

## Beef Marketplace Update – November 2025

November 2025 retail snapshot from the National Cattlemen’s Beef Association, a contractor to the Beef Checkoff, highlights beef continuing to see record retail sales and intent to consume beef at the same level or more in the future.

**Beef is leading meat case growth.** Over the last 52 weeks, beef delivered **\$44.6B** in retail sales, up **12.2%**, outpacing other major proteins; beef volume also rose **4.4%**.

### Beef Cuts and Value Add

- **Ground beef is the workhorse.** It shows broad-based momentum: 52-week **dollar sales +13.6%** and **volume +3.2%**, with even stronger gains in the last 4 weeks (**dollars +17.2%**, **volume +3.6%**).
- **Steaks are premium—and price sensitive.** Dollar sales are up, but short-term **volume dipped** (-2.2% over 13 weeks; -0.9% over 4 weeks) as **price per lb.** climbed to **\$11.06** (+7.5% 52-week; +8.7% 13-week).
- **Value-added beef is expanding.** Ready-to-cook/seasoned items grew in **dollars (+9.8% 52-week)** and **volume (+7.4% 52-week)**, signaling demand for convenience.

### Tis the Season

- **Seasonal opportunity: Brisket** shows a recent surge (**+18.7% dollars; +7.0% volume in the last 4 weeks**), aligning with holiday/entertaining.

### Price Increases Across the Majority of the Protein Aisle

- **Average price per lb.:** **Beef \$7.18** (+7.5% 52-week) vs **Chicken \$3.17** (+3.3% 52-week), **Pork \$3.27** (+2.1% 52-week), **Turkey \$2.62** (+0.3% 52-week); **ground beef** rose fastest (**\$5.65**, +10.1% 52-week; **\$5.99**, +12.4% 13-week; **\$5.96**, +13.2% 4-week).
- **Alternative meats continue to soften.** Meat alternatives declined in **dollars (-12.8%)** and **volume (-11.5%)**, while remaining a relatively **premium price point (~\$8+/lb)**.

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>	78,996,200,065	8.9%	20,241,139,280	8.3%	6,446,280,787	7.9%
<b>BEEF</b>	44,621,372,539	12.2%	11,157,506,953	11.3%	3,385,581,788	12.4%
BEEF STEAKS	15,594,015,194	11.3%	3,649,635,606	6.3%	1,049,929,329	5.7%
BEEF FRESH GROUND	16,353,723,829	13.6%	4,285,468,251	15.0%	1,259,122,516	17.2%
BEEF ROAST	4,570,631,661	10.4%	1,195,327,631	9.2%	431,687,651	11.4%
BEEF BRISKET	648,772,603	5.2%	163,086,533	7.3%	56,245,037	18.7%
BEEF VALUE ADD	4,258,646,387	9.8%	1,068,583,820	11.6%	317,152,946	11.9%
<b>CHICKEN</b>	20,609,465,691	6.5%	5,188,530,405	6.8%	<b>1,482,857,798</b>	<b>5.6%</b>
<b>TURKEY</b>	3,325,308,194	2.6%	1,331,357,121	2.6%	<b>817,851,021</b>	<b>1.1%</b>
<b>PORK</b>	8,749,668,283	3.1%	2,173,625,090	3.8%	<b>635,227,362</b>	<b>3.7%</b>
<b>MEAT ALTERNATIVES</b>	273,517,547	-12.8%	62,723,288	-10.0%	19,764,939	-2.8%

Source: Circana Multi-Market retail performance, period ending 11/30/2025

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>	16,905,460,189	3.1%	4,617,141,250	2.9%	1,749,378,216	4.1%
<b>BEEF</b>	6,216,564,121	4.4%	1,523,293,576	2.8%	461,698,109	4.1%
BEEF STEAKS	1,409,593,270	3.5%	322,126,273	-2.2%	93,244,232	-0.9%
BEEF FRESH GROUND	2,894,674,637	3.2%	714,966,879	2.3%	211,338,095	3.6%
BEEF ROAST	684,618,905	6.5%	182,583,403	5.0%	61,743,103	6.0%
BEEF BRISKET	136,310,081	-8.7%	32,193,508	-7.2%	11,204,492	7.0%
BEEF VALUE ADD	641,473,963	7.4%	158,671,293	10.0%	47,551,015	9.1%
<b>CHICKEN</b>	6,507,817,750	3.1%	1,634,827,919	4.2%	471,658,192	4.5%
<b>TURKEY</b>	1,271,623,410	2.4%	751,702,754	4.4%	606,368,766	5.3%
<b>PORK</b>	2,678,664,242	1.0%	654,463,665	-0.4%	192,267,857	0.7%
<b>MEAT ALTERNATIVES</b>	33,622,852	-11.5%	7,307,107	-13.1%	2,380,204	-1.4%

