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
Mar-21 WTP ($/lb)	$17.21	$8.05	$6.73	$5.57	$8.19	$8.44	$9.38	$2.55	
Market Share	8%	23%	13%	8%	28%	2%	4%	7%	7%
Apr-21 WTP ($/lb)	$17.27	$8.11	$6.33	$5.28	$7.31	$7.42	$8.56	$1.72	
Market Share	10%	24%	13%	8%	22%	3%	5%	6%	9%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-21 WTP ($/meal)	$25.00	$17.12	$13.12	$16.54	$15.88	$10.79	$16.30	$17.25	
Market Share	16%	22%	4%	10%	14%	4%	14%	8%	8%
Apr-21 WTP ($/meal)	$23.25	$18.12	$13.68	$17.27	$17.01	$12.24	$16.76	$16.37	
Market Share	11%	22%	5%	11%	16%	5%	14%	8%	8%

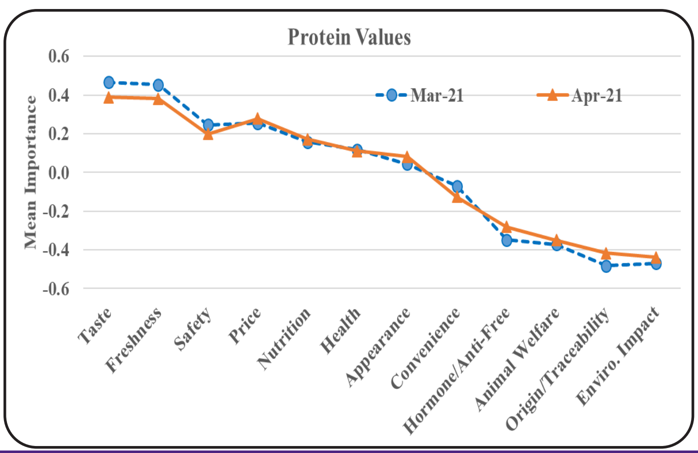
Willingness-to-pay (WTP) increased for two evaluated products in Retail, including both beef items, in April compared to March. WTP increased for six eight evaluated Food Service meals, including both pork meals.

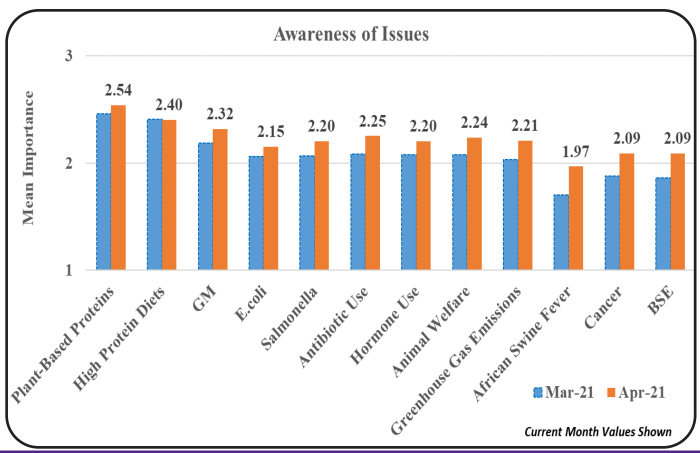
The combined beef and pork projected market shares for April are 34% and 21%, respectively at the grocery store and 33% and 16% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Hormone/Antibiotic-free increased most in importance while Taste decreased most from last month.

Plant-based Proteins, High Protein Diets, and Genetically modified foods are the topics heard or read most about.





