

Willingness to Pay & Projected Market Share

<i>RETAIL</i>	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Aug-25 WTP (\$/lb)	\$17.98	\$9.14	\$7.23	\$6.17	\$8.97	\$8.40	\$9.97	\$3.80	
Market Share	8%	24%	12%	8%	27%	2%	5%	8%	6%
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%

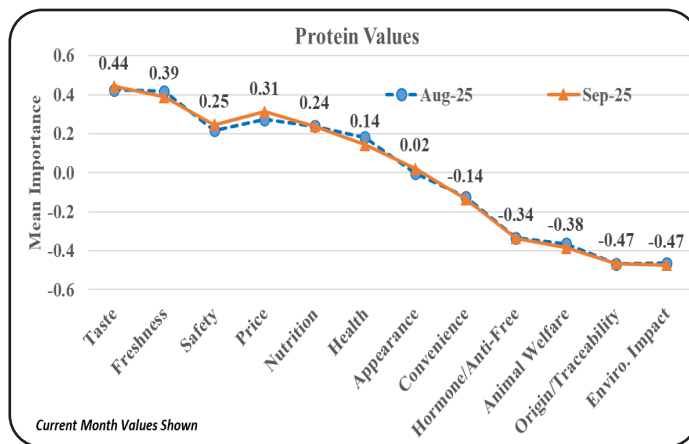
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-25 WTP (\$/meal)	\$27.86	\$22.47	\$17.00	\$19.42	\$19.40	\$13.00	\$18.57	\$19.40	
Market Share	14%	28%	5%	10%	14%	4%	12%	8%	5%
Sep-25 WTP (\$/meal)	\$27.18	\$21.27	\$16.73	\$18.71	\$18.94	\$13.30	\$17.98	\$19.97	
Market Share	14%	28%	5%	9%	15%	4%	12%	9%	5%

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

The combined beef and pork projected market shares for September are 33% and 22%, respectively at the grocery store and 42% and 14% at the restaurant.

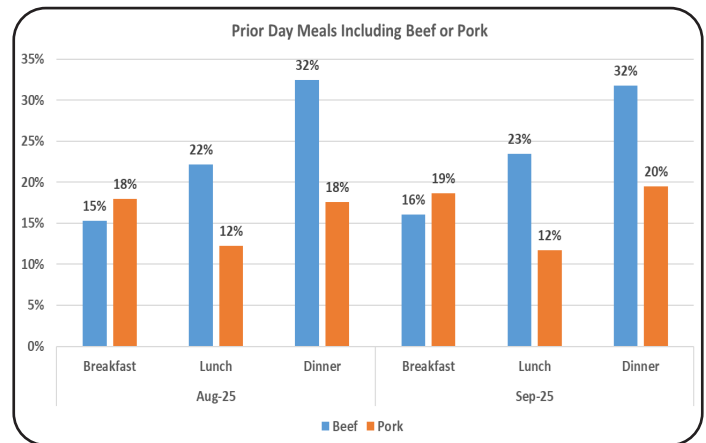
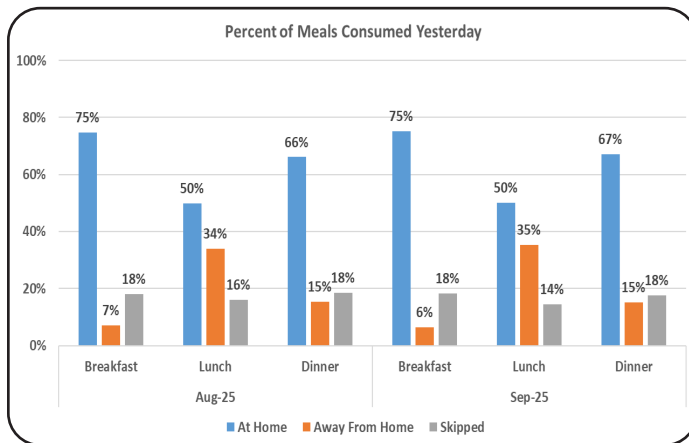
Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 44% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor.



Prior Day Meals: Location & Protein Consumption Frequency

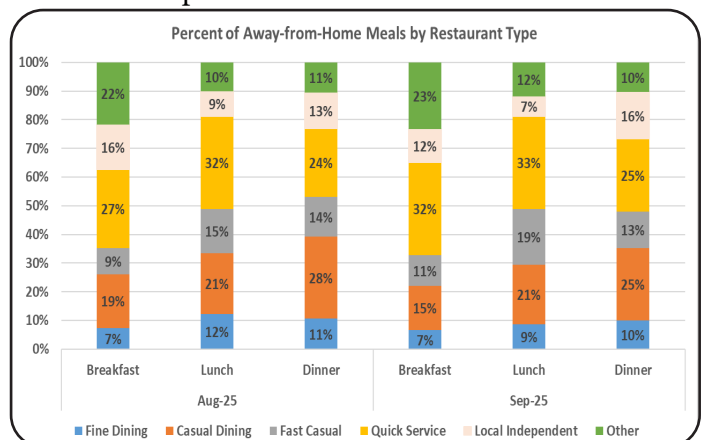
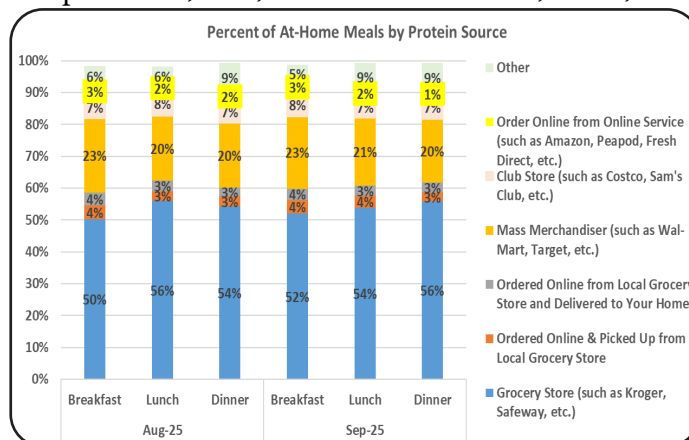
Respondents indicate 75%, 50%, and 67% consumed breakfast, lunch, and dinner at home in September. In September, 16%, 23%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 20% of these meals.



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

In September, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 30%, 28%, and 27% of breakfast, lunch, and dinner meals.

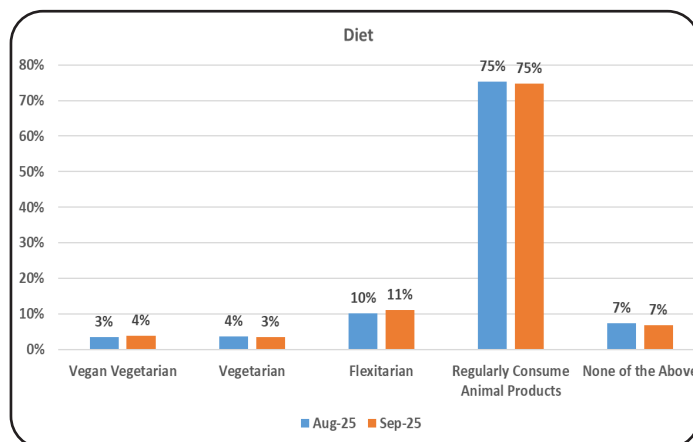
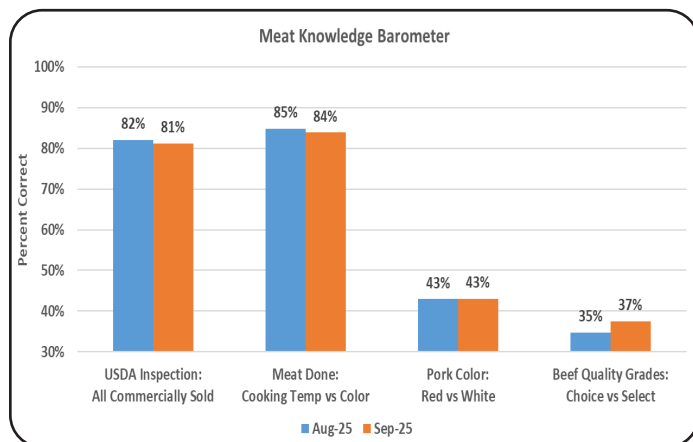
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for all three while Casual Dining (Applebee's, Olive Garden, Outback, etc.) is close for dinner. Combined, Casual Dining, Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 59%, 73%, and 63% of breakfast, lunch, and dinner meals in September.



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.

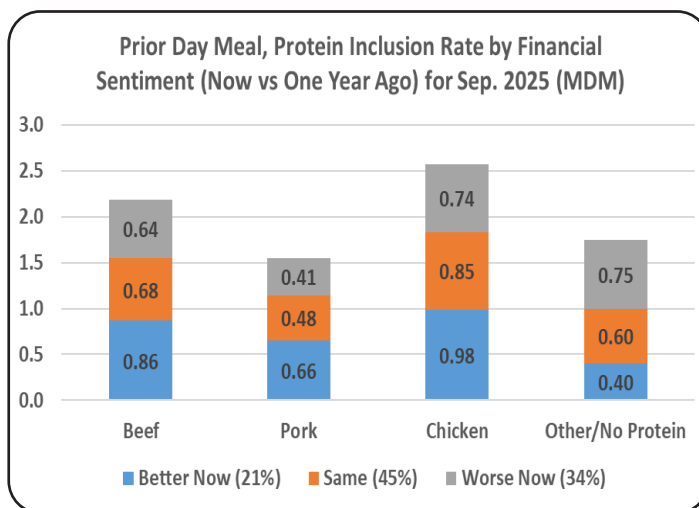
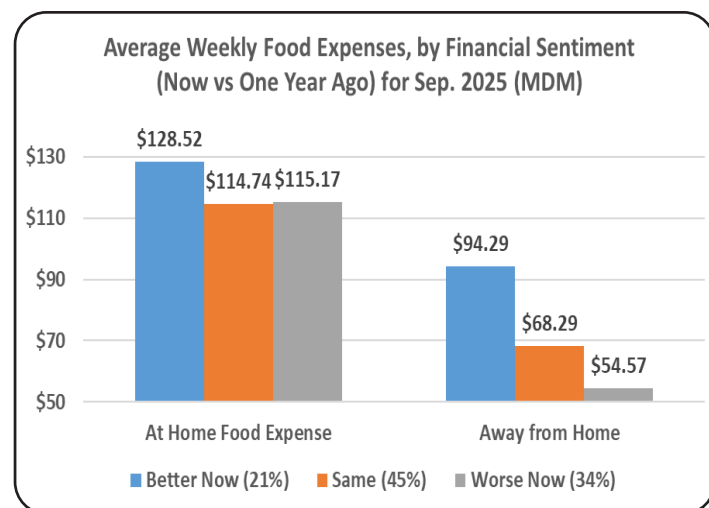
In September, 75% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 7% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

In September 21% indicate their household finances are better than one year earlier while 45% indicate same and 34% indicate worse conditions. Those reporting improved finances spend 22% and 31% 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.

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.



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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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**Funded in part by
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