Kansas State
Department of
Agricultural Economics
Vol. 3, Issue 5 ● May 2022

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-22 WTP ($/lb)	$18.61	$9.34	$7.98	$6.71	$8.99	$9.11	$9.75	$3.63	
Market Share	9%	24%	14%	8%	25%	3%	4%	7%	6%
May-22 WTP ($/lb)	$17.42	$8.78	$7.34	$5.56	$8.36	$8.96	$9.61	$3.10	
Market Share	8%	25%	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
Apr-22 WTP ($/meal)	$28.91	$22.07	$17.72	$19.75	$19.76	$14.08	$20.10	$20.01	
Market Share	16%	24%	6%	10%	14%	4%	14%	8%	5%
May-22 WTP ($/meal)	$28.30	$21.00	$16.52	$19.52	$19.15	$13.42	$18.96	$19.78	
Market Share	16%	24%	5%	10%	15%	4%	13%	8%	5%

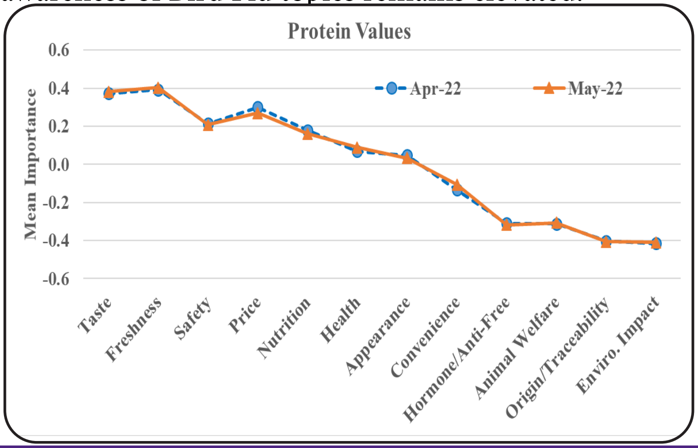
Willingness-to-pay (WTP) decreased for all evaluated Retail products in May compared to April. Similarly, WTP decreased for all 8 evaluated Food Service meals. Combined this confirms weaker consumer demand consistent with increased general discussion around consumers being more conservative in their spending.

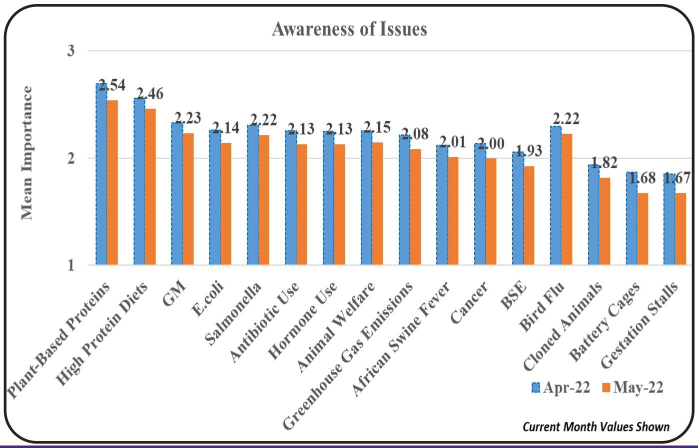
The combined beef and pork projected market shares for May are 33% and 21%, respectively at the grocery store and 41% and 15% at the restaurant.

Protein Values & Issues Awareness

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

Plant-based Proteins and High Protein Diets remain topics heard or read most about. Not surprisingly, awareness of Bird Flu topics remains elevated.

