KANSAS STATE
Department of Agricultural Economics
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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-25 WTP ($/lb)	$17.56	$8.59	$6.57	$5.84	$8.65	$8.05	$9.45	$2.87	
Market Share	8%	24%	11%	8%	29%	2%	4%	7%	7%
Dec-25 WTP ($/lb)	$18.51	$10.23	$8.08	$6.81	$9.61	$8.19	$9.93	$3.57	
Market Share	8%	28%	13%	8%	27%	2%	4%	6%	5%

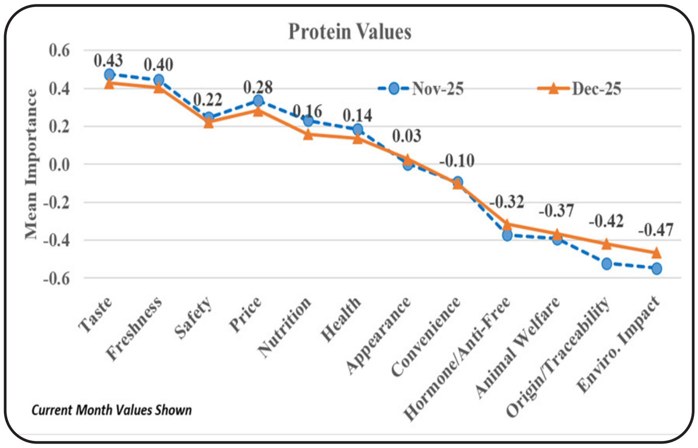
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Nov-25 WTP ($/meal)	$25.61	$19.95	$15.24	$18.04	$17.80	$12.18	$16.99	$18.52	
Market Share	13%	29%	4%	10%	15%	3%	12%	8%	6%
Dec-25 WTP ($/meal)	$27.54	$21.07	$16.04	$18.02	$17.88	$11.53	$17.53	$18.26	
Market Share	16%	27%	5%	9%	14%	3%	12%	7%	6%

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

The combined beef and pork projected market shares for December are 36% and 20%, respectively at the grocery store and 43% 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 28% more considering Price a top-4 factor (of 12 examined) than considering Price a bottom-4 purchasing factor (49% top-4, 30% middle-4, and 21% bottom-4 factor).



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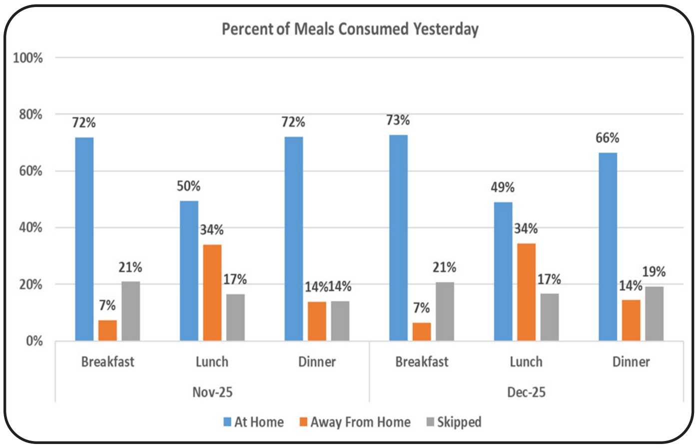
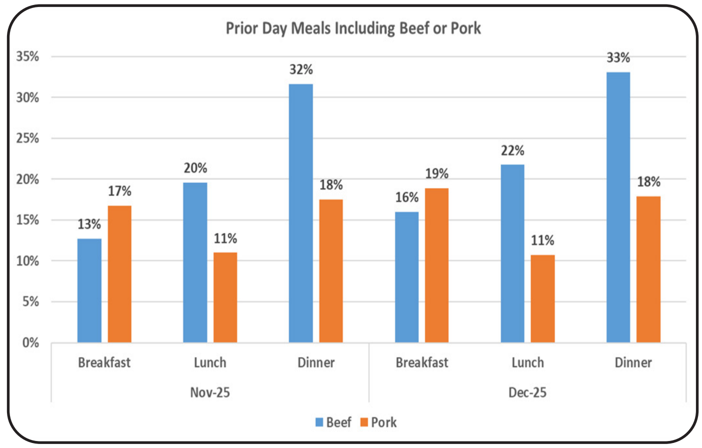
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 66% consumed breakfast, lunch, and dinner at home in December with dinner meals at home decreasing in prevalence from November. In December, 16%, 22%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 11%, and 18% of these meals.

