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-23 WTP ($/lb)	$16.94	$8.18	$6.98	$5.40	$7.87	$8.82	$9.24	$2.96	
Market Share	7%	24%	14%	7%	26%	3%	4%	7%	7%
Apr-23 WTP ($/lb)	$17.26	$8.28	$6.54	$5.38	$8.00	$7.70	$9.15	$2.96	
Market Share	8%	24%	12%	7%	26%	2%	4%	8%	8%

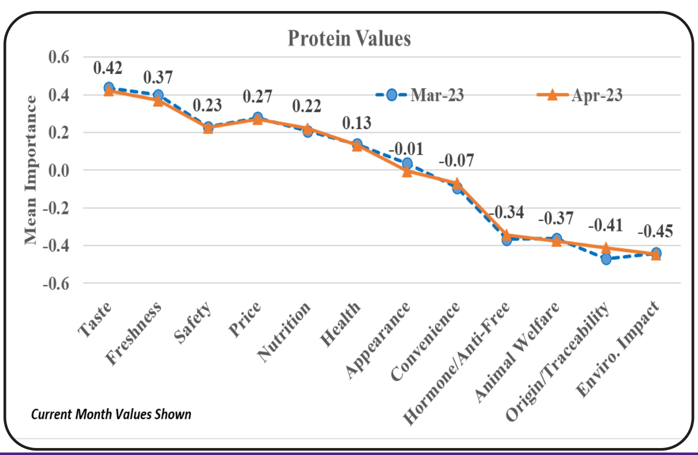
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-23 WTP ($/meal)	$27.16	$20.68	$16.47	$19.60	$19.18	$13.47	$18.12	$19.55	
Market Share	14%	24%	5%	11%	16%	4%	12%	8%	5%
Apr-23 WTP ($/meal)	$28.06	$21.12	$16.70	$19.13	$18.91	$13.19	$18.97	$19.37	
Market Share	16%	25%	5%	10%	14%	4%	13%	8%	5%

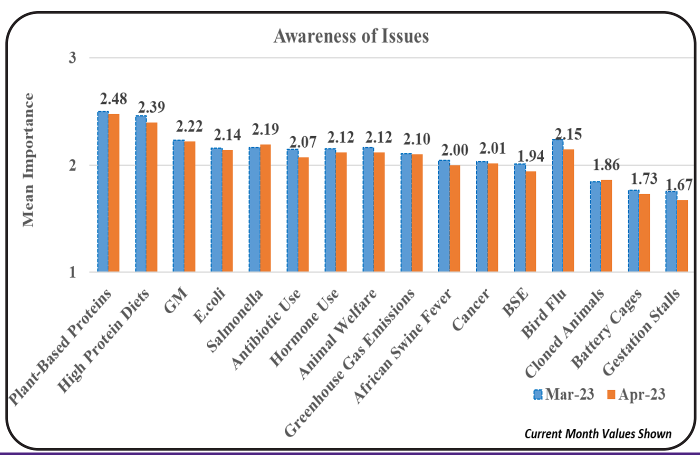
Willingness-to-pay (WTP) increased for three (both beef and chicken breast) evaluated Retail products, in April compared to March. WTP increased for four evaluated Food Service meals. Demand for all examined retail products and food service dinner meals was lower in April of 2023 than in April of 2022.

The combined beef and pork projected market shares for April are 33% and 20%, respectively at the grocery store and 41% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. The importance of Origin/ Traceability increased most since March with Nutrition declining most in importance. Plant-based Proteins and High Protein Diets remain topics heard or read most about.





