

Beef on US Menus

Research conducted by
Menu Matters 2025
On behalf of MLA



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Methodology

- Analysis combines Menu Matters proprietary trend intelligence with Menu Data menu database that captures approximately 3,000 US restaurants and around 10 million menu items
- 2021 benchmarks reference Datassential. Numbers reflect menu callouts/mentions only – not shipments or sales through the value chain.
- All measures are penetration/incidence on menus (e.g., % of restaurants menuing at least one item featuring [protein]), unless otherwise noted.
- Use insights directionally to shape operator conversations and menu development; not to infer volume.



US Foodservice Context

↘ **Pressures:** Staffing, availability/consistency, input costs, menu streamlining, slower innovation

↗ **Tailwinds:** Multi channel offerings, menu optimisation, format/footprint innovation in some segments

In a tighter operating environment, proteins need a clearer value story:

- **Grassfed** supports credible premium
- **Wagyu** supports indulgence/occasion led trade up

2026 Menu Matters Consumer Need States

These consumer needs states explain what US diners are looking for from food experiences in 2026 and provide context for how proteins can be positioned on menu

1. Real Food, Real Stories

Consumers want food that feels authentic, human-made, and grounded in real ingredients, not overly processed or ambiguous.

2. Simplify My Life

Consumers are overwhelmed by information overload (74GB/day). They want clarity, transparency, and reduced complexity in choices.

3. Make My Experiences Meaningful

People increasingly value connection, care and human touch in food experiences – what makes dining feel personal and memorable?

4. Help me Trust Again

Consumers crave credibility and reassurance from brands – accurate info, honest value and real benefits behind claims.

5. Reduce the Noise

Consumers want brands that cut through digital clutter and offer calm, confidence and focus in an overwhelming environment.



Grassfed Beef Implications?

- Aligns with trust, transparency and real food values supporting reassurance
- Provenance, welfare and clean-label cues reduce decision fatigue and strength credibility
- Familiar formats (e.g. burgers/sandwiches) make premium feel accessible
- Best framed everyday or approachable premium



Wagyu Beef Implications?

- Aligns with diners seeking indulgence and memorable dining experiences
- Marbling, craftsmanship and chef endorsements help justify premium pricing
- Clear definition and provenance critical where 'Wagyu' can be loosely understood
- Burgers support trial but centre of plate, dinner led dishes maximises premium value

