

Beef Marketplace Update – Four Weeks Ending 3/22/2026

Four week retail snapshot ending March 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

Value Performance:

Beef continues to outperform the total fresh meat aisle on a dollar basis, reinforcing its role as the primary revenue driver at retail. Over the latest four weeks, beef generated **\$3.67 billion in sales, up 7.8% year over year**, well ahead of total fresh meat growth (+5.8%) and stronger than chicken (+3.3%) and pork (+1.1%). On a longer view, beef dollar sales are up **11.0% over the last 52 weeks**, reflecting sustained consumer willingness to spend on beef despite higher prices. Fresh ground beef remains the backbone of value growth, delivering double-digit dollar increases across all measured periods, while brisket stands out as a seasonal accelerator with **+35.4% four-week dollar growth**, underscoring strong demand for grilling and smoking occasions.

Volume Trends:

Beef’s value leadership is not solely price-driven—volume growth remains steady and competitive. Beef volumes increased **2.7% over the most recent four weeks**, exceeding total fresh meat growth (+0.7%) and outperforming chicken (-0.1%) and turkey (-8.4%). Ground beef continues to anchor consumption, posting nearly **3% volume growth across 4, 13, and 52-week views**, signaling everyday relevance and affordability within the beef complex. While steaks show modest volume softness, growth in roasts, value-added beef, and a four-week rebound in brisket volume (**+40.7%**) suggest shifting cut selection rather than declining demand, aligning beef usage with evolving meal and occasion needs.

Price Dynamics:

Beef prices remain elevated but are moderating in a way that supports continued demand. The four-week average beef price held at **\$7.11 per pound, up 5.0% year over year**, below the 52-week inflation rate (+7.4%), indicating improving price balance. This pricing environment—combined with positive volume trends—signals that consumers continue to see strong value in beef relative to alternatives. Fresh ground beef prices remain below the category average although outpacing price increases of other beef cuts, reinforcing its role as the entry point for beef shoppers. Compared to meat alternatives, which remain significantly higher priced and continue to lose volume, beef’s price-value continues to resonate and sustain category momentum.

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	\$ 80,775,130,959	8.3%	\$ 20,751,880,206	7.8%	\$ 6,253,960,085	5.8%
BEEF	\$ 46,030,653,542	11.0%	\$ 12,073,117,307	10.5%	\$ 3,671,117,190	7.8%
BEEF STEAKS	\$ 15,971,857,467	6.9%	\$ 3,878,235,368	3.5%	\$ 1,182,859,843	1.3%
BEEF FRESH GROUND	\$ 16,955,085,888	14.1%	\$ 4,445,952,084	14.4%	\$ 1,326,672,649	12.2%
BEEF ROAST	\$ 4,772,243,475	11.2%	\$ 1,362,283,882	13.7%	\$ 320,382,106	5.0%
BEEF BRISKET	\$ 678,638,844	7.5%	\$ 157,323,829	21.7%	\$ 52,599,281	35.4%
BEEF VALUE ADD	\$ 4,288,085,458	10.8%	\$ 1,284,674,246	8.5%	\$ 525,722,299	7.1%
CHICKEN	\$ 20,875,135,722	5.9%	\$ 5,341,093,495	4.2%	\$ 1,602,340,084	3.3%
TURKEY	\$ 3,401,104,943	5.1%	\$ 739,109,050	8.8%	\$ 211,844,808	8.9%
PORK	\$ 8,771,407,265	2.8%	\$ 2,165,910,269	2.5%	\$ 637,302,406	1.1%
MEAT ALTERNATIVES	\$ 257,115,290	-9.7%	\$ 62,019,405	-1.9%	\$ 18,842,080	-2.3%

Source: Circana Multi-Market retail performance, period ending 3/22/2026
 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	16,961,840,310	2.3%	4,195,183,347	1.8%	1,263,364,210	0.7%
BEEF	6,298,329,932	3.4%	1,656,873,825	3.8%	516,625,988	2.7%
BEEF STEAKS	1,429,558,018	-0.5%	344,473,898	-2.0%	105,213,270	-2.6%
BEEF FRESH GROUND	2,908,536,765	2.8%	746,528,456	3.0%	222,552,324	2.9%
BEEF ROAST	704,425,877	6.9%	198,298,371	8.5%	48,449,873	0.9%
BEEF BRISKET	141,864,393	-5.0%	32,916,629	17.3%	11,857,766	40.7%
BEEF VALUE ADD	650,428,867	8.3%	208,031,033	5.8%	92,528,141	2.3%
CHICKEN	6,528,467,444	2.5%	1,644,868,704	0.9%	492,196,277	-0.1%
TURKEY	1,231,385,158	-0.6%	172,342,534	-4.8%	44,575,944	-8.4%
PORK	2,675,636,050	0.9%	663,311,676	1.1%	192,456,729	0.2%
MEAT ALTERNATIVES	29,721,426	-10.6%	7,017,551	-3.8%	2,097,701	-4.1%

