

A close-up photograph of a black metal tray containing several pieces of grilled chicken, red and green bell peppers, and a purple onion, garnished with fresh rosemary. The food is arranged diagonally across the frame.

#PROTEIN MOMENT

July 27-29, 2026

Innisbrook Resort
Palm Harbor, Florida

**CHICKEN
MARKETING
SUMMIT**

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Maeve Webster

President

Menu Matters LLC



THE QSR CHICKEN BATTLEGROUND

Consumer Demand Meets Innovation

Menu
Matters

Who are we?





A photograph of a modern, industrial-style restaurant interior. The space features exposed brick walls, large multi-paned windows, and several large, dome-shaped pendant lights hanging from the ceiling. In the foreground, a man with a beard and a baseball cap is seated at a table. Behind him, a woman with long dark hair is also seated. To the left, a man in a dark t-shirt is walking. In the center, a man in a white t-shirt with the word "GUSTO" on it is standing near a table. To the right, a woman in a dark coat is walking. Further right, a man is seated at a table, and a woman is standing near a doorway. The background shows a doorway with a sign that says "EXIT" and "DOWNSTAIRS". The overall atmosphere is warm and bustling.

WE SPECIALIZE IN HUMAN-CENTERED
INSIGHTS FOR THE F&B INDUSTRY.





WE BELIEVE FOOD MATTERS.

It's health, heritage, emotion, creativity,
connection. We never take that for
granted.

Neither should you.



Chicken has already won the
protein war



THE PROBLEM

So why does QSR chicken still feel like a fight to fight to the death?

When everyone offers chicken it's not a differentiator but table stakes.

Why every brand became a
chicken brand



The chicken
opportunity,
courtesy of
COWS



86M

head of cattle — the smallest U.S. herd since the 1950s, with drought and wildfire discouraging ranchers from rebuilding.

\$8.62

per pound for ground beef ahead of July 4th, after hitting a record \$6.69 in December 2025.

+10%

USDA's forecast for further beef price increases in 2026.

It will take years for herds to build back up...giving everyone time everyone time to get into chicken.





“The chicken category is bigger than beef globally, and it's and it's growing two times faster.”

Chris Kempczinski, CEO, McDonald's — Q1 2026 earnings call



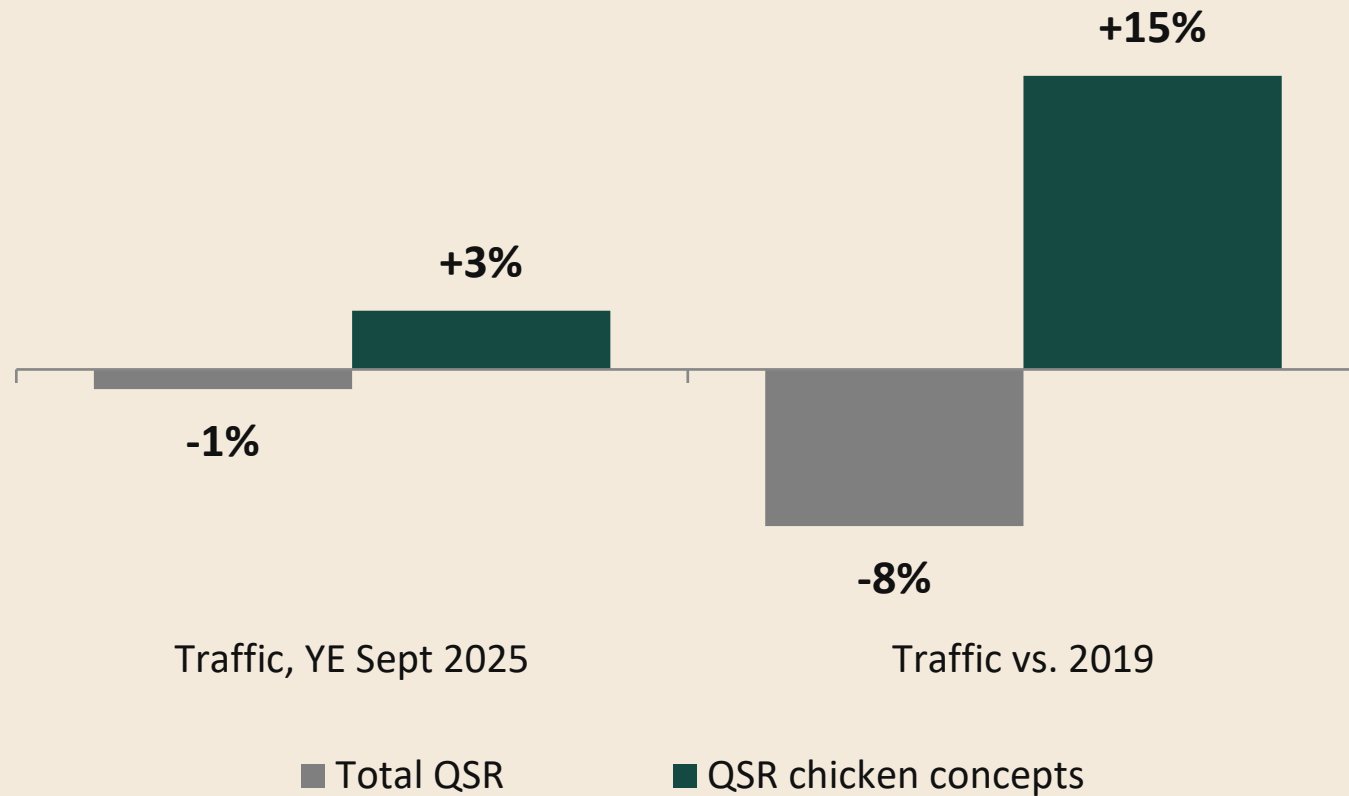
The world's largest beef buyer is reorganizing around chicken.

