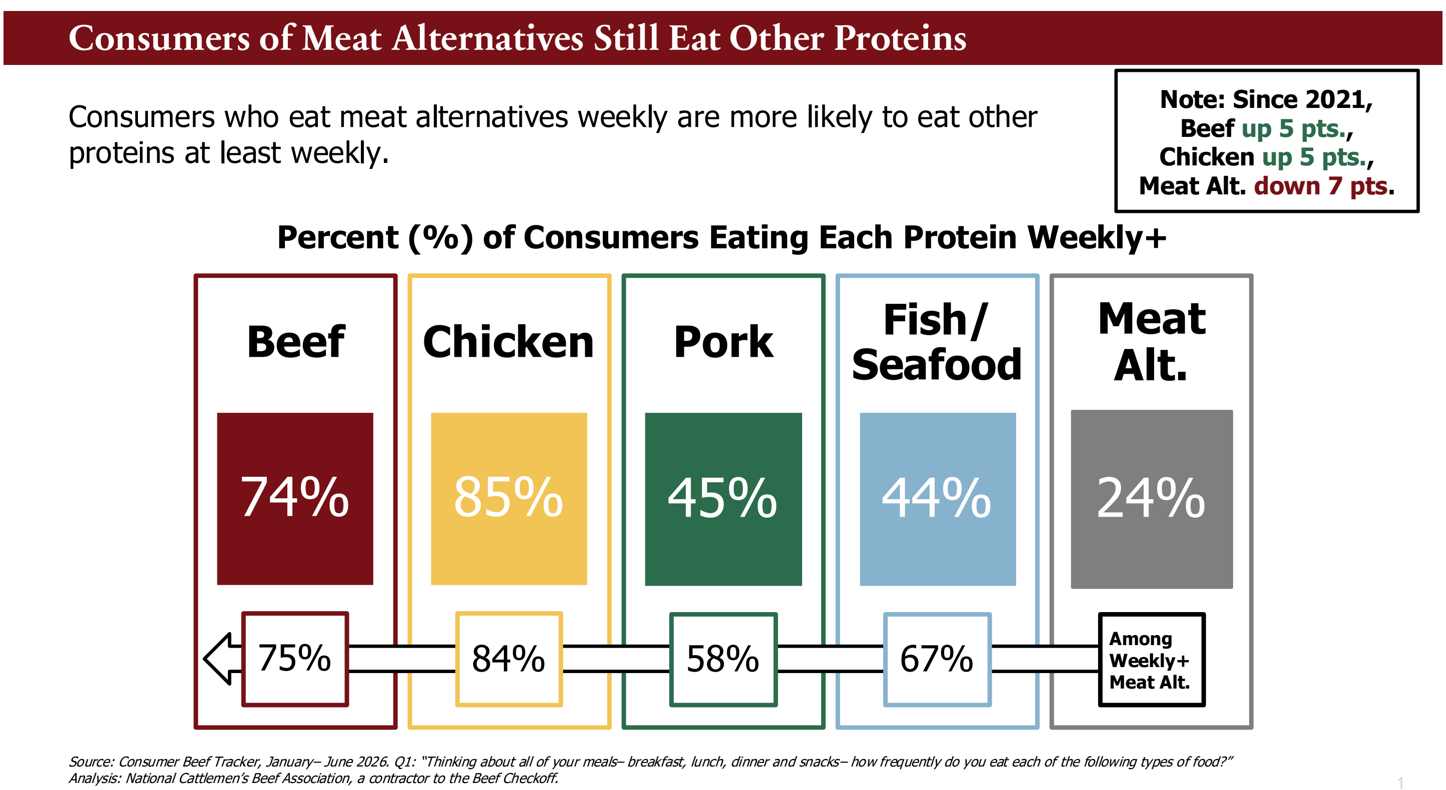
Fresh and Frozen Protein – 52 Weeks Ending 6/14/2026

Fresh and frozen retail snapshot ending June 14th, 2026 from the National Cattlemen's Beef Association, a contractor to the Beef Checkoff, highlights fresh and frozen beef continuing to see record retail sales for the measurement period.

