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-22 WTP ($/lb)	$17.61	$8.99	$7.59	$6.05	$8.82	$9.17	$9.46	$3.53	
Market Share	8%	23%	14%	8%	26%	3%	4%	8%	7%
Nov-22 WTP ($/lb)	$17.33	$8.39	$6.98	$5.73	$8.02	$8.23	$8.88	$2.93	
Market Share	8%	24%	14%	8%	25%	2%	4%	7%	7%

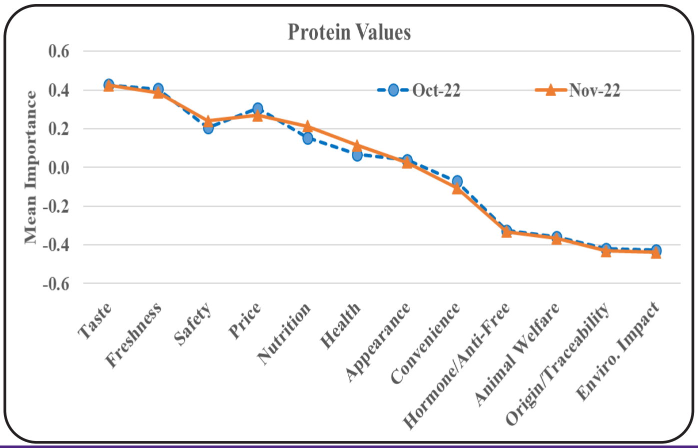
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Oct-22 WTP ($/meal)	$25.42	$19.09	$14.13	$17.62	$17.10	$12.10	$17.88	$17.22	
Market Share	14%	23%	5%	10%	14%	5%	15%	8%	7%
Nov-22 WTP ($/meal)	$27.14	$20.25	$16.70	$18.78	$18.80	$13.95	$19.01	$19.62	
Market Share	15%	23%	5%	10%	15%	4%	14%	9%	5%

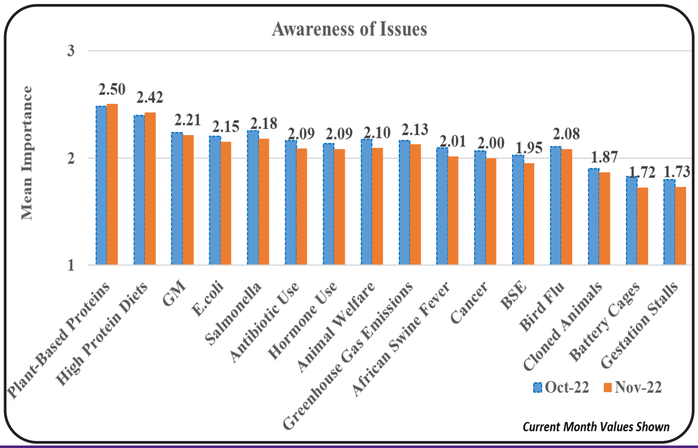
Willingness-to-pay (WTP) decreased for all evaluated Retail products in November compared to October. Demand for all examined retail products was lower in November of 2022 than in November of 2021. Conversely, WTP increased for all evaluated Food Service meals with demand for the four examined beef and pork meals being above October 2022 but below November 2021.