WHAT THEY'RE DOING

- Built a standalone global category management team for chicken
- Quietly testing ~10 new chicken items: sandwiches, McCrispy Strips flavors, wings, a standalone dip
- Focused on growing chicken share at least 1 point by end of 2026 vs. 2023
- Share of chicken in fast food holds at high-teens vs. a mid-40s share in beef

THE PROOF

Chicken concepts are the only part of QSR still growing traffic.



+ 4.7%

growth in chicken concept units in a year, versus 1.5% for the industry overall.

\$52B+

in systemwide sales across U.S. chicken restaurant concepts.

THE TAILWIND

Protein has become a design menu requirement.

+111%

growth in menu penetration of the word 'protein' across chain menus in past four years.

66%

of consumers say they're interested in high-protein foods and beverages.

31%

of current GLP-1 users are buying more fresh chicken — behind only fresh produce and yogurt.

Chicken is the only protein consumers rank at the top for flavor, health, value, and versatility at once. They love it and feel good about it.





A tailwind everyone gets is not an advantage.

THOUGHT STARTER

**The fight is no longer for chicken's
share of the plate.**

**The fight is for share of a category that
everyone has entered.**



Extreme value sensitivity vs the
willingness to trade up



The same consumer is doing both things.

THE FLOOR

Hyper price-sensitive

Households have fragmented protein purchasing across value grocers, clubs, dollar stores, mass, and c-stores. Middle income joined lower income in the pullback in the back half of 2025. They refuse to feel like they're compromising on quality.

THE CEILING

Craveable, full-margin

Paying full price for a limited-time item that feels like an event. Upgraded and premium claims are both growing.

Creating portion-based value, extending value options beyond QSR beyond QSR burgers.

Wingstop

\$5 Flavor Cravings are smaller-format versions existing items tested through July 2026.



Popeyes

\$3.99 chicken wraps launched as an LTO in 2025, made permanent in May 2026.



Hardee's

'Tender Bender BOGO on 3-piece hand-breaded tenders for members.



WHAT CONSUMERS WILL PAY UP FOR

- Craveable, event-shaped items with a countdown
- Signature sauces they cannot get anywhere else
- Texture and crunch callouts
- Nostalgia with an upgrade
- Format novelty: the wrap, the cup, the dusted nugget

The LTO is doing double duty right now, driving margin and creating interest.

But the LTO trade-up teaches guests that permanent menu items are the compromise. Guests are trained to wait.

