

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
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%
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%

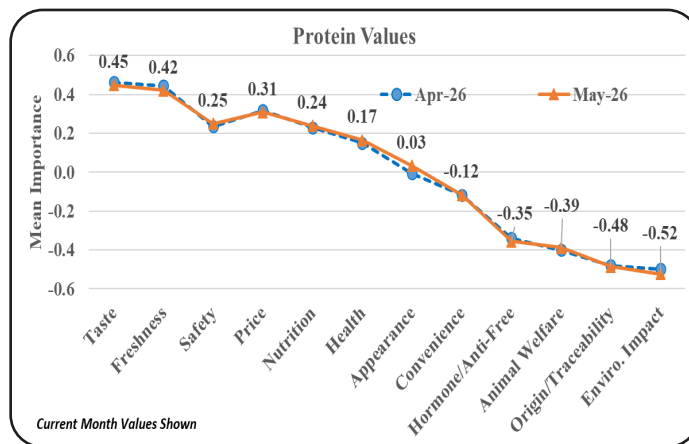
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Apr-26 WTP (\$/meal)	\$26.85	\$21.25	\$16.54	\$18.98	\$18.94	\$13.04	\$18.67	\$19.79	
Market Share	13%	27%	5%	10%	15%	4%	13%	8%	5%
May-26 WTP (\$/meal)	\$27.84	\$21.50	\$16.35	\$18.40	\$18.81	\$12.68	\$17.59	\$19.43	
Market Share	16%	28%	5%	9%	15%	4%	11%	8%	5%

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

The combined beef and pork projected market shares (projections made at intermediate level of presented prices) for May are 34% and 19%, respectively at the grocery store and 44% and 14% at the restaurant.

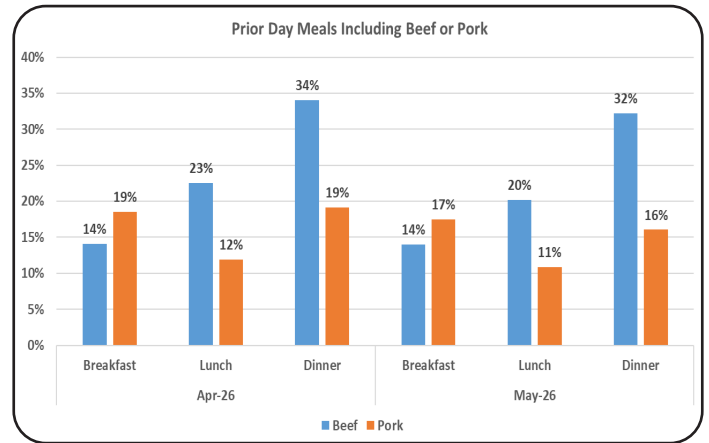
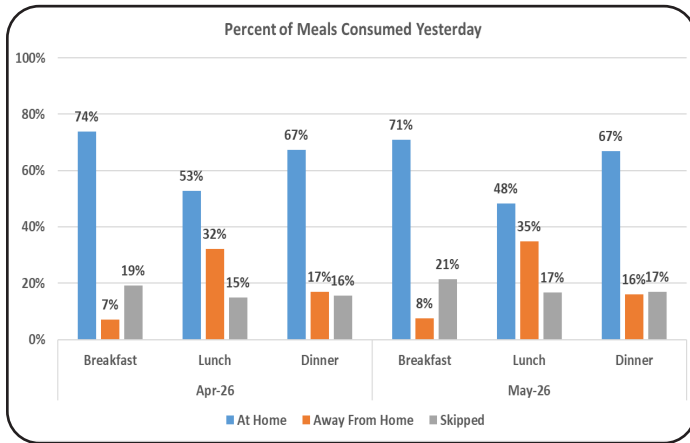
## Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 45% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor (58% top-4, 29% middle-4, and 13% bottom-4 factor).



## Prior Day Meals: Location & Protein Consumption Frequency

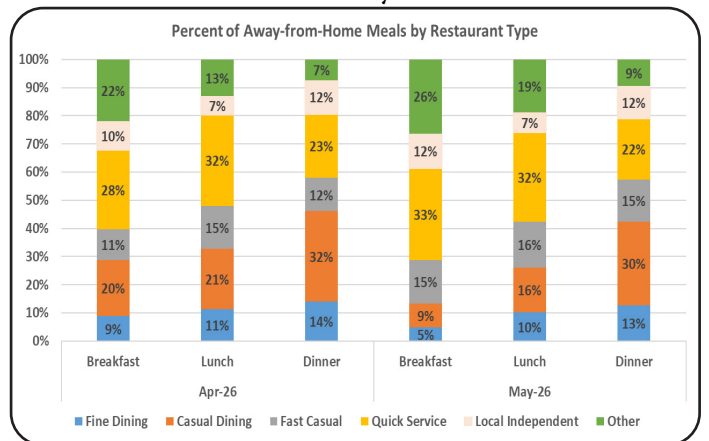
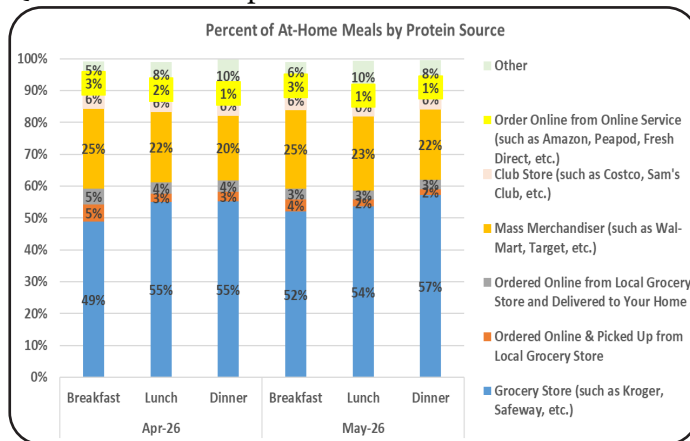
Respondents indicate 71%, 48%, and 67% consumed breakfast, lunch, and dinner at home in May with all three meals being consumed less often at-home than in April. In May, 14%, 20%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 11%, and 16% of these meals.



