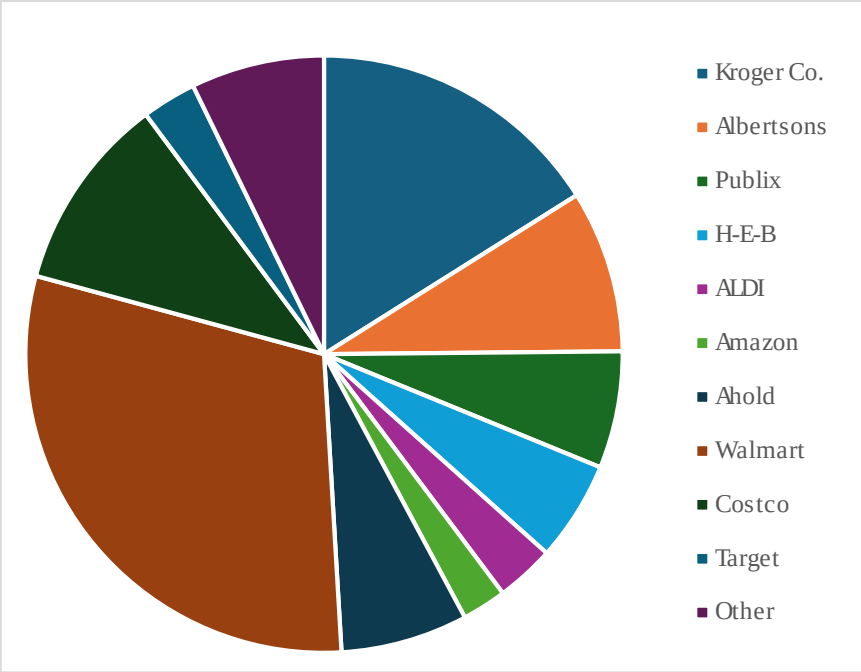
Sources: WattAG publications, USDA-NASS, USDA-ERS

Grocery Stores – 2005 and 2025

Grocery Store Retail Sales Shares – 2005



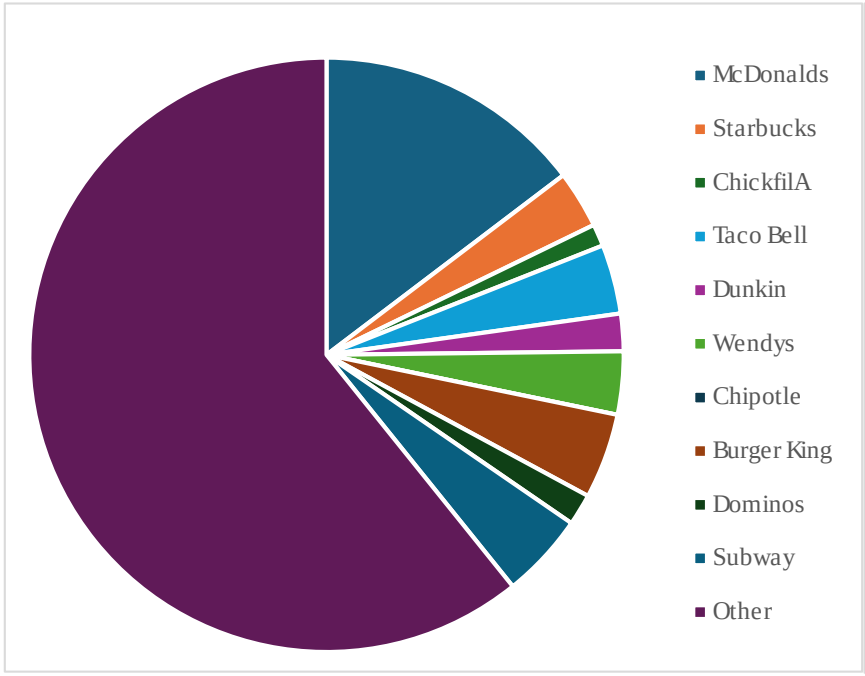
Grocery Store Retail Sales Shares – 2025



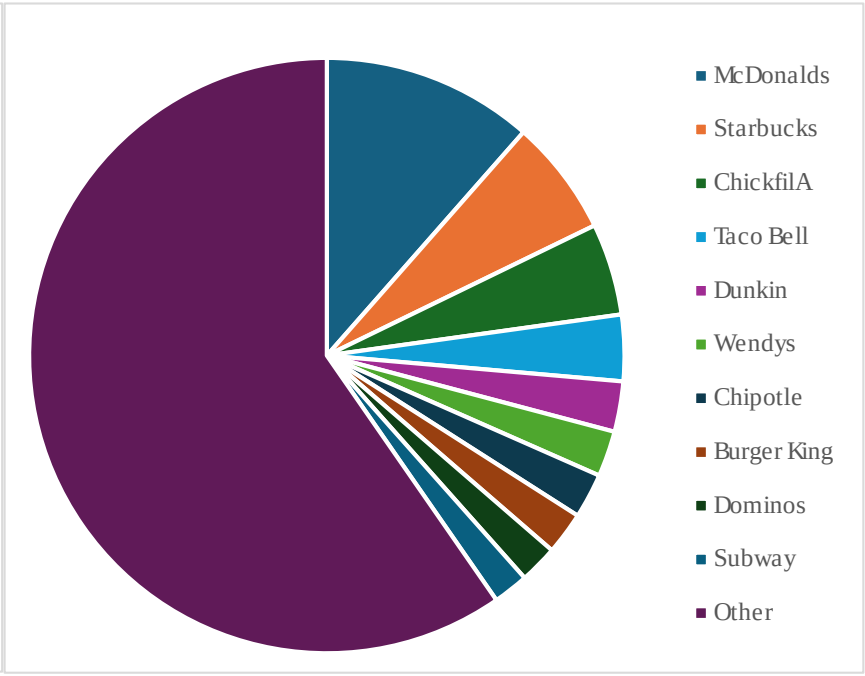
Sources: Progressive Grocer Magazine, US Census Bureau Economic Indicators

Restaurants – 2005 and 2025

Limited Service Restaurant Retail Sales Shares 2005



Limited Service Restaurant Retail Sales Shares 2025



Data Sources: QSR Magazine, US Census Bureau Economic Indicators

Packaging

Grocery Store 1993

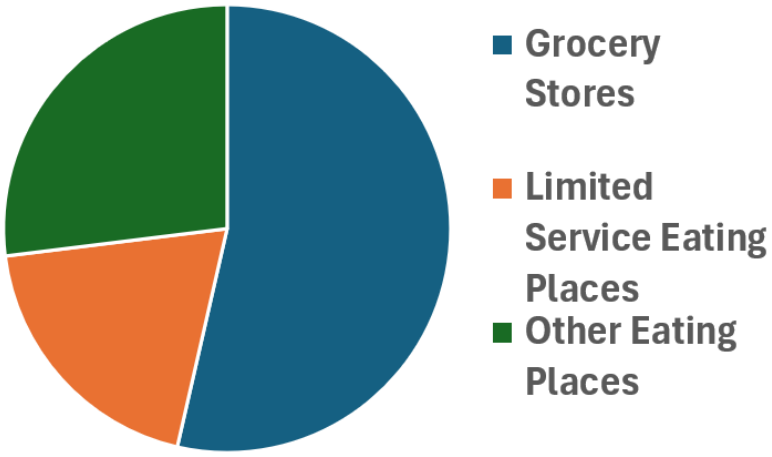
- PVC stretch-film overwrap on polystyrene (EPS) foam trays
- **Shelf life:** Short (2–4 days typical for overwrap beef). Frequent rewrapping and markdowns.
- **Branding:** Basic labels; store-cut meat with minimal branding.