Meat Demand Monitor
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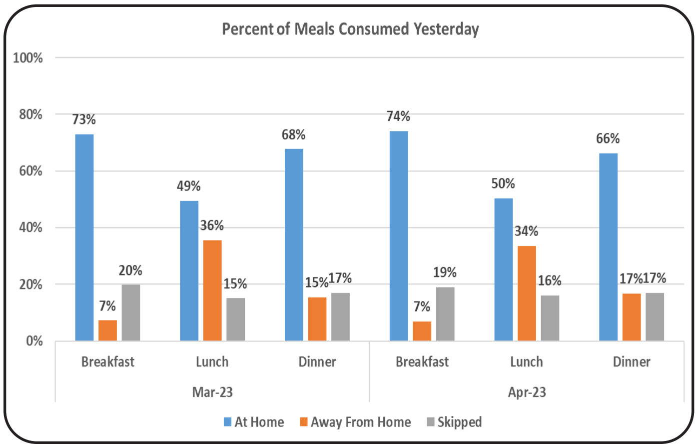
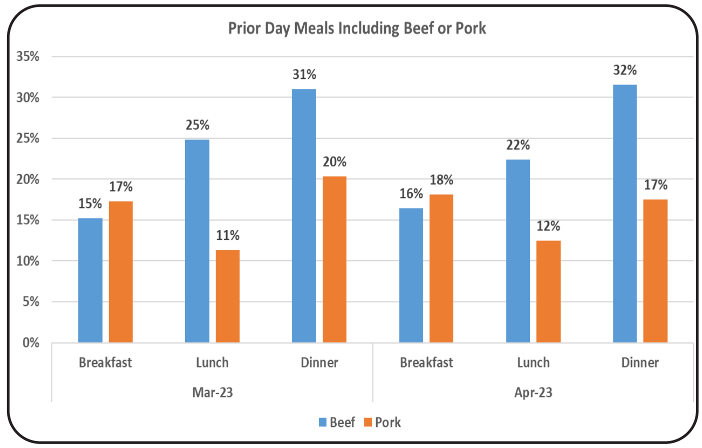
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 50%, and 66% consumed breakfast, lunch, and dinner at home in April with both breakast and lunch rates being higher than in March. In April, 16%, 22%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 17% of these meals.

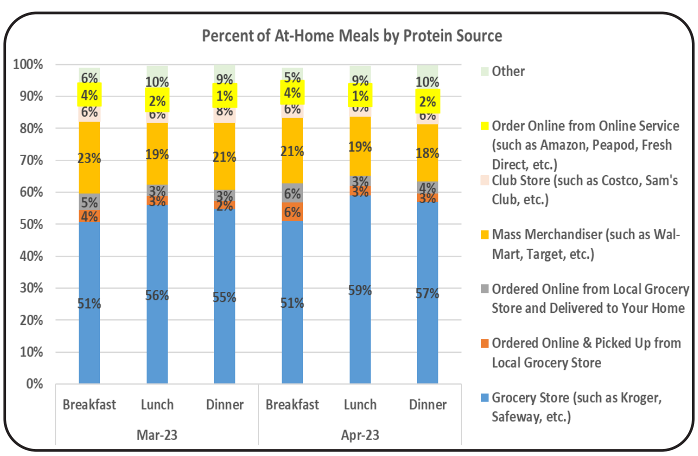


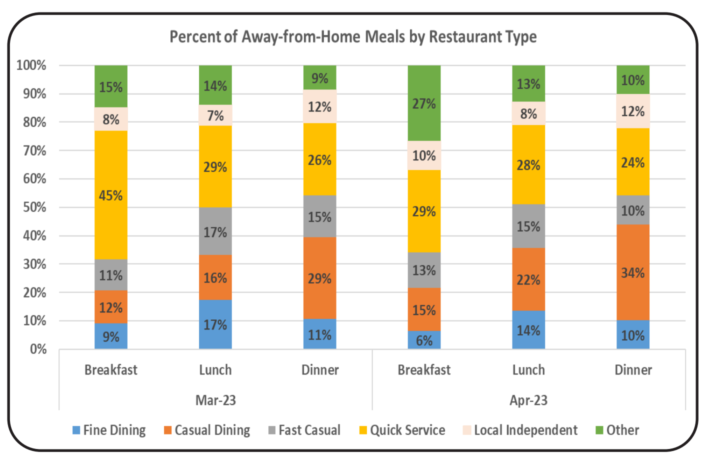


Prior Day Meals: At-Home Protein Source & Restaurant Type

In April, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 25%, and 24% of breakfast, lunch, and dinner meals.

Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for breakfast and lunch meals while Casual Dining led for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 57%, 66%, and 68% of breakfast, lunch, and dinner meals in April.

