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
Jan-25 WTP ($/lb)	$18.16	$9.02	$7.49	$6.45	$8.66	$8.31	$9.82	$3.39	
Market Share	9%	25%	13%	8%	26%	2%	4%	7%	6%
Feb-25 WTP ($/lb)	$17.83	$9.09	$7.39	$6.09	$8.58	$7.92	$9.95	$3.29	
Market Share	8%	25%	13%	8%	25%	2%	5%	7%	6%

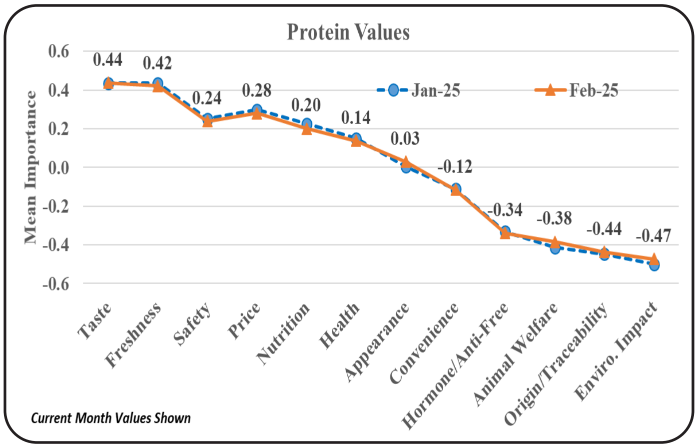
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jan-25 WTP ($/meal)	$26.12	$20.01	$16.42	$18.57	$17.75	$13.20	$17.28	$19.26	
Market Share	14%	26%	5%	10%	14%	4%	12%	9%	6%
Feb-25 WTP ($/meal)	$28.00	$21.18	$17.04	$18.92	$18.94	$12.29	$18.06	$19.84	
Market Share	16%	26%	5%	10%	15%	3%	12%	9%	5%

Willingness-to-pay (WTP) decreased on six evaluated Retail products in February compared to January. WTP increased on seven evaluated Food Service dinner meals in February.

The combined beef and pork projected market shares for February are 34% and 21%, respectively at the grocery store and 42% and 15% at the restaurant.

Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, there are 44% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 47% more consider Environmental Impact a bottom-4 factor than consider Environmental Impact a top-4 purchasing factor.



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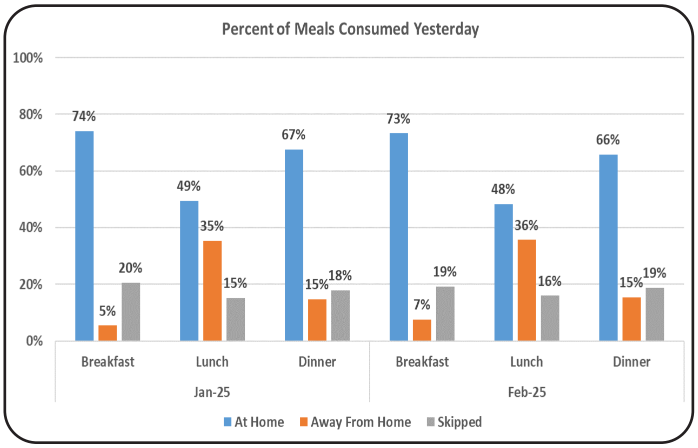
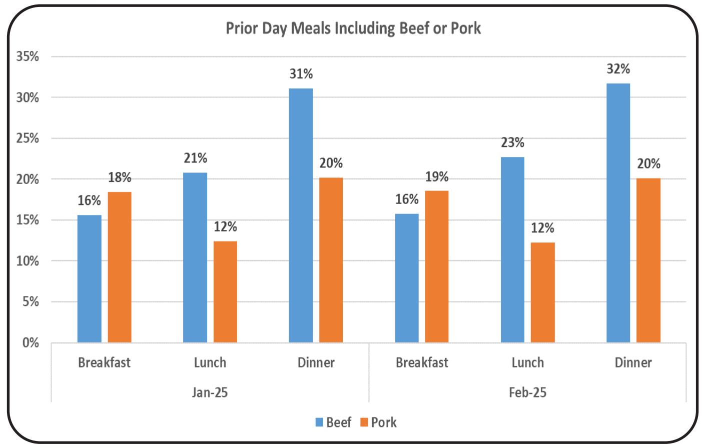
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 48%, and 66% consumed breakfast, lunch, and dinner at home in February with all three meals being lower than in January indicating more restaurant foot-traffic. In February, 16%, 23%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 20% of these meals.

