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-22	WTP ($/lb)	$17.06	$8.37	$7.04	$5.63	$8.02	$8.35	$9.02	$2.92	
	Market Share	8%	24%	14%	8%	25%	3%	4%	7%	8%
Jan-23	WTP ($/lb)	$17.64	$8.79	$7.56	$5.96	$8.57	$8.07	$9.02	$3.08	
	Market Share	8%	24%	14%	8%	26%	2%	4%	7%	7%

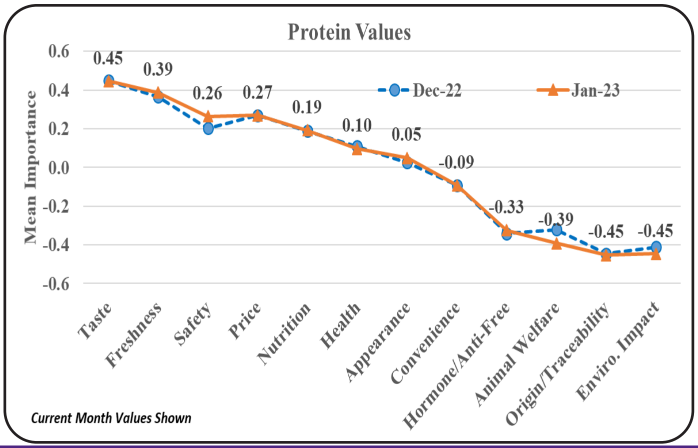
FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Dec-22	WTP ($/meal)	$26.20	$19.60	$15.50	$18.57	$17.80	$13.59	$18.06	$18.71	
	Market Share	14%	24%	5%	10%	14%	5%	14%	8%	6%
Jan-23	WTP ($/meal)	$26.61	$19.62	$15.33	$18.83	$18.25	$13.10	$18.46	$19.30	
	Market Share	15%	23%	4%	11%	15%	4%	14%	9%	6%

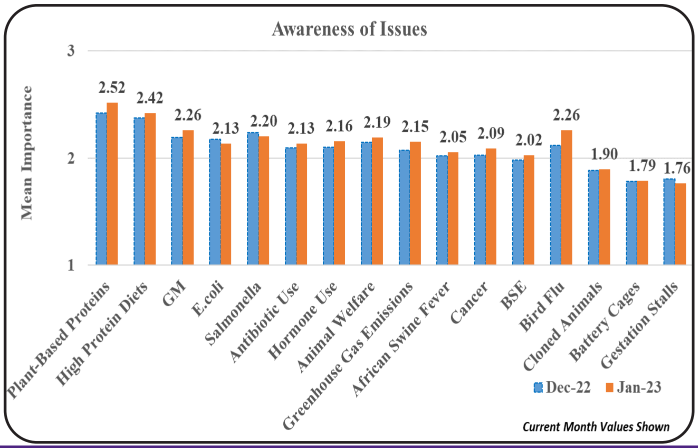
Willingness-to-pay (WTP) increased for all evaluated Retail products, except Plant-Based patty and Shrimp, in January compared to December. WTP increased for all evaluated Food Service meals except Pork Chop and Plant-Based Patty. Demand for all examined retail products and food service dinner meals was lower in January of 2023 than in January of 2022.