Grocery Store 2025

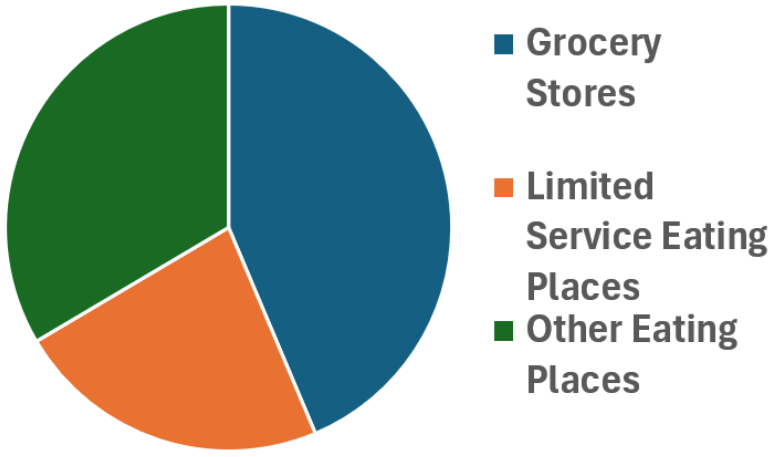
- **Case-ready packaging**: MAP trays, vacuum-skin packs, roll-stock vacuum packs, high-barrier films. Centralized cutting/packing at processors.
- **Shelf life:** Much longer (7–21+ days depending on MAP or vacuum). Lower shrink, fewer markdowns.
- **Branding:** Highly branded case-ready programs, QR codes, traceability, nutrition panels, sustainability claims.

