



DEMAND SCORE & DRIVERS ANALYSIS

2026 UPDATE

Demand Drivers for 2026 Summary *(based on 2025 data)*

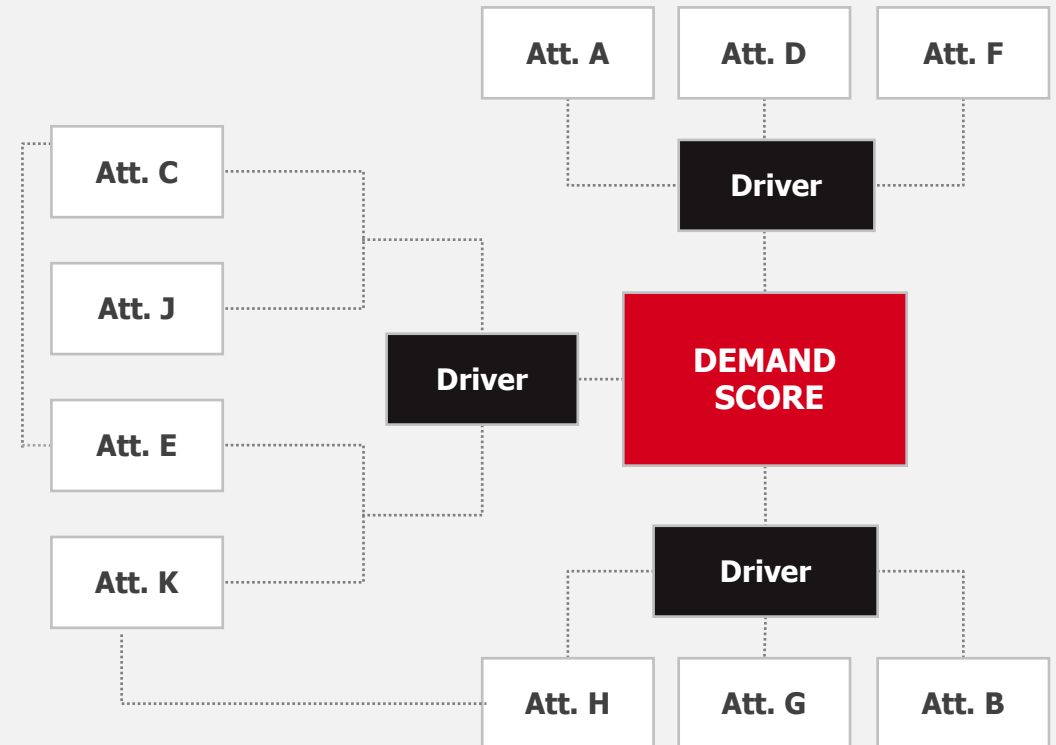
- Beef demand remains stable and well above pork, fish, and meat alternatives, driven primarily by consumers' pleasurable eating experience, versatility across meal types, budget fit, and familiarity with preparation.
- Consumer trust is strongest on beef's nutritional value and safety (both above **72%** top-two-box), but metrics around humane treatment, environmental stewardship, transparency, and responsible antibiotic/hormone use have been declining since **2023**, signaling growing vulnerability.
- In the component driver rankings, beef retains a clear lead over chicken on eating experience, taste, and "gives me strength," but that competitive gap has narrowed sharply in **2025** — particularly on budget perception and meal versatility, where chicken now leads — underscoring that price and convenience are growing drivers.
- Trust drivers in **2025** shifted toward transparency ("industry openly shares information") and safety, suggesting that communication around animal welfare, sustainability, and food safety will be best positioned to protect and grow future demand.

DEMAND SCORE MODELING

There are a number of models for measuring brand health & equity, most of which use a combination of factoring, laddering & regression techniques.

- Decomposing various dimensions through multi-variate regression techniques enables the understanding of what is “driving” these metrics at a more granular level.
- Multi-variate statistical tools are used to determine the importance of drivers and key indicators.

Example Demand Score Framework



DEMAND SCORE MODELING GLOSSARY

DEMAND SCORE INDEX

The Demand Score Index summarizes the overall behavioral intent toward a protein specific to how consumers stated past behavior (frequency and preference) and willingness to pay more for relate to that protein.

This score is a relative index and hence is read relative to the category average.

CONSUMPTION INDEX

The Consumption Index indicates how frequently consumers claim to consume the protein.

This score is a relative index and hence is read relative to the category average.

PREFERENCE INDEX

The Preference Index indicates the consumer preference of the protein compared to other proteins, the willingness to chose a protein over others.

This score is a relative index and hence is read relative to the category average.