The combined beef and pork projected market shares for November are 32% and 21%, respectively at the grocery store and 38% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. The importance of Safety increased most since October with Price declining in importance from the peak level set in October. Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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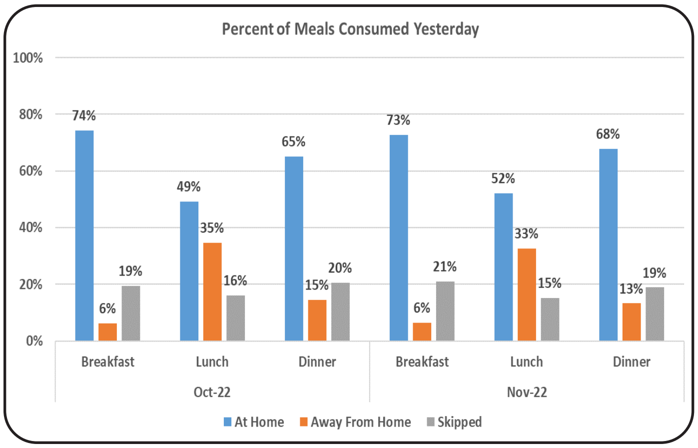
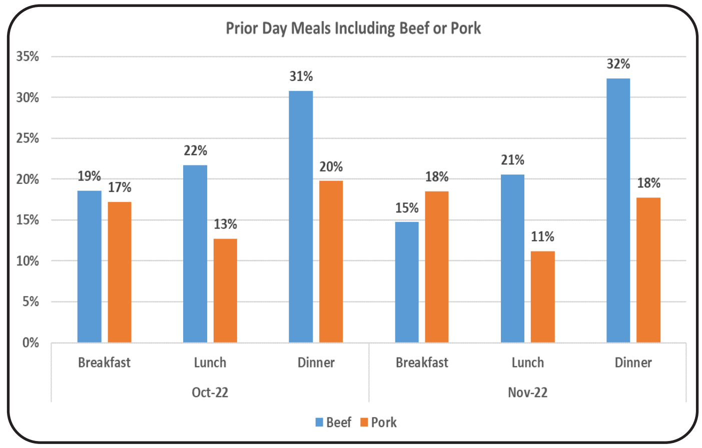
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 52%, and 68% consumed breakfast, lunch, and dinner at home in Novemer. Lunch and Dinner meals were consumed more frequently at home than in October. In November, 15%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 11%, and 18% of these meals.

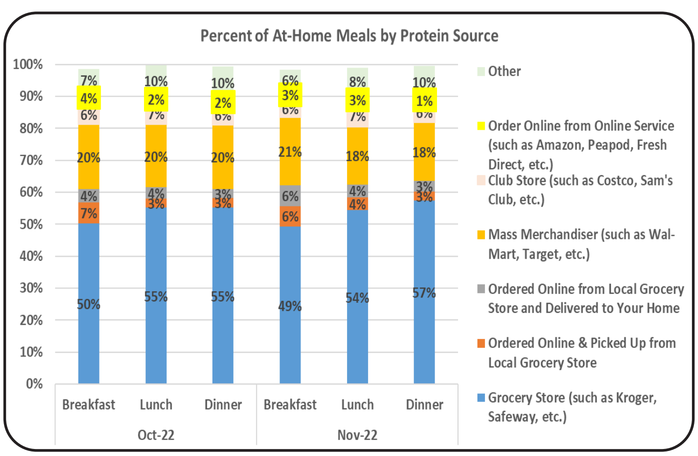


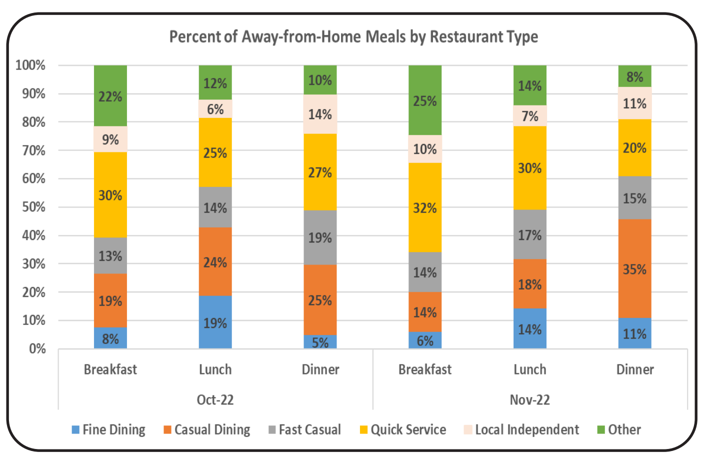


Prior Day Meals: At-Home Protein Source & Restaurant Type

In November, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 27%, 25%, and 25% 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 60%, 65%, and 70% of breakfast, lunch, and dinner meals in November.

