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
Jul-20	WTP ($/lb)	$16.17	$7.59	$6.38	$5.17	$7.48	$7.71	$8.80	$2.19	
	Market Share	7%	23%	14%	8%	27%	2%	4%	7%	9%
Aug-20	WTP ($/lb)	$16.35	$6.98	$5.63	$3.98	$6.99	$7.82	$8.31	$1.36	
	Market Share	9%	21%	13%	7%	24%	3%	5%	7%	11%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jul-20	WTP ($/meal)	$25.65	$18.40	$14.41	$17.75	$17.30	$12.52	$17.48	$17.80	
	Market Share	15%	22%	4%	10%	15%	5%	14%	8%	7%
Aug-20	WTP ($/meal)	$25.52	$18.96	$13.08	$17.04	$17.86	$12.86	$17.20	$17.97	
	Market Share	15%	22%	4%	10%	15%	5%	14%	8%	7%

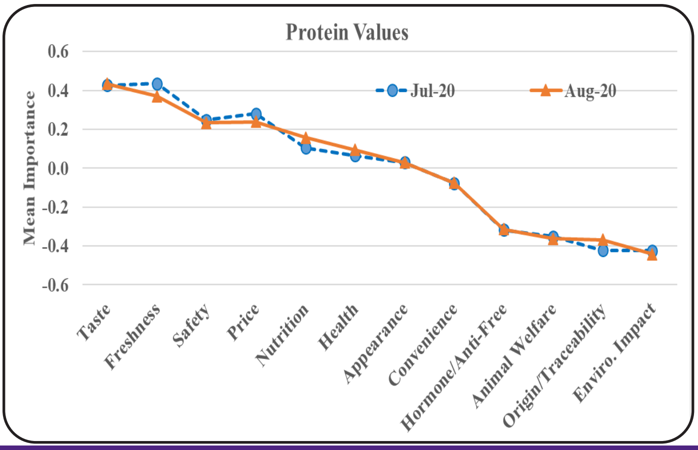
Willingness-to-pay (WTP) decreased for six evaluated products in Retail and decreased for four evalauted meals in August compared to July. WTP increased for Ribeye Steak in Retail and Beef Hamburger in Food Service.

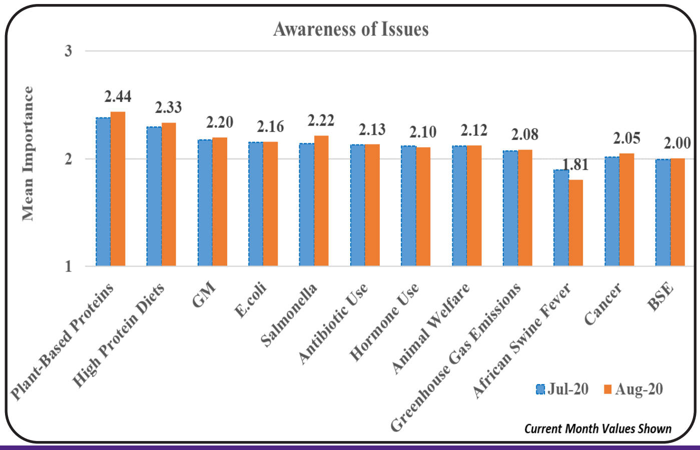
The combined beef and pork projected market shares for August are 30% and 20%, respectively at the grocery store and 36% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Nutrition and Origin/ Traceability increased most in importance while Freshness and Price 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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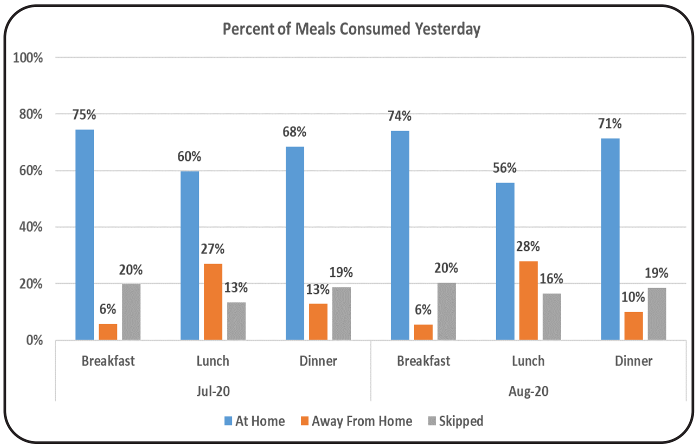
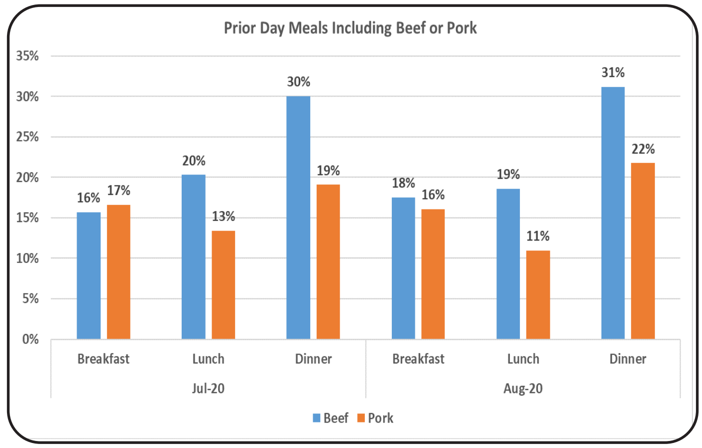
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 56%, and 71% consumed breakfast, lunch, and dinner at home in August.

