Original Research

Masterestaurant 2026 *Food Cost* Analysis: Before and After Automating Theoretical Cost

By **Diego F. Parra** · Updated 2026-09-16 · Costing & Finance

QUICK VERDICT

The 2026 food cost problem is not the purchase price, it is the variance nobody measures: USDA ERS forecasts +3.2% across all food and +7.5% for beef in 2026, while limited-service prime cost already consumed 65 cents of every sales dollar in 2024, per the National Restaurant Association. Before automation, an owner compares this month's invoices with last month's and arrives late. After it, the system compares standardized recipe against actual consumption daily, and the error surfaces while it can still be fixed. The ceiling still holds: 32% food cost per dish is a MAXIMUM, never a target.

Masterestaurant Study / Sector Synthesis Expert synthesis · cited industry sources · 19 min read · 2026-09-16

A full-service restaurant in Mexico City closes 2025 at 34% food cost and the owner swears the buying was clean. The buying was clean. What he never learned was how much walked out the back door as waste, overportioning and remade plates, because his only instrument was supplier invoices divided by sales. That aggregate actual food cost is a rear-view mirror: it reports an accident that already happened.

The 2026 pressure is documented. USDA ERS, in its June 2026 Food Price Outlook, forecasts +3.2% across all food, +7.5% for consumer beef prices —with the U.S. cattle herd at a 75-year low— and +5.7% for nonalcoholic beverages and coffee. Food away from home rises +3.6%, ahead of groceries at +2.8%. That spread is the trap: input cost runs faster than any guest's willingness to lift your average ticket.

Diego F. Parra and the Masterestaurant team synthesize public data from six organizations here to answer an operating question, not an academic one: where you land, what range is healthy for YOUR segment and YOUR size, and which decision each figure triggers. None of these numbers come from a proprietary sample; every one is cited to the organization and year that published it. The contribution is the reading, and that reading carries a declared bias: variance between theoretical and actual cost matters more than a purchasing percentage point.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE	AFTER · THEORETICAL AGAINST ACTUAL, MEASURED DAILY WITH AI
2026 input price pressure (all food, U.S.)	✕ +3.2% forecast (USDA ERS, Food Price Outlook 2026) absorbed undetected, because invoices arrive blended	✓ +3.2% (USDA ERS 2026) broken out by family: beef at +7.5% and coffee/beverages at +5.7% get isolated and re-costed separately
Prime cost, limited service (2024 median)	✕ 65 cents of every sales dollar (National Restaurant Association, Restaurant Operations Data Abstract 2025, 2024 data), with no split between food and labor	✓ Those same 65 cents (NRA 2025) split into COGS and labor against the 55-65% of sales target Toast publishes
Expected profit margin by segment	✕ Full service 3%-8% (WhippleWood CPAs, Restaurant Financial Benchmarks 2026) with no view of which units in the group hit it	✓ Full service 3%-8%, fast casual 4%-10%, quick service 5%-12% (WhippleWood CPAs 2026) applied unit by unit
Food waste and its return	✕ Invisible shrink, discovered at the quarterly inventory once the money already left in the dumpster	✓ US$7 in future benefit per US$1 invested in waste prevention, a 600% ROI documented by ReFED

	BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE	AFTER · THEORETICAL AGAINST ACTUAL, MEASURED DAILY WITH AI
Volatility in a single commodity	✕ Eggs climb +8.5% in 2024 and +21.9% in 2025 (USDA ERS) and the menu stays untouched until the accountant calls	✓ Arabica coffee hits US$4.41 per pound in February 2025, an all-time high (Bellwether Coffee), and menu engineering responds that week
Structural inflation of eating out	✕ Benchmarked against the 3.5% annual historical average (USDA ERS), assuming 2026 behaves the same	✓ Benchmarked against the +3.6% forecast for 2026 versus +2.8% at the grocery store (USDA ERS, June 2026), with ticket adjusted on evidence
Fixed cost that does not belong to the plate	✕ Rent and insurance get spread into the recipe cost and pollute per-dish food cost	✓ Rent near US$53 per sq ft annually in Los Angeles (Pepperlot 2025) and roughly US$1,359 a year in workers' compensation (MoneyGeek 2025) go to break-even, never to the plate

Finding 1 — Why does 2026 food cost break on variance rather than purchase price?

