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-23 WTP ($/lb)	$17.09	$8.39	$6.69	$5.68	$8.26	$7.94	$8.58	$2.74	
Market Share	8%	23%	13%	8%	26%	3%	4%	7%	8%
Mar-23 WTP ($/lb)	$16.94	$8.18	$6.98	$5.40	$7.87	$8.82	$9.24	$2.96	
Market Share	7%	24%	14%	7%	26%	3%	4%	7%	7%

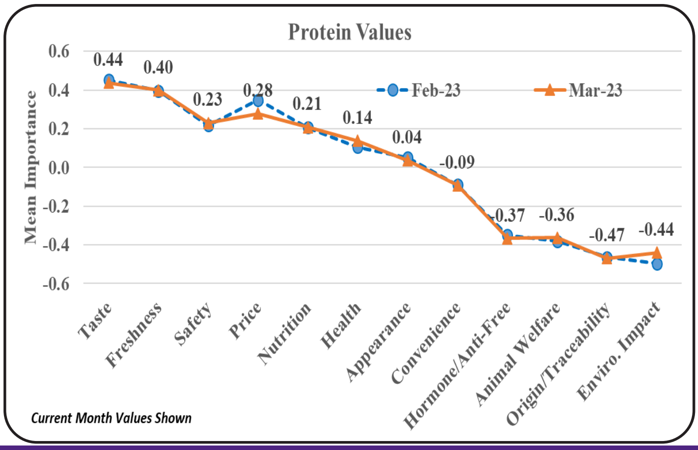
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Feb-23 WTP ($/meal)	$25.50	$18.94	$14.77	$18.10	$17.30	$13.45	$17.22	$18.21	
Market Share	14%	26%	4%	10%	15%	4%	13%	8%	6%
Mar-23 WTP ($/meal)	$27.16	$20.68	$16.47	$19.60	$19.18	$13.47	$18.12	$19.55	
Market Share	14%	24%	5%	11%	16%	4%	12%	8%	5%

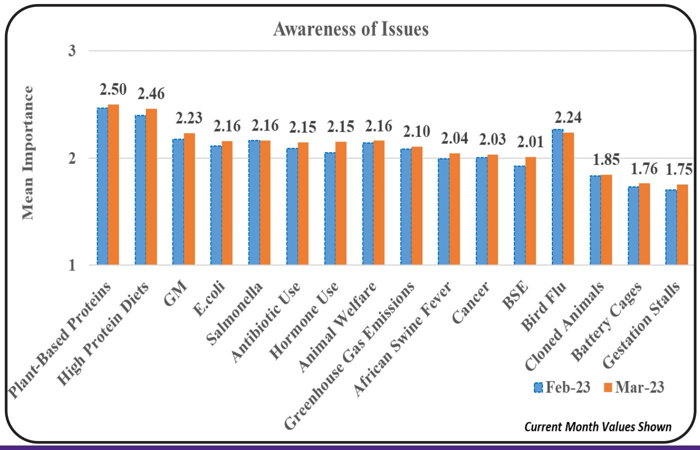
Willingness-to-pay (WTP) decreased for four (both beef, bacon, and chicken breast) evaluated Retail products, in March compared to February. WTP increased for all evaluated Food Service meals. Demand for all examined retail products was lower in March of 2023 than in March of 2022 while food service demand was higher for most meals.

The combined beef and pork projected market shares for March are 31% and 21%, respectively at the grocery store and 39% and 16% at the restaurant.

