Kansas State
Department of
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MDM: Meat Demand Monitor

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

RETAIL	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Nov-24 WTP ($/lb)	$17.29	$8.17	$6.93	$5.97	$8.19	$7.82	$9.28	$2.99	
Market Share	8%	23%	13%	8%	28%	2%	4%	7%	7%
Dec-24 WTP ($/lb)	$17.38	$8.58	$7.01	$5.86	$8.14	$7.44	$9.10	$3.01	
Market Share	8%	25%	13%	8%	26%	2%	4%	7%	7%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Nov-24 WTP ($/meal)	$26.65	$20.20	$15.83	$18.50	$18.01	$11.93	$17.90	$18.76	
Market Share	15%	27%	5%	10%	15%	3%	13%	8%	6%
Dec-24 WTP ($/meal)	$27.49	$20.91	$16.33	$19.02	$18.84	$11.93	$18.31	$19.79	
Market Share	15%	26%	5%	10%	15%	3%	12%	9%	5%

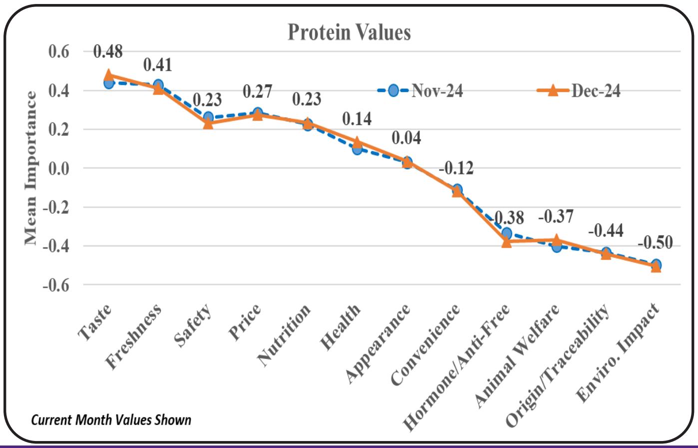
Willingness-to-pay (WTP) increased on four evaluated Retail products in December compared to November. WTP increased for all evaluated Food Service dinner meals in December.

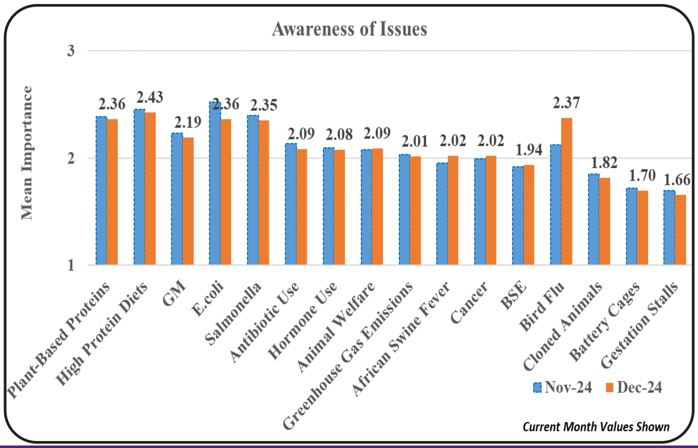
The combined beef and pork projected market shares for December are 33% and 21%, respectively at the grocery store and 42% and 14% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, there are 48% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 50% more consider Environmental Impact a bottom-4 factor than consider Environmental Impact a top-4 purchasing factor.

Plant-based Proteins, High Protein Diets, and Bird Flu remain topics heard or read most about.





