

# Today's Beef Consumer

Summer 2026 Update

## Consumers' Top Five Priorities

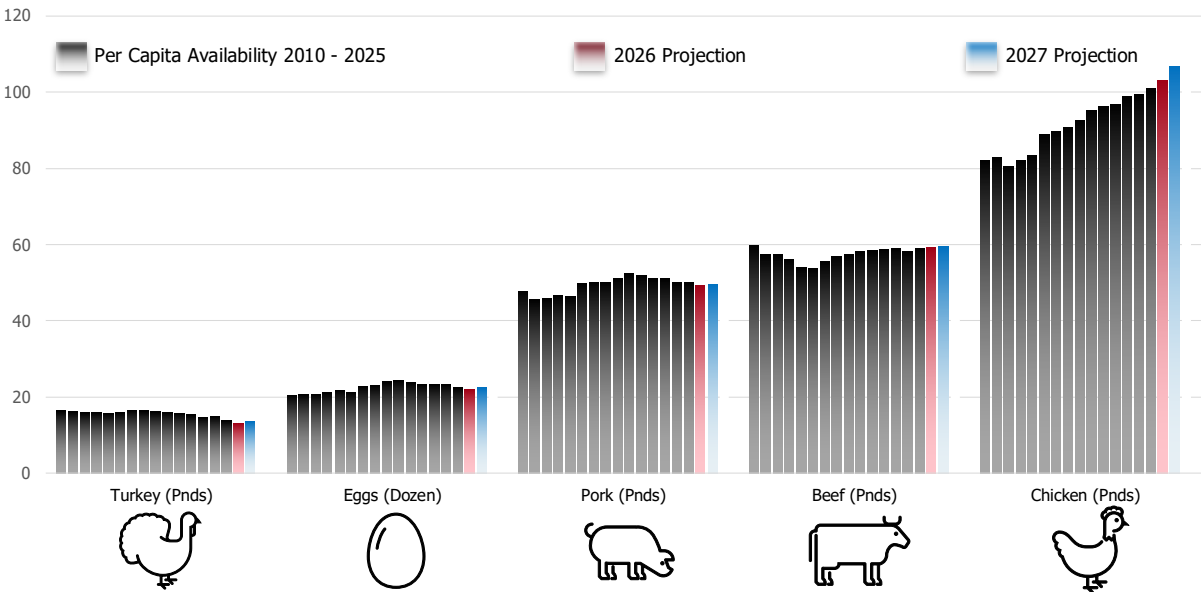
- 1. **Value:** Consumers are increasingly focused on getting the most from every food dollar, balancing budget considerations with quality, satisfaction and versatility.
- 2. **Convenience:** Easy-to-prepare meal solutions continue to play an important role in busy household routines.
- 3. **Protein & Nutrition:** Consumers continue to prioritize protein and seek foods that deliver both nutritional value and eating satisfaction.
- 4. **Taste & Enjoyment:** Flavor remains a leading driver of food choices, helping shape how consumers evaluate protein options.
- 5. **Deliberate Spending:** Households are becoming more intentional about how they shop, prepare and use food as they navigate higher costs.

Together, these priorities shape how consumers evaluate all protein options and help explain why beef continues to maintain a strong position despite higher prices and increasing competition from other protein sources. The National Cattlemen's Beef Association (NCBA), a contractor to the Beef Checkoff, continuously tracks trends, monitors issues and stays abreast of developments that have the potential to impact the beef industry to better understand **Today's Beef Consumer**.

## Beef Demand Remains Resilient

The U.S. cattle herd is the smallest it has been in 75 years, creating ongoing supply challenges for the beef industry. Despite these constraints, USDA data project per-capita beef availability will remain relatively stable through 2027 at 59 pounds per person, as record beef imports and heavier cattle weights particularly offset the smaller herd.<sup>1</sup> Among major animal proteins, chicken remains the most available at more than 105 pounds per person annually, while beef availability continues to exceed both pork (about 50 pounds per person) and turkey (about 14 pounds).<sup>1</sup>

## Estimated Yearly Availability



Source: USDA, Office of the Chief Economist, "World Agricultural Supply and Demand Estimates Report: July 2026" and Supporting Materials.  
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

The competitive protein landscape makes beef's recent performance particularly noteworthy. Over the latest 52-week period, beef delivered the strongest retail sales growth among the major proteins. Dollar sales increased