Executive Summary + Key Insights

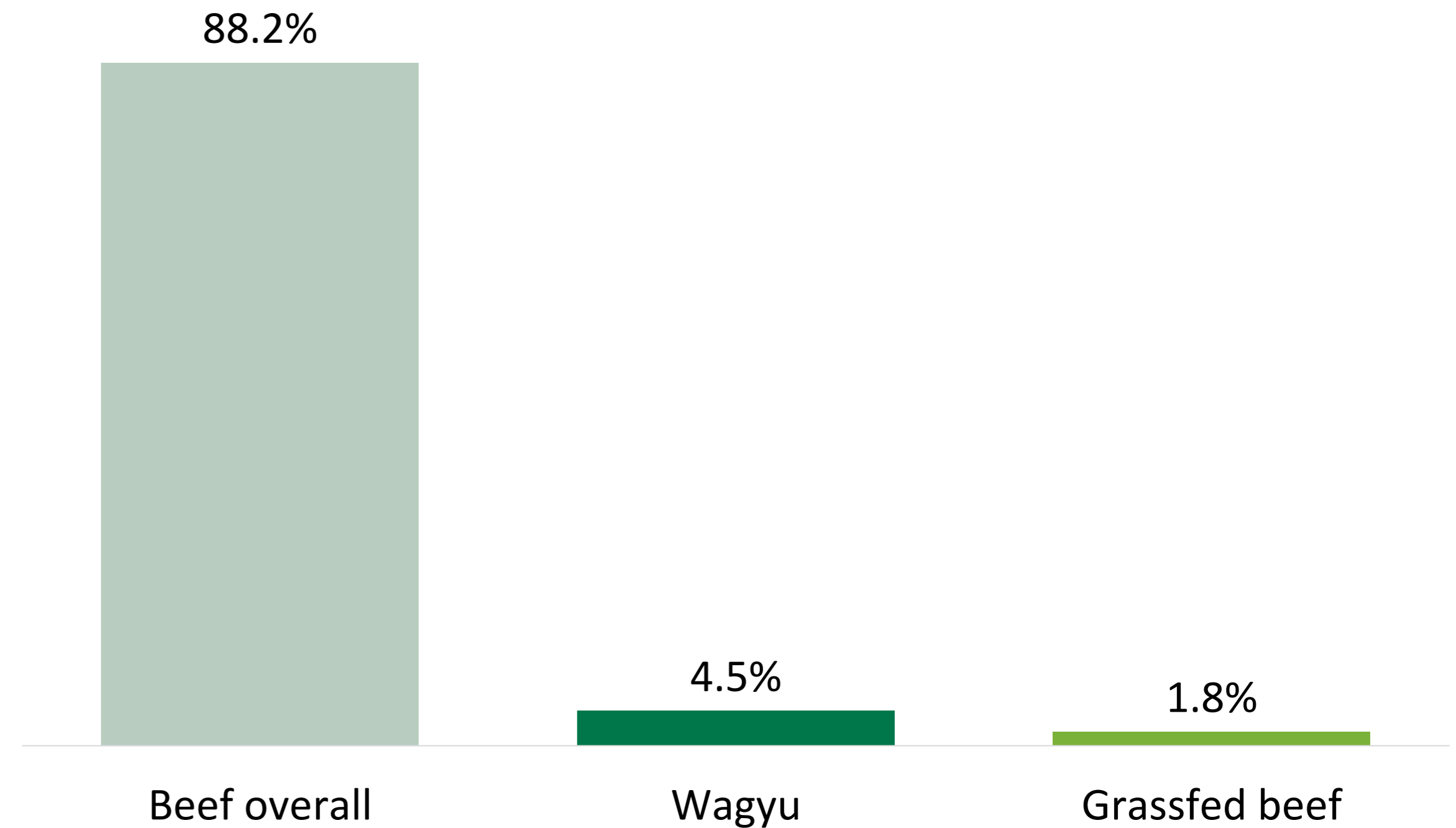
- Conventional beef remains widely present across US menus especially in lower-priced segments
- **Wagyu** and **grassfed** appear in mainstream concepts but each play a different premium role on menu
- **Wagyu** is more concentrated in premium, diner-led or chef-driven venues, especially in major metro markets
- **Grassfed** is a more familiar proposition, its barrier is price compared to conventional beef rather than low awareness
- **Grassfed** also has stronger assignment with sustainability, animal welfare and natural ingredient cues and is established in mainstream formats such as burgers, American and sandwich menus
- Burgers are a key gateway application for both **Wagyu** and **grassfed**, helping operators offer premium differentiation in familiar formats
- Australian origin remains under identified on menu, particularly for grassfed despite the likely stronger market presence than menu claim suggests

➔ **Opportunity:** Help operators translate Australian beef into clear menu value through provenance language, sustainability, animal welfare cues and menu-ready copy for familiar premium applications



Menu penetration narrows as beef positioning is more premium

Share of Restaurants Menuing (2025)



