

Domestic and International Sources of US Lean Beef Trimmings

Brian K. Coffey (bcoffey@ksu.edu) – K-State Department of Agricultural Economics

August 2026

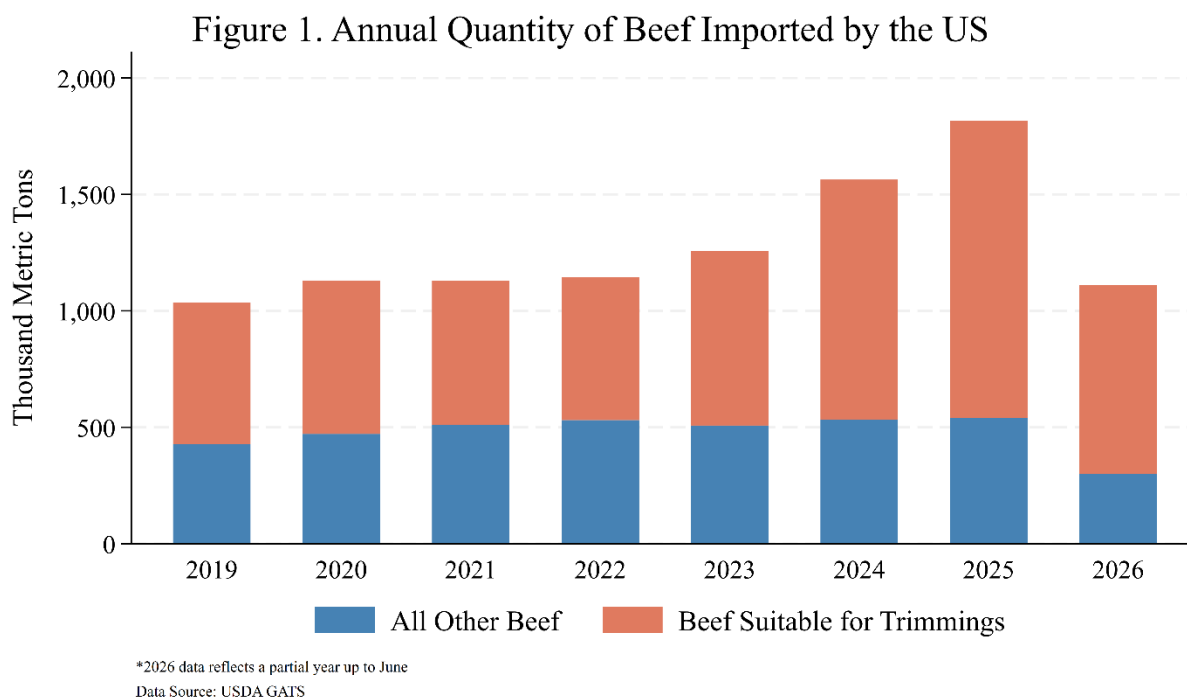
Ground beef consumption is a major portion of US beef consumption at retail (both fresh and in prepared products) and in food-away-from-home meals. Achieving a lean-to-fat ratio that meets customer and consumer needs usually requires blending beef trimmings from multiple sources. The dynamics and importance of the US ground beef market and our need for lean trim is widely discussed and is increasingly important given current market dynamics (e.g., see [this Drovers article](#)). US processors get most higher fat (e.g., 50% lean to 50% fat) beef trimmings from domestic fed cattle slaughter. Lean trimmings (e.g., 90% lean to 10% fat) come from two major sources: 1) domestic slaughter of beef cows, dairy cows, and bulls and 2) beef imports. The availability and prices of these two sources of lean beef trimmings are impactful on US import behavior. The purpose of this article is show the shifts in US usage of these two sources of lean beef trim since 2019.

