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
Oct-20 WTP ($/lb)	$16.52	$7.59	$5.81	$4.27	$7.11	$7.51	$7.72	$1.42	
Market Share	9%	24%	13%	7%	24%	3%	4%	6%	10%
Nov-20 WTP ($/lb)	$15.99	$7.29	$5.84	$4.47	$7.24	$7.40	$8.39	$1.27	
Market Share	8%	22%	13%	8%	25%	3%	5%	6%	10%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Oct-20 WTP ($/meal)	$22.92	$16.71	$12.63	$15.83	$15.08	$11.83	$16.04	$16.61	
Market Share	12%	21%	4%	10%	14%	5%	15%	9%	9%
Nov-20 WTP ($/meal)	$24.01	$17.32	$12.64	$16.45	$15.81	$12.05	$15.96	$15.68	
Market Share	14%	23%	4%	10%	15%	5%	14%	7%	9%

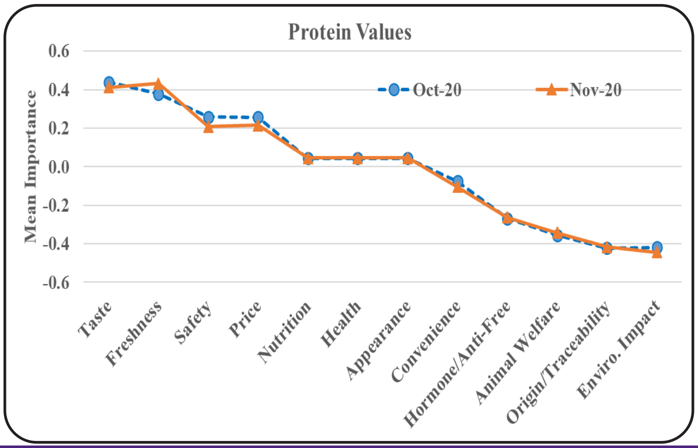
Willingness-to-pay (WTP) increased for four evaluated products in Retail including Pork Chops and Bacon in November compared to October. WTP increased for six evaluated Food Service meals including all four meals with beef and pork entrees.

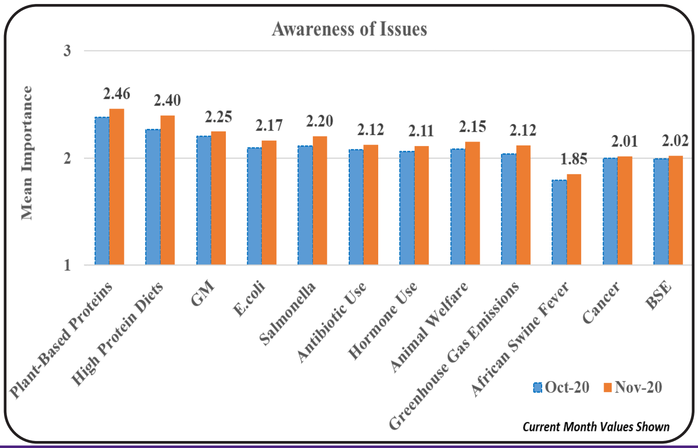
The combined beef and pork projected market shares for November are 30% and 21%, respectively at the grocery store and 37% and 14% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Freshness increased most in importance while Safety 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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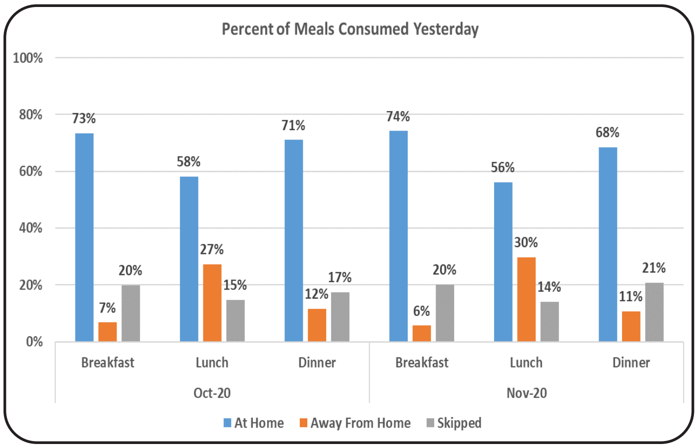
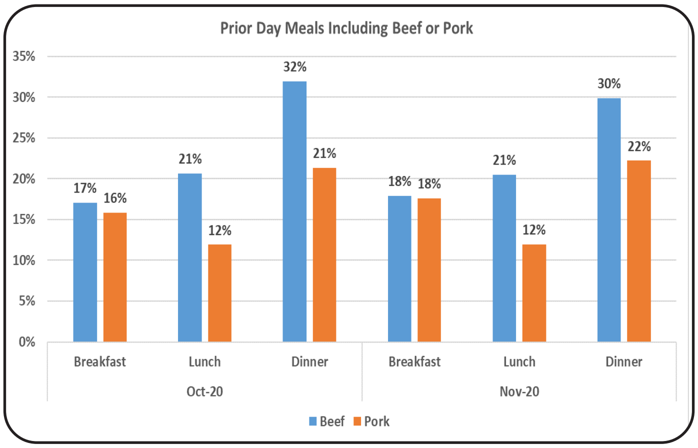
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 56%, and 68% consumed breakfast, lunch, and dinner at home in November.