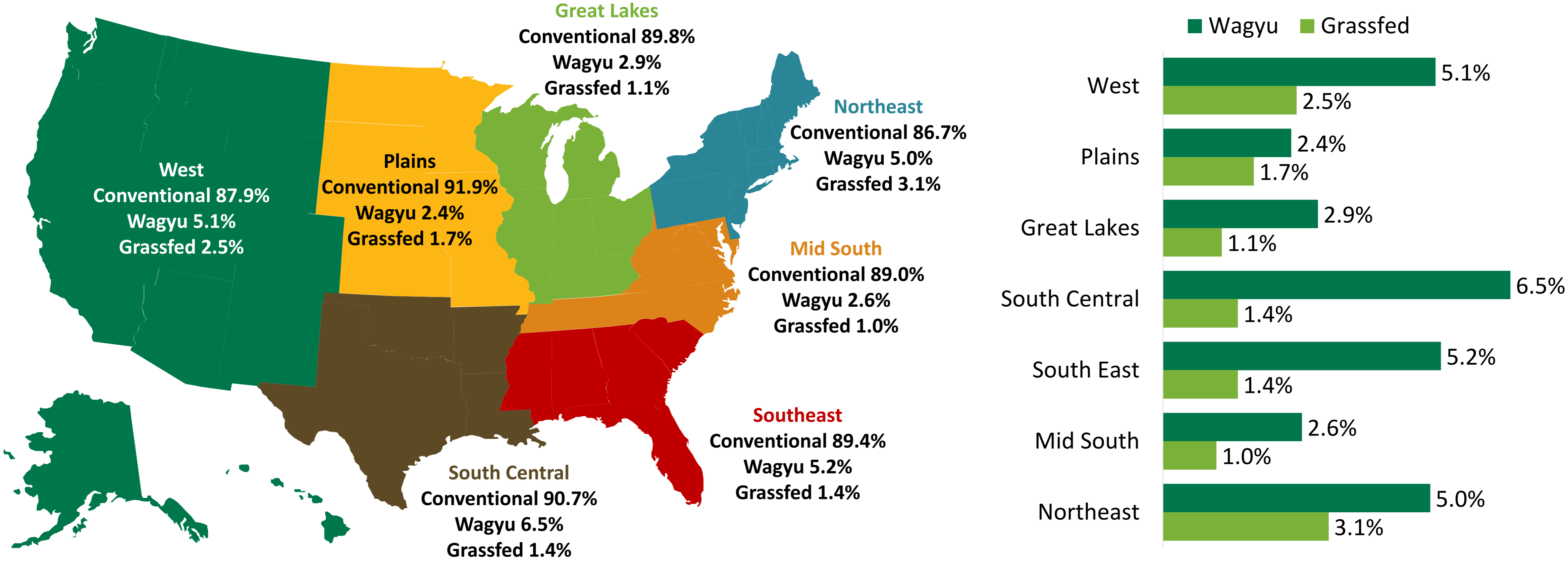
Wagyu plays a premium niche role while **grassfed** remains smaller but differentiated through familiar positioning rather than novelty

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef

 See **beef definitions** in the **Appendix**

Wagyu and grassfed show higher incidence in the Northeast and West; Wagyu driven by premium dining density and grassfed by sustainability/welfare cues

Share of Restaurants in each Region Menuing of Beef Types (2025)

