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 |
|---|---|---|---|---|---|---|---|---|---|
| Dec-20 WTP ($/lb) | $16.10 | $7.39 | $6.06 | $4.75 | $6.99 | $7.61 | $8.47 | $1.66 | |
| Market Share | 7% | 24% | 14% | 8% | 24% | 3% | 5% | 6% | 10% |
| Jan-21 WTP ($/lb) | $16.59 | $7.13 | $6.20 | $4.43 | $7.07 | $8.08 | $8.56 | $2.50 | |
| Market Share | 9% | 21% | 14% | 7% | 24% | 3% | 5% | 8% | 10% |

| FOOD SERVICE | Ribeye Steak | Beef Ham-burger | Pork Chop | Baby Back Ribs | Chicken Breast | Plant-Based Patty | Shrimp | Salmon | Something Else |
|---|---|---|---|---|---|---|---|---|---|
| Dec-20 WTP ($/meal) | $24.73 | $17.60 | $11.97 | $16.89 | $15.68 | $12.11 | $17.28 | $16.88 | |
| Market Share | 14% | 22% | 3% | 10% | 13% | 5% | 16% | 8% | 8% |
| Jan-21 WTP ($/meal) | $25.54 | $18.27 | $13.90 | $17.01 | $15.85 | $11.98 | $16.27 | $17.46 | |
| Market Share | 16% | 23% | 4% | 10% | 13% | 5% | 13% | 8% | 8% |

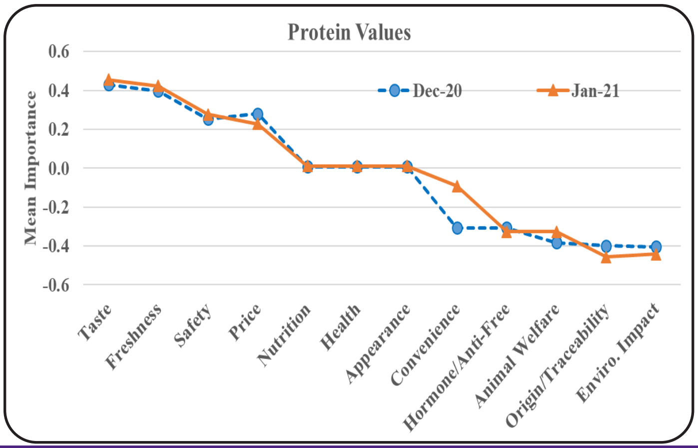
Willingness-to-pay (WTP) increased for six evaluated products in Retail including Ribeye Steak and Pork Chops in January compared to December. WTP increased for six evaluated Food Service meals including all four of the meals with beef and pork entrees.

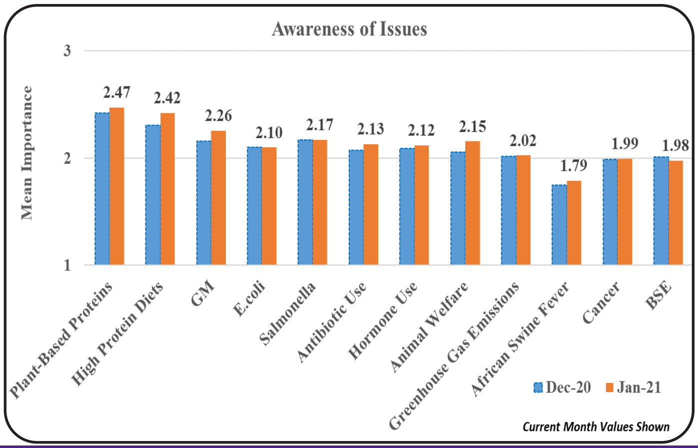
The combined beef and pork projected market shares for January are 29% and 21%, respectively at the grocery store and 39% and 15% at the restaurant.

