Kansas State
Department of
Agricultural Economics
Vol. 3, Issue 4 ● Apr. 2022

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-22 WTP ($/lb)	$18.91	$9.68	$8.29	$7.06	$9.62	$9.11	$10.01	$3.65	
Market Share	10%	23%	14%	9%	26%	3%	4%	7%	6%
Apr-22 WTP ($/lb)	$18.61	$9.34	$7.98	$6.71	$8.99	$9.11	$9.75	$3.63	
Market Share	9%	24%	14%	8%	25%	3%	4%	7%	6%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-22 WTP ($/meal)	$27.17	$19.76	$16.33	$18.19	$17.58	$12.72	$17.40	$18.97	
Market Share	17%	24%	5%	10%	14%	4%	12%	9%	6%
Apr-22 WTP ($/meal)	$28.91	$22.07	$17.72	$19.75	$19.76	$14.08	$20.10	$20.01	
Market Share	16%	24%	6%	10%	14%	4%	14%	8%	5%

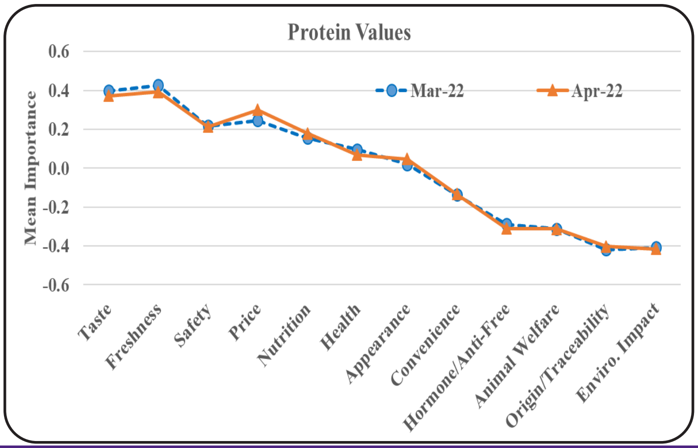
Willingness-to-pay (WTP) decreased for 7 evaluated Retail products in April compared to March. Meanwhile WTP increased for all 8 evaluated Food Service meals.

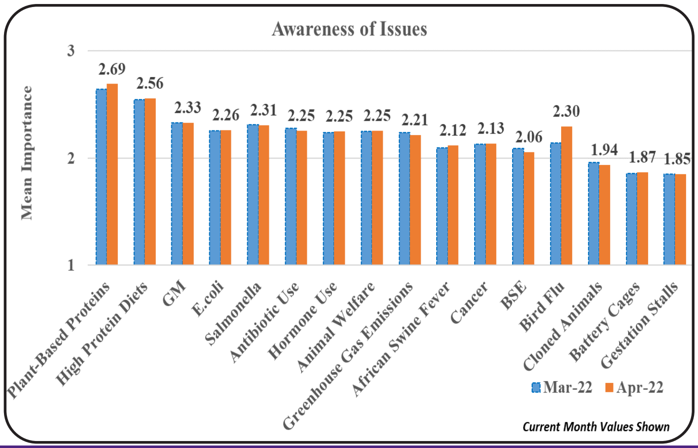
The combined beef and pork projected market shares for April are 33% and 22%, respectively at the grocery store and 40% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Price increased most in importance from last month while Freshness decreased the most.

Plant-based Proteins and High Protein Diets remain topics heard or read most about. Not surprisingly, awareness of Bird Flu topics increased notable in April.





