

## Beef Marketplace Update – Four Weeks Ending 6/14/2026

Retail snapshot ending June 14th, 2026 from the National Cattlemen’s Beef Association, a contractor to the Beef Checkoff, highlights beef continuing to see record retail sales throughout the first six months of 2026.

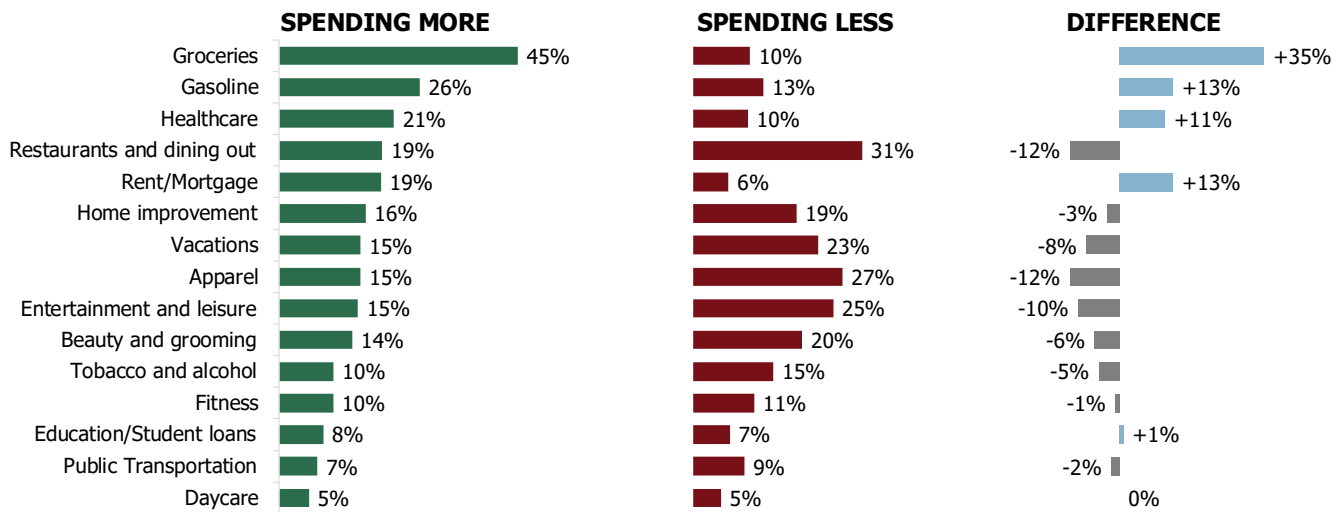
### Spending Behavior

When surveying consumers throughout 2025, there was an expectation of increased spending levels the next six months across staples such as groceries, gasoline, healthcare and rent/mortgage while decreased spending at restaurants, clothing and entertainment/leisure. Midway through 2026, consumers are experiencing increased inflationary pressure across a number of marketplace staples. According to the Bureau of Labor Statistics’ monthly inflation report, which includes data through May 2026, food prices increased more than 3% year over year, led by a 3.5% increase in food away from home. Energy prices, including gasoline, rose more than 20%, while shelter costs increased 3.3%. Insurance costs, however, declined more than 6% following an increase throughout 2025.

### Spending Behaviors: 2025

Over the past six months, consumers are spending more on essential items like food, gas, and housing, but less on nonessentials like dining out, clothing, and entertainment.

#### SPENDING COMPARED TO 6 MONTHS AGO



Source: Consumer Beef Tracker, January–December 2025. Q2: Thinking about the last 6 months, for each of the following activities, how has your spending changed?  
 Analysis: National Cattlemen’s Beef Association, a contractor to the Beef Checkoff.

## Marketplace Overview

Fresh meat retail performance remained value-led across the measurement period, with dollar sales growth outpacing volume performance. Beef was the primary driver of category value, generating \$46.8 billion in 52-week sales, up 9.8% versus year ago, and \$11.7 billion over the latest 13 weeks, up 6.5%. However, volume growth was comparatively softer, with beef pounds up 2.2% over 52 weeks, essentially flat over 13 weeks at +0.2%, and down 3.2% in the latest 4 weeks. This suggests that beef's dollar growth is being supported more by elevated pricing than incremental volume gains. Within beef, fresh ground beef was the strongest value contributor, up 13.7% over 52 weeks and 10.4% over the latest 4 weeks, while steak performance softened, declining 4.9% in dollar sales and 9.0% in volume during the latest 4 weeks. Overall, beef continues to outperform total fresh meat in dollar growth, but recent volume pressure points to consumers remaining engaged while managing higher price points.