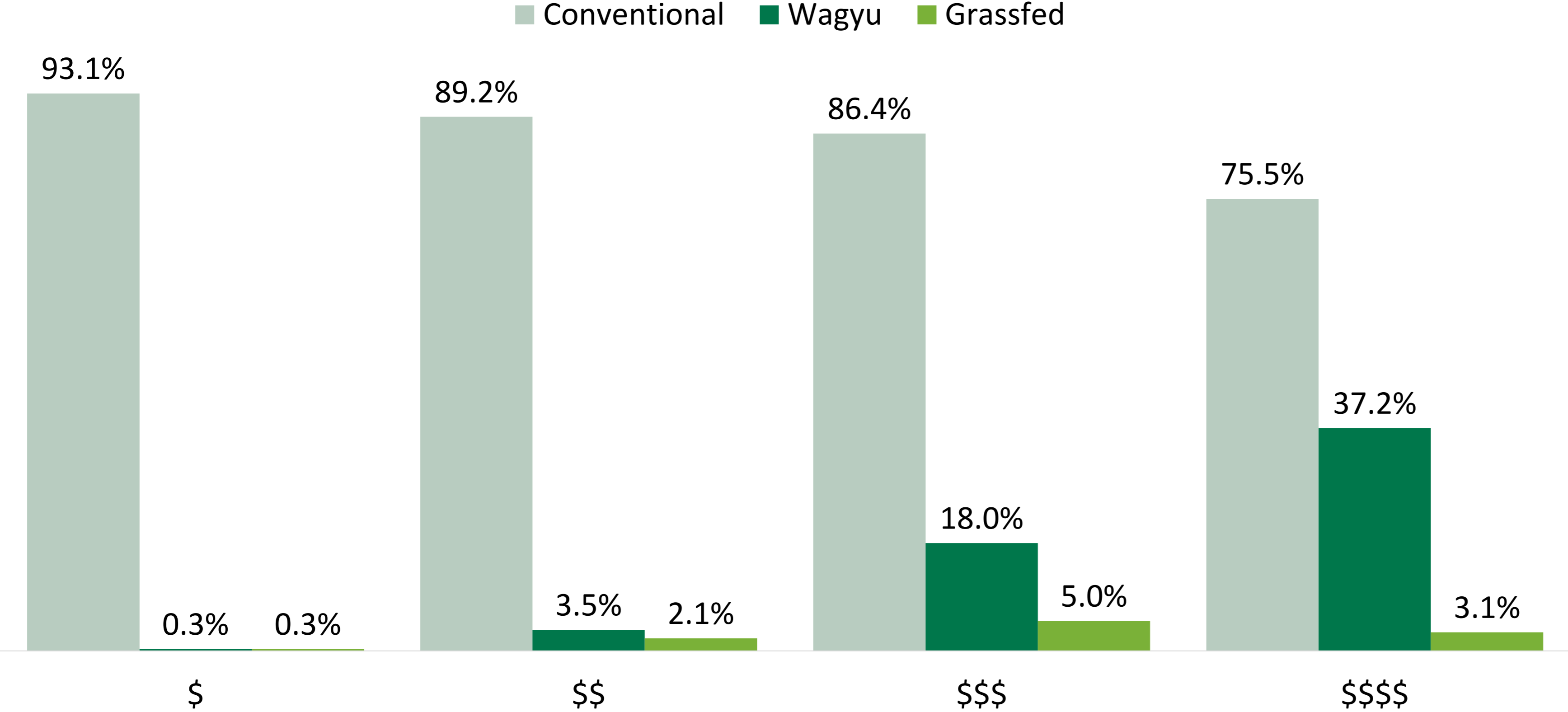


Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef

Beef types align differently with restaurant price tiers

Share of Restaurants by Price Point Menuing of Beef Types (2025)



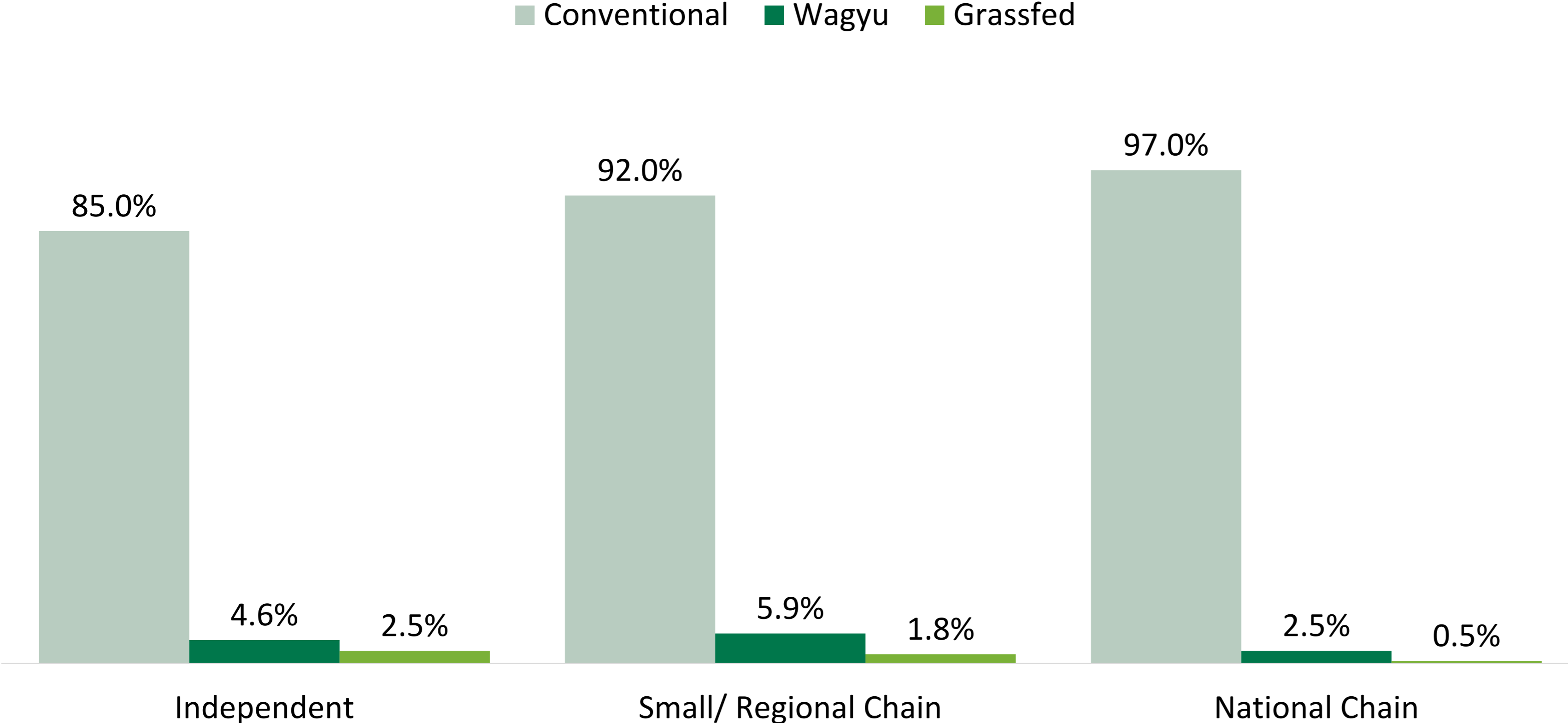
- **Conventional beef** appears across all price tiers, particularly prominent in lower-priced formats.
- **Wagyu** increases with price reinforcing its luxury and chef-led positioning
- **Grassfed beef** has shifted from fine dining toward casual dining, suggesting a move toward more accessible premium positioning, rather than a purely special occasion one

