

Beef Marketplace Update – Four Weeks Ending 7/12/2026

Retail snapshot ending July 12th, 2026 from the National Cattlemen’s Beef Association, a contractor to the Beef Checkoff, highlights Father’s Day and celebrating America’s 250th Anniversary and summer grilling.

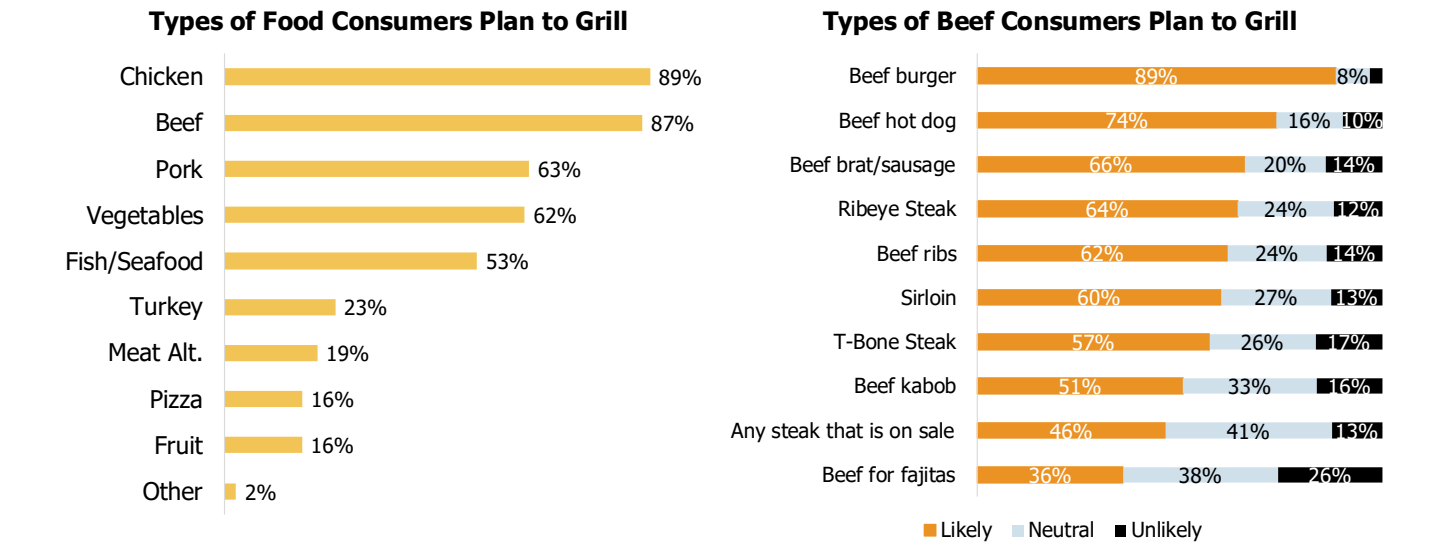
America’s Grilling!

Summer grilling continues to be a resilient demand driver for beef. Consumer research shows grilling remains a favorite eating occasion, with burgers viewed as a must-have by nearly three-quarters of consumers and steak by close to 60%, reinforcing beef’s role as both an everyday cookout staple and a premium celebration protein. In the latest four-week retail read, beef steak volume rebounded to +5.2% versus year ago, outpacing total fresh meat volume growth (+0.6%) and signaling that shoppers returned to steak for summer meals despite elevated prices.

The rebound is notable because it occurred alongside continued pressure in other proteins. Chicken volume was essentially flat at -0.1% in the latest four weeks, while pork grew +1.0% and turkey grew +0.5%. Beef steaks’ +5.2% performance stands out as one of the strongest fresh-meat volume gains in the period, even with a four-week average price of \$11.36 per pound, up 2.4% versus year ago.

Summer grilling foods

Chicken and beef are the top foods consumers plan to grill over the summer. Considering beef specifically, burgers and hot dogs are most popular.



Source: Summer Grilling Survey, 2023. PureSpectrum. N=1,066. Which of the following types of food do you plan to cook on the grill, barbeque, or smoker this summer?
Survey designed and analyzed by National Cattlemen’s Beef Association, a contractor to the Beef Checkoff.

Celebrating America's 250th Anniversary

America's 250th anniversary elevated July 4th into a larger national food occasion¹, creating a stronger platform for grilling, patriotic promotions and celebration-focused meals. Retailers and food brands leaned into the milestone with value offers, limited-time products, patriotic packaging and grilling campaigns, while consumers continued to prioritize familiar foods that feel celebratory but can still be managed within household budgets.



For beef, the 250th created a timely opportunity to position steaks and burgers as center-of-plate anchors for gatherings. Ground beef remained important for affordability and crowd appeal, but the four-week steak rebound suggests that shoppers also made room for higher-value cuts when the occasion warranted it—especially around the July 4th celebrations.

Marketplace Overview

The latest four-week Circana retail data shows fresh meat dollars up +4.8% versus year ago on modest volume growth of +0.6%, indicating that pricing remains a key contributor to category growth. Beef led dollar growth among major proteins at +8.4% and posted positive volume growth of +1.3%, supported by a meaningful rebound in beef steaks. Steak dollars rose +7.7% and volume increased +5.2%, reversing the previous 4-week declines and outperforming chicken, turkey, pork and meat alternatives on volume momentum.