9.7% to \$47.1 billion, outpacing chicken, turkey, and pork, while volume also grew 2.1%.<sup>2</sup> Notably, growth occurred in both dollars and pounds sold, indicating that consumer demand remained resilient despite higher beef prices. Growth was observed across the category, with both ground beef and brisket sales each rising more than 13%, while value-added beef products posted gains in both sales and volume.<sup>2</sup>

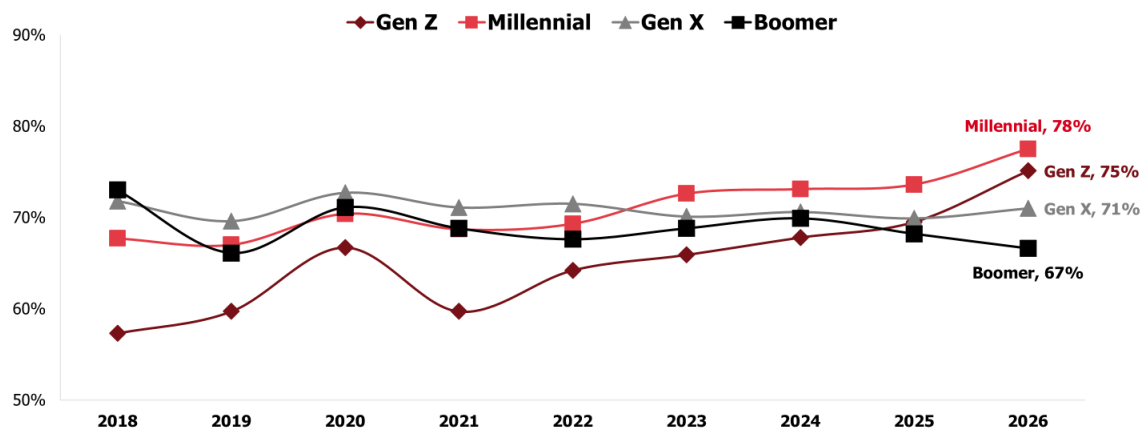
### National Sales - 52 Week Ending 7/12/2026

| Legacy Sub-Category      | 52-Week Dollar Sales |                | 52-Week Volume Sales |                | 52-Week Price per Volume |                |
|--------------------------|----------------------|----------------|----------------------|----------------|--------------------------|----------------|
|                          | Current              | % Change vs YA | Current              | % Change vs YA | Current                  | % Change vs YA |
| <b>AISLE-FRESH MEAT</b>  | \$82,102,214,011     | 7.1%           | 17,298,587,847       | 1.8%           | \$4.75                   | 5.2%           |
| <b>BEEF</b>              | \$47,119,777,037     | 9.7%           | 6,335,402,349        | 2.1%           | \$7.44                   | 7.4%           |
| BEEF STEAKS              | \$16,091,035,752     | 4.0%           | 1,424,467,125        | -2.4%          | \$11.30                  | 6.6%           |
| BEEF FRESH GROUND        | \$17,511,958,238     | 13.3%          | 2,910,159,296        | 1.3%           | \$6.02                   | 11.9%          |
| BEEF ROAST               | \$4,835,474,383      | 8.9%           | 708,520,912          | 4.0%           | \$6.82                   | 4.7%           |
| BEEF VALUE ADD           | \$4,351,304,245      | 8.9%           | 653,534,891          | 5.7%           | \$6.66                   | 3.0%           |
| BEEF BRISKET             | \$707,669,268        | 13.5%          | 144,354,148          | 3.3%           | \$4.90                   | 10.0%          |
| <b>CHICKEN</b>           | \$21,035,954,147     | 4.6%           | 6,787,258,450        | 3.0%           | \$3.10                   | 1.6%           |
| <b>TURKEY</b>            | \$3,450,874,322      | 5.2%           | 1,239,778,043        | -1.4%          | \$2.78                   | 6.7%           |
| <b>PORK</b>              | \$8,800,388,360      | 2.3%           | 2,712,614,222        | 0.2%           | \$3.24                   | 2.0%           |
| <b>MEAT ALTERNATIVES</b> | \$244,023,559        | -8.8%          | 27,416,703           | -9.3%          | \$8.90                   | 0.5%           |

Source: Circana, Fresh Meat Sales by Volume and Value, Data Ending 7/12/2026.

Consumer research reinforces the strength of beef demand. According to NCBA's Consumer Beef Tracker, 74% of consumers report eating beef at least weekly, up five percentage points since 2021.<sup>3</sup> In part, Millennials and Gen Z protein preferences are driving the overall increase in weekly or more beef consumption.<sup>3</sup> Beef is also one of the most frequently consumed proteins, second only to chicken (86%).<sup>3</sup> Looking ahead, more than 80% of consumers say they plan to maintain or increase their beef consumption.<sup>3</sup> Among those who expect to eat more beef, taste is the leading motivation, while price sensitivity is the primary reason consumers may eat less beef.<sup>3</sup> These findings highlight both the strength of beef's consumer appeal and the importance of value in today's marketplace.

