

## Beef Marketplace Update – Four Weeks Ending 4/19/2026

Four week retail snapshot ending April 19, 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.

Over the most recent four weeks ending April 19, beef continued to lead the fresh-meat case in dollar performance. Beef retail dollar sales reached \$3.56B, up 7.5% year over year—well ahead of chicken’s \$1.58B (+2.7%) and pork’s \$0.63B (down 0.6%), with turkey at \$0.22B (+4.3%). In other words, beef is still capturing the biggest share of the consumer’s fresh-protein spend, and it is growing faster than competing proteins on a value basis in the near term.

The four-week volume trend shows beef demand holding steady, but with more of the growth coming from price than pounds. Beef volume totaled 472.7M lb, up 1.2% from a year ago, versus chicken at 506.9M lb (+1.3%) and pork at 194.2M lb (down 2.7%); turkey volume fell to 51.6M lb (down 10.9%). Steaks were the soft spot for beef in the latest four weeks (107.0M lb, down 4.0%), while fresh ground remained steady in volume (214.1M lb, flat year over year) and brisket posted volume gains off a smaller base (+18.1%).

Pricing remains the key driver separating beef from other proteins. Beef’s four-week average retail price was \$7.54/lb, up 6.3% year over year, compared to chicken at \$3.12/lb (+1.3%) and pork at \$3.26/lb (+2.2%); turkey averaged \$4.32/lb (+17.1%). That price strength, paired with positive beef volume, signals consumers are still accepting higher beef prices—though the steak volume decline is a reminder that middle-meat price points can be the first area to show resistance when budgets tighten.

### Marketplace Overview

#### 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>	\$ 81,207,537,006	8.2%	\$ 20,468,522,960	7.3%	\$ 6,171,945,318	5.2%
<b>BEEF</b>	\$ 46,363,715,846	10.9%	\$ 11,854,542,562	9.7%	\$ 3,563,696,604	7.5%
BEEF STEAKS	\$ 15,999,986,015	6.1%	\$ 3,936,419,299	2.7%	\$ 1,219,813,299	1.8%
BEEF FRESH GROUND	\$ 17,079,076,922	13.8%	\$ 4,424,563,486	14.2%	\$ 1,304,384,433	10.2%
BEEF ROAST	\$ 4,806,388,474	11.3%	\$ 1,163,246,845	8.3%	\$ 389,278,787	7.9%
BEEF BRISKET	\$ 686,533,902	8.8%	\$ 165,676,475	23.2%	\$ 62,179,422	17.6%
BEEF VALUE ADD	\$ 4,308,576,087	10.3%	\$ 1,267,779,272	8.4%	\$ 306,078,825	4.8%
<b>CHICKEN</b>	\$ 20,936,706,802	5.8%	\$ 5,323,480,213	4.4%	\$ 1,583,394,513	2.7%
<b>TURKEY</b>	\$ 3,410,398,543	5.0%	\$ 715,730,333	7.9%	\$ 222,868,495	4.3%
<b>PORK</b>	\$ 8,778,033,247	2.7%	\$ 2,109,674,838	1.7%	\$ 632,783,050	-0.6%

Source: Circana Multi-Market retail performance, period ending 4/19/2026

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
<b>AISLE-FRESH MEAT</b>	17,284,897,184	2.6%	4,202,868,399	2.2%	1,250,912,016	0.4%
<b>BEEF</b>	6,329,784,939	3.1%	1,627,635,632	3.7%	472,677,054	1.2%
BEEF STEAKS	1,431,166,705	-1.4%	350,647,776	-2.4%	106,985,458	-4.0%
BEEF FRESH GROUND	2,915,938,824	2.6%	738,658,454	3.5%	214,062,861	0.0%
BEEF ROAST	706,857,678	6.2%	174,135,974	4.1%	55,428,878	2.7%
BEEF BRISKET	144,307,260	-3.1%	35,178,705	21.5%	13,031,864	18.1%
BEEF VALUE ADD	651,434,640	7.1%	205,168,914	5.6%	45,500,097	3.1%
<b>CHICKEN</b>	<b>6,752,370,589</b>	<b>3.3%</b>	<b>1,697,723,785</b>	<b>2.0%</b>	<b>506,924,413</b>	<b>1.3%</b>
<b>TURKEY</b>	1,242,754,974	-1.2%	156,395,224	-8.2%	<b>51,567,141</b>	<b>-10.9%</b>
<b>PORK</b>	2,716,681,908	1.2%	651,852,051	0.4%	<b>194,225,314</b>	<b>-2.7%</b>

