**KANSAS STATE**
Department of Agricultural Economics
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# MDM: Meat Demand Monitor

The MDM tracks U.S. consumer preferences, views, and demand for meat with separate analysis for retail and food service channels. MDM is a monthly online survey with a sample of over 2,000 respondents reflecting the national population.

## Willingness to Pay & Projected Market Share

| *RETAIL* | Ribeye Steak | Ground Beef | Pork Chop | Bacon | Chicken Breast | Plant-Based Patty | Shrimp | Beans and Rice | Something Else |
|---|---|---|---|---|---|---|---|---|---|
| Jan-26 WTP ($/lb) | $18.95 | $10.09 | $8.08 | $6.71 | $9.39 | $8.25 | $9.81 | $3.63 | |
| Market Share | 9% | 27% | 13% | 8% | 25% | 2% | 4% | 6% | 5% |
| Feb-26 WTP ($/lb) | $16.68 | $8.40 | $6.62 | $5.91 | $7.99 | $8.63 | $9.54 | $2.82 | |
| Market Share | 6% | 27% | 12% | 8% | 27% | 2% | 4% | 7% | 7% |

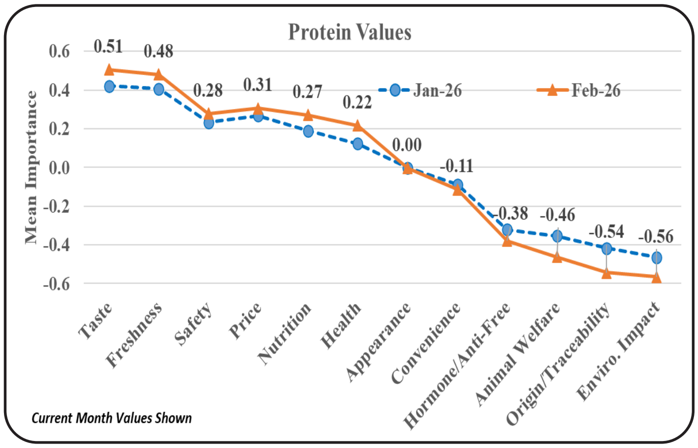
| FOOD SERVICE | Ribeye Steak | Beef Hamburger | Pork Chop | Baby Back Ribs | Chicken Breast | Plant-Based Patty | Shrimp | Salmon | Something Else |
|---|---|---|---|---|---|---|---|---|---|
| Jan-26 WTP ($/meal) | $30.51 | $24.52 | $17.14 | $20.04 | $20.43 | $12.81 | $19.48 | $21.77 | |
| Market Share | 17% | 29% | 5% | 9% | 13% | 3% | 11% | 9% | 4% |
| Feb-26 WTP ($/meal) | $25.01 | $18.84 | $14.81 | $17.43 | $17.61 | $12.39 | $17.02 | $18.49 | |
| Market Share | 13% | 26% | 4% | 9% | 16% | 4% | 13% | 8% | 6% |

Willingness-to-pay (WTP) decreased on seven evaluated Retail products and all eight evaluated Food Service dinner meals in February compared to January.

The combined beef and pork projected market shares for February are 33% and 20%, respectively at the grocery store and 39% and 13% at the restaurant.

## Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 51% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor (61% top-4, 29% middle-4, and 10% bottom-4 factor).

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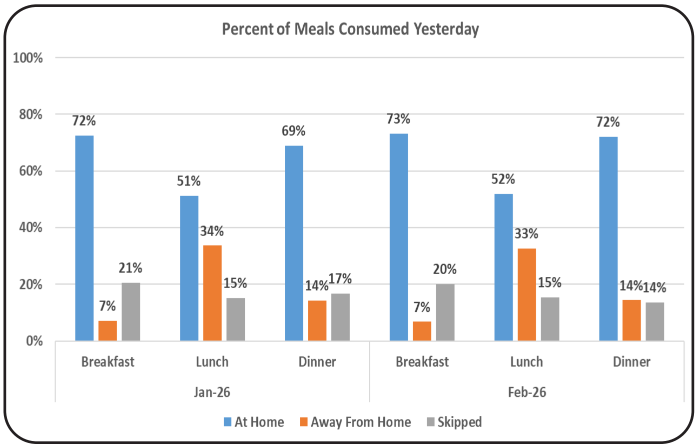
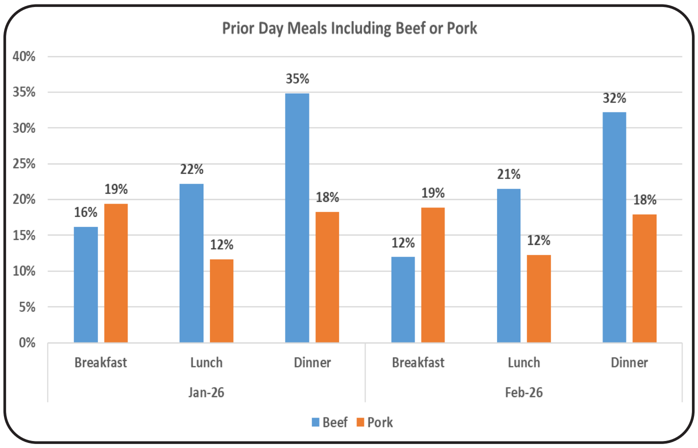
# Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 52%, and 72% consumed breakfast, lunch, and dinner at home in February with all three meals at home increasing in prevalence from January. In February, 12%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner.  Pork was included in 19%, 12%, and 18% of these meals.