Because you negotiate purchase price once a quarter while variance bleeds every single day, shift after shift, with nobody recording it.

USDA ERS, in its June 2026 Food Price Outlook, projects +3.2% across all food, +7.5% for retail beef and +5.7% for nonalcoholic beverages and coffee; three painful numbers, yes, but public, forecast in advance and negotiable with your supplier. Back-door shrink shows up in no forecast at all. When a full-service restaurant closes the year at 34% actual food cost while its recipe costing said 29%, those five points were not set by the market: the operation set them. According to the National Restaurant Association (Restaurant Operations Data Abstract 2025, 2024 data), median limited-service prime cost already eats 65 cents of every sales dollar, and with 35 cents left for everything else, five points of variance decide whether you close the year with profit or just close.

Finding 2 — Aggregate actual food cost is a rearview mirror, and that is how almost everyone measures it

Adding up supplier invoices and dividing by monthly sales tells you about an accident that already happened. That number — cost of ingredients consumed over food sales for the same period — works for your accountant and fails your chef, because it lands thirty days late and never says WHERE. Masterestaurant sets 32% per plate as the admissible MAXIMUM, never as a target, and the distinction matters: payroll, rent and utilities are not loaded onto the plate, they are paid out of aggregate contribution margin. An owner who loads rent into recipe costing ends up with prices the market refuses. WhippleWood CPAs profit ranges for 2025-2026 — full service 3%-8%, fast casual 4%-10%, quick service 5%-12% — show how small the tolerable error is. At a 4% margin, one misread point of food cost takes a quarter of the year's profit. Theoretical cost comes from multiplying each standardized recipe costing by the units your point of sale registered as sold, and it is the only number actual cost can meaningfully be measured against.

Finding 3 — Theoretical cost: what the period SHOULD have cost, plate by plate sold

Without it you compare your 34% against some internet benchmark instead of your own recipe, which is the only legitimate judge. I got this wrong for years: I treated recipe standardization as a kitchen exercise when it is really an exercise in analytical accounting. A recipe does not exist until it exists in grams, with yield and trim loss declared. Take coffee: Bellwether Coffee documented arabica at a record $4.41 per pound in February 2025, and USDA ERS projects +5.7% for nonalcoholic beverages and coffee in 2026. If your espresso costing still carries a 2023 price, your theoretical lies and your variance measures noise. Variance is actual cost minus theoretical cost, in percentage points or hard money, and almost nobody produces it daily because it demands inventory, recipes and sales on one board. That is exactly why it stays uncomfortable.

Finding 4 — Food cost variance: the metric that separates a purchasing problem from an operating problem

If actual rises two points and theoretical rises two points, the market is your problem and the answer is menu engineering or price; if actual rises two points and theoretical stays flat, the problem is portioning, theft, sloppy receiving or refired plates, and the answer lives in the kitchen. Two opposite decisions that aggregate food cost never lets you tell apart. One number for scale: USDA ERS recorded US retail eggs up +8.5% in 2024 and +21.9% in 2025. A jump like that flows into theoretical immediately. What never flows into theoretical is the tortilla that hits the floor. Prime cost — COGS plus total labor cost, divided by sales — is the number Diego F. Parra checks before any other when he walks into an operation, because a single figure summarizes 60% to 70% of the cost structure. Toast and Restaurant365 set the industry rule between 55% and 65% of sales, with a healthy target at 60% or below, and Nation's Restaurant News repeats that same range.

Finding 5 — Prime cost: the real ceiling that decides whether your restaurant breathes

The National Restaurant Association measured the limited-service median at 65 cents per dollar in 2024. Operationally that reads: the sector median already lives at the ceiling of the healthy range. With the USDA ERS forecast of +9.4% wholesale beef for 2026, a steakhouse sitting at 63% today crosses 65% without touching payroll, purely by leaving the menu alone. The Masterestaurant team runs that arithmetic before rewriting a single recipe. Take a full-service operation closing 2025 at 30% food cost, 33% payroll and 63% prime cost. Then the USDA ERS 2026 forecast arrives: +3.2% across all food, and if your mix leans on beef, +7.5% at retail with the US cattle herd at a 75-year low. Leave the menu untouched and that 30% becomes 31-and-change, prime cost brushes 65%, and the segment margin — 3% to 8% per WhippleWood CPAs — drifts dangerously close to zero on the low end.

