



Meat in the US

December 2025

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Meat in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail drives volume sales and growth

INDUSTRY PERFORMANCE

Beef drives total volume sales growth but poultry tops demand as a more affordable protein provider

Trade and cattle cycle trends impact domestic beef availability

Premiumisation trend in beef concentrates around affluent consumers

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Beef faces volume pressure from persistent supply constraints and consumer price thresholds

Stable channel dynamics

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Positive total volume sales growth amidst persistent challenges

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Pulses gain momentum as economical, health-orientated options

Climate change creates production challenges

Weather conditions inform production and price volatility

WHAT'S NEXT?

Climate and trade dynamics to heavily inform supply

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