

Beef Marketplace Update – First 4-Weeks of 2026

First four weeks of 2026 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.

Executive Summary

- **Fresh meat retail is in a growth phase:** Dollar sales are up meaningfully across time windows, with the **most recent 4 weeks accelerating** versus the 52-week trend.
- **Beef is the growth engine in retail value:** Beef dollar sales outpace total fresh meat and the other legacy proteins across 52-week, 13-week, and 4-week views.
- **Volume is improving—especially recently:** Total fresh meat pounds are positive in the latest 13- and 4-week windows, and beef pounds are **up even more**, indicating demand resilience beyond just price inflation.
- **Price remains a key tailwind:** Average price/lb is higher across the board; beef is up mid-high single digits YoY depending on the window.

Consumers are maintaining or increasing at-home beef consumption despite higher prices, with **ground beef leading** due to value and versatility.

- **Beef detail: where is the growth coming from?**
 - **Ground beef:** \$16.67B (+14.6%) 52W; \$4.36B (+17.9%) 13W; \$1.49B (+19.2%) 4W.
 - **Beef steaks:** \$15.93B (+9.1%) 52W; \$3.59B (+4.5%) 13W; \$1.17B (+5.9%) 4W.
 - **Roasts:** \$4.75B (+12.5%) 52W; \$1.86B (+13.2%) 13W; \$0.43B (+15.6%) 4W.
 - **Brisket:** \$0.66B (+5.9%) 52W; \$0.18B (+17.3%) 13W; \$0.04B (+16.2%) 4W.
 - **Value-added beef:** \$4.23B (+11.4%) 52W; \$1.07B (+13.2%) 13W; \$0.36B (+12.0%) 4W.

Retailers are moving beef through **both “everyday” (ground, roasts) and premium (steaks)** channels, but **ground is the standout growth driver**, reinforcing the importance of trim and grinding demand.

- **Beef pounds (volume): strongest gains in roasts & value-add; steak volume softer**
 - **Total beef volume:** +4.2% (52W), +4.4% (13W), +6.3% (4W).
 - **Ground beef volume:** +3.3% (52W), +4.2% (13W), +5.7% (4W).
 - **Roast volume:** +7.9% (52W), +7.2% (13W), +11.5% (4W).
 - **Value-added volume:** +8.9% (52W), +11.6% (13W), +11.4% (4W).
 - **Steak volume:** +1.3% (52W) but **-2.7% (13W)** and **-0.9% (4W)**.
 - **Brisket volume:** -7.4% (52W) but +7.7% (13W), +5.3% (4W).

The most recent period shows **pounds growing for beef overall**, with especially strong momentum in **roasts and value-added**—categories that can benefit from convenience-led solutions. Steaks remain valuable in dollars but show **some near-term pound softness**, which is important when thinking about middle-meat demand and cutout dynamics.

Competitive context: how beef stacks up vs. other proteins

- **Chicken:** Dollar growth is positive but slower than beef (52W **+6.7%**, 4W **+8.2%**), and chicken prices are up modestly (4W \$3.26, **+3.3%**).
- **Pork:** Modest value and volume growth (4W dollars **+6.1%**, volume **+4.1%**) with relatively flat pricing (4W \$3.27, **+1.9%**).
- **Turkey:** A notable disconnect—4W price spikes to \$4.37 (**+14.1%**) while volume falls **-5.0%**.

Beef is competing well—even in a market where chicken and pork remain lower-priced proteins—because beef is delivering **both dollar and pound gains** overall.

Considerations & Implications

- Beef's **double-digit retail dollar growth** alongside **positive pound growth** suggests consumers are not trading away from beef in a meaningful way—supportive for downstream beef values and, indirectly, cattle markets (with the usual lags and supply-side caveats).
- Ground beef is the report's **highlighted at-home weekly staple**, and it's delivering the strongest dollar growth among major beef cuts, reinforcing the strategic importance of trim demand.
- Steaks remain very large in dollars and price per pound, but recent **pound declines** mean merchandising, promo strategy, and consumer affordability may be influencing near-term steak movement.
- Strong volume gains in **roasts and value-added** imply consumers are responding to **easy meal solutions** and potentially seasonal cooking patterns—good signals for programs aligned with convenience, pre-seasoned, and ready-to-cook formats.

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
AISLE-FRESH MEAT	80,188,107,326	9.1%	21,306,510,356	9.3%	6,636,876,247	11.4%
BEEF	45,533,114,980	12.2%	12,129,369,040	12.5%	3,773,353,313	14.1%
BEEF STEAKS	15,926,012,766	9.1%	3,591,929,084	4.5%	1,169,917,150	5.9%
BEEF FRESH GROUND	16,674,541,744	14.6%	4,361,738,033	17.9%	1,485,605,955	19.2%
BEEF ROAST	4,747,283,897	12.5%	1,860,467,469	13.2%	427,046,901	15.6%
BEEF BRISKET	663,101,078	5.9%	181,309,313	17.3%	40,041,351	16.2%
BEEF VALUE ADD	4,228,604,131	11.4%	1,071,663,190	13.2%	357,690,389	12.0%
CHICKEN	20,809,489,486	6.7%	5,133,762,902	6.4%	1,783,903,124	8.2%
TURKEY	3,366,886,903	4.3%	1,422,108,051	4.1%	237,633,383	8.4%
PORK	8,765,268,496	3.2%	2,171,255,306	4.4%	700,681,132	6.1%
MEAT ALTERNATIVES	282,837,325	-7.1%	74,543,887	12.3%	27,594,050	31.6%

Source: Circana Multi-Market retail performance, period ending 1/25/2026

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
AISLE-FRESH MEAT	16,971,726,324	0	4,744,119,495	3.0%	1,357,540,243	5.0%
BEEF	6,279,783,859	4.2%	1,642,227,719	4.4%	522,103,463	6.3%
BEEF STEAKS	1,434,504,659	1.3%	317,110,781	-2.7%	104,194,768	-0.9%
BEEF FRESH GROUND	2,900,984,202	3.3%	732,843,101	4.2%	249,335,619	5.7%
BEEF ROAST	704,015,493	7.9%	256,115,253	7.2%	64,795,863	11.5%
BEEF BRISKET	138,206,290	-7.4%	36,337,342	7.7%	7,932,682	5.3%
BEEF VALUE ADD	645,182,907	8.9%	163,939,456	11.6%	54,822,587	11.4%
CHICKEN	6,541,162,651	3.3%	1,607,181,523	3.9%	546,410,083	4.8%
TURKEY	1,239,376,287	0.2%	767,133,264	0.0%	54,350,467	-5.0%
PORK	2,677,318,341	1.0%	665,236,212	1.3%	214,530,738	4.1%
MEAT ALTERNATIVES	36,216,507	-1.7%	10,389,183	30.8%	4,426,196	73.5%

Source: Circana Multi-Market retail performance, period ending 1/25/2026

Average Price Per Pound - Fresh Meat

Legacy Sub-Category	52-Week Price per Volume	Price per Volume	13-Week Price per Volume		4-Week Price per Volume	Price per Volume
	Current	% Change vs YA	Current	% Change vs YA	Current	% Change vs YA
AISLE-FRESH MEAT	\$4.72	6.0%	\$4.49	6.1%	\$4.89	6.1%
BEEF	\$7.25	7.7%	\$7.39	7.7%	\$7.23	7.4%
BEEF STEAKS	\$11.10	7.7%	\$11.33	7.4%	\$11.23	6.8%
BEEF FRESH GROUND	\$5.75	10.9%	\$5.95	13.1%	\$5.96	12.8%
BEEF ROAST	\$6.74	4.3%	\$7.26	5.6%	\$6.59	3.7%
BEEF BRISKET	\$4.80	14.4%	\$4.99	9.0%	\$5.05	10.4%
BEEF VALUE ADD	\$6.55	2.4%	\$6.54	1.4%	\$6.52	0.6%
CHICKEN	\$3.18	3.3%	\$3.19	2.4%	\$3.26	3.3%
TURKEY	\$2.72	4.1%	\$1.85	4.1%	\$4.37	14.1%
PORK	\$3.27	2.2%	\$3.26	3.1%	\$3.27	1.9%
MEAT ALTERNATIVES	\$7.81	-5.5%	\$7.18	-14.2%	\$6.23	-24.2%

Source: Circana Multi-Market retail performance, period ending 1/25/2026

Weekly Beef Consumption by Generation

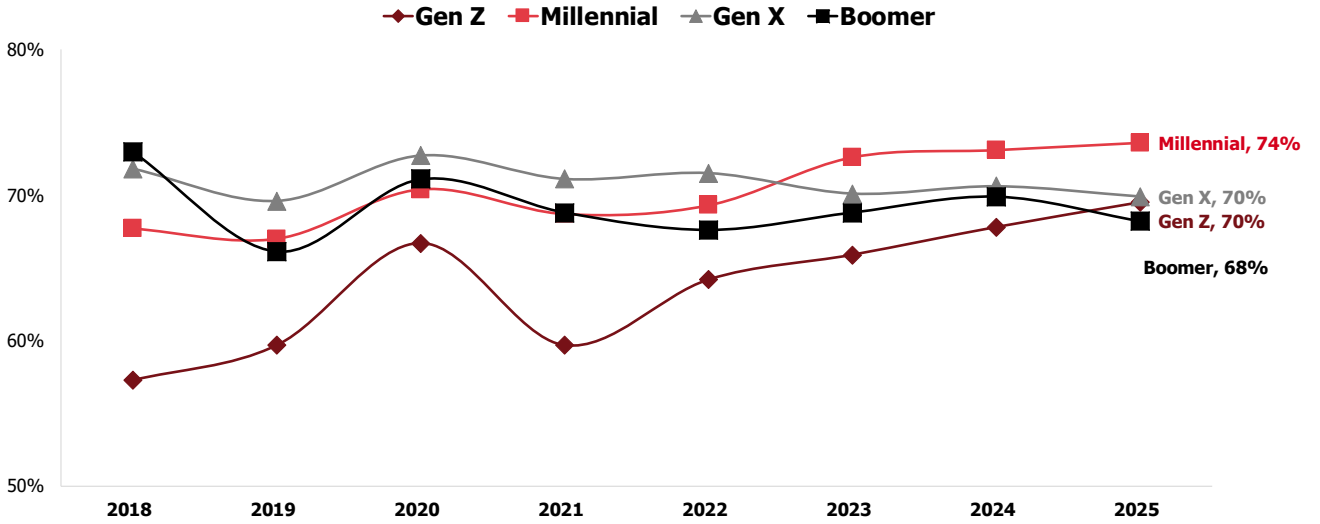
Across generations, **weekly beef consumption has increased since 2021**, with **Millennials and Gen Z showing the most consistent upward momentum**. This challenges older assumptions that younger cohorts are structurally moving away from beef and reinforces that beef remains relevant across age groups.

Implications

- Beef demand is **not generationally eroding**—it's **rebalancing by format and occasion**.
- **Ground beef and value-added formats** are the connective tissue across generations, particularly critical for Gen Z and Millennials.
- Steaks remain important in dollars, but **future volume growth skews younger and more convenience-led**.
- Reinforces retail data showing **ground beef as the primary growth engine** even as prices rise.

Weekly+ Beef Consumption by Generation

Both Millennial's and Gen Z's have shown consistent increases of weekly consumption of beef since 2021.



Source: Consumer Beef Tracker. 2019 – 2025. Q1: "Thinking about all of your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of food?" Analysis provided by National Cattlemen's Beef Association, a contractor to the Beef Checkoff