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
Sep-26 WTP ($/lb)	$20.71	$12.11	$9.79	$7.56	$11.47	$8.35	$10.11	$4.58	
Market Share	11%	26%	14%	7%	26%	2%	4%	6%	4%
Oct-26 WTP ($/lb)	$19.72	$11.06	$8.70	$7.49	$10.53	$8.52	$10.68	$4.37	
Market Share	10%	26%	12%	8%	26%	2%	4%	7%	5%

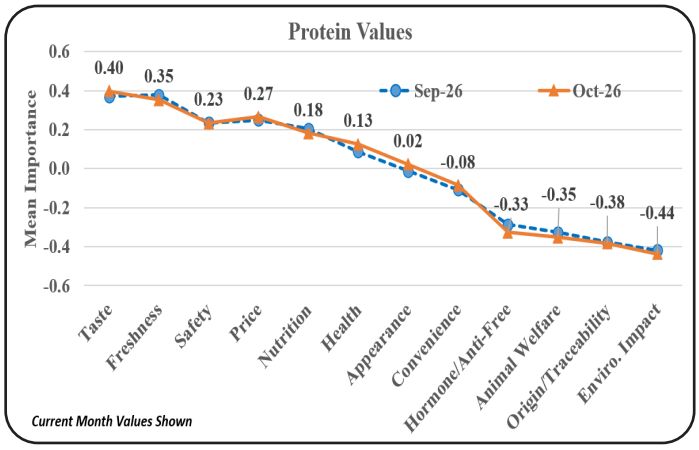
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Sep-26 WTP ($/meal)	$29.75	$23.89	$17.70	$20.61	$20.91	$13.71	$19.79	$20.76	
Market Share	16%	28%	5%	10%	15%	3%	12%	8%	4%
Oct-26 WTP ($/meal)	$31.45	$25.93	$18.37	$21.36	$22.06	$15.21	$20.17	$21.20	
Market Share	16%	29%	5%	9%	15%	4%	10%	7%	4%

Willingness-to-pay (WTP) decreased on six of eight evaluated Retail products and increased on all evaluated Food Service dinner meals in October compared to September.

The combined beef and pork projected market shares (projections made at intermediate level of eight presented prices) for October are 36% and 21%, respectively at the grocery store and 45% and 14% at the restaurant.

Protein Values

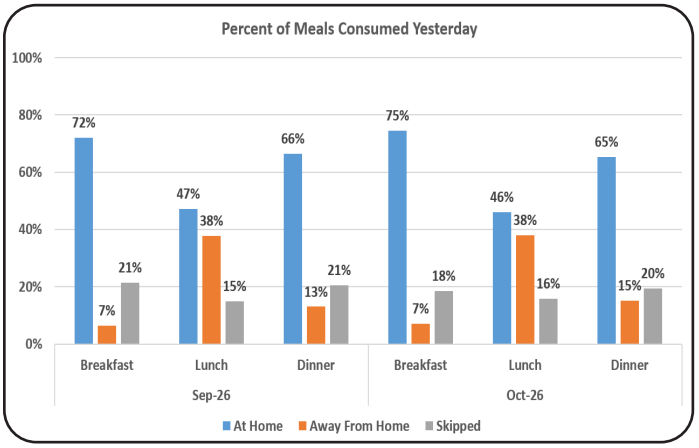
Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 27% more considering Price a top-4 factor (of 12 examined) than considering Price a bottom-4 purchasing factor (48% top-4, 31% middle-4, and 21% bottom-4 factor).