¹ Source: Circana May Total Shopper Survey Results data ending 5/12/2026

Compared with other proteins, beef's four-week performance suggests consumers are still willing to trade up for steak during high-value seasonal occasions. Chicken dollars declined -0.8% and volume was nearly flat at -0.1%, pork delivered modest growth at +0.6% dollars and +1.0% volume, and turkey increased +7.9% dollars on +0.5% volume, reflecting price-driven gains. Meat alternatives remained under pressure, declining -7.6% in dollars and -8.1% in volume.

Key implication: summer grilling and the America 250th milestone helped create a favorable demand backdrop for beef, with steaks showing renewed volume strength even at a premium price point. The data supports messaging that emphasizes beef's unique role in both everyday grilling and special-occasion meals, while also reinforcing value through meal solutions, promotions and convenience and versatility recipe ideas.

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	\$82,102,214,011	7.1%	\$20,733,863,033	4.2%	\$6,549,774,863	4.8%
BEEF	\$47,119,777,037	9.7%	\$12,051,509,119	6.2%	\$3,867,608,758	8.4%
BEEF STEAKS	\$16,091,035,752	4.0%	\$4,511,429,468	1.7%	\$1,503,533,437	7.7%
BEEF FRESH GROUND	\$17,511,958,238	13.3%	\$4,577,056,837	11.5%	\$1,440,791,545	8.8%
BEEF ROAST	\$4,835,474,383	8.9%	\$872,904,167	-3.2%	\$255,752,799	5.0%
BEEF VALUE ADD	\$4,351,304,245	8.9%	\$1,001,608,866	4.1%	\$305,810,480	0.8%
BEEF BRISKET	\$707,669,268	13.5%	\$198,196,719	6.3%	\$77,419,870	11.9%
CHICKEN	\$21,035,954,147	4.6%	\$5,302,834,639	2.0%	\$1,618,347,352	-0.8%
TURKEY	\$3,450,874,322	5.2%	\$658,853,676	5.9%	\$196,798,897	7.9%
PORK	\$8,800,388,360	2.3%	\$2,303,822,751	0.7%	\$740,107,707	0.6%
MEAT ALTERNATIVES	\$244,023,559	-8.8%	\$62,016,467	-10.1%	\$20,644,574	-7.6%

Source: Circana Multi-Market retail performance, period ending 7/12/2026

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	17,298,587,847	1.8%	4,182,671,403	0.1%	1,312,194,088	0.6%
BEEF	6,335,402,349	2.1%	1,569,072,291	-0.3%	500,060,003	1.3%
BEEF STEAKS	1,424,467,125	-2.4%	395,675,646	-2.4%	132,384,014	5.2%
BEEF FRESH GROUND	2,910,159,296	1.3%	738,150,020	-0.4%	232,530,636	-2.4%
BEEF ROAST	708,520,912	4.0%	132,659,799	-3.4%	39,090,339	4.7%
BEEF VALUE ADD	653,534,891	5.7%	140,698,639	1.1%	41,989,238	-2.5%
BEEF BRISKET	144,354,148	3.3%	39,456,940	-5.6%	15,678,941	-3.2%
CHICKEN	6,787,258,450	3.0%	1,713,710,738	2.0%	524,337,644	-0.1%
TURKEY	1,239,778,043	-1.4%	136,261,377	-6.7%	40,725,429	0.5%
PORK	2,712,614,222	0.2%	709,857,272	-0.7%	230,505,012	1.0%

MEAT ALTERNATIVES	27,416,703	-9.3%	7,015,196	-11.9%	2,397,307	-8.1%
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Source: Circana Multi-Market retail performance, period ending 7/12/2026

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	\$4.75	5.2%	\$4.96	4.0%	\$4.99	4.2%
BEEF	\$7.44	7.4%	\$7.68	6.5%	\$7.73	7.0%
BEEF STEAKS	\$11.30	6.6%	\$11.40	4.2%	\$11.36	2.4%
BEEF FRESH GROUND	\$6.02	11.9%	\$6.20	12.0%	\$6.20	11.5%
BEEF ROAST	\$6.82	4.7%	\$6.58	0.2%	\$6.54	0.3%
BEEF VALUE ADD	\$6.66	3.0%	\$7.12	3.0%	\$7.28	3.4%
BEEF BRISKET	\$4.90	10.0%	\$5.02	12.6%	\$4.94	15.6%
CHICKEN	\$3.10	1.6%	\$3.09	0.1%	\$3.09	-0.7%
TURKEY	\$2.78	6.7%	\$4.84	13.6%	\$4.83	7.3%
PORK	\$3.24	2.0%	\$3.25	1.5%	\$3.21	-0.4%
MEAT ALTERNATIVES	\$8.90	0.5%	\$8.84	2.1%	\$8.61	0.5%

Source: Circana Multi-Market retail performance, period ending 7/12/2026

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

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