

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

<i>RETAIL</i>	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
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%
Mar-26 WTP (\$/lb)	\$16.83	\$8.24	\$6.47	\$5.66	\$8.14	\$8.25	\$9.29	\$2.61	
Market Share	7%	26%	12%	7%	29%	2%	4%	6%	7%

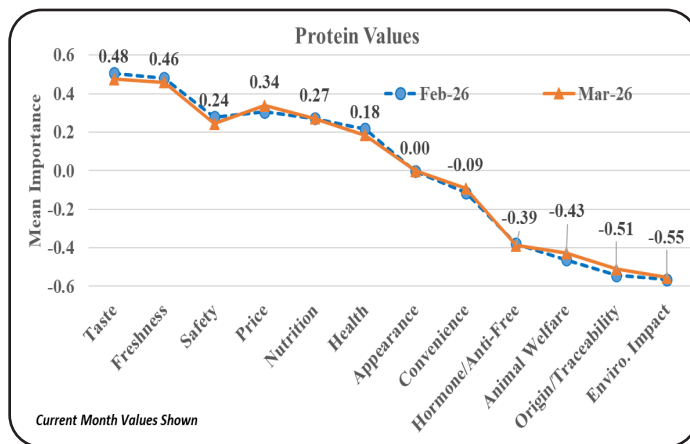
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Feb-26 WTP (\$/meal)	\$25.01	\$18.84	\$14.81	\$17.43	\$17.61	\$12.39	\$17.02	\$18.49	
Market Share	13%	26%	4%	9%	16%	4%	13%	8%	6%
Mar-26 WTP (\$/meal)	\$27.14	\$21.64	\$16.49	\$19.25	\$19.73	\$13.29	\$18.16	\$20.26	
Market Share	13%	28%	4%	10%	16%	3%	11%	9%	5%

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

The combined beef and pork projected market shares for March are 32% and 19%, respectively at the grocery store and 42% and 14% at the restaurant.

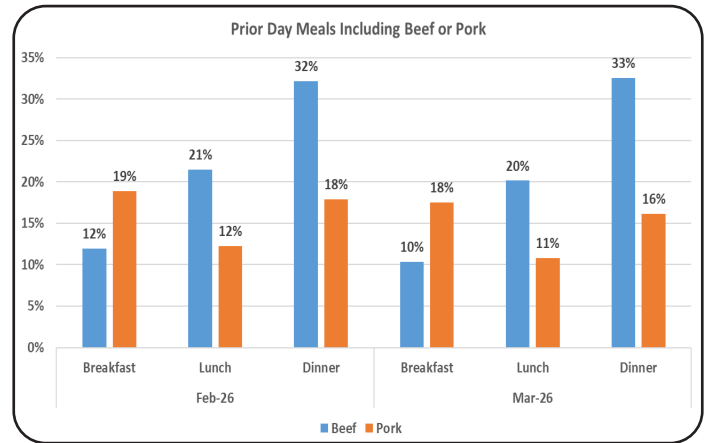
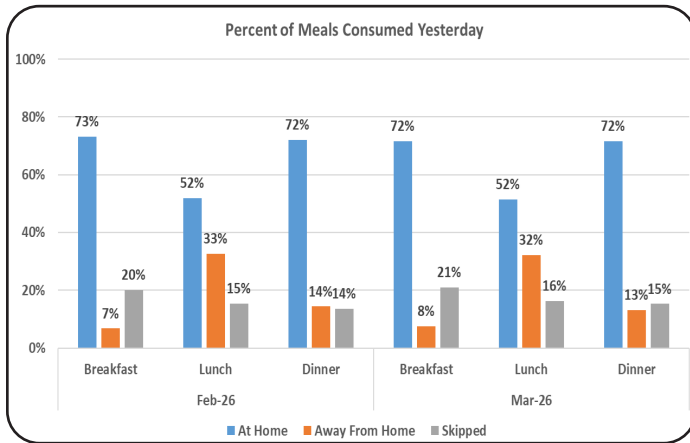
## Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 48% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor (55% top-4, 29% middle-4, and 8% bottom-4 factor).