In August, 18%, 19%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 16%, 11%, and 22% of these meals.

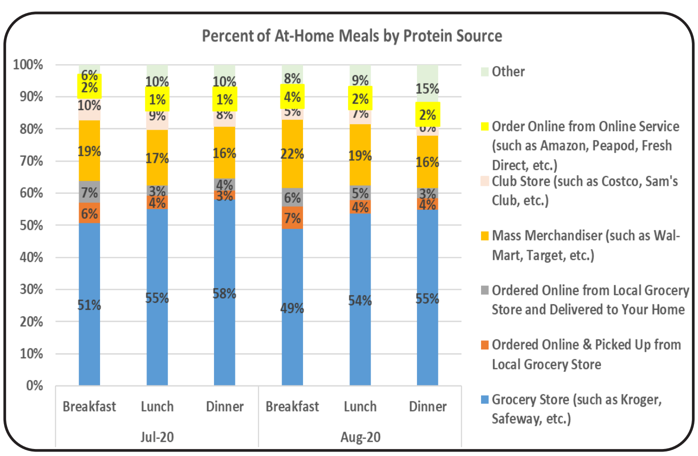


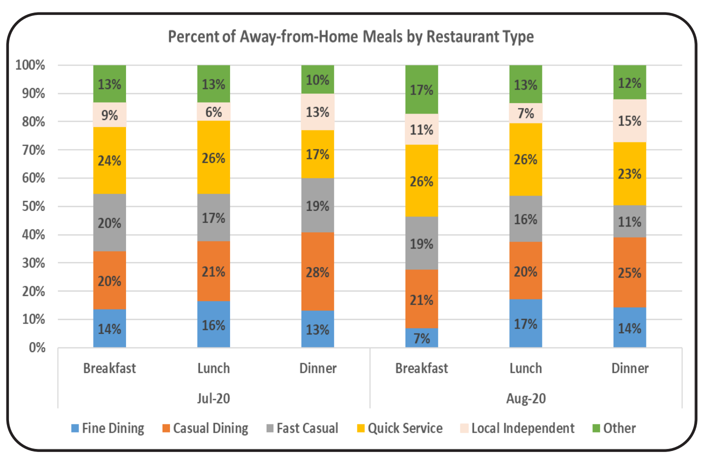


Prior Day Meals: At-Home Protein Source & Restaurant Type

In August, the protein source for at-home meals was predominantly Grocery Stores. The combination of fully in-person, ordered online and picked-up at store, and ordered online and delivered accounted for 62%, 62%, and 62% of the protein sourcing of at-home 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 leads for dinner meals. Combined, Casual Dining, Fast Casual, and Quick Service comprise 65%, 63%, and 59% of breakfast, lunch, and dinner meals.