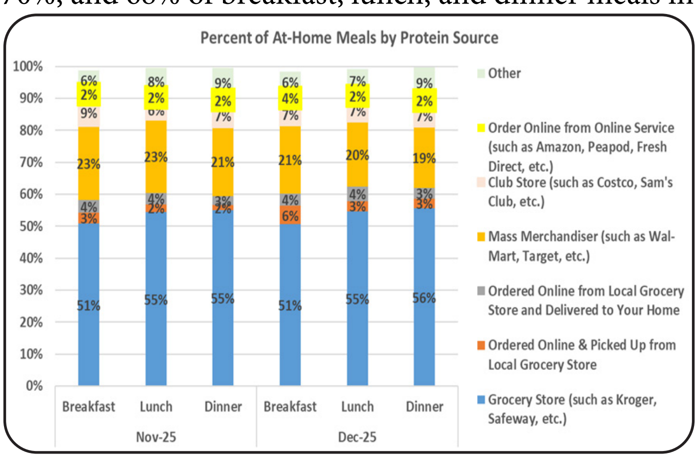


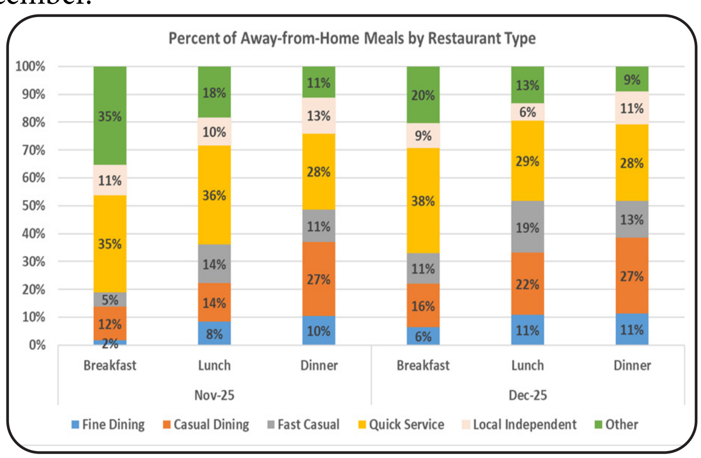


Prior Day Meals: At-Home Protein Source & Restaurant Type

In December, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 28%, 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, lunch, and dinner. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 64%, 70%, and 68% of breakfast, lunch, and dinner meals in December.





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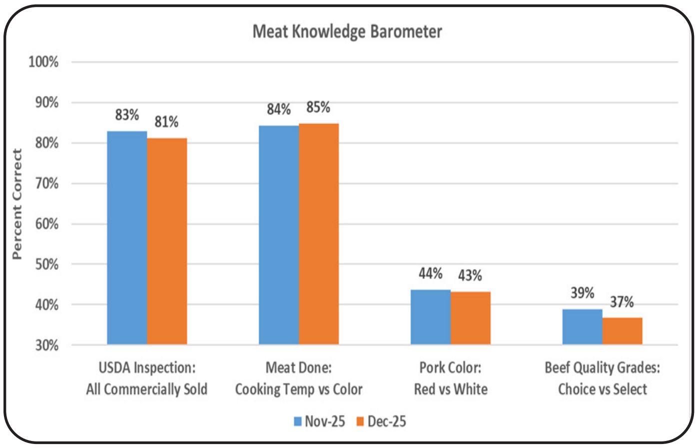
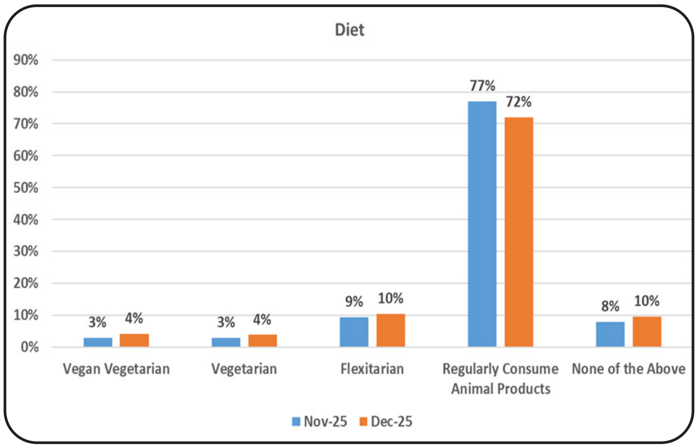
Additional MDM Project details are available at: https://www.agmanager.info/

