Kansas State
Department of
Agricultural Economics
Vol. 6, Issue 5 ● May 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
Apr-25 WTP ($/lb)	$17.80	$9.20	$7.42	$6.23	$8.89	$8.53	$9.49	$3.52	
Market Share	8%	25%	13%	8%	27%	2%	4%	7%	6%
May-25 WTP ($/lb)	$17.73	$9.09	$7.28	$6.25	$8.80	$8.13	$10.33	$3.46	
Market Share	8%	25%	12%	8%	27%	2%	5%	7%	6%

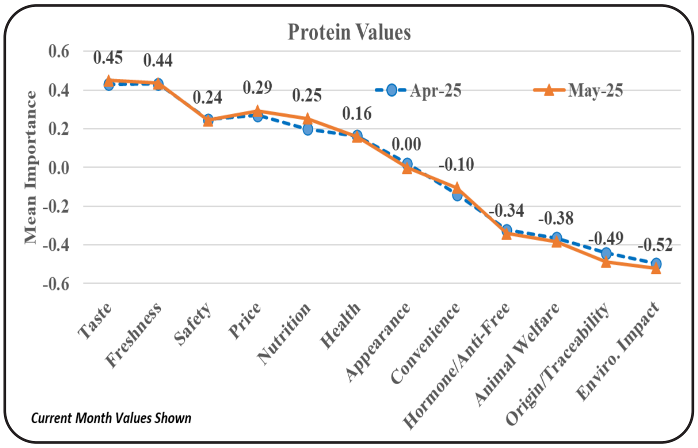
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Apr-25 WTP ($/meal)	$27.86	$21.42	$16.61	$19.22	$18.79	$12.39	$18.78	$19.88	
Market Share	15%	26%	5%	10%	14%	3%	13%	8%	5%
May-25 WTP ($/meal)	$26.56	$20.27	$16.06	$18.20	$18.41	$12.68	$17.74	$19.48	
Market Share	14%	26%	5%	9%	15%	4%	12%	9%	5%

Willingness-to-pay (WTP) decreased on six evaluated Retail products in May compared to April. WTP also decreased on seven evaluated Food Service dinner meals in May.

The combined beef and pork projected market shares for May are 33% and 20%, respectively at the grocery store and 41% 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 45% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Not surprisingy, relative importance of Price grew further since April likely reflecting ongoing macroeconomic developments.



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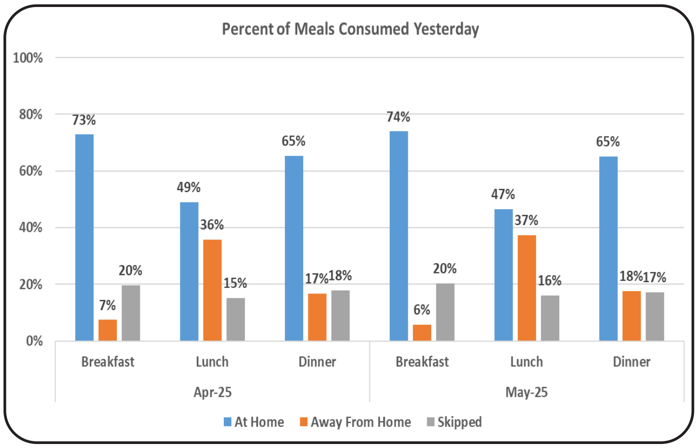
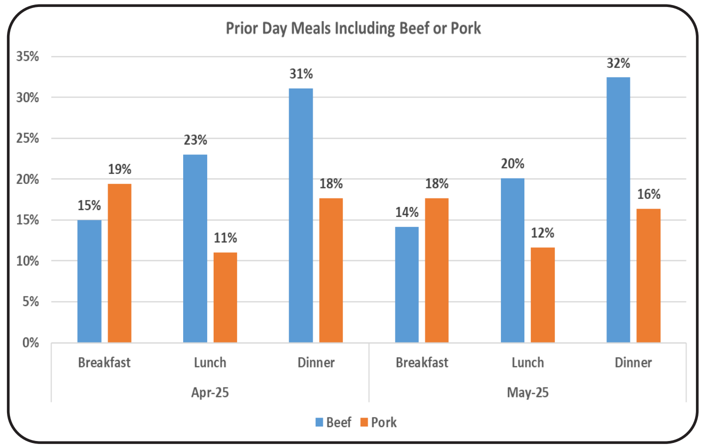
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 47%, and 65% consumed breakfast, lunch, and dinner at home in May with breakfast being higher than in April indicating less restaurant foot-traffic. In May, 14%, 20%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 16% of these meals.