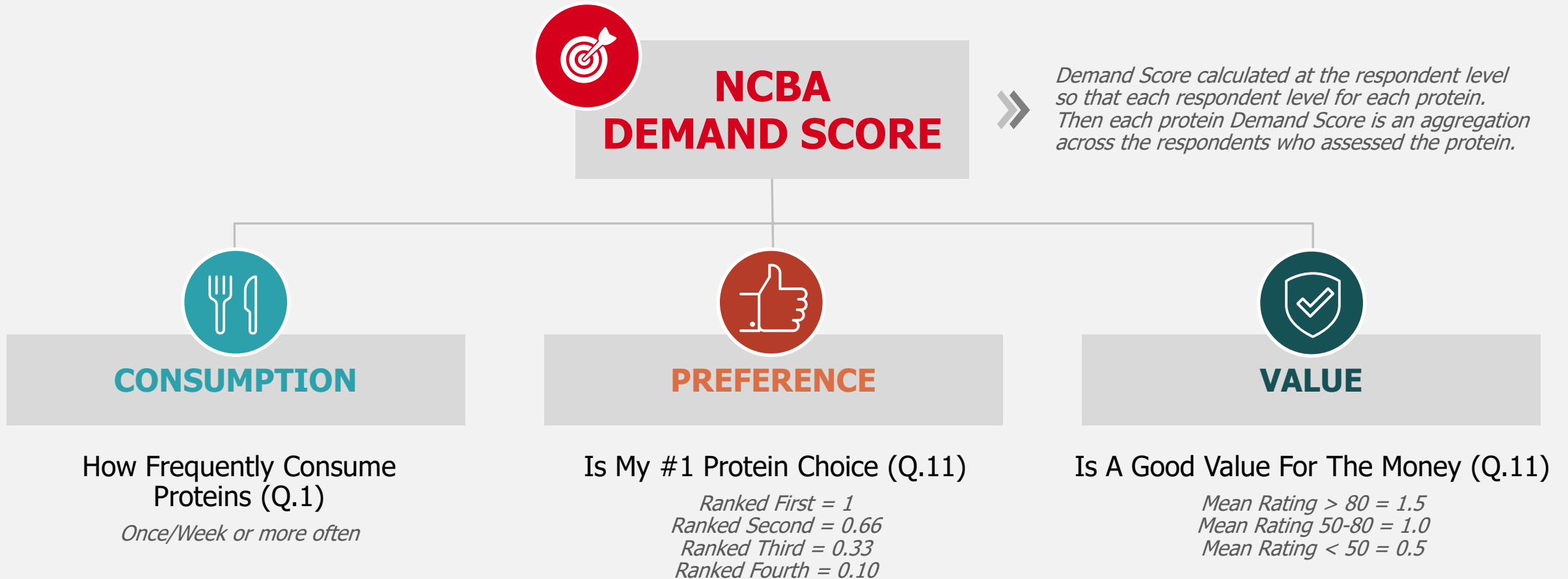
VALUE INDEX

The Value Index indicates the consumers' willingness to pay more for the protein and hence measures the inherent value of the protein relative to how much they are expected to pay for it.

This score is a relative index and hence is read relative to the category average.

NCBA DEMAND SCORE OVERVIEW

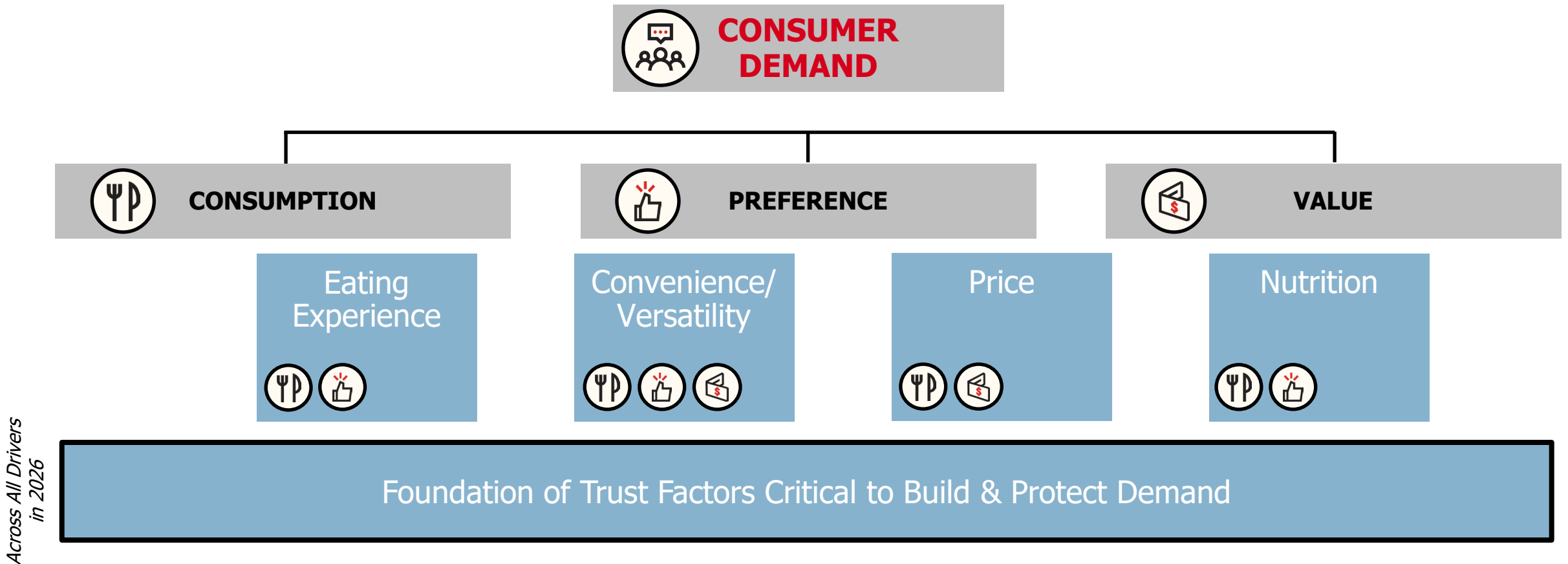
The NCBA Demand Score is comprised of three overarching inputs:



The Demand Score and its components are expressed as an index, where 100 is the average across all proteins evaluated.

Consumer Self-Perceived Demand Drivers – NEW FOR 2026 *(based on 2025 data)*

Little change from 2025 Demand Drivers heading into 2026 as consumers facing economic pressures holding steady across key metrics with value preference no longer a primary nutrition driver.