## Prior Day Meals: Location & Protein Consumption Frequency

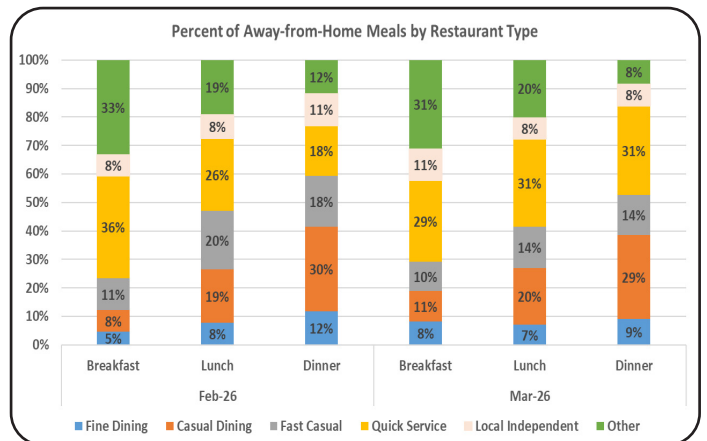
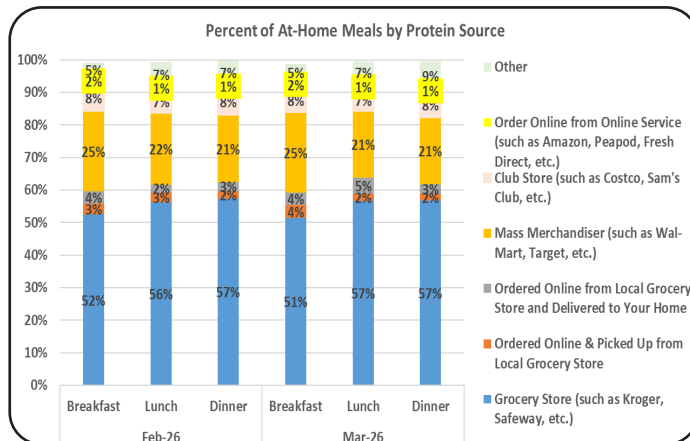
Respondents indicate 72%, 52%, and 72% consumed breakfast, lunch, and dinner at home in March. In March, 10%, 20%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 11%, and 16% of these meals.



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

In March, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 32%, 27%, and 28% of breakfast, lunch, and dinner meals.

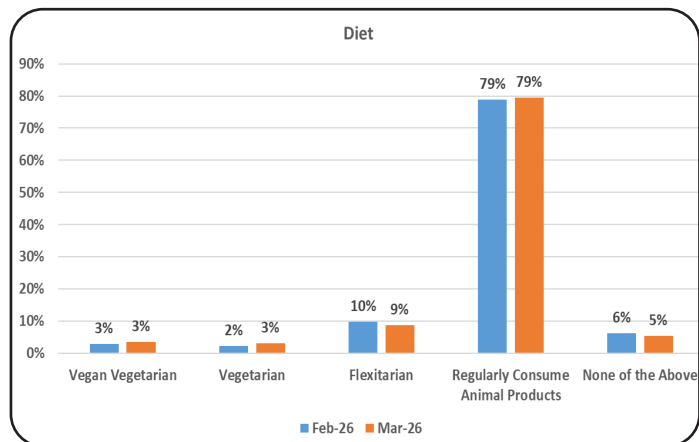
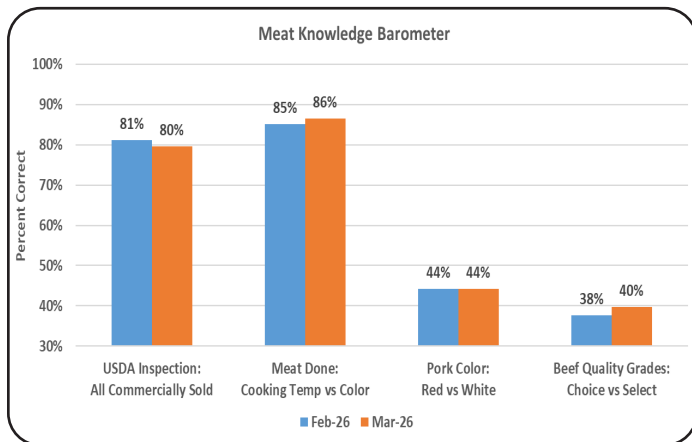
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast, lunch, and dinner. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 50%, 65%, and 75% of breakfast, lunch, and dinner meals in March.



