

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
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%
Apr-26 WTP (\$/lb)	\$17.96	\$9.32	\$7.55	\$6.31	\$9.27	\$8.11	\$9.24	\$3.65	
Market Share	8%	25%	13%	8%	28%	2%	4%	7%	6%

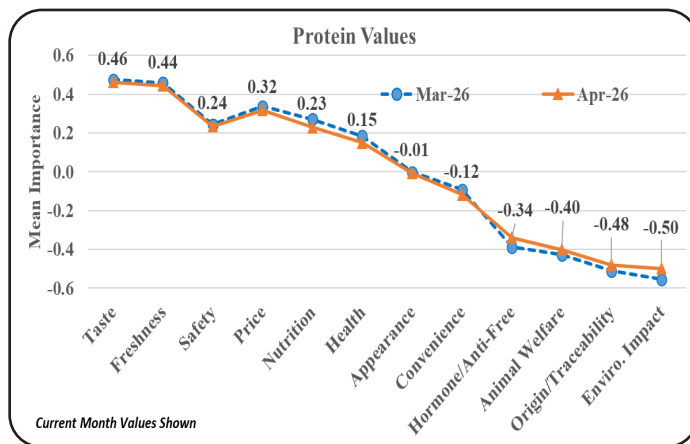
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-26 WTP (\$/meal)	\$27.14	\$21.64	\$16.49	\$19.25	\$19.73	\$13.29	\$18.16	\$20.26	
Market Share	13%	28%	4%	10%	16%	3%	11%	9%	5%
Apr-26 WTP (\$/meal)	\$26.85	\$21.25	\$16.54	\$18.98	\$18.94	\$13.04	\$18.67	\$19.79	
Market Share	13%	27%	5%	10%	15%	4%	13%	8%	5%

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

The combined beef and pork projected market shares for April are 33% and 20%, respectively at the grocery store and 41% and 14% at the restaurant.

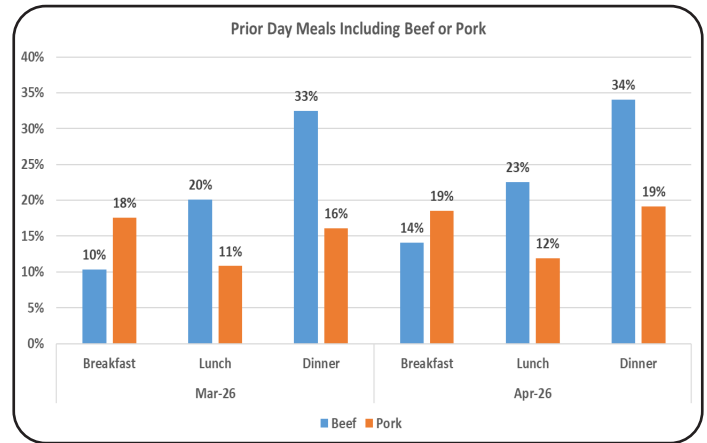
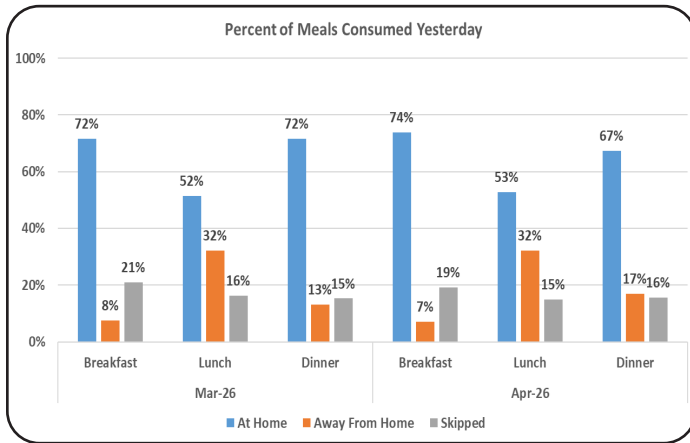
Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 46% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor (58% top-4, 30% middle-4, and 12% bottom-4 factor).



Prior Day Meals: Location & Protein Consumption Frequency

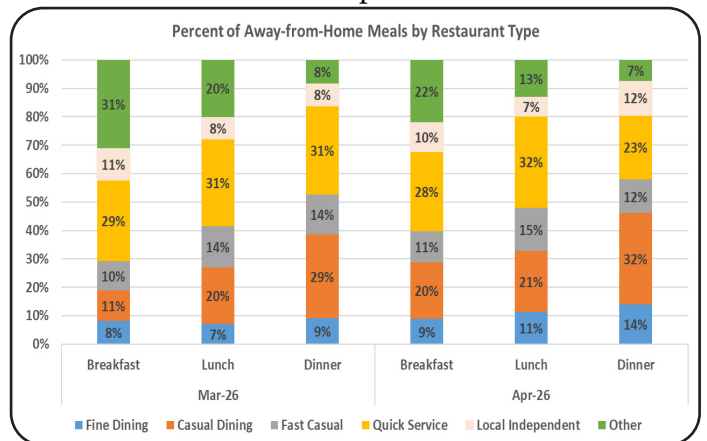
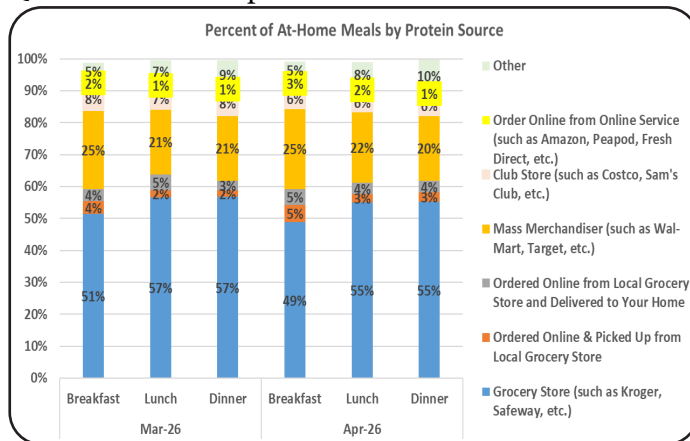
Respondents indicate 74%, 53%, and 67% consumed breakfast, lunch, and dinner at home in April with dinner meals being consumed less often at-home than in March. In April, 14%, 23%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 19% of these meals.