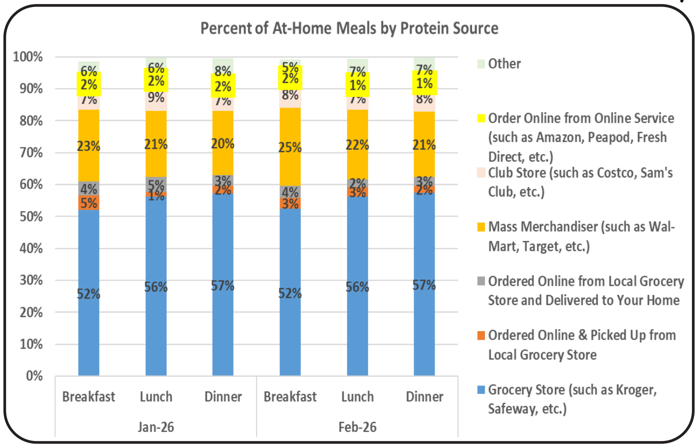


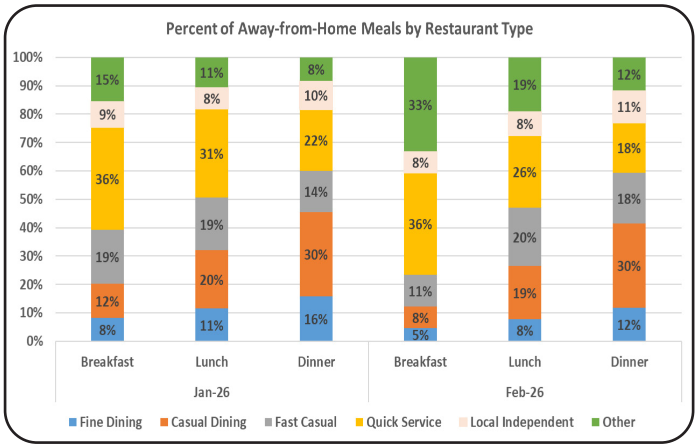




# Prior Day Meals: At-Home Protein Source & Restaurant Type

In February, the protein source for at-home meals was predominantly Grocery Stores.  Combined, Club Stores and Mass Merchandisers were source for 33%, 29%, and 29% of breakfast, lunch, and dinner meals.

Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch.  Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 55%, 65%, and 65% of breakfast, lunch, and dinner meals in February.