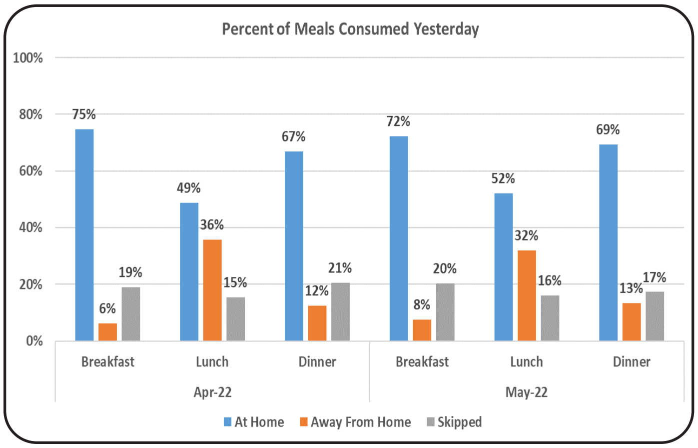


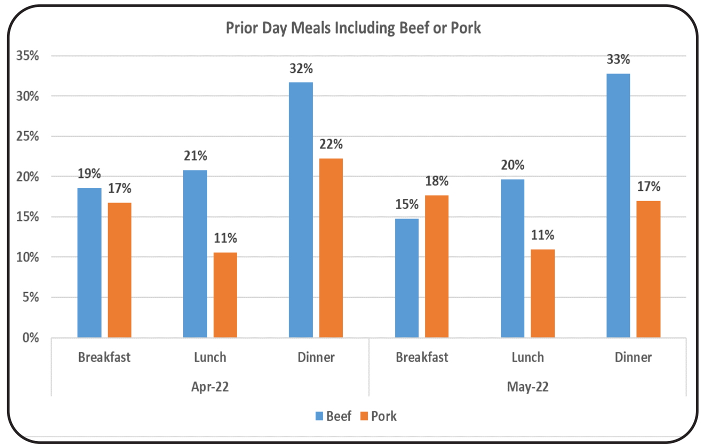


Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

Prior Day Meals: Location & Protein Consumption Frequency

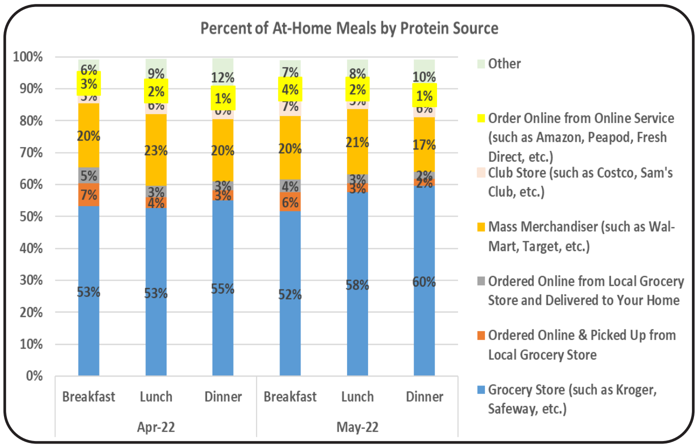
Respondents indicate 72%, 52%, and 69% consumed breakfast, lunch, and dinner at home in May. In May, 15%, 20%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 11%, and 17% of these meals.

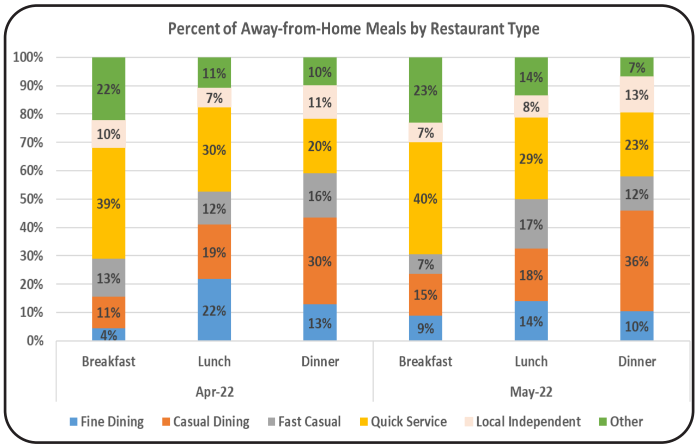




Prior Day Meals: At-Home Protein Source & Restaurant Type

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 61%, 65%, and 70% of breakfast, lunch, and dinner meals in May.