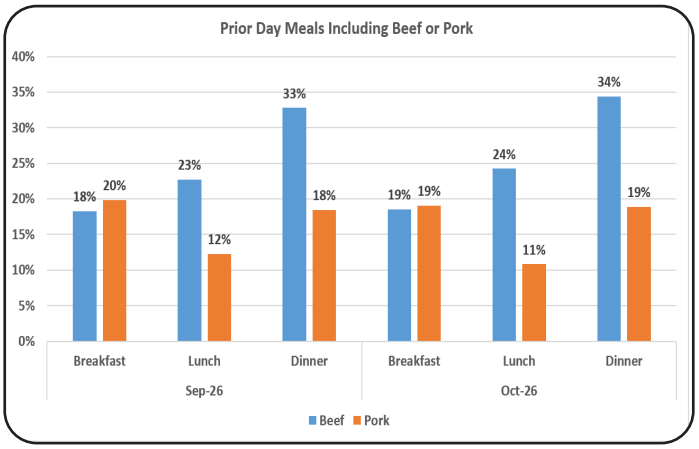


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Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 75%, 46%, and 65% consumed breakfast, lunch, and dinner at home in October with lunch and dinner being consumed less often at-home than in September. Meal skipping decreased for both breakfast and dinner when compared to September. In October, 19%, 24%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 11%, and 19% of these meals.

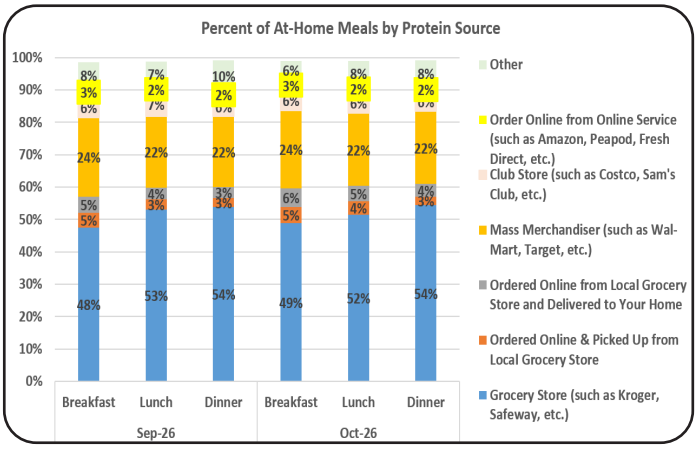


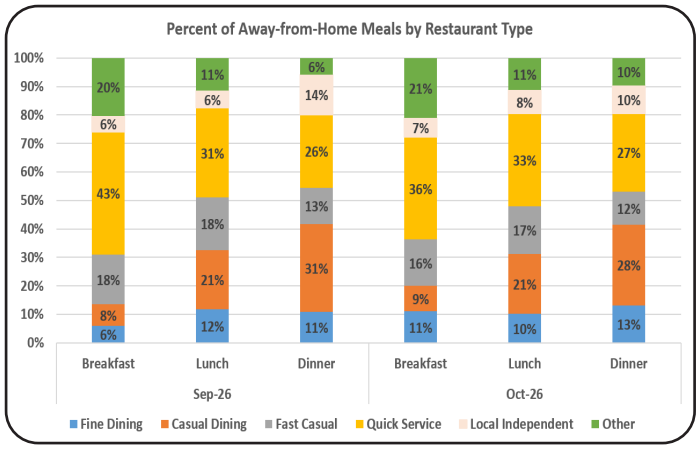


Prior Day Meals: At-Home Protein Source & Restaurant Type

In October, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 30%, 29%, and 28% 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 leads for dinner meals. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 61%, 70%, and 67% of breakfast, lunch, and dinner meals in October.