Foundation of Trust Factors Critical to Build & Protect Demand



Embrace Innovation to Improve Quality, Safety and Animal Well Being



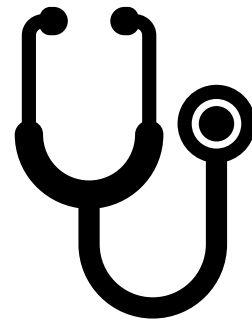
Nutritious, Safe to Eat
No impact on Long-term Health



Safety Continually Monitored & Sanitation Guidelines Followed



Grass Part of Diet & Room to Roam/Health a Priority



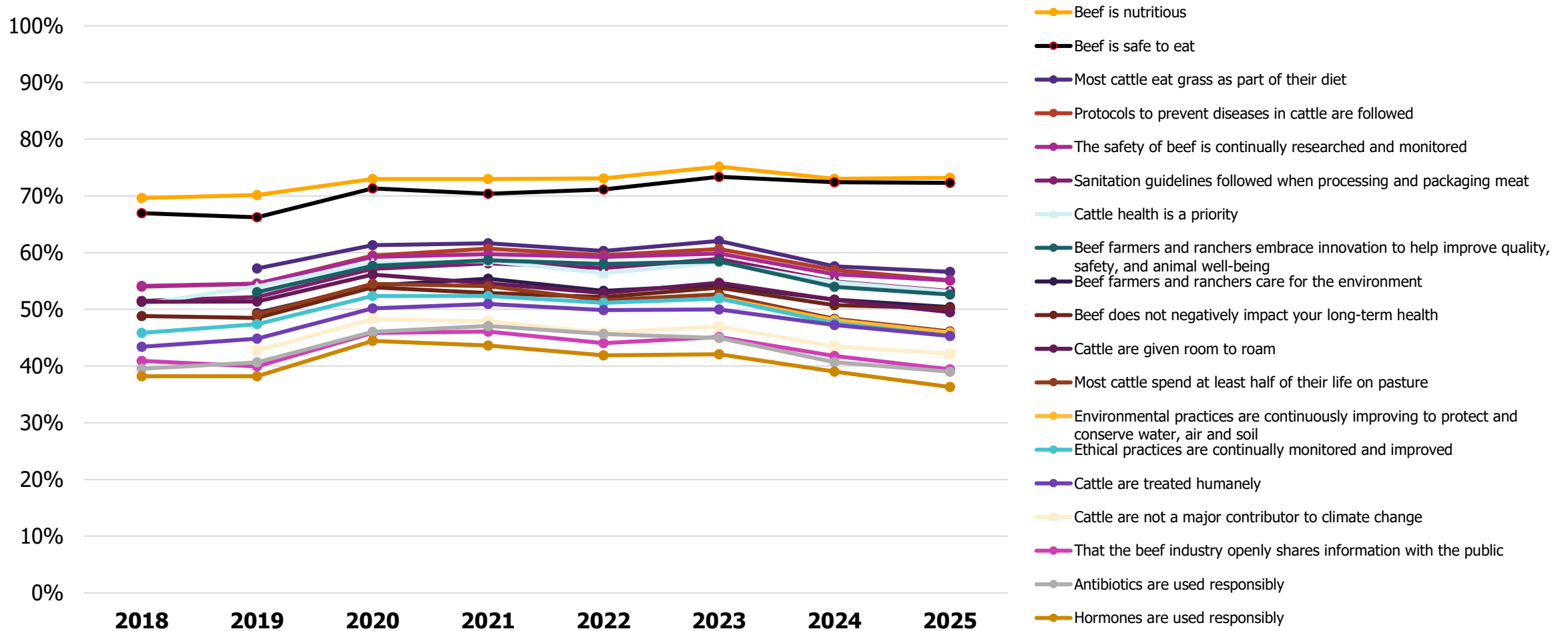
Disease Prevention, Ethical Practices & Treated Humanely



Care for the Environment & Protect/Conserve Water

Consumer Trust Metrics: How Cattle are Raised for Food (T2B)

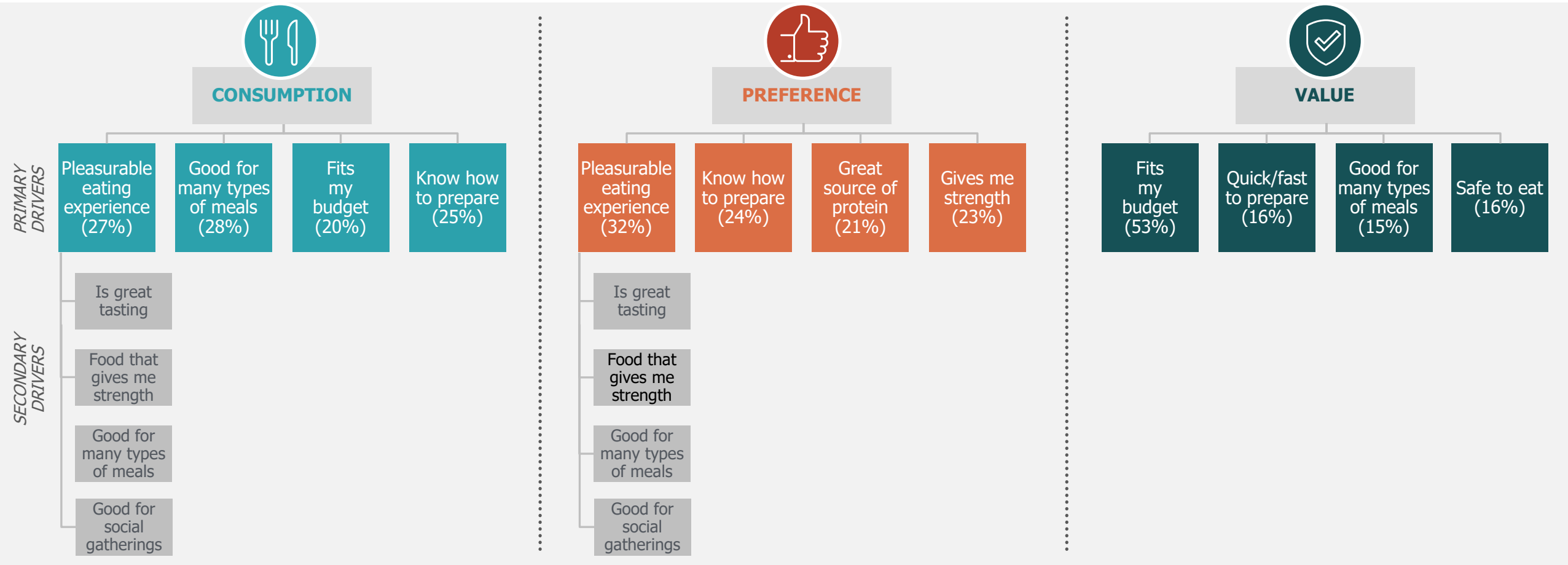
Consistent marks associated with beef as safe to eat and nutritious while other metrics showing declines since 2023.



Source: Consumer Beef Tracker 2018 – 2025. CR4: "Thinking about how cattle are raised for food in the U.S., please tell us how much you trust each of the following statements."
 Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

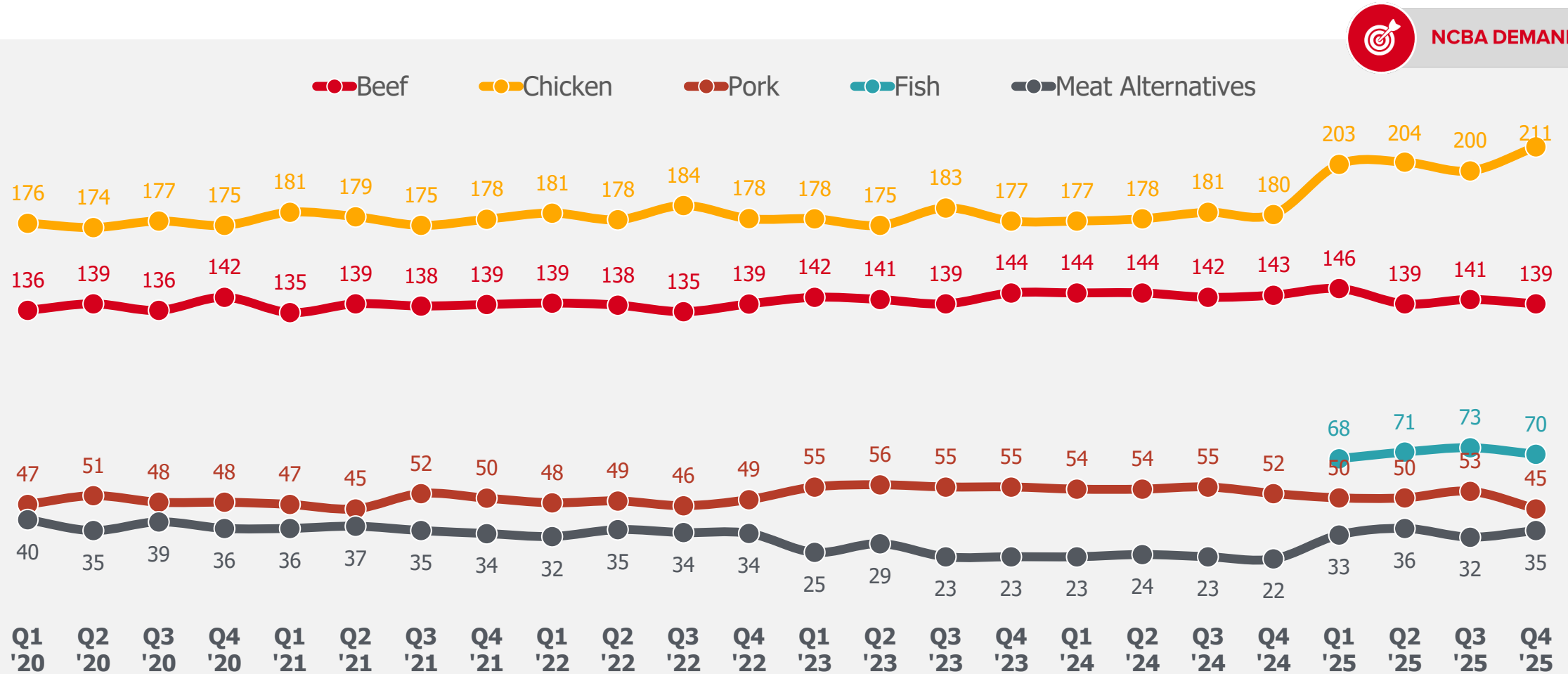
COMPONENT DRIVERS – New for 2026 *(based on 2025 data)*

Core drivers of consumption, preference and value return to more of the *foundational and basic drivers*, such as versatility, fits budget, source of protein, and knowing how to prepare the protein.



