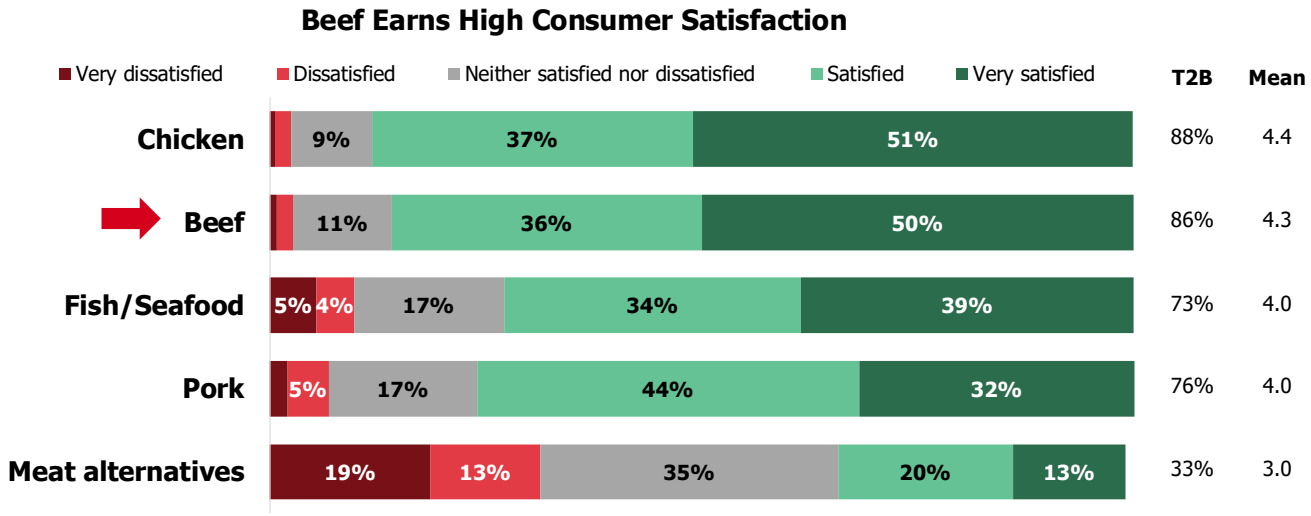
Beef Marketplace Update – Four Weeks Ending 10/4/2026

Retail snapshot ending October 4th, 2026, from the National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Beef Earns High Consumer Satisfaction

Beef earns high consumer satisfaction, with **86% of consumers satisfied or very satisfied** and an average rating of 4.3 out of 5. Half of consumers are very satisfied, and another 36% are satisfied, while only a small share express dissatisfaction. Beef ranks just behind chicken at 88% satisfaction and a 4.4 mean, and it outperforms pork at 76%, fish and seafood at 73%, and meat alternatives at 33%.

For the beef industry, these results reinforce that consumers continue to perceive **strong value in beef despite its premium price**. That positive experience aligns with recent retail performance: during the latest four weeks, beef dollar sales increased 2.7%, and volume rose 1.8%, while chicken and pork dollar sales declined. High satisfaction can support repeat purchases and trade-up opportunities, but the narrow gap with chicken means the industry should continue emphasizing **taste, versatility, nutrition, and dependable eating quality**. Strong growth in ground beef, roasts, and brisket also suggests an opportunity to translate satisfaction into sales by promoting familiar meal solutions across a range of price points.



Source: Consumer Beef Tracker April– June 2026. Q203. Overall, how satisfied are you with each of the following proteins? (Select one per row)
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Marketplace Overview

Beef continues to outperform the broader fresh-meat case. During the latest four weeks ending October 4, 2026, beef generated **$3.51 billion** in retail sales, up 2.7% from a year ago, while volume increased 1.8%. By comparison, total fresh-meat sales rose just 0.8% as volume declined 0.4%. **Beef also gained while chicken and pork sales fell 1.0% and 6.1%**, respectively, underscoring consumers' continued willingness to choose beef. Beef's ability to grow both dollars and pounds at an average price of $7.41 per pound demonstrates resilient consumer demand despite a premium over chicken and pork.

