Beef Marketplace Update – Four Weeks Ending 8/9/2026

Retail snapshot ending August 9th, 2026 from the National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

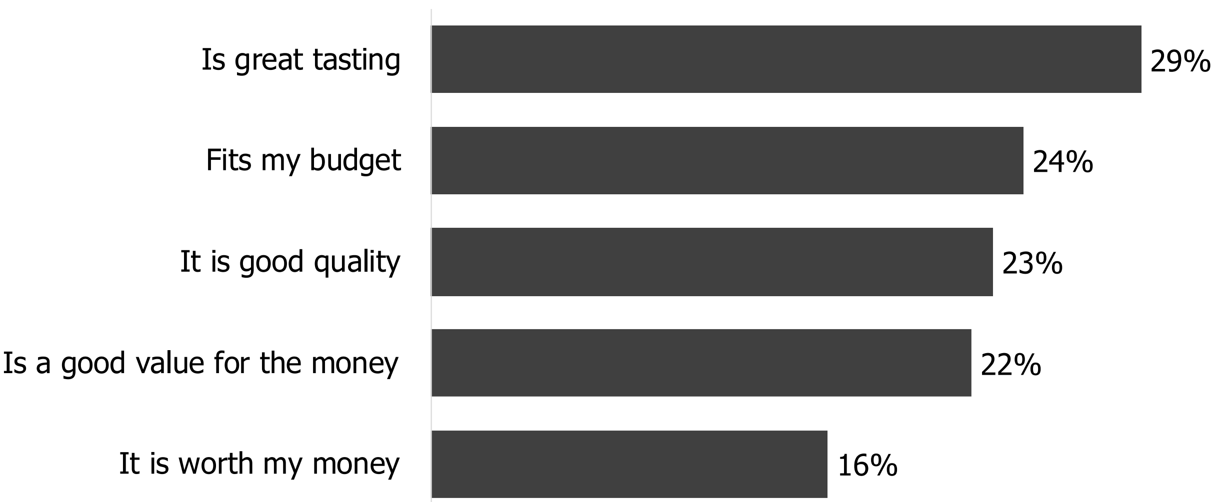
As Americans Face Economic Headwinds, Taste is the Top Protein Driver

When choosing a meal with protein, the top considerations are **taste and value**. Taste is often the first filter: people want a meal that is satisfying, familiar, and enjoyable enough to make it worth choosing again. Value is also critical, especially when shoppers are balancing higher food costs; protein choices need to feel worth the price, whether through portion size, versatility, convenience, or overall meal satisfaction.

Beyond taste and value, **nutrition, convenience, and familiarity** help close the decision. Consumers want protein options that support their health goals, are easy to prepare, and fit into meals they already know will work for their household. Together, these five drivers point to a practical decision-making process: people want protein that tastes good, feels affordable, supports their needs, and makes mealtimes easier and more reliable.

Top 3 considerations when choosing a meal with protein (5 highest ranked)

When focusing on top 3 priority for meals with protein, taste, budget, and quality remain most important.



Source: Consumer Beef Tracker January– June 2026. Q10: "Now we would like you to choose the top 3 factors that you most considewhen deciding to have a meal with beef, chicken, pork, fish/seafood, meat alternatives or some other source of protein. Remember, you may only choose 3 attributes"
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

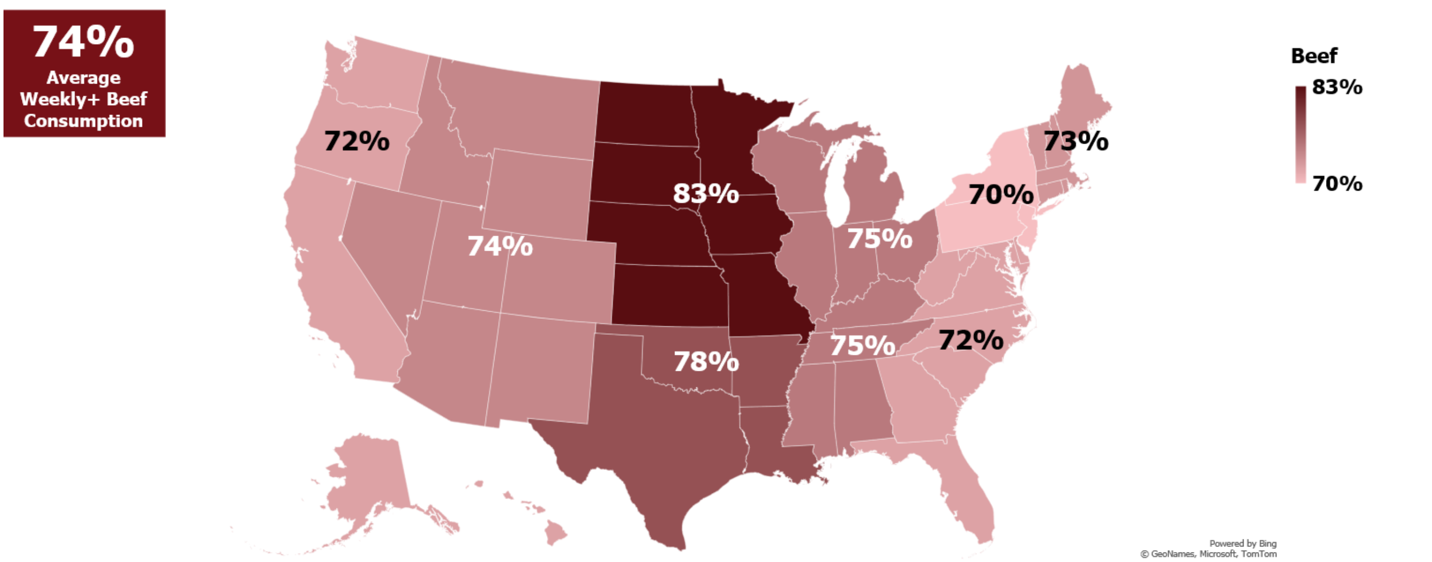
Regional Drivers of Weekly Beef Consumption

Regional weekly beef consumption is relatively steady, with beef maintaining a strong role in weekly meal routines across regions. The regional pattern suggests that beef remains a consistent, mainstream protein choice, though consumption levels likely vary by local preferences, household habits, and market conditions. Higher-consumption regions may reflect stronger beef traditions and greater reliance on familiar beef meals, while lower-consumption regions may be influenced by broader protein variety, price sensitivity, or meal occasions.

The key takeaway is that weekly beef consumption remains broadly established across the country. Regional differences suggest optimizing messaging by market: in stronger beef regions, the opportunity is to reinforce loyalty and meal frequency, while in lower-consumption regions, the focus may be on convenience, nutrition, value, and versatile meal solutions that make beef feel easier to incorporate more often.

Regional Weekly+ Consumption of Beef

Weekly+ consumption of beef is highest in the center of the country, comparatively lower along both coasts.



Source: Consumer Beef Tracker, January 2026 – June 2026. Q1_Combined "Thinking about all of your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of food?"
**Change to question format in April 2026 **Pacific (WA, OR, CA, AK, HI) West South Central (TX, OK, AR, LA), New England (ME, NH, VT, MA, RI, CT) Mountain (MT, ID, WY, NV, UT, CO, AZ, NM) East South Central (KY, TN, MS, AL) Middle Atlantic (NY, NJ, PA) West North Central (ND, SD, NE, KS, MN, IA, MO) East North Central (WI, IL, MI, IN, OH) South Atlantic (FL, GA, SC, NC, VA, WV, DC, MD, DE)*

Marketplace Overview

Beef's retail performance underscores why it remains well positioned against the leading drivers of protein choice: taste, value, nutrition, convenience, and familiarity. In the latest four-week period, beef generated roughly $3.5 billion in fresh meat dollar sales, up 4.2% versus year ago, while also posting positive volume growth of 1.9%. That combination suggests beef is not only benefiting from price gains, but also continuing to move pounds at retail—a strong signal that shoppers are still choosing beef even as they face economic pressure.

The strength is especially notable because beef is competing in an environment where consumers are focused on getting meals that deliver satisfaction and value. Beef's core advantages—flavor, meal versatility, eating experience, and trusted nutrition—align directly with the top protein decision drivers. Ground beef, in particular, reinforces this story with strong dollar growth and positive volume performance, making it a practical, familiar option for households looking for meals that are satisfying, flexible, and worth the spend.

Overall, the retail data points to resilient demand: beef continues to command the largest share of fresh meat dollar sales and is growing in both dollars and pounds over the latest four weeks. Beef's strong retail performance reflects enduring consumer confidence in the product, supported by the same attributes shoppers say matter most when choosing protein.

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	$82,226,939,953	6.6%	$20,573,673,242	3.3%	$6,076,886,049	1.8%
BEEF	$47,277,657,848	9.1%	$11,978,899,405	5.7%	$3,516,103,914	4.2%
BEEF STEAKS	$16,095,334,875	3.2%	$4,496,989,957	1.4%	$1,285,138,966	0.1%
BEEF FRESH GROUND	$17,601,548,714	12.9%	$4,552,550,956	9.1%	$1,345,610,231	6.5%
BEEF ROAST	$4,851,665,174	8.5%	$857,776,082	5.3%	$273,087,613	6.6%
BEEF VALUE ADD	$4,356,742,168	8.1%	$988,681,280	1.1%	$299,051,485	0.0%
BEEF BRISKET	$707,331,026	12.5%	$198,419,444	8.4%	$45,512,449	-1.7%
CHICKEN	$21,016,362,292	3.9%	$5,264,375,023	-0.1%	**$1,599,606,180**	**-1.3%**
TURKEY	$3,466,721,073	5.4%	$653,012,326	8.0%	**$204,068,631**	**8.3%**
PORK	$8,772,748,467	1.8%	$2,271,412,098	-1.3%	**$637,192,097**	**-4.3%**
MEAT ALTERNATIVES	$241,591,339	-8.7%	$62,468,889	-10.2%	$17,945,936	-11.9%

Source: Circana Multi-Market retail performance, period ending 8/9/2026
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	17,300,620,883	1.6%	4,155,639,214	-0.2%	1,233,579,301	-0.1%
BEEF	6,346,005,468	2.0%	1,559,437,956	0.3%	460,112,876	1.9%
BEEF STEAKS	1,423,619,415	-2.7%	395,265,433	-1.5%	112,810,289	-1.1%
BEEF FRESH GROUND	2,914,439,747	1.4%	735,554,127	-0.7%	218,586,658	1.6%
BEEF ROAST	711,308,324	3.8%	130,410,151	3.4%	41,802,656	7.2%
BEEF VALUE ADD	653,959,543	5.2%	137,513,469	-1.6%	41,869,158	-0.7%
BEEF BRISKET	143,367,671	2.6%	39,042,752	-2.8%	8,298,184	-11.0%
CHICKEN	6,785,840,262	2.5%	1,708,953,747	0.4%	**520,840,478**	**-0.4%**
TURKEY	1,240,713,810	-1.2%	135,068,601	0.2%	**42,411,753**	**2.4%**
PORK	2,705,114,708	-0.1%	699,594,756	-2.1%	**194,795,451**	**-3.9%**
MEAT ALTERNATIVES	27,004,683	-9.7%	7,055,375	-12.8%	1,944,512	-17.5%

Source: Circana Multi-Market retail performance, period ending 8/9/2026
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	4.9%	$4.95	3.4%	$4.93	1.8%
BEEF	$7.45	6.9%	$7.68	5.4%	$7.64	2.2%
BEEF STEAKS	$11.31	6.0%	$11.38	2.8%	$11.39	1.2%
BEEF FRESH GROUND	$6.04	11.3%	$6.19	9.9%	$6.16	4.8%
BEEF ROAST	$6.82	4.5%	$6.58	1.8%	$6.53	-0.5%
BEEF VALUE ADD	$6.66	2.8%	$7.19	2.8%	$7.14	0.7%
BEEF BRISKET	$4.93	9.6%	$5.08	11.5%	$5.48	10.4%
CHICKEN	$3.10	1.4%	$3.08	-0.5%	**$3.07**	**-0.9%**
TURKEY	$2.79	6.7%	$4.83	7.8%	**$4.81**	**5.8%**
PORK	$3.24	1.9%	$3.25	0.7%	**$3.27**	**-0.5%**
MEAT ALTERNATIVES	$8.95	1.1%	$8.85	2.9%	$9.23	6.7%

Source: Circana Multi-Market retail performance, period ending 8/9/2026
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

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BEEF RESEARCH

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