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-21	WTP ($/lb)	$17.27	$8.11	$6.33	$5.28	$7.31	$7.42	$8.56	$1.72	
	Market Share	10%	24%	13%	8%	22%	3%	5%	6%	9%
May-21	WTP ($/lb)	$17.25	$8.36	$6.83	$5.70	$8.19	$9.37	$9.46	$2.70	
	Market Share	8%	22%	13%	8%	24%	4%	5%	7%	8%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Apr-21	WTP ($/meal)	$23.25	$18.12	$13.68	$17.27	$17.01	$12.24	$16.76	$16.37	
	Market Share	11%	22%	5%	11%	16%	5%	14%	8%	8%
May-21	WTP ($/meal)	$25.86	$20.78	$15.39	$19.04	$18.98	$14.41	$19.11	$19.58	
	Market Share	12%	23%	5%	10%	15%	6%	14%	9%	6%

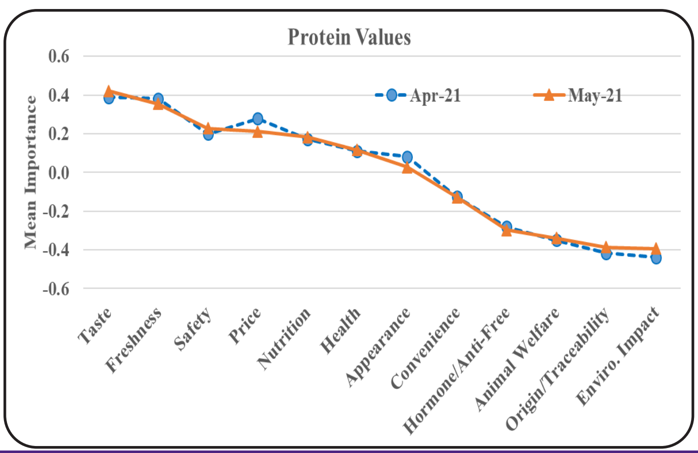
Willingness-to-pay (WTP) increased for seven evaluated Retail products in May compared to April. WTP increased for all eight evaluated Food Service meals.

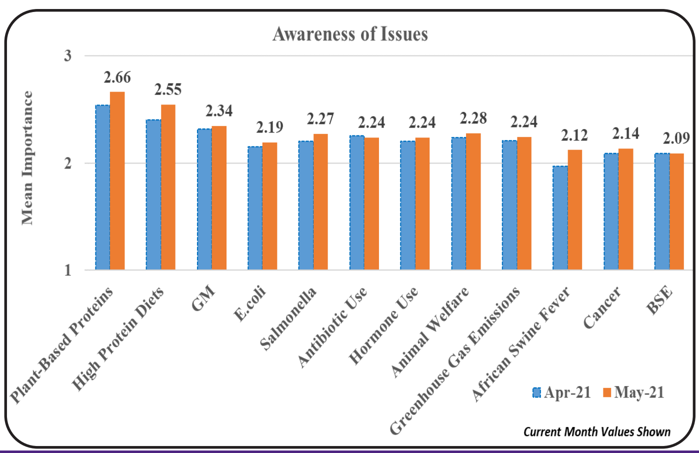
The combined beef and pork projected market shares for May are 30% and 21%, respectively at the grocery store and 35% and 15% at the restaurant.