Among non-beef proteins, performance was mixed across the measurement period, with value growth generally stronger than volume growth. Chicken remained the largest non-beef protein and delivered steady value growth, up 5.2% over 52 weeks, 2.6% over 13 weeks, and 0.3% over the latest 4 weeks, while volume also remained positive but moderated from 3.2% over 52 weeks to 0.5% over the latest 4 weeks. Turkey showed the strongest recent dollar momentum among the other proteins, with value sales up 5.2% over 52 weeks, 7.2% over 13 weeks, and 9.2% over 4 weeks; however, volume declined across all periods, indicating growth was price-led rather than demand-led. Pork was softer, with modest 52-week value growth of 2.3%, essentially flat 13-week growth of 0.1%, and a 1.9% decline over the latest 4 weeks, while volume weakened from slight growth over 52 weeks to declines of 2.0% over 13 weeks and 3.5% over 4 weeks. Meat alternatives continued to contract, with both value and volume down across every period, including 4-week declines of 10.6% in dollars and 12.2% in volume.

### 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>	\$81,725,629,735	7.4%	\$20,311,054,146	4.6%	\$6,353,951,719	1.9%
<b>BEEF</b>	\$46,765,810,210	9.8%	\$11,735,479,081	6.5%	\$3,671,517,602	3.0%
BEEF STEAKS	\$15,961,589,918	3.9%	\$4,187,990,169	-0.6%	\$1,364,259,119	-4.9%
BEEF FRESH GROUND	\$17,381,501,066	13.7%	\$4,420,362,206	11.5%	\$1,419,031,314	10.4%
BEEF ROAST	\$4,820,114,033	9.5%	\$999,938,383	5.1%	\$261,788,090	2.6%
BEEF VALUE ADD	\$4,343,053,303	9.5%	\$1,057,237,916	6.5%	\$302,693,936	0.8%
BEEF BRISKET	\$696,831,412	11.5%	\$182,208,682	12.4%	\$61,505,300	10.2%
<b>CHICKEN</b>	\$21,035,330,840	5.2%	\$5,249,244,025	2.6%	\$1,631,424,275	0.3%
<b>TURKEY</b>	\$3,439,301,218	5.2%	\$686,179,066	7.2%	\$204,385,216	9.2%
<b>PORK</b>	\$8,787,164,371	2.3%	\$2,182,086,876	0.1%	\$720,110,306	-1.9%
<b>MEAT ALTERNATIVES</b>	\$246,721,301	-8.8%	\$59,368,635	-9.5%	\$19,487,698	-10.6%

Source: Circana Multi-Market retail performance, period ending 6/14/2026

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>	17,278,488,390	2.0%	4,116,628,836	0.2%	1,292,123,260	-1.7%
<b>BEEF</b>	6,322,198,385	2.2%	1,548,150,133	0.2%	479,783,139	-3.2%
BEEF STEAKS	1,416,072,336	-3.0%	367,104,834	-5.5%	119,917,620	-9.0%
BEEF FRESH GROUND	2,913,841,199	1.9%	717,621,053	0.0%	228,902,865	-2.1%
BEEF ROAST	706,201,886	4.5%	147,762,103	1.1%	39,401,216	-2.0%
BEEF VALUE ADD	653,832,711	6.2%	157,250,473	4.8%	42,406,812	-2.6%
BEEF BRISKET	144,329,564	0.4%	36,678,015	5.4%	12,399,117	2.9%
<b>CHICKEN</b>	6,784,311,924	3.2%	1,691,809,122	2.0%	531,036,905	0.5%
<b>TURKEY</b>	1,239,900,330	-1.4%	147,136,895	-6.2%	41,970,678	-0.6%
<b>PORK</b>	2,707,419,984	0.3%	670,739,302	-2.0%	222,887,153	-3.5%
<b>MEAT ALTERNATIVES</b>	28,105,022	-8.6%	6,696,068	-10.2%	2,242,745	-12.2%

Source: Circana Multi-Market retail performance, period ending 6/14/2026

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>	\$4.73	5.3%	\$4.93	4.4%	\$4.92	3.6%
<b>BEEF</b>	\$7.40	7.4%	\$7.58	6.2%	\$7.65	6.4%
BEEF STEAKS	\$11.27	7.2%	\$11.41	5.2%	\$11.38	4.5%
BEEF FRESH GROUND	\$5.97	11.6%	\$6.16	11.5%	\$6.20	12.8%
BEEF ROAST	\$6.83	4.8%	\$6.77	4.0%	\$6.64	4.7%
BEEF VALUE ADD	\$6.64	3.1%	\$6.72	1.6%	\$7.14	3.4%
BEEF BRISKET	\$4.83	11.1%	\$4.97	6.6%	\$4.96	7.0%
<b>CHICKEN</b>	\$3.10	2.0%	\$3.10	0.6%	\$3.07	-0.2%
<b>TURKEY</b>	\$2.77	6.7%	\$4.66	14.2%	\$4.87	9.8%
<b>PORK</b>	\$3.25	2.0%	\$3.25	2.1%	\$3.23	1.7%
<b>MEAT ALTERNATIVES</b>	\$8.78	-0.3%	\$8.87	0.8%	\$8.69	1.9%

Source: Circana Multi-Market retail performance, period ending 6/14/2026

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

While beef volume is slowing compared to year-ago, volume remains up, compared to three and four year-ago totals.

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