The Consumer – 1992 and 2025

Retail Sales – 1992

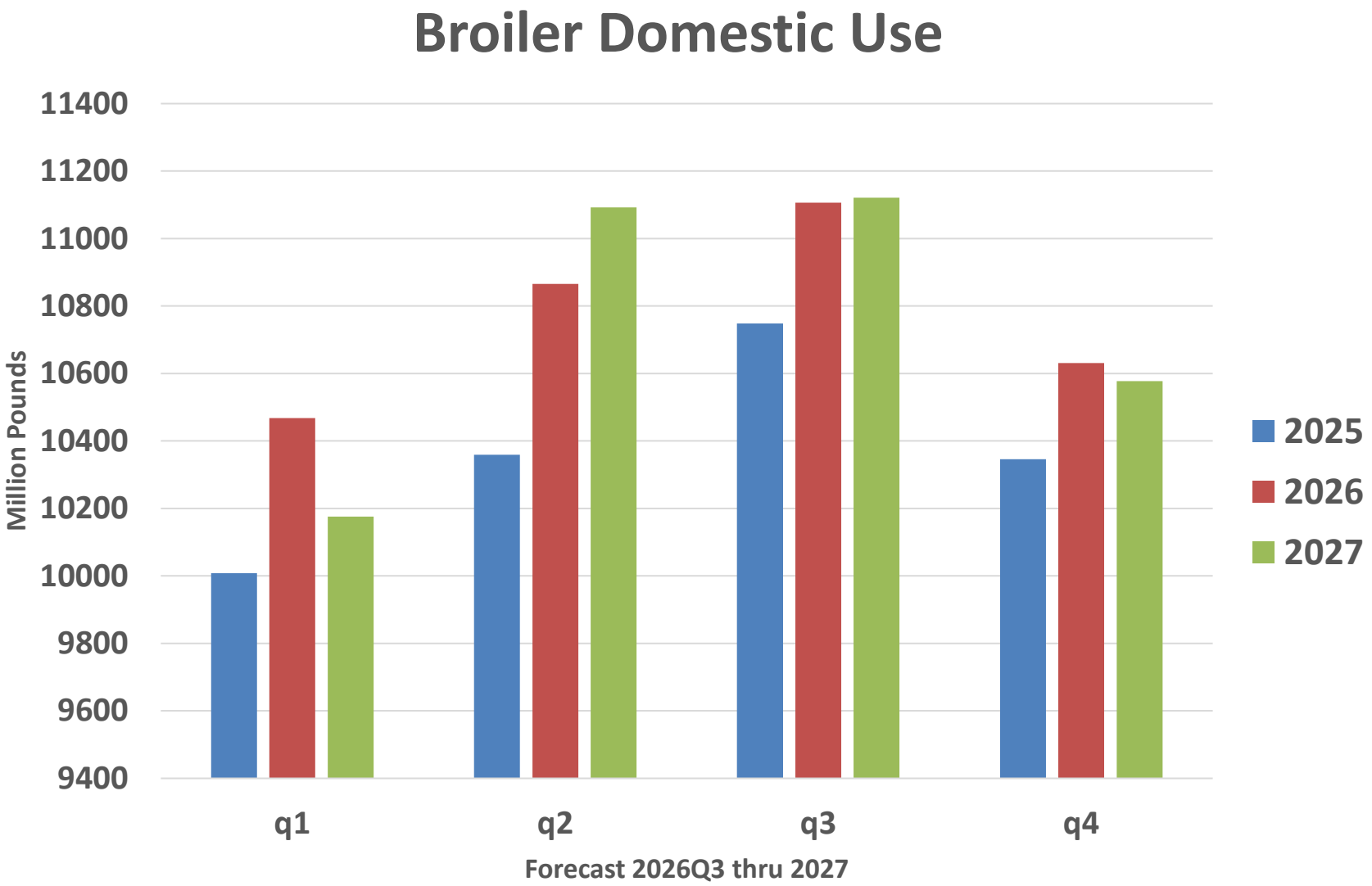


Retail Sales – 2025



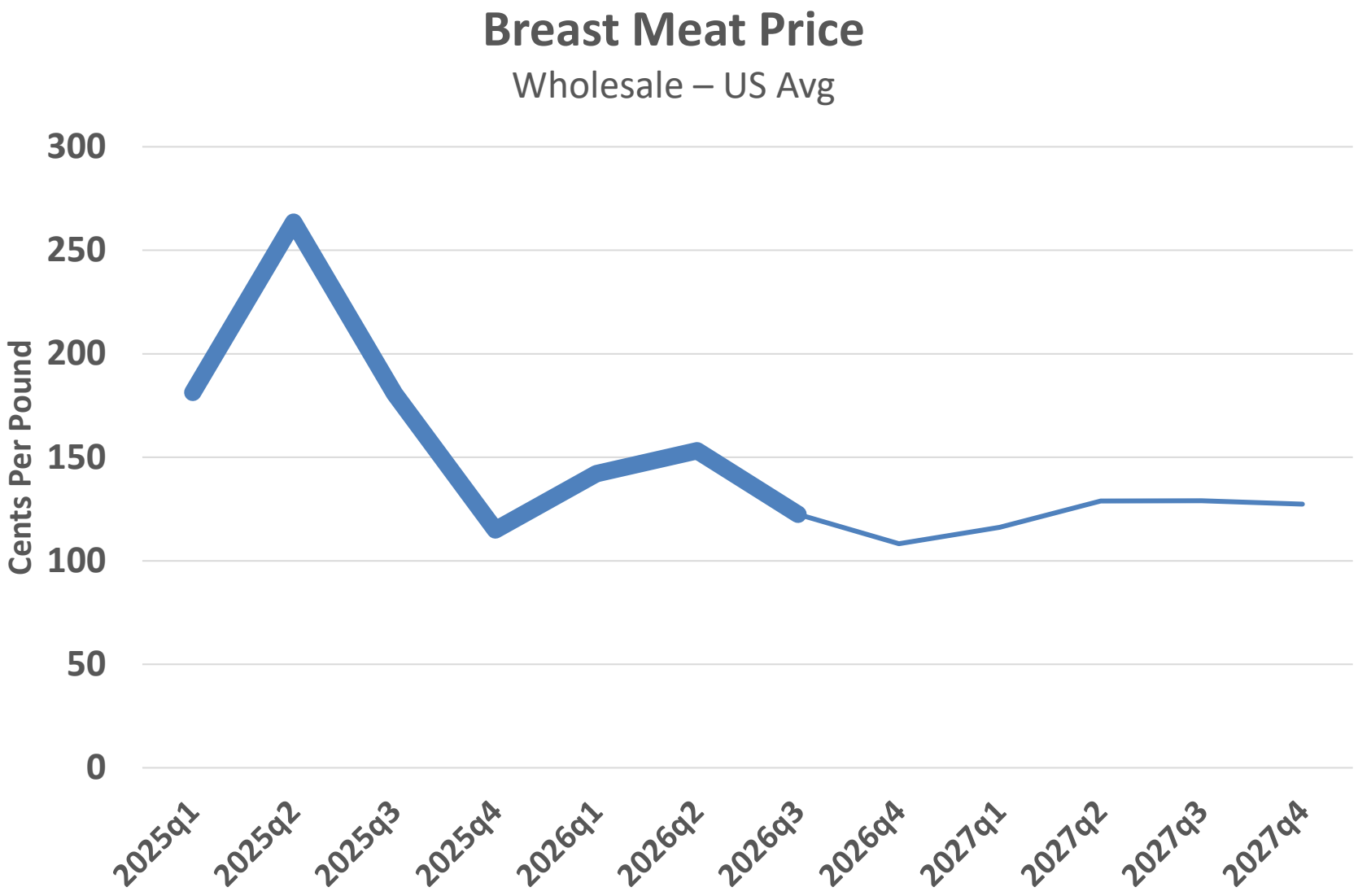
Data Source: US Census Bureau Economic Indicators

Chicken Consumption – 2025 to 2027



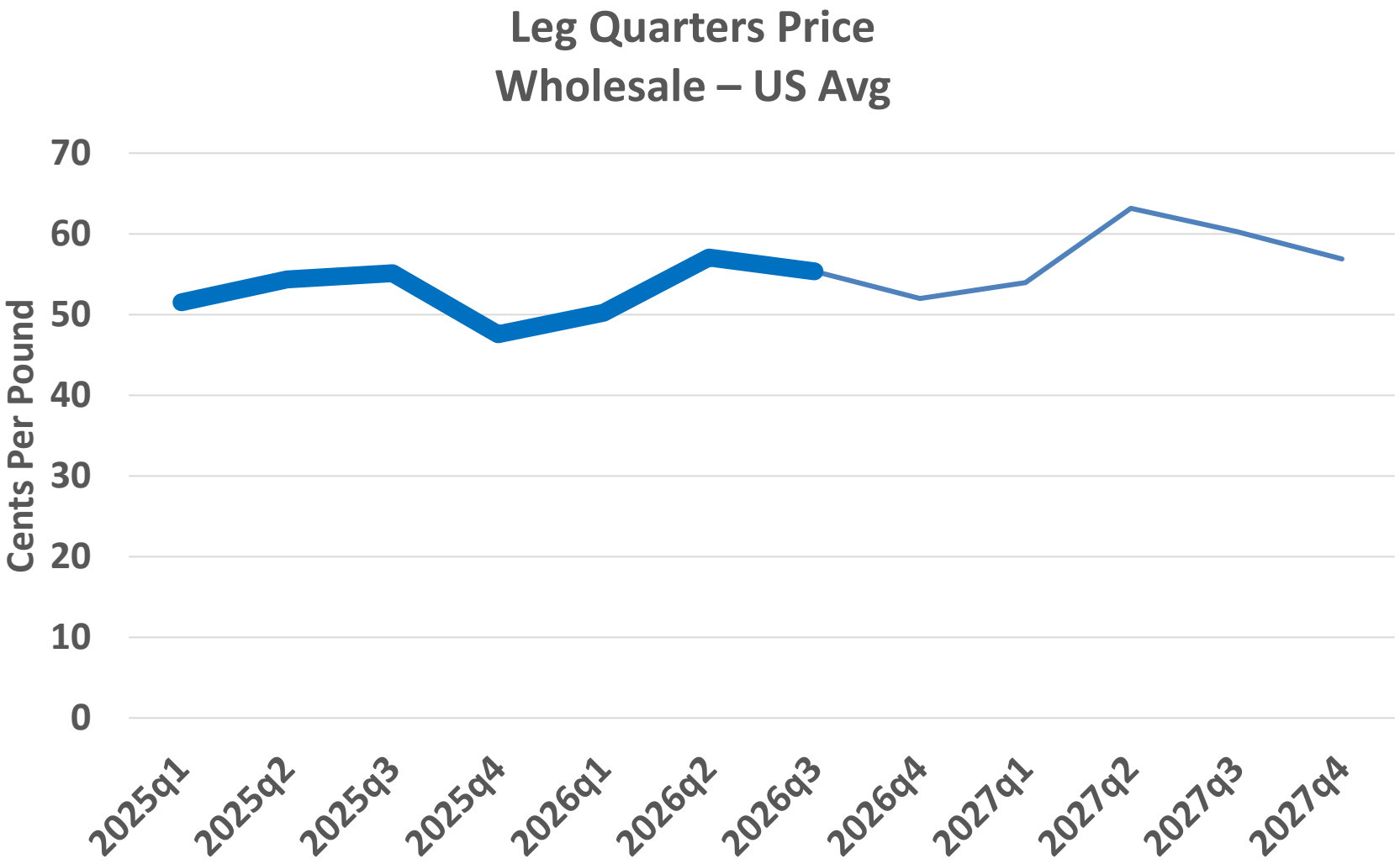
Data Sources: USDA-NASS, USDA-ERS, Forecast: LMIC

