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
Dec-25 WTP ($/lb)	$18.51	$10.23	$8.08	$6.81	$9.61	$8.19	$9.93	$3.57	
Market Share	8%	28%	13%	8%	27%	2%	4%	6%	5%
Jan-26 WTP ($/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%

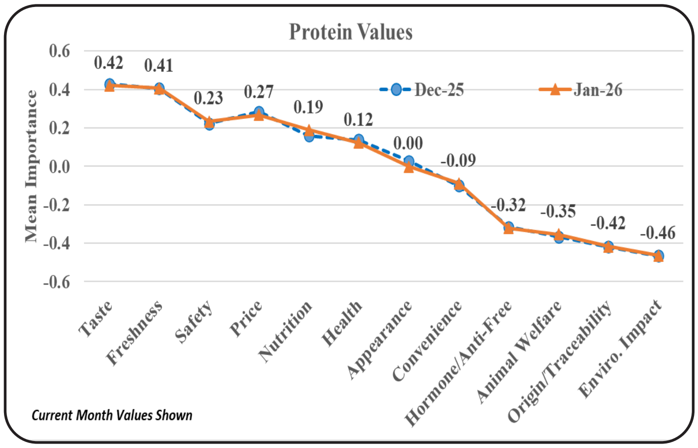
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Dec-25 WTP ($/meal)	$27.54	$21.07	$16.04	$18.02	$17.88	$11.53	$17.53	$18.26	
Market Share	16%	27%	5%	9%	14%	3%	12%	7%	6%
Jan-26 WTP ($/meal)	$30.51	$24.52	$17.14	$20.04	$20.43	$12.81	$19.48	$21.77	
Market Share	17%	29%	5%	9%	13%	3%	11%	9%	4%

Willingness-to-pay (WTP) decreased on five evaluated Retail products and increased on all evaluated Food Service dinner meals in January compared to December.

The combined beef and pork projected market shares for January are 36% and 21%, respectively at the grocery store and 46% 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 27% more considering Price a top-4 factor (of 12 examined) than considering Price a bottom-4 purchasing factor (47% top-4, 32% middle-4, and 21% bottom-4 factor).



Meat Demand Monitor
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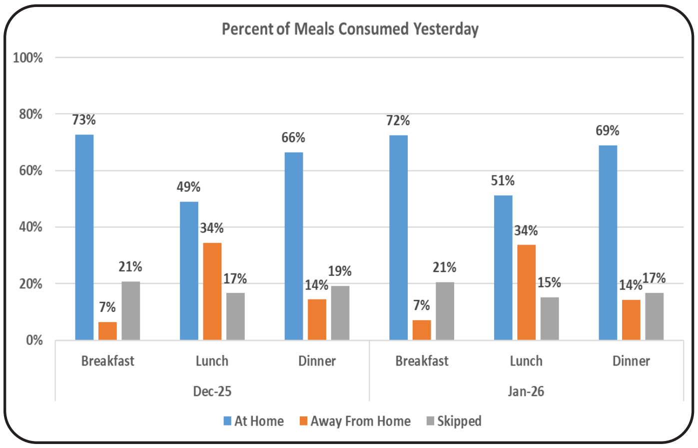
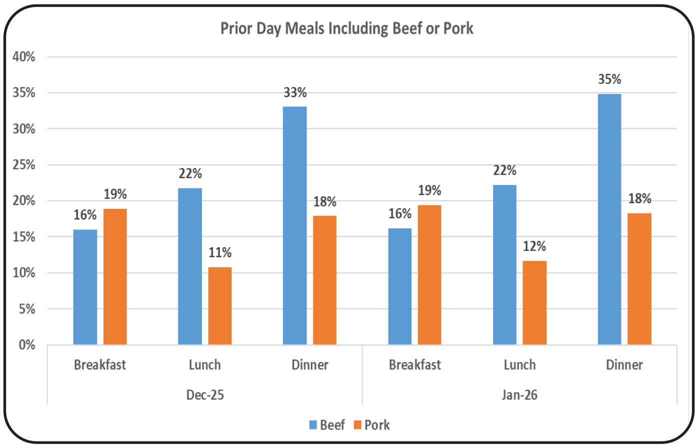
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 72%, 51%, and 69% consumed breakfast, lunch, and dinner at home in January with both lunch and dinner meals at home increasing in prevalence from December. In January, 16%, 22%, and 35% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 18% of these meals.