NCBA Demand Score Index*

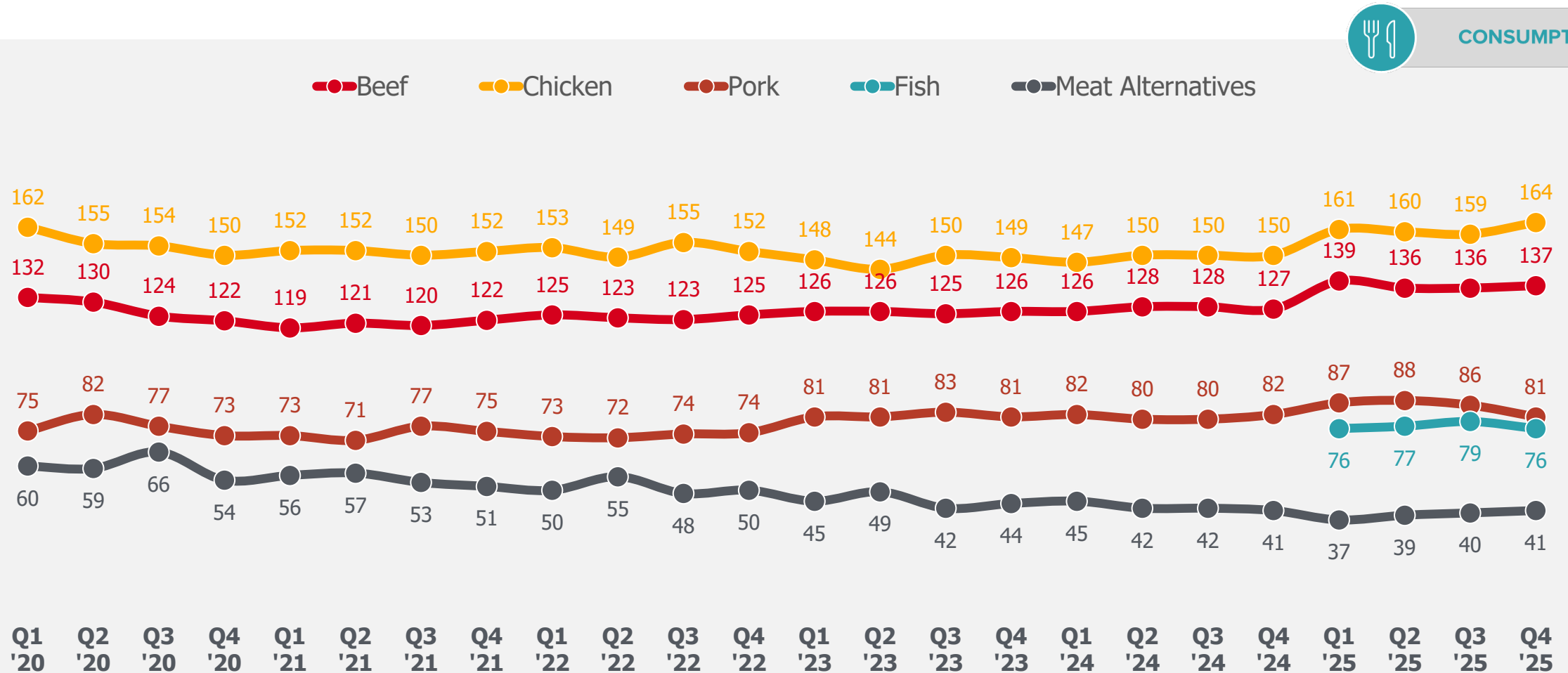
Relatively speaking, beef demand stays mostly flat verses previous years. Fish enters ahead of pork, though lagging far behind beef and chicken.



*Given the inclusion of Fish in the data collection of the KPIs and part of the analysis/index, it is recommended to view these changes with caution and instead view 2025 as a new comparison point for the future.
 Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Consumption Index*

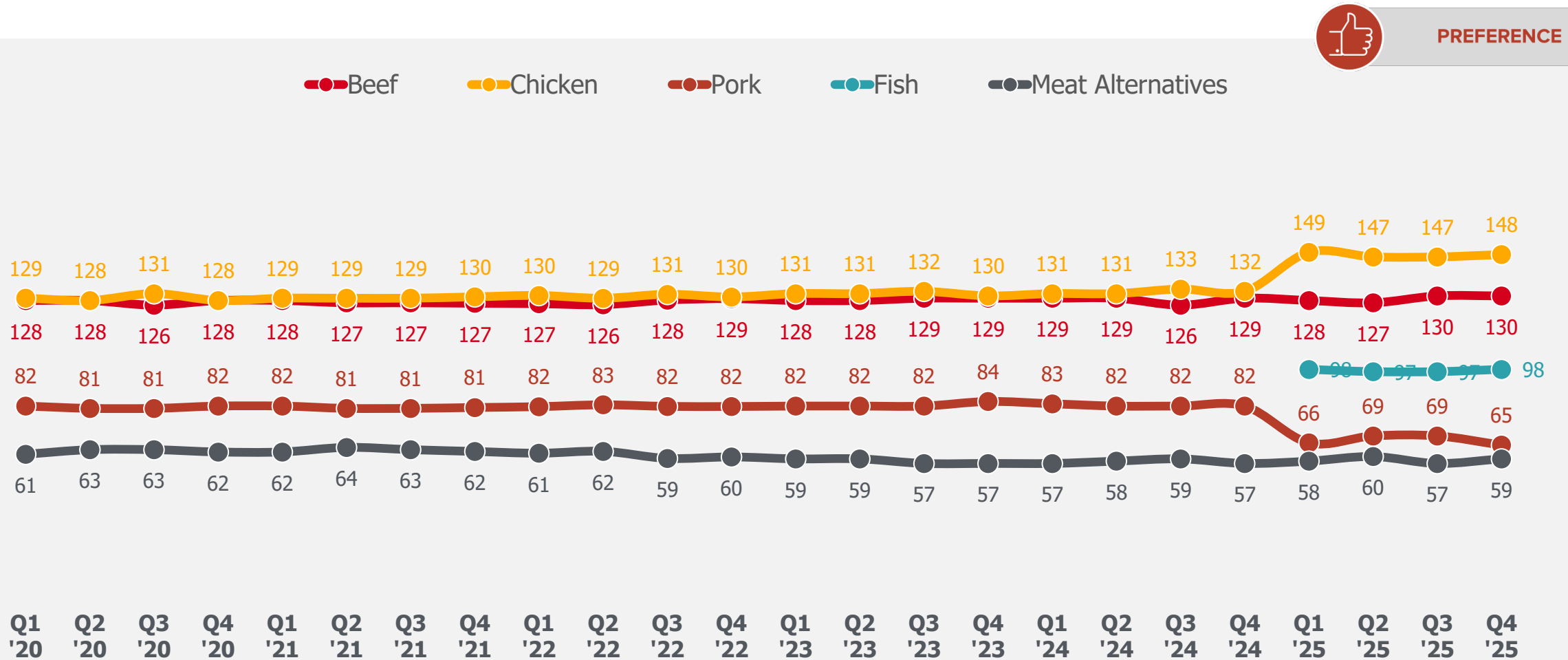
The Consumption Index has largely held steady throughout 2025, though Meat Alternatives continues to edge downward from previous years.