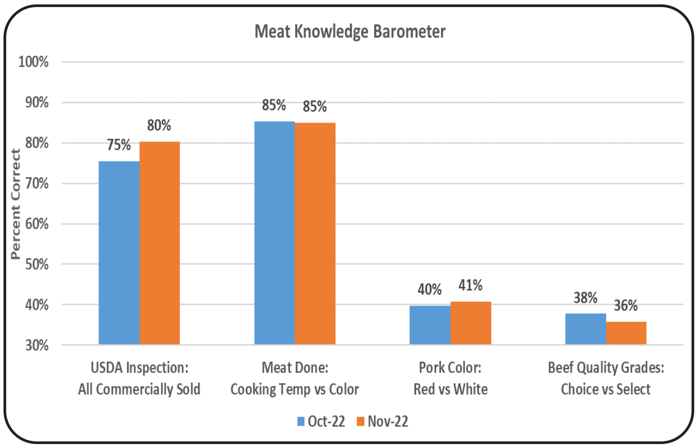


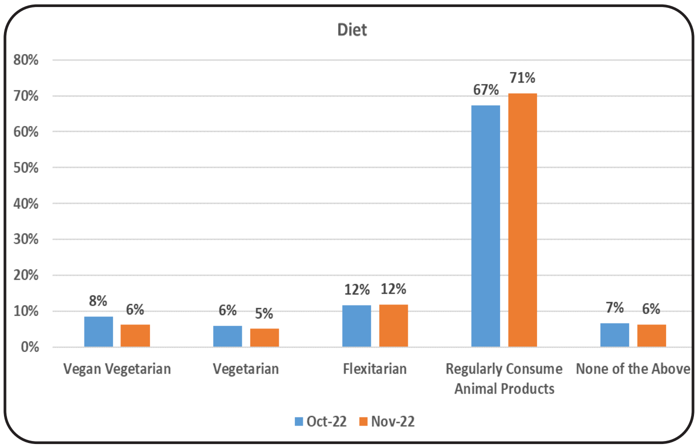


Meat Knowledge & Personal Diet

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.

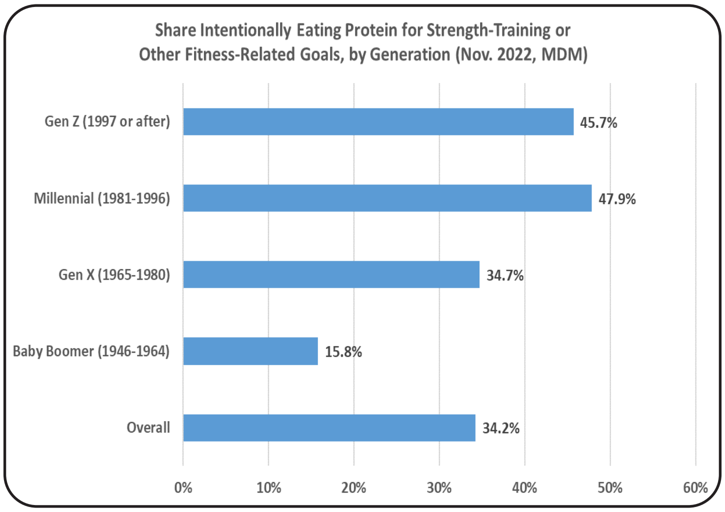
In November, 71% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.

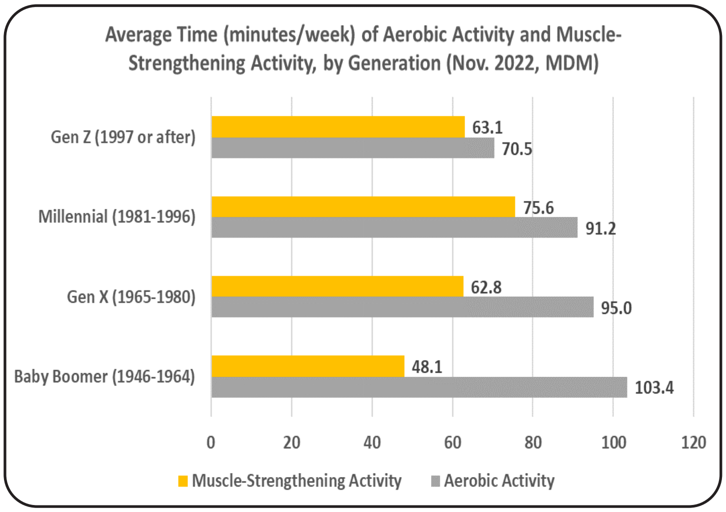




Ad Hoc Questioning

This month a Yes/No question was added asking "Do you intentionally eat protein to aid in meeting strength-training or other fitness-related goals?" Overall 34% respondend affirmatively indicating their protein purchasing is in part related to personal health goals. Going further, this area of support for protein consumption is strongest for younger generations (Gen Z and Millennials) and weaker for older generations (Baby Boomers) relative to the Gen X cohort. As shown in the second figure below, this reflects younger generations reporting more time spent each week in muscle-strengthening activity while older generations spend more time in aerobic (brisk-walking, running, or jogging) activity.





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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