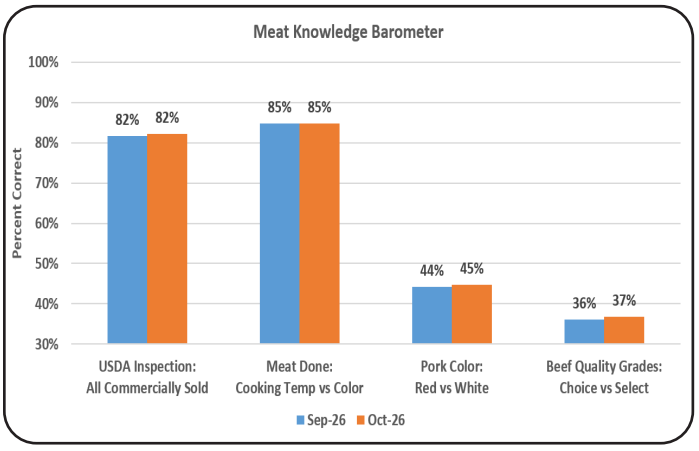
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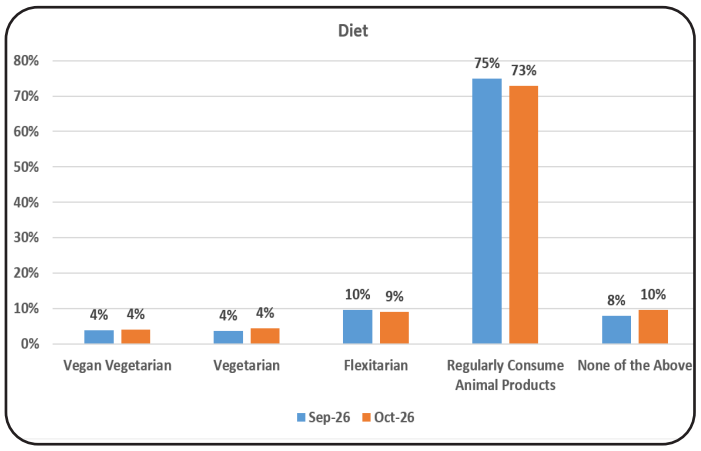
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Additional MDM Project details are available at: https://www.agmanager.info/

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 October, 73% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.

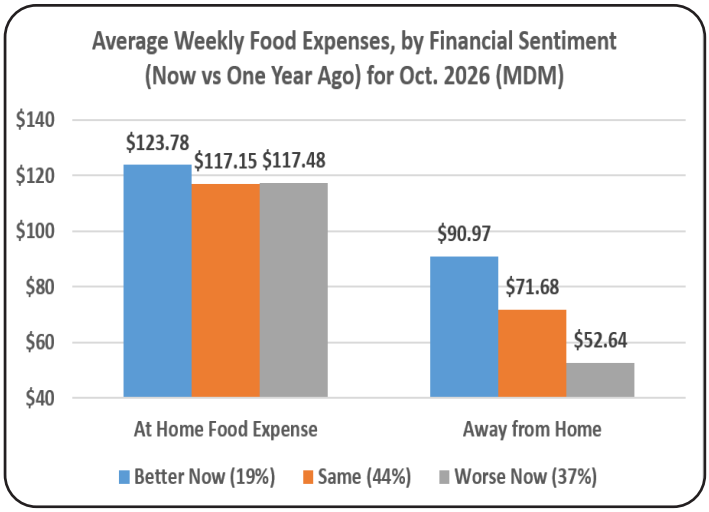


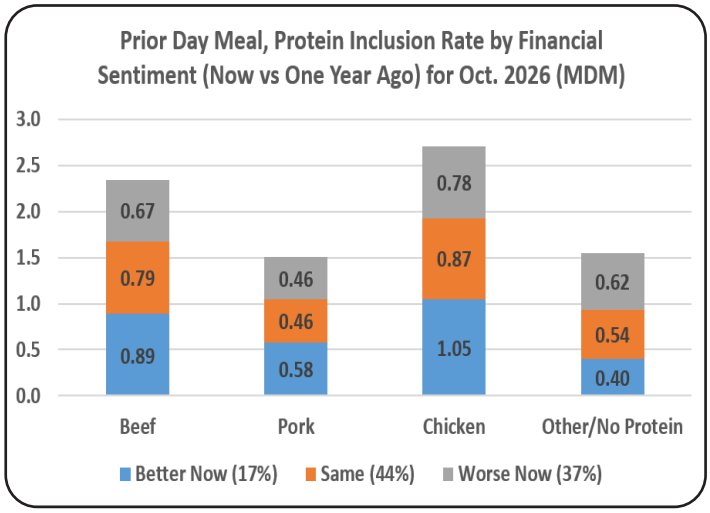


Ad Hoc Questioning

In October financial sentiment was rather unchanged from September and August as 19% indicate their household finances are better than one year earlier, while 44% indicate same and 37% indicate worse conditions. As shown for months now, this aligns with broader "K-shaped economy" and "affordability" discussions as food expenditures, particularly away-from-home, follow directly from household financial changes.

Further, this regularly corresponds with notable differences in prior day meat consumption frequency. Recall, both meat consumption and demand (not the same measures nor concepts!) grow with income & wealth.





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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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