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
Dec-24 WTP ($/lb)	$17.38	$8.58	$7.01	$5.86	$8.14	$7.44	$9.10	$3.01	
Market Share	8%	25%	13%	8%	26%	2%	4%	7%	7%
Jan-25 WTP ($/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%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Dec-24 WTP ($/meal)	$27.49	$20.91	$16.33	$19.02	$18.84	$11.93	$18.31	$19.79	
Market Share	15%	26%	5%	10%	15%	3%	12%	9%	5%
Jan-25 WTP ($/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%

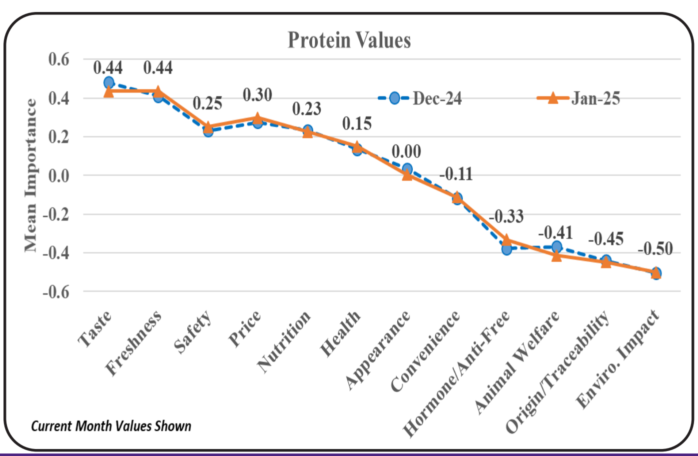
Willingness-to-pay (WTP) increased on all evaluated Retail products in January compared to December. WTP decreased on six evaluated Food Service dinner meals in January.

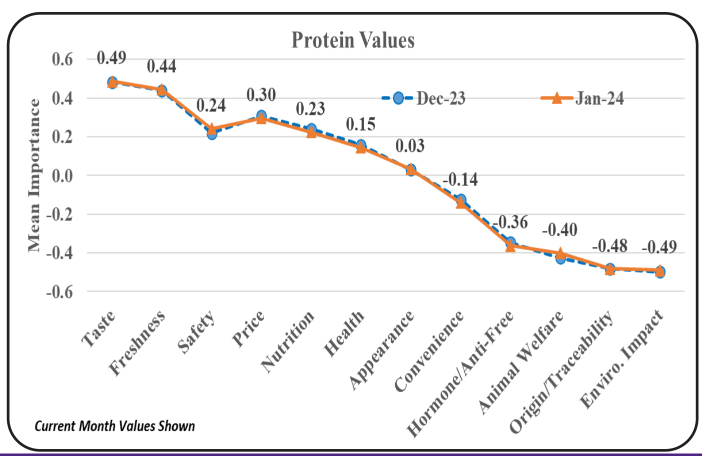
The combined beef and pork projected market shares for January are 33% and 21%, respectively at the grocery store and 40% and 15% at the restaurant.

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, 50% more consider Environmental Impact a bottom-4 factor than consider Environmental Impact a top-4 purchasing factor.

Protein Values early in 2025 also align closely with those from January 2024.