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef

 See restaurant definitions in the **Appendix**

Independent and small chains create space for Wagyu and grassfed differentiation

Share of Restaurants by Type Menuing of Beef Types (2025)



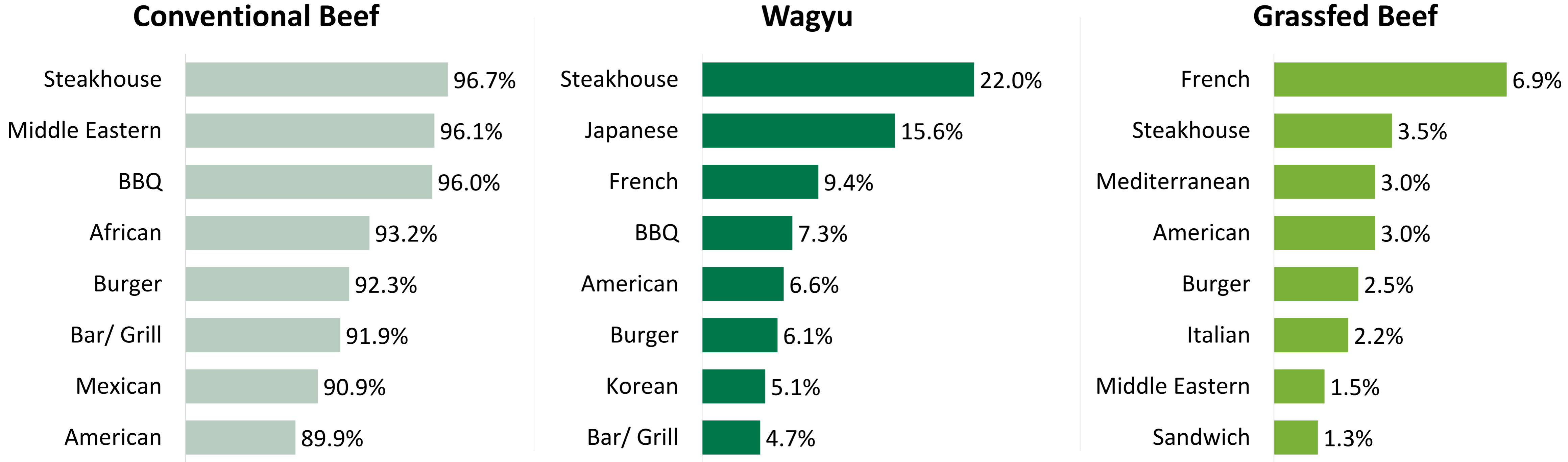
- **National chains** primarily feature conventional beef, reflecting scale, pricing, and supply needs.
- **Wagyu** and **grassfed beef** appear more often among independent and small/ regional chains, where operators use premium or differentiated beef to stand out; for **grassfed**, that differentiation is often built around ethics, ingredient quality and everyday premium cues

