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
Jan-22	WTP ($/lb)	$18.30	$9.08	$7.76	$6.56	$8.95	$9.66	$9.77	$3.75	
	Market Share	9%	23%	14%	8%	26%	3%	4%	7%	6%
Feb-22	WTP ($/lb)	$17.33	$9.13	$7.63	$6.16	$8.92	$9.89	$10.22	$3.44	
	Market Share	7%	23%	13%	8%	25%	4%	5%	8%	7%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jan-22	WTP ($/meal)	$27.96	$20.55	$16.09	$19.05	$18.32	$14.39	$17.96	$19.45	
	Market Share	17%	24%	5%	10%	14%	5%	12%	8%	5%
Feb-22	WTP ($/meal)	$28.80	$21.64	$16.65	$20.67	$20.81	$15.58	$19.48	$20.09	
	Market Share	15%	22%	5%	11%	17%	5%	12%	8%	5%

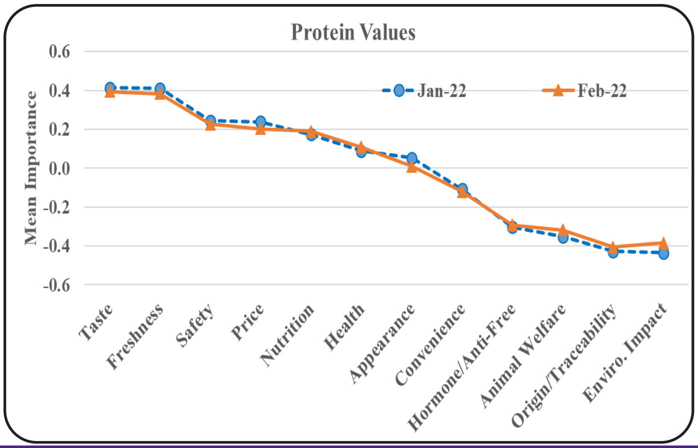
Willingness-to-pay (WTP) increased for 3 evaluated Retail products, in February compared to January. Meanwhile WTP increased for all 8 evaluated Food Service meals.

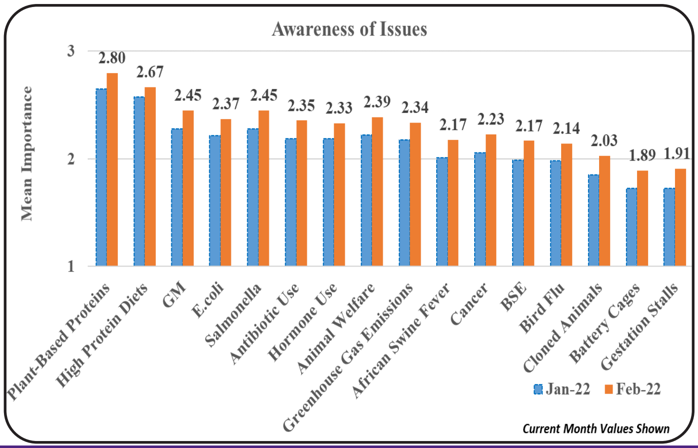
The combined beef and pork projected market shares for February are 30% and 21%, respectively at the grocery store and 38% and 15% at the restaurant.

