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-20	WTP ($/lb)	$15.92	$7.41	$5.71	$4.50	$7.20	$7.52	$8.22	$1.98	
	Market Share	7%	23%	12%	7%	25%	3%	4%	7%	10%
Jul-20	WTP ($/lb)	$16.17	$7.59	$6.38	$5.17	$7.48	$7.71	$8.80	$2.19	
	Market Share	7%	23%	14%	8%	27%	2%	4%	7%	9%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jun-20	WTP ($/meal)	$25.43	$18.69	$15.64	$18.35	$17.48	$12.63	$17.25	$18.14	
	Market Share	14%	23%	5%	11%	15%	4%	13%	8%	7%
Jul-20	WTP ($/meal)	$25.65	$18.40	$14.41	$17.75	$17.30	$12.52	$17.48	$17.80	
	Market Share	15%	22%	4%	10%	15%	5%	14%	8%	7%

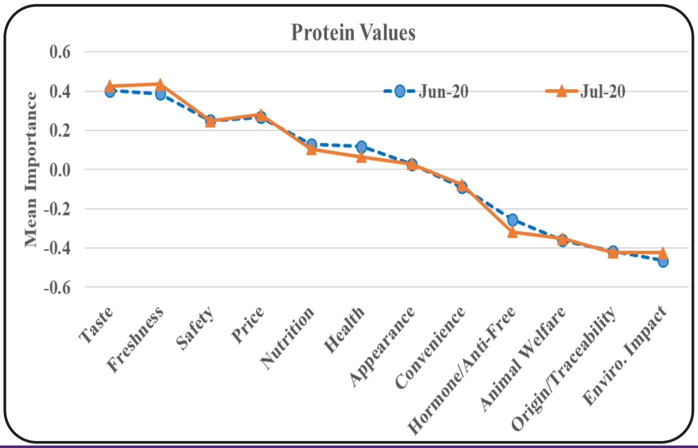
Willingness-to-pay (WTP) increased for all eight evaluated products in Retail in July compared to June. Pork Chop and Bacon Retail demand is highest since MDM began in February. WTP increased in July for Ribeye Steak in Food Service.

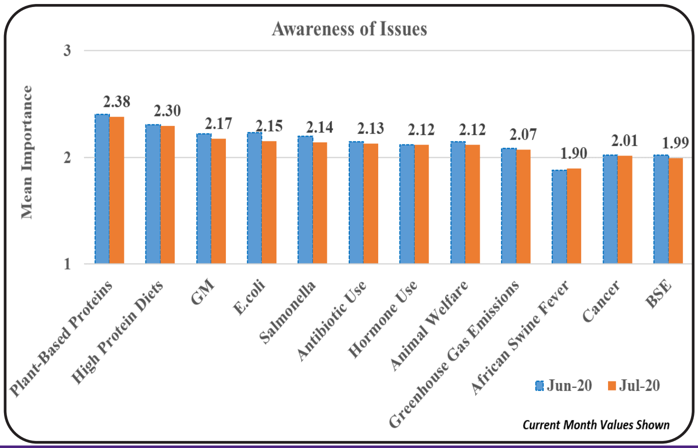
The combined beef and pork projected market shares for July are 30% and 21%, respectively at the grocery store and 36% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Freshness increased most in importance while Hormone/Antibiotic-Free decreased most from last month.

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





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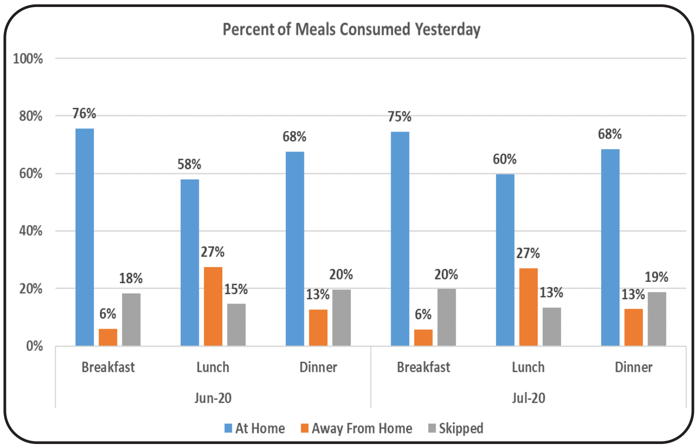
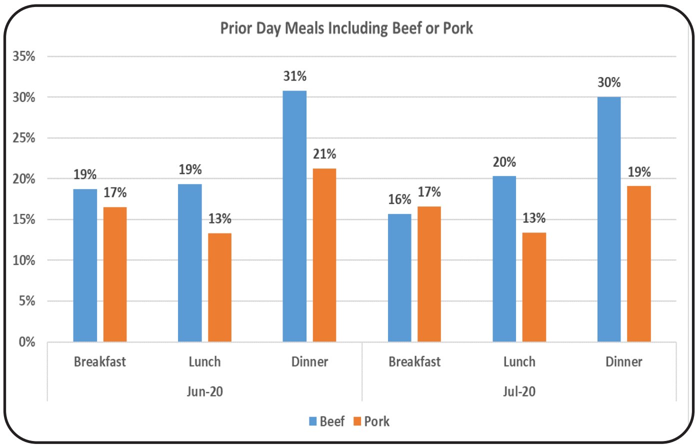
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 75%, 60%, and 68% consumed breakfast, lunch, and dinner at home in July.

In July, 16%, 20%, and 30% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 13%, and 19% of thse meals.