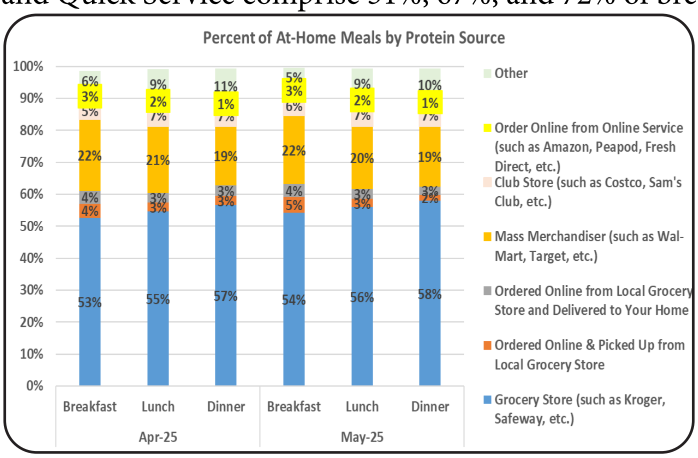


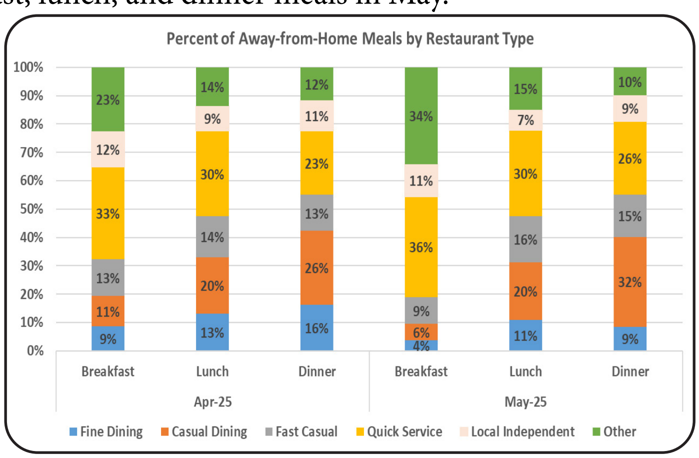


Prior Day Meals: At-Home Protein Source & Restaurant Type

In May, 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 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 51%, 67%, and 72% of breakfast, lunch, and dinner meals in May.





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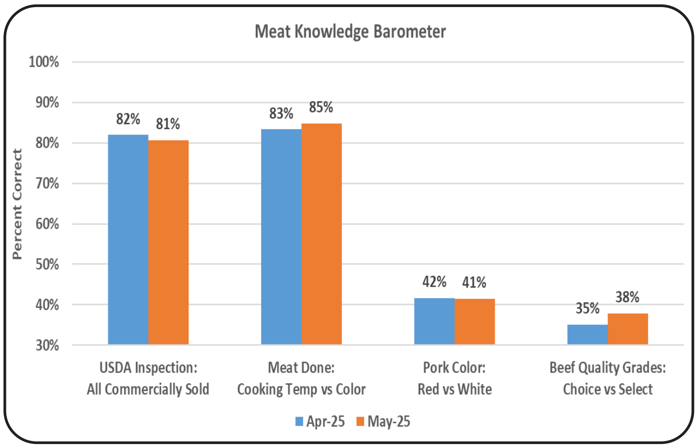
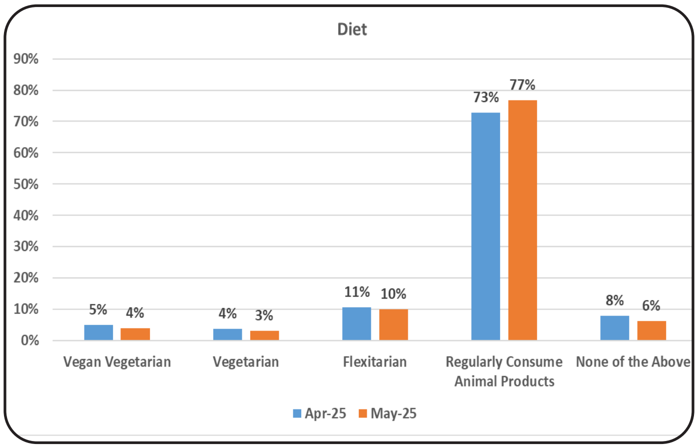
Additional MDM Project details are available at: https://www.agmanager.info/