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

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

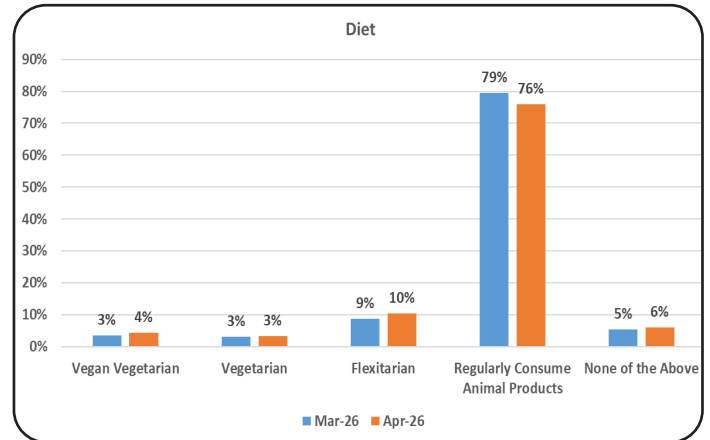
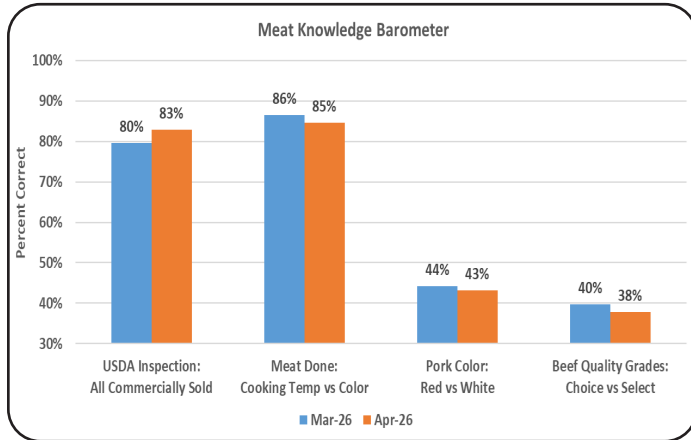
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch while Casual Dining leads for dinner meals. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 59%, 69%, and 67% of breakfast, lunch, and dinner meals in April.



Meat Knowledge & Personal Diet

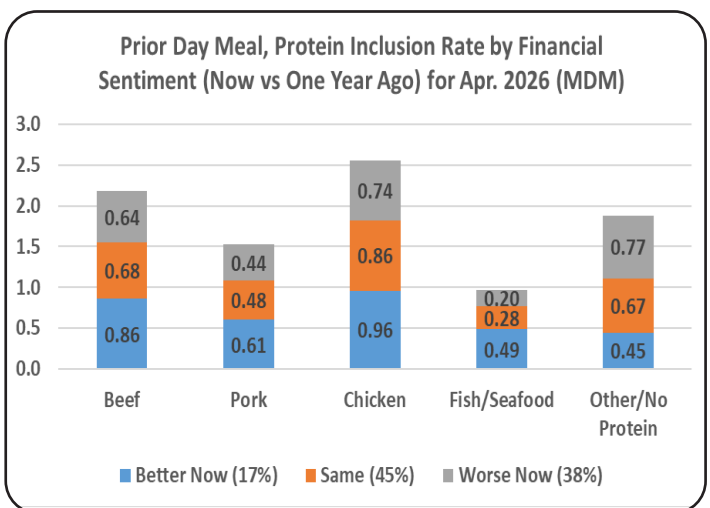
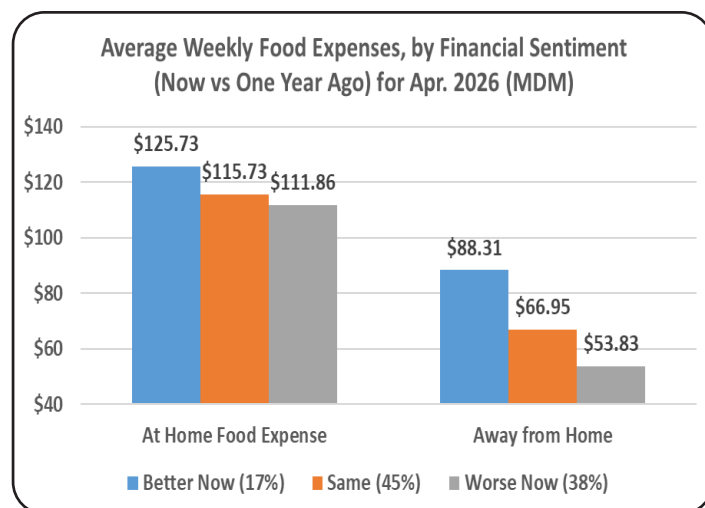
Consistent with past months, the majority of respondents correctly note USDA inspects all meat sold commercially and cooking temperature is more accurate than color in assessing if meat is “done.” Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

In April, 76% 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 April 17% indicate their household finances are better than one year earlier (vs. 16% in March) while 45% indicate same and 38% 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 (as well as fish/seafood) consumption frequency. Recall, both meat consumption and demand (not the same measures nor concepts!) 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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the Beef Checkoff.**

