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
Feb-22 WTP ($/lb)	$17.33	$9.13	$7.63	$6.16	$8.92	$9.89	$10.22	$3.44	
Market Share	7%	23%	13%	8%	25%	4%	5%	8%	7%
Mar-22 WTP ($/lb)	$18.91	$9.68	$8.29	$7.06	$9.62	$9.11	$10.01	$3.65	
Market Share	10%	23%	14%	9%	26%	3%	4%	7%	6%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Feb-22 WTP ($/meal)	$28.80	$21.64	$16.65	$20.67	$20.81	$15.58	$19.48	$20.09	
Market Share	15%	22%	5%	11%	17%	5%	12%	8%	5%
Mar-22 WTP ($/meal)	$27.17	$19.76	$16.33	$18.19	$17.58	$12.72	$17.40	$18.97	
Market Share	17%	24%	5%	10%	14%	4%	12%	9%	6%

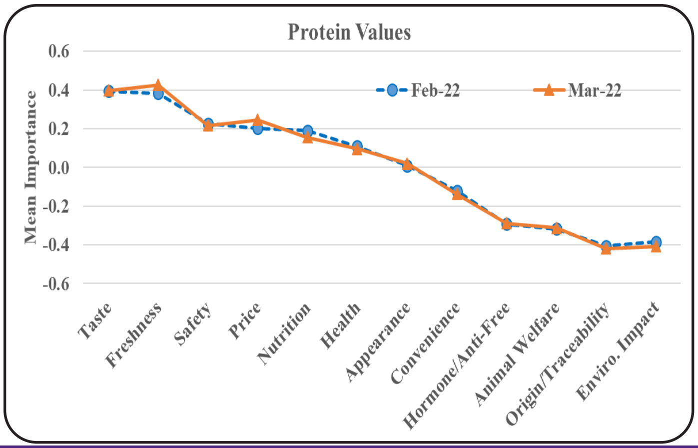
Willingness-to-pay (WTP) increased for 6 evaluated Retail products, including all beef and pork items, in March compared to February. Meanwhile WTP decreased for all 8 evaluated Food Service meals.

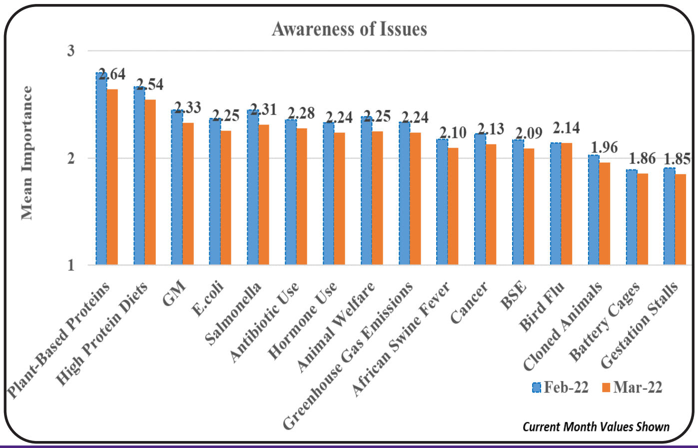
The combined beef and pork projected market shares for March are 32% and 22%, respectively at the grocery store and 40% and 15% at the restaurant.

Protein Values & Issues Awareness

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

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





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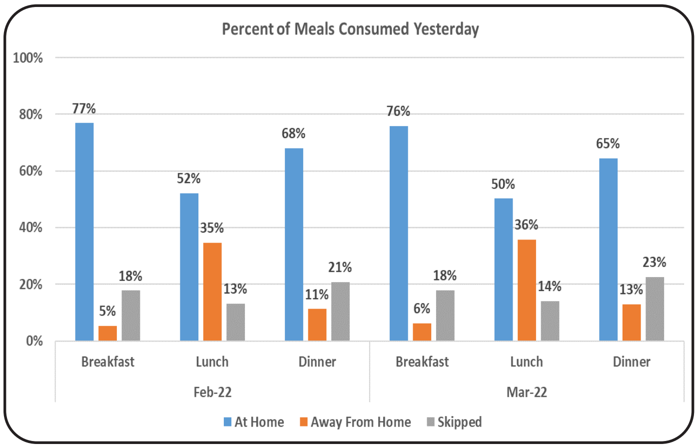
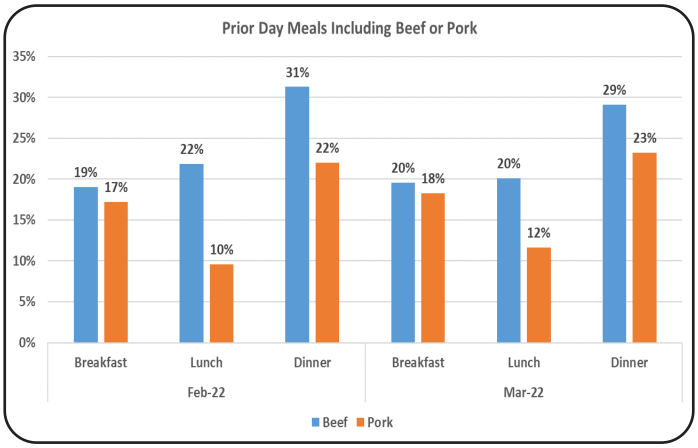
Prior Day Meals: Location & Protein Consumption Frequency

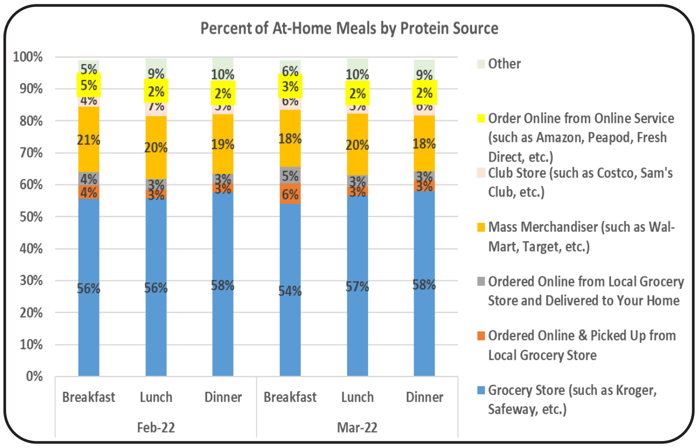
Respondents indicate 76%, 50%, and 65% consumed breakfast, lunch, and dinner at home in March. In March, 20%, 20%, and 29% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 23% of these meals.

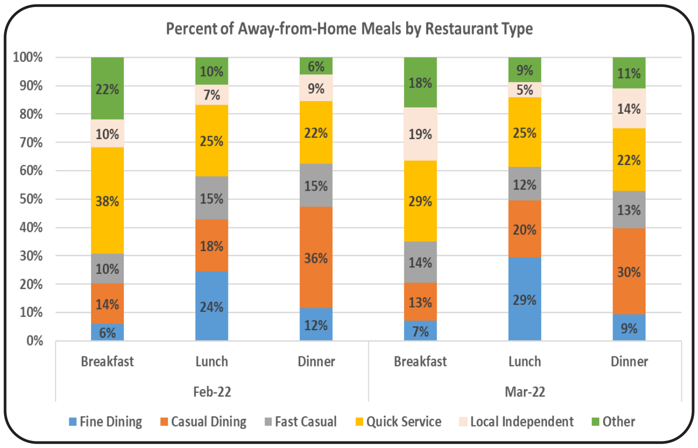




Prior Day Meals: At-Home Protein Source & Restaurant Type

In March, 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, Fine Dining leads for lunch, and Casual Dining leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 57%, 57%, and 66% of breakfast, lunch, and dinner meals in March.