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 May, 77% 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.

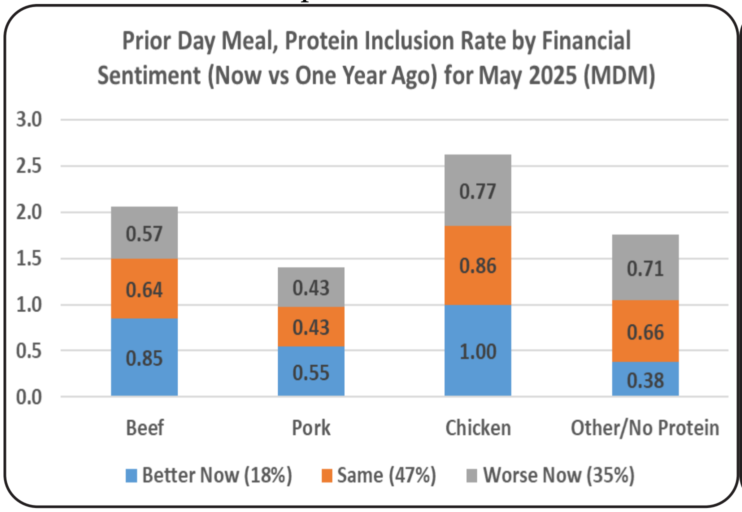


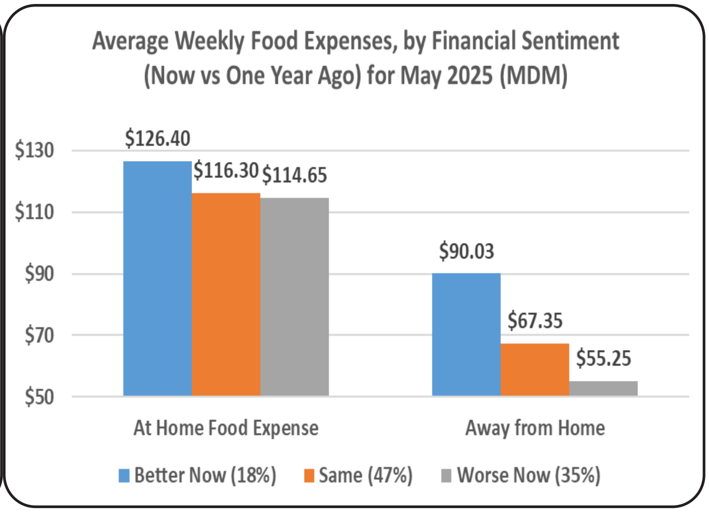


Ad Hoc Questioning

In May, 18% indicate their household finances are better than one year earlier (on par with 18% in April). 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%) or worse (35%) financial conditions.

Those reporting improving finances in May have higher food spending both at-home and away-from-home with the relative differences in expenditures being much higher away-from-home. Combined, these trends highlight evolving meat consumption rates, meal-destination and market channel implications of broader macroeconomic developments of elevated interest here in 2025.





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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

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.

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