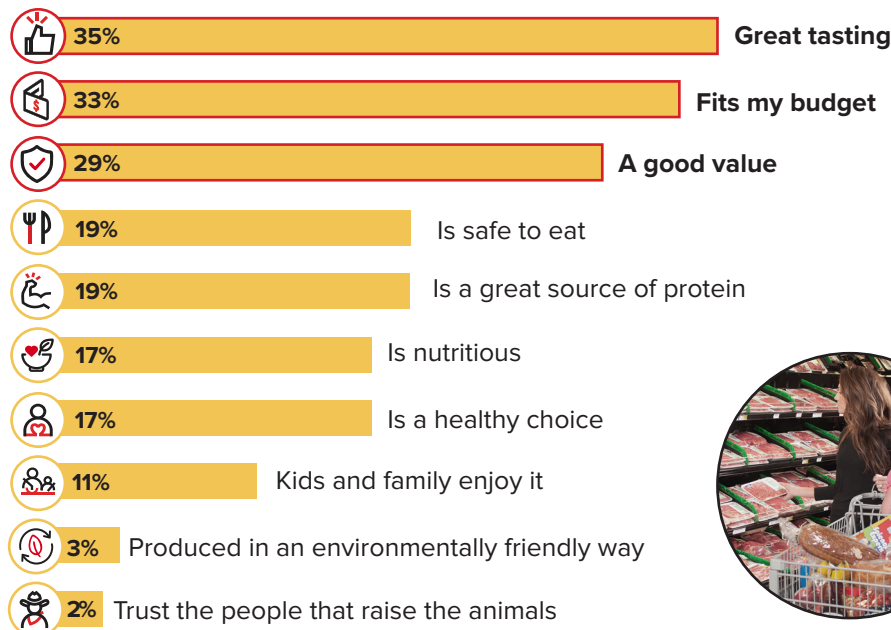


2025 Beef Consumer Survey

Across the U.S., consumers prioritize taste and value when choosing protein. In Pennsylvania, beef remains a staple, with strong consumption levels and opportunities to further engage through meal solutions and increased transparency.

NATIONAL CONSUMER PRIORITIES WHEN CHOOSING PROTEIN

Among U.S. consumers, **taste**, **budget**, and **value** lead decision-making when selecting proteins for at-home meals.



Key Findings: Pennsylvania Consumers and Market Trends Support Beef

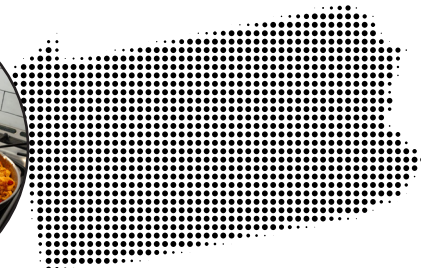
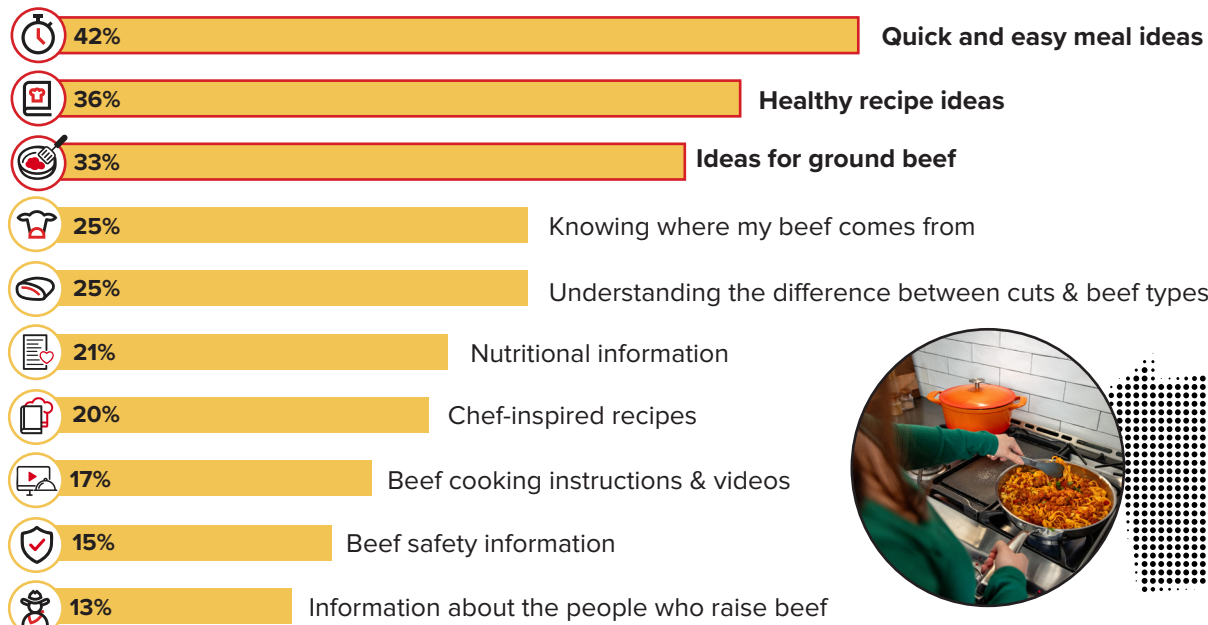
72% of Pennsylvanians eat beef weekly and expect to **maintain consumption**.