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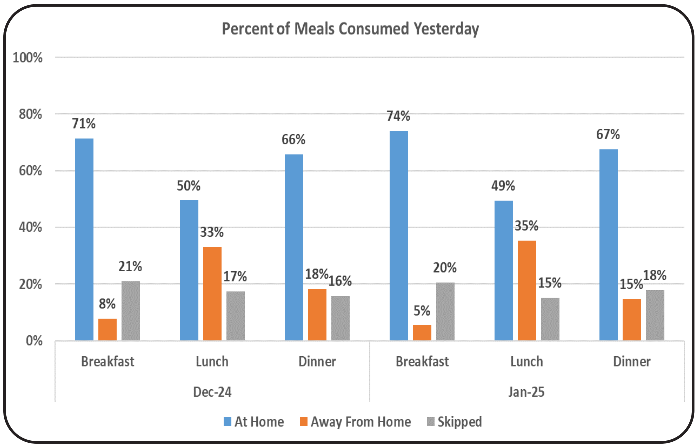
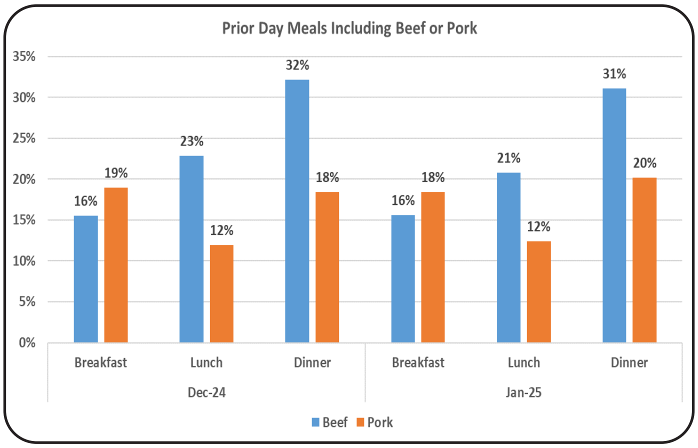
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 49%, and 67% consumed breakfast, lunch, and dinner at home in January with breakfast and dinner being higher than in December. In January, 16%, 21%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 20% of these meals.

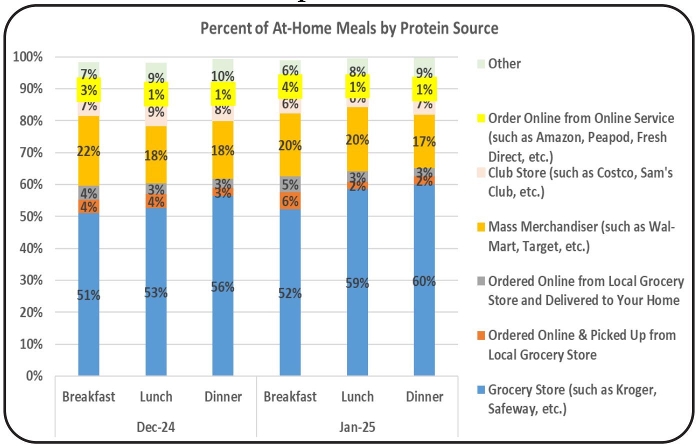


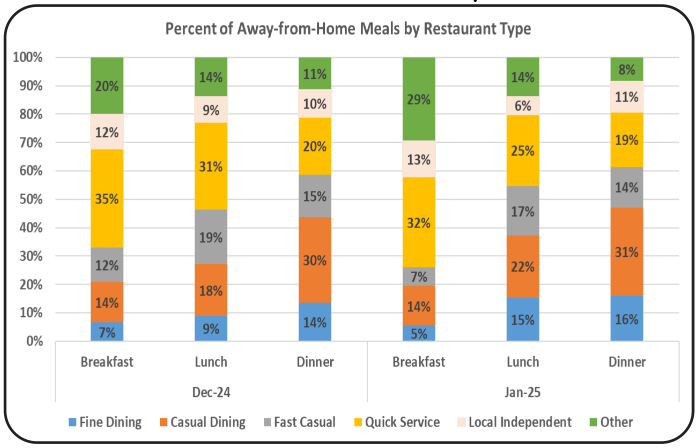


Prior Day Meals: At-Home Protein Source & Restaurant Type

In January, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 26%, and 24% 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 52%, 64%, and 65% of breakfast, lunch, and dinner meals in January.





