

## Beef Marketplace Update – Full-Year 2025

Full-year 2025 retail snapshot from the National Cattlemen’s Beef Association, a contractor to the Beef Checkoff, highlights beef continuing to see record retail sales and intent to consume beef at the same level or more in the future.

### Beef Continues to Lead Fresh Meat in Retail Value Growth

- Beef remains the economic engine of the fresh meat case, showing **double-digit dollar growth across all major time periods**.
  - **52-week beef dollar sales:** \$45.1B, up **12.4%**
  - **Last 13-weeks:** up **11.3%**
  - **Last 4-weeks:** up **10.5%**
- This growth outperforms chicken, pork, and turkey, reinforcing beef’s premium position and ongoing consumer demand.

### Ground Beef is the Standout Growth Driver

- Beef Fresh Ground shows the strongest momentum among beef categories:
  - **Dollar sales up 14.1% (52-week)** and **16%+** in both the 13- and 4-week periods
  - **Volume also growing** modestly (+3.1% over 52 weeks) despite higher prices
  - **Price per pound up sharply** (10.6% to 15.2% increases)
- **Implication:** Consumers continue to shift toward ground formats for value and versatility

### Beef Steaks Sales Remain High, But Feeling Some Volume Pressure

- **Dollar sales up 10.2% (52-week)**  
Volume is softening:
  - **Volume down 3.4% (13-week)** and **down 6% (4-week)**
  - **Price increases** are significant (+7.7% to +8.6%), suggesting consumers are still buying—but at smaller quantities or selectively.
- **Implication:** Premium cuts remain resilient, though price sensitivity is increasing.

### Roasts, Brisket & Value-Add Categories Show Solid Momentum

- **Roasts**
  - Strong **price** and **volume** growth across all
  - Indicates ongoing interest in at-home cooking and meal prep.
- **Brisket**
  - Mixed signals: **dollar sales rising** (up 6–16%), but **volume uneven** (down in longer periods yet +8.6% in 4-week)
- **Value-Added Beef**
  - Consistently strong growth in both value and volume across all periods; **double-digit dollar growth** in 13- and 4-weeks
- **Implication:** Convenience-oriented beef products are gaining traction and likely attracting time-pressed consumers.

## Beef's Price Per Pound Continues to Climb

- Beef's average price per pound:
  - **\$7.22 (52-week), up 7.7%**
  - **\$7.40 (13-week), up 8.2%**
  - **\$7.67 (4-week), up 8.7%**
- Compared to other meats, beef remains the highest-priced protein but continues to sustain demand.

## Competitive Landscape: Beef Outperforms Other Proteins

- Across all timeframes:
  - **Chicken:** low-mid single-digit growth in dollars and volume
  - **Turkey & Pork:** flat to moderate growth; volume declines in recent periods
  - **Meat Alternatives:** sharp long-term declines in both value and volume
- **Implication:** The competitive set is holding steady relative to beef, offering producers more pricing power and category influence.

## Bottom Line for Beef

- **Beef is winning on value, holding volume, and commanding higher prices across the board.**
  - The category is healthy and growing, driven especially by ground beef and value-added offerings, while steaks remain premium but slightly pressured on volume. Pricing strength suggests consumers continue to prioritize beef.
  - This environment positions beef producers processors well for 2026—particularly those leaning into:
    - Ground beef and versatile formats
    - Value-added, convenience-focused products
    - Strategic pricing and mix optimization

## Total Value - Fresh Meat

Legacy Sub-Category	52-Week Dollar Sales		13-Week Dollar Sales		4-Week Dollar Sales	
	Current	% Change vs YA	Current	% Change vs YA	Current	% Change vs YA
<b>AISLE-FRESH MEAT</b>	79,497,673,951	9.1%	20,826,197,737	8.3%	6,659,030,811	7.9%
<b>BEEF</b>	45,060,105,529	12.4%	11,835,500,197	11.3%	4,090,173,652	10.5%
BEEF STEAKS	15,861,224,476	10.2%	3,589,967,116	4.5%	1,087,148,660	2.1%
BEEF FRESH GROUND	16,434,192,538	14.1%	4,226,739,717	16.0%	1,278,751,643	16.4%
BEEF ROAST	4,684,642,831	12.3%	1,780,743,184	10.8%	899,060,308	12.2%
BEEF BRISKET	658,947,079	6.2%	185,933,112	9.4%	74,096,555	16.6%
BEEF VALUE ADD	4,186,071,943	11.3%	1,045,039,209	13.6%	314,985,901	12.8%
<b>CHICKEN</b>	20,669,770,363	6.5%	4,997,422,180	6.0%	<b>1,465,107,871</b>	<b>4.4%</b>
<b>TURKEY</b>	3,347,459,401	3.9%	1,417,575,570	3.6%	<b>275,976,053</b>	<b>3.2%</b>
<b>PORK</b>	8,724,653,657	3.3%	2,149,821,714	3.6%	<b>671,367,024</b>	<b>3.1%</b>
<b>MEAT ALTERNATIVES</b>	276,206,572	-11.1%	65,383,783	-2.3%	22,483,282	13.3%