Weekly Consumption (add record levels of weekly beef consumption)

Among all consumers, beef and chicken remain the top proteins eaten at least weekly followed by pork and fish/seafood. Interestingly, of those consumers eating meat alternatives at least weekly, both beef and chicken remain the top protein choice, showing that consumers continue to rely heavily on traditional animal proteins. Rather than fully replacing meat, meat alternatives appear to be part of a broader protein mix, with consumers still regularly choosing familiar, versatile options like beef and chicken for meals.

As both beef and chicken are showing record level weekly consumption, meat alternatives are showing declines, indicating some softening compared with other protein categories. Overall, the slide reinforces that consumers of meat alternatives are not abandoning animal protein; instead, beef, chicken, pork and seafood remain central to their diets, while meat alternatives appear to be losing some ground.



Fresh & Frozen Protein Consumption

Fresh and frozen protein consumption remained strong over the past year as shoppers continued to prioritize animal protein while managing elevated food costs. Fresh meat performance was largely value-led, with dollar sales growth outpacing volume gains across the measurement period. Beef continued to be the primary driver of fresh meat value, generating $46.8 billion in 52-week retail sales, up 9.8% versus year ago, while pounds increased 2.2%. Chicken also delivered steady growth, with dollar sales up 5.2% and pounds up 3.2% over the same period, underscoring consumers' continued reliance on familiar, versatile proteins for at-home meals.

Frozen protein consumption benefited from the same macro forces shaping fresh: consumers sought convenient, affordable ways to prepare satisfying meals at home. Frozen foods have become more integrated into routine meal planning, with 40% of consumers using frozen foods every few days or daily and 76% combining fresh and frozen ingredients in the same meal[1]. High-protein frozen foods generated approximately $12 billion in annual sales and grew at double-digit volume rates, while restaurant-inspired frozen items also gained traction as consumers recreated takeout-style occasions at home[2].

Overall, protein demand appears durable as consumers continue to balance health, taste and value. Fresh proteins remain core to household meal routines, while frozen proteins are increasingly viewed as complementary rather than substitutive—helping shoppers stretch budgets, reduce waste and simplify meal preparation. The strongest opportunities are likely to remain in familiar, versatile formats such as ground meats, chicken-based solutions, multi-serve frozen meals and protein-forward items that deliver both value and convenience.

[1] Source: 2026 Power of Frozen in Retail, American Frozen Food Institute & FMI
[2] Source: 2026 Conagra Brands' Future of Frozen Food

Fresh & Frozen Meat & Seafood: 52 Weeks Ending 6/14/2026 Versus Year Ago

Beef sales are up across key metrics—value (pounds x price/pound) as well as pounds sold.

Total Fresh/Frozen Meat & Seafood Sales Growth in Dollars

+6.4%

(~$105.7 Billion)

Lbs. Sales Growth

+1.5%

(~20.8 Billion lbs.)

Source: Circana, Fresh Beef Sales by Volume and Value, Data Ending 6/14/2026.
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

% of $ Sales Fresh	$52 wks Ending 6/14 v. YAGO	LBS. 52 wks Ending 6/14 v. YAGO
93%	+ 10.0% $50.2B v. $45.7B	+2.3% 6.98B v. 6.83B lbs.
92%	+4.4% $22.9B v. $21.9B	+3.0% 7.4B v. 7.2B lbs.
51%	+2.6% $17.35B v. $16.9B	-2.7% 1.97B v. 2.03B lbs.
99%	+2.3% $8.88B v. 8.67B	+0.3% 2.73B v. 2.72B lbs.
28%	-8.5% $906M v. $990B	-9.9% 109M v. 121M

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Source: Circana Multi-Market retail performance, period ending 6/14/2026
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

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