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef

 See **restaurant definitions** in the **Appendix**

World cuisines select beef type based on menu fit while steakhouse, American and burger formats create opportunity across beef types

Share of Restaurants by Menu Focus of Beef Types – Top Cuisines Types (2025)



Grassfed beef is not confined to cuisine-led niches (like lamb/goat) but appears across both niche and mainstream formats making it easier to scale through familiar usage occasions, while **Wagyu** remains more tightly tied to premium and cuisine-specific menu roles.

Source: Menu Matters MLA 2025 Menuing Report

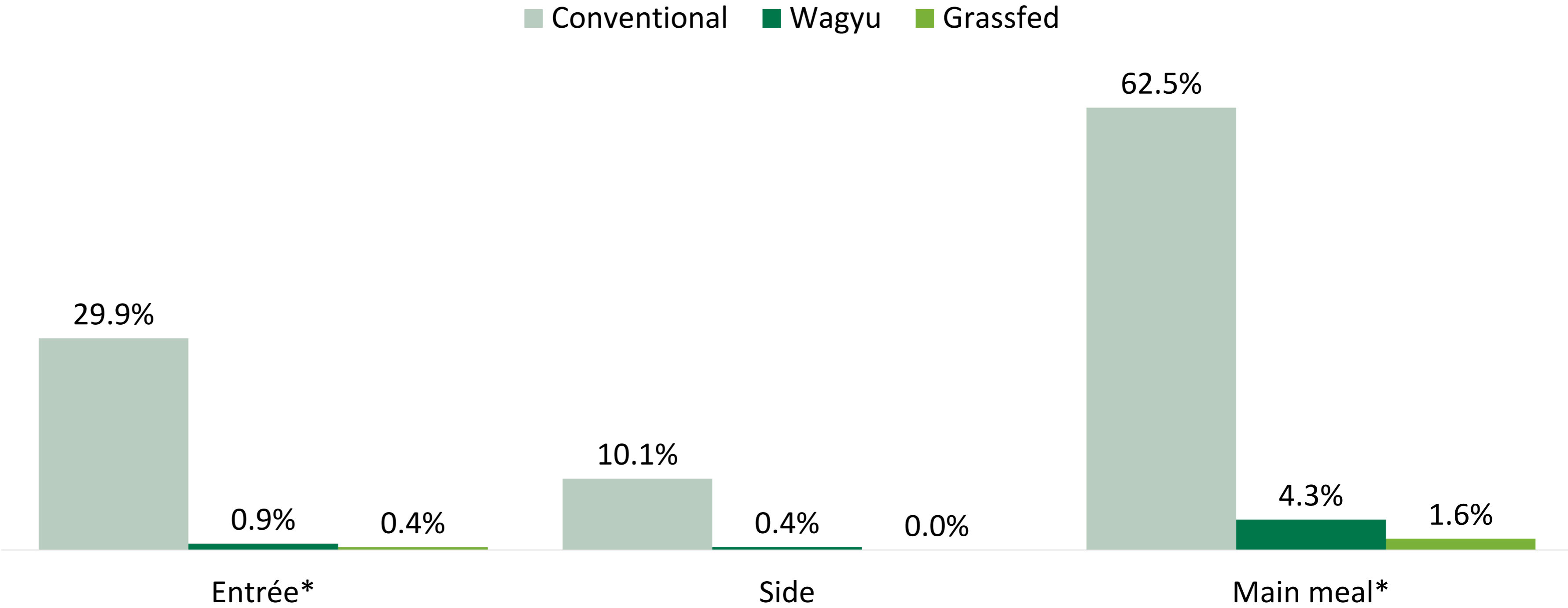
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef





Beef remains main meal-led across all beef types; entrées/sides offer future premium-trial potential

Share of Restaurants by Price Point Menuing of Beef Types (2025)



The key challenge for **Grassfed beef** is not boosting comfort for trial but using formats that make the premium feel justified and segment-appropriate

