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.

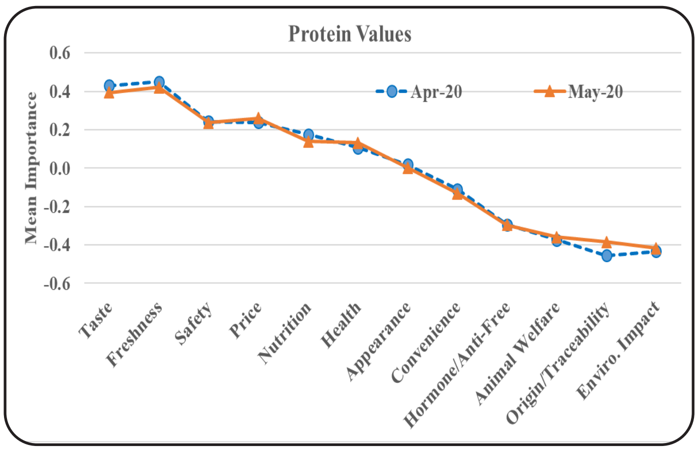
Willingness to Pay & Projected Market Share

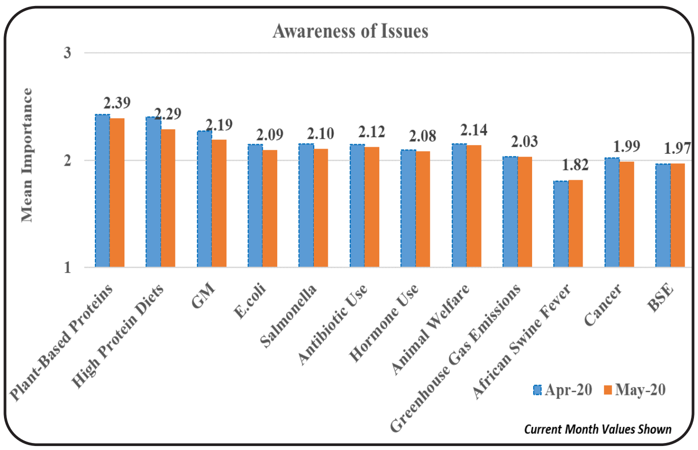
RETAIL		Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Apr-20	*WTP ($/lb)*	$ 16.44	$ 7.72	$ 6.33	$ 5.06	$ 7.58	$ 8.23	$ 8.98	$ 2.56	
	Market Share	**7.1%**	**23.4%**	**12.9%**	**7.4%**	**26.3%**	**2.6%**	**4.5%**	**7.4%**	**8.5%**
May-20	*WTP ($/lb)*	$ 15.45	$ 6.94	$ 5.87	$ 4.41	$ 6.90	$ 7.57	$ 8.82	$ 1.74	
	Market Share	**6.3%**	**22.2%**	**13.6%**	**7.3%**	**25.8%**	**2.5%**	**5.2%**	**6.9%**	**10.3%**
FOOD SERVICE		**Ribeye Steak**	**Beef Hamburger**	**Pork Chop**	**Baby Back Ribs**	**Chicken Breast**	**Plant-Based Patty**	**Shrimp**	**Salmon**	**Something Else**
Apr-20	*WTP ($/lb)*	$ 24.65	$ 17.58	$13.47	$ 17.01	$ 16.17	$ 11.57	$ 16.51	$17.12	
	Market Share	**14.3%**	**22.3%**	**4.2%**	**10.6%**	**14.3%**	**4.3%**	**13.9%**	**8.2%**	**8.0%**
May-20	*WTP ($/lb)*	$ 25.30	$ 19.09	$15.34	$ 18.49	$ 17.57	$ 12.76	$ 17.06	$17.97	
	Market Share	**13.2%**	**24.0%**	**4.9%**	**11.4%**	**15.2%**	**4.4%**	**12.6%**	**7.9%**	**6.6%**

Willingness-to-pay (WTP) for all items in Retail decreased in May compared to April while all items in Food Service increased. Ground Beef, Pork Chops, and Bacon had the largest relative shifts in demand from Retail to Food Service. The combined beef and pork projected market shares for May are 29% and 21%, respectively at the grocery store and 37% and 16% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Price, Health, and Origin/Traceability increased in importance while Taste and Nutrition decreased from last month. Plant-based Proteins, High Protein Diets, and Genetically Modified Foods remained the three topics heard or read about the most.





Prior Day Meal Location & Protein Consumption Frequency

Respondents indicate 78%, 62%, and 73% consumed breakfast, lunch, and dinner at home (vs. away from home) in May with lunch and dinner meals decreasing from April in at home prevalence. In May, 15%, 20%, and 31% had beef in their prior day breakfast, lunch, and dinner. Pork was included in 17%, 14%, and 19% of these meals.