The combined beef and pork projected market shares for January are 32% and 22%, respectively at the grocery store and 38% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. The importance of Safety increased most since December with Animal Welfare declining most in importance. Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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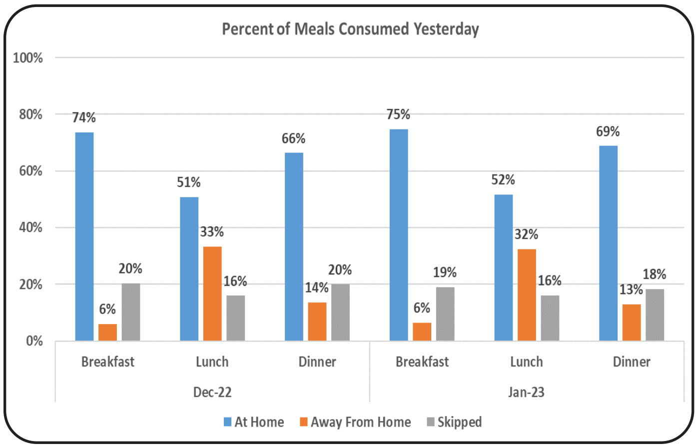
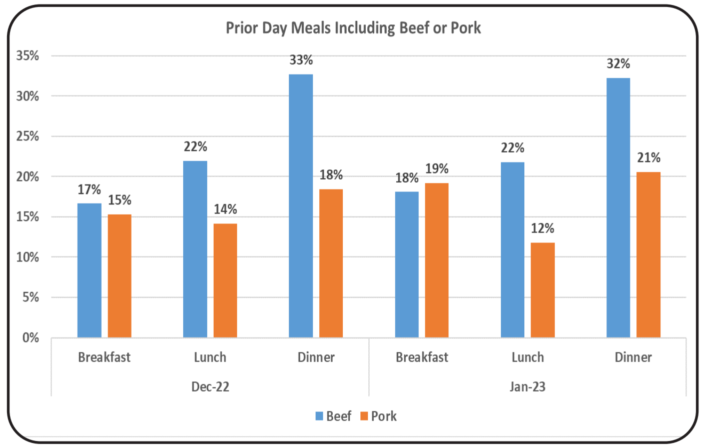
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 75%, 52%, and 69% consumed breakfast, lunch, and dinner at home in January with all three rates higher than in December. In January, 18%, 22%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 21% of these meals.

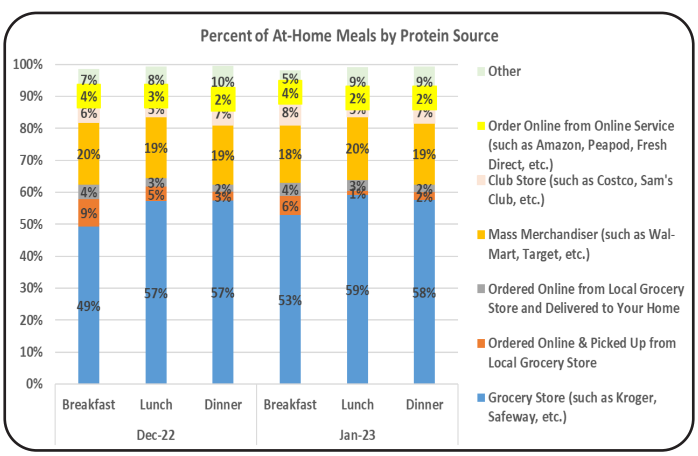


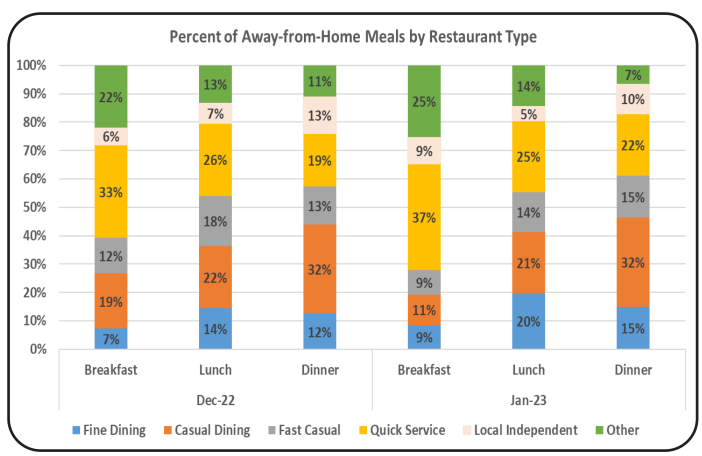


Prior Day Meals: At-Home Protein Source & Restaurant Type

In January, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 25%, and 26% of 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 led for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 57%, 61%, and 68% of breakfast, lunch, and dinner meals in January.