Source: Circana Multi-Market retail performance, period ending 4/19/2026

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
<b>AISLE-FRESH MEAT</b>	\$4.70	5.4%	\$4.87	5.0%	\$4.93	4.9%
<b>BEEF</b>	\$7.32	7.5%	\$7.28	5.8%	\$7.54	6.3%
BEEF STEAKS	\$11.18	7.5%	\$11.23	5.3%	\$11.40	6.0%
BEEF FRESH GROUND	\$5.86	11.0%	\$5.99	10.4%	\$6.09	10.2%
BEEF ROAST	\$6.80	4.7%	\$6.68	4.0%	\$7.02	5.0%
BEEF BRISKET	\$4.76	12.3%	\$4.71	1.5%	\$4.77	-0.4%
BEEF VALUE ADD	\$6.61	3.1%	\$6.18	2.6%	\$6.73	1.7%
<b>CHICKEN</b>	<b>\$3.10</b>	<b>2.5%</b>	<b>\$3.14</b>	<b>2.4%</b>	<b>\$3.12</b>	<b>1.3%</b>
<b>TURKEY</b>	\$2.74	6.2%	\$4.58	17.6%	<b>\$4.32</b>	<b>17.1%</b>
<b>PORK</b>	\$3.23	1.5%	\$3.24	1.3%	<b>\$3.26</b>	<b>2.2%</b>

Source: Circana Multi-Market retail performance, period ending 4/19/2026

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

The “**At Home Eating: 2025**” chart reinforces that consumers are still prioritizing **at-home meals** as a primary way to manage budgets—leaning on grocery (and value-driven meal planning) rather than relying solely on away-from-home occasions. The data suggest a more **routine, repeatable meal solutions** (weeknight staples), greater reliance on **leftovers and batch cooking**, and a stronger preference for items that feel like they “stretch” across multiple meals. For proteins, that tends to favor **versatile cuts and formats** that fit a wide range of dishes and price points.

At the same time, consumer behavior in an at-home environment is becoming more **strategic and price-aware**. Shoppers are more likely to **trade within the category** (for example, shifting from higher-priced cuts to more affordable options), pay closer attention to **features and promotions**, and compare proteins based on **price per**

**servicing** rather than only brand or habit. Even when consumers still want beef, economic pressure may push them toward **ground beef, roasts, and value-added/meal-solution items** versus higher-ticket steaks.

Looking ahead, **economic headwinds** (food inflation, interest rates/credit pressure, and general uncertainty) could amplify that behavior in the marketplace. The likely impacts are: (1) **more pronounced trading down** within beef (mix shift away from middle meats), (2) **higher promotional sensitivity** as retailers compete to hold traffic and basket size, and (3) continued opportunity for beef when it is positioned around **value, versatility, and “restaurant-quality at home”**—but with greater risk of demand resistance when retail prices move higher without a clear value story.

## At Home Eating: 2025

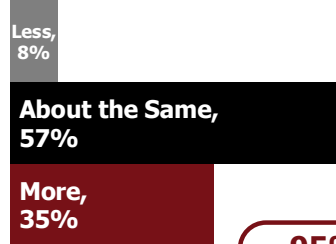
Three-quarters of meals are being cooked at home and 35% anticipate cooking more meals at home (and majority plan to continue doing so).



**74%**

Prepare or cook meals at home

### Change in At-Home Cooking Behavior



**95% of consumers cooking more meals at home plan to continue doing so.**

Source: Consumer Beef Tracker, January–December 2025. Q3. Thinking about the number of meals you are currently cooking at home, what percentage of your meals do you think you are preparing and/or cooking at home? Q4. Is (Q3/TotalSum) percent of meals prepared and/or cooked at home more, less or about the same as 6 months ago? Q4a. Do you expect to continue preparing and/or cooking more meals at home? Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

ARMS# 042726-15