Finding 6 — What happens if you do nothing through 2026?

Now add that food away from home rises +3.6% while grocery rises +2.8% (USDA ERS, June 2026): your guest compares and punishes every ticket increase.

That 0.8-point spread is the trap. Your cost runs faster than willingness to pay, and the gap only closes from the inside. ReFED documents US$7 of future benefit for every US$1 invested in restaurant waste prevention, a 600% ROI no supplier renegotiation will match. Hold that against what it costs to fight for one point of purchase price in a market where USDA ERS already forecasts +3.2% overall for 2026. Fighting purchase price is necessary and has a ceiling; attacking shrink is uncomfortable and has leverage. The operating contrast is brutal: average commercial rent for a Los Angeles restaurant runs about $53 per square foot per year according to Pepperlot (2025), a cost you cannot move once the lease is signed, while daily shrink does move with a scale, a receiving form and the decision to weigh protein before it enters the walk-in.

Finding 7 — Shrink is the variance with a documented return

One cost is dead, the other is alive. Start with the sequence, because inverting it is the mistake I see repeated most: theoretical first, variance second, selling price only after that. A fast casual with 4% to 10% margin (WhippleWood CPAs, 2025-2026) and prime cost under 60% has room to absorb half a point and protect volume; a full-service house at 3% margin and 64% prime cost has no such luxury and must cut the 20% of dishes contributing the least contribution margin before raising a single price. In Mexico, CANIRAC and INEGI counted more than 641,000 restaurants contributing 1% of GDP in 2024, a universe where almost nobody produces daily variance; that is your edge. This week: standardize your ten best sellers, load them into the point of sale, and pull your first variance on Monday. FOOD COST percentage: cost of inputs consumed divided by food sales for the same period.

Finding 8 — Operating definitions before the scorecard

Masterestaurant sets 32% per dish as the admissible MAXIMUM, not a target; payroll, rent and utilities never load onto the plate, they get paid from aggregate contribution margin. THEORETICAL COST: what the period SHOULD have cost, using standardized recipes against the dishes actually sold. Each recipe cost is multiplied by its units sold at the point of sale. FOOD COST VARIANCE: actual minus theoretical, in percentage points or in money. This is the metric that separates a purchasing problem from an operating problem, and almost nobody produces it daily. PRIME COST: COGS plus total labor cost divided by sales. Toast and Restaurant365 place the target between 55% and 65% of sales, with a healthy goal at or below 60%; Nation's Restaurant News publishes the same 55-65% range. CONTRIBUTION MARGIN per dish: menu price minus the dish's variable cost, in currency rather than percentage. A dish at 38% food cost can deliver more money per unit than one at 24%, which is exactly why menu engineering gets done in dollars.

Finding 9 — Operating definitions before the scorecard — in practice

BREAK-EVEN: the sales level that covers fixed plus variable costs. Rent, insurance and administrative payroll belong here, and in Diego F. Parra's analysis they never get allocated into recipe cost. EBITDA: operating result before interest, taxes, depreciation and amortization. It is the number a buyer or partner looks at, and the first to degrade once food cost variance turns chronic. CAPEX versus OPEX in an automated kitchen: a connected scale, a walk-in sensor or an inventory system license book differently, and confusing them inflates the food cost of a month that actually bought an asset.

POINT BY POINT

Benchmark: what each source says and where they disagree

PRIME COST TARGET

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

Toast and Restaurant365 publish 55-65% of sales, with a healthy goal at or below 60%

B · MASTERESTAURANT The National Restaurant Association measured 65 cents per dollar as the real limited-service MEDIAN in 2024 (Data Abstract 2025)

Verdict: The real median sits flush against the ceiling of the recommended target. An operator celebrating 64% is not fine: he occupies the worst quartile of acceptable, with zero cushion for the +7.5% beef move USDA ERS projects for 2026.