Protein Values & Issues Awareness

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

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





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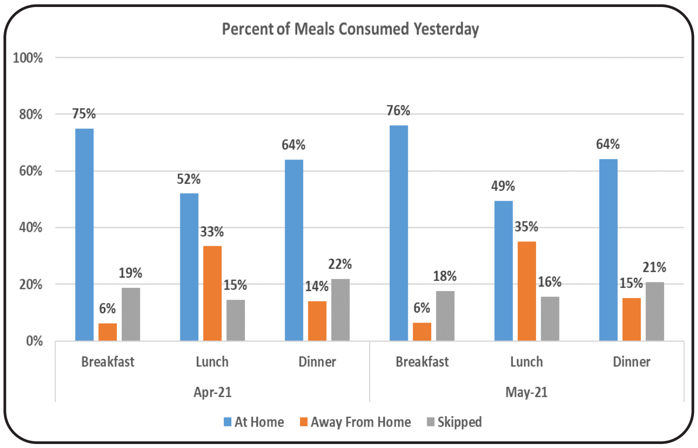
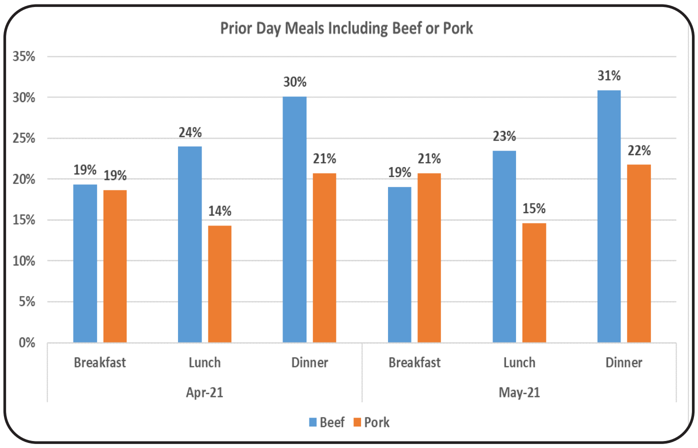
Prior Day Meals: Location & Protein Consumption Frequency

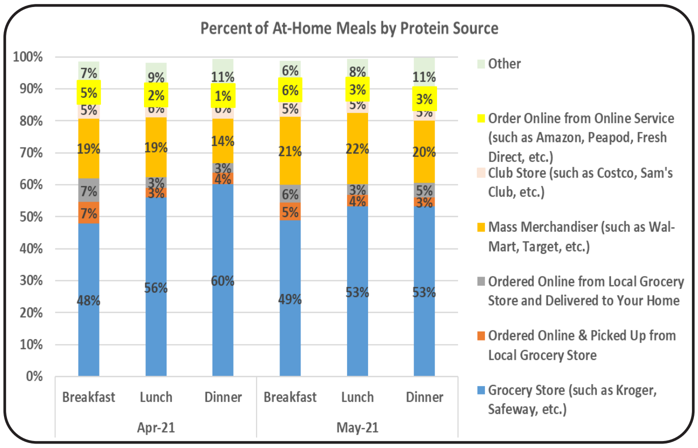
Respondents indicate 76%, 49%, and 64% consumed breakfast, lunch, and dinner at home in May. In May, 19%, 23%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 21%, 15%, and 22% of these meals.

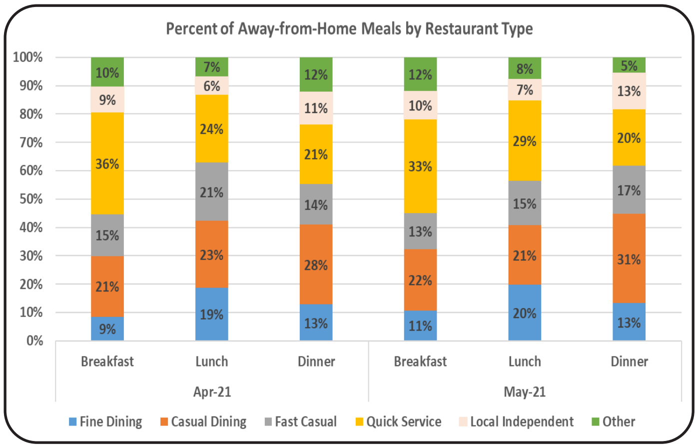




Prior Day Meals: At-Home Protein Source & Restaurant Type

In May, 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 and lunch while Casual Dining leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 68%, 65%, and 68% of breakfast, lunch, and dinner meals in May.