Chicken Prices – Breast Meat



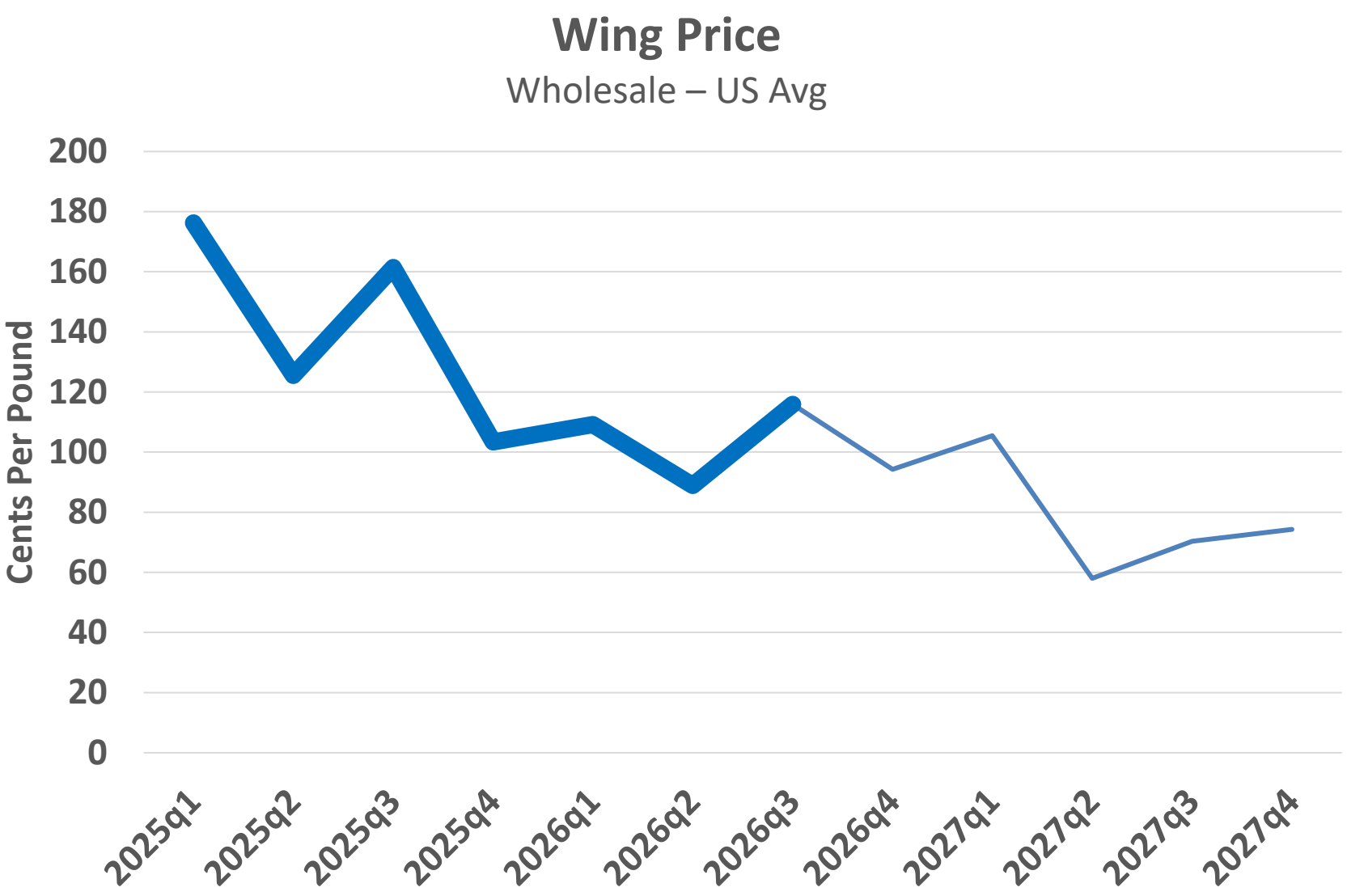
Data Sources: USDA-AMS, Forecast: LMIC

Chicken Prices – Leg Quarters



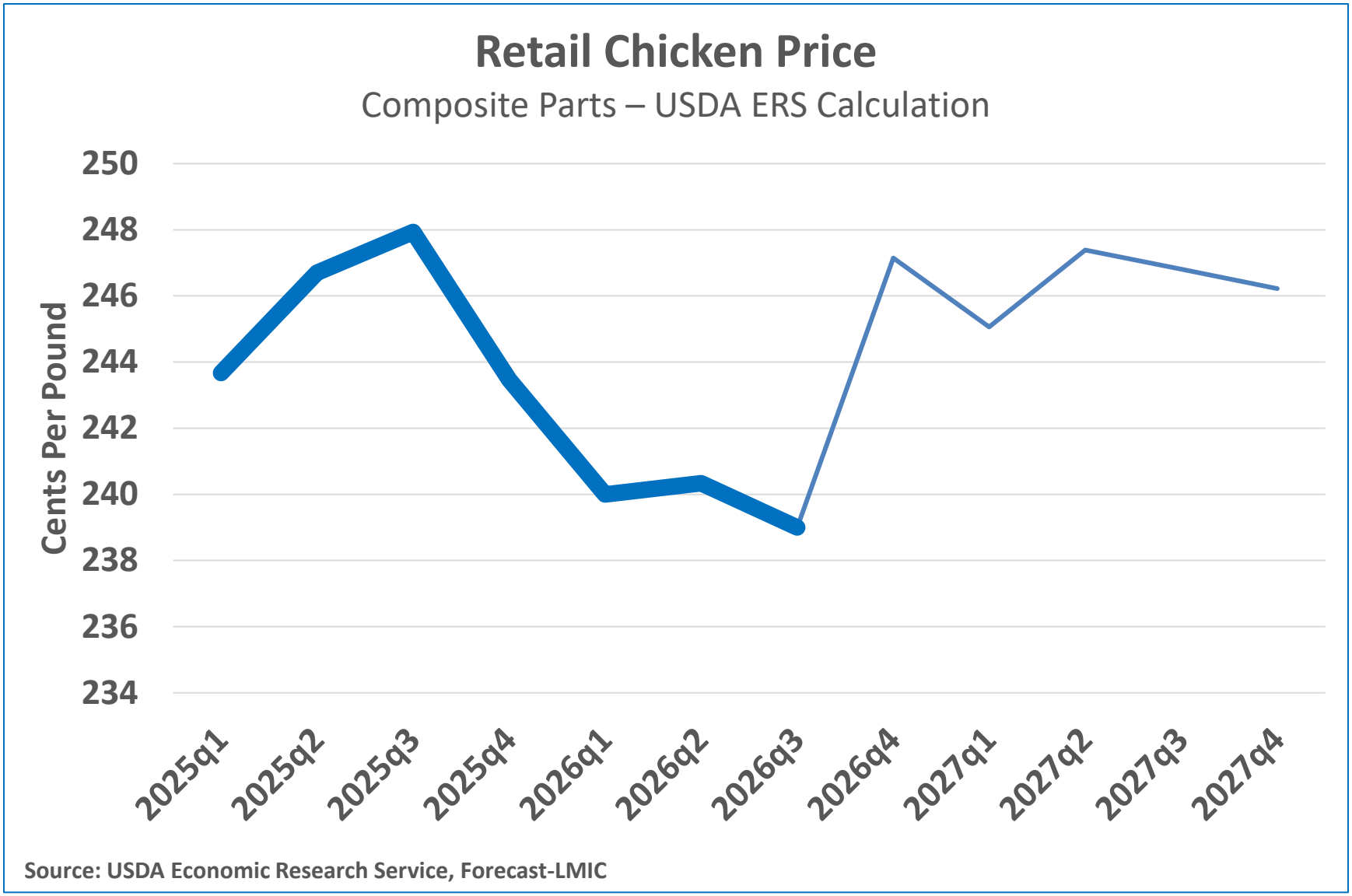
Source: USDA Agriculture Marketing Service, Forecast-LMIC