Source: Circana Multi-Market retail performance, period ending 12/28/2025

### Total Volume - Fresh Meat

Legacy Sub-Category	52-Week Volume Sales		13-Week Volume Sales		4-Week Volume Sales	
	Current	% Change vs YA	Current	% Change vs YA	Current	% Change vs YA
<b>AISLE-FRESH MEAT</b>	16,898,956,531	3.0%	4,670,369,815	2.1%	1,322,928,780	0.7%
<b>BEEF</b>	6,243,174,984	4.3%	1,599,186,961	2.9%	532,954,376	1.7%
BEEF STEAKS	1,435,229,418	2.3%	316,222,007	-3.4%	93,860,318	-6.0%
BEEF FRESH GROUND	2,883,136,856	3.1%	709,725,374	2.6%	212,858,057	1.0%
BEEF ROAST	696,736,863	7.5%	246,574,996	4.6%	113,454,798	4.7%
BEEF BRISKET	137,918,045	-7.2%	37,487,803	-2.4%	14,994,633	8.6%
BEEF VALUE ADD	638,888,435	8.7%	159,382,823	12.1%	48,472,709	11.7%
<b>CHICKEN</b>	6,514,901,830	3.2%	1,578,935,602	3.6%	460,299,998	1.4%
<b>TURKEY</b>	1,240,841,322	0.6%	779,050,828	0.4%	99,273,863	-5.7%
<b>PORK</b>	2,668,889,227	1.1%	655,312,156	-0.2%	209,456,467	-0.1%
<b>MEAT ALTERNATIVES</b>	34,339,544	-8.8%	8,040,944	0.5%	3,031,458	N/A

Source: Circana Multi-Market retail performance, period ending 12/28/2025

### Average Price Per Pound - Fresh Meat

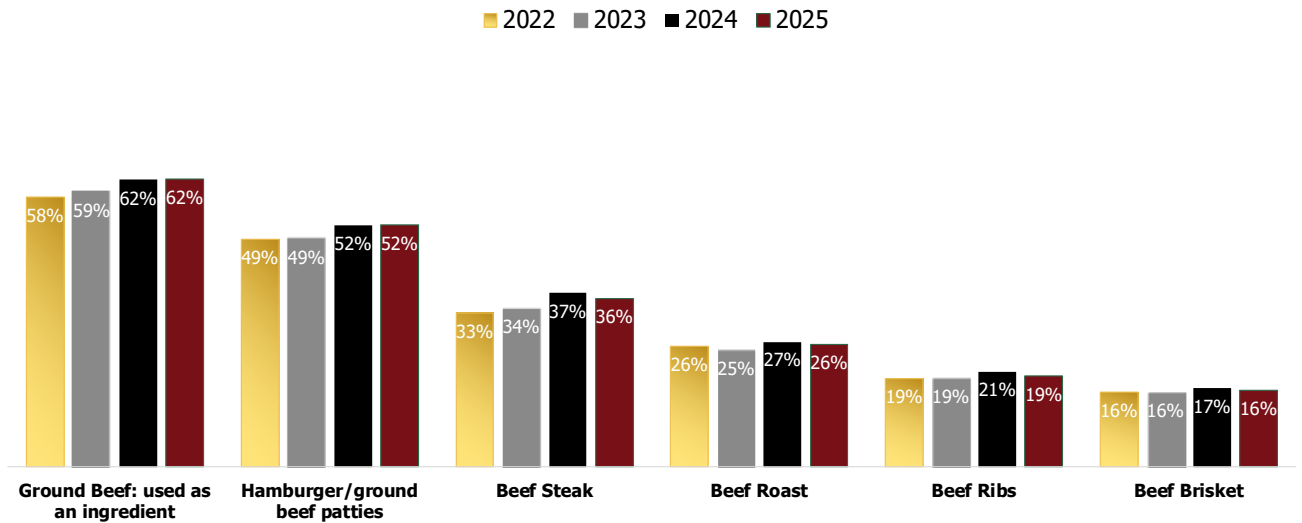
Legacy Sub-Category	52-Week Price per Volume		13-Week Price per Volume		4-Week Price per Volume	
	Current	% Change vs YA	Current	% Change vs YA	Current	% Change vs YA
<b>AISLE-FRESH MEAT</b>	\$4.70	5.9%	\$4.46	6.0%	\$5.03	7.1%
<b>BEEF</b>	\$7.22	7.7%	\$7.40	8.2%	\$7.67	8.7%
BEEF STEAKS	\$11.05	7.7%	\$11.35	8.2%	\$11.58	8.6%
BEEF FRESH GROUND	\$5.70	10.6%	\$5.96	13.1%	\$6.01	15.2%
BEEF ROAST	\$6.72	4.4%	\$7.22	5.9%	\$7.92	7.2%
BEEF BRISKET	\$4.78	14.4%	\$4.96	12.1%	\$4.94	7.3%
BEEF VALUE ADD	\$6.55	2.4%	\$6.56	1.3%	\$6.50	1.0%
<b>CHICKEN</b>	\$3.17	3.3%	\$3.17	2.3%	\$3.18	2.9%
<b>TURKEY</b>	\$2.70	3.3%	\$1.82	3.2%	\$2.78	9.4%
<b>PORK</b>	\$3.27	2.2%	\$3.28	3.9%	\$3.21	3.2%
<b>MEAT ALTERNATIVES</b>	\$8.04	-2.5%	\$8.13	-2.8%	\$7.42	-12.9%

Source: Circana Multi-Market retail performance, period ending 12/28/2025

As beef prices increase, consumers note maintaining or in some cases increasing their weekly consumption of beef at home. Consistent with retail sales performance, ground beef is the top choice either as an ingredient or as a patty for consumers eating at home on a weekly basis; a nod to ground beef’s value, convenience and versatility. While steak is seeing year-over-year price increases, weekly consumption of steak at home in the last week has either held steady or increased over the last four years, a testament to the premium quality product delivered through the retailer.

## Beef Eaten in Past Week at Home

Beef cuts most likely to be consumed align with consumer prioritization of convenience, versatility, and an attainable price point.



Source: Consumer Beef Tracker January 2023 – December 2025. BB5. In the past week, which of the following types of beef have you eaten at home? (Select all that apply). Analysis: National Cattlemen’s Beef Association, a contractor to the Beef Checkoff.