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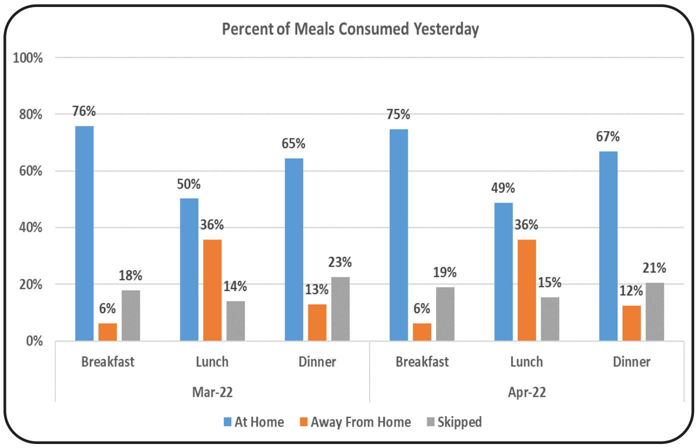
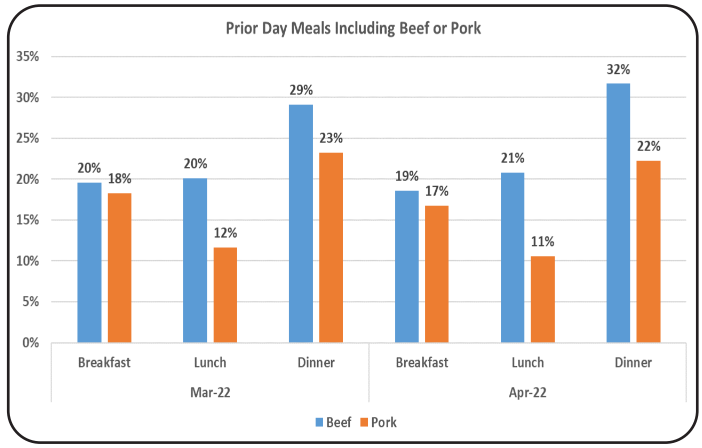
Prior Day Meals: Location & Protein Consumption Frequency

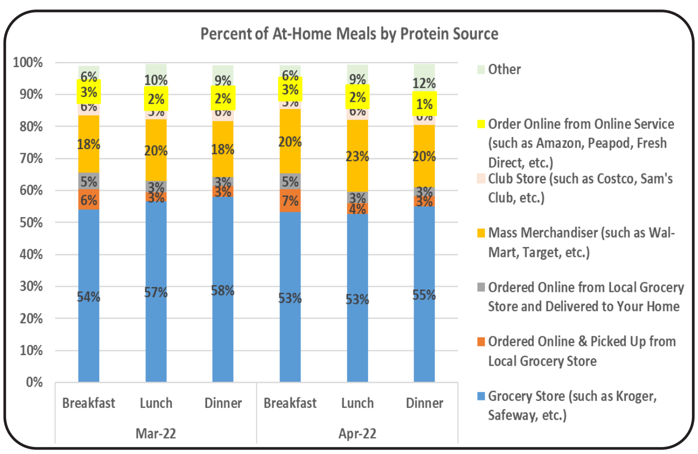
Respondents indicate 75%, 49%, and 67% consumed breakfast, lunch, and dinner at home in April. In April, 19%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 11%, and 22% of these meals.

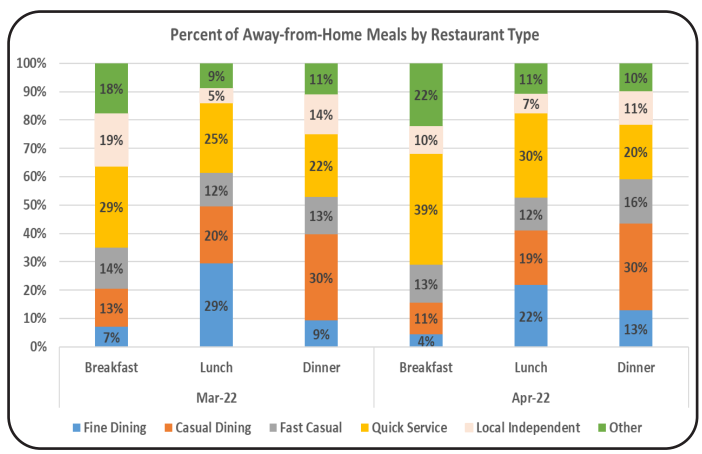




Prior Day Meals: At-Home Protein Source & Restaurant Type

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 64%, 61%, and 66% of breakfast, lunch, and dinner meals in April.