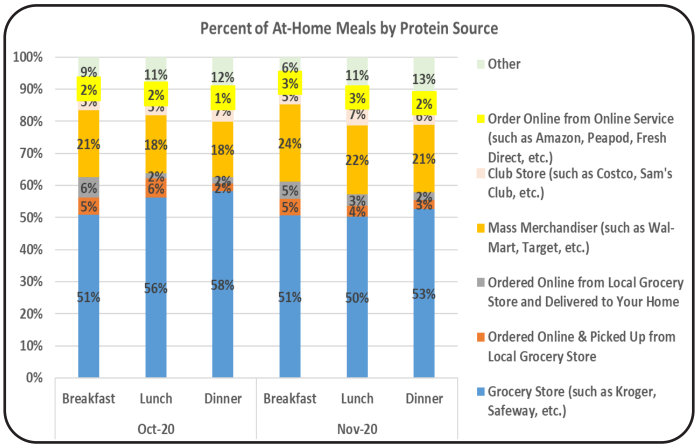
In November, 18%, 21%, and 30% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 22% of these meals.

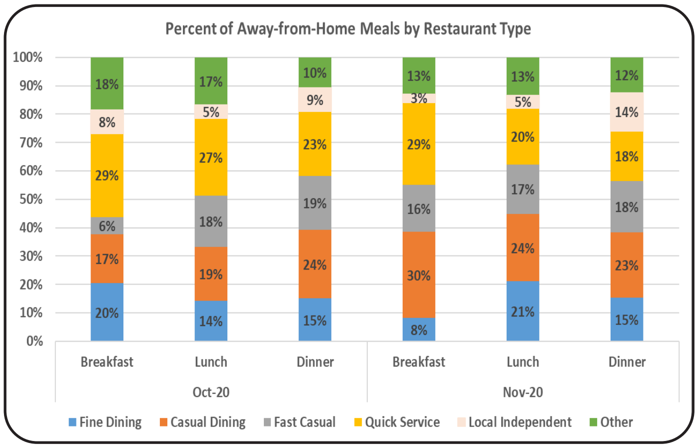




Prior Day Meals: At-Home Protein Source & Restaurant Type

In November, 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 while Casual Dining is more prevalent for both lunch and dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 76%, 61%, and 59% of breakfast, lunch, and dinner meals.