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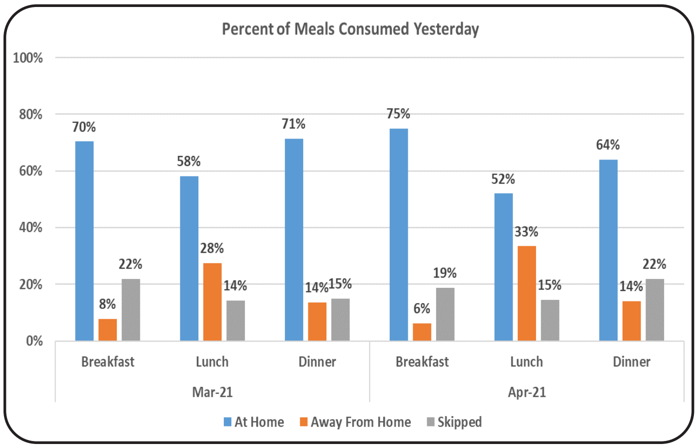
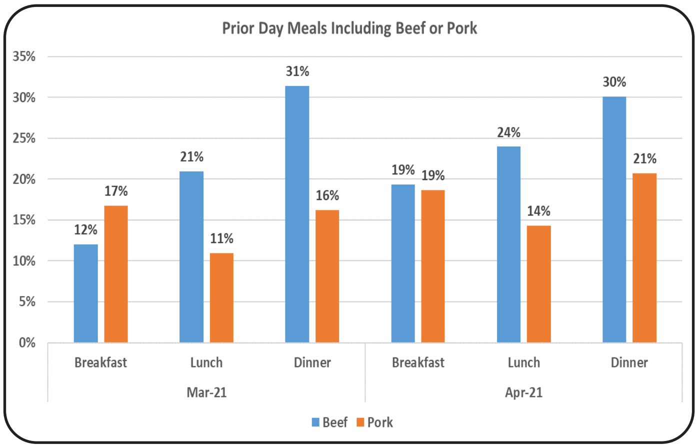
Prior Day Meals: Location & Protein Consumption Frequency

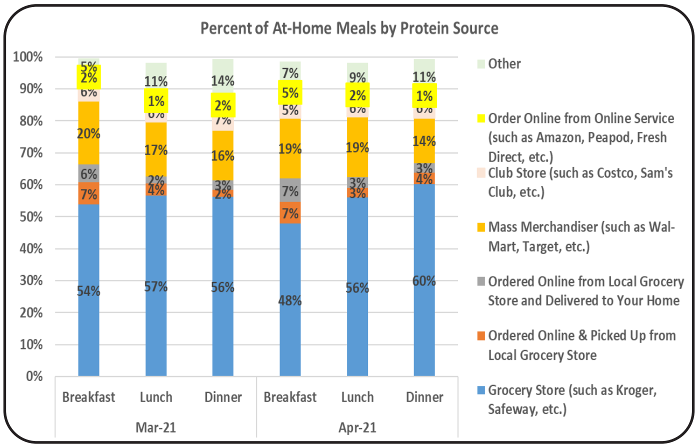
Respondents indicate 75%, 52%, and 64% consumed breakfast, lunch, and dinner at home in April with both lunch and dinner being well below March levels. In April, 19%, 24%, and 30% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 14%, and 21% of these meals.

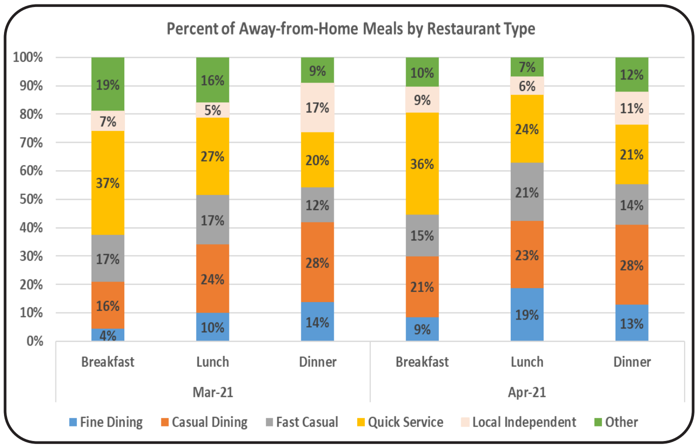




Prior Day Meals: At-Home Protein Source & Restaurant Type

In April, the protein source for at-home meals was predominantly Grocery Stores. Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for breakfast and lunch while Casual Dining leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 72%, 68%, and 64% of breakfast, lunch, and dinner meals in April.





