**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 |
|---|---|---|---|---|---|---|---|---|---|---|
| Jun-23 | WTP ($/lb) | $16.76 | $8.46 | $6.97 | $5.58 | $8.11 | $8.46 | $9.52 | $2.68 | |
| | Market Share | 7% | 25% | 14% | 8% | 26% | 2% | 5% | 7% | 7% |
| Jul-23 | WTP ($/lb) | $17.55 | $8.85 | $7.32 | $5.85 | $8.50 | $7.90 | $9.36 | $3.21 | |
| | Market Share | 8% | 25% | 14% | 7% | 26% | 2% | 4% | 7% | 7% |

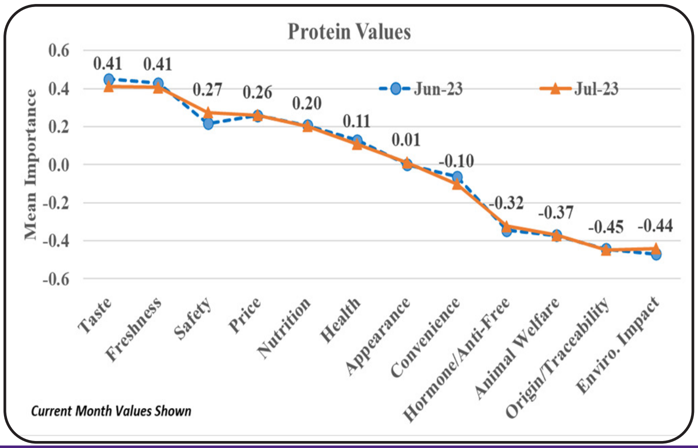
| **FOOD SERVICE** | | Ribeye Steak | Beef Ham-burger | Pork Chop | Baby Back Ribs | Chicken Breast | Plant-Based Patty | Shrimp | Salmon | Something Else |
|---|---|---|---|---|---|---|---|---|---|---|
| Jun-23 | WTP ($/meal) | $26.50 | $19.87 | $14.97 | $18.28 | $18.20 | $13.95 | $18.03 | $19.54 | |
| | Market Share | 14% | 25% | 4% | 9% | 15% | 5% | 13% | 9% | 6% |
| Jul-23 | WTP ($/meal) | $26.69 | $20.21 | $15.08 | $18.12 | $17.74 | $12.29 | $17.60 | $18.40 | |
| | Market Share | 15% | 25% | 5% | 10% | 14% | 4% | 13% | 8% | 6% |

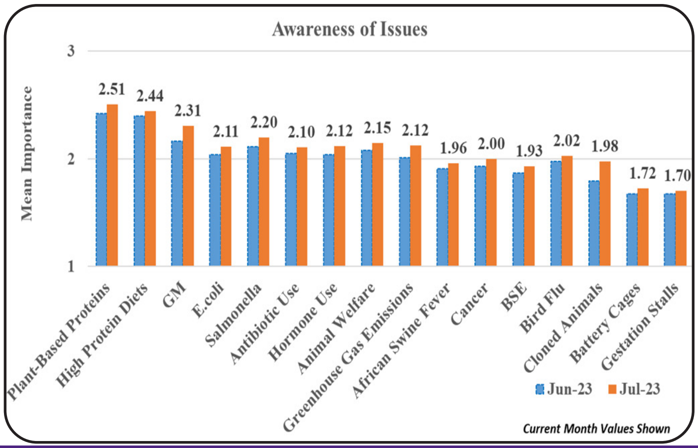
Willingness-to-pay (WTP) increased for six evaluated Retail products (all besides Plant-Based Patty & Shrimp), in July compared to June. WTP inreased for three evaluated Food Service meals.

The combined beef and pork projected market shares for July are 33% and 21%, respectively at the grocery store and 40% 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 June with Convenience declining most in importance. Plant-based Proteins and High Protein Diets remain topics heard or read most about.




