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
May-25	WTP ($/lb)	$17.73	$9.09	$7.28	$6.25	$8.80	$8.13	$10.33	$3.46	
	Market Share	8%	25%	12%	8%	27%	2%	5%	7%	6%
Jun-25	WTP ($/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%

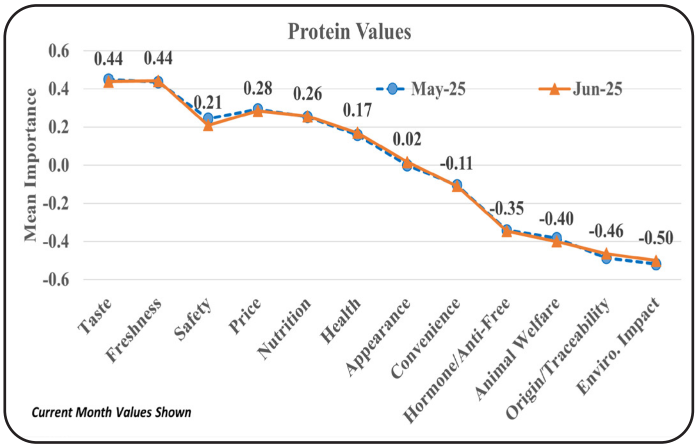
FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
May-25	WTP ($/meal)	$26.56	$20.27	$16.06	$18.20	$18.41	$12.68	$17.74	$19.48	
	Market Share	14%	26%	5%	9%	15%	4%	12%	9%	5%
Jun-25	WTP ($/meal)	$26.17	$20.02	$15.91	$17.67	$18.04	$12.76	$17.49	$19.01	
	Market Share	14%	27%	5%	9%	15%	4%	12%	8%	6%

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

The combined beef and pork projected market shares for June are 33% and 20%, respectively at the grocery store and 41% and 13% 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 44% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor.



Meat Demand Monitor
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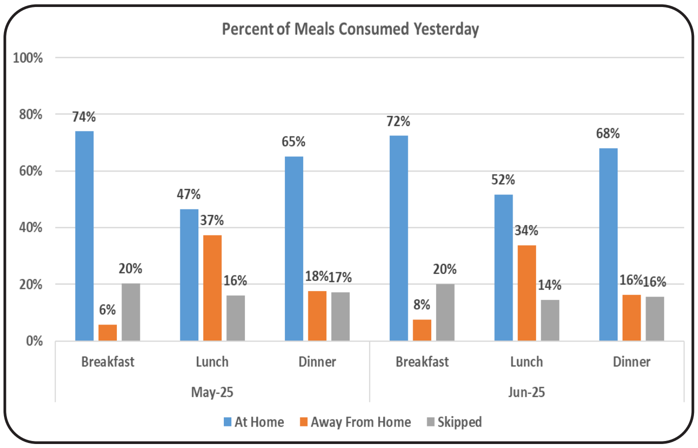
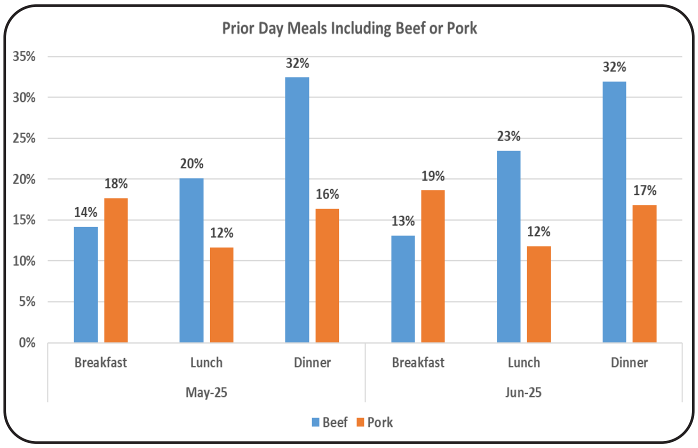
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 72%, 52%, and 68% consumed breakfast, lunch, and dinner at home in June with both lunch and dinner being higher than in May indicating less restaurant foot-traffic. In June, 13%, 23%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 17% of these meals.

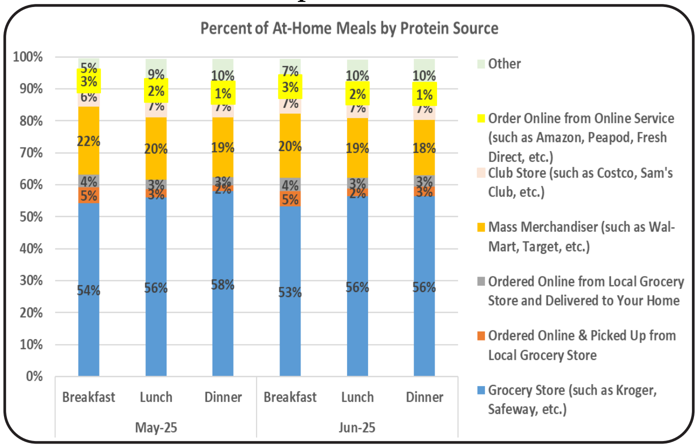


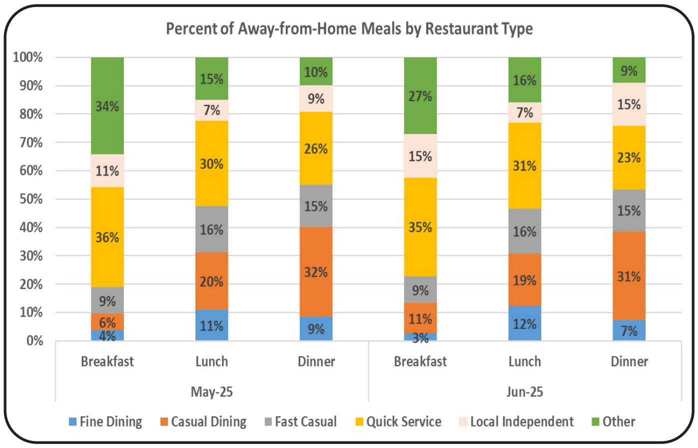


Prior Day Meals: At-Home Protein Source & Restaurant Type

In June, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 27%, 25%, 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 55%, 65%, and 69% of breakfast, lunch, and dinner meals in June.

