KANSAS STATE

Department of Agricultural Economics

MDM: Meat Demand Monitor

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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-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%
Jan-22 WTP (\$/lb)	\$18.30	\$9.08	\$7.76	\$6.56	\$8.95	\$9.66	\$9.77	\$3.75	
Market Share	8%	21%	12%	7%	24%	3%	4%	7%	14%
FOOD SERVICE	Ribeye	Beef Ham-	Pork	Baby Back	Chicken	Plant-Based	Shrimp	Salmon	Something
	Steak	burger	Chop	Ribs	Breast	Patty			Else
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%
Jan-22 WTP (\$/meal)	\$27.96	\$20.55	\$16.09	\$19.05	\$18.32	\$14.39	\$17.96	\$19.45	
Market Share	15%	22%	4%	9%	13%	5%	11%	8%	14%

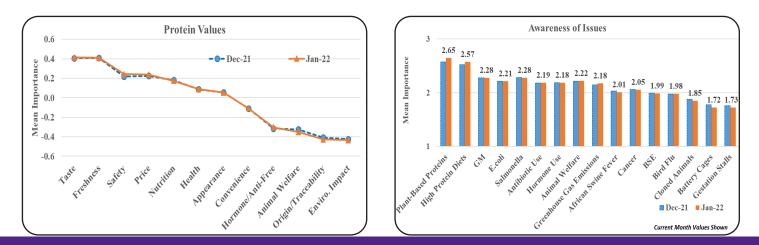
Willingness-to-pay (WTP) increased for 4 evaluated Retail products, including Ribeye Steak, in January compared to December. Meanwhile WTP decreased for 6 evaluated Food Service meals.

The combined beef and pork projected market shares for January are 29% and 20%, respectively at the grocery store and 37% and 14% at the restaurant.

Protein Values & Issues Awareness

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

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

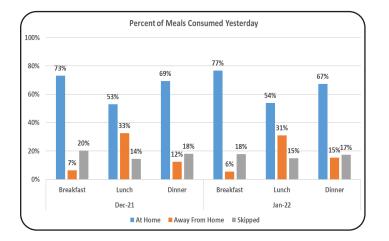


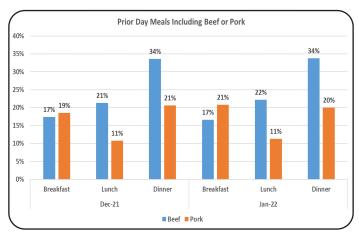


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Prior Day Meals: Location & Protein Consumption Frequency

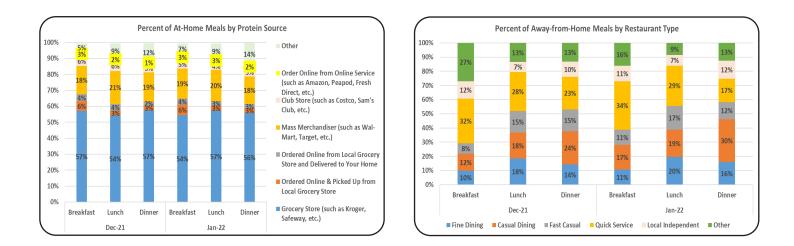
Respondents indicate 77%, 54%, and 67% consumed breakfast, lunch, and dinner at home in January with both breakfast and lunch at-home meal rates higher than in December. In January, 17%, 22%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 21%, 11%, and 20% of these 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 awayfrom-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 63%, 65%, and 59% of breakfast, lunch, and dinner meals in January.



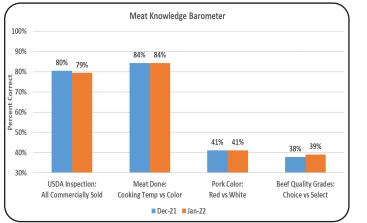


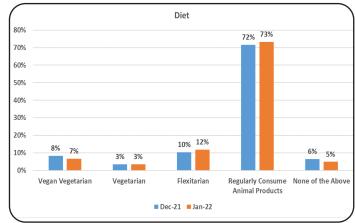
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Meat Knowledge & Personal Diet

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 January, 73% 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

As done in January 2021, with the new year an open-ended question was included: "In your own words, please describe how you expect your BEEF consumption in 2022 to compare with 2021." Respondents were also asked a parallel PORK question. The following word clouds show the relative frequency of provided responses (Beef on left; Pork on right). Considered broadly, responses indicating more or similar consumption levels outnumber those indicating a reduction - combined this aligns with strong meat demand as 2022 begins.



For more information about this publication and others, visit AgManager.info. K-State Agricultural Economics • 342 Waters Hall, Manhattan, KS 66506-4011 • 785-532-1504 Copyright 2022 AgManager.info, K-State Department of Agricultural Economics 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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Funded in part by the Beef Checkoff.





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