*Given the inclusion of Fish in the data collection of the KPIs and part of the analysis/index, it is recommended to view these changes with caution and instead view 2025 as a new comparison point for the future.
 Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Preference Index*

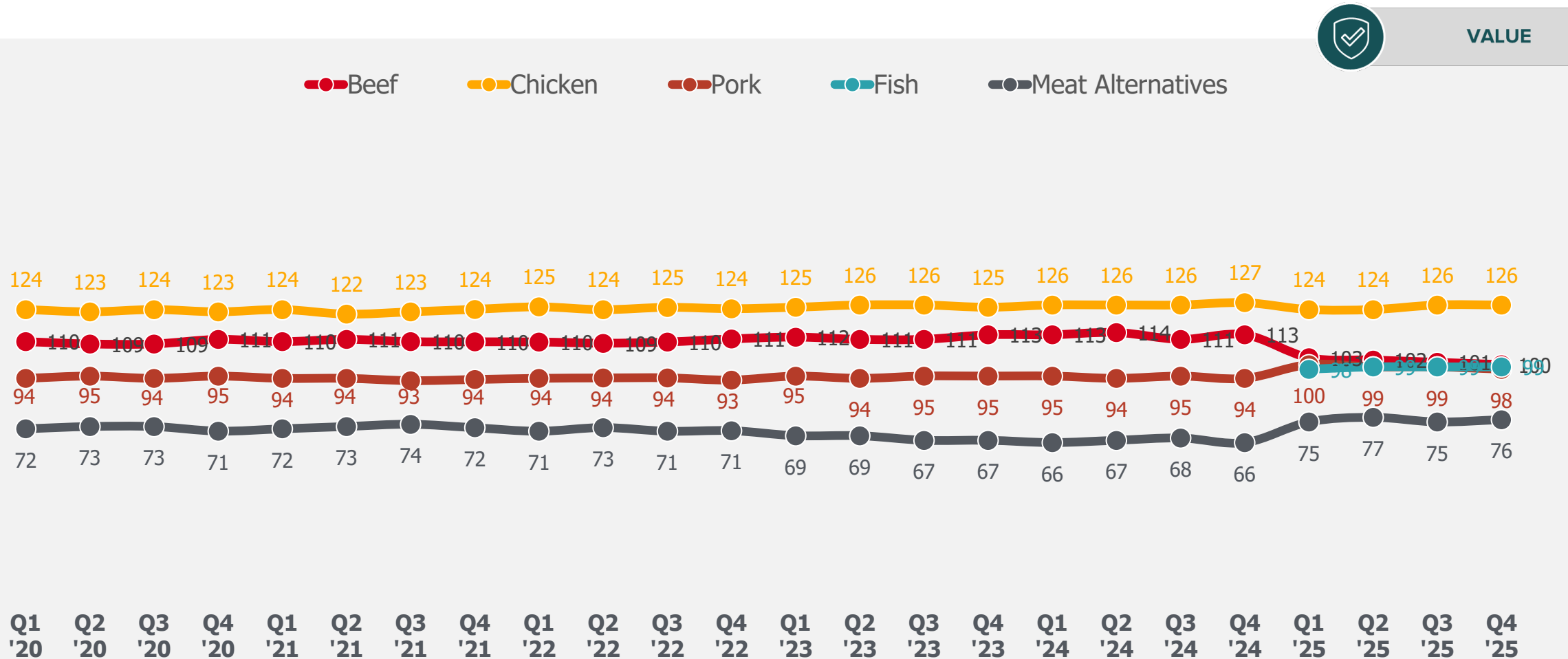
Chicken makes relative gains, while pork shows relative losses when fish is included in the comparison set.



*Given the inclusion of Fish in the data collection of the KPIs and part of the analysis/index, it is recommended to view these changes with caution and instead view 2025 as a new comparison point for the future. Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Value Index*

From a value perspective, beef shows relative losses and pork shows relative gains when fish is included in the comparison set.



*Given the inclusion of Fish in the data collection of the KPIs and part of the analysis/index, it is recommended to view these changes with caution and instead view 2025 as a new comparison point for the future.
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Component Drivers (Ranked 1st)

Beef maintains an advantage over Chicken several component drivers in 2025, with the greatest lead on eating experience, providing strength and taste.

Note: 2025 Ranked 1st data is impacted by the addition of Fish in the attribute perception rating/ranking beginning in Q1 2025.

		Q1 '22	Q2 '22	Q3 '22	Q4 '22	Q1 '23	Q2 '23	Q3 '23	Q4 '23	Q1 '24	Q2 '24	Q3 '24	Q4 '24	Q1 '25	Q2 '25	Q3 '25	Q4 '25	
PRIMARY DRIVERS	Pleasurable eating experience	28%	28%	30%	29%	27%	27%	25%	27%	27%	24%	24%	28%	15%	14%	13%	11%	
	Good for many types of meals	7%	7%	10%	11%	6%	3%	2%	6%	9%	4%	1%	4%	-9%	-7%	-8%	-10%	
	Fits my budget	-21%	-17%	-17%	-20%	-17%	-17%	-23%	-19%	-20%	-18%	-24%	-18%	-27%	-29%	-29%	-32%	
	Know how to prepare it	15%	17%	19%	19%	17%	12%	12%	16%	15%	15%	8%	17%	2%	4%	-1%	2%	
	Great source of protein	17%	21%	18%	20%	17%	14%	15%	14%	16%	15%	11%	16%	5%	7%	6%	3%	
	Food that gives me strength	22%	26%	25%	24%	21%	23%	25%	21%	25%	20%	19%	24%	11%	11%	9%	10%	
	Quick/fast to prepare	10%	7%	6%	2%	3%	11%	3%	6%	5%	6%	2%	7%	-4%	-1%	-4%	-5%	
	Safe to eat	17%	18%	17%	16%	12%	15%	16%	20%	19%	14%	13%	19%	5%	5%	3%	4%	
SECONDARY DRIVERS	Great tasting	27%	27%	26%	32%	29%	22%	26%	28%	29%	23%	24%	27%	12%	15%	13%	11%	
	Good for social gatherings	19%	20%	17%	15%	17%	16%	15%	19%	20%	20%	16%	20%	3%	2%	2%	1%	

Beef vs. Chicken Gap Analysis

Beef Ranked Higher

Chicken Ranked Higher



NCBA ATTITUDE SCORE GLOSSARY

OVERALL PERCEPTIONS

Overall Perceptions indicates consumers goodwill toward a protein. This metric represents the latent appeal for a protein which leads to future demand.

Overall Perception (Q.6/7/8)

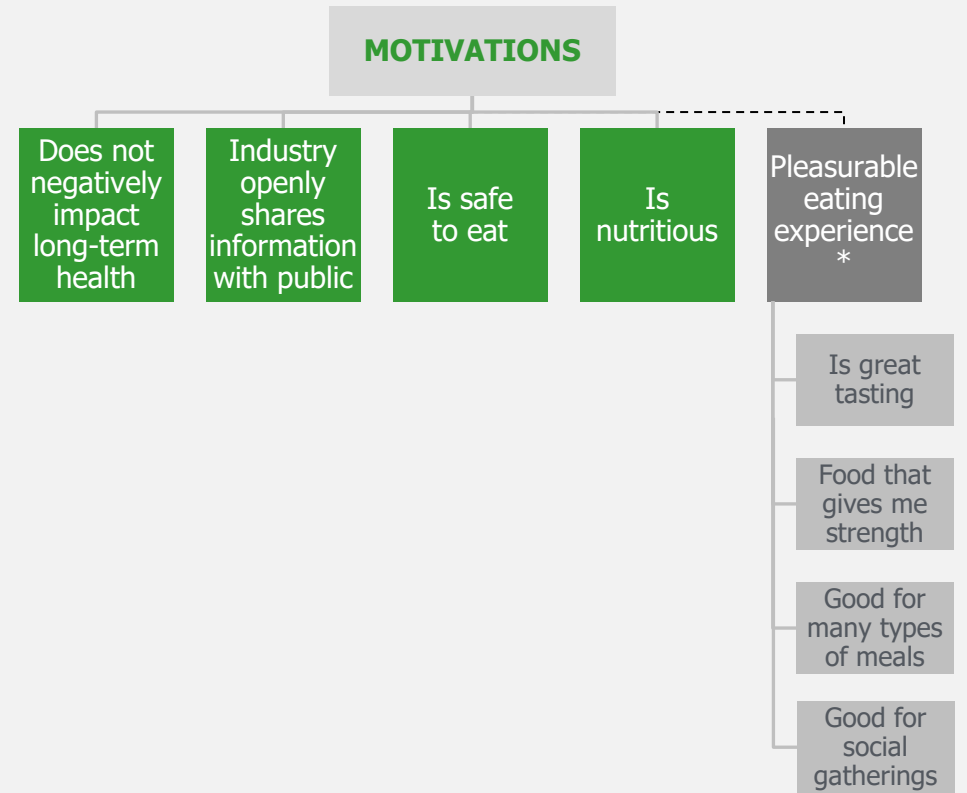
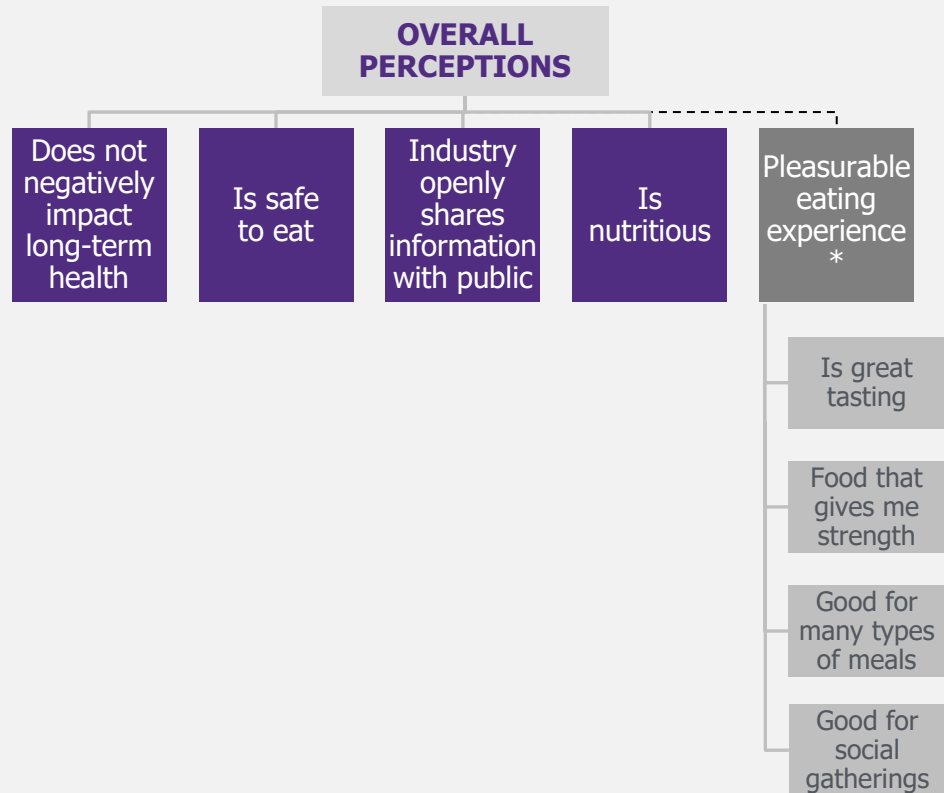
MOTIVATIONS

Motivations indicates consumers stated future intent toward a protein. This metric represents consumers top-of-mind future appeal toward a protein which also can be related to future demand.

Future Consumption Intent (Q.3)

NCBA TRUST DRIVERS – 2025

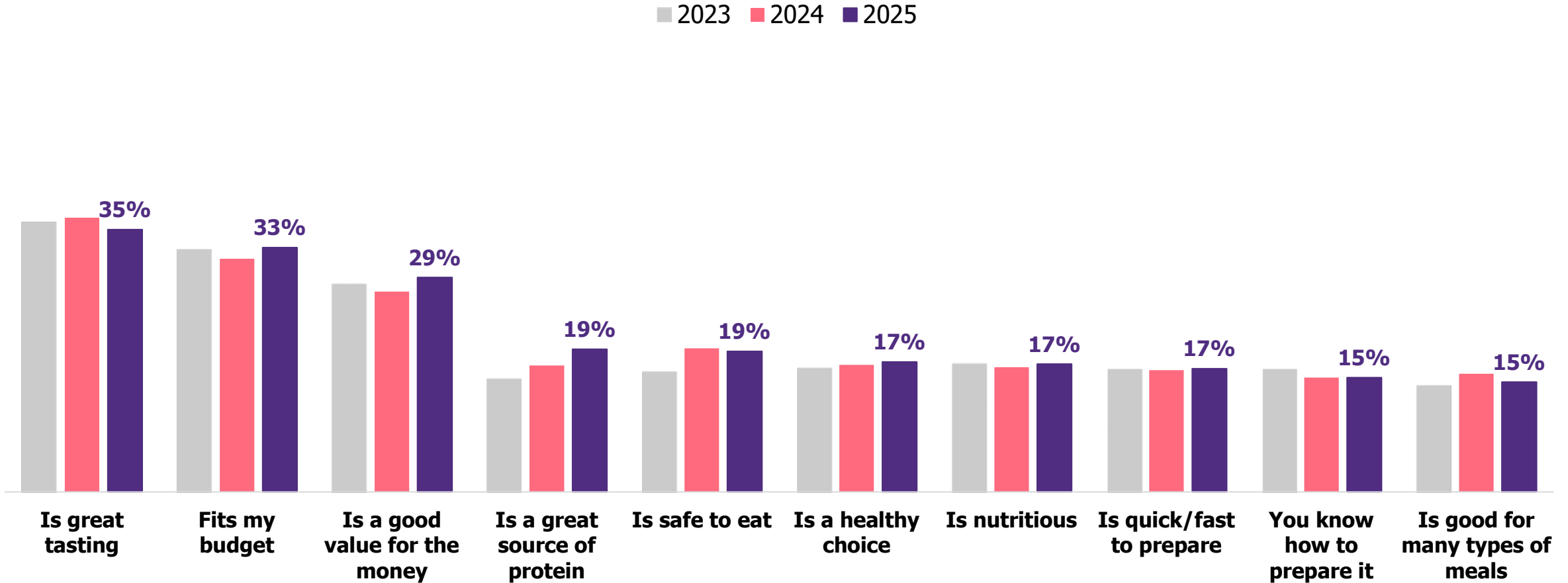
In 2025, Trust drivers shifted to transparency and safety, again more core drivers of trust.



*Analysis of "Pleasurable eating experience" and its components can be found on previous slides. 2025 Trust Driver modeling based on data collected January 2025 – December 2025. Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Top 3 Considerations for Protein at Home

Taste, budget, and perceived value are most important to consumers when choosing a meal with protein at home.



Source: Consumer Beef Tracker 2022 – 2025. Q10a: Now we would like you to choose the top 3 factors that you most consider when deciding to have a meal at home with beef, chicken, pork, fish, 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.

Thank You.



Funded by Beef Farmers and Ranchers