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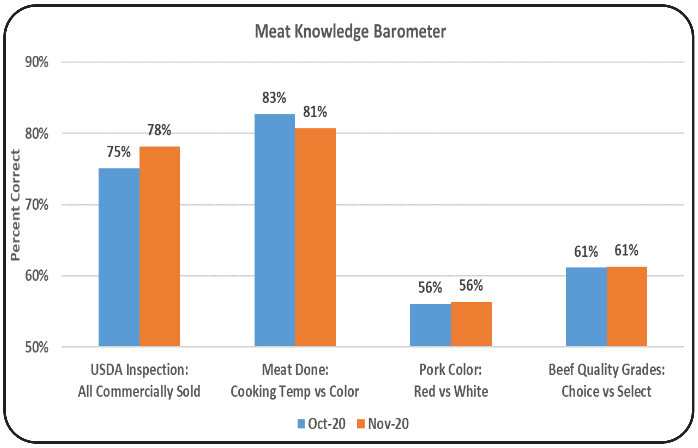
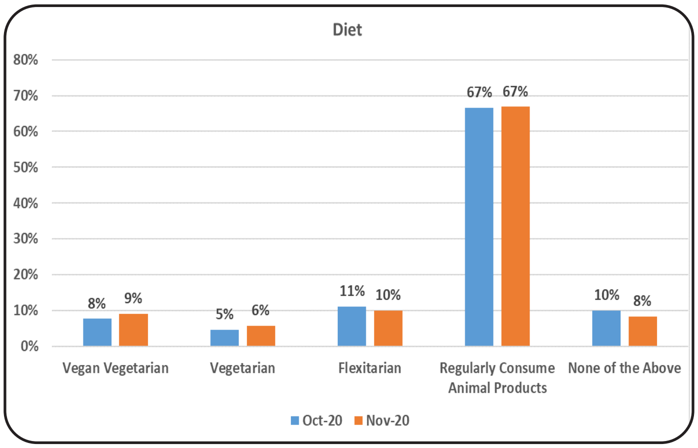
Additional MDM Project details are available at: https://www.agmanager.info/

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

In November, 67% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 15% indicate they are either Vegan Vegetarian or Vegetarian.

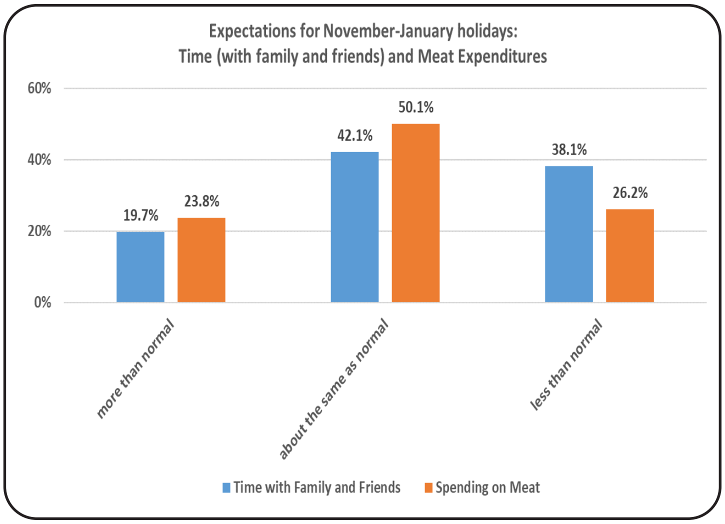




Ad Hoc Questioning

Given rising coronavirus case counts and reated pandemic concerns overlapping with holidays during the November-January period, two questions about holiday plans were added in November. The intent here is to gain insight on expectations regarding time spent with family and frends as well as the amount spent on meat during holiday celebrations to enhance knowledge around holiday meat demand.

Considering time with family and friends, 20%, 42%, and 38% plan to spend more, the same, and less than normal, respectively during the holidays. Meanwhile, 24%, 50%, and 26% expect to spend more, the same, and less on meat during these celebrations. Observing a larger reduction, compared to normal, regarding time with others compared to meat spending may reflect an intent to "upgrade" the protein included in this year's holiday meals.



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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