## Meat Knowledge & Personal Diet

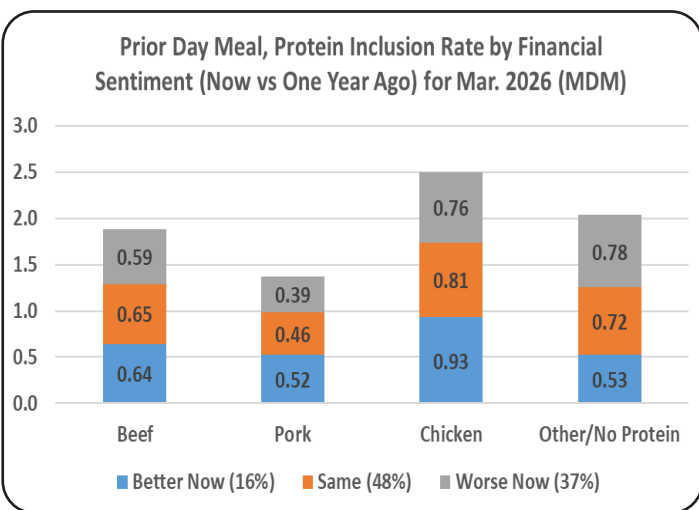
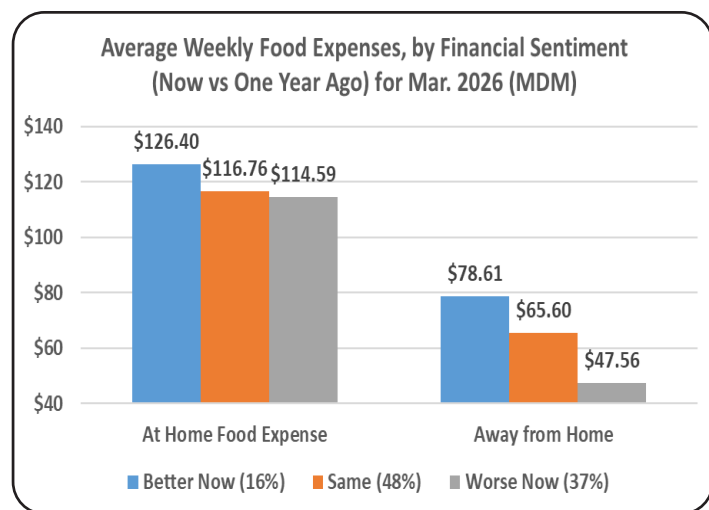
Consistent with past months, the majority of respondents correctly note USDA inspects all meat sold commercially and cooking temperature is more accurate than color in assessing if meat is “done.” Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

In March, 79% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 6% indicate they are either Vegan Vegetarian or Vegetarian.



## Ad Hoc Questioning

In March 16% indicate their household finances are better than one year earlier (vs. 17% in Feb.) while 48% indicate same and 37% 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.



For more information about this publication and others, visit [AgManager.info](http://AgManager.info).

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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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**Funded in part by  
the Beef Checkoff.**