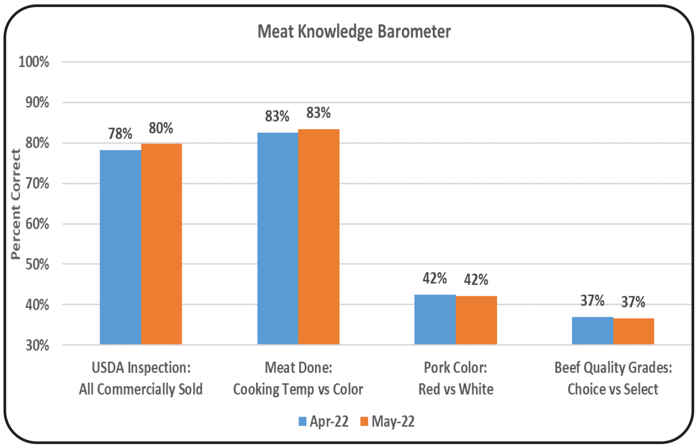
AgManager .info

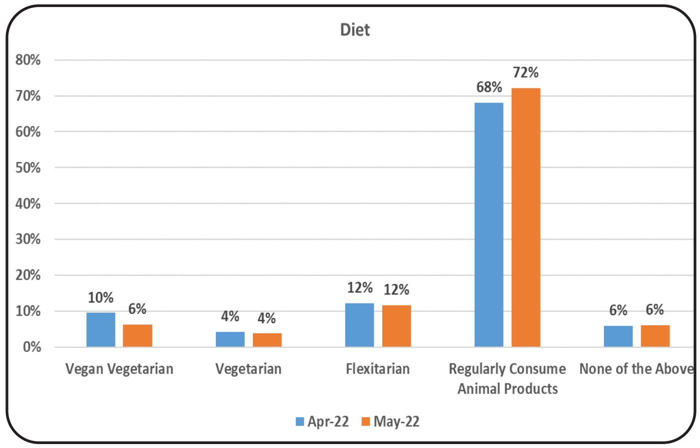
Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu
Additional MDM Project details are available at: https://www.agmanager.info/

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 May, 72% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 10% indicate they are either Vegan Vegetarian or Vegetarian.

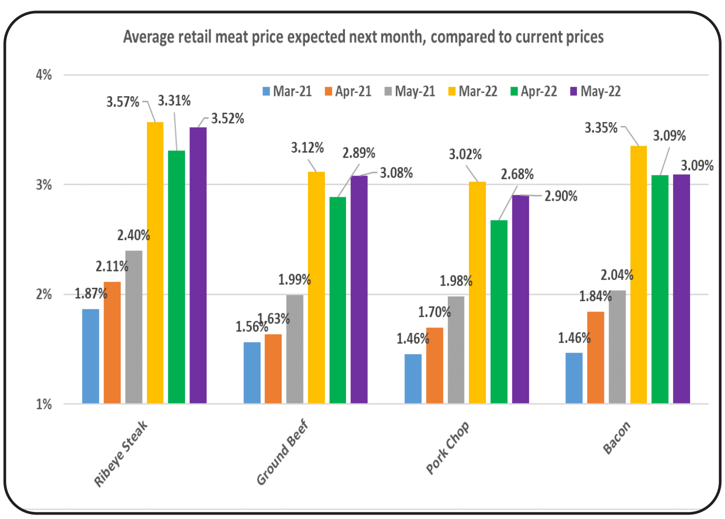


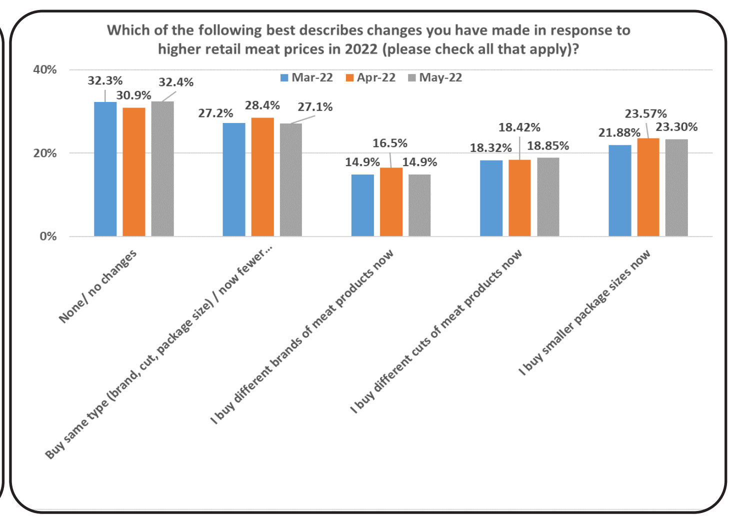


Ad Hoc Questioning

Consumers continue to expect higher retail meat prices next month and these price expectations remain well above one-year ago expectations consistent with ongoing inflation discussions.

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





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.

Funded in part by the Beef Checkoff.

Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu