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
Jul-25	WTP ($/lb)	$17.32	$8.87	$7.13	$6.22	$8.73	$7.68	$9.62	$3.42	
	Market Share	7%	25%	12%	8%	28%	2%	4%	7%	6%
Aug-25	WTP ($/lb)	$17.98	$9.14	$7.23	$6.17	$8.97	$8.40	$9.97	$3.80	
	Market Share	8%	24%	12%	8%	27%	2%	5%	8%	6%

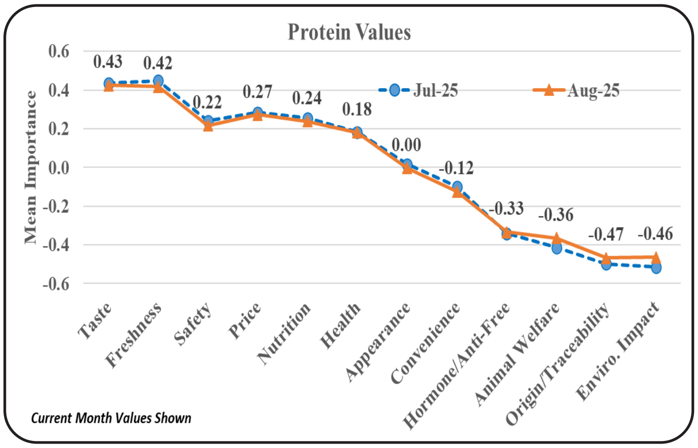
FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jul-25	WTP ($/meal)	$27.31	$20.63	$16.67	$18.87	$18.87	$12.76	$18.25	$20.01	
	Market Share	15%	26%	5%	10%	15%	3%	12%	9%	5%
Aug-25	WTP ($/meal)	$27.86	$22.47	$17.00	$19.42	$19.40	$13.00	$18.57	$19.40	
	Market Share	14%	28%	5%	10%	14%	4%	12%	8%	5%

Willingness-to-pay (WTP) increased on seven evaluated Retail products in August compared to July. WTP also increased on seven evaluated Food Service dinner meals in August.

The combined beef and pork projected market shares for August are 33% and 20%, 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.



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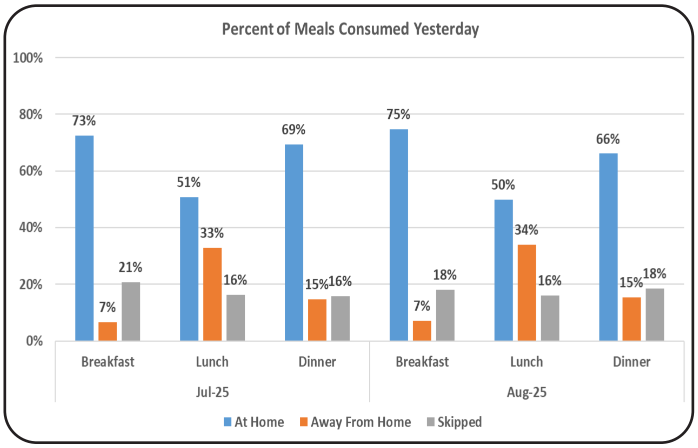
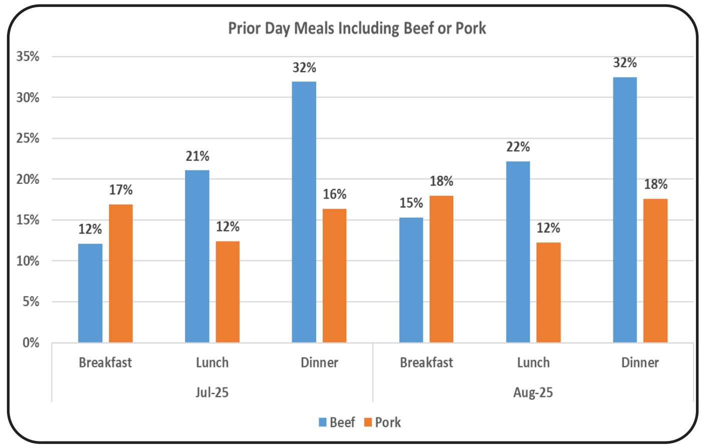
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 75%, 50%, and 66% consumed breakfast, lunch, and dinner at home in August. In August, 15%, 22%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 18% of these meals.