## Protein Values & Issues Awareness

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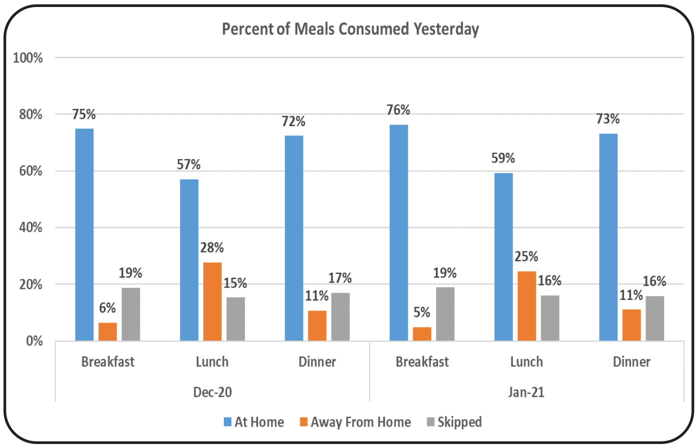
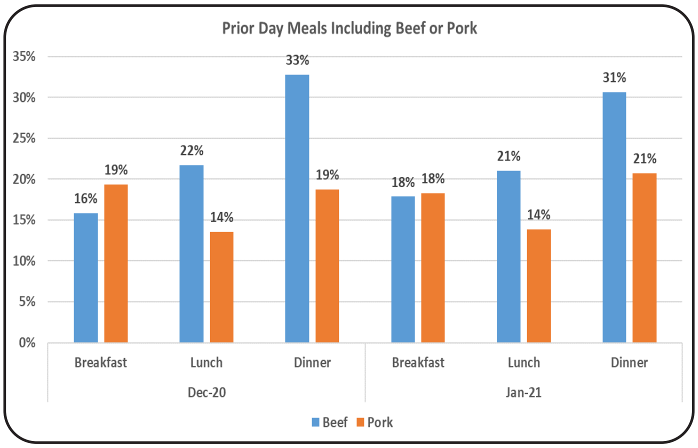
# Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 76%, 59%, and 73% consumed breakfast, lunch, and dinner at home in December - all values being higher than in December.

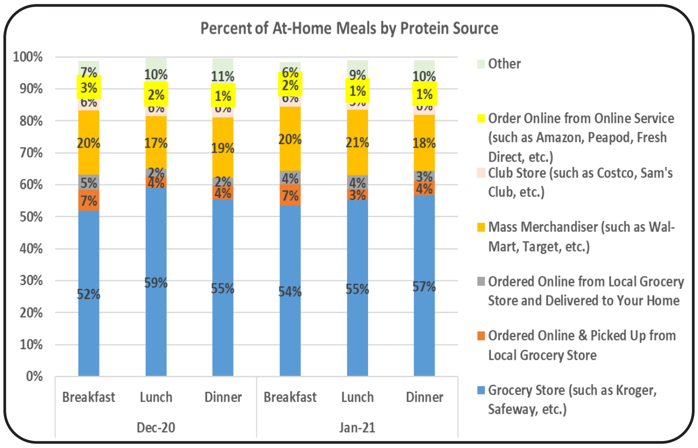
In January, 18%, 21%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 14%, and 21% of these meals.

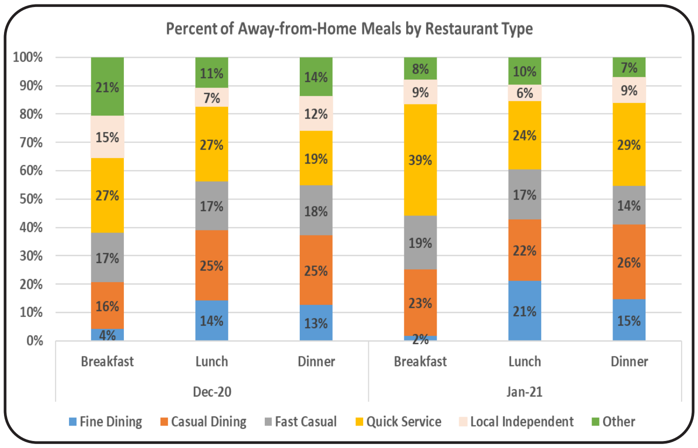



# Prior Day Meals: At-Home Protein Source & Restaurant Type

In January, 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, lunch, and dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 82%, 64%, and 69% of breakfast, lunch, and dinner meals in January.