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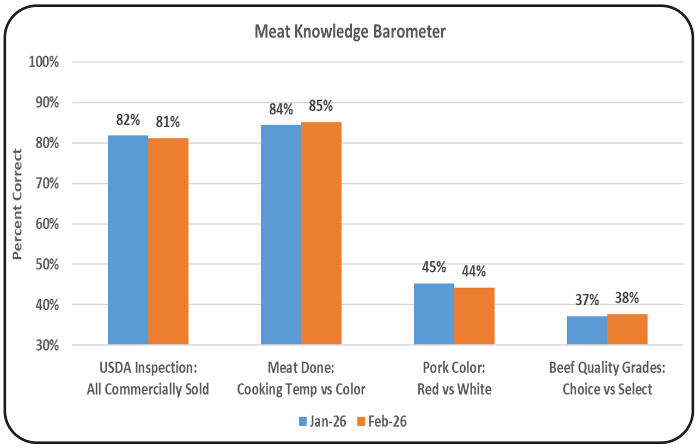
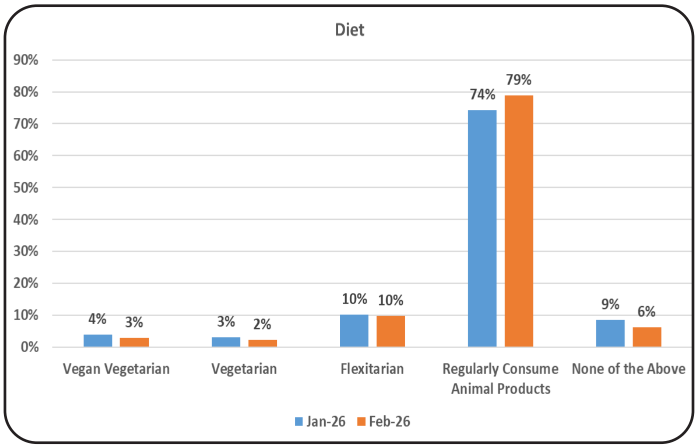
Additional MDM Project details are available at: https://www.agmanager.info/

## Meat Knowledge & Personal Diet

Consistent with past months, the majority of respondents correctly note USDA inspects all meat sold commercially and cooking temperature is more accurate than color in assessing if meat is "done." Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

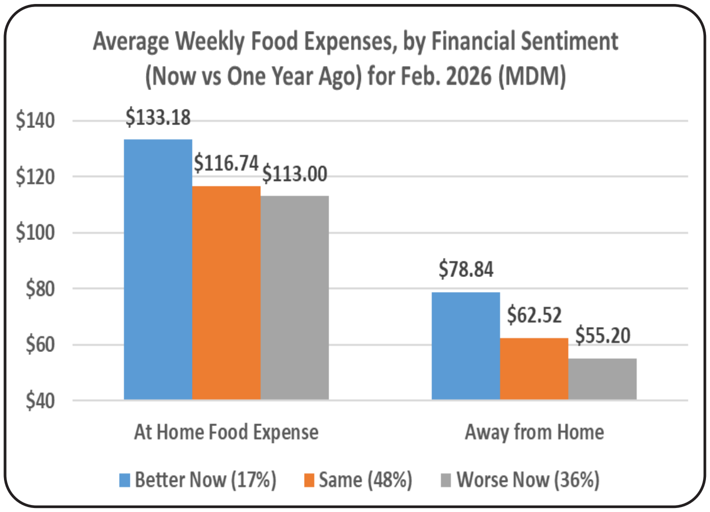
In February, 79% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 5% indicate they are either Vegan Vegetarian or Vegetarian.

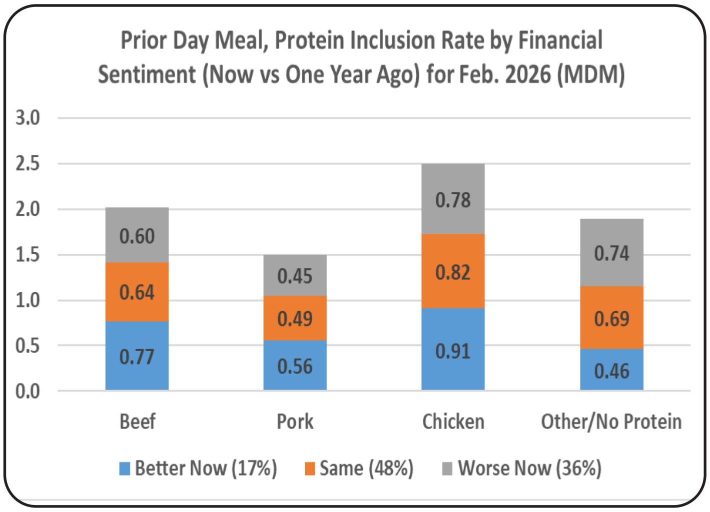



## Ad Hoc Questioning

In February 17% indicate their household finances are better than one year earlier while 48% indicate same and 36% indicate worse conditions. As shown repeatedly for months now, this aligns with broader "K-shaped economy" and "affordability" discussions as food expenditures, particularly away-from-home, follow directly from household financial changes. Further, this regularly corresponds with notable differences in prior day meat consumption frequency as meat consumption and demand (not the same) grow with income & wealth.





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Additional MDM Project details including survey questions, past report releases, and a description of methods are available online at: https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data

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