US Beef Imports

US beef imports are most easily and often described by gross tonnage but, like every other part of cattle and beef supply chains, total pounds does not tell the whole story. [Muhammad, Martinez, and Wyatt \(2025\)](#) give a very informative summary of evolution of US beef trade in recent years. One point that bears repeating is that not all imported beef is used for the same purpose. A major division in imported beef is between higher-value cuts/products and boneless beef sourced to become lean trimmings that go into a ground beef blend. Tracking exactly how much imported beef is used for what purposes is a complicated endeavor. [Tonsor and Peel \(2022\)](#) explain some of the data options and choices available to do so in their paper that thoroughly documents US beef importing behavior between 2013-2022. I opted to use the [USDA Foreign Agriculture Service Global Agriculture Trade System](#) (USDA GATS).¹ USDA GATS allows access to historical import and export data delineated by trading partner and products as defined by [Harmonized Tariff Schedule \(HTS\) codes](#).

To gain an understanding of shifts in US beef imports over the past several years, I collected monthly total US beef imports, segregated by HTS codes from the USDA GATS system from 2019 to June 2026. I identified 12 HTS codes (listed in the appendix) that correspond to imported beef that is most likely destined to become lean beef trimmings. This is not a completely accurate method of identifying beef trim but it captures the majority of beef imported for that purpose and, if anything, slightly underestimates the quantity. Figure 1 shows the total quantity of beef imported by the US each year since 2019. Note that 2026 is based only on January to June data. The orange portion of the bars corresponds to the total tonnage attributed to the 12 HTS codes for boneless product used in trim.

¹ I will provide specific USDA GATS query settings used for anyone interested.

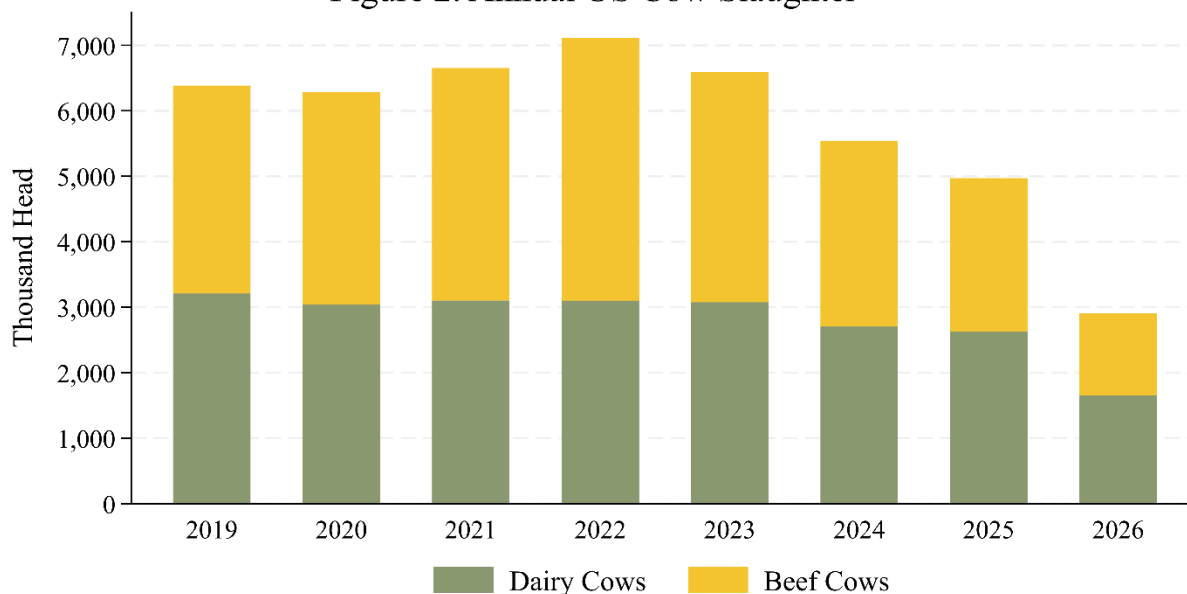


The 75% increase in imports between 2019 and 2025 is almost entirely due to increases in importing beef for lean trim as that category doubled over those six years. All other beef imports, which would include higher value cuts and products, increased by 26%.