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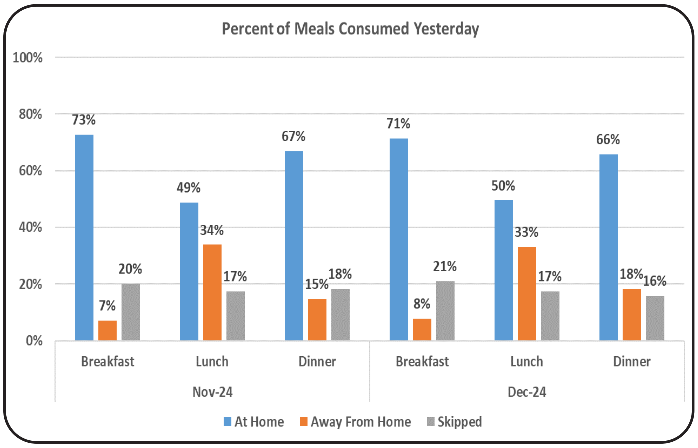
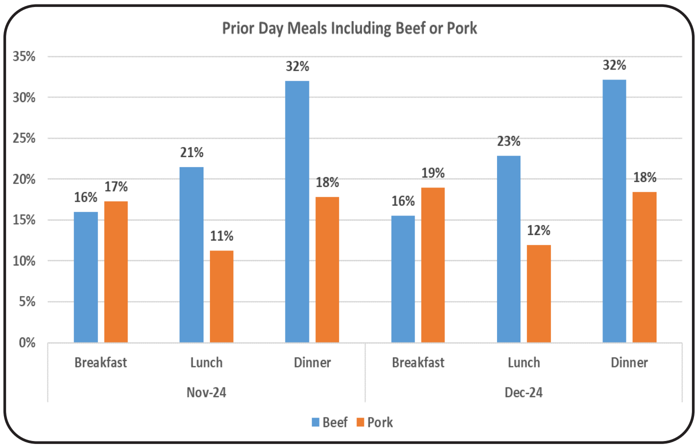
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 71%, 50%, and 66% consumed breakfast, lunch, and dinner at home in December with breakfast and dinner being lower than in November. In December, 16%, 23%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 18% of these meals.

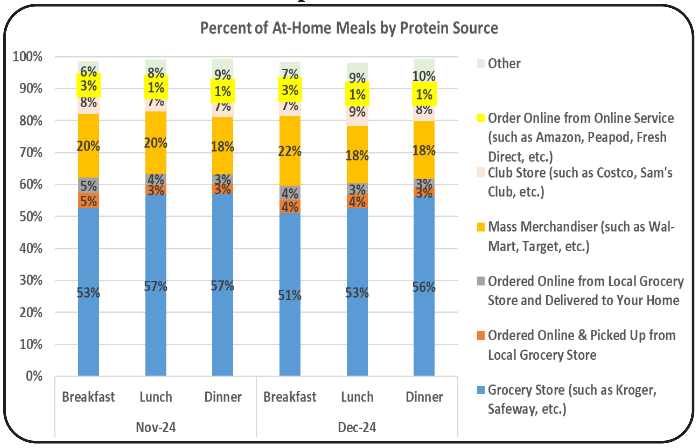


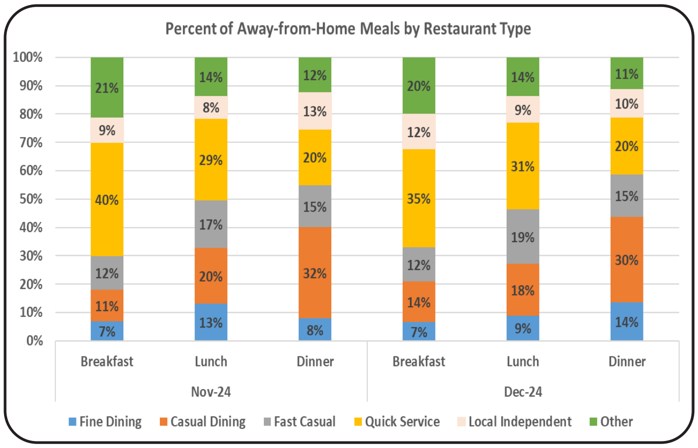


Prior Day Meals: At-Home Protein Source & Restaurant Type

In December, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 29%, 27%, and 26% 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 meals while Casual Dining (Applebee's, Olive Garden, Outback, etc.) led for dinner. Combined, Casual Dining, Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 61%, 68%, and 65% of breakfast, lunch, and dinner meals in December.