INNOVATION STARTING POINT

**How do QSRs build interest that
doesn't teach guests to wait? How do
you drive value that isn't price-based?**

**How do we drive interest to future
proof chicken?**



Formats shifts



FORMAT SHIFT #1

You're in the tender wars now

In the Hamptons, Even the Chicken Tenders Are Living Fancy

It's summer on the South Fork. Care for some nuggets and caviar?



THE TENDER LAND GRAB, 2025–2026

- McDonald's: McCrispy Strips, first strips since 2020
- Wendy's: 'Tendys' + six new dipping sauces, a core menu item
- KFC: Original Recipe Tenders relaunched with the 11 herbs and spices
- Chili's: Crispers driving the Triple Dipper phenomenon
- Hardee's: an entire weekday named after them
- Raising Cane's: +85 net units, 10.3% growth, on five items

FORMAT SHIFT #2

Sauce is the product, chicken is the delivery



Wingstop - UAE

Snacking is where the growth is.

The wrap

McDonald's Snack returned after a and sold out. made \$3.99 wraps permanent. Sonic Long John Silver's followed.



The nugget

Taco Bell's Diablo Dusted nuggets use crushed tortilla chips the coating. Jollibee brought nuggets to U.S. in July as an ramp to Chickenjoy.



The cup

Tyson's Chicken Bites Cups won 2026 Product of the Year in protein snacks — 30g of protein, grab-and-go, sold at retail. The QSR version doesn't exist yet.