See menu terminology definitions in the Appendix

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef, *Entrée= Appetizer/Main meal=main entrée in original survey design

Wagyu is heavily concentrated at dinner while across beef types other dayparts remain largely underrepresented

Distribution of Items Featuring Beef Types by Daypart (2025)

■ Brunch/ Breakfast ■ Lunch ■ Dinner ■ Snack ■ Happy Hour ■ Late Night



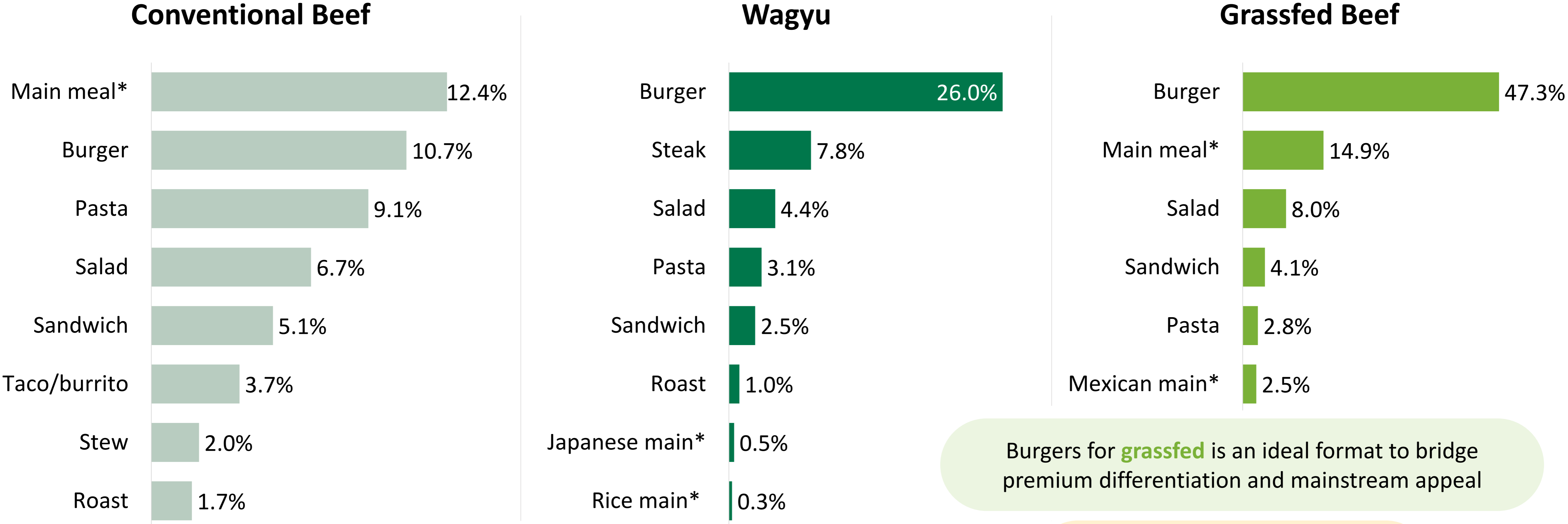
- **Wagyu** is concentrated at dinner, reinforcing its premium and occasion-led role
- **Grassfed** is nearly as likely to appear at lunch as it is dinner and is more present at brunch/breakfast than something like lamb or goat, pointing to broader versatility

Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef

Wagyu and grassfed beef are mostly featured as burgers – menu diversification will be key to driving future growth

Incidence of Beef Types by Item Type (2025)



Burgers for **grassfed** is an ideal format to bridge premium differentiation and mainstream appeal