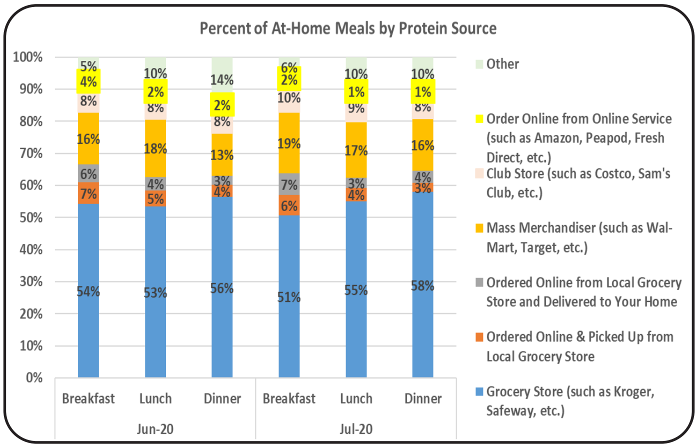


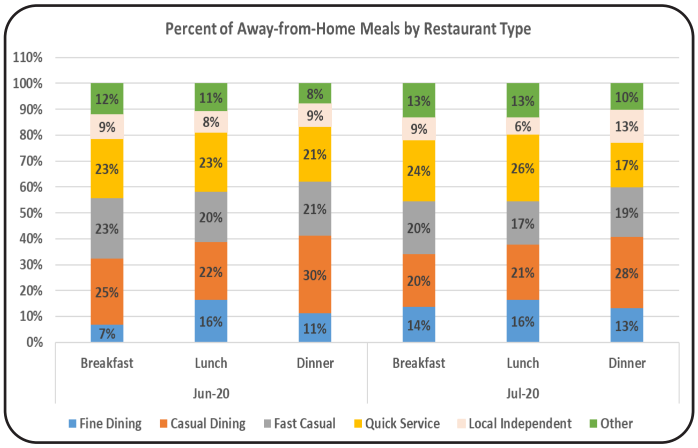


Prior Day Meals: At-Home Protein Source & Restaurant Type

In July, the protein source for at-home meals was predominantly Grocery Stores. The combination of fully in-person, ordered online and picked-up at store, and ordered online and delivered accounted for over 60% of the protein sourcing of at-home 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 leads for dinner meals. Combined, Casual Dining, Fast Casual, and Quick Service comprise over 60% of all meals.





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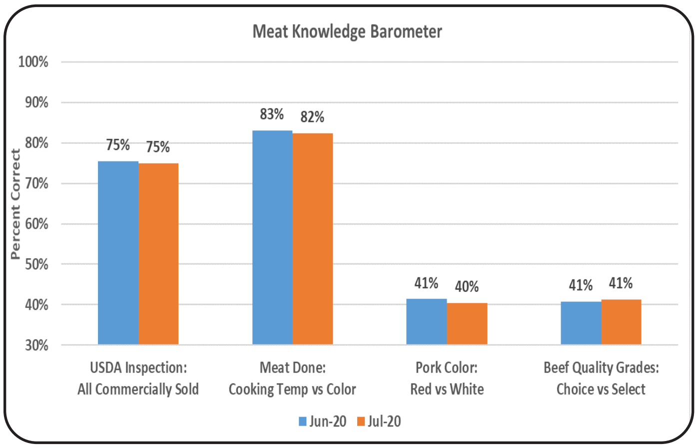
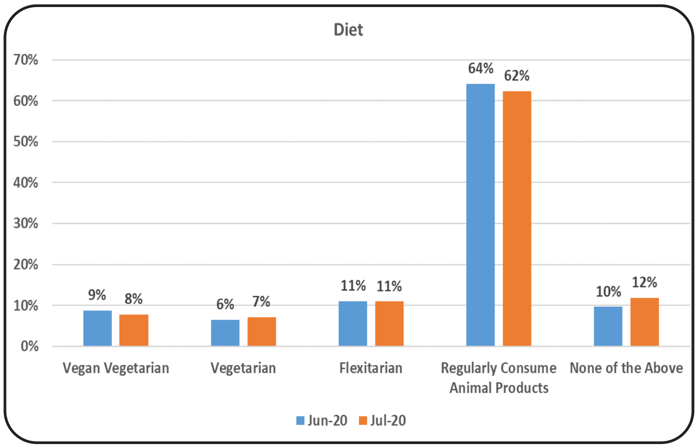
Meat Knowledge & Personal Diet

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." Over one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

In July, 62% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 15% indicate they are either Vegan Vegetarian or Vegetarian. An increase in "None" being selected continues from recent months.





Ad Hoc Questioning

In July an ad hoc question asked respondents what changes they have made due to the coronavirus pandemic. Respondents were randomly allocated ether a "food," "beef," or "pork" framed question to see what differences may apply.

Overall, the most common adjustments are an increase in the volume of product households are keeping on-hand and an increase in cleaning and sanitation of purchased products. Comparing categories, no strong trend is apparent as behavior changes appear similar for food broadly with beef and pork as specific categories.

Changes Made Due to Coronavirus Pandemic	**Food**	**Beef**	**Pork**
Increased purchase of food/beef/pork products that have been handled less	6.54%	4.77%	4.37%
Increased volume of food/beef/pork on-hand	12.71%	7.98%	6.28%
Increased purchase of food/beef/pork products that are locally-sourced	5.72%	4.82%	4.93%
Increased purchase of larger food/beef/pork packages that were handled less before my purchase, yet require more at-home preparation before use	7.17%	5.46%	4.47%
Purchased food/beef/pork items or packages I normally would not buy	9.71%	8.11%	8.44%
Increased cleaning and sanitation of purchased food/beef/pork products and packages	12.07%	8.92%	8.25%

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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