

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
Sep-25 WTP (\$/lb)	\$18.12	\$9.71	\$7.95	\$6.83	\$9.31	\$8.70	\$10.07	\$3.96	
Market Share	8%	25%	13%	8%	26%	2%	4%	8%	6%
Oct-25 WTP (\$/lb)	\$18.37	\$9.47	\$7.74	\$6.41	\$9.19	\$8.09	\$9.49	\$3.48	
Market Share	9%	25%	13%	8%	27%	2%	4%	7%	6%

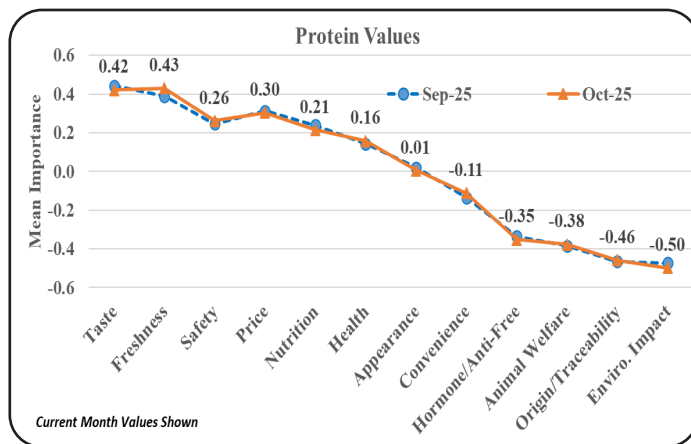
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Sep-25 WTP (\$/meal)	\$27.18	\$21.27	\$16.73	\$18.71	\$18.94	\$13.30	\$17.98	\$19.97	
Market Share	14%	28%	5%	9%	15%	4%	12%	9%	5%
Oct-25 WTP (\$/meal)	\$28.40	\$22.07	\$16.88	\$19.89	\$19.63	\$13.26	\$19.19	\$20.31	
Market Share	15%	27%	4%	10%	15%	3%	12%	8%	4%

Willingness-to-pay (WTP) decreased on seven evaluated Retail products in October compared to September while WTP increased on seven evaluated Food Service dinner meals.

The combined beef and pork projected market shares for October are 34% and 21%, respectively at the grocery store and 43% and 14% at the restaurant.

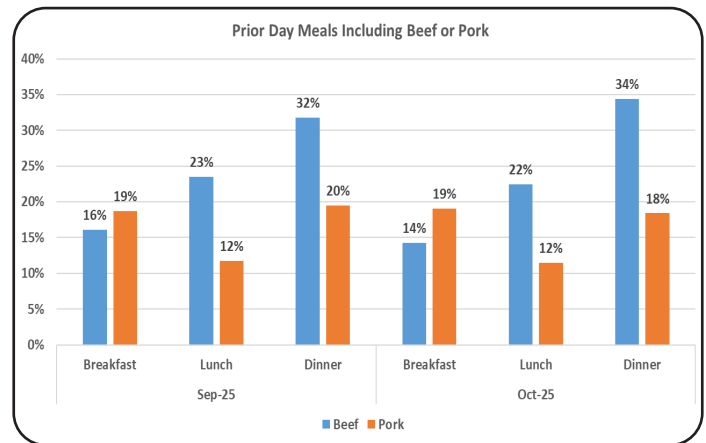
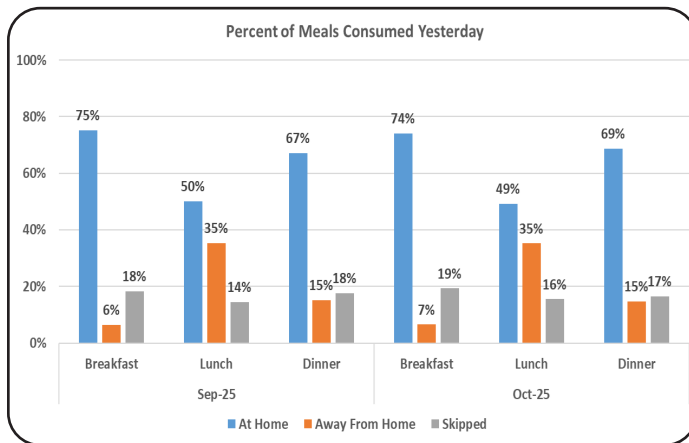
Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 42% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor (56% top-4, 30% middle-4, and 14% bottom-4 factor). To see how Taste outranks Price (on average), note there are 30% more who consider Price a top-4 factor (50%) than a bottom-4 factor (20%). Yes Price matters but Taste impacts protein purchasing decision for more residents.



