

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
May-26 WTP (\$/lb)	\$17.93	\$9.24	\$7.12	\$6.17	\$9.06	\$8.05	\$9.72	\$3.55	
Market Share	8%	26%	12%	7%	28%	2%	4%	7%	6%
Jun-26 WTP (\$/lb)	\$19.26	\$10.71	\$8.52	\$6.88	\$9.90	\$7.18	\$9.56	\$4.05	
Market Share	10%	27%	13%	8%	25%	1%	4%	7%	5%

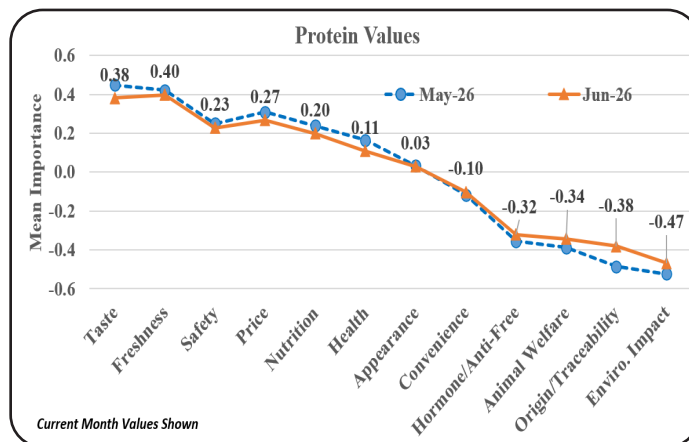
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
May-26 WTP (\$/meal)	\$27.84	\$21.50	\$16.35	\$18.40	\$18.81	\$12.68	\$17.59	\$19.43	
Market Share	16%	28%	5%	9%	15%	4%	11%	8%	5%
Jun-26 WTP (\$/meal)	\$30.52	\$24.29	\$18.74	\$21.52	\$21.09	\$13.30	\$19.95	\$21.32	
Market Share	17%	28%	5%	10%	14%	3%	11%	8%	4%

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

The combined beef and pork projected market shares (projections made at intermediate level of presented prices) for June are 37% and 21%, respectively at the grocery store and 44% and 16% at the restaurant.

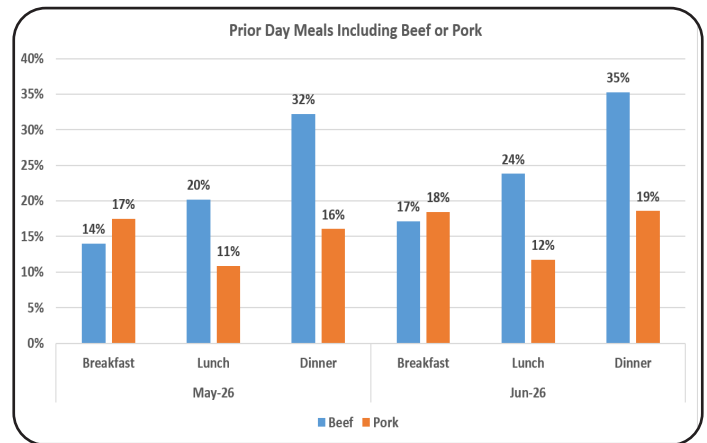
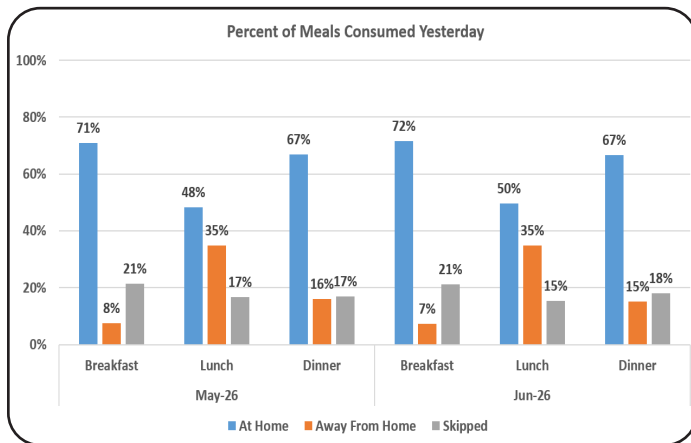
Protein Values

Freshness, Taste, 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 (48% top-4, 31% middle-4, and 21% bottom-4 factor).



