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
Jun-25	WTP ($/lb)	$17.62	$8.82	$7.13	$6.19	$8.55	$8.34	$9.61	$3.40	
	Market Share	8%	25%	13%	8%	27%	2%	4%	7%	6%
Jul-25	WTP ($/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%

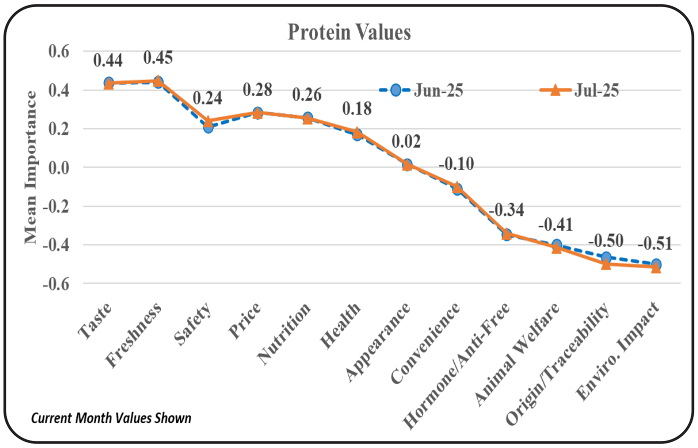
FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jun-25	WTP ($/meal)	$26.17	$20.02	$15.91	$17.67	$18.04	$12.76	$17.49	$19.01	
	Market Share	14%	27%	5%	9%	15%	4%	12%	8%	6%
Jul-25	WTP ($/meal)	$27.31	$20.63	$16.67	$18.87	$18.87	$12.76	$18.25	$20.01	
	Market Share	15%	26%	5%	10%	15%	3%	12%	9%	5%

Willingness-to-pay (WTP) increased on six evaluated Retail products in July compared to June. WTP increased on all eight evaluated Food Service dinner meals in July.

The combined beef and pork projected market shares for July are 32% and 20%, respectively at the grocery store and 41% and 14% at the restaurant.

Protein Values

Freshness, Taste, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 45% more considering Freshness a top-4 factor (of 12 examined) than considering Freshness a bottom-4 purchasing factor.



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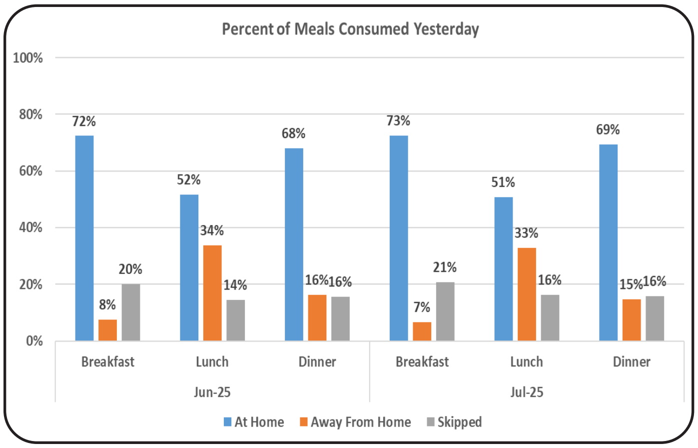
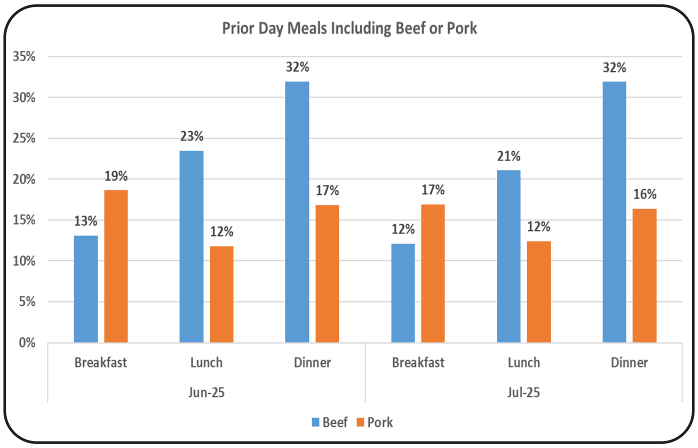
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 51%, and 69% consumed breakfast, lunch, and dinner at home in July with reported rates of skipping meals (particularly lunch) up compared to June. In July, 12%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 12%, and 16% of these meals.