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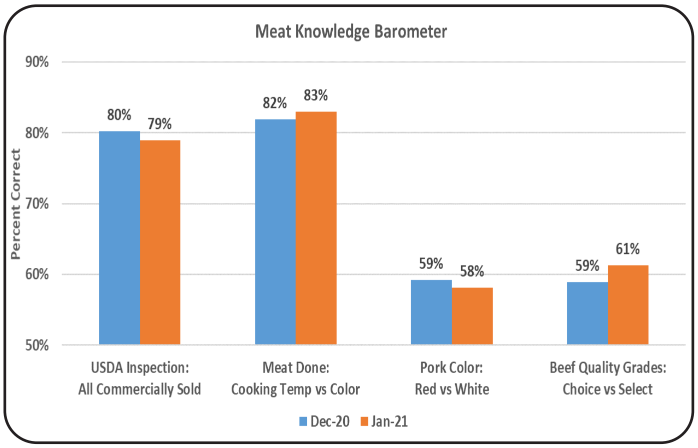
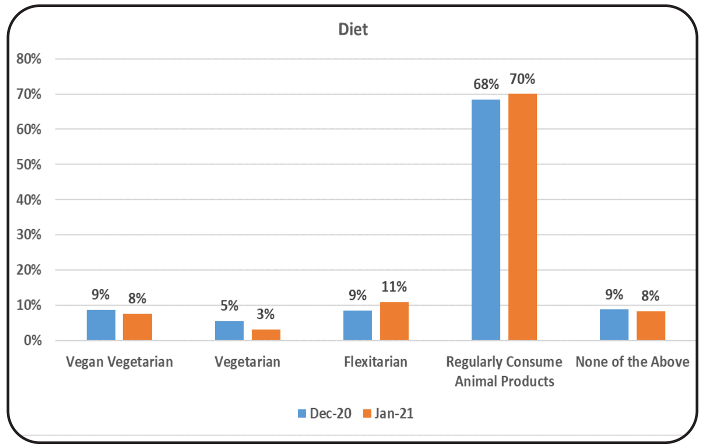
## Meat Knowledge & Personal Diet

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.

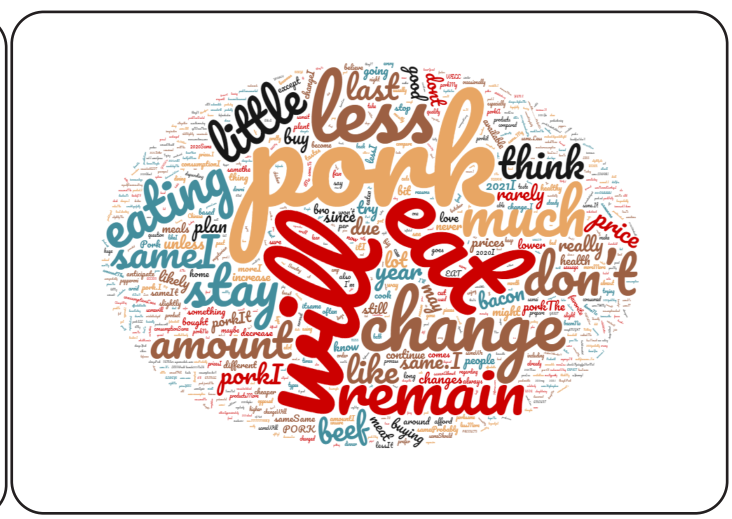
In January, 70% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.




## Ad Hoc Questioning

Given the new year, the January survey included an open-ended question: "In your own words, please describe how you expect your BEEF consumption in 2021 to compare with 2020." Respondents were also asked a parallel question regarding PORK consumption. The following word clouds are used to show the relative frequency of words in provided responses (beef on left; pork on the right). Taken broadly for both beef and pork, responses including "increase," "remain," "same," and "stay" outnumber those including "less" indicating most consumers expect to sustain or grow beef and pork consumption in 2021.



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

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