Prior Day Meals: Location & Protein Consumption Frequency

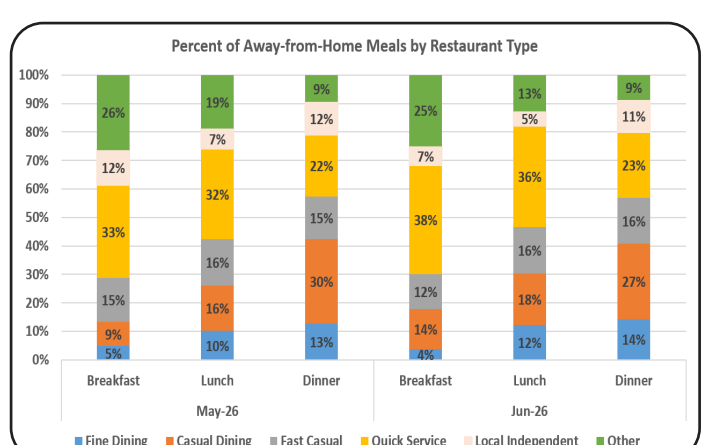
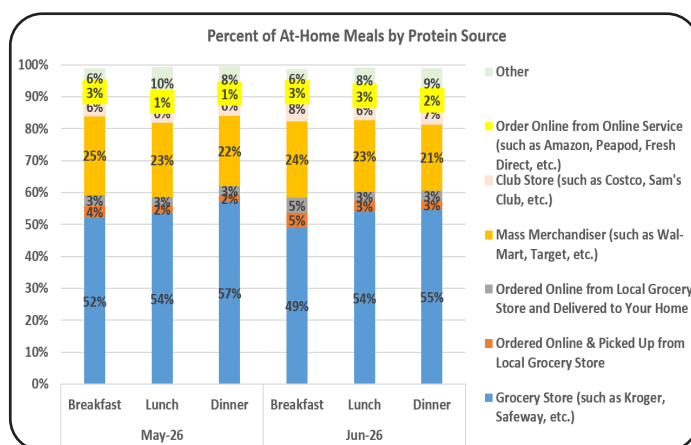
Respondents indicate 72%, 50%, and 67% consumed breakfast, lunch, and dinner at home in June with breakfast and lunch being consumed more often at-home than in May. In June, 17%, 24%, and 35% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 19% of these meals.



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

In June, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 32%, 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 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 64%, 70%, and 66% of breakfast, lunch, and dinner meals in June.