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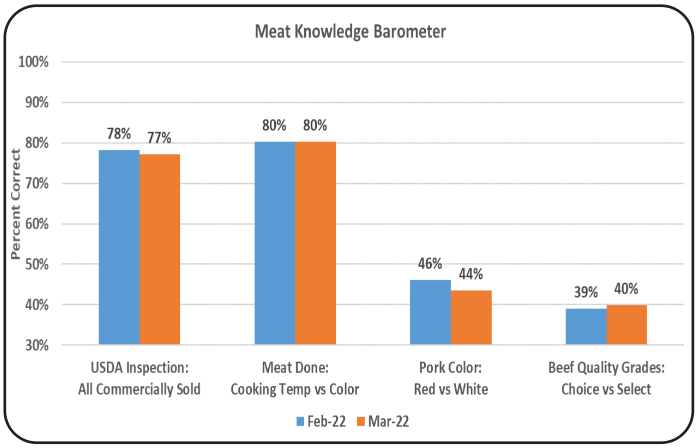
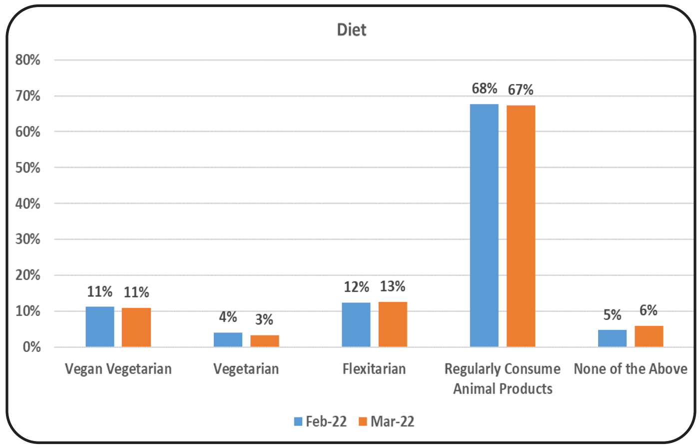
Additional MDM Project details are available at: https://www.agmanager.info/

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 March, 67% of respondents self-declare as regular consumers of products derived from animal products, 13% indicate they are Flexitarian/Semi-Vegetarian, and a combined 14% indicate they are either Vegan Vegetarian or Vegetarian.

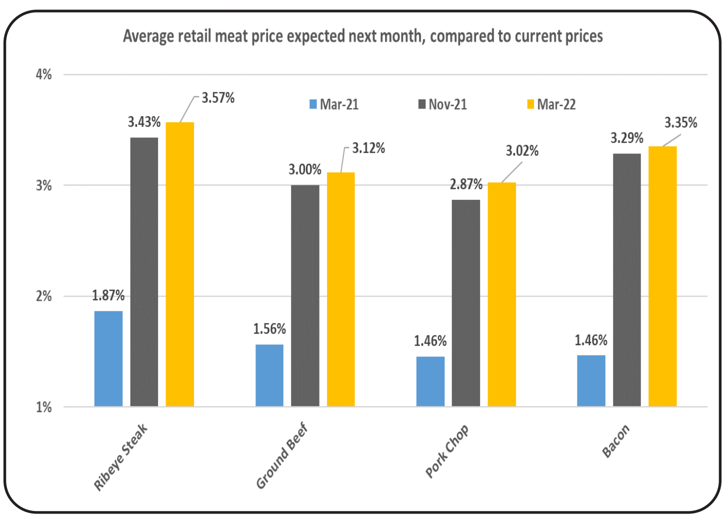


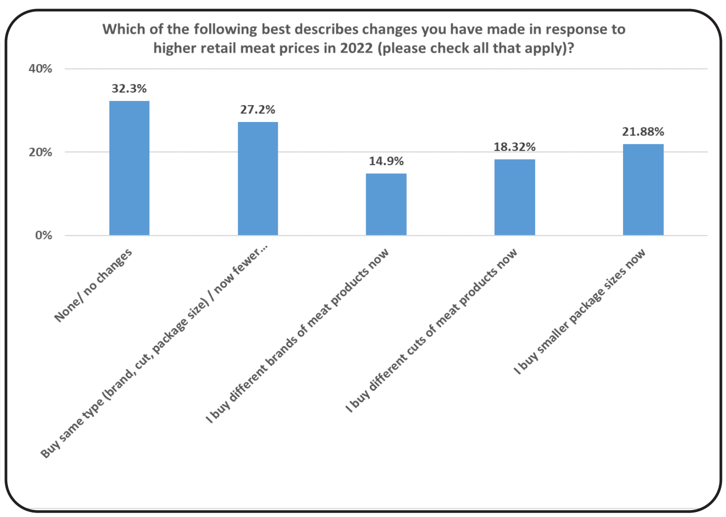


Ad Hoc Questioning

Consumers expect higher retail meat price increases in April. These price expectations are both notably higher than one-year ago and the recent peak in November, perhaps reflecting ongoing inflation discussions.

A new question was asked on how consumers have responded to higher retail meat prices in 2022. The most common response (32%) was no change has been made. Among those indicating changes, the most prevalent noted adjustment was reducing the volume of items purchased while being steadfast in product type (brand, cut, and package size).





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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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