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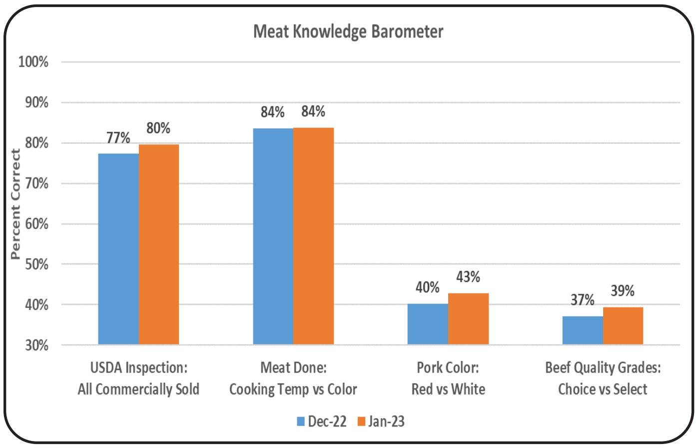
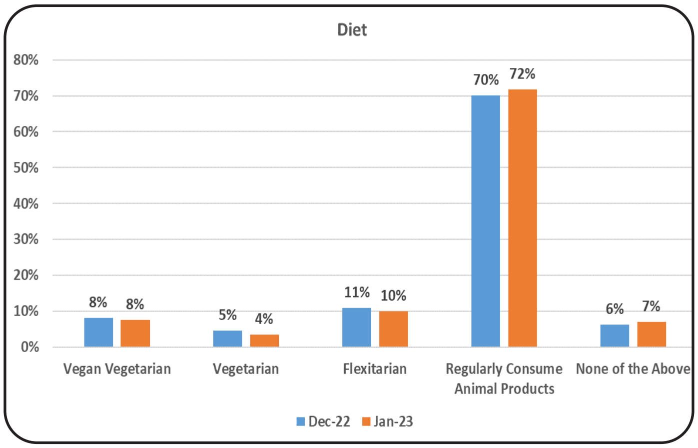
Additional MDM Project details are available at: https://www.agmanager.info/

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.

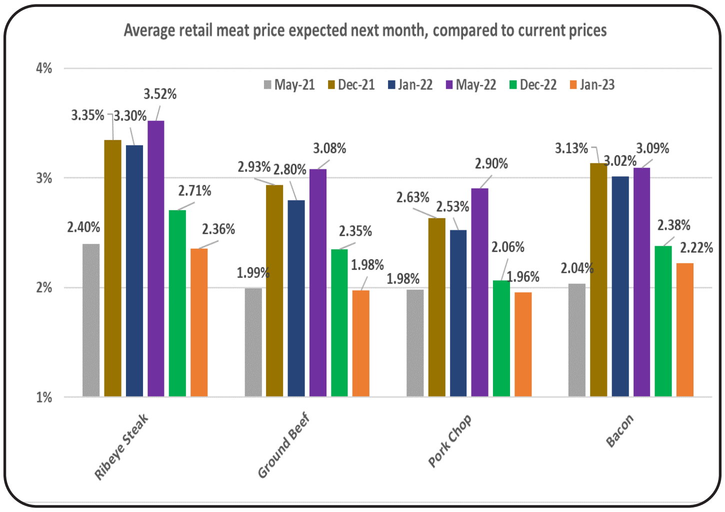
In January, 72% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.

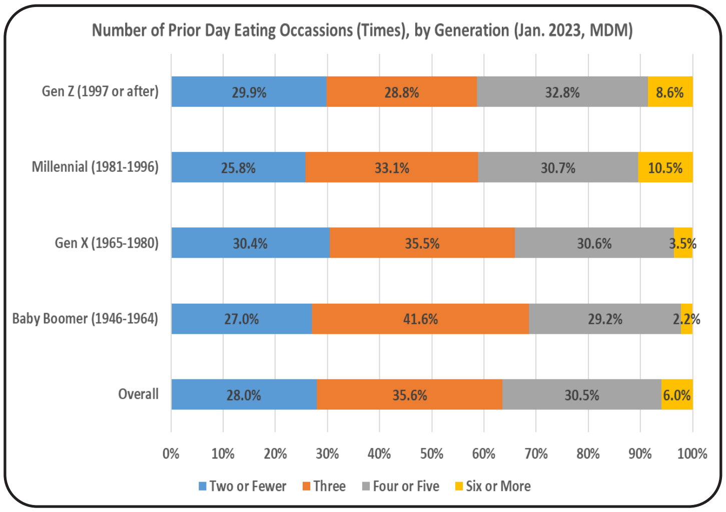




Ad Hoc Questioning

Early in 2023, both inflation expectations and frequency of eating are worth assessing. Consumer expectations on future retail meat prices appear to be moderating. Specifically, beef and pork retail prices are expected to increase in February but by the lowest amounts since May 2021, perhaps aligning with broader moderation of inflation trends. The number of eating occassions (including both meals and snacks) is most frequently three, aligning with traditional breakfast, lunch, and dinner meals. Those consuming food four or more times a day outnumbers those with two or fewer eating occassions. This pattern is strongest for younger generations, perhaps with elevated importance of convenience and/or portion size in protein purchasing decisions.





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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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