KANSAS STATE
Department of Agricultural Economics
Vol. 6, Issue 3 ● Mar. 2025

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
Feb-25 WTP ($/lb)	$17.83	$9.09	$7.39	$6.09	$8.58	$7.92	$9.95	$3.29	
Market Share	8%	25%	13%	8%	25%	2%	5%	7%	6%
Mar-25 WTP ($/lb)	$17.86	$9.02	$7.34	$6.40	$8.89	$8.00	$9.41	$3.45	
Market Share	8%	24%	13%	8%	27%	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
Feb-25 WTP ($/meal)	$28.00	$21.18	$17.04	$18.92	$18.94	$12.29	$18.06	$19.84	
Market Share	16%	26%	5%	10%	15%	3%	12%	9%	5%
Mar-25 WTP ($/meal)	$27.74	$21.65	$16.86	$19.47	$19.01	$12.20	$18.30	$20.23	
Market Share	15%	28%	5%	10%	14%	3%	12%	9%	5%

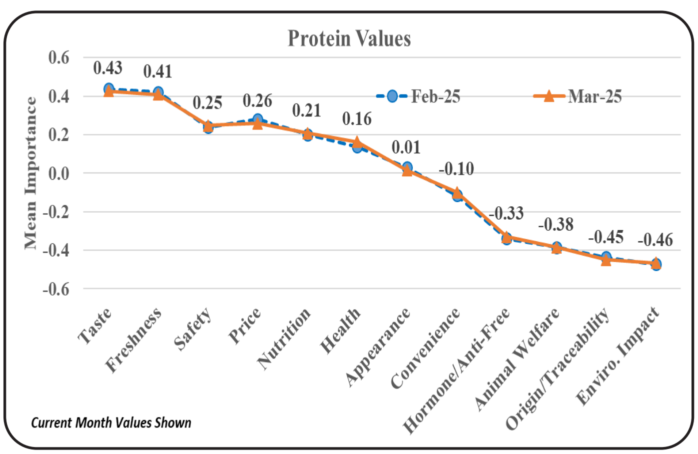
Willingness-to-pay (WTP) increased on five evaluated Retail products in March compared to February. WTP increased on five evaluated Food Service dinner meals in March.

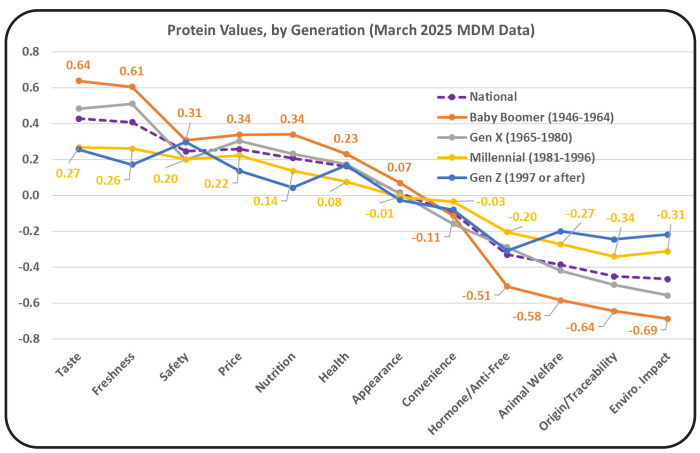
The combined beef and pork projected market shares for March are 33% and 21%, respectively at the grocery store and 43% and 15% at the restaurant.

Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein - a national observation that applies across generations. To guide interpretation of these zero-sum values, nationally there are 43% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor.

The downward slope reveals generally similar ordinal importance of the 12 examined factors across generations. Importantly, older generations place higher relative importance on Taste, Freshness, and Price.