Prior Day Meals: Location & Protein Consumption Frequency

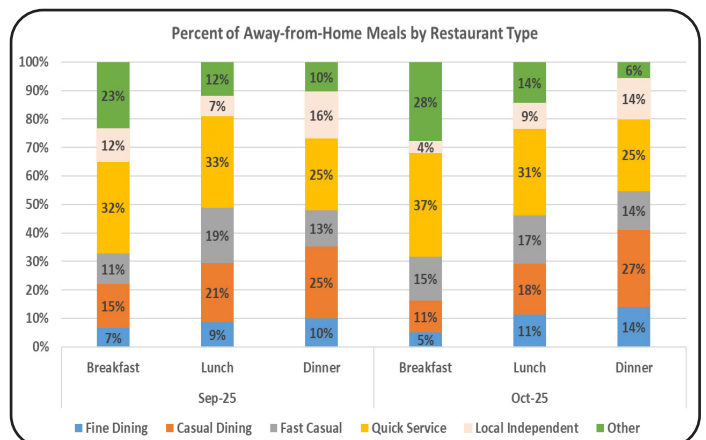
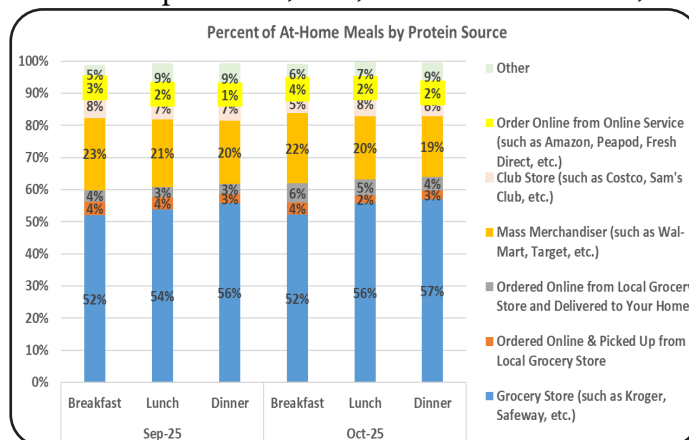
Respondents indicate 74%, 49%, and 69% consumed breakfast, lunch, and dinner at home in October with dinner meals at home increasing in prevalence from September. In October, 14%, 22%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 18% of these meals.



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

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

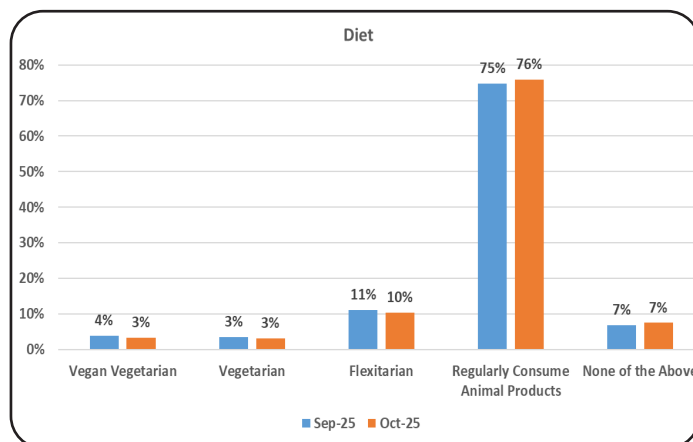
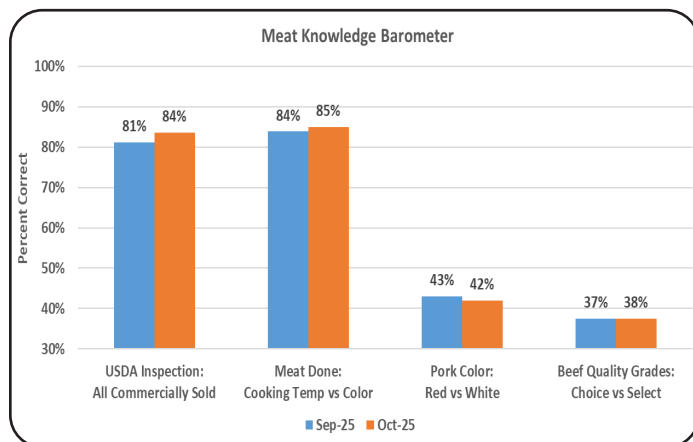
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch while Casual Dining (Applebee's, Olive Garden, Outback, etc.) leads for dinner. Combined, Casual Dining, Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 63%, 65%, and 66% of breakfast, lunch, and dinner meals in October.