EXPECTED NET MARGIN RANGE

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

WhippleWood CPAs 2026 gives 3%-8% in full service and 5%-12% in quick service

B · MASTERESTAURANT Nation's Restaurant News and Toast agree that 55-65% prime cost is the lever deciding where you land inside that range

Verdict: Both sources describe one mechanism from opposite ends of the P&L. With the full-service range so narrow, each point of food cost variance converts almost one-for-one into lost profit.

INPUT PRICE PRESSURE

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

USDA ERS projects +3.2% across all food in 2026, close to the 3.5% annual historical average for eating out

B · MASTERESTAURANT Inside that average live +7.5% beef, +5.7% coffee and beverages, and the egg precedent of +8.5% in 2024 and +21.9% in 2025

Verdict: Planning on the aggregate is 2026's most expensive mistake. A 3.2% average soothes a steakhouse that actually faces 7.5%, which is why input-family breakouts outrank the headline index.

RETURN ON ATTACKING SHRINK

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

ReFED documents US$7 of future benefit per US$1 invested in waste prevention, a 600% ROI

B · MASTERESTAURANT None of the financial benchmark sources (NRA, Toast, WhippleWood) carries waste as a line separate from COGS

Verdict: That gap explains why shrink survives for years: buried inside COGS, no standard benchmark exposes it. Measure it yourself, separately, or keep paying for it unseen.

COSTS THAT ARE NOT THE PLATE

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

Rent near US$53 per square foot annually in Los Angeles (Pepperlot 2025) and roughly US$1,359 a year in workers' compensation (MoneyGeek 2025)

B · MASTERESTAURANT Masterestaurant

recipe costing excludes payroll, rent and utilities and routes them to break-even

Verdict: Allocating fixed cost to the plate invents a false food cost and drives price increases in the wrong places. The rule is hard and admits no nuance: only what gets consumed with the dish belongs to the dish.

GEOGRAPHIC REACH OF THE BENCHMARKS

A · BEFORE · FOOD COST MEASURED AT MONTH-END CLOSE

USDA ERS, the NRA, Toast and WhippleWood measure the U.S. market

B · MASTERESTAURANT CANIRAC and

INEGI (2024) document more than 641,000 restaurants in Mexico, contributing 1% of GDP

Verdict: Prime cost ranges travel reasonably across markets because they describe structure, not currency; absolute rent and wage levels do NOT travel. Use the ranges, recompute the absolutes from your own invoices.

SIDE-BY-SIDE COMPARISON

Sources and scope of this synthesis METHODOLOGY

- ✕ USDA Economic Research Service, Food Price Outlook (June 2026 plus 2024-2025 series): consumer price forecasts by food family and the historical average for food away from home.
- ✕ National Restaurant Association, Restaurant Operations Data Abstract 2025 with 2024 data: median prime cost by service segment.
- ✕ Toast and Restaurant365: target prime cost as a share of sales, the industry rule most U.S. operators run on.
- ✕ WhippleWood CPAs, Restaurant Financial Benchmarks 2026: net profit margin ranges by segment.
- ✕ ReFED: return on food waste prevention across restaurants and foodservice.
- ✕ Bellwether Coffee (2025), Pepperlot (2025), MoneyGeek (2025) and CANIRAC/INEGI (2024): commodity pricing, commercial rent, insurance and the size of Mexico's restaurant base.
- ✕ Time window: data published between 2024 and June 2026. Inclusion criterion: only organizations that publish methodology and series, discarding aggregators with no primary source.
- ✕ Contrast criterion: where two sources cover the same metric, the full range gets reported instead of the friendlier figure.

Limitations worth stating MASTERESTAURANT

- ✓ Geographic coverage skews to the United States. USDA ERS, the NRA, Toast and WhippleWood measure a market whose labor and purchasing structure differs from Latin America; the only regional datapoint here is CANIRAC/INEGI on Mexico's restaurant base.
- ✓ Real temporal lag. The NRA prime cost median covers 2024 and published in 2025; the USDA ERS forecast dates to June 2026 and gets revised monthly, so the beef figure may move before year-end.
- ✓ This is a synthesis of public data with a consultant's reading, not primary research. There is no proprietary sample, no survey, no audit behind these percentages: every number belongs to the cited organization.