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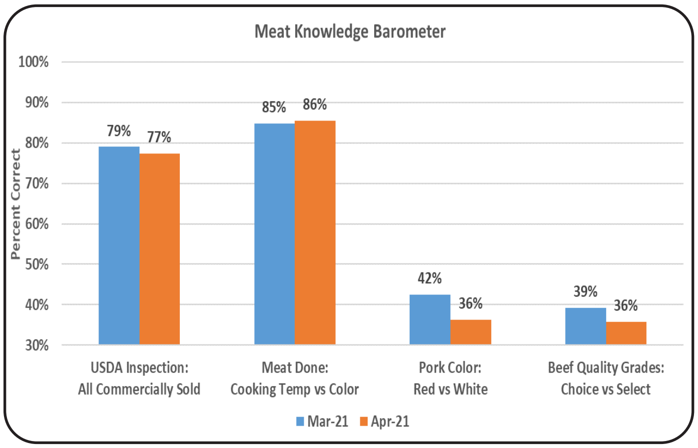
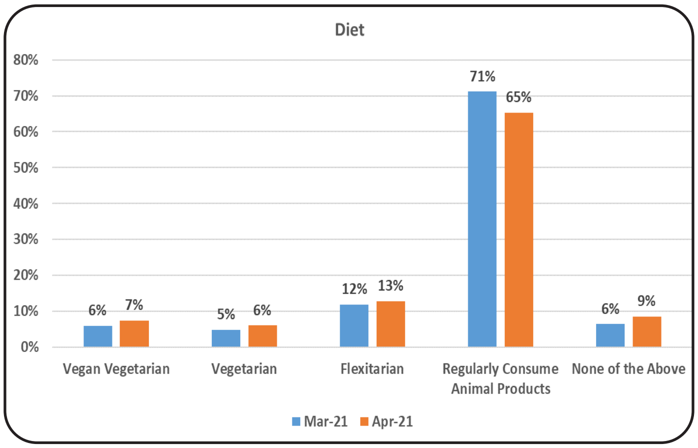
Meat Knowledge & Personal Diet

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." Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

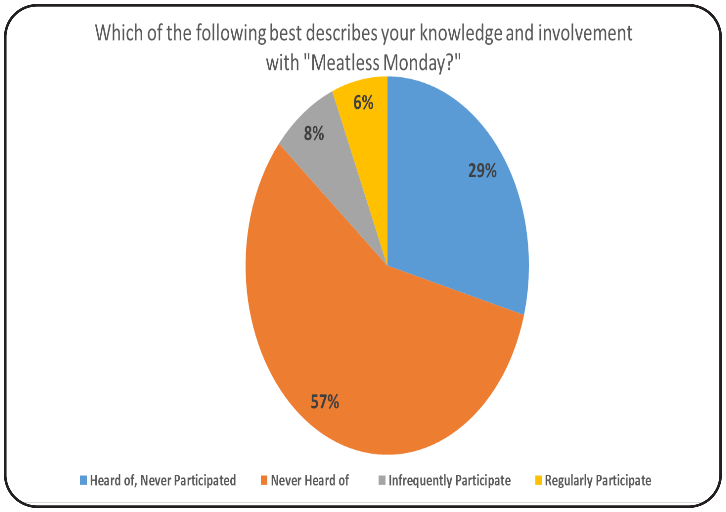
In April, 65% of respondents self-declare as regular consumers of products derived from animal products, 13% indicate they are Flexitarian/Semi-Vegetarian, and a combined 13% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

The April survey included a question to assess knowledge and involvement with "Meatless Monday." Over half of respondents (57%) indicate having never heard of "Meatless Monday." Only 6% indicate regularly participating, 8% indicate infrequently participating, and the remainder (29%) indicate they have heard of "Meatless Monday" but have never consciously participated. On balance this is similar to findings by Dr. Jayson Lusk in 2014 when similarly examined in the Food Demand Survey (FooDS) project.



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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BEEF

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pork checkoff

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