Domestic Non-fed Slaughter

Since 2019, the US has experienced large changes in domestic non-fed slaughter, which is the other major source of lean beef trimmings. This is especially true for beef cow slaughter. Figure 2 shows the total annual cow slaughter, segregated by beef and dairy, since 2019. 2026 data include all weeks up to August 8th. 2019 was the latest peak of the US beef cow herd in the cattle cycle. Drought and market dynamics drove aggressive herd liquidation over the next few years, as is evidenced in the increases in beef cow slaughter. However, liquidation slowed and beef cow slaughter has shown year over year decreases since 2023.

Figure 2. Annual US Cow Slaughter



*2026 data reflects a partial year up to August 8th

Data Source: USDA NASS as archived by Livestock Marketing Information Center

Fewer total cows slaughtered means a decrease in the availability of domestic lean beef trimmings. From 2022 to 2025 that decrease has been substantial. Though the rate will slow, that trend will likely continue in 2026.

Comparing the Shifts in Imports and Cow Slaughter

It is informative to compare how the changes in these two sources of lean beef trimmings relate to each other. Cow slaughter is reported in head and it is not possible to know for certain the total pounds of beef provided to the food system or in exactly what form. However, a [reasonable estimate would be that one cow \(beef or dairy\) will provide about 375 pounds of lean trim](#). Using that number, we can approximate the impact of changing cow slaughter on the availability of lean beef trimmings domestically.