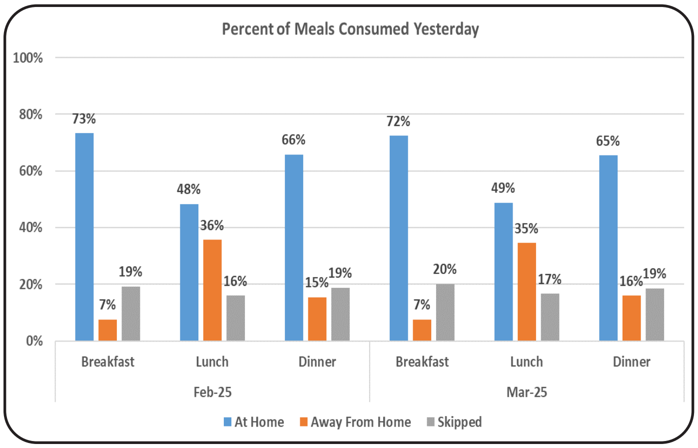


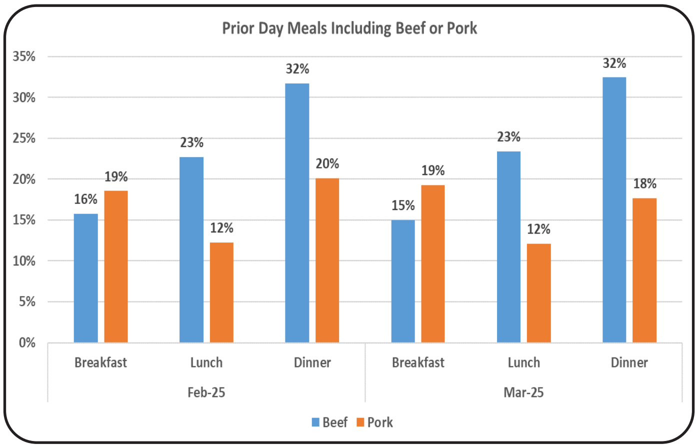
Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

AgManager.info

Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 72%, 49%, and 65% consumed breakfast, lunch, and dinner at home in March with breakfast and dinner meals being lower than in March indicating more restaurant foot-traffic. An increase in reported skipped meals is worth monitoring. In March, 15%, 23%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 18% of these meals.

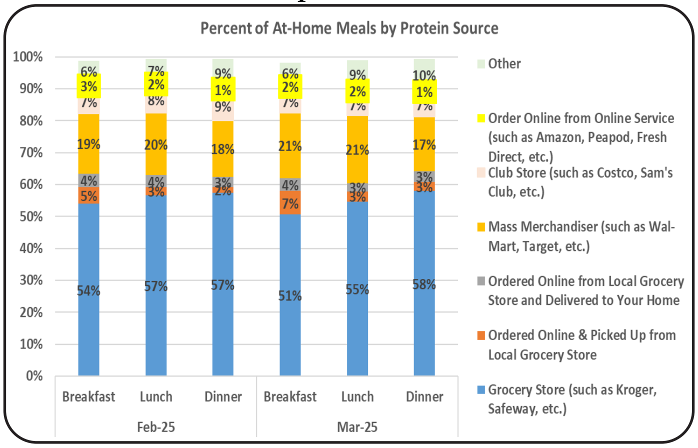


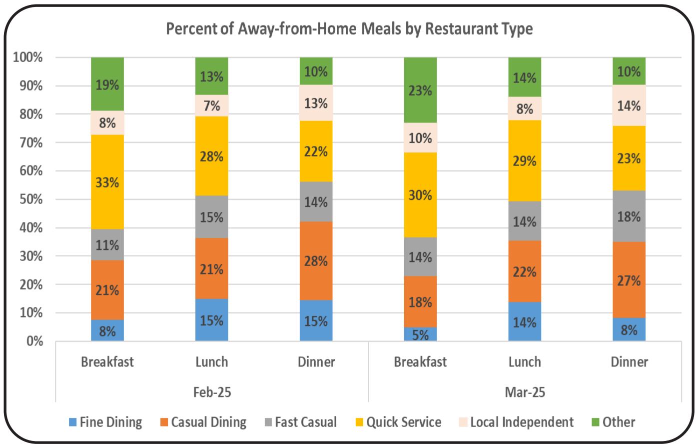


Prior Day Meals: At-Home Protein Source & Restaurant Type

In March, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 28%, 28%, and 25% 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 62%, 64%, and 68% of breakfast, lunch, and dinner meals in March.