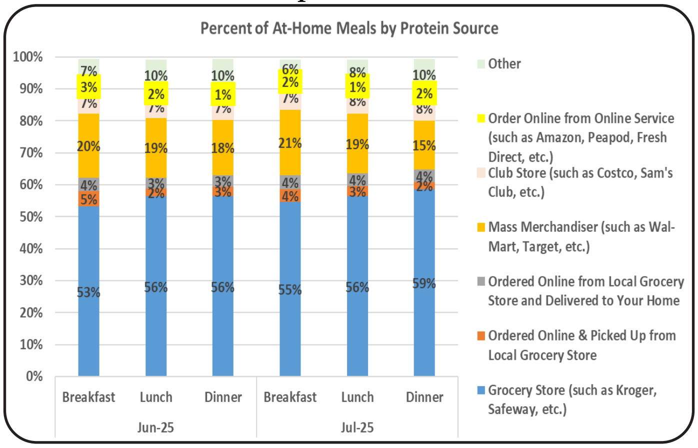


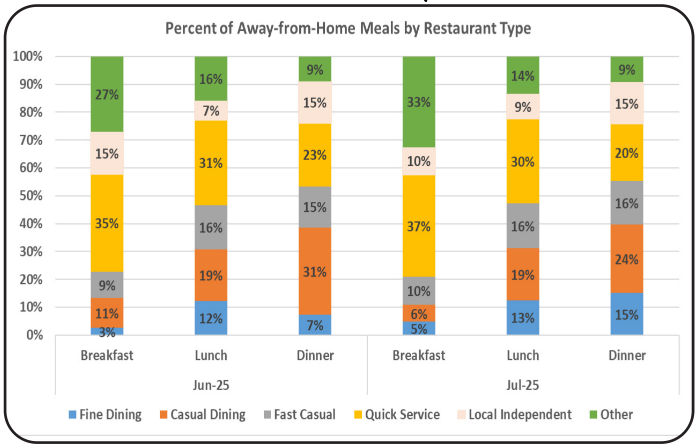


Prior Day Meals: At-Home Protein Source & Restaurant Type

In July, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 28%, 27%, and 23% 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 53%, 65%, and 61% of breakfast, lunch, and dinner meals in July.





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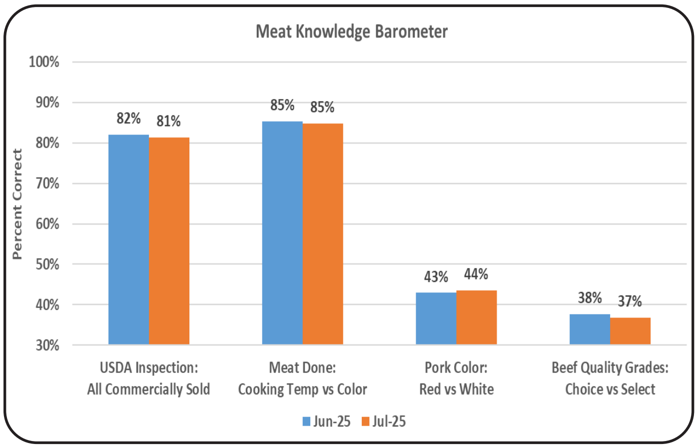
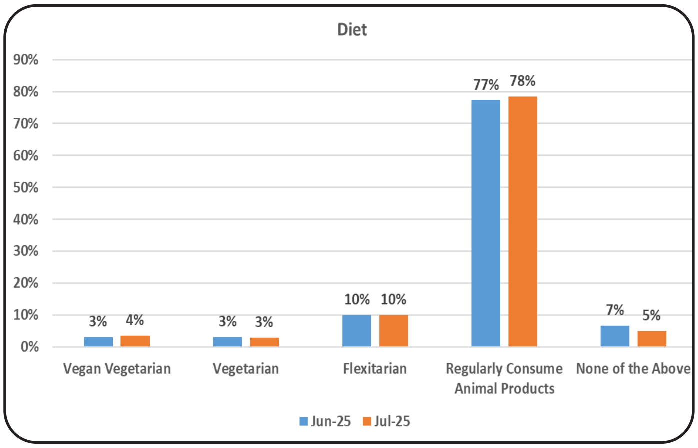
Additional MDM Project details are available at: https://www.agmanager.info/

