

Beef Marketplace Update – Four Weeks Ending 2/22/2026

Four week retail snapshot ending February 22, 2026 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.

Marketplace Overview

Marketplace performance over the past year reflects a meat department that remains **strong in value growth but increasingly pressured on volume**. Long-term (52-week) trends show solid dollar gains across total fresh meat and especially beef, which continues to act as the primary engine of category growth. Beef is up in dollars, volume, and price, signaling sustained consumer commitment despite higher costs. Chicken and pork contribute stability with modest gains over the year, while turkey presents softer long-run volume performance.

However, as we move into shorter timeframes—13 weeks and particularly the most recent 4 weeks—the marketplace shows signs of **slowing momentum**. Volume is showing declines across most proteins except beef, as price inflation persists, and total category dollar growth slows from +8.6% (52W) to +4.0% (4W). These patterns suggest consumers are becoming more price sensitive while still willing to pay elevated prices for select proteins, especially beef.

Looking ahead, **future protein expectations will likely hinge on the balance between inflationary pressure, consumer value-seeking behavior, and marketplace dynamics**. Beef should continue leading category value given its consistent year-over-year strength and relatively resilient volumes, though future gains may moderate as price growth cools. Chicken and pork are expected to remain important value players, and their short-term volume softness suggests retailers may lean more heavily into promotional strategies to maintain movement. Turkey’s recent price volatility—up more than 15%—combined with steep 4-week volume declines signals near-term headwinds until pricing stabilizes.

Overall, producers can expect a marketplace defined by **price-driven dollar performance and cautious consumer demand**, with opportunities emerging in value-added beef, ground beef, and competitively priced pork and chicken as shoppers navigate elevated price levels.

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	\$ 80,441,029,735	8.6%	\$ 20,915,490,528	8.0%	\$ 6,149,703,142	4.0%
BEEF	\$ 45,759,336,497	11.5%	\$ 12,158,753,952	10.7%	\$ 3,542,168,899	6.6%
BEEF STEAKS	\$ 15,953,442,031	8.0%	\$ 3,716,192,198	3.5%	\$ 1,228,164,807	2.0%
BEEF FRESH GROUND	\$ 16,810,588,602	14.2%	\$ 4,379,794,674	15.9%	\$ 1,351,409,197	11.1%
BEEF ROAST	\$ 4,761,095,959	11.6%	\$ 1,777,425,893	11.6%	\$ 337,708,444	3.8%
BEEF BRISKET	\$ 666,080,252	6.1%	\$ 170,740,019	15.1%	\$ 39,946,857	9.0%
BEEF VALUE ADD	\$ 4,249,375,793	10.9%	\$ 1,066,679,877	10.6%	\$ 329,498,596	6.0%
CHICKEN	\$ 20,822,556,963	6.1%	\$ 5,183,834,354	4.6%	\$ 1,622,277,460	0.6%
TURKEY	\$ 3,379,733,396	4.4%	\$ 956,342,187	5.0%	\$ 213,147,220	4.6%
PORK	\$ 8,760,369,889	2.9%	\$ 2,162,500,126	3.0%	\$ 646,539,909	-1.0%

Source: Circana Multi-Market retail performance, period ending 2/22/2026

Analysis: National Cattlemen’s Beef Association, a contractor to the Beef Checkoff.

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	16,956,853,083	2.5%	4,325,039,390	1.7%	1,243,473,074	-1.4%
BEEF	6,284,009,680	3.7%	1,640,469,009	3.1%	483,730,931	0.7%
BEEF STEAKS	1,432,132,311	0.4%	328,241,189	-3.0%	110,332,498	-2.5%
BEEF FRESH GROUND	2,902,150,357	3.0%	735,355,112	2.8%	227,965,821	0.4%
BEEF ROAST	704,835,303	7.2%	245,432,576	5.8%	51,987,138	1.0%
BEEF BRISKET	138,247,467	-7.3%	34,232,475	5.7%	8,125,025	1.4%
BEEF VALUE ADD	647,958,303	8.5%	162,859,681	9.7%	49,794,109	5.5%
CHICKEN	6,528,835,713	2.7%	1,607,280,127	1.5%	498,959,819	-2.6%
TURKEY	1,234,913,142	-0.4%	348,434,690	-2.6%	45,470,520	-10.5%
PORK	2,674,243,028	0.9%	666,341,873	1.0%	198,305,142	-1.7%

Source: Circana Multi-Market retail performance, period ending 2/22/2026

Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

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
AISLE-FRESH MEAT	\$4.74	5.9%	\$4.84	6.1%	\$4.95	5.6%
BEEF	\$7.28	7.6%	\$7.41	7.4%	\$7.32	5.9%
BEEF STEAKS	\$11.14	7.6%	\$11.32	6.7%	\$11.13	4.6%
BEEF FRESH GROUND	\$5.79	10.9%	\$5.96	12.7%	\$5.93	10.6%
BEEF ROAST	\$6.75	4.2%	\$7.24	5.5%	\$6.50	2.8%
BEEF BRISKET	\$4.82	14.4%	\$4.99	8.8%	\$4.92	7.5%
BEEF VALUE ADD	\$6.56	2.3%	\$6.55	0.8%	\$6.62	0.4%
CHICKEN	\$3.19	3.3%	\$3.23	3.1%	\$3.25	3.3%
TURKEY	\$2.74	4.9%	\$2.74	7.7%	\$4.69	16.8%
PORK	\$3.28	2.0%	\$3.25	2.0%	\$3.26	0.7%

Source: Circana Multi-Market retail performance, period ending 2/22/2026

Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

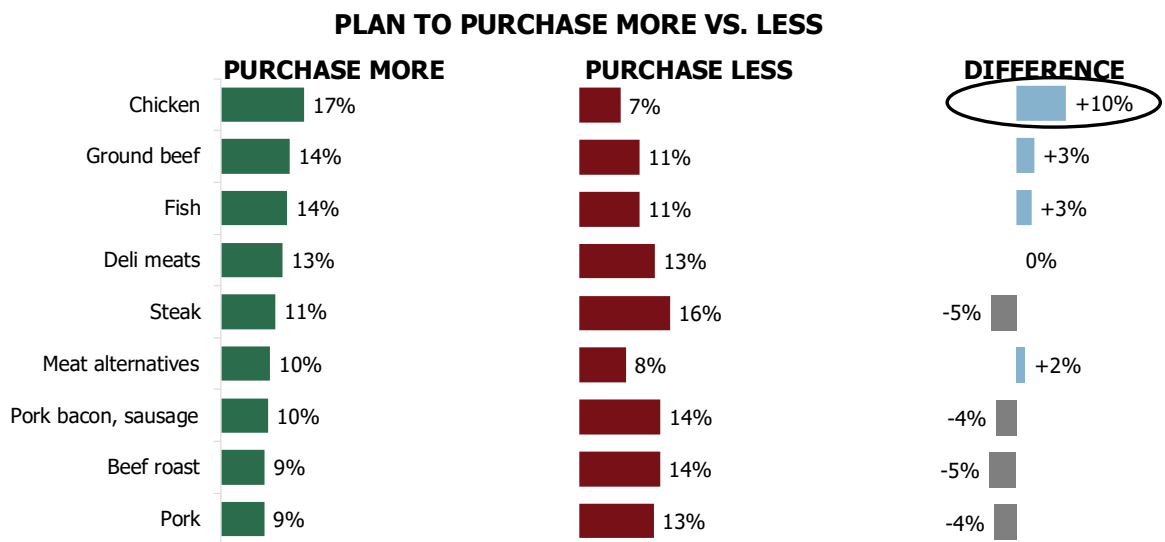
Consumer Impact

The marketplace data shows a meat department experiencing **strong dollar growth but increasingly pressured volumes**, particularly in the most recent 4-week period where consumers are displaying heightened **price sensitivity** and shifting toward proteins that deliver stronger value. Beef continues to outperform on both dollars and volume, but that strength is concentrated in **ground beef and value-added items**, while higher-priced cuts like **steaks** are beginning to show signs of softening sales. Chicken and pork serve as important value anchors but saw **short-term volume softness**, and turkey is facing the sharpest pressure with **double-digit 4-week volume declines** amid significant price increases. These conditions create an environment where consumers are becoming more selective—still purchasing meat, but showing clearer preferences for affordable proteins.

Consumers signal plans to **buy more chicken, ground beef, and fish**, while **cutting back on higher-priced cuts** like beef roasts and steaks—mirroring the volume declines amid price increases in the recent 4-week marketplace data. Their intent to increase purchases of **value-forward proteins** (chicken, ground beef) reinforces the trend toward **budget-conscious decision-making** driven by ongoing inflation. At the same time, the pullback on premium beef cuts tracks with the broader marketplace slowdown and suggests that while beef remains a category driver, future performance will likely depend on **shifts** into more affordable offerings rather than broad-based strength across all cuts. Taken together, the chart supports the expectation that **value-oriented proteins and cuts will lead near-term growth**, while premium items may face headwinds until price pressures ease.

Future Purchasing Plans of Proteins: 2025

Consumers indicate they plan to purchase more chicken, ground beef, and fish, while cutting back on higher-priced cuts of beef such as roast and steak compared to last year.



Source: Consumer Beef Tracker, January–December 2025. Q23: For each of the following items, please select whether you plan to purchase more, less, or the same amount, compared to 2024. Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.