### Weekly+ Beef Consumption by Generation



Source: Consumer Beef Tracker, 2019 – June 2026. Q1: "Thinking about all of your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of food?"  
Analysis provided by National Cattlemen's Beef Association, a contractor to the Beef Checkoff

### Redefining Value

Consumers increasingly define value as more than price alone. While budget remains a key consideration when choosing a meal with protein, consumers also prioritize taste, quality, nutrition, and versatility.<sup>3</sup> For beef, this means competing on more than cost per pound. Value is not simply about finding the lowest-priced option; it is

about whether consumers believe a product is worth the money. Despite higher prices, consumers continue to choose beef when it delivers the attributes they value most, including taste, quality, protein and meal satisfaction.

Convenience has also become an important part of that value equation. As households balance busy schedules with ongoing budget pressures, consumers are looking for foods that simplify meal planning and preparation without sacrificing quality or satisfaction. Consumer Beef Tracker data show that quick weeknight meals and grilling occasions remain central to meal routines, while younger consumers are more likely to incorporate meal prep, air fryer cooking and other time-saving approaches into their routines.<sup>3</sup> For beef, this creates opportunities for products that deliver value, convenience and flexibility across a variety of meal occasions.

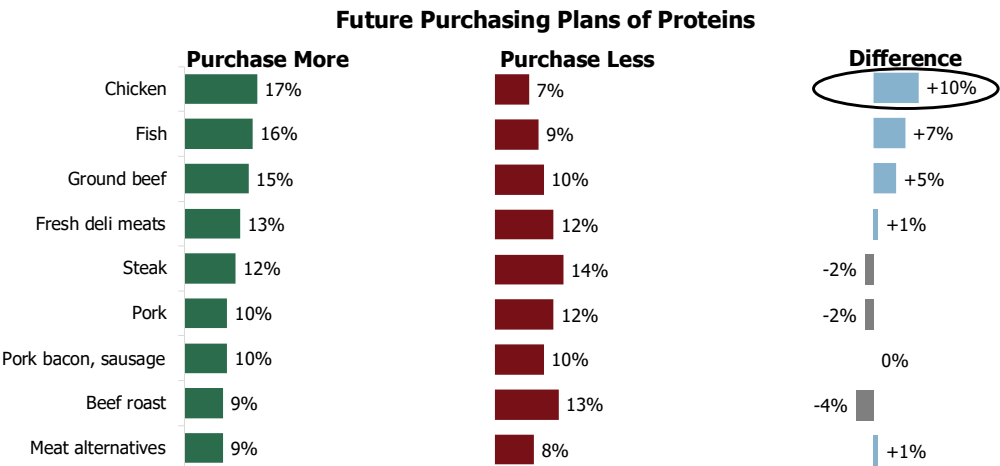
These priorities are reflected in beef purchasing behaviors. Consumers continue to prioritize freshness and quality when purchasing fresh beef, reinforcing that value is about balancing cost with the overall eating experience.<sup>3</sup> Ground beef remains the most commonly consumed beef item at home, reflecting its ability to deliver versatility, convenience and value across a wide range of meal occasions.<sup>3</sup> In fact, ground beef and value-added beef products have also been among the category's strongest performing segments over the past year.<sup>2</sup>

Shoppers are More Deliberate

June 2026 Consumer Price Index data show food-at-home prices increased 2.7% year-over-year, while food-away-from-home prices rose 3.4%.<sup>4</sup> Although annual food inflation has moderated, food prices remain well above pre-pandemic levels, and the cumulative impact of several years of higher prices continues to shape consumer behavior. Since June 2020, overall food prices have increased 30%, food-at-home prices are up 26%, and beef and veal prices have risen 35%.<sup>4</sup> As a result, consumers are becoming more intentional in how they shop, plan and prepare meals.

Nearly three quarters of meals are now prepared at home, reflecting a continued focus on home cooking as households navigate a higher-cost food environment.<sup>3</sup> Consumers report dining out less often, looking for deals more frequently, using leftovers creatively and freezing food to reduce waste.<sup>3</sup> These behaviors suggest consumers are actively managing food budgets rather than eliminating the foods they enjoy.