Protein Values & Issues Awareness

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

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





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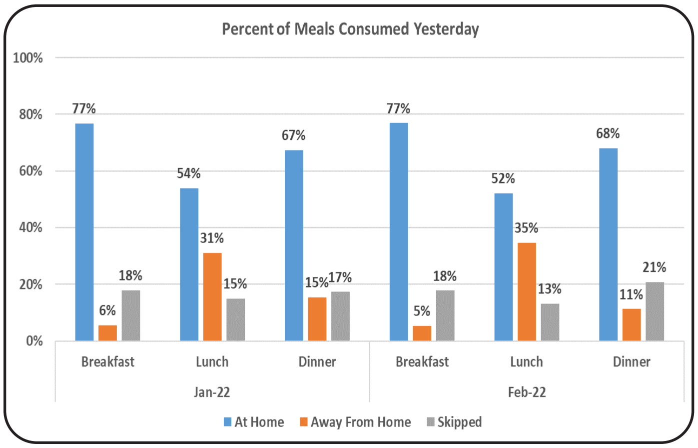
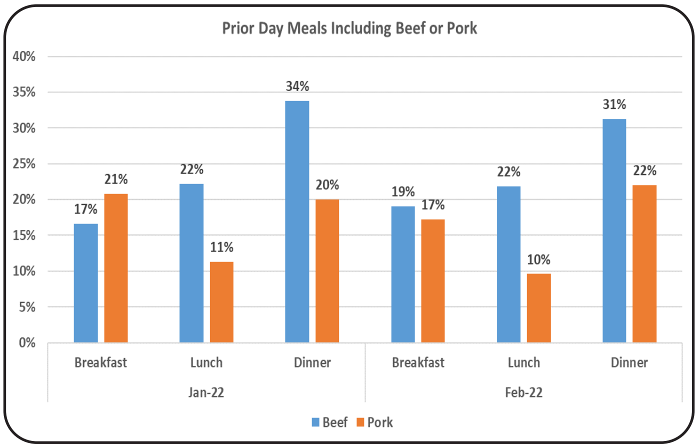
Prior Day Meals: Location & Protein Consumption Frequency

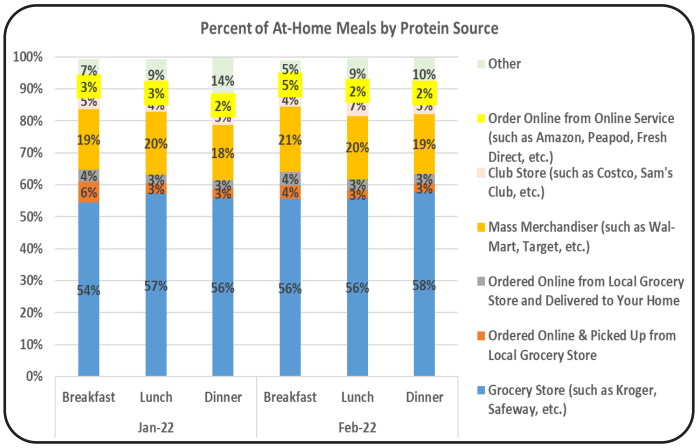
Respondents indicate 77%, 52%, and 68% consumed breakfast, lunch, and dinner at home in February. In February, 19%, 22%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 10%, and 22% of these meals.

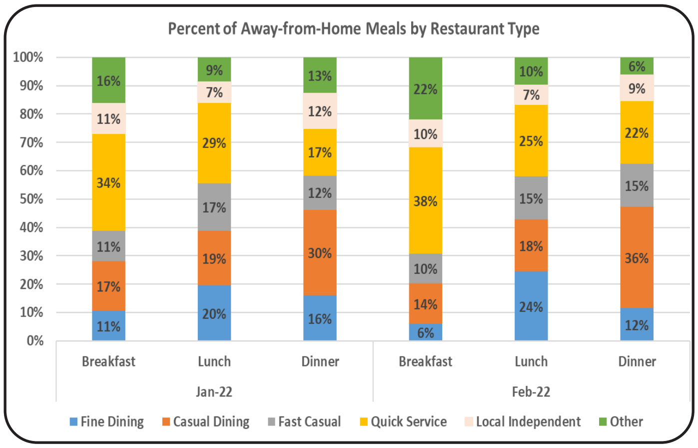




Prior Day Meals: At-Home Protein Source & Restaurant Type

In February, 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 62%, 59%, and 73% of breakfast, lunch, and dinner meals in February.