Chicken Prices – Wings

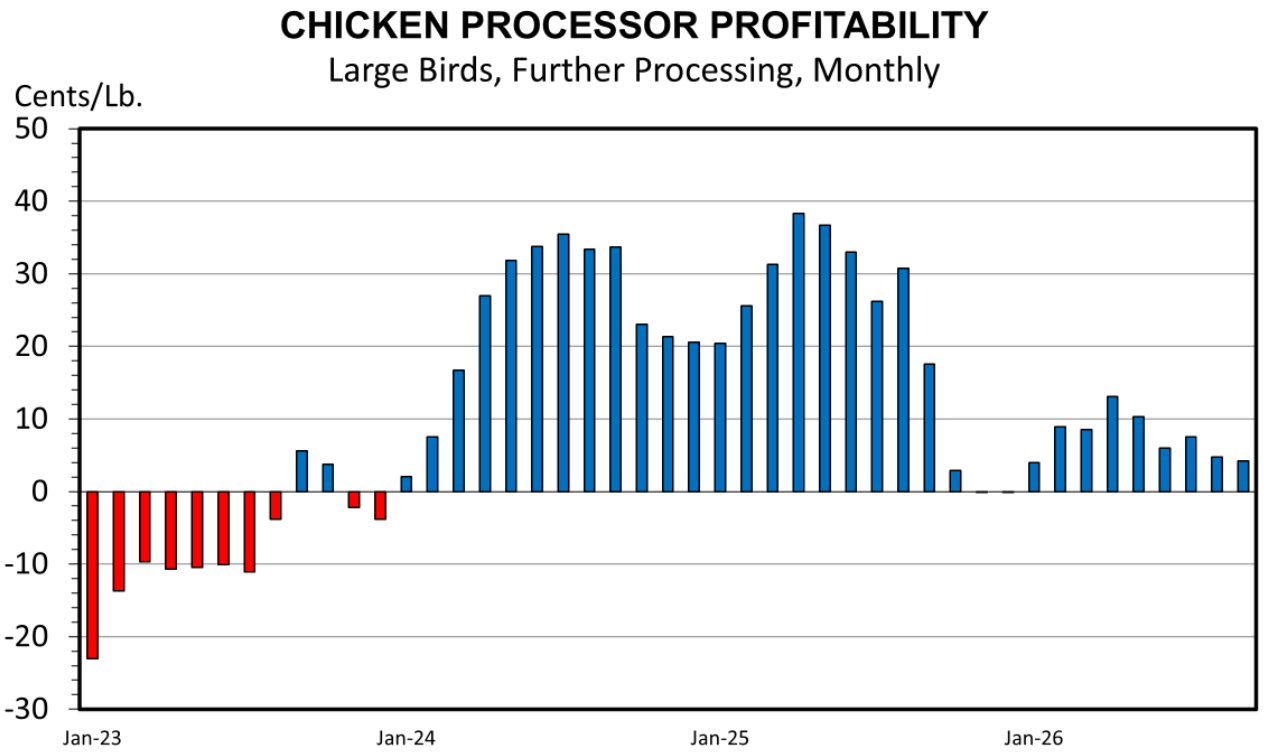


Source: USDA Agriculture Marketing Service, Forecast-LMIC

Chicken Prices – Retail Composite



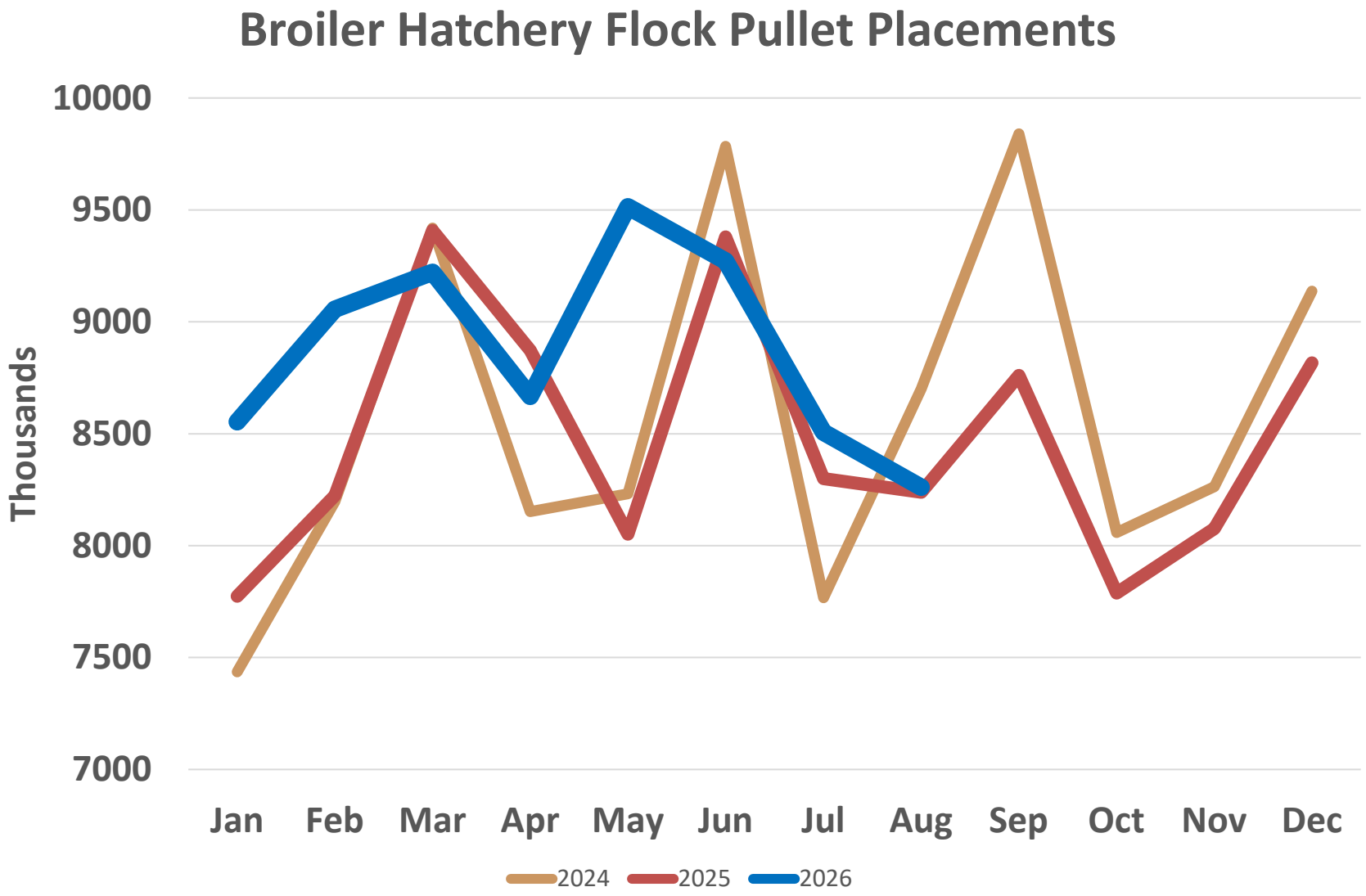
Chicken Processor Margins



