

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-26 WTP (\$/lb)	\$19.54	\$10.54	\$8.48	\$6.96	\$10.03	\$8.60	\$10.21	\$4.21	
Market Share	10%	26%	13%	7%	26%	2%	4%	7%	5%
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%

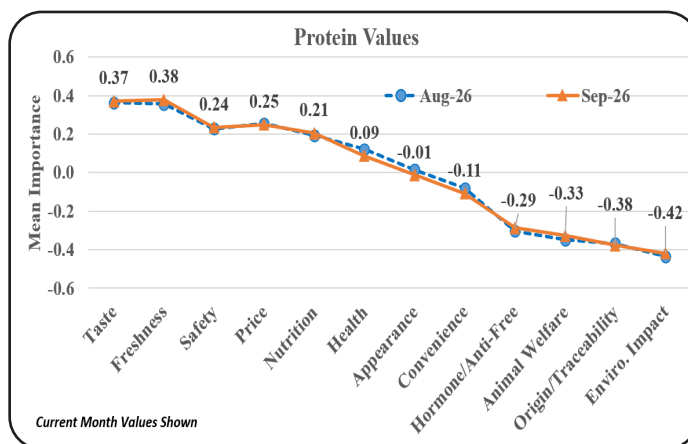
<i>FOOD SERVICE</i>	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-26 WTP (\$/meal)	\$29.69	\$23.63	\$17.15	\$20.26	\$19.39	\$12.39	\$18.96	\$20.01	
Market Share	17%	29%	5%	10%	13%	3%	11%	8%	5%
Sep-26 WTP (\$/meal)	\$29.75	\$23.89	\$17.70	\$20.61	\$20.91	\$13.71	\$19.79	\$20.76	
Market Share	16%	28%	5%	10%	15%	3%	12%	8%	4%

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

The combined beef and pork projected market shares (projections made at intermediate level of eight presented prices) for September are 37% and 21%, respectively at the grocery store and 44% and 14% at the restaurant.

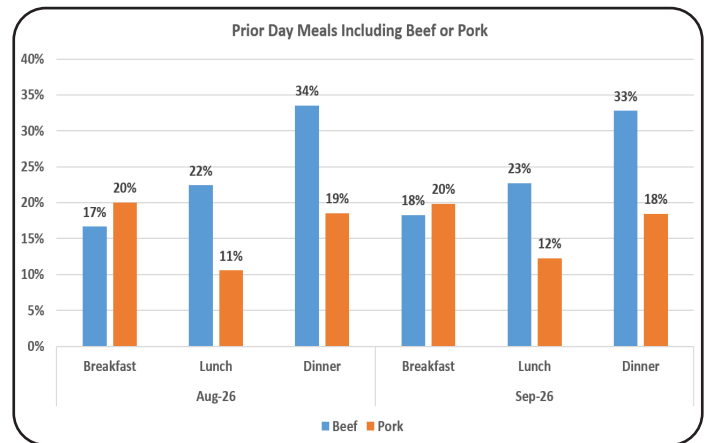
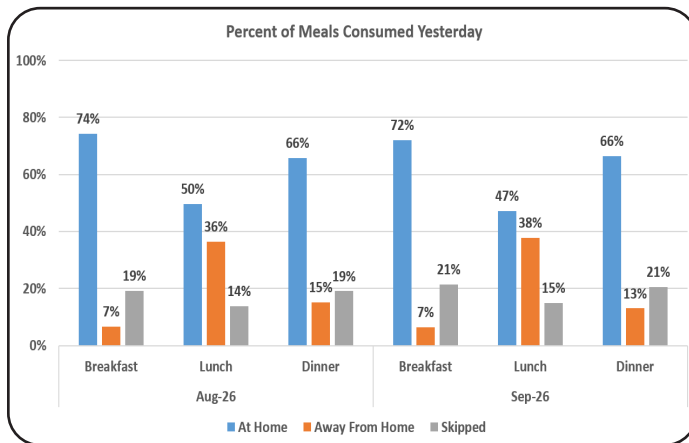
Protein Values

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, nationally there are 25% more considering Price a top-4 factor (of 12 examined) than considering Price a bottom-4 purchasing factor (47% top-4, 31% middle-4, and 22% bottom-4 factor).



Prior Day Meals: Location & Protein Consumption Frequency

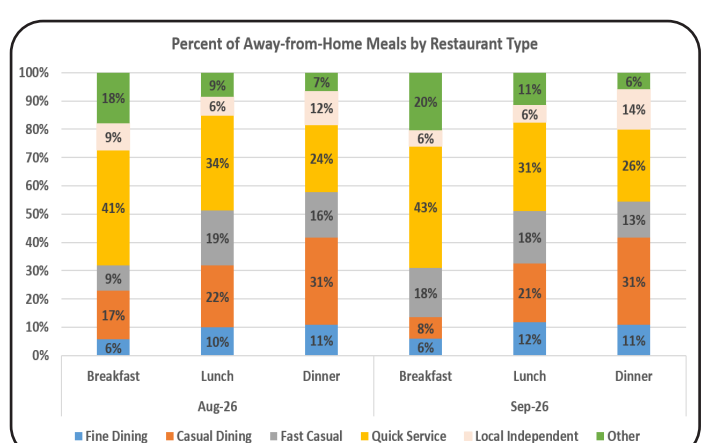
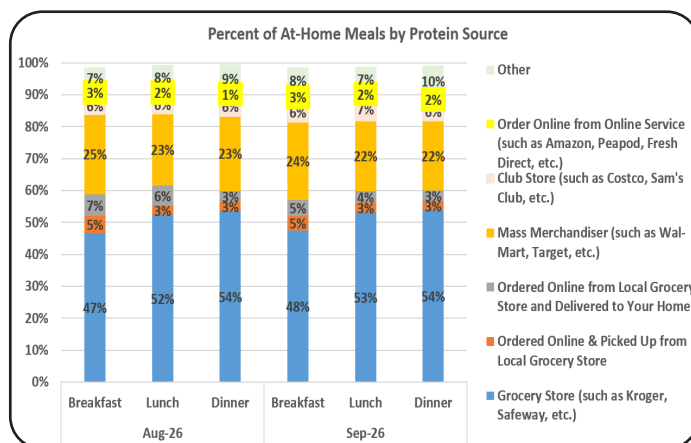
Respondents indicate 72%, 47%, and 66% consumed breakfast, lunch, and dinner at home in September with breakfast and lunch being consumed less often at-home than in August. Of note is meal skipping increasing for all three meals when compared to August. In September, 18%, 23%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 20%, 12%, and 18% 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 31%, 29%, and 28% of breakfast, lunch, and dinner meals.

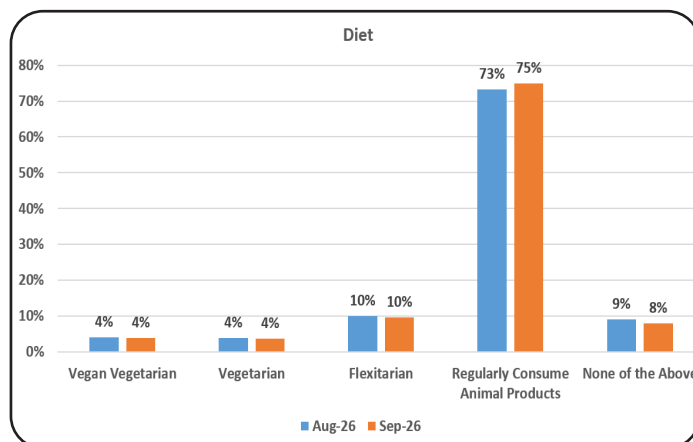
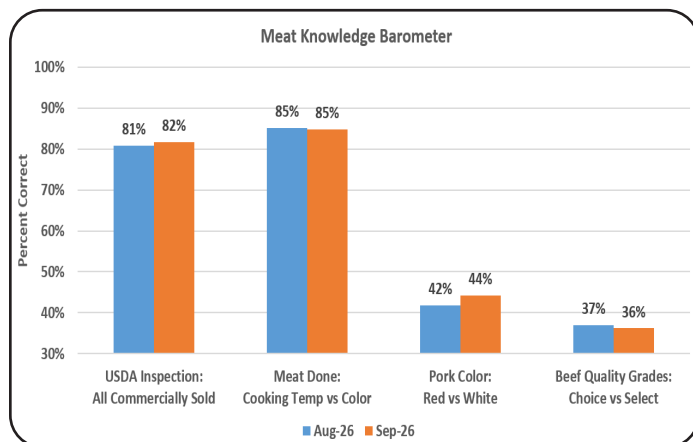
Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch while Casual Dining leads for dinner meals. Combined, Casual Dining (Applebee's, Olive Garden, Outback, etc.), Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 68%, 71%, and 69% 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.

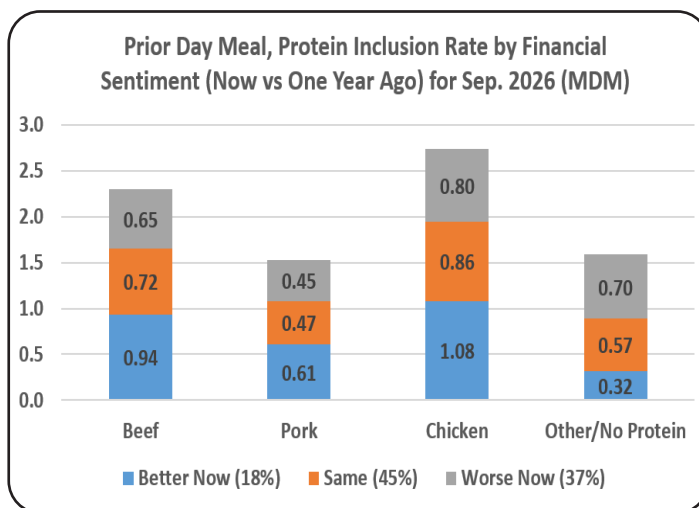
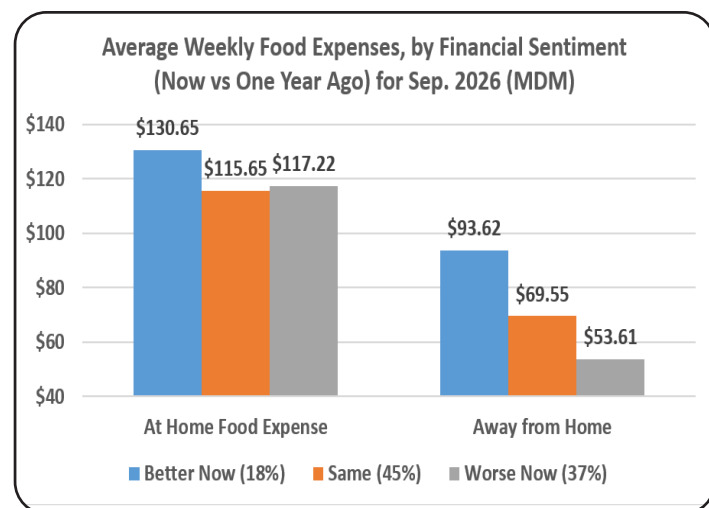
In September, 75% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

In September financial sentiment was rather unchanged from August as 18% indicate their household finances are better than one year earlier, while 45% indicate same and 37% indicate worse conditions. As shown repeatedly 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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the Beef Checkoff.**

