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
Mar-25 WTP ($/lb)	$17.86	$9.02	$7.34	$6.40	$8.89	$8.00	$9.41	$3.45	
Market Share	8%	24%	13%	8%	27%	2%	4%	7%	6%
Apr-25 WTP ($/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%

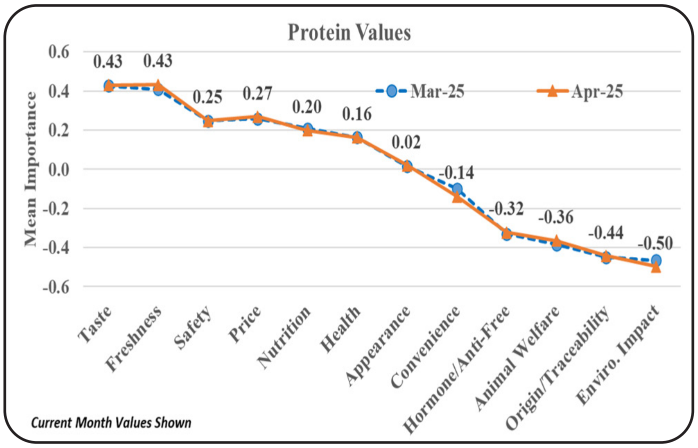
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-25 WTP ($/meal)	$27.74	$21.65	$16.86	$19.47	$19.01	$12.20	$18.30	$20.23	
Market Share	15%	28%	5%	10%	14%	3%	12%	9%	5%
Apr-25 WTP ($/meal)	$27.86	$21.42	$16.61	$19.22	$18.79	$12.39	$18.78	$19.88	
Market Share	15%	26%	5%	10%	14%	3%	13%	8%	5%

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

The combined beef and pork projected market shares for April are 33% 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, nationally there are 43% 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 since March likely reflecting ongoing macroeconomic developments.



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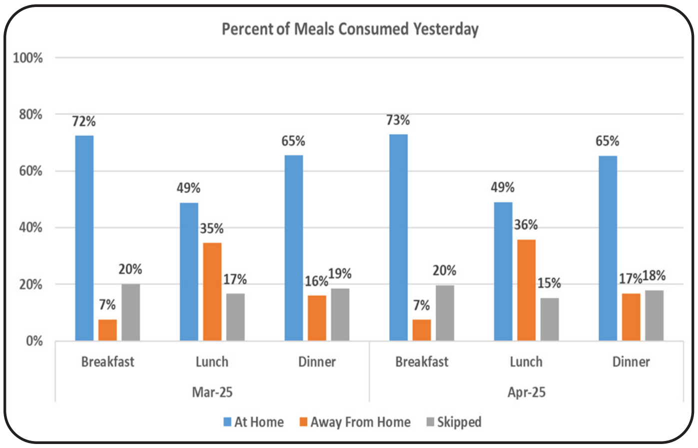
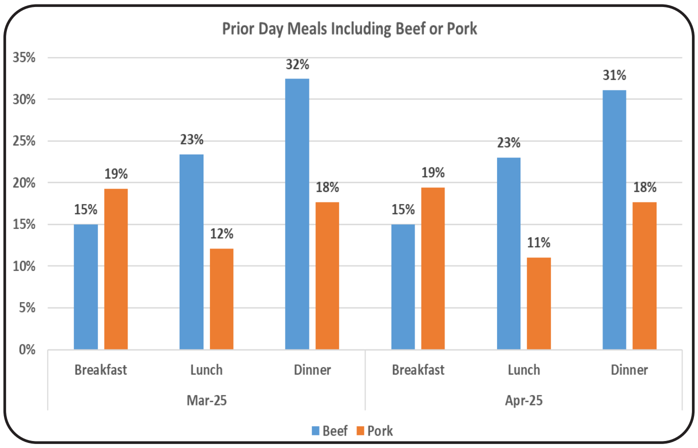
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 65% consumed breakfast, lunch, and dinner at home in April with breakfast and lunch meals being higher than in March indicating less restaurant foot-traffic. An increase in reported skipped meals remains worth monitoring. In April, 15%, 23%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 11%, and 18% of these meals.

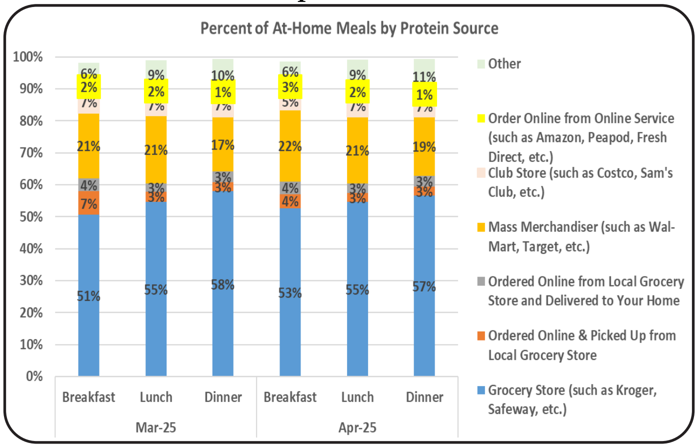


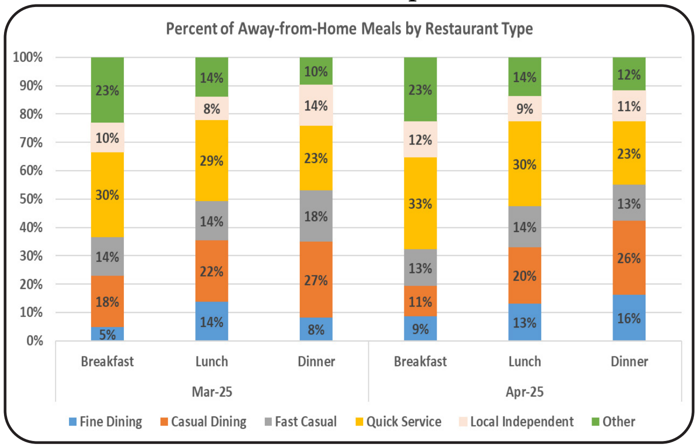


Prior Day Meals: At-Home Protein Source & Restaurant Type

In April, 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 56%, 65%, and 61% of breakfast, lunch, and dinner meals in April.