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.

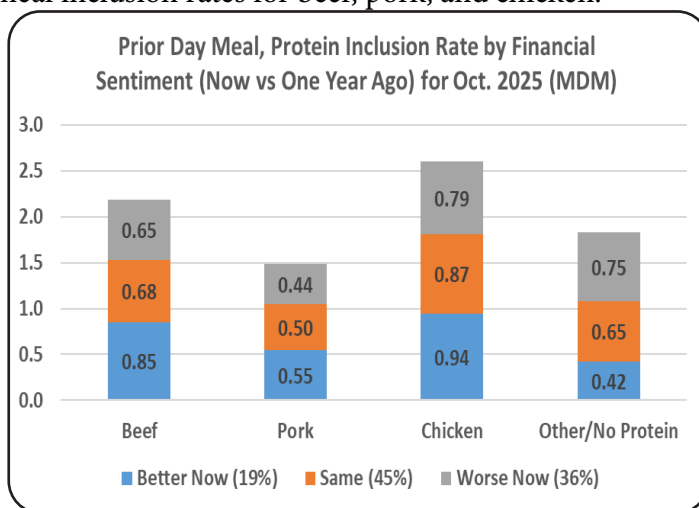
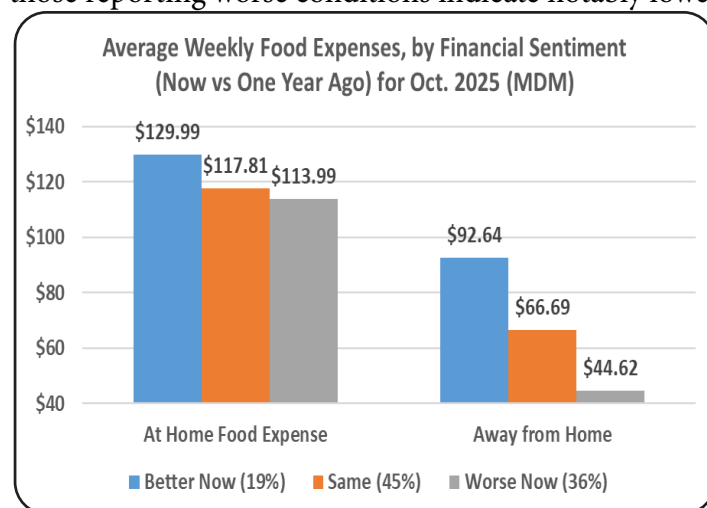
In October, 76% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 6% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

In October 19% indicate their household finances are better than one year earlier while 45% indicate same and 36% indicate worse conditions. Those reporting improved finances spend 21% and 40% more on food (across both at- and away-from-home) than those reporting same or worse conditions, respectively with the biggest differences being in away-from-home spending (which particularly declined in October for those reporting worsening financial conditions).

Looking at prior day meal inclusion of major proteins reinforces the importance of household finances as those reporting worse conditions indicate notably lower meal inclusion rates for beef, pork, and chicken.



For more information about this publication and others, visit AgManager.info.

K-State Agricultural Economics • 342 Waters Hall, Manhattan, KS 66506-4011 • 785-532-1504

Copyright 2025 AgManager.info, K-State Department of Agricultural Economics

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>

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.



**Funded in part by
the Beef Checkoff.**

