US Foodservice Beef Insights

Global Market Insights | May 2025

Derived from Aussie Beef Activity Chef Survey conducted in Feb 2025

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Key Findings

- 542 chefs across the USA (skewed to medium to high-end segment and across a wide range of cuisines) surveyed
- Ribeye was identified as the most preferred beef cut among chefs, followed by striploin and tenderloin
- When ranking countries of origin for beef, chefs showed the strongest preference for local (USA) products, with Australian beef ranked second
- Grassfed beef is most used in steak and grilled dishes, though braising and tartare are also popular preparations
- While 45% of chefs have used Australian grassfed beef on their menus, only 30% use it either sometimes or always
- The main challenges chefs face in sourcing Australian grassfed beef include limited availability, pricing concerns, and a restricted range of cuts

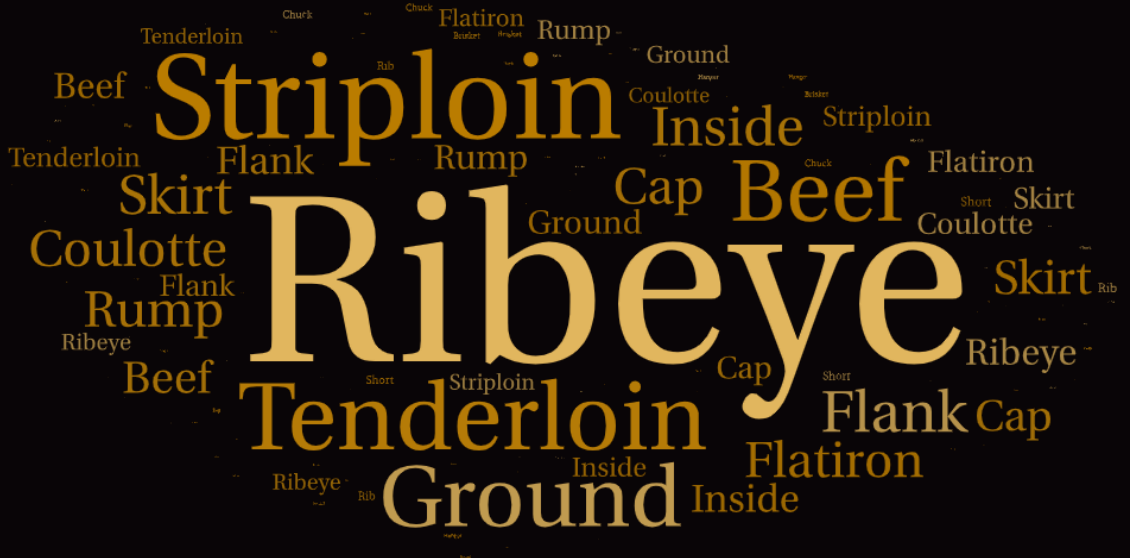
Survey Background

As part of the in market promotional activity for Aussie Beef, MLA conducted an in-market recipe contest through StarChefs (www.starchefs.com), who serve as a community, resource, and platform for restaurant professionals, agency and facilitates relationships between foodservice brands and industry professionals. StarChefs used their network attracting 542 chefs across the USA to participate in the contest as well as provide insights into a few key questions.

The group of participants is *not* representative of the total US foodservice market but skewed to *medium to higher end segment*. Participants were made up of a range of chefs that serve a wide range of cuisines including New American (23%), Global (19%) and Italian (8%), across independent operators (34%), multi-unit restaurant groups (23%), hotels (9%), education (8%), and private catering (8%).

Ribeye is the top choice among surveyed chefs, followed by striploin and tenderloin

What cut(s) of beef do you typically prefer to use/purchase for your restaurant's menu?



Source: MLA StarChef Survey Feb 2025 – Q: What cut(s) of beef do you typically prefer to use/purchase for your restaurant's menu? Select all that apply.

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COO Preference for Beef for Restaurant

1. Local (USA)
2. ***Australia***
3. Canada
4. New Zealand
5. Brazil

When purchasing beef, Australia is the second* highest preferred among the chefs in the survey, after USA product

*Source: MLA StarChef Survey Feb 2025 – Q: Rank your preferred country of origin when purchasing beef for your restaurant. *Results based on top 2 preference ranking.*

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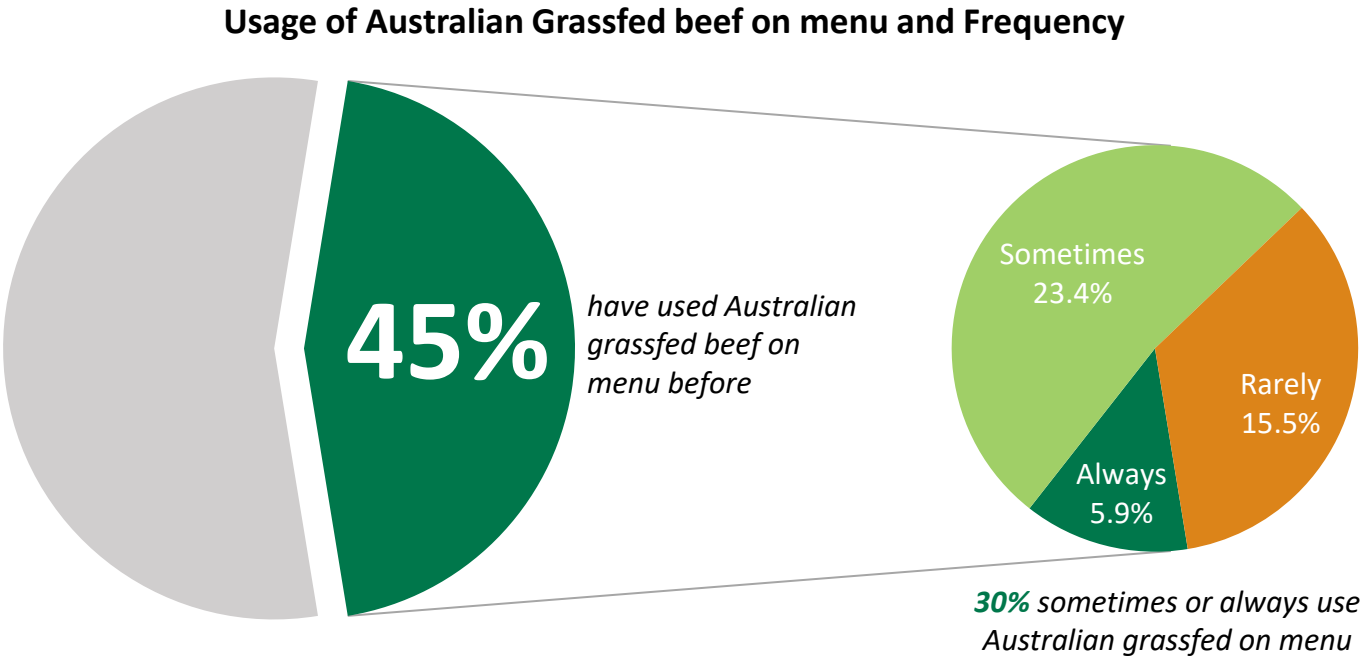
While steak or grill preparations remain the most popular, braising & tartare also enjoy significant popularity

What types of dishes do you typically like to prepare using grassfed beef?

Grill
Steak
Beef
Braised
Tartare
Boeuf
Burger
Pies
Fed
Sliced
Confit
Wagyu
Jus
Chili
Dish
Fries
Roast
Tallow
Verde
Love
One
Lots
Carved
Short
Rib
Pastrami
Bone-in
Saltado
Grassfed
Clean
Bistecca
Smoked
Shanks
Stuffed
Eggs
Two
Wine
Salsa
Lomo
Tenderloin
Ramen
Thai
Fresh
Seared
Modern
Striploin
Hanger
Asian
Menu
Keep
Typically
Red
Dinner
Showcase
Protein
Sauce
Cheek
Compound
Picanha
Kofta
Lense
Simply
First
New
Shortribs
Indian
Tendon
Hamburger
Technique
Beamaise
Caribbean
Currently
Powder
Smaller
Yakiniku
Bernaise
Milanese
Dumplings
Uahzing
Sous-vide
Better
Mashed
Kinds
Seak
Polve
Garlic-herb
Broccoli
Garlic
Familiar
Couliere
Chuck
Stands
Mushrooms
Coffee
Accompanied
Paninis
Miso
Enhance
Bone-in
Pastrami
Soft
Italian-style
Find
Special
Green
Influences
Ponzu
Herb-crusted
Regional
House
Crisp
Spin
Meatball
Dry
Dairy-based
Brassicas
Kibbe
Ravioli
Ribeye
Pho
Gnocchi
Offs
Cheddar
Mole
Ingredients
Root
Kebab
Katsu
Accentuate
Local
Puff
Towards
Everything
Pickled
Composed
Spiedini
Broiler
Bolognese
African
Otherwise
Etc
Thinly
Option
Sapaipillas
Simply
Lense
Familiar
Couliere
Chuck
Stands
Mushrooms
Coffee
Caribbean
Currently
Powder
Beamaise
Technique
Sage
Latin
Smashed
Grazie
Tagliata
Sach
Particularly
Aguachile
Quesadilla
Classic
Polenta
Filipino
Charcoal
Ranga
Healthy
Vegetarian
Yakiniku
Smaller
Yuzu
Crudo
Grits
Protein
Sauce
Cheek
Compound
Picanha
Kofta
Lense
Simply
First
New
Shortribs
Indian
Tendon
Hamburger
Brisket
Integrity
Sunchoke
Boulude
Koko
Garlic-herb
Broccoli
Garlic

While 45% of those surveyed have used Australian grassfed beef, under one third at least use it sometimes on menu



Source: MLA StarChef Survey Feb 2025 – Q: Have you ever used Australian grassfed beef on your menu? How frequently do you use Australian grassfed beef on your menu?

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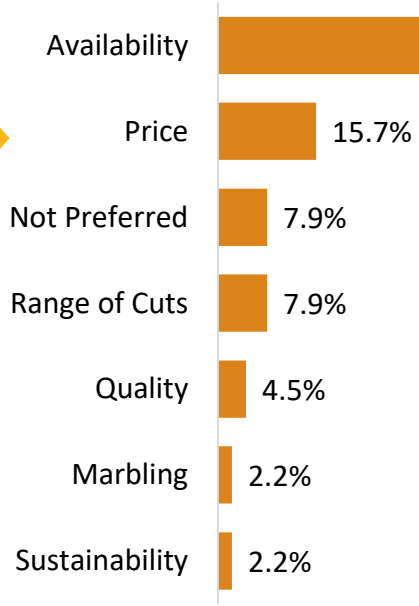
One third have challenges sourcing Australian grassfed beef facing issues of availability, price, and limited range of cuts

33%

have challenges sourcing Australian grassfed beef

Key challenges sourcing Australian grassfed beef



"Consistency in availability"

"…vendors did not always have Australian grassfed beef as an option, or the specific cuts I was looking to utilize"

Source: MLA StarChef Survey Feb 2025 – Q: Any challenges you face when sourcing Australian grassfed beef? Explain the challenges when sourcing Australian grassfed beef.

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