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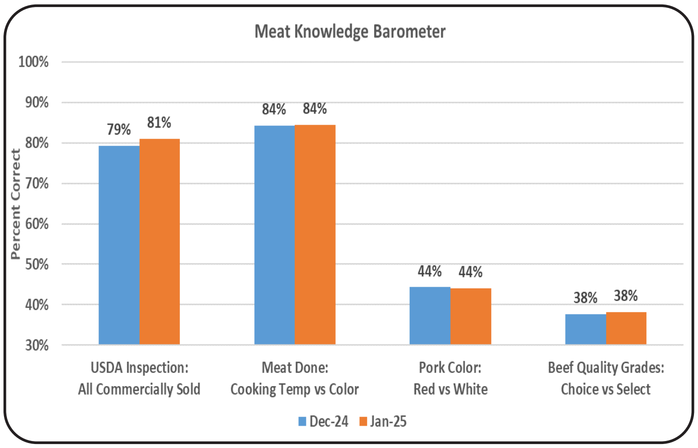
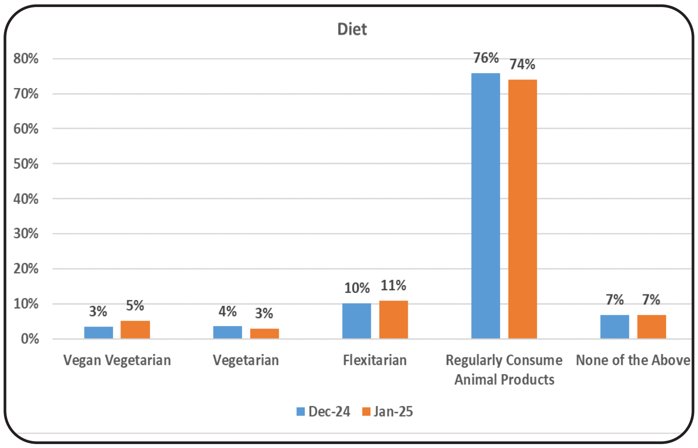
Additional MDM Project details are available at: https://www.agmanager.info/

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 January, 74% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.

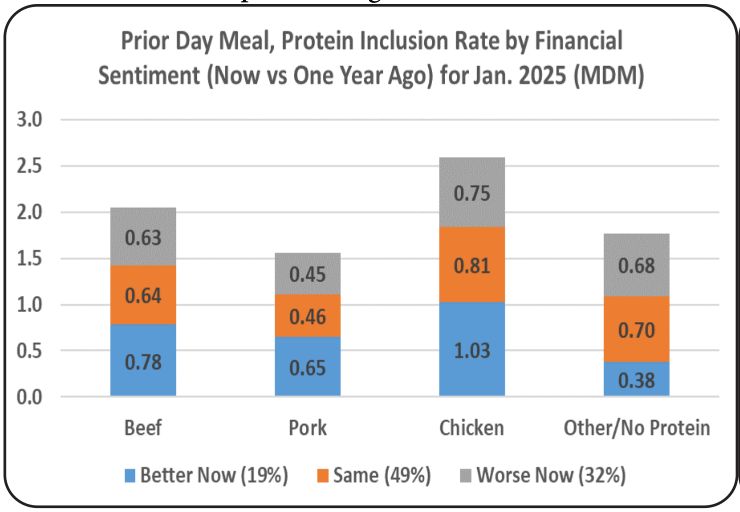


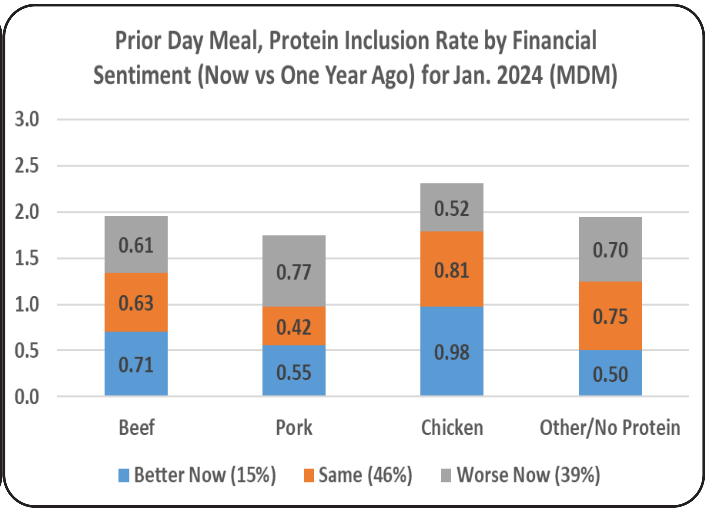


Ad Hoc Questioning

In January 2025, 19% 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 (49%) or worse (32%) financial conditions.

Comparing back to January 2024 data shows not only are more households reporting positive financial conditions (19% vs 15%), but 2025 is starting with beef and pork consumption frequency (inclusion in prior day meals) is not only higher for those reporting improved finances but also the larger group reporting stable finances. This is a positive sign for domestic meat demand as 2025 kicks off.





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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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