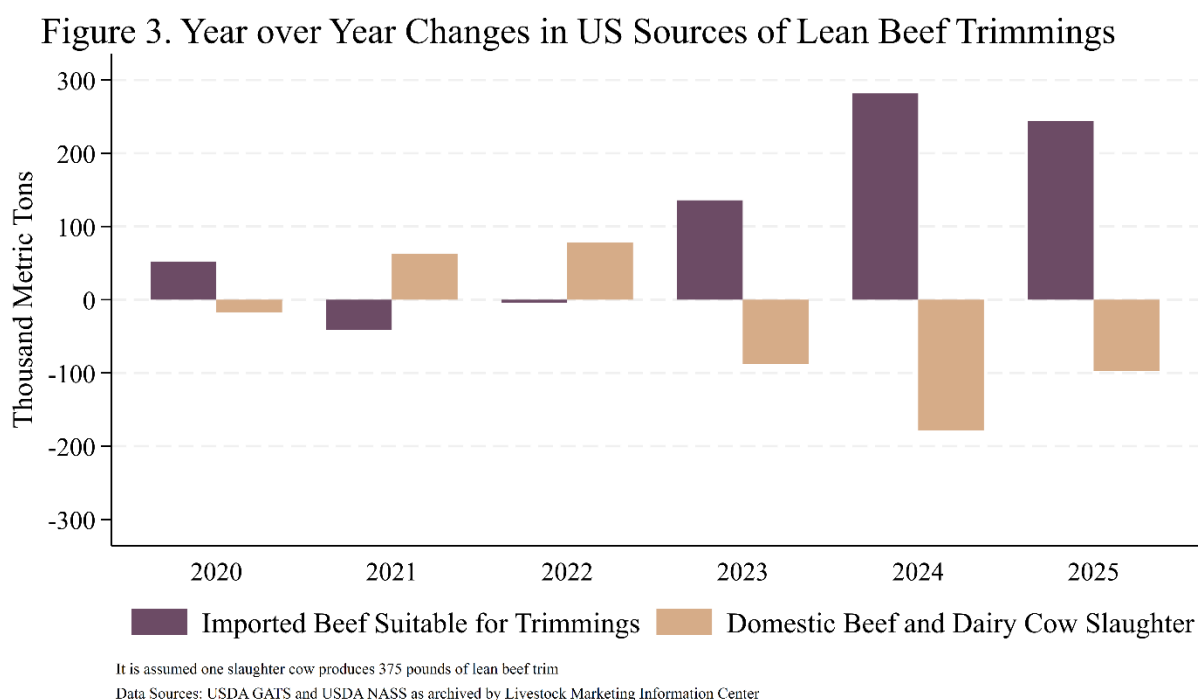


Figure 3 compares the shifts in quantity of beef imported for lean trimmings and quantity of lean beef trimmings from domestic cow slaughter. Notice the strong negative relationship between the two measures. During the years of herd liquidation when domestic cow slaughter was increasing, the US decreased imports of beef for trimmings. More recently, as supplied of domestic lean trim declined, the US ramped up imports. It is worth noting that, from 2023 to 2024 and from 2024 to 2025, total beef consumption in the US also increased. In that case, the uptick in imports was likely also driven by a need for more total pounds of beef and not just to fill the void of domestic lean trimmings created by decreased cow slaughter.

Conclusions

This analysis is not meant to quantify a direct causal relationship between imported beef for lean trimmings and domestic beef for lean trimmings, as there are several other socio-political and consumer demand factors that impact imports. However, the data in Figure 3 demonstrates that imports for trimmings are not likely replacing US grown beef but, rather, complementing our domestic supply as current conditions necessitate. Given the importance of ground beef to the US beef sector, this balance between sourcing lean beef trimmings domestically and abroad is critical to remember in any discussion of US trade policy, as it relates to beef.

Appendix

Identifying the quantity of beef imported into the US to be used a specific purpose with certainty is generally not possible. The estimates in this paper required approximating the quantity of beef imported by the US that is likely used to formulate lean beef trimmings. To accomplish that, I tracked beef allocated to the following Harmonize Tariff Schedule (HTS) codes in Table A1.

Table A1. Definitions of Harmonized Tariff Schedule Codes Used to Designate Beef Imports as “Suitable for Trimmings”

HTS Code	U.S. Government Official Description
0201.30.50.75	Meat of bovine animals, fresh or chilled: Boneless: Other: Flank or plate cuts
0201.30.50.85	Meat of bovine animals, fresh or chilled: Boneless: Other: Other (NESOI - Not Elsewhere Specified or Included)
0201.30.50.91	Meat of bovine animals, fresh or chilled: Boneless: Other: Certified organic
0201.30.50.97	Meat of bovine animals, fresh or chilled: Boneless: Other: Other
0201.30.80.90	Meat of bovine animals, fresh or chilled: Boneless: Other (over Tariff-Rate Quota limit): Other (excluding bison)
0202.30.50.75	Meat of bovine animals, frozen: Boneless: Other: Flank or plate cuts
0202.30.50.85	Meat of bovine animals, frozen: Boneless: Other: Other (NESOI - Not Elsewhere Specified or Included)
0202.30.50.91	Meat of bovine animals, frozen: Boneless: Other: Certified organic
0202.30.50.97	Meat of bovine animals, frozen: Boneless: Other: Other
0202.30.80.00	Meat of bovine animals, frozen: Boneless: Other (over Tariff-Rate Quota limit)
0202.30.80.15	Meat of bovine animals, frozen: Boneless: Other (over Tariff-Rate Quota limit): Certified organic
0202.30.80.25	Meat of bovine animals, frozen: Boneless: Other (over Tariff-Rate Quota limit): Other

Note: Definitions were from the US International Trade Commission and were extracted using Google Gemini from their website: <https://hts.usitc.gov/>. Between 2019 and June 2026, there were 78 HTS codes listed in the USDA GATS data. Not all codes were present in all years. Some codes come and go based on current trade policy. My goal was to arrive at a reasonable estimate for quantity of beef that is likely imported to be used as lean trim. The 12 products in Table A1 fit that description. There are likely others that do as well but this approach should capture the overwhelming majority of boneless beef imported to be used as lean trimmings.

For more information about this publication and others, visit AgManager.info.
 K-State Agricultural Economics | 342 Waters Hall, Manhattan, KS 66506-4011 | 785.532.1504
www.ageconomics.k-state.edu
 Copyright 2026: AgManager.info and K-State Department of Agricultural Economics