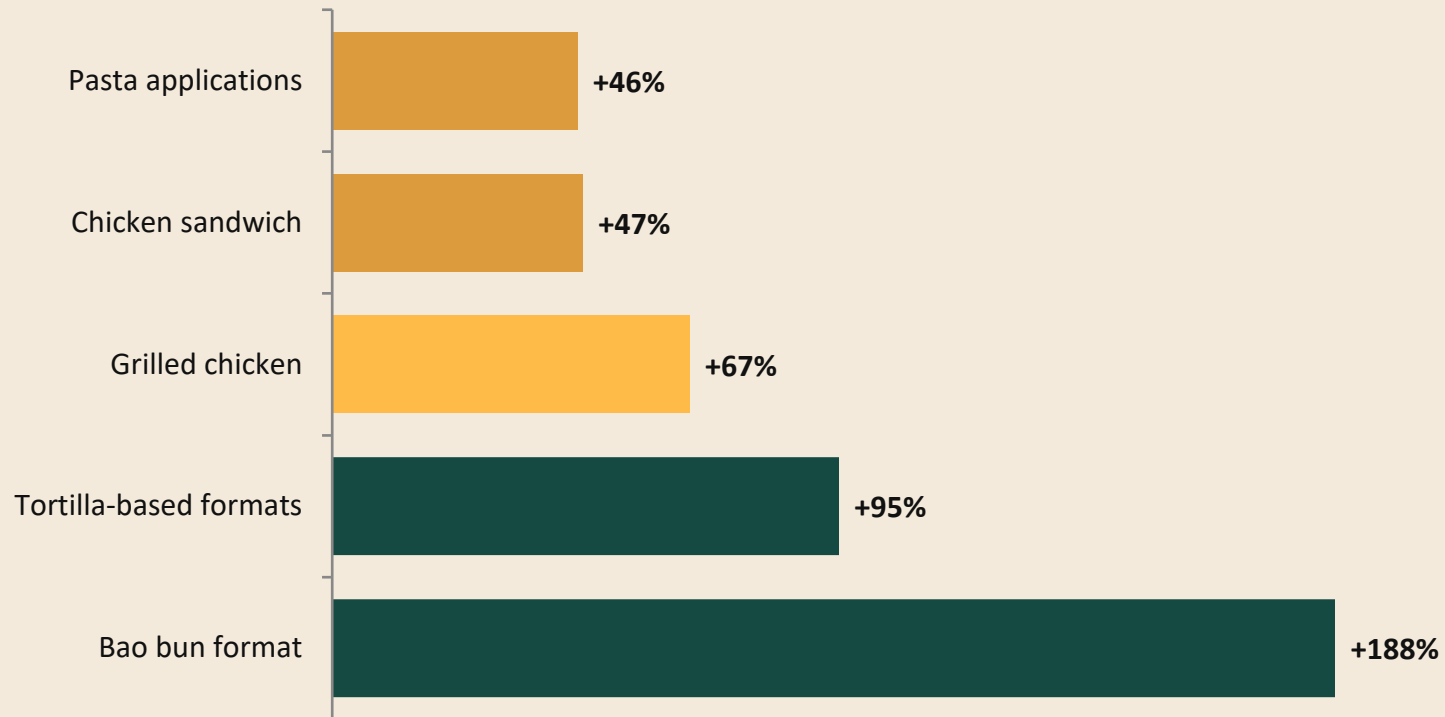
The bucket, shrunk

Jollibee's mini Wingstop's 4-piece. Chick-fil-A's snack-everything. AMC sells popcorn the concession



FORMAT SHIFT #4

Consumers are moving to new applications.



The bun is
negotiable.

“Cut” opportunities



FORMAT SHIFT #1

Dark meat is finally celebrated, and not just for its value.

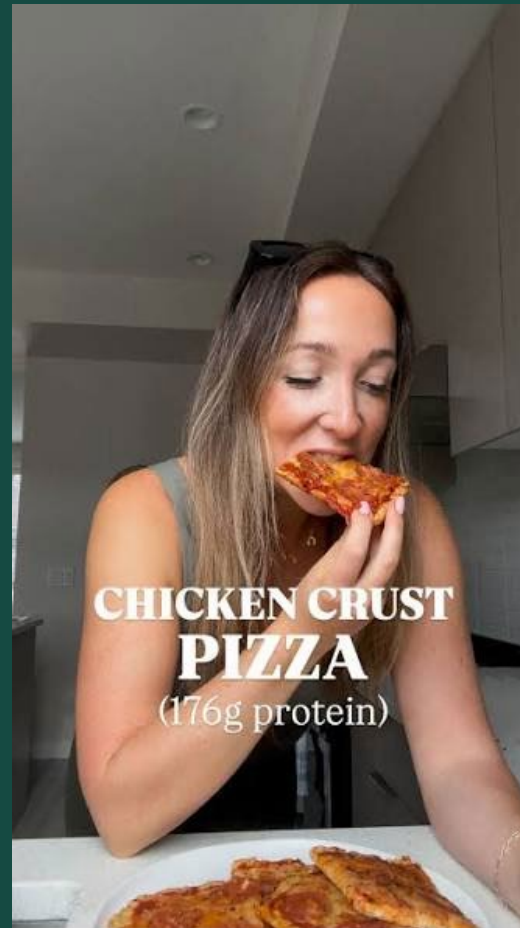


What the Rise of Chicken Thighs Says About America

Several of the country's cultural and economic trends are converging in one piece of meat

NEW CUTS #2 · RETAIL LEADS

Ground chicken gains momentum thanks to a recipe hack did it.
did it.



NEW CUTS #3

The whole bird is back.



WHY IT FITS 2026

- Feeds a family without feeling like a discount
- Reads as minimally processed in a UPF-skeptical market
- Carves into multiple dayparts and multiple formats from one SKU
- Whole-bird buying stabilizes cost exposure (Wingstop's stated reason for chasing it)
- It looks like food. Not like a product.

Le Bouchon Owners Are Bringing A Rotisserie Chicken Spot To Taqueria Chingon Space

Chez Poulet, from brothers Oliver and Nicolas Poilevey, will be a counter-service restaurant for French comfort food, wine and bread from Mindy's Bakery.

What's falling flat?



LOSING STEAM

Four things that were the answer eighteen months ago.

The chicken sandwich as growth vehicle

Sandwiches still sell but they no longer move
Business Insider now lists the chicken sandwich
trends unlikely to survive 2026 as a growth story.

The undifferentiated house sauce

Creamy, mildly spicy, comeback-adjacent. A signature
signature sauce that tastes like everyone else's signature
signature sauce is not an asset.

'GLP-1 friendly' labeling

Acosta found the callout raises doubts about taste
quality. Lead with protein content, nutrient
portion flexibility instead.

Plant-based chicken

Plant-based meat menu incidence fell 3% while animal
animal meat rose 2%. 72% of operators say animal
protein delivers more bang for the buck.

How does this tie into broader
consumer needs?





Get Into the Customer Mind



We're always looking for
indicators or signals to dive
into.