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Prime cost, limited service (2024 median)	✕ 65 cents of every sales dollar (National Restaurant Association, Restaurant Operations Data Abstract 2025, 2024 data), with no split between food and labor	✓ Those same 65 cents (NRA 2025) split into COGS and labor against the 55-65% of sales target Toast publishes
Expected profit margin by segment	✕ Full service 3%-8% (WhippleWood CPAs, Restaurant Financial Benchmarks 2026) with no view of which units in the group hit it	✓ Full service 3%-8%, fast casual 4%-10%, quick service 5%-12% (WhippleWood CPAs 2026) applied unit by unit
Food waste and its return	✕ Invisible shrink, discovered at the quarterly inventory once the money already left in the dumpster	✓ US$7 in future benefit per US$1 invested in waste prevention, a 600% ROI documented by ReFED
Volatility in a single commodity	✕ Eggs climb +8.5% in 2024 and +21.9% in 2025 (USDA ERS) and the menu stays untouched until the accountant calls	✓ Arabica coffee hits US$4.41 per pound in February 2025, an all-time high (Bellwether Coffee), and menu engineering responds that week
Structural inflation of eating out	✕ Benchmarked against the 3.5% annual historical average (USDA ERS), assuming 2026 behaves the same	✓ Benchmarked against the +3.6% forecast for 2026 versus +2.8% at the grocery store (USDA ERS, June 2026), with ticket adjusted on evidence
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THE NUMBERS THAT MATTER

The 2026 scorecard, figure by figure with its source

65¢
of every sales dollar went to prime cost in limited service (2024 median)

7.5%
rise in U.S. consumer beef prices during 2026, with the cattle herd at a 75-year low

3.2%
forecast increase across all U.S. food during 2026

7x
dollars of future benefit per dollar invested in waste prevention (600% ROI)

4.41USD
per pound of arabica coffee in February 2025, an all-time high

8%
ceiling on full-service net margin; fast casual reaches 10% and quick service 12%

VISUALIZATION

The numbers, visualized

of every sales dollar went to prime cost in limited service (2024 median)

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7.5%

forecast increase across all U.S. food during 2026

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4.41USD

ceiling on full-service net margin; fast casual reaches 10% and quick service 12%

8%

Sources: National Restaurant Association — Restaurant Operations Data Abstract 2025 · USDA ERS — Food Price Outlook 2026 · ReFED — Restaurants and Foodservice · Bellwether Coffee — The Great Coffee Price Surge 2025 · WhippleWood CPAs — Restaurant Financial Benchmarks 2026

Chart by masterestaurant.com

REAL CASE

“We walked in with 34.1% actual food cost and a firm conviction from the owner: the supplier was the problem. We standardized 62 recipes, connected point-of-sale volume to recipe costing, and the system began publishing theoretical cost every morning. Theoretical came back at 29.4%. Those 4.7 points of variance were three measurable things: overportioning on two beef dishes, unlogged walk-in shrink, and comps nobody was authorizing. Four months later actual closed at 30.2% without changing a single supplier and without touching menu prices. The buying was fine; what failed was control between the recipe and the plate leaving the pass.”

— Diego F. Parra, founder of Masterestaurant, on a cost intervention across a three-unit full-service group

HOW TO APPLY IT IN YOUR RESTAURANT

How to place yourself: three scenarios and the healthy range for each

1. **Single full-service unit: fight for the 3%-8% range with theoretical cost in hand**
WhippleWood CPAs (Restaurant Financial Benchmarks 2026) places full-service net margin between 3% and 8%, the tightest band of the three segments. Inside that band, two points of food cost variance eat half your profit. Start by standardizing the ten best-selling recipes, not the 80 on the menu, and publish daily theoretical cost against actual consumption. When the USDA ERS forecast of +7.5% beef for 2026 lands on you, you will know whether the hit came from price or from portion. Automation here is cheap: one connected scale and a live recipe cost beat any dashboard.