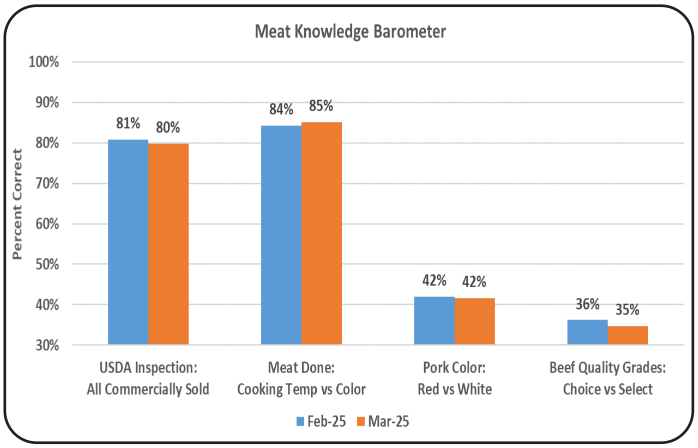


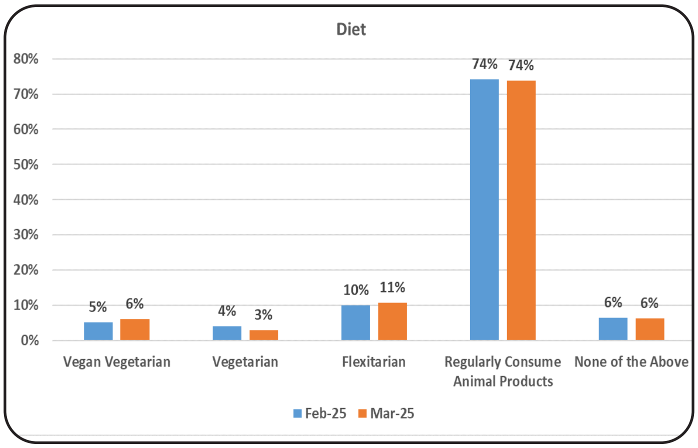
Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

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 March, 74% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 9% indicate they are either Vegan Vegetarian or Vegetarian. Over the last 62 months (Feb. 2020 - Mar. 2025), there is a linear, small upperward trend in rate of "regularly consume animal products" self-declarations.

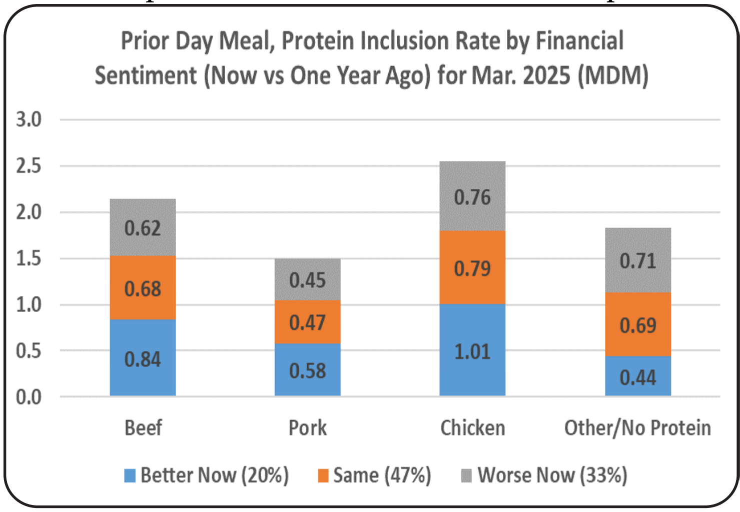


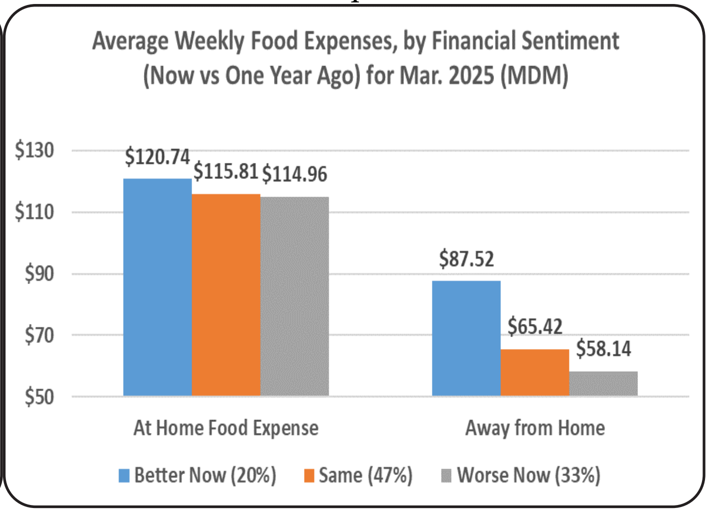


Ad Hoc Questioning

In March, 20% indicate their household finances are better than one year earlier. As shown several previous times in MDM reports, this group reports higher prior day rates of beef, pork, and chicken meal inclusion than those reporting same (47% in March) or worse (33% in March) financial conditions. Unfortunately the share reporting worse financial conditions increased from 29% in February.

The 20% indicating improving finances in March spent about $5/week more on food for at-home consumption and over $32/week more on food away from home. This highlights meal-destination and market channel implications of macroeconomic developments of elevated interest as the 1st quarter of 2025 concludes.





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.

Funded in part by the Beef Checkoff.

Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu