KANSAS STATE
Department of Agricultural Economics
Vol. 1, Issue 3 ● Apr. 2020

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.

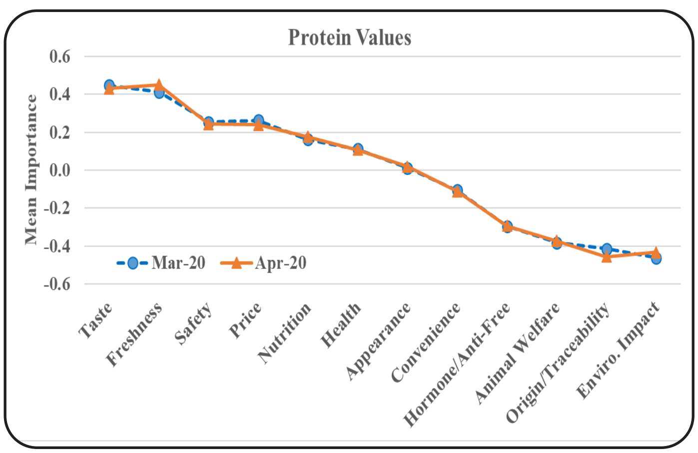
Willingness to Pay & Projected Market Share

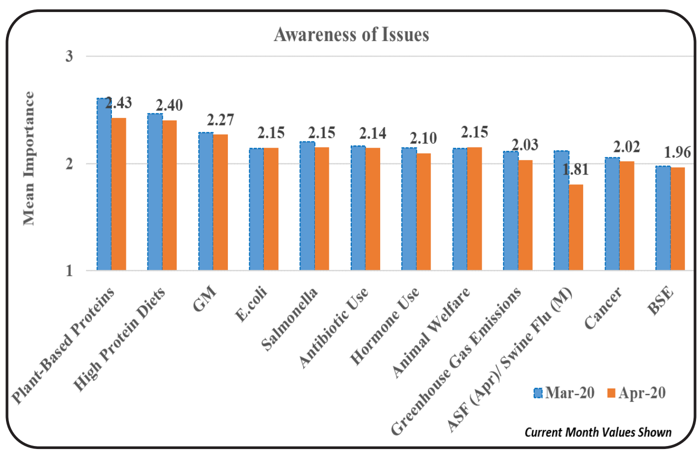
RETAIL		Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Mar-20	*WTP ($/lb)*	$ 15.89	$ 6.90	$ 5.74	$ 4.49	$ 7.13	$ 7.98	$ 8.55	$ 2.12	
	Market Share	**6.9%**	**21.5%**	**12.6%**	**7.2%**	**27.2%**	**2.7%**	**4.5%**	**7.5%**	**9.9%**
Apr-20	*WTP ($/lb)*	$ 16.44	$ 7.72	$ 6.33	$ 5.06	$ 7.58	$ 8.23	$ 8.98	$ 2.56	
	Market Share	**7.1%**	**23.4%**	**12.9%**	**7.4%**	**26.3%**	**2.6%**	**4.5%**	**7.4%**	**8.5%**
FOOD SERVICE		**Ribeye Steak**	**Beef Hamburger**	**Pork Chop**	**Baby Back Ribs**	**Chicken Breast**	**Plant-Based Patty**	**Shrimp**	**Salmon**	**Something Else**
Mar-20	*WTP ($/lb)*	$ 24.90	$ 18.39	$14.58	$ 17.53	$ 16.79	$ 12.83	$ 17.38	$17.27	
	Market Share	**13.4%**	**23.9%**	**4.4%**	**10.3%**	**14.5%**	**4.6%**	**14.7%**	**7.3%**	**6.9%**
Apr-20	*WTP ($/lb)*	$ 24.65	$ 17.58	$13.47	$ 17.01	$ 16.17	$ 11.57	$ 16.51	$17.12	
	Market Share	**14.3%**	**22.3%**	**4.2%**	**10.6%**	**14.3%**	**4.3%**	**13.9%**	**8.2%**	**8.0%**

Willingness-to-pay (WTP) for all items in Retail increased in April compared to March while all items in Food Service declined, consistent with the ongoing COVID19 situation. The combined beef and pork projected market shares for April are 31% and 20%, respectively at the grocery store and 37% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Freshness and Nutrition increased in importance while Price and Origin/Traceability decreased from last month. Plant-based Proteins, High Protein Diets, and Genetically Modified Foods remained the three topics heard or read about the most. Overall awareness of issues and topics declined, likely reflecting focus on the COVID19 situation.





Prior Day Meal Location & Protein Consumption Frequency

Respondents indicate 78%, 66%, and 77% consumed breakfast, lunch, and dinner at home (vs. away from home) in April with all meals increasing from March in at home prevalence. In April, 13%, 23%, and 32% had beef in their prior day breakfast, lunch, and dinner. Pork was included in 21%, 15%, and 20% of these three meals.

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Meat Demand Monitor
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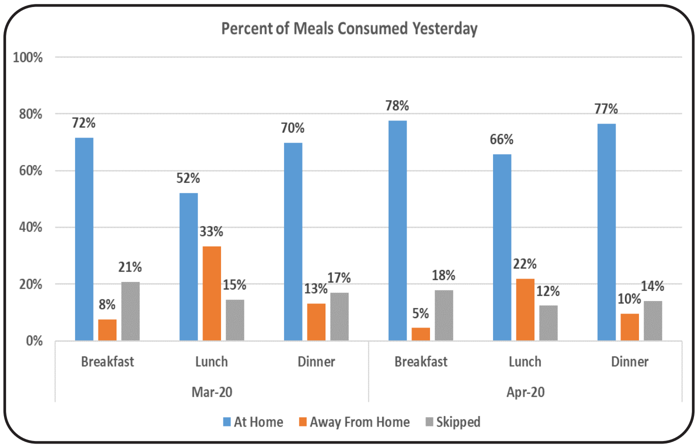
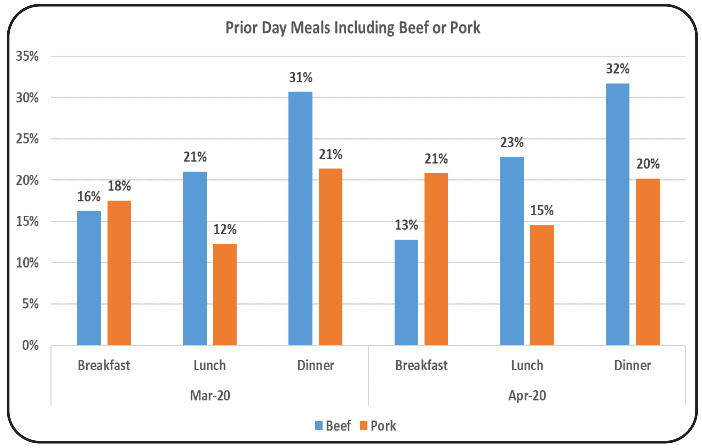
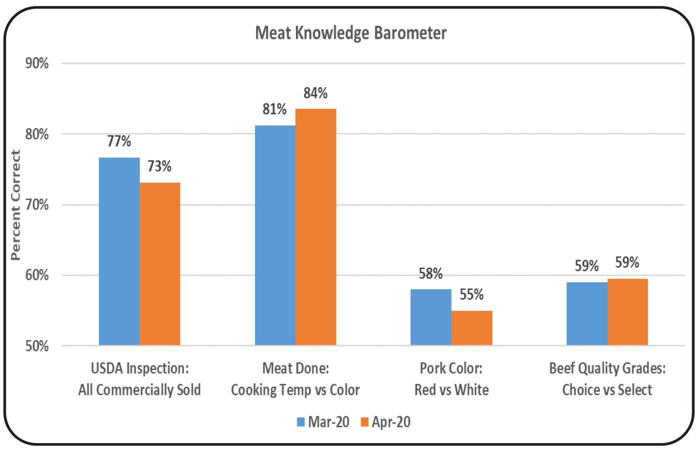
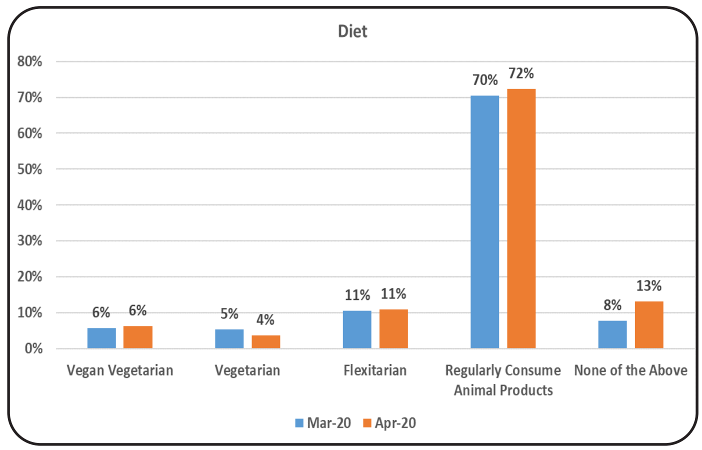




Meat Knowledge & Personal Diet

Consistent with last month, 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." Nearly one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

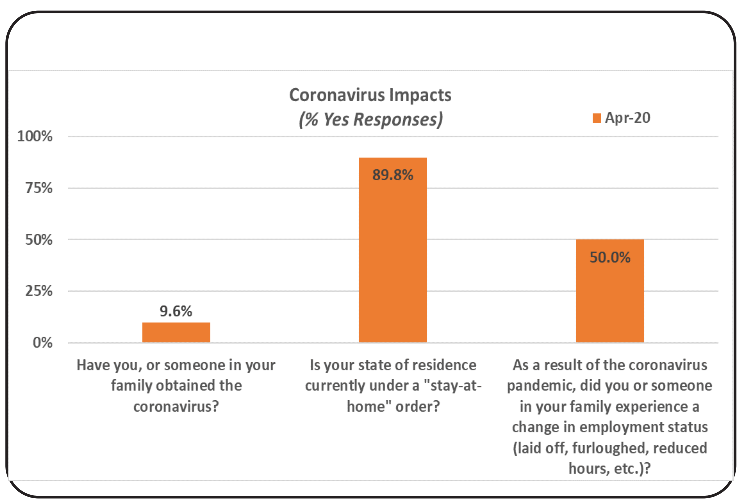




In April, 72% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 10% indicate they are either Vegan Vegetarian or Vegetarian.

Ad Hoc Questioning

The impact of COVID19 was examined in three new questions showing nearly 10% have a family member suspected to have obtained the coronavirus, nearly 90% reside in states under "stay-at-home" orders, and 50% of families have experienced a change in employment status. Future focused assessments will examine how this corresponds to meat demand.



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.

BEEF

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pork checkoff