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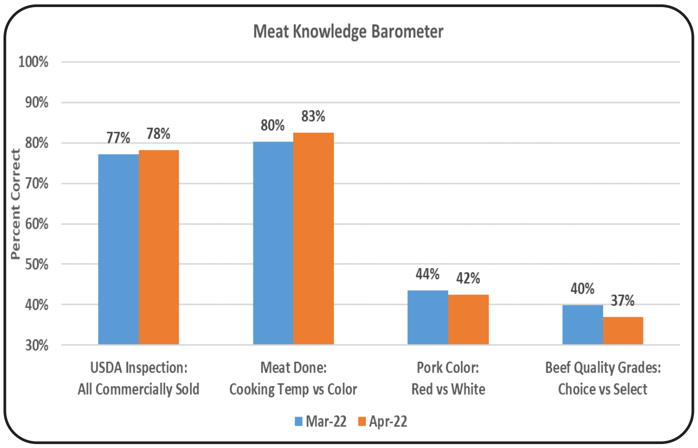
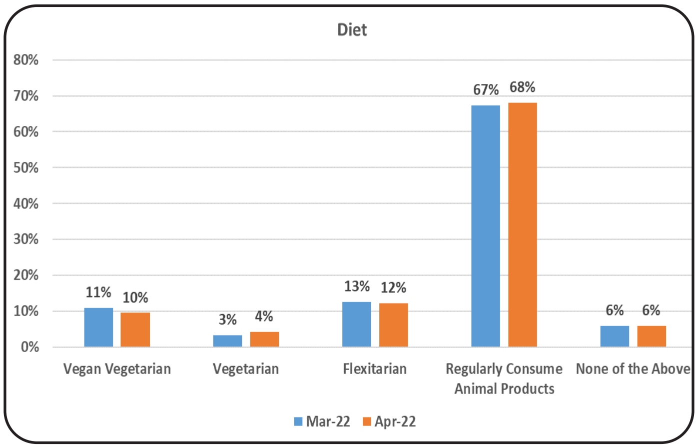
Additional MDM Project details are available at: https://www.agmanager.info/

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 April, 68% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 14% indicate they are either Vegan Vegetarian or Vegetarian.

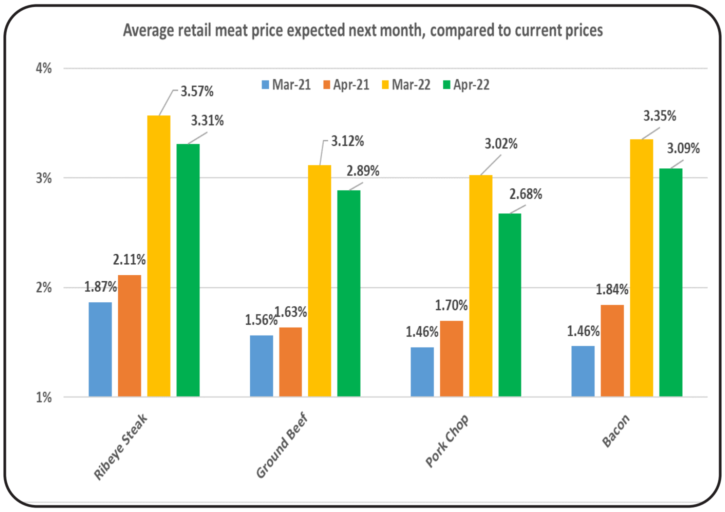


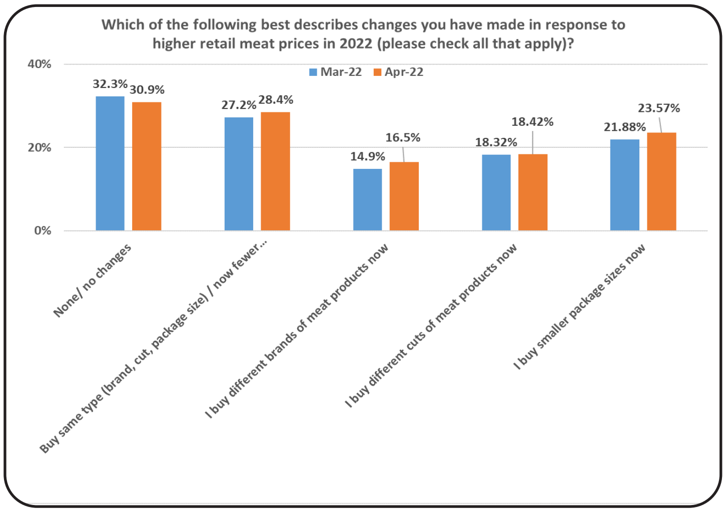


Ad Hoc Questioning

Consumers continue to expect higher retail meat prices next month and these price expectations are notably higher than one-year ago, perhaps reflecting ongoing inflation discussions.

A question from last month was repeated asking how consumers have responded to higher retail meat prices in 2022. The most common response (31%) remains no change being made. Among those indicating changes, the most prevalent noted adjustment remains reducing the volume of items purchased while being steadfast in product type (brand, cut, and package size).





For more information about this publication and others, visit AgManager.info.
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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

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.

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