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 |
|---|---|---|---|---|---|---|---|---|---|
| Nov-21 WTP ($/lb) | $17.94 | $8.67 | $7.26 | $6.42 | $8.55 | $9.31 | $10.04 | $3.88 | |
| Market Share | 8% | 23% | 13% | 8% | 26% | 3% | 4% | 8% | 6% |
| Dec-21 WTP ($/lb) | $18.22 | $9.28 | $7.89 | $6.63 | $9.01 | $8.98 | $9.32 | $3.32 | |
| Market Share | 9% | 24% | 14% | 9% | 25% | 3% | 4% | 7% | 6% |

| FOOD SERVICE | Ribeye Steak | Beef Hamburger | Pork Chop | Baby Back Ribs | Chicken Breast | Plant-Based Patty | Shrimp | Salmon | Something Else |
|---|---|---|---|---|---|---|---|---|---|
| Nov-21 WTP ($/meal) | $28.10 | $20.84 | $16.48 | $19.35 | $19.07 | $13.79 | $18.19 | $19.76 | |
| Market Share | 16% | 24% | 5% | 10% | 15% | 4% | 12% | 8% | 5% |
| Dec-21 WTP ($/meal) | $27.87 | $20.74 | $16.98 | $19.41 | $18.45 | $13.94 | $19.16 | $19.75 | |
| Market Share | 16% | 23% | 5% | 10% | 13% | 4% | 14% | 8% | 5% |

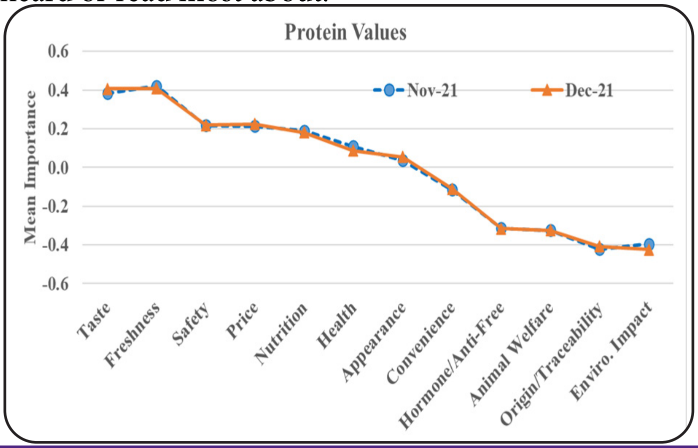
Willingness-to-pay (WTP) increased for 5 evaluated Retail products, including both beef and pork items, in December compared to November. Meanwhile WTP increased for 4 evaluated Food Service meals, including both pork meals.

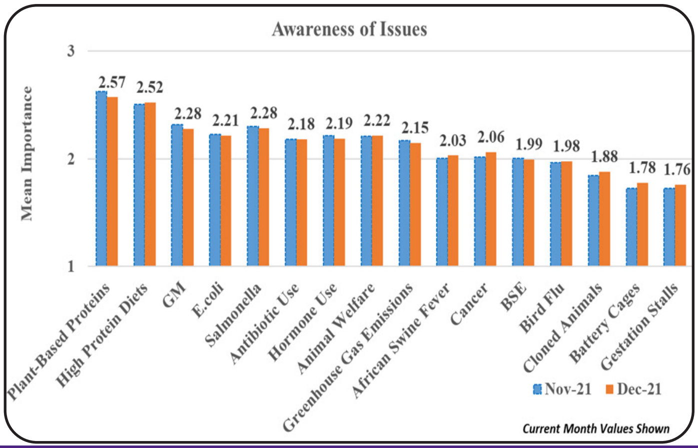
The combined beef and pork projected market shares for December are 32% and 23%, respectively at the grocery store and 39% and 16% at the restaurant.