Meat Demand Monitor
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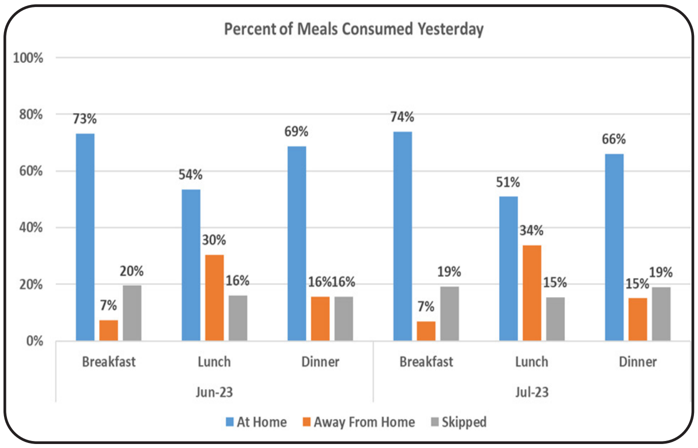
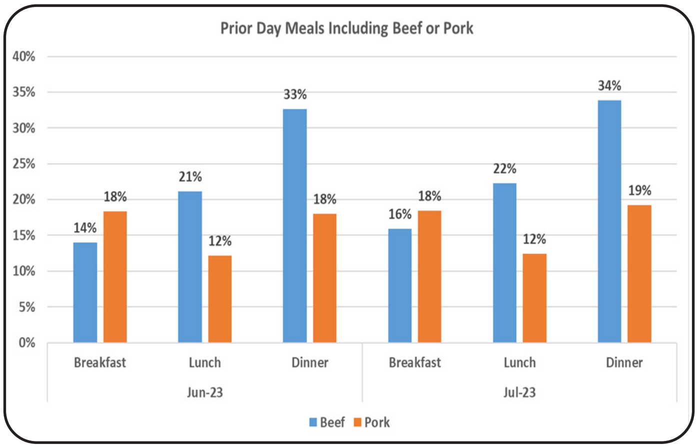
## Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 51%, and 66% consumed breakfast, lunch, and dinner at home in July with lunch and dinner meal rates being lower than in June. In July, 16%, 22%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 19% of these meals.

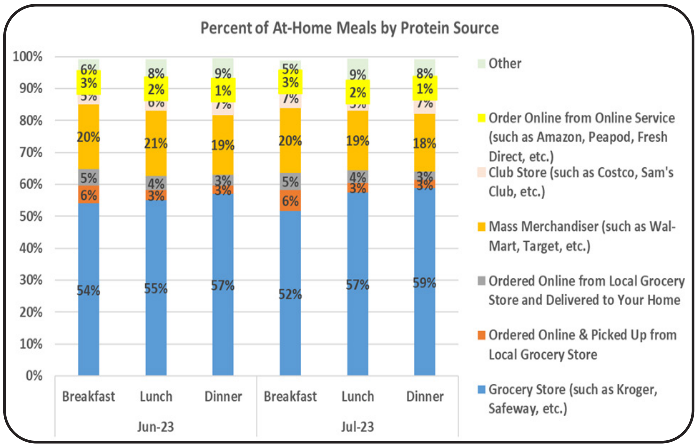


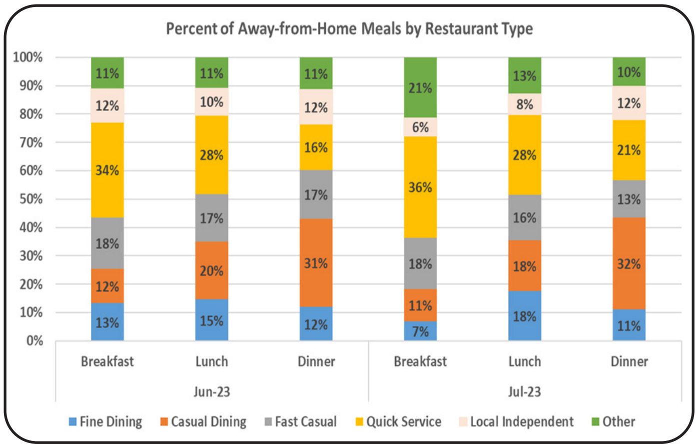




## Prior Day Meals: At-Home Protein Source & Restaurant Type

In July, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 27%, 23%, and 25% 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 65%, 62%, and 67% of breakfast, lunch, and dinner meals in July.