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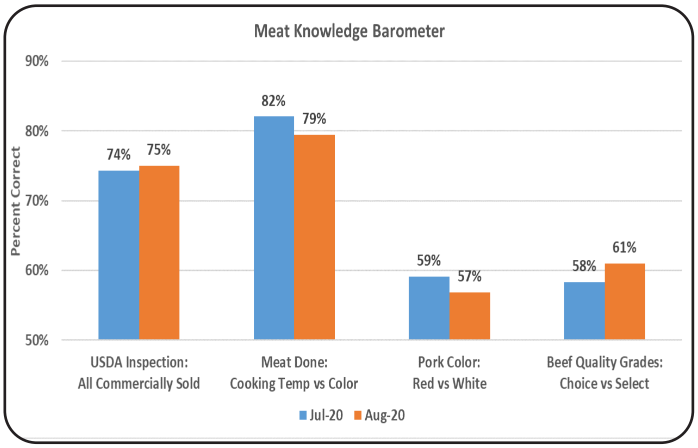
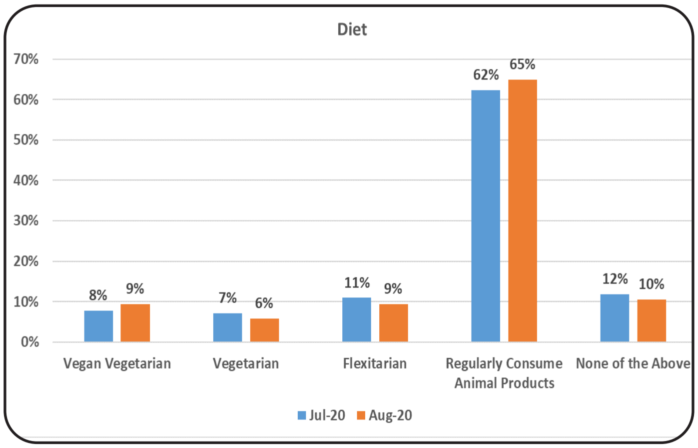
Additional MDM Project details are available at: https://www.agmanager.info/

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 August, 65% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 15% indicate they are either Vegan Vegetarian or Vegetarian. A decrease in "None" being selected breaks trend from recent months.

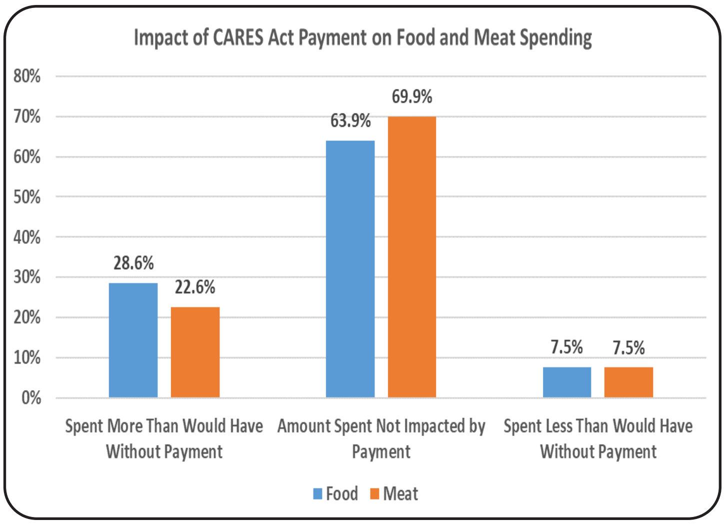




Ad Hoc Questioning

In August a sequence of ad hoc questions asked respondents about CARES Act payment amounts, timing, and impacts on spending. Over 85% indicate receiving a payment with the two most common amounts being $1,001-$1,500 (34%) and $2,001-$2,500 (20%). The majority reported funds being received in April (32%), May (29%), and June (17%).

To assess possible consumer impacts on "Food" and "Meat" spending, respondents indicating they received a CARES Act payment were asked "What best describes the impact of receiving this payment?" Overal, the impact on Meat spending was a little lower than for Food more broadly. The most prevalent response was no impact, with 23% (29%) saying receipt of a CARES Act payment increased Meat (Food) spending.



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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