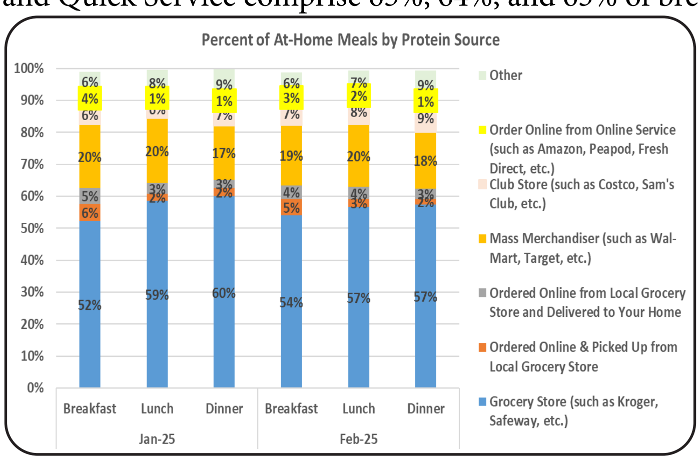


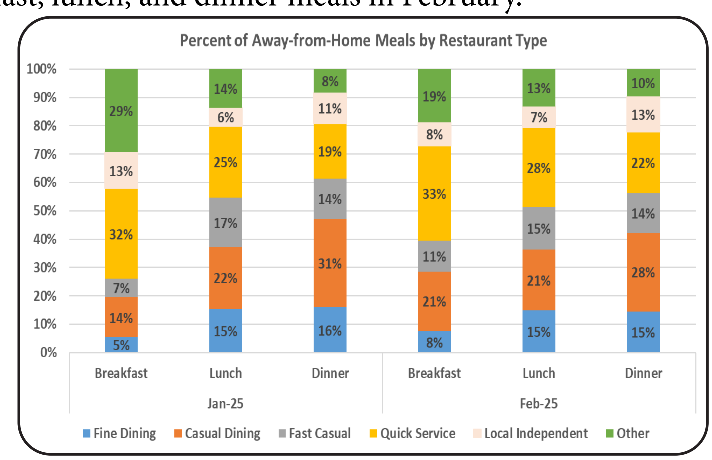


Prior Day Meals: At-Home Protein Source & Restaurant Type

In February, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 28%, 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 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 65%, 64%, and 63% of breakfast, lunch, and dinner meals in February.





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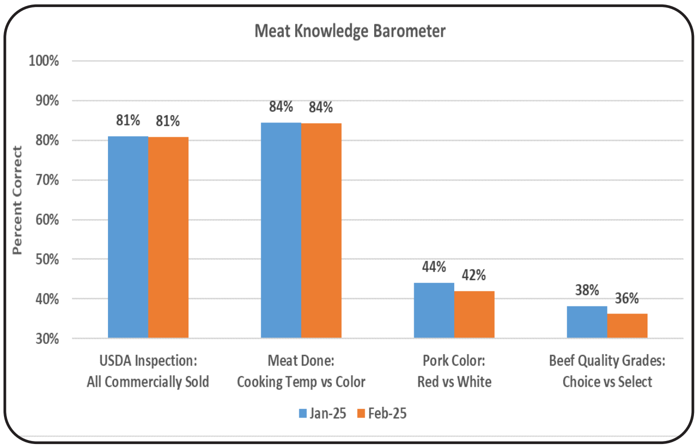
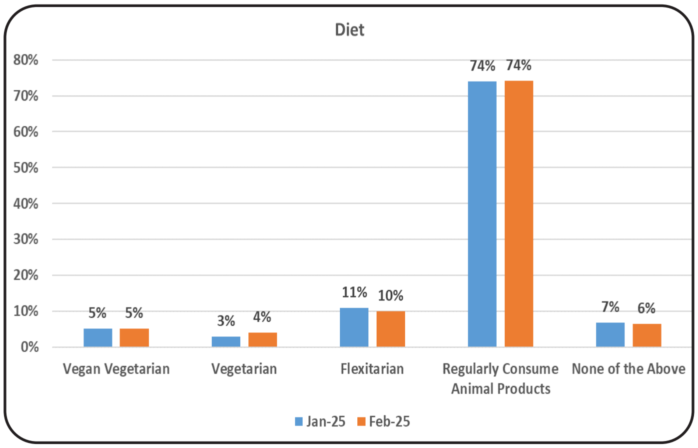
Additional MDM Project details are available at: https://www.agmanager.info/

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 February, 74% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 9% indicate they are either Vegan Vegetarian or Vegetarian.

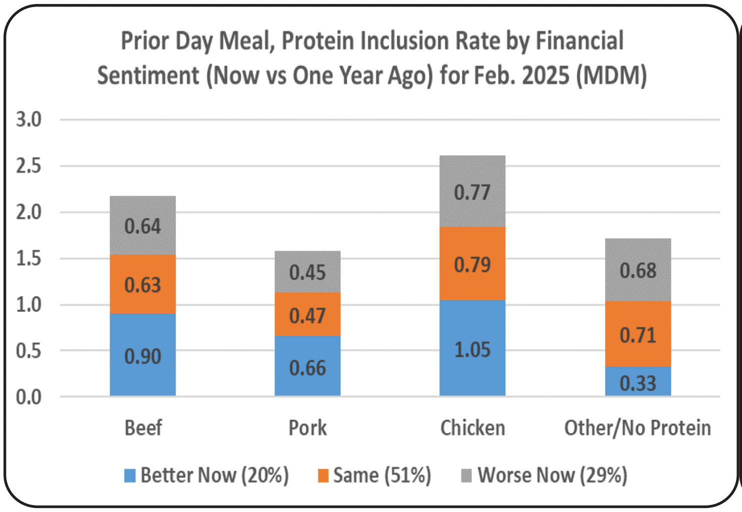


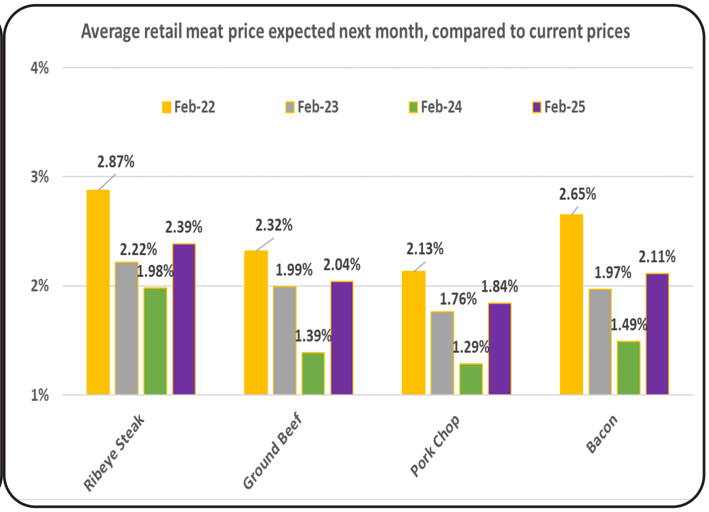


Ad Hoc Questioning

In February, 20% indicate their household finances are better than one year earlier. As shown several times in 2024, this group reports higher prior day rates of beef, pork, and chicken meal inclusion than those reporting same (51%) or worse (29%) financial conditions.

Given elevating interest in retail food prices we also include a summary of how forward-looking retail price expectations in 2025 compare to prior years. As shown on four tracked meat items, retail price expectations are elevated early in February 2025 compared to the past couple years, yet below early 2022 levels.





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.

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