## Protein Values & Issues Awareness

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

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

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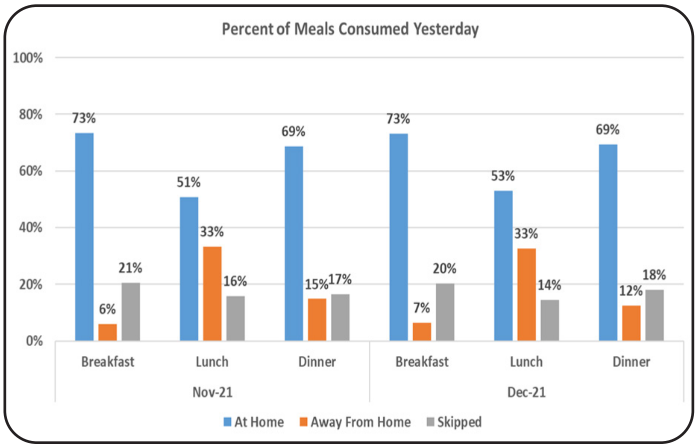
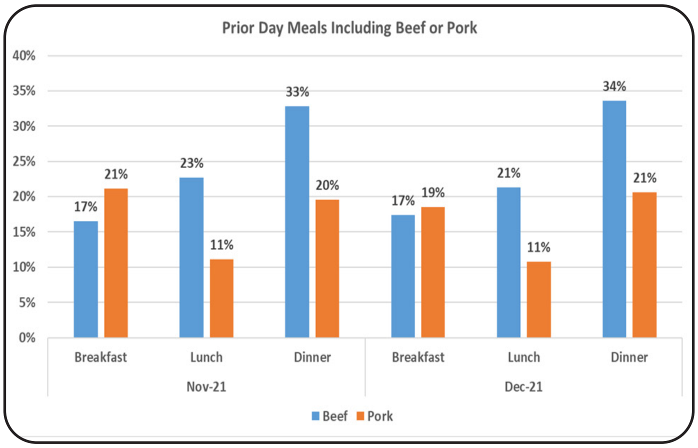
## Prior Day Meals: Location & Protein Consumption Frequency

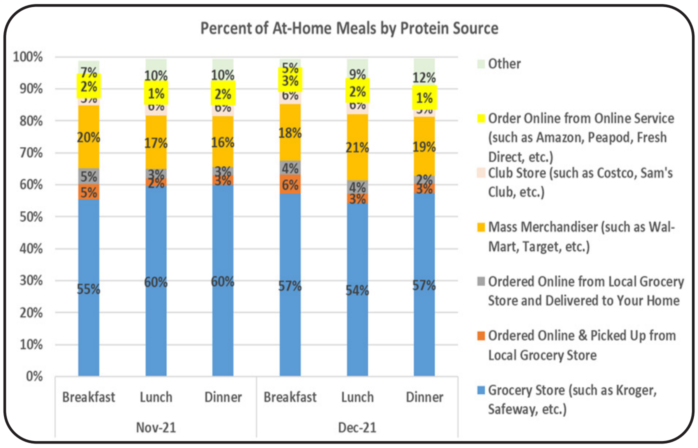
Respondents indicate 73%, 53%, and 69% consumed breakfast, lunch, and dinner at home in December. In December, 17%, 21%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 11%, and 21% of these meals.

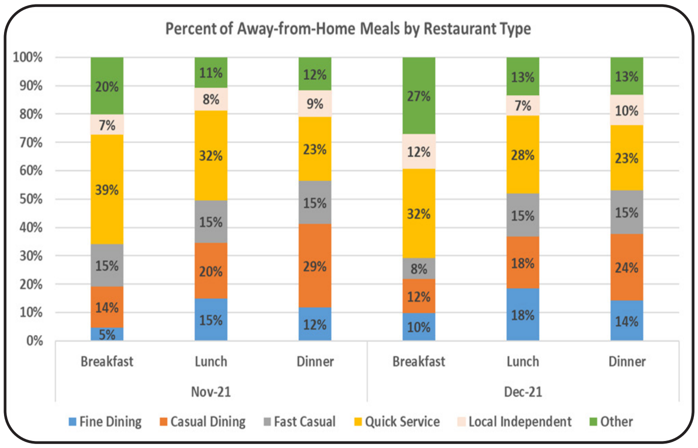



## Prior Day Meals: At-Home Protein Source & Restaurant Type

In December, 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 51%, 61%, and 62% of breakfast, lunch, and dinner meals in December.