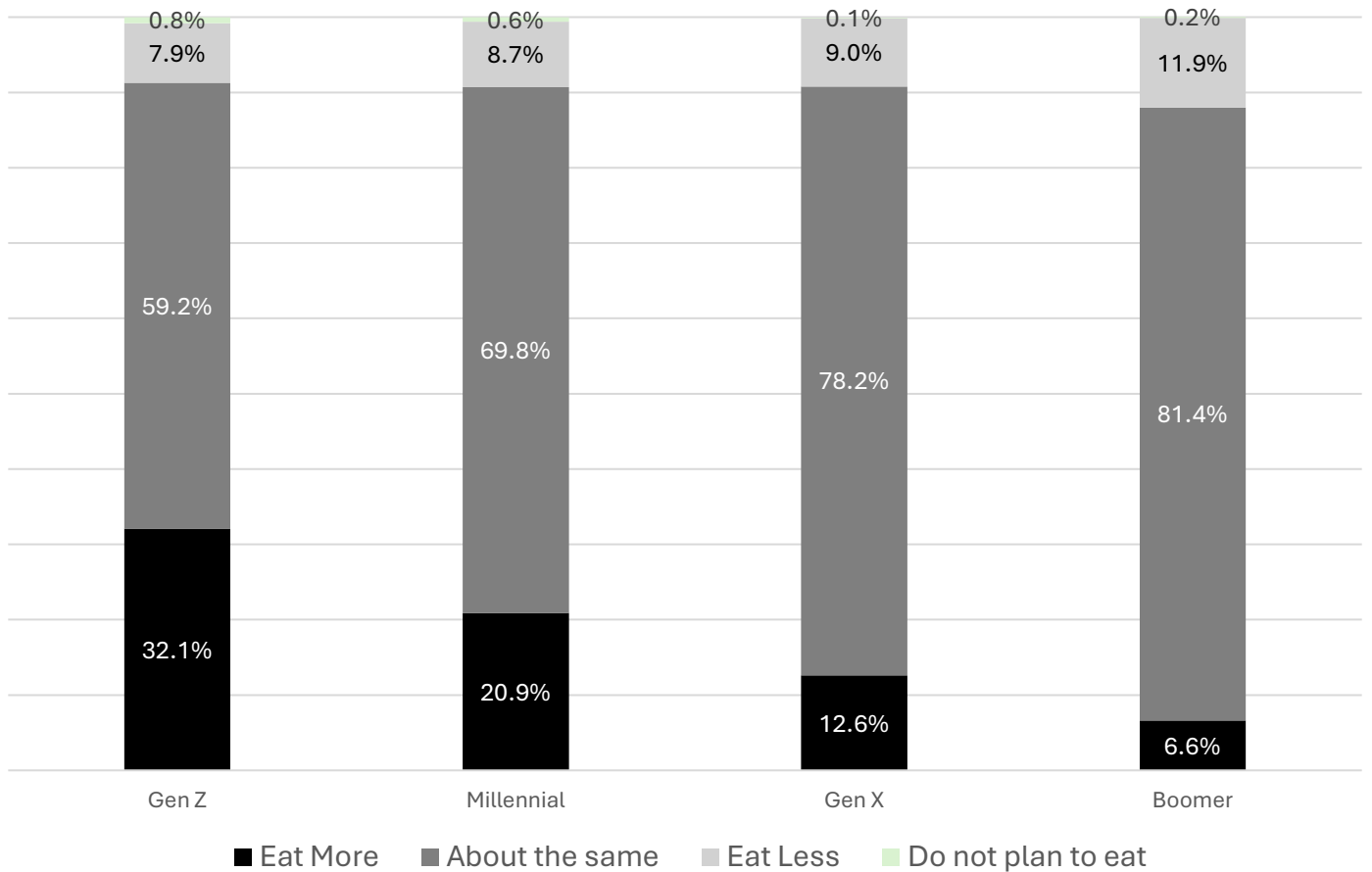
Source: Circana Multi-Market retail performance, period ending 11/30/2025

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>	\$4.67	5.6%	\$4.38	5.2%	\$3.68	3.7%
<b>BEEF</b>	\$7.18	7.5%	\$7.32	8.3%	\$7.33	8.0%
BEEF STEAKS	\$11.06	7.5%	\$11.33	8.7%	\$11.26	6.6%
BEEF FRESH GROUND	\$5.65	10.1%	\$5.99	12.4%	\$5.96	13.2%
BEEF ROAST	\$6.68	3.6%	\$6.55	4.0%	\$6.99	5.1%
BEEF BRISKET	\$4.76	15.2%	\$5.07	15.7%	\$5.02	11.0%
BEEF VALUE ADD	\$6.64	2.2%	\$6.73	1.5%	\$6.67	2.5%
<b>CHICKEN</b>	\$3.17	3.3%	\$3.17	2.5%	\$3.14	1.1%
<b>TURKEY</b>	\$2.62	0.3%	\$1.77	-1.7%	\$1.35	-4.0%
<b>PORK</b>	\$3.27	2.1%	\$3.32	4.2%	\$3.30	3.1%
<b>MEAT ALTERNATIVES</b>	\$8.13	-1.5%	\$8.58	3.7%	\$8.30	-1.4%

Source: Circana Multi-Market retail performance, period ending 11/30/2025

**Consumers plan to keep or increase beef in their diets—especially younger cohorts.** Most plan to eat more or about the same, and **Gen Z** has the highest intent to **eat more (~32%)**; less than 1% of any cohort **do not plan to eat beef in the future.**

Future expectations for beef consumption is robust across all generations among those consuming beef at least once a week



Source: Consumer Beef Tracker January - November 2025. Q1. Thinking about all of your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of food How many times have you consumed each of the following proteins in the past week? (Beef) Q3. Looking forward, do you plan to eat more, less, or about the same amount of each of the following? (Beef);