2. **Three to ten units: consolidated prime cost lies, so split it**
The limited-service median published by the National Restaurant Association (Data Abstract 2025, 2024 data) was 65 cents of prime cost per sales dollar, right at the upper edge of the 55-65% range Toast and Nation's Restaurant News recommend. Across three to ten units that average hides dispersion: one unit at 58% and another at 71% produce a presentable mean and a real hemorrhage. Measure food cost variance per unit and per shift, never consolidated. An AI dashboard earns its keep precisely here, ranking units by variance and telling you which kitchen to walk into on Tuesday instead of handing you a group average.

3. **Multi-unit: turn variance into incentive and incentive into EBITDA**
With ReFED documenting US$7 of future benefit per US$1 invested in waste prevention, a 600% ROI, the economic case for shrink discipline is settled. In multi-unit operations the challenge is not knowing it, it is getting 40 kitchens to execute it. Tie the chef's bonus to theoretical-versus-actual variance rather than absolute food cost: the absolute depends on prices he does not control, the variance depends on what he does. Gamified boards that publish a weekly variance ranking work because they make visible what only the accountant used to see, two months late.

4. **Any size: separate what belongs to the plate from what belongs to break-even**
Commercial rent near US$53 per square foot annually in Los Angeles (Pepperlot 2025) and roughly US$1,359 a year in workers' compensation premium (MoneyGeek 2025) are real, serious costs, yet neither belongs in recipe costing. Loading them onto the plate produces an inflated food cost that pushes indiscriminate price increases and destroys the currency contribution margin of the dishes carrying your cash. The Masterestaurant method holds 32% food cost per dish as a MAXIMUM that is never recommended, and sends payroll, rent and utilities to break-even, where they get compared against required sales rather than against a steak.

FAQ

Questions that arrive every week about this analysis

What food cost percentage is normal for a restaurant in 2026?

There is no universal normal: it depends on segment. Masterestaurant sets 32% per dish as a MAXIMUM that is never recommended, and what governs is prime cost, which Toast and Nation's Restaurant News place between 55% and 65% of sales with a healthy goal at 60%. The National Restaurant Association reported 65 cents of prime cost per dollar in limited service during 2024.

What is the difference between theoretical and actual cost, and which should I watch?

Theoretical cost is what the period should have cost per standardized recipe against dishes sold; actual is what genuinely left inventory. Watch both, but decide on the subtraction: that food cost variance tells you whether the problem is purchasing or operations. Without theoretical, actual food cost merely confirms an accident that already happened.

Does 2026 food cost rise enough to justify raising menu prices?

USDA ERS forecasts +3.2% across all food, +7.5% for beef and +5.7% for coffee and nonalcoholic beverages in 2026, while food away from home climbs +3.6% versus +2.8% at the grocery store. Raise price only on dishes where the expensive input truly weighs, using menu engineering and contribution margin in currency, never with a flat percentage across the whole menu.

Does AI automation lower food cost or merely report it?

It reports on time, which is what makes lowering it possible. The value lies in publishing theoretical against actual daily rather than quarterly, isolating the dish that drifts and closing the loop with the kitchen. ReFED documents US$7 of future benefit per US$1 invested in waste prevention, a 600% ROI, and that discipline is impossible to sustain manually across several units.

DATA & SOURCES

Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Facturación anual de la hostelería en el Reino Unido	**£144.000 millones al año (2024)**	UKHospitality / House of Commons Library 2024
Número de negocios de hostelería en el Reino Unido	**176.685 negocios (marzo 2025)**	House of Commons Library 2026

Metric	Benchmark 2026	Source
Ventas de servicios de comida y bebida en Canadá	**CAD 96.500 millones en 2024 (+4,0% vs 2023)**	Statistics Canada 2024
Participación por segmento en ventas de foodservice (Canadá)	**servicio limitado 46,4% / servicio completo 43,1% (2024)**	Statistics Canada 2024
Peso de la industria restaurantera en los negocios de México	**12,2% de las unidades económicas del país**	INEGI–CANIRAC 2024
Pronóstico de precios de carne de res (EE. UU.)	**+7,5% en 2026 (hato ganadero en mínimo de 75 años)**	USDA ERS (Food Price Outlook) 2026

Author: Diego F. Parra · **Publisher:** MASTERESTAURANT®

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