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Meat Demand Monitor
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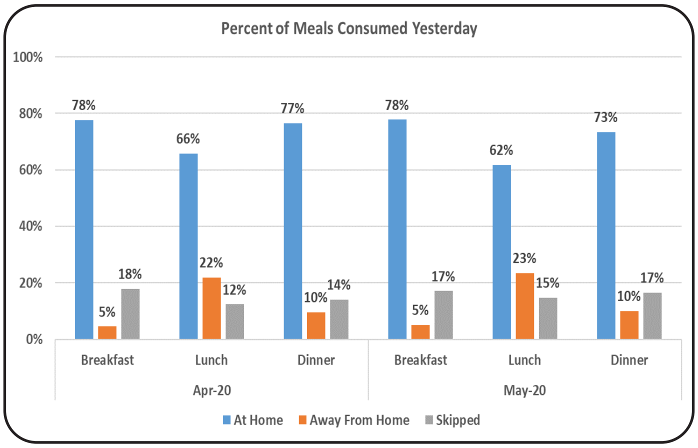
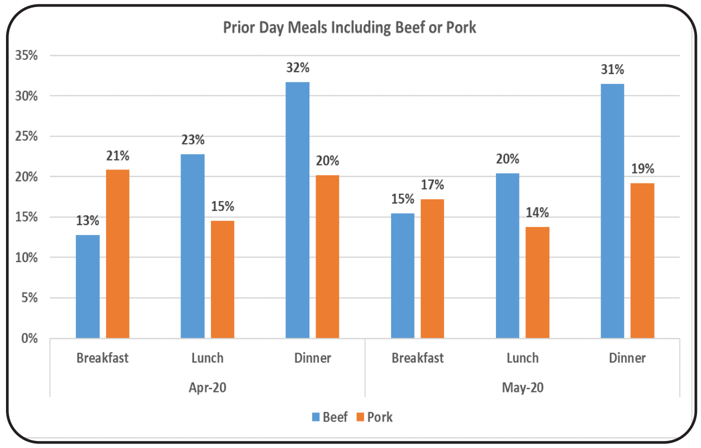
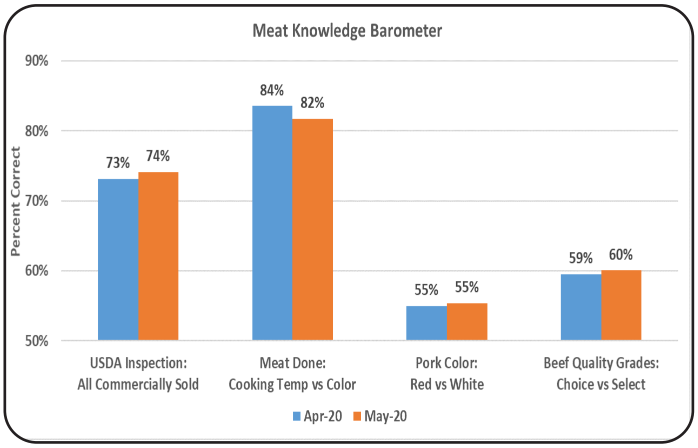
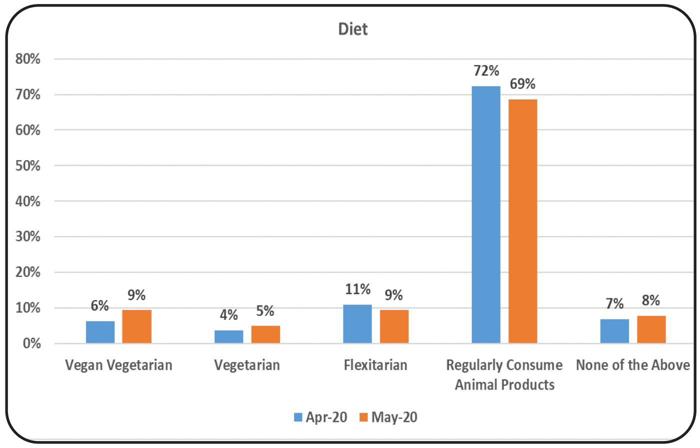




Meat Knowledge & Personal Diet

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

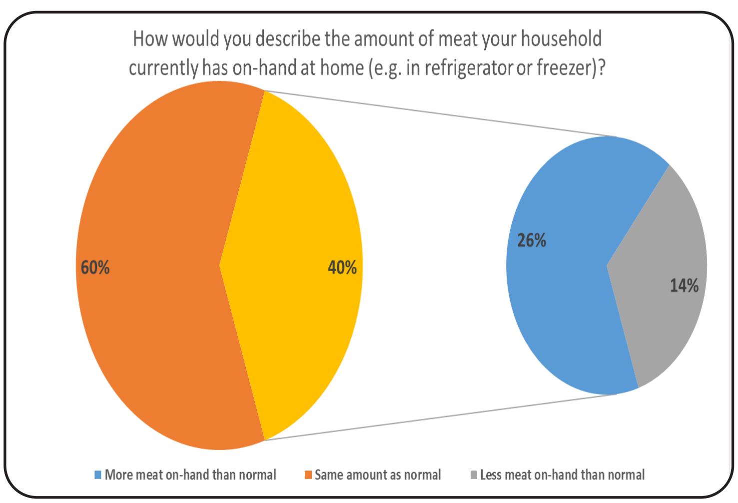




In May, 69% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 14% indicate they are either Vegan Vegetarian or Vegetarian.

Ad Hoc Questioning

In May, a minority of 14% indicate having less meat on hand than normal. This and related COVID-19 impacts were further examined in a special report published on May 12th: *https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data/meat-demand-monitor-coronavirus*



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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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