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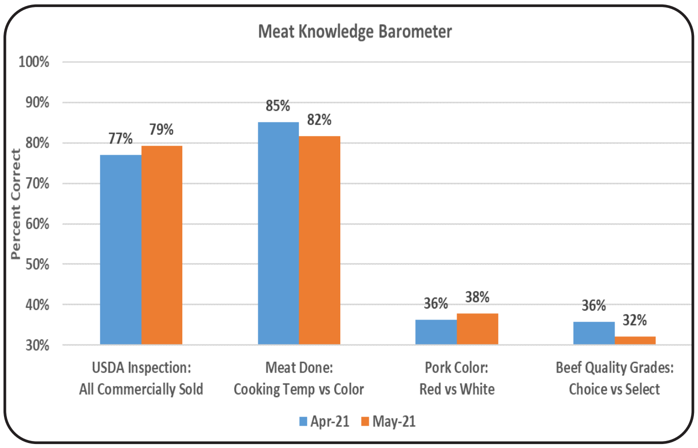
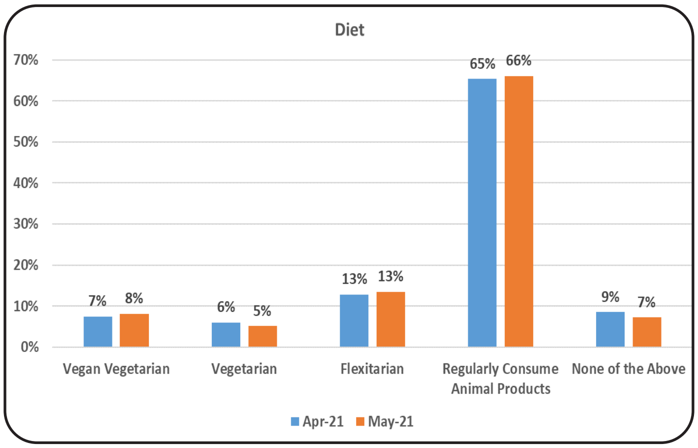
Additional MDM Project details are available at: https://www.agmanager.info/

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.

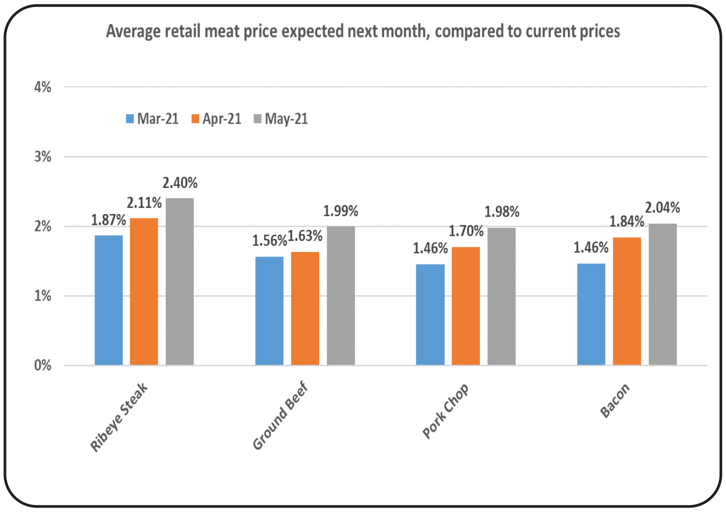
In May, 66% of respondents self-declare as regular consumers of products derived from animal products, 13% indicate they are Flexitarian/Semi-Vegetarian, and a combined 13% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

The May survey included a question asked since March of 2021 to assess retail meat price expectations. Respondents were first asked directionally if they expected higher, the same, or lower prices in the next month on four different beef and pork items. Then follow-up questions honed in on magnitudes of expected price changes. Since March, each month consumers are indicating they expect increasing retail prices for ribeye steak, ground beef, pork chop, and bacon products. This aligns with broader discussions around food price inflation.



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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