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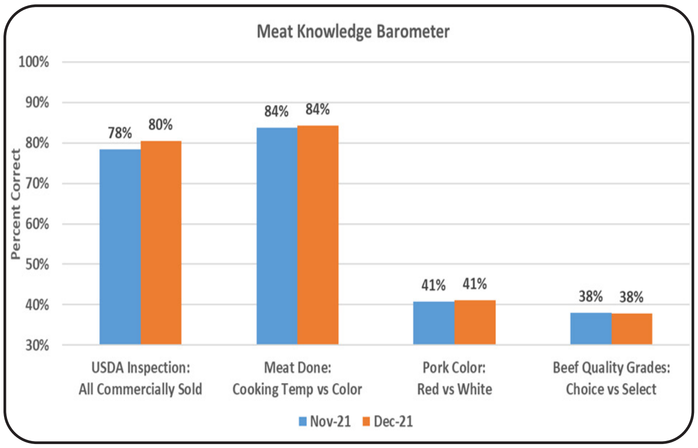
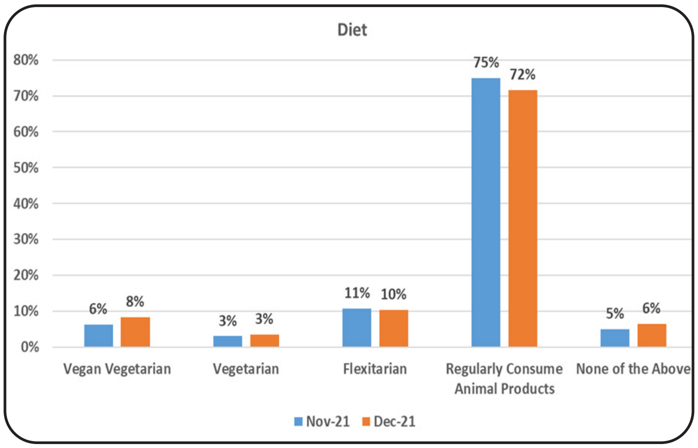
Additional MDM Project details are available at: https://www.agmanager.info/

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

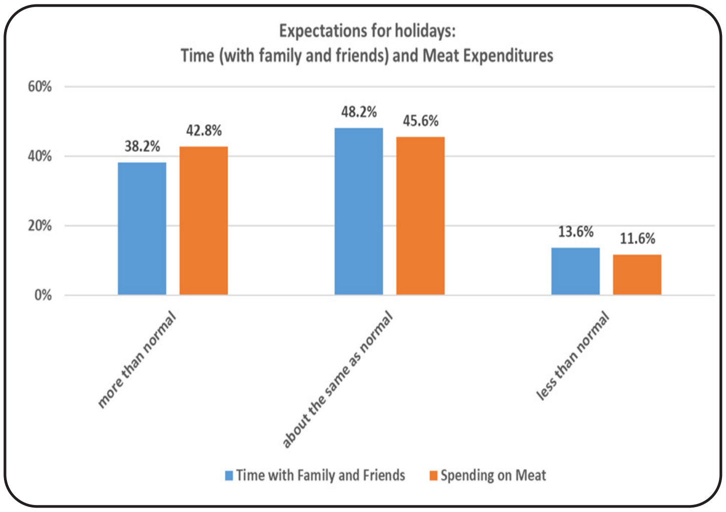
In December, 72% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 12% indicate they are either Vegan Vegetarian or Vegetarian.




## Ad Hoc Questioning

A couple questions about holiday plans asked in December of 2020 were repeated. The intent was to extend insight on consumer expectations regarding time spent with family and friends as well as the amount spent on meat during holiday celebrations. Overall the amount of time with family and friends as well as planned meat expenditures were up notably from 2020 levels indicating holiday meat demand support. Specifically, 38%, 48%, and 14% plan to spend more, the same, and less than normal time with family and friends. Meanwhile, 43%, 46%, and 12% expect to spend more, the same, and less than normal on meat in these holiday celebrations.



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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

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