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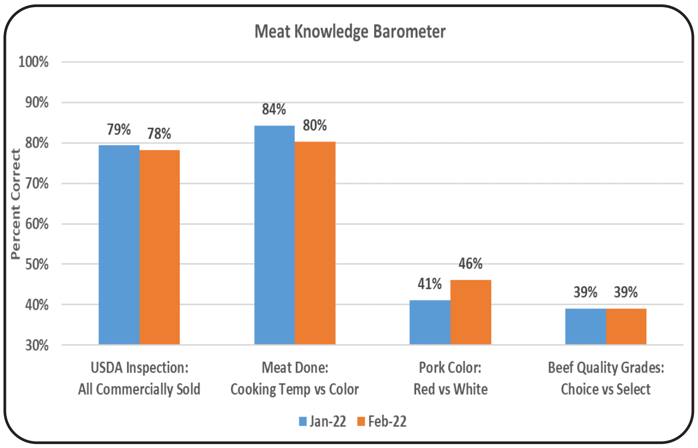
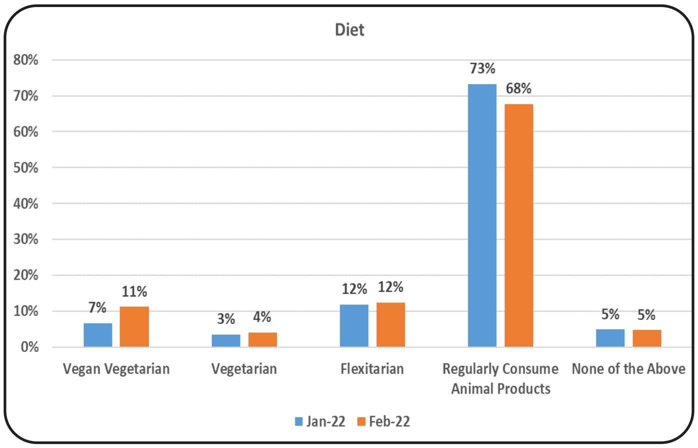
Meat Knowledge & Personal Diet

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 February, 68% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 15% indicate they are either Vegan Vegetarian or Vegetarian.

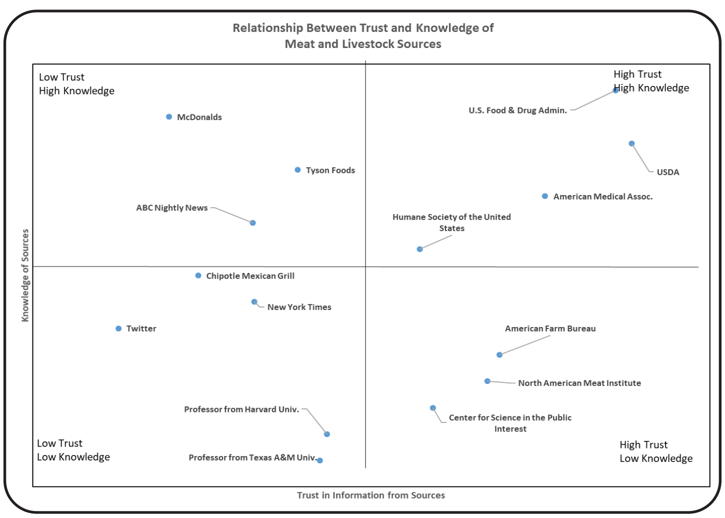


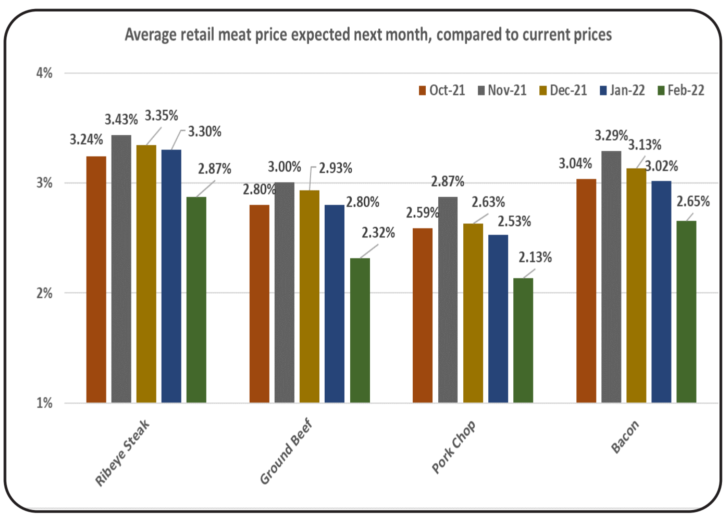


Ad Hoc Questioning

As done in Feb. of last year, we accessed knowledge and trust of 15 information sources. Overall, consumer trust and awareness is similar to prior year levels.

We also repeated prior month questions gathering retail meat price expectations. Consumers expect lower rates of price increases in March, continuing a trend since the peak in retail price expectations in November.





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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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