Data Source: USDA-AMS

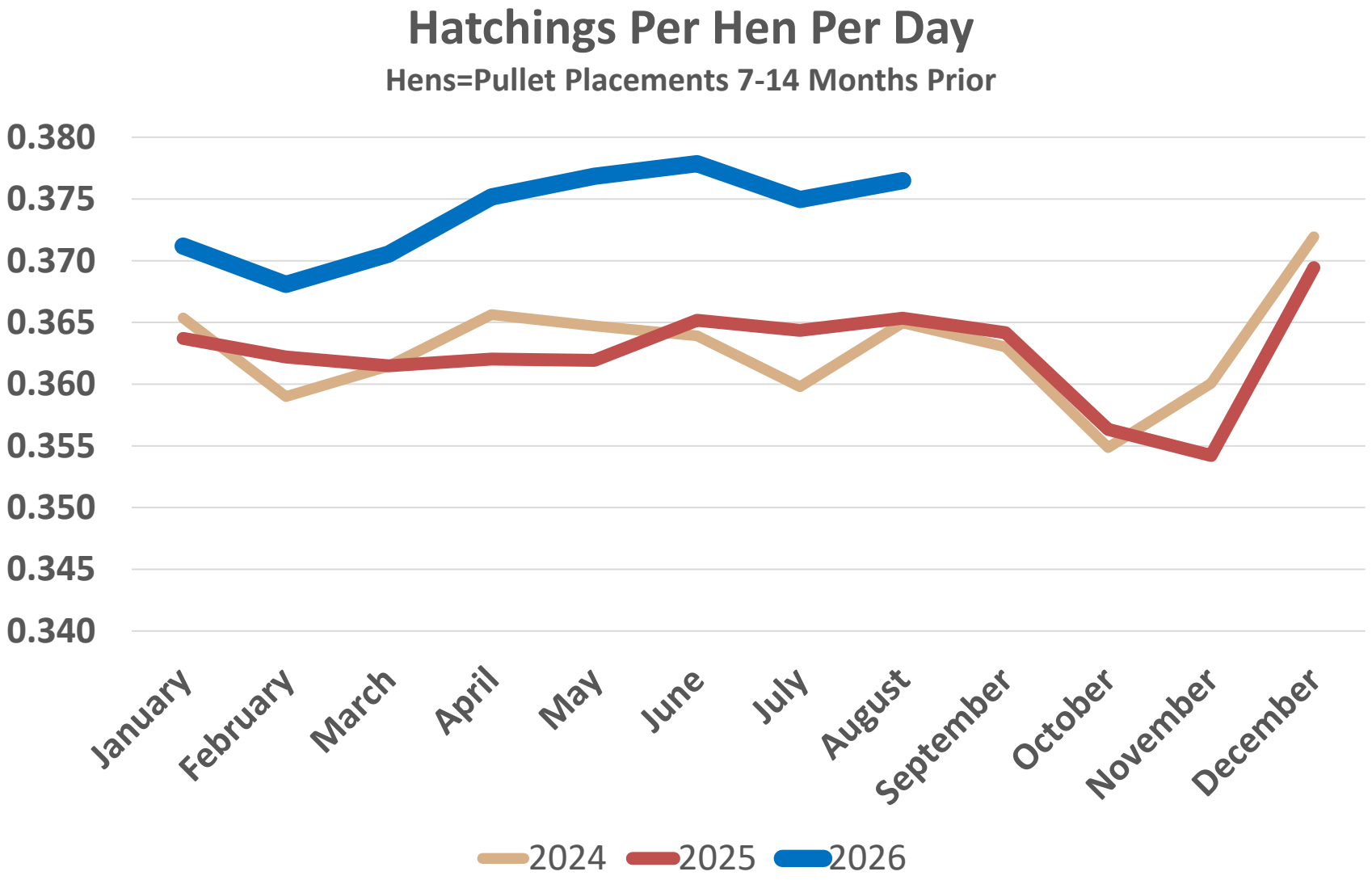
Livestock Marketing Information Center

Chicken Pullet Placements



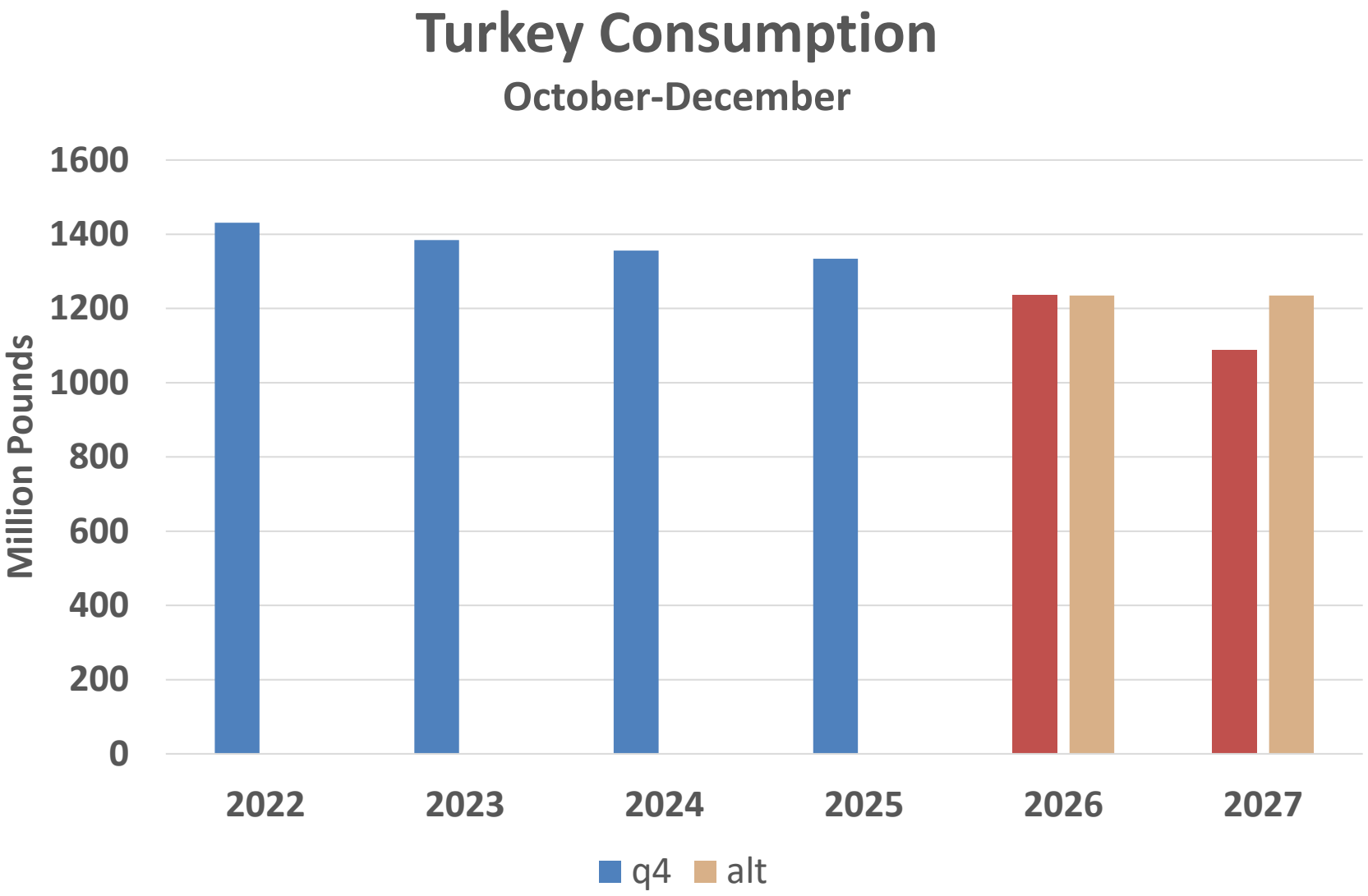
Data Source: USDA-NASS