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

In May, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 31%, 29%, and 29% of breakfast, lunch, and dinner meals.

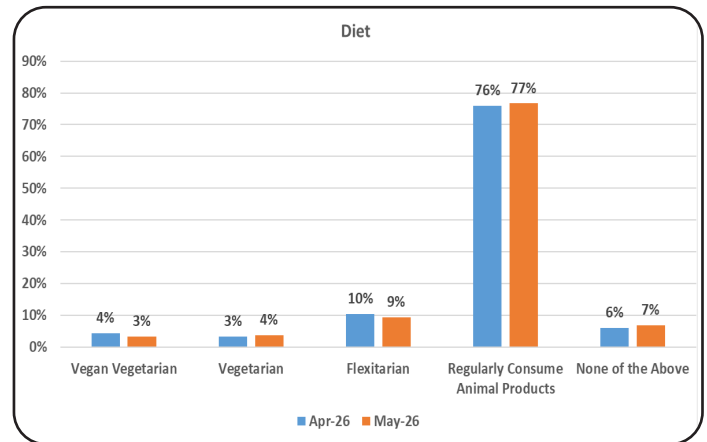
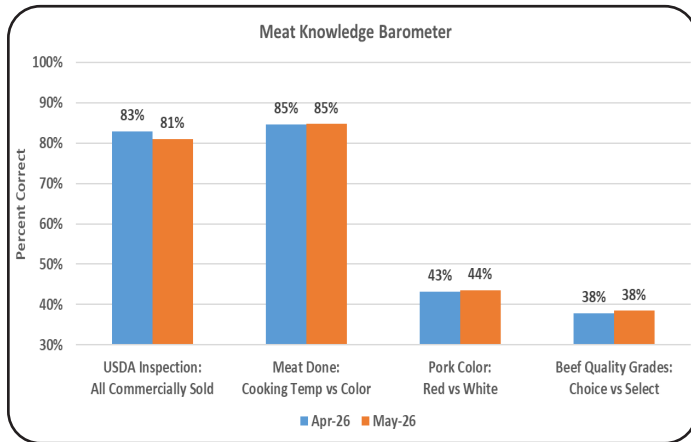
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch while Casual Dining leads for dinner meals. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 57%, 64%, and 66% of breakfast, lunch, and dinner meals in May.



## 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.

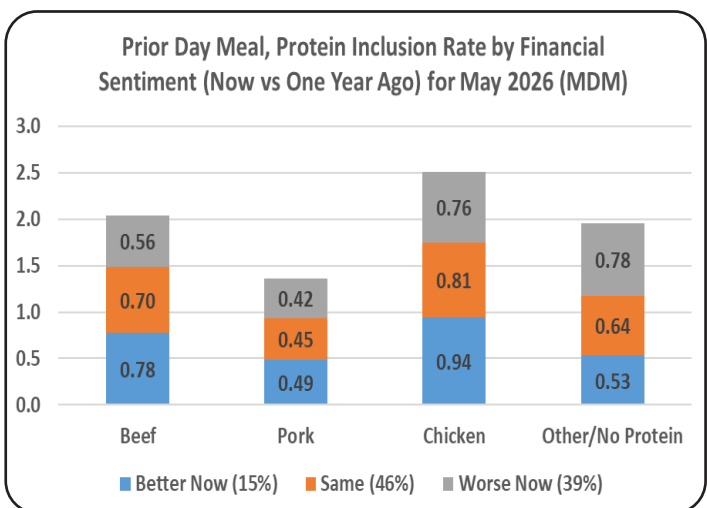
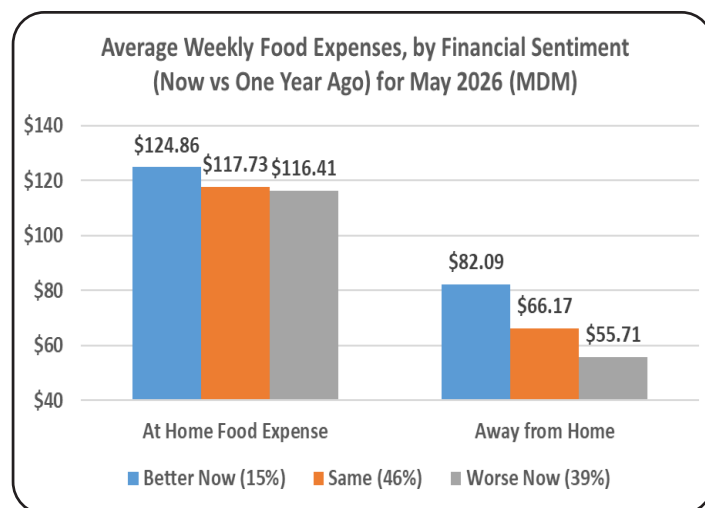
In May, 77% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 7% indicate they are either Vegan Vegetarian or Vegetarian.



## Ad Hoc Questioning

In May 15% indicate their household finances are better than one year earlier (vs. 17% in March) while 46% indicate same and 39% 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. 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](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.**