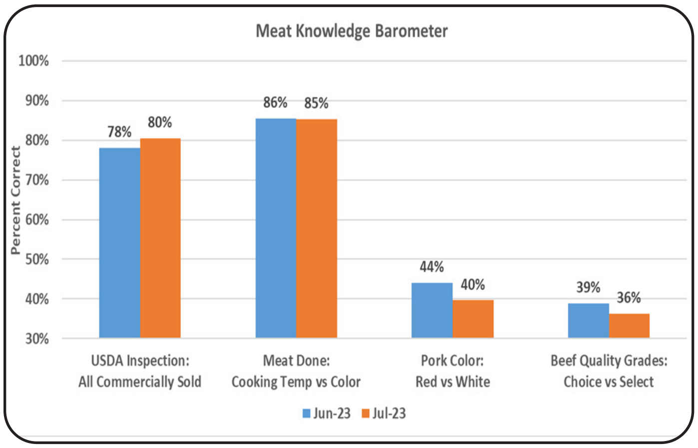


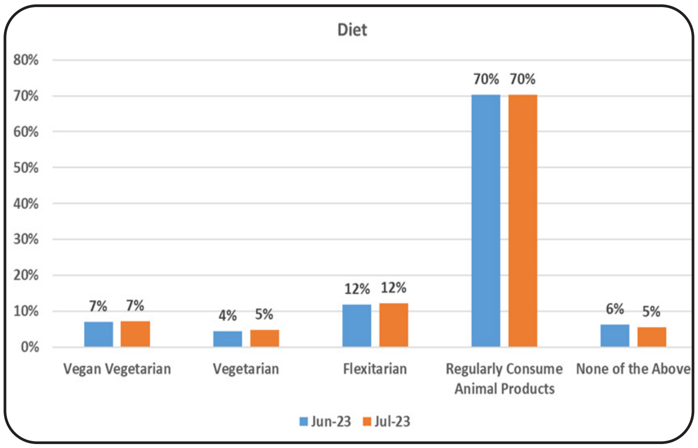



## Meat Knowledge & Personal Diet

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.

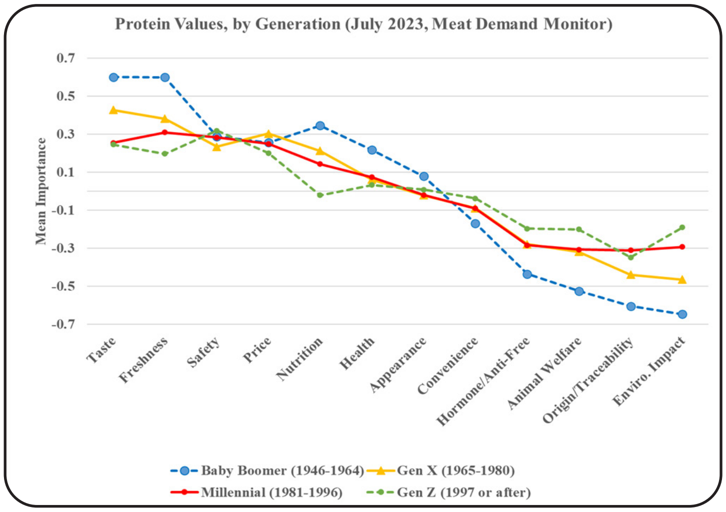
In July, 70% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 12% indicate they are either Vegan Vegetarian or Vegetarian.




## Ad Hoc Questioning

Each month, national average Protein Values are summarized on page 1 of base MDM reports. Here a breakout for July 2023 is included by generation. While the general order is consistent across cohorts, there are several instructive differences. Baby Boomers place much higher weight on Taste and Freshness and lower weight on Env. Impact, Origin/Traceability, Animal Welfare, and Hormone/Antibiotic-Free. Meanwhile Millennial and Gen X cohorts indicate very similar relative importance of these 12 factors in their protein purchase decisions.



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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