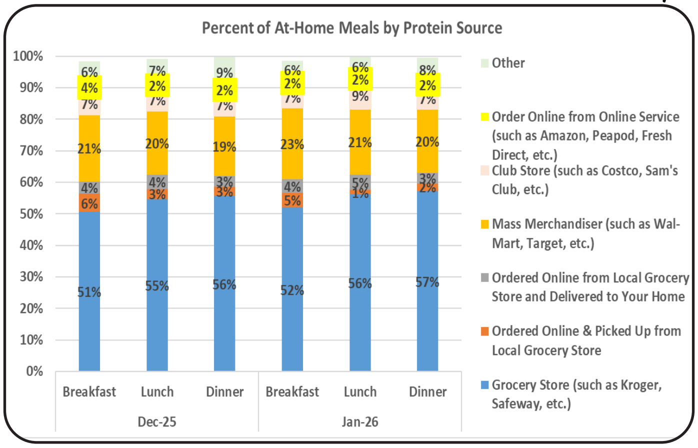


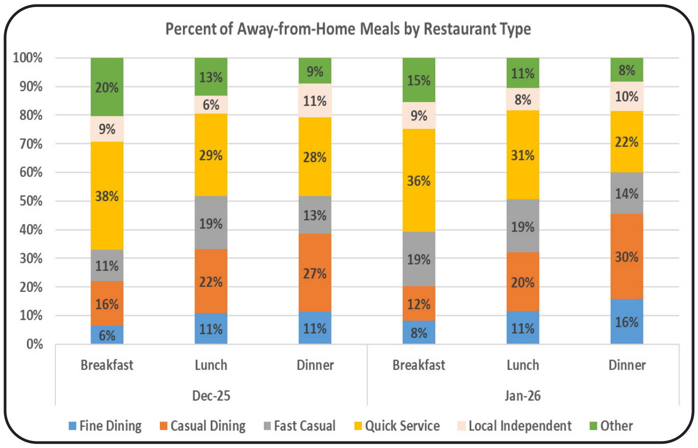


Prior Day Meals: At-Home Protein Source & Restaurant Type

In January, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 29%, 29%, and 27% 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 67%, 70%, and 66% of breakfast, lunch, and dinner meals in January.

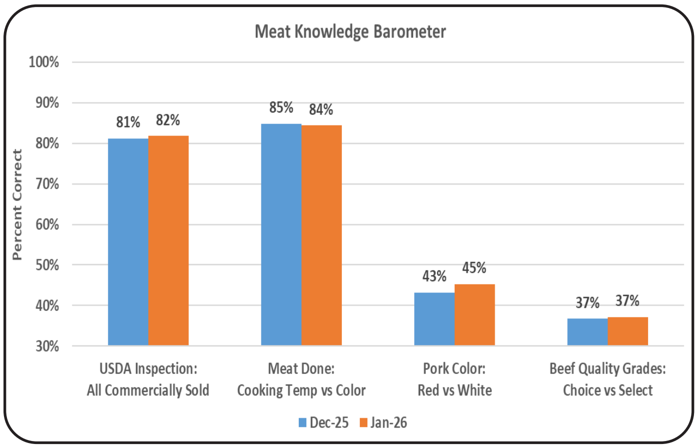


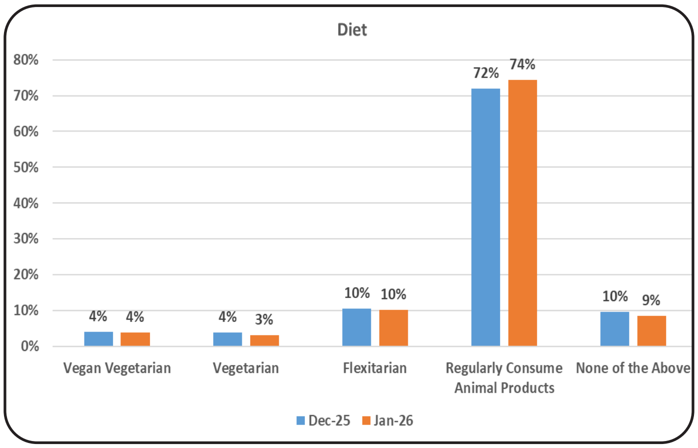


Meat Knowledge & Personal Diet

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 January, 74% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 7% indicate they are either Vegan Vegetarian or Vegetarian.

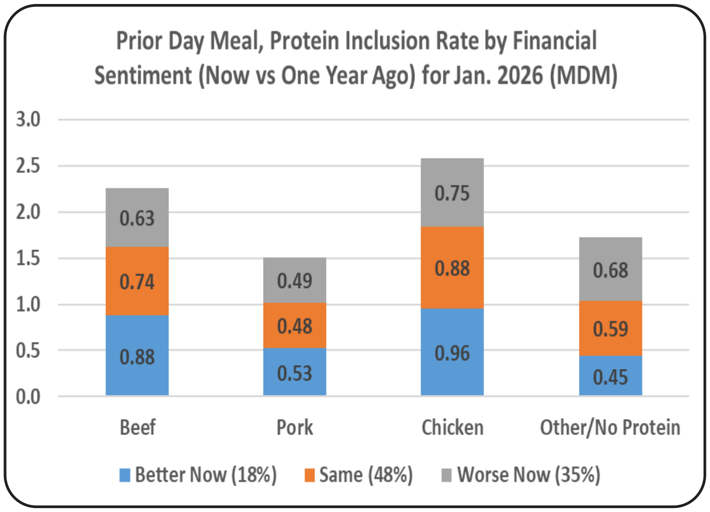


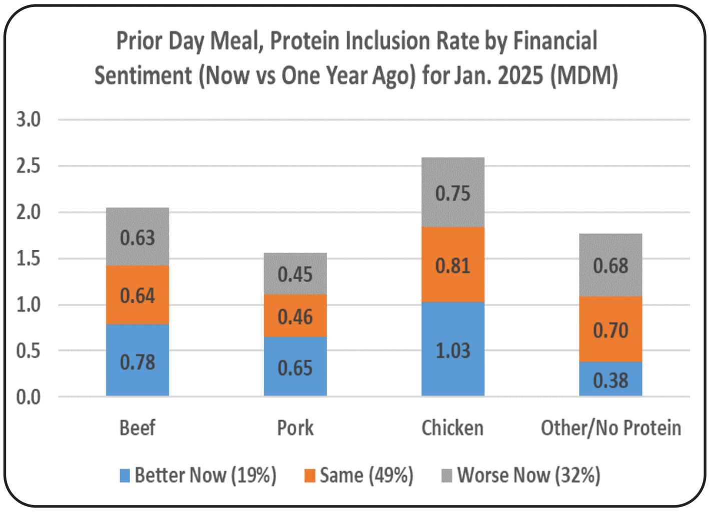


Ad Hoc Questioning

In January 18% indicate their household finances are better than one year earlier (vs 19% in Jan. 2025) while 48% indicate same and 35% indicate worse conditions. As shown repeatedly in 2025, this aligns with broader "K-shaped economy" and "affordability" discussions. This regularly corresponds with notable differences in prior day meat consumption frequency - simply stated, meat demand grows with income & wealth.

Ongoing desire for meat protein is revealed in noting increased consumption frequency (lower in only two of nine shown cases for beef, pork, and chicken) for all three sentiment groups in Jan. 2026 vs. Jan. 2025.





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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