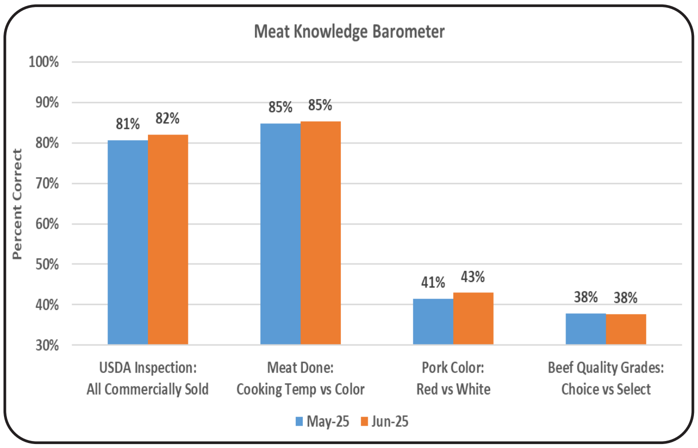


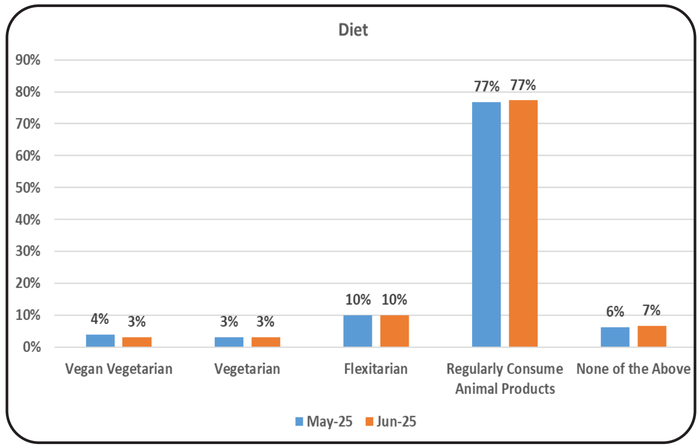


Meat Knowledge & Personal Diet

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 June, 77% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 6% indicate they are either Vegan Vegetarian or Vegetarian.



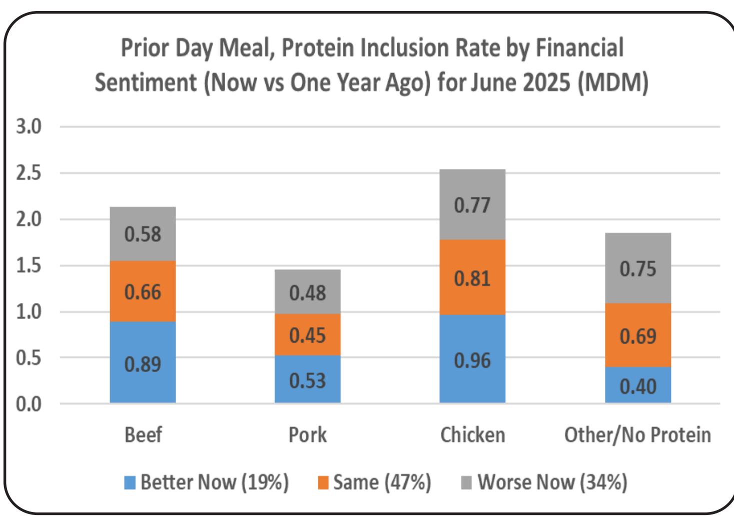


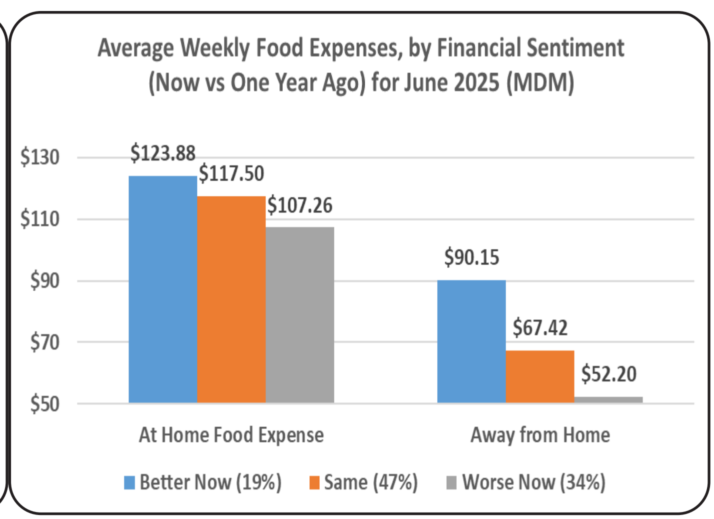
Ad Hoc Questioning

In June 19% indicate their household finances are better than one year earlier (slightly above 18% in May).

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 June have higher food spending, particularly away-from-home. Combined, these trends reinforce meat consumption rates, meal-destination and market channel implications of broader macroeconomic developments as we move to the second half of 2025.





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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