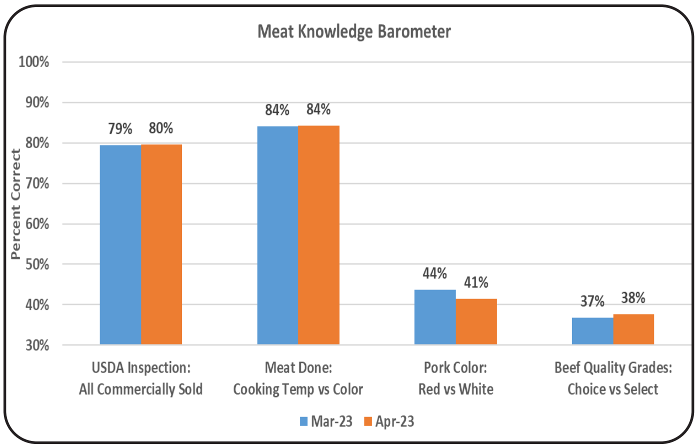


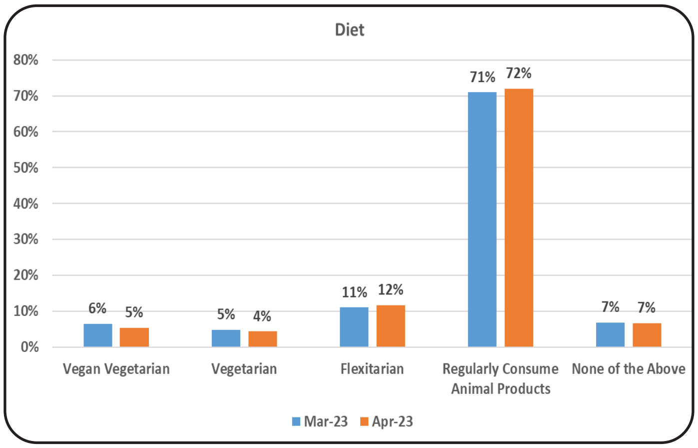


Meat Knowledge & Personal Diet

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, 72% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 10% indicate they are either Vegan Vegetarian or Vegetarian.

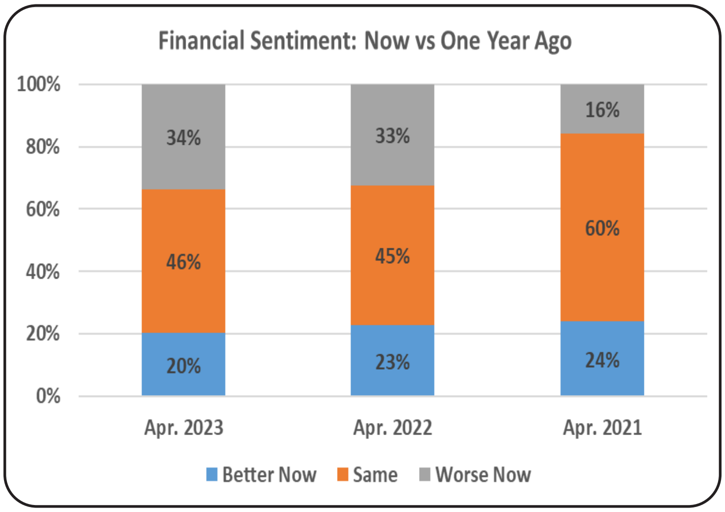


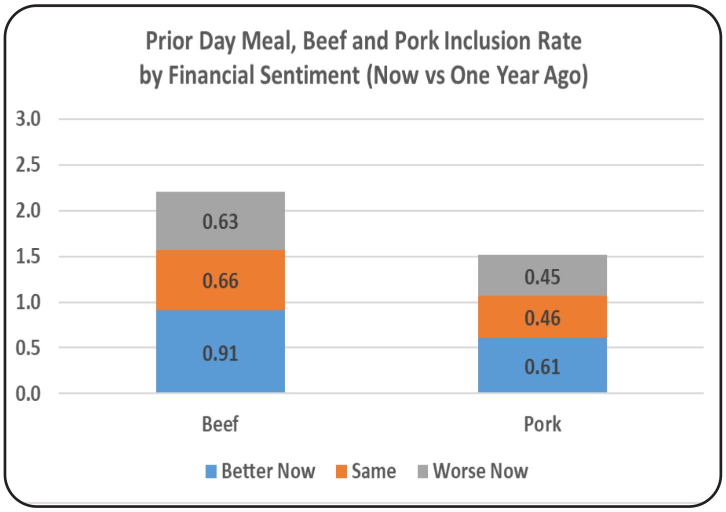


Ad Hoc Questioning

Each month questions assess financial sentiment. Given the broader macroeconomic situation, it is not surprising to observe residents are more likely to indicate their current financial situation is worse than it was one year earlier.

To provide initial insight on how financial sentiment impacted meat consumption in April, prior day recall data is tabulated. Frequency of beef and pork being included in prior day meals is notably higher for those indicating current finances are better than last year. This is not surprising and speaks to underling heterogeneity in the U.S. population and corresponding differences in beef and pork demand early in 2023.





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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