Protein Values & Issues Awareness

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





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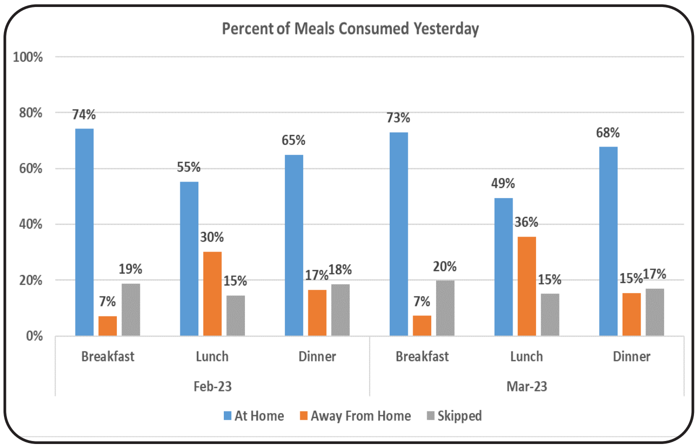
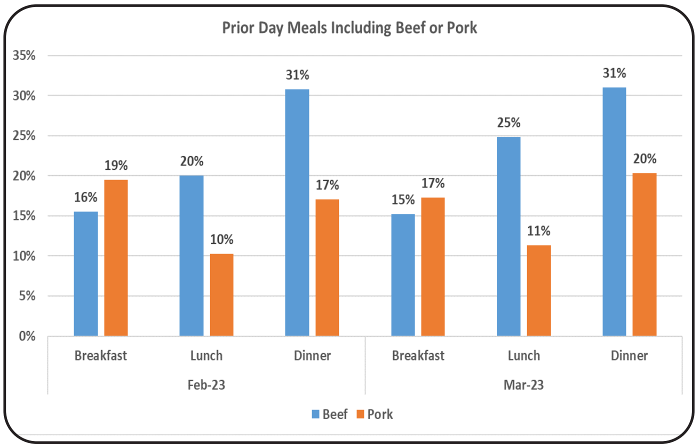
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 68% consumed breakfast, lunch, and dinner at home in March. In March, 15%, 25%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 11%, and 20% of these meals.

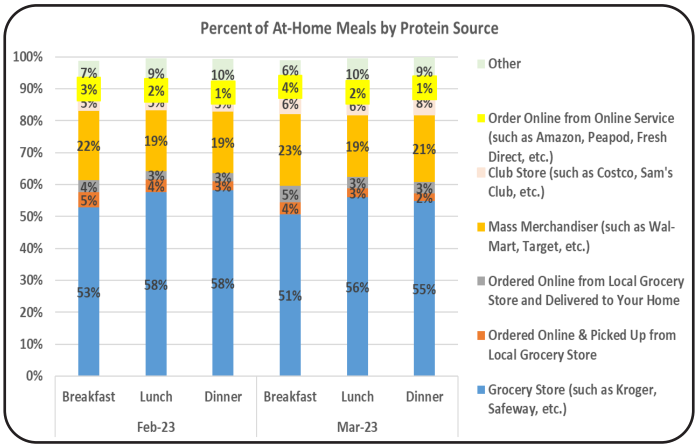


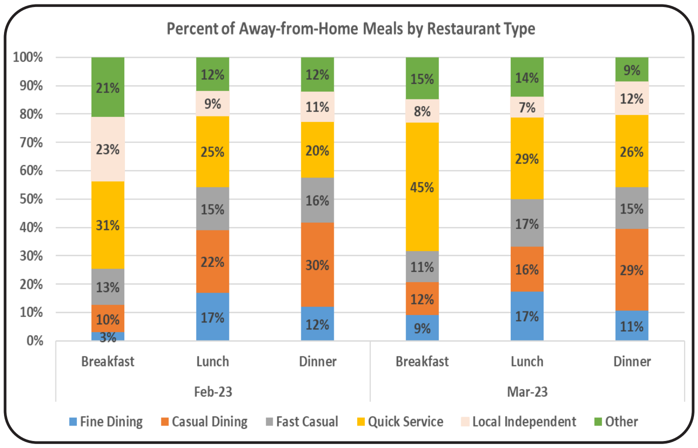


Prior Day Meals: At-Home Protein Source & Restaurant Type

In March, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 29%, 26%, and 29% 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 68%, 61%, and 69% of breakfast, lunch, and dinner meals in March.





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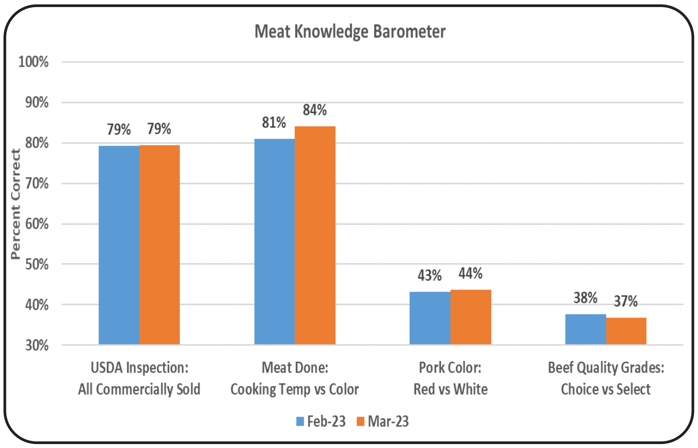
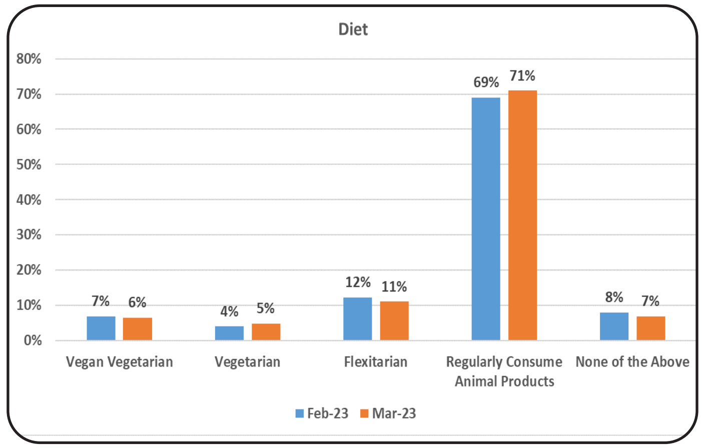
Additional MDM Project details are available at: https://www.agmanager.info/

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, 71% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.

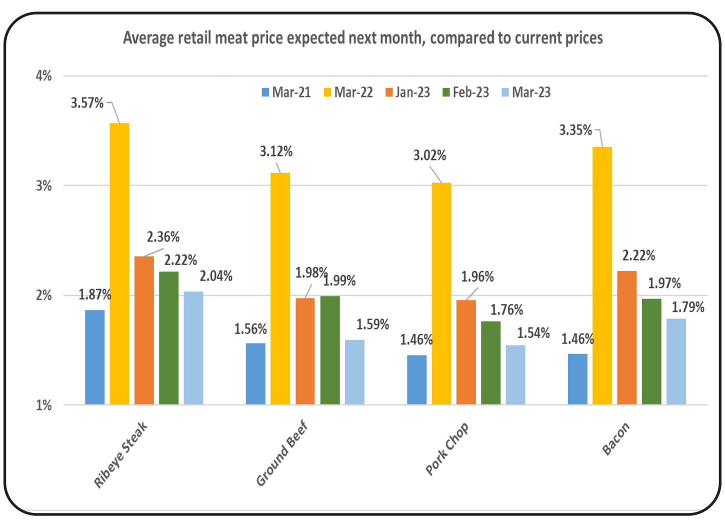


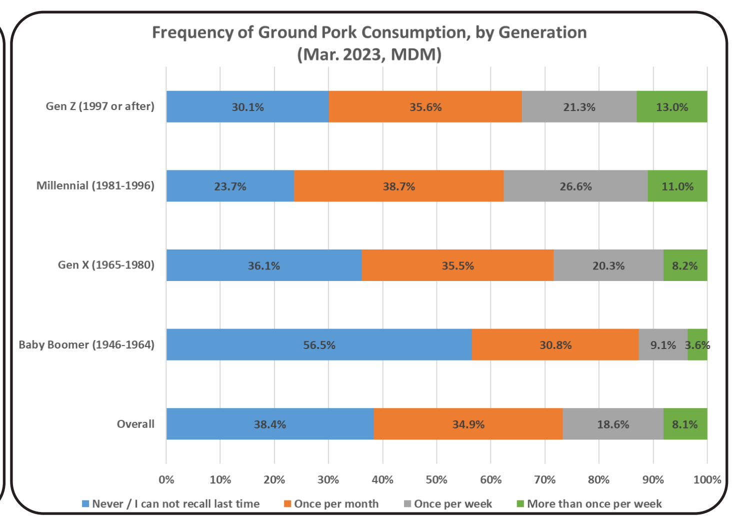


Ad Hoc Questioning

Resident expectations regarding future retail meat prices continue to moderate. In April, residents expect increases of 2% (or less) in retail ground beef, pork chop, and bacon prices with expectations approaching those from March of 2021.

Given elevated interest in ground pork, recalled frequency of consumption was assessed. What stands out is how younger generations lead in consumption frequency as more than one-in-three Millennial (1981-1996) and Gen Z (1997 or after) respondents indicate having ground pork at least once per week.





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

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.

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