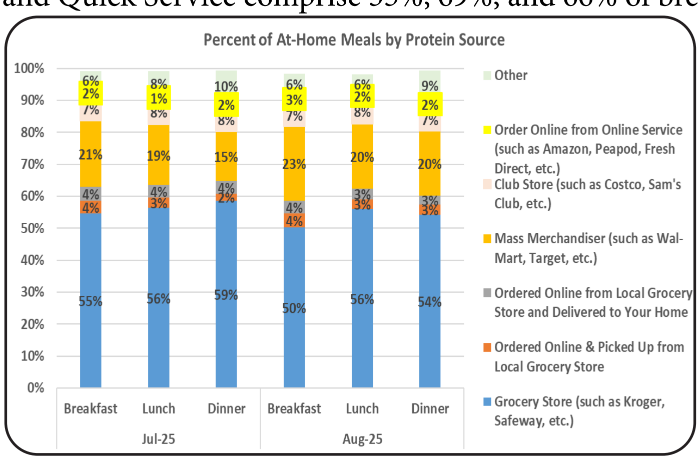


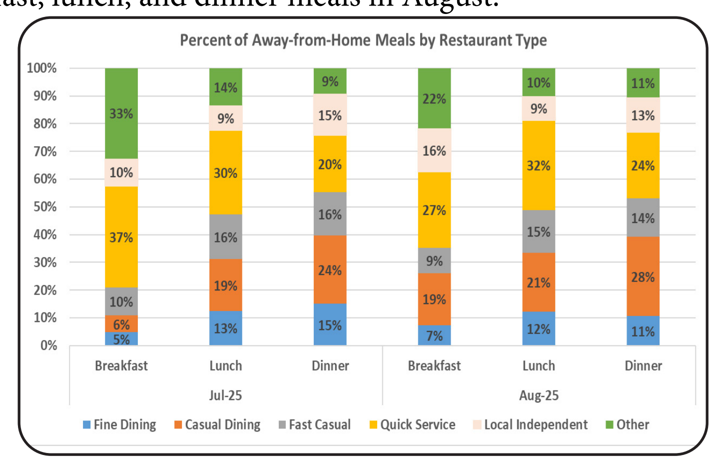


Prior Day Meals: At-Home Protein Source & Restaurant Type

In August, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 30%, 28%, and 28% 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 55%, 69%, and 66% of breakfast, lunch, and dinner meals in August.





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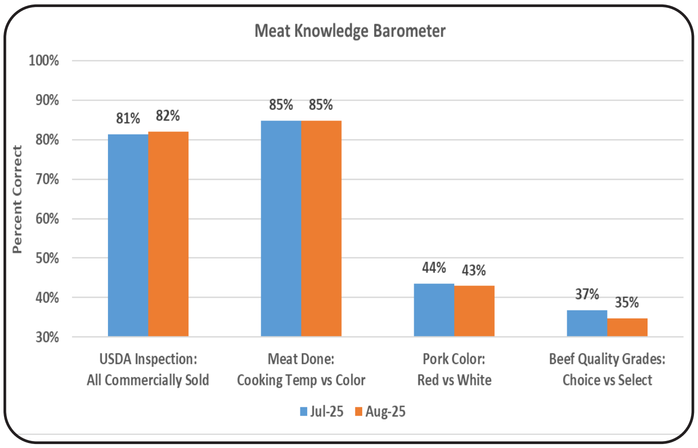
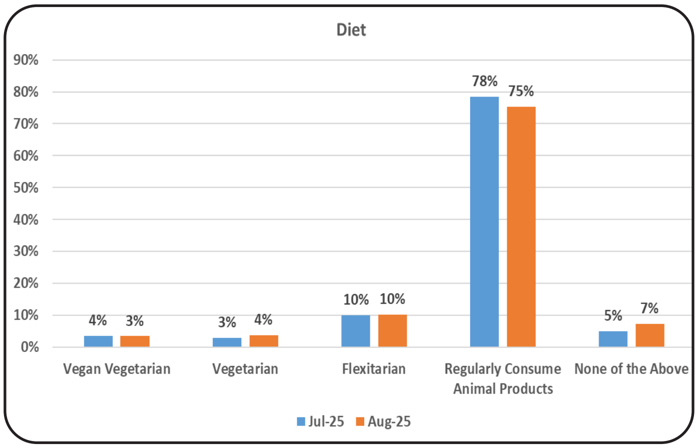
Additional MDM Project details are available at: https://www.agmanager.info/

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 August, 75% 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.

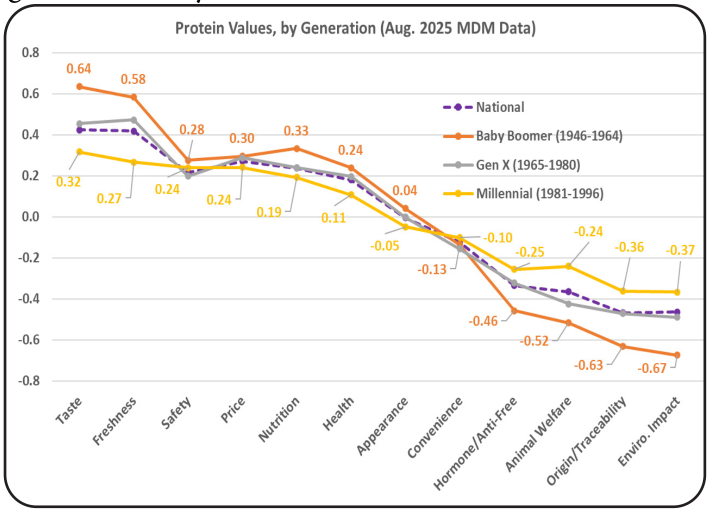




Ad Hoc Questioning

As shown in a couple past base MDM reports, the national summary of Protein Values shown above can mask generational differences.

The order of importance is generally the same across generations while the relative importance of examined factors varies. Baby Boomers place much higher relative weight on Taste and Freshness compared to younger generations (see steeper orange line). While Taste and Freshness persist as leading considerations, Gen X and Millennial respondents are more willing to trade-off those attributes for considerations such as Environmental Impact or Origin/Traceability (hence the flatter lines).



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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