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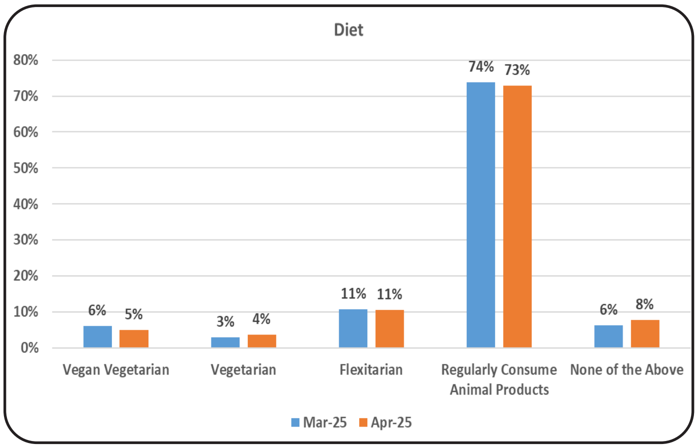
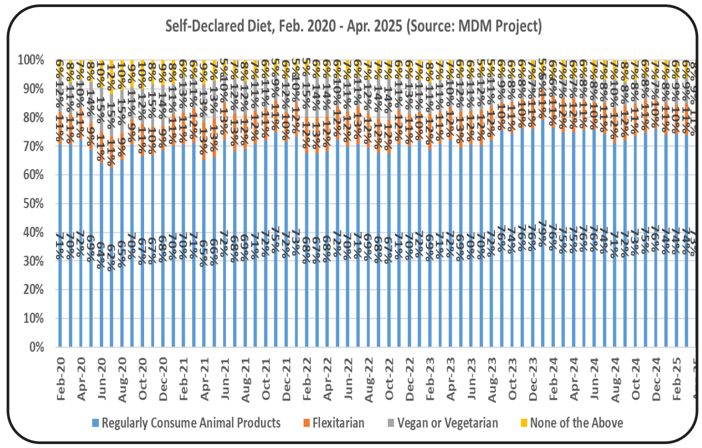
Meat Knowledge & Personal Diet

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 April, 73% 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 Feb. 2020 to Apr 2025 period there is a small upperward trend in rate of "regularly consume animal products" self-declarations.

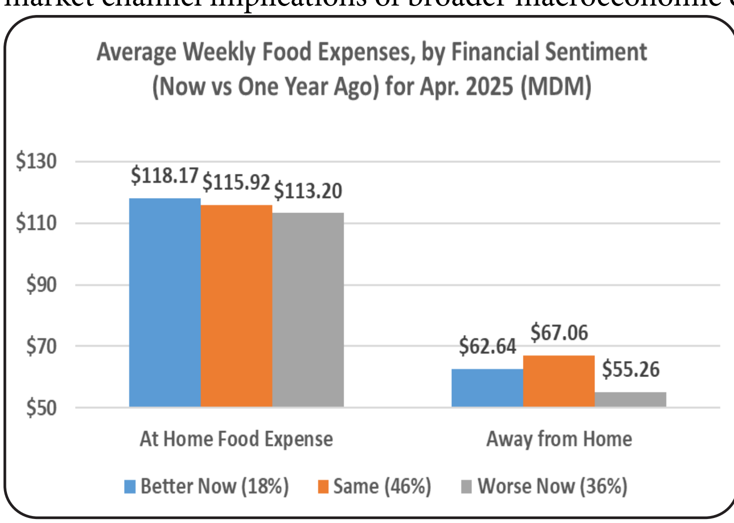


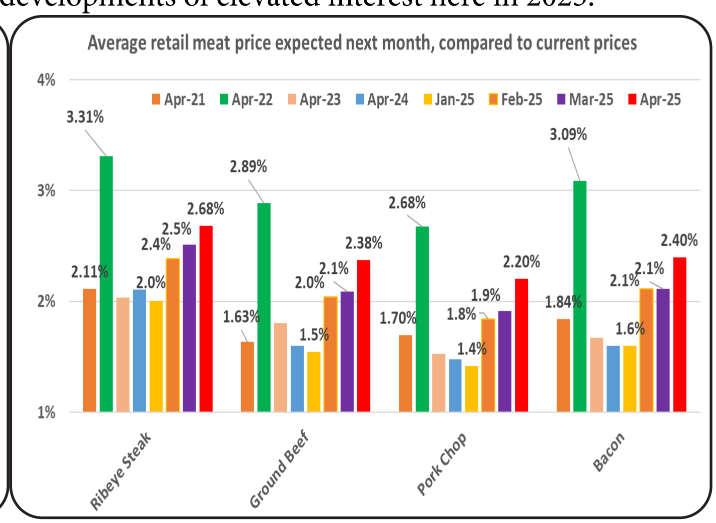


Ad Hoc Questioning

In April, 18% indicate their household finances are better than one year earlier (down from 20% in March). 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 (46%) or worse (36%) financial conditions.

Compared to March, those reporting improving finances in April notably reduced spending on food away from home ($63/week in April vs $88/week in March). This likely also reflects ongoing increases in meat price inflation expectations shown below. Combined, these trends highlight evolving 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

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