For beef, these shifts present both challenges and opportunities. Consumers indicate they plan to purchase more chicken, ground beef and fish while reducing purchases of higher-priced beef cuts such as steaks and roasts.<sup>3</sup> Rather than abandoning beef, many households are adjusting how they incorporate it into meal routines and becoming more strategic in the products they choose.



Source: Consumer Beef Tracker, January– March 2026. Q23: For each of the following items, please select whether you plan to purchase more, less, or the same amount, compared to 2025. Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

These behaviors reflect a consumer who is adapting rather than abandoning the category. As consumers become more selective, reinforcing how beef delivers taste, protein, versatility and value across a variety of meal occasions will remain increasingly important.

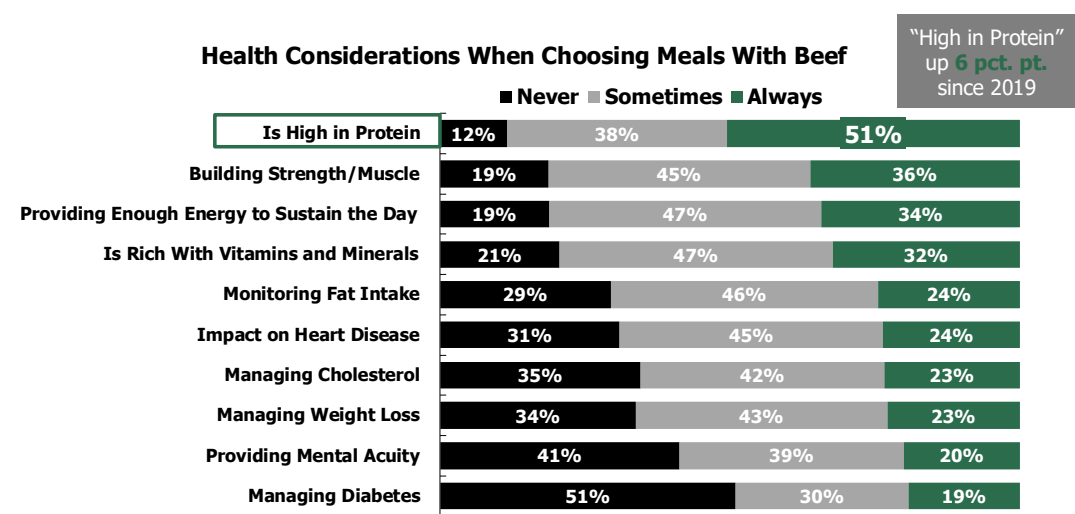
Protein Remains a Priority

Nutrition remains an important factor in meal decisions, and protein continues to be one of the strongest drivers of food choice. As consumers become more intentional about the foods they buy, they increasingly look for options that deliver both nutritional value and eating enjoyment.

Protein is now available in a growing range of foods and beverages, from fortified snacks and bars to dairy products and traditional animal proteins. As consumers become more focused on meeting protein goals, competition increasingly centers on which foods can deliver protein alongside taste, satiety and overall meal satisfaction.

Beef is well-positioned within this environment because consumers already associate it with high-quality protein and meal satisfaction. Reinforcing beef's role as a nutrient-dense protein choice can help maintain relevance as consumers evaluate an expanding range of protein options.

When consumers think about meals that include beef, protein is among the most important health-related considerations.<sup>3</sup> Beef is also viewed positively across a range of attributes that align with consumer priorities. Consumers score beef particularly well for taste, protein, enjoyment and versatility, reinforcing its position as a satisfying and nutritious meal choice.<sup>3</sup> Consumers increasingly expect both nutrition and enjoyment from the foods they choose, and beef continues to compare favorably on both dimensions.



Source: Consumer Beef Tracker, January–June 2026, BB14r1: How often do you think about each of the following when choosing a meal with beef? (Select one response for each row.) Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Looking Ahead

The priorities shaping today's food decisions are clear: value, convenience, protein, taste and more deliberate spending. While households are becoming increasingly intentional in how they shop and prepare meals, they continue to prioritize food that delivers across these needs.

Beef continues to earn its place on the menu by providing the taste, protein, versatility and satisfaction consumers value most. In a marketplace where shoppers are weighing every food dollar, those strengths remain important.

Sources

- 1. USDA, Office of the Chief Economist, “World Agricultural Supply and Demand Estimates Report: July 2026” and Supporting Materials.
- 2. Circana, Fresh Meat Sales by Volume and Value, Data Ending 7/12/2026.
- 3. Consumer Beef Tracker, 2026.
- 4. U.S. Bureau of Labor Statistics, Consumer Price Index, Not Seasonally Adjusted, July 2026 Release.