Meat Demand Monitor

Kansas State University Department of Agricultural Economics

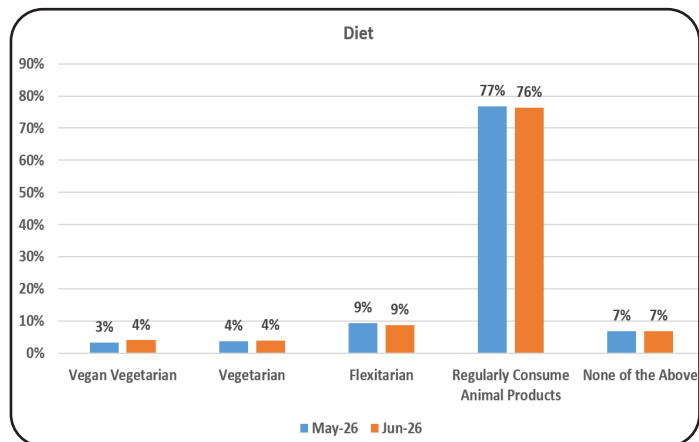
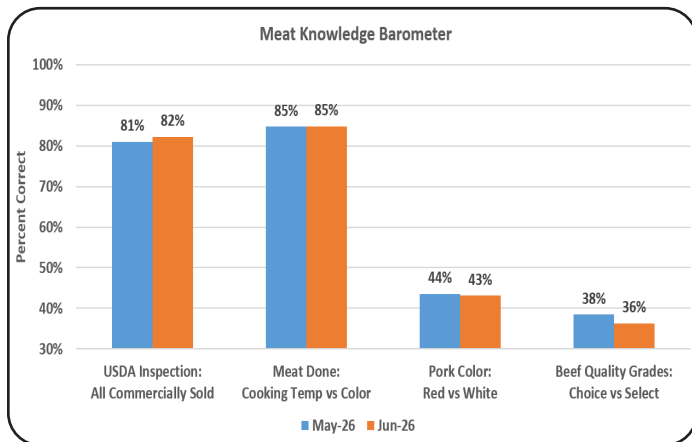
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Additional MDM Project details are available at: <https://www.agmanager.info/>

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.

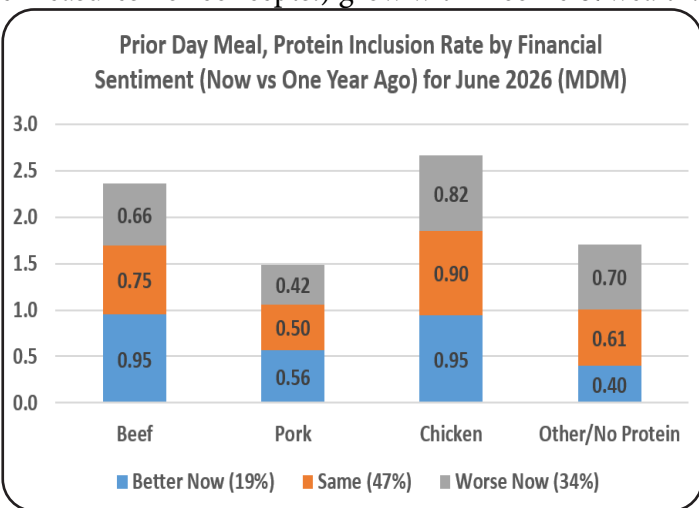
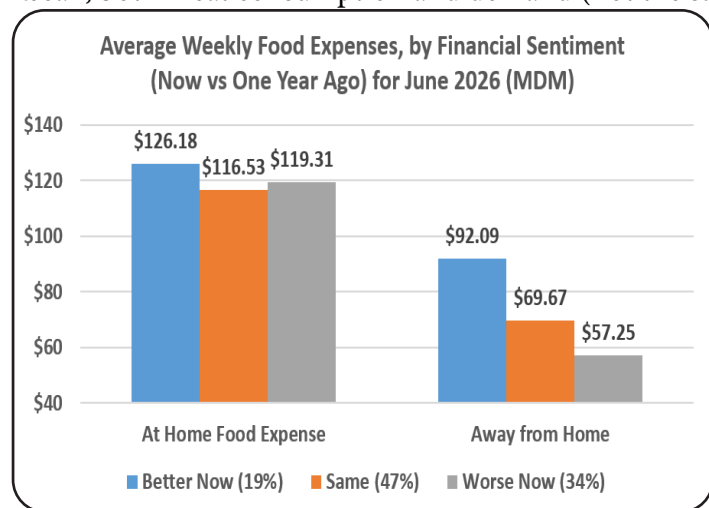
In June, 76% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

In June 19% indicate their household finances are better than one year earlier (vs. historic low of 15% in May) while 47% indicate same and 34% 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. The improved sentiment likely aligns with consumer demand (see WTP improvement) noted on page 1 above.

Further, this regularly corresponds with notable differences in prior day meat consumption frequency. Recall, both meat consumption and demand (not the same measures nor concepts!) grow with income & wealth.



For more information about this publication and others, visit 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>

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.



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