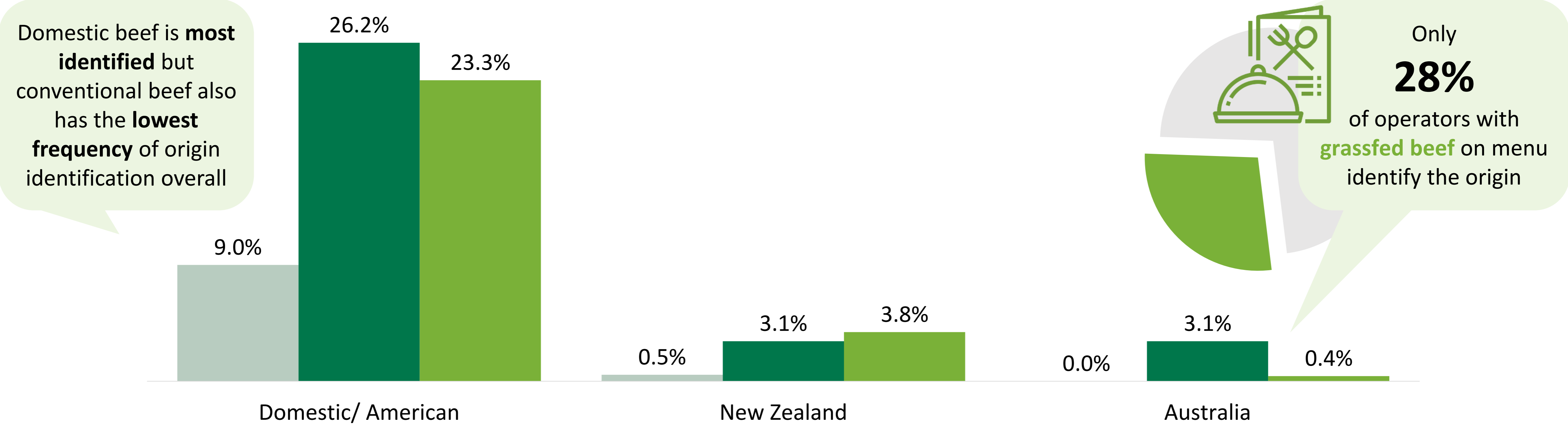
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Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring specified types of beef. *Main=entrée usage in original survey design

While origin is most often identified for Wagyu and grassfed beef, Australia remains under-represented relative to likely market presence

Penetration of Origin Among Operators Menuing Beef Types (2025)

■ Conventional ■ Wagyu ■ Grassfed



➔ **Opportunity:** Improve Australian identification through clearer provenance language and menu-ready origin storytelling

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration here is across all operators currently menuing at least one item with each type of beef. For example, 23.3% of operators with grassfed beef on the menu identify that grassfed beef as “domestic” or “American”; This is based solely on menu call outs and identification on the menu and is not sales or shipment data which may tell a far different story regarding penetration of Australian beef in the U.S. foodservice market.

Appendix



Beef Type, Meal Part and Restaurant Type Definitions

Beef Type Definitions

- **Conventional beef:** corn-fed beef and beef that is undefined on menus (identified as 'beef') or all other beef excluding grassfed and Wagyu
- **Wagyu:** items explicitly identified as Wagyu on menu
- **Grassfed beef:** menu items explicitly labelled grassfed

Meal Part Definitions

- **Appetizers:** Small or shareable plates offered before the entrée, may also be called small plates, starters, hors d'oeuvres or entrées in Australia
- **Entrees:** The main meal portion, main course or large plate option on a menu, often featuring a center-of-plate protein but may also feature handhelds, burgers, sandwiches, large salads, etc. It is the 'main' in Australia

Restaurant Type Definitions

- **Independents:** Operations with only 1 to 3 units, most often in a small geographic footprint
- **Small/regional chains:** Operators with 4 to 50 units that may stretch across one or two contiguous regions
- **National chain:** Over 50 units with chains distributed across the country, though not necessarily present in every state or region



Restaurant Segment Definitions

- **Quick service (\$):** traditional fast-food restaurants, typically offering food at the lowest price point across segments with an emphasis on counter, takeout, drive thru and delivery
- **Fast casual (\$\$):** operators that are at a slightly higher price point than quick service, often emphasize health and/ or premium quality, with a greater emphasis on on-site dining in addition to counter and delivery
- **Midscale (\$\$\$):** Table-service restaurants often with an emphasis on breakfast and no alcohol though many global cuisine operators without alcohol will also fall into this segment
- **Casual dining (\$\$\$\$):** Table-service restaurants often with an emphasis on bars and alcohol programs, typically do not offer breakfast
- **Fine dining (\$\$\$\$\$):** White tablecloth, table-service restaurants with an emphasis on dinner programs and least likely to offer delivery or to-go programs

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