INDICATOR ➡ RESEARCH ➡ INSIGHT

A person's arm is extended from the left side of the frame towards the center, reaching out towards several tall, thin stalks of grass with feathery seed heads. The background is a soft-focus field of similar grass under a hazy, golden-brown sky. The overall mood is contemplative and natural.

2026 CONSUMER NEED

Give Me Something Real



**42% of consumers were
unaware potato chips were
made from potatoes**



941 comments



nae529nae

I wanna know why they now say "now made with real potatoes". Like what were you using before 🤔

2d

Reply



♡ 6,015



— View 36 replies ▾

POTATO CHIPS

NET WT. 8 OZ. (226.8 g)



How to Be Real

Cut Through the Noise To Get to What's Real



One of the most successful chicken menus in America has five items.



THE NOISE TAX

- 51% say there's too much advertising in modern life
- 31% won't download another restaurant app
- 43% say life was better before everything was a subscription
- 47% rate restaurant noise a 7 or higher out of 10 — Young Millennials most of all



How to Be Real

Celebrate What Makes Me Unique &
Allow Me to Be My Real Self



Customization is not the same as being seen.

WHAT THE INDUSTRY BUILT

Unlimited Choices

Delivers control, not recognition.

Creates anxiety, frustration and fatigue.

WHAT THE CONSUMER ASKED FOR

To be a specific person

Curated sauce menus are a story guests can tell others.

The brands winning Gen Z aren't offering more options but a clear personality.





How to Be Real

Create Real Human to Human Understanding



We asked consumers to choose between the algorithm and the family, and the family wins every time.

“Sharing a meal is a more reliable predictor of wellbeing than income or employment status.”

— Harvard Kennedy School

For fried chicken, the human proof is unusually easy: hand-breaded, hand-tossed, cooked in this building, by a person, today.



How to Be Real

Create Real Meaning







How to Be Real

Give Me Someone Real to Trust



‘Real ingredients’ is the #1 claim in food.

CLAIM	TOTAL	GEN Z	YOUNG MILL.	OLDER MILL.	GEN X	BOOMERS+
Made with real ingredients	55%	59%	74%	65%	57%	39%
No artificial ingredients	50%	51%	67%	57%	53%	37%
Family owned	45%	53%	64%	53%	42%	29%
Locally sourced	44%	49%	67%	51%	44%	30%
Heritage recipe / traditional methods	36%	46%	58%	44%	35%	18%
Community focused or gives back	35%	53%	56%	41%	31%	18%
Transparent supply chain	31%	43%	54%	39%	31%	12%
‘ Made by’ + the name of the chef or farmer	28%	40%	52%	35%	26%	11%

Gold = indexes significantly above total. Young Millennials — the ones feeding families right now — over-index on every single claim.



Where the white space is



SIX BETS

Where the white space is in QSR chicken.

Dark meat as a flavor claim

Not as a value cut. The moment you discount it, you re-teach the lesson that white meat is better. Sell juiciness, sell richness, sell the thing chefs have always known.

The ground chicken format nobody nobody built

Retail is up 32% and inventing formats Instagram. QSR has no ground chicken. No smash patty, no meatball, no crust, kofta. An open lane.

The whole bird, reclaimed

Grocery owns the most 'real' object in the category and is using it to take your midday midday occasion. Boston Market's hole has been open for years. Somebody should fill should fill it.

Un-breaded craveability

Grilled chicken is up 67% with almost no innovation behind it. In a UPF-skeptical the un-fried, visibly-real chicken item is category's biggest unserved need.

Sauce with a story, not a number

Twenty sauces is a decision tax. One sauce with a person, a place, and a reason behind it is a brand. Cane's proved it with a sauce nobody can even describe.

Say the human part out loud

Hand-breaded. Cooked here. By Today. Already true in most of your and exactly what an AI-exhausted asking you to prove.

INNOVATION STARTING POINT

What is your “we’re getting real with you” chicken item? Not your cheapest. Not your spiciest. The one that proves you’re not messing with them.



THE TAKEAWAY

**Chicken won the protein war
on economics.**

**It will win the loyalty war on
belief.**



HUMAN-FOCUSED INSIGHTS

Menu Matters

FOR THE F+B INDUSTRY



THANK YOU

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