Chicken Hatchery Productivity



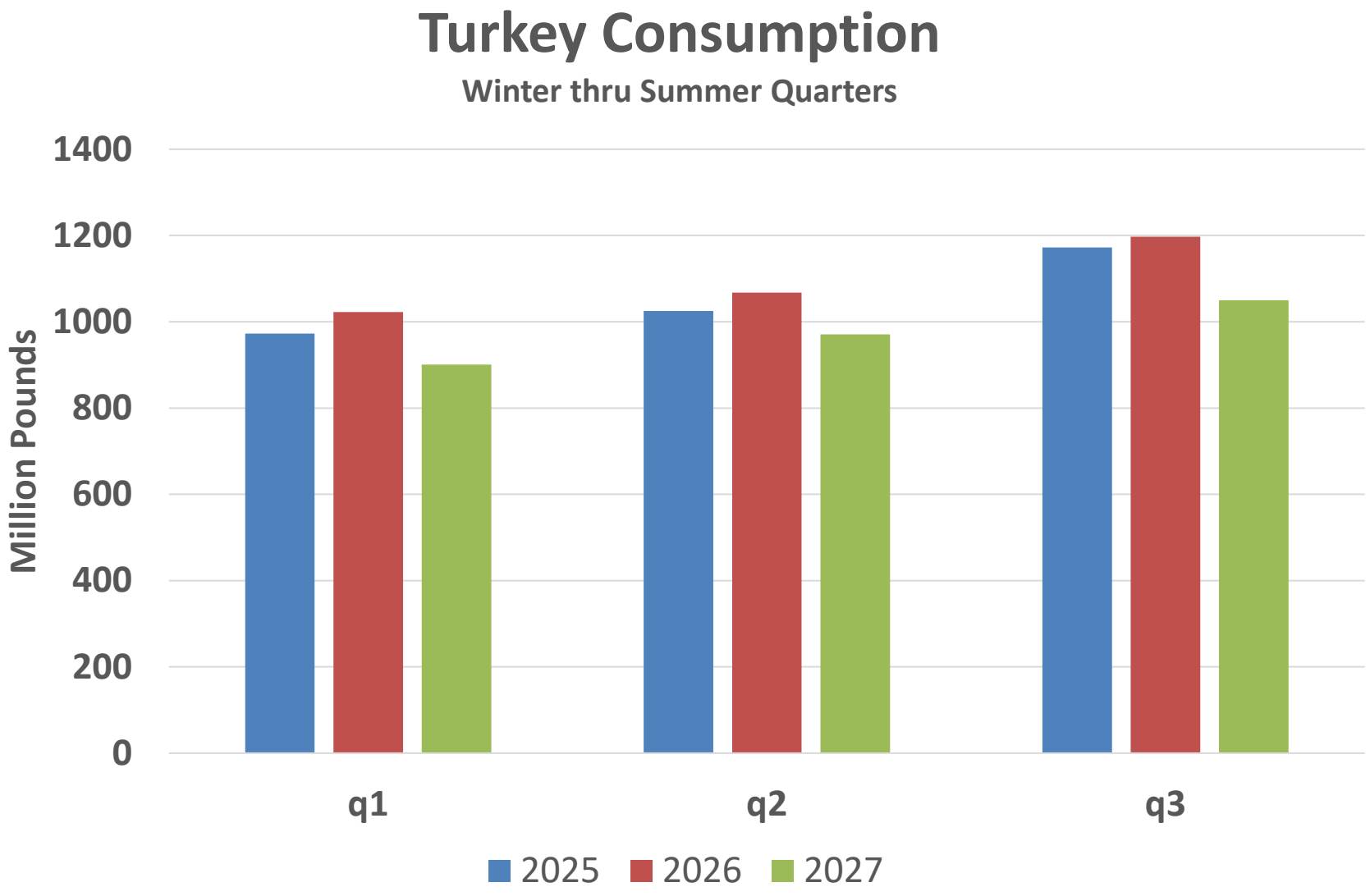
Data Sources: USDA-NASS

Turkey Consumption October-December



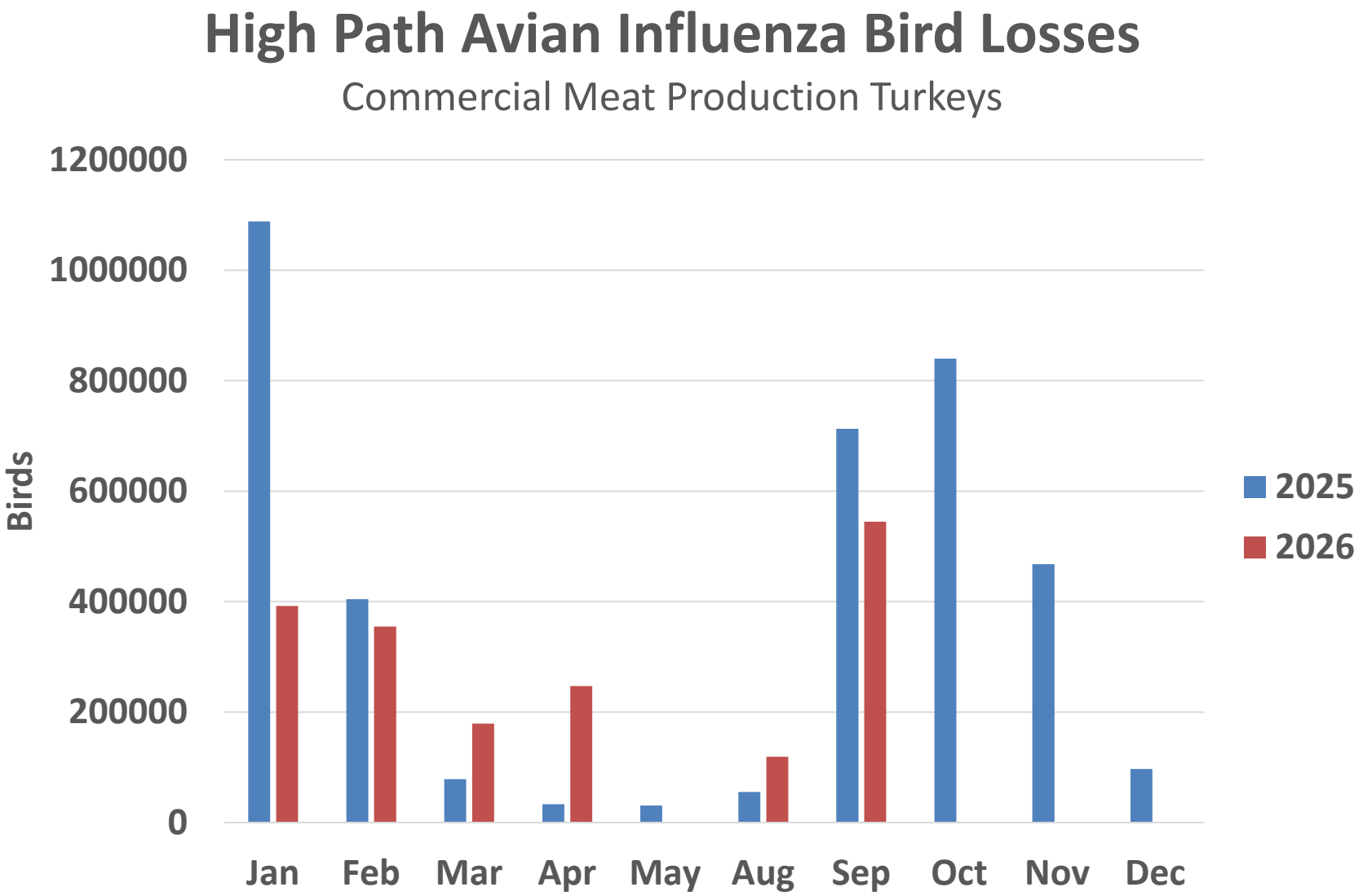
Data Sources: USDA-NASS, USDA-ERS, Forecast: LMIC