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, 72% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.

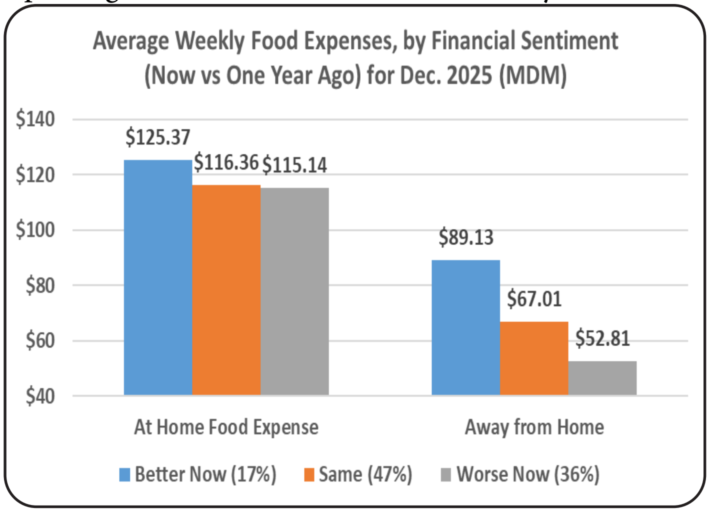


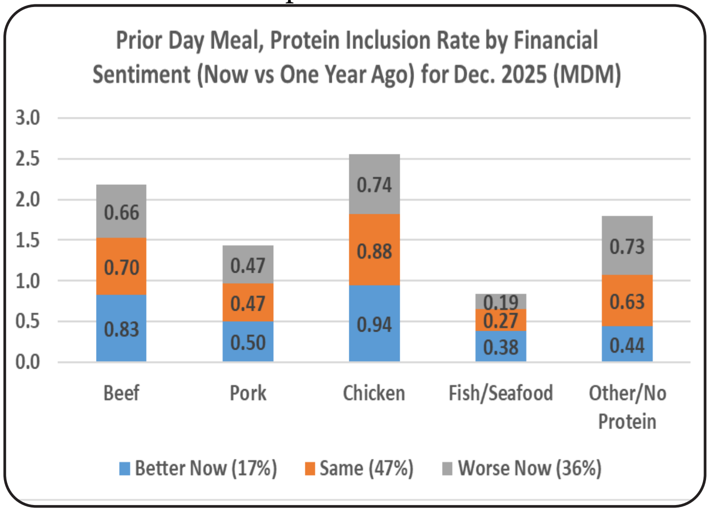


Ad Hoc Questioning

In December 17% indicate their household finances are better than one year earlier (vs 19% in October & 17% in November) while 47% indicate same and 36% indicate worse conditions. Those reporting improved finances spend 17% and 28% more on food (across both at- and away-from-home) than those reporting same or worse conditions, respectively with the biggest differences being in away-from-home spending. These trends observed for most of 2025 align with broader “K-shaped economy” discussions.

Prior day meal inclusion of major proteins reinforces the importance of household finances as those reporting worse conditions indicate notably lower meal inclusion rates for beef, pork, chicken, and fish/seafood.





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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