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 July, 78% 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.



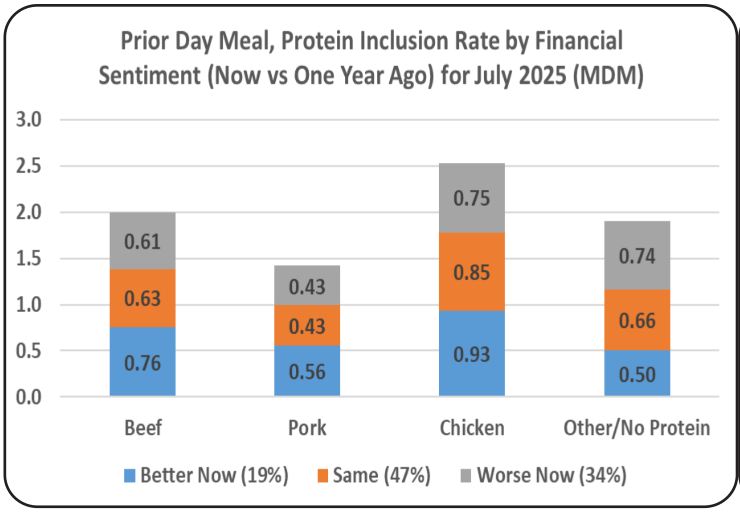


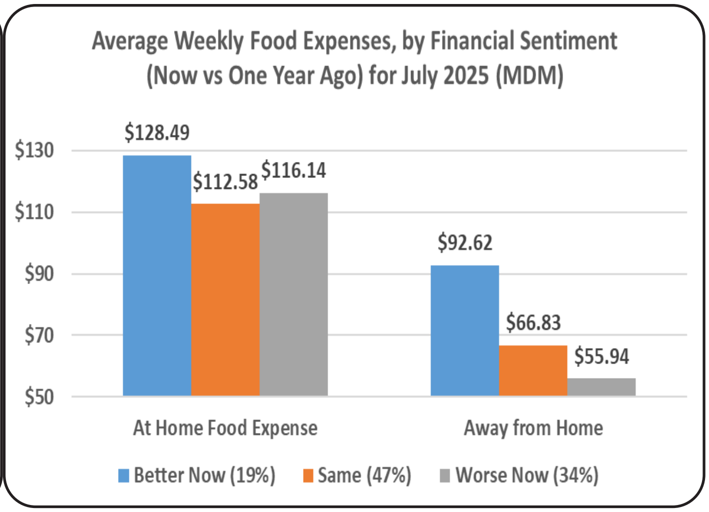
Ad Hoc Questioning

In July 19% indicate their household finances are better than one year earlier (on par with 19% in June).

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 (34%) financial conditions.

Those reporting improving finances in July have higher food spending, particularly away-from-home. Combined, these trends continue to reinforce meat consumption rates, meal-destination and market channel implications of broader macroeconomic developments as the third quarter of 2025 begins.





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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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