Category performance was mixed, with ground beef and roasts providing the strongest near-term momentum. Ground beef sales increased 4.1% as volume rose 2.7%, while roast sales climbed 9.0% on a 4.9% volume gain. Brisket also performed well, with dollar sales up 8.7% and volume up 6.1%. Steaks remained a major contributor but softened, with sales down 1.3% and volume down 1.9%, while value-added beef declined in both dollars and volume.

Overall, the results indicate some movement toward **versatile, familiar cuts** that deliver perceived value. While beef is outperforming competing proteins on both scale and underlying demand, continued strength in ground beef, roasts, and brisket suggests that maintaining a balanced product mix around affordability, versatility, and everyday meal solutions will be important for sustaining momentum.

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	$82.3B	5.60%	$20.0B	1.40%	$6.1B	0.80%
BEEF	$47.4B	8.00%	$11.5B	3.30%	$3.5B	2.70%
BEEF STEAKS	$16.1B	2.10%	$4.1B	-0.40%	$1.2B	-1.30%
BEEF FRESH GROUND	$17.7B	11.60%	$4.4B	5.30%	$1.4B	4.10%
BEEF ROAST	$4.9B	7.90%	$980.0M	5.60%	$355.8M	9.00%
BEEF VALUE ADD	$4.3B	6.10%	$985.6M	-1.20%	$312.2M	-1.40%
BEEF BRISKET	$714.1M	12.90%	$166.5M	3.60%	$54.2M	8.70%
CHICKEN	$21.0B	2.80%	$5.3B	-1.20%	$1.6B	-1.00%
TURKEY	$3.5B	5.80%	$681.6M	6.90%	$217.8M	6.00%
PORK	$8.7B	0.70%	$2.1B	-4.30%	$633.2M	-6.10%
MEAT ALTERNATIVES	$238.2M	-8.00%	$57.9M	-9.70%	$16.9M	-9.80%

Source: Circana Multi-Market retail performance, period ending 10/4/2026
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	17.3B	1.40%	4.1B	0.20%	1.3B	-0.40%
BEEF	6.4B	2.10%	1.5B	1.80%	473.3M	1.80%
BEEF STEAKS	1.4B	-2.40%	361.2M	-1.20%	103.6M	-1.90%
BEEF FRESH GROUND	2.9B	1.70%	724.3M	1.90%	222.3M	2.70%
BEEF ROAST	715.0M	3.50%	152.3M	5.30%	55.7M	4.90%
BEEF VALUE ADD	644.8M	3.90%	138.7M	-2.00%	44.7M	-2.20%
BEEF BRISKET	143.6M	4.00%	31.8M	-3.80%	10.7M	6.10%
CHICKEN	6.8B	2.00%	1.7B	0.00%	531.1M	-0.10%
TURKEY	1.2B	-1.00%	142.5M	-1.40%	46.4M	-4.90%
PORK	2.7B	-0.40%	652.1M	-2.70%	197.8M	-4.70%
MEAT ALTERNATIVES	26.5M	-9.20%	6.3M	-12.80%	1.8M	-13.70%

Source: Circana Multi-Market retail performance, period ending 10/4/2026
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	$4.76	4.10%	$4.88	1.20%	$4.83	1.20%
BEEF	$7.47	5.70%	$7.54	1.50%	$7.41	0.90%
BEEF STEAKS	$11.32	4.60%	$11.33	0.80%	$11.28	0.60%
BEEF FRESH GROUND	$6.06	9.80%	$6.13	3.30%	$6.11	1.40%
BEEF ROAST	$6.83	4.20%	$6.44	0.30%	$6.39	3.90%
BEEF VALUE ADD	$6.70	2.10%	$7.11	0.80%	$6.99	0.70%
BEEF BRISKET	$4.97	8.50%	$5.24	7.80%	$5.05	2.40%
CHICKEN	$3.09	0.70%	$3.07	-1.20%	$3.07	-0.90%
TURKEY	$2.82	6.90%	$4.78	8.40%	$4.69	11.50%
PORK	$3.23	1.10%	$3.24	-1.60%	$3.20	-1.50%
MEAT ALTERNATIVES	$8.98	1.30%	$9.13	3.50%	$9.36	4.50%

Source: Circana Multi-Market retail performance, period ending 10/4/2026
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

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