Taste and value drive protein decisions, positioning beef competitively.

Beef leads retail growth in Pennsylvania, with +12.2% dollar and +4.3% volume gains.

ENCOURAGING BEEF CONSUMPTION IN PENNSYLVANIA

Which of the following would encourage Pennsylvania consumers to prepare or eat beef meals more often?

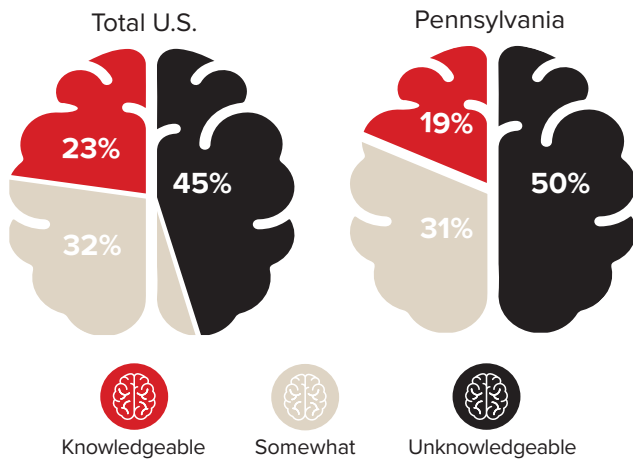


**Significant differences in attributes for consideration are bolded and boxed between the U.S. and Pennsylvania.
Source: Consumer Beef Tracker, Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff*

Beef Production Knowledge: An Opportunity to Build Understanding

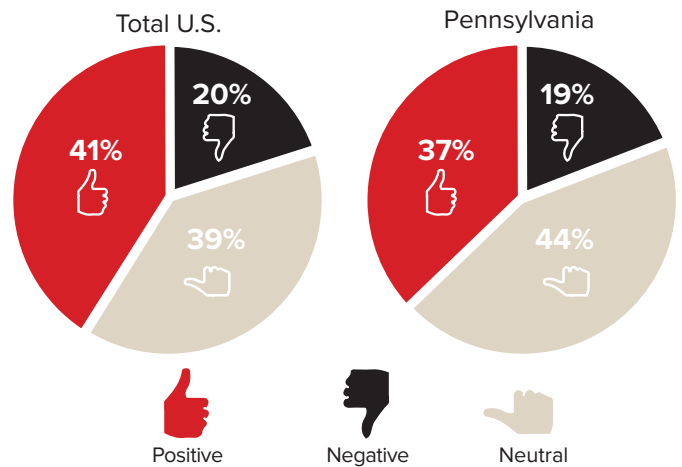
PRODUCTION KNOWLEDGE

Consumer knowledge of beef production is limited across Pennsylvania and the U.S., presenting an opportunity to build understanding and trust.



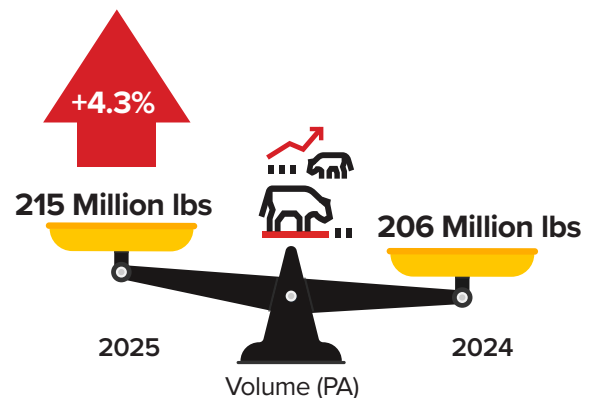
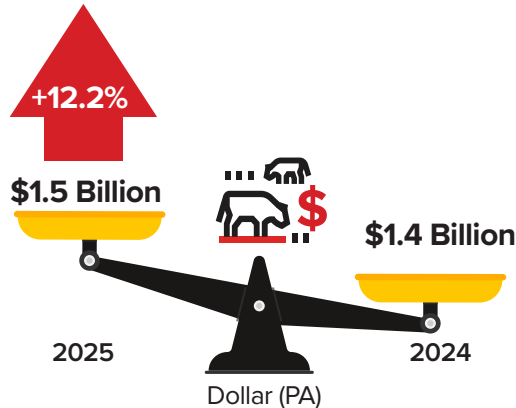
PRODUCTION PERCEPTION

Mixed perceptions of beef production across Pennsylvania and the U.S. highlight an opportunity to strengthen consumer confidence.



Beef in Retail: Beef Continues to Drive Growth in Pennsylvania

Retail performance reinforces beef's strong position, with growth in both dollars and volume over the past 52 weeks.



Opportunities for Continued Success

DEMAND DRIVERS OPPORTUNITY

Pennsylvania consumers may be inspired to eat beef more often by having quick and easy meal ideas using beef, healthy recipe ideas, ideas for how to use ground beef, as well as more information about knowing where their beef comes from.

EDUCATION & PERCEPTION OPPORTUNITY

Lower knowledge and less positive perceptions of beef production highlight an opportunity to increase transparency, build understanding, and strengthen trust.