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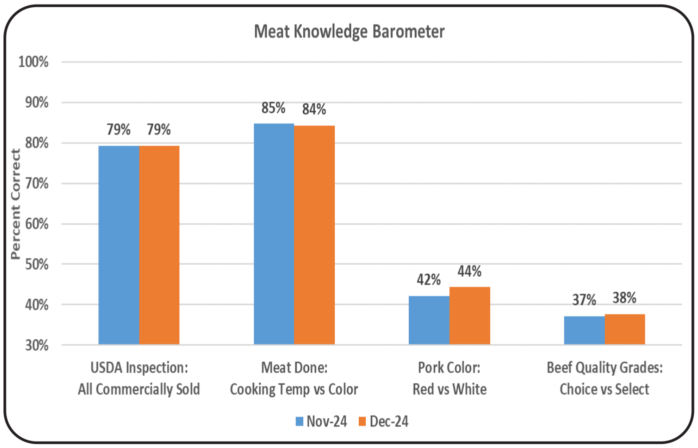
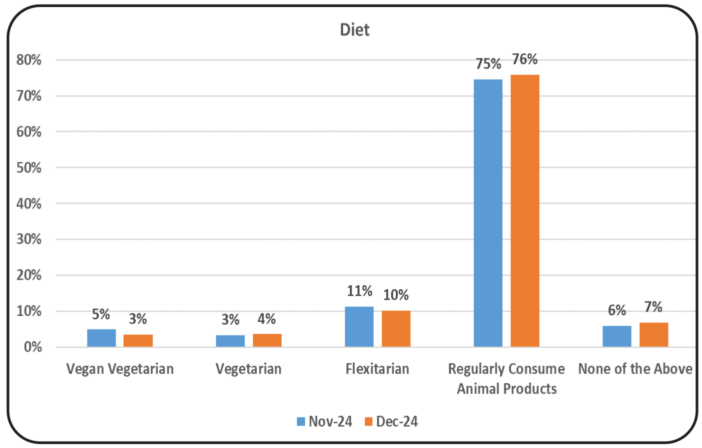
Additional MDM Project details are available at: https://www.agmanager.info/

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 December, 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 December, we asked "... whice ONE of the following cooking appliances you use the most often." Air Fryer, Toaster/Toaster Oven, and Slow Cooker were most frequent selections. The first figure below shows how this aligns with braoder U.S. public segmentation as discussed in the latest MDM special report (Nov. 19, 2024 posting to AgManager.info). The second figure augments this with Protein Value by segment details.

Mindful Choicemakers place the lowest importance on Convenience and are least likely to indicate an Air Fryer is most often used. Meanwhile, Simple Feeders comparatively prioritize Convenience in protein purchasing decisions and are most likely to use Toaster/Toaster Ovens.

	Culinary Adventures	Mindful Choicemaker	Culture Celebrators	Tasty Value Seekers	Confident Meat Eaters	Simple Feeders	Meat Minimizers
Air Fryer	31.73	25.12	32.53	31.98	29.82	26.67	32.17
Deep Fryer	**3.48**	**3.71**	**1.16**	**2.79**	**4.01**	**2.35**	**3.9**
Electric Grill	6.74	7.76	7.16	4.02	5.45	5.82	5.22
Pressure Cooker	**5.88**	**3.94**	**6.76**	**2.79**	**2.72**	**4.68**	**4.19**
Rice Cooker	5.28	4.57	10.28	6.37	3.74	4.41	8.49
Slow Cooker	**10.09**	**12.53**	**12.17**	**9.59**	**14.44**	**10.07**	**10.3**
Toaster/Toaster Oven	14.38	21.46	18.95	20.23	15.13	23.94	18.2
Outdoor Grill (Charcoal)	**8.88**	**3.92**	**1.01**	**2.98**	**7.36**	**3.28**	**4.59**
Outdoor Grill (Gas/Propane)	9.88	9.98	5.82	9.97	9.99	9.95	4.87
Do not use any of these 9	**3.67**	**7.02**	**4.17**	**9.29**	**7.35**	**8.83**	**8.08**

	Culinary Adventure	Mindful Choicemakers	Culture Celebrators	Tasty Value Seekers	Confident Meat Eaters	Simple Feeders	Meat Minimizers
Freshness	0.37	0.37	0.31	0.42	0.53	0.49	0.33
Taste	**0.38**	**0.43**	**0.41**	**0.49**	**0.68**	**0.57**	**0.36**
Safety	0.22	0.26	0.27	0.20	0.27	0.24	0.19
Price	**0.21**	**-0.02**	**0.23**	**0.41**	**0.42**	**0.42**	**0.17**
Nutrition	0.24	0.31	0.21	0.36	0.22	0.11	0.15
Health	**0.08**	**0.23**	**0.12**	**0.16**	**0.12**	**0.03**	**0.21**
Appearance	0.04	-0.09	-0.04	0.07	0.08	0.15	-0.01
Convenience	**-0.20**	**-0.33**	**-0.18**	**-0.06**	**0.02**	**0.02**	**-0.14**
Hormone/Anti-Free	-0.31	-0.18	-0.28	-0.45	-0.56	-0.45	-0.29
Animal Welfare	**-0.23**	**-0.29**	**-0.30**	**-0.52**	**-0.49**	**-0.39**	**-0.28**
Origin/Traceability	-0.38	-0.33	-0.38	-0.50	-0.59	-0.58	-0.29
Env. Impact	**-0.41**	**-0.37**	**-0.36**	**-0.59**	**-0.68**	**-0.60**	**-0.40**

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

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