Turkey Consumption – Winter through Summer Quarter



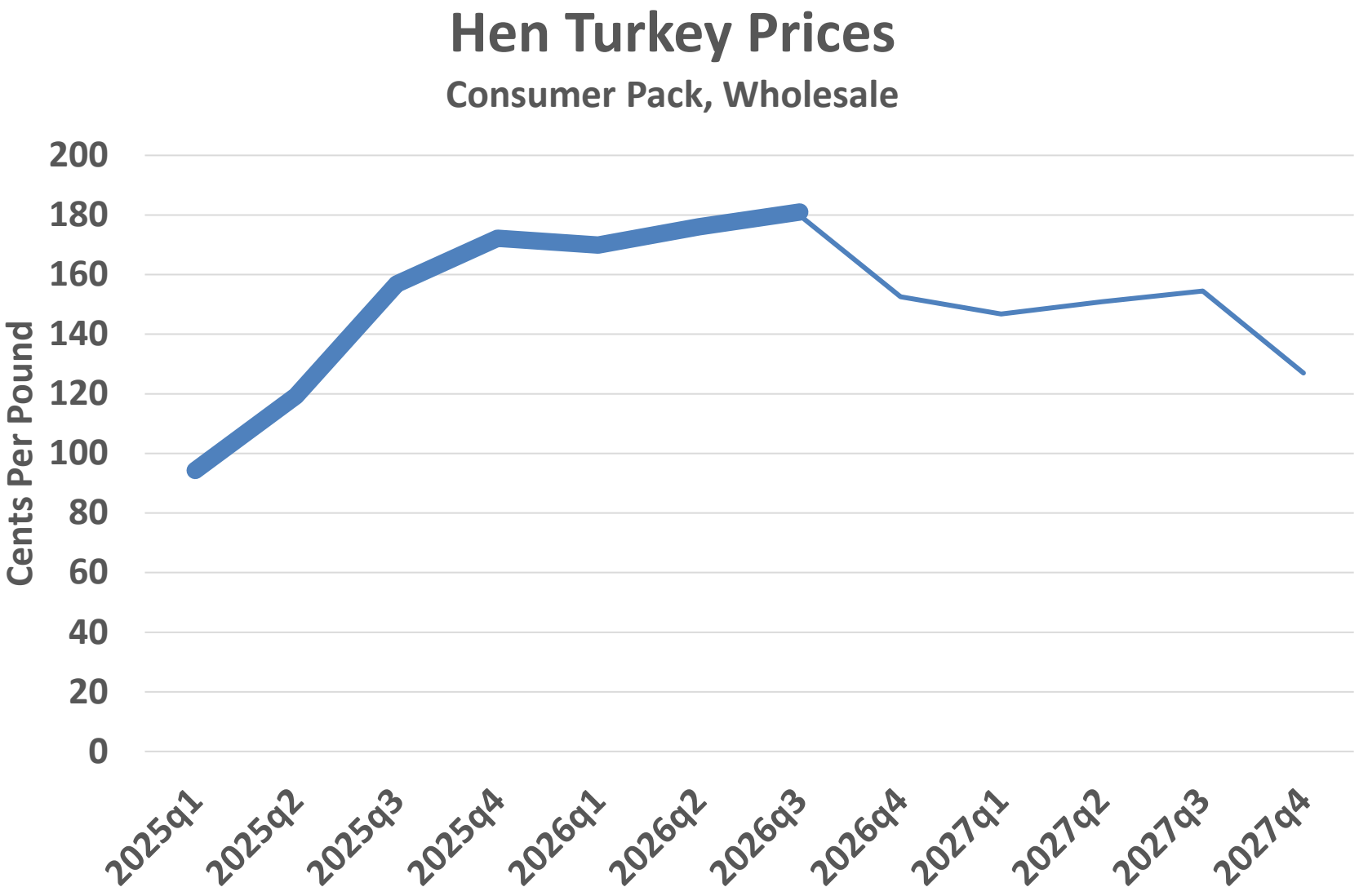
Data Sources: USDA-NASS, USDA-ERS, Forecast: LMIC

Turkeys – Avian Influenza



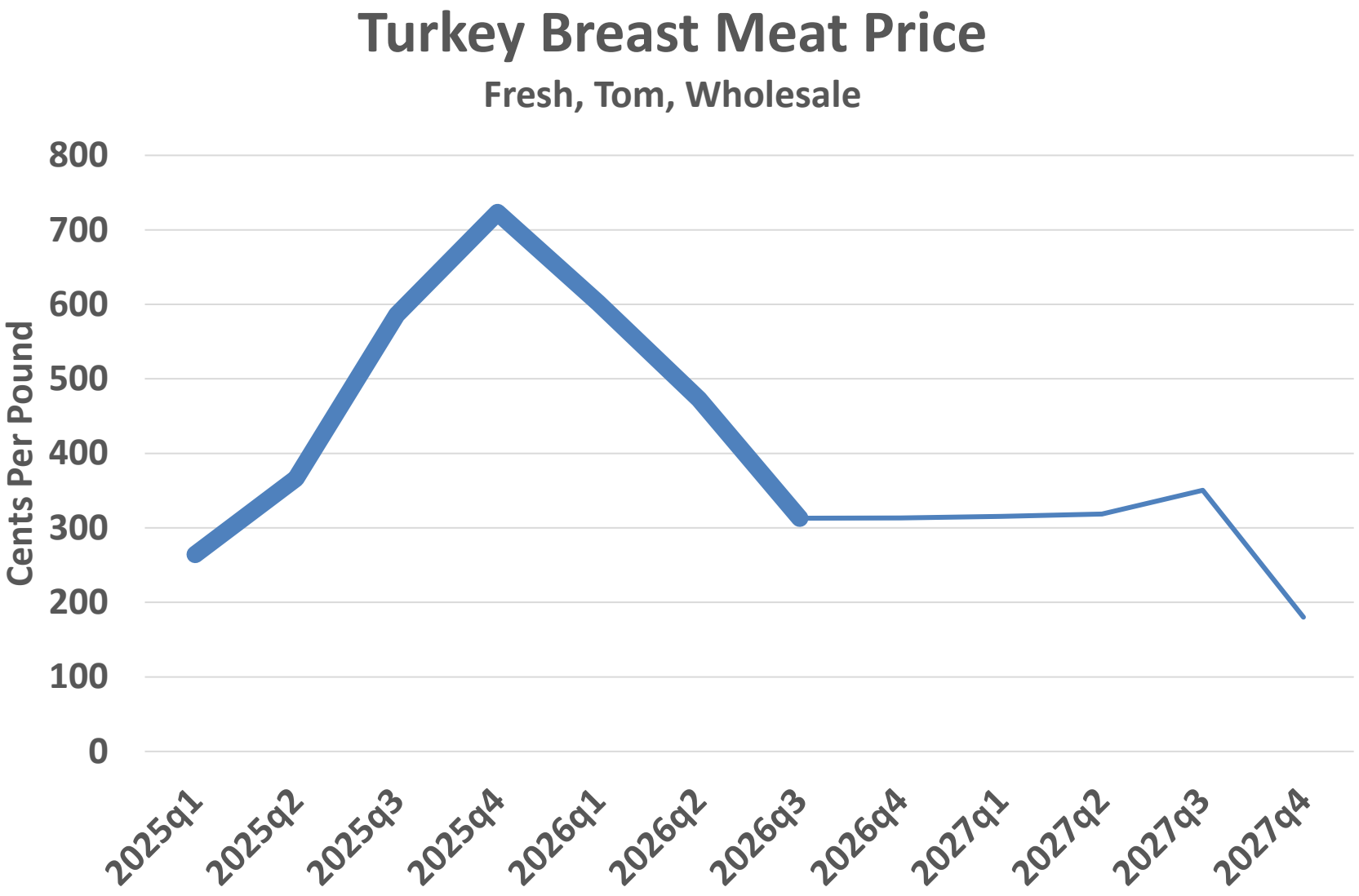
Data Source: USDA-APHIS

Turkey Prices – Hens



Source: USDA Agriculture Marketing Service, Forecast-LMIC

Turkey Prices – Breast Meat



Source: USDA Agriculture Marketing Service, Forecast-LMIC