Source: Circana Multi-Market retail performance, period ending 3/22/2026
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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	\$4.76	5.9%	\$4.95	5.9%	\$4.95	5.1%
BEEF	\$7.31	7.4%	\$7.29	6.5%	\$7.11	5.0%
BEEF STEAKS	\$11.17	7.4%	\$11.26	5.6%	\$11.24	4.0%
BEEF FRESH GROUND	\$5.83	10.9%	\$5.96	11.1%	\$5.96	9.0%
BEEF ROAST	\$6.77	4.0%	\$6.87	4.8%	\$6.61	4.1%
BEEF BRISKET	\$4.78	13.1%	\$4.78	3.7%	\$4.44	-3.8%
BEEF VALUE ADD	\$6.59	2.3%	\$6.18	2.6%	\$5.68	4.7%
CHICKEN	\$3.20	3.4%	\$3.25	3.3%	\$3.26	3.4%
TURKEY	\$2.76	5.8%	\$4.29	14.3%	\$4.75	18.9%
PORK	\$3.28	1.9%	\$3.27	1.4%	\$3.31	1.0%
MEAT ALTERNATIVES	\$8.65	1.0%	\$8.84	1.9%	\$8.98	1.9%

Source: Circana Multi-Market retail performance, period ending 3/22/2026
 Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

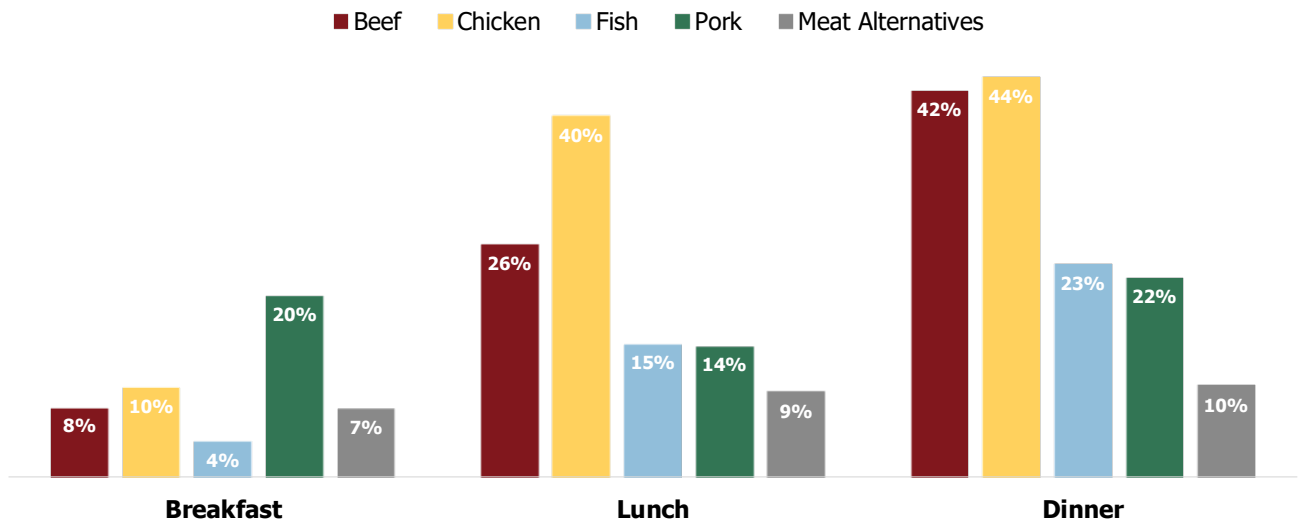
Beef's Role At the Dinner Table

Even in a high-price environment, beef continues to earn its place as one of the top proteins of choice at dinner. The four-week average beef price of **\$7.11 per pound (+5.0%)** reflects moderating inflation that is now running below the 52-week trend, helping maintain affordability without sacrificing value perception. Consumers are clearly signaling that beef delivers what dinner requires: satisfaction, flavor, and a

center-of-the-plate experience. This is reinforced by occasion data showing beef as a top choice at dinner, aligning premium value with the most important meal of the day.

Protein Consumed Yesterday at Each Meal

Pork is the top protein choice at breakfast. Chicken and beef lead at dinner.



Source: Consumer Beef Tracker January– December 2025. Q5a/c/e: "Which of the following proteins did you have for breakfast/lunch/dinner yesterday?"
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

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