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-23 WTP ($/lb)	$17.76	$9.07	$7.75	$5.73	$8.76	$8.21	$9.22	$3.49	
Market Share	8%	24%	14%	7%	26%	2%	4%	8%	7%
Nov-23 WTP ($/lb)	$16.91	$8.54	$6.92	$5.48	$8.27	$8.64	$9.37	$3.07	
Market Share	7%	25%	13%	7%	27%	2%	4%	7%	7%

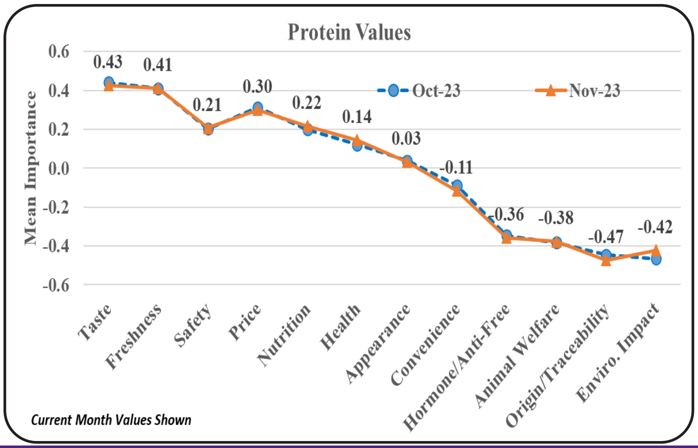
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Oct-23 WTP ($/meal)	$26.11	$20.49	$16.32	$18.39	$17.83	$12.71	$18.06	$18.88	
Market Share	13%	28%	5%	10%	14%	4%	13%	8%	6%
Nov-23 WTP ($/meal)	$27.21	$20.66	$15.79	$18.53	$18.38	$12.96	$18.22	$19.02	
Market Share	15%	26%	4%	9%	15%	4%	13%	8%	5%

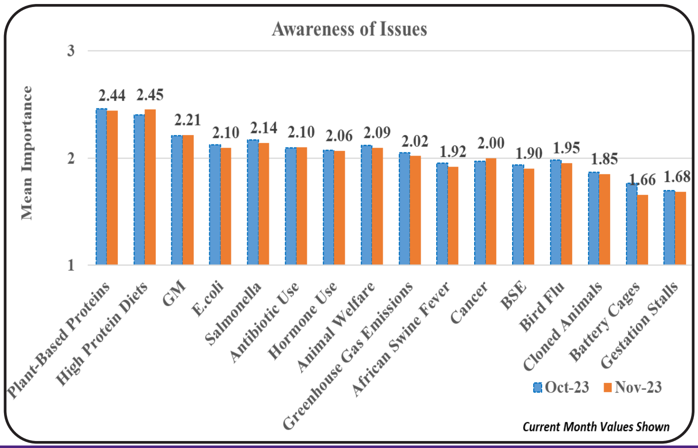
Willingness-to-pay (WTP) decreased for six evaluated Retail products, in November compared to October, including all five examined beef, pork, and chicken items. WTP increased for all evaluated Food Service meals besides Pork Chops.

The combined beef and pork projected market shares for November are 32% and 20%, respectively at the grocery store and 42% and 14% at the restaurant.

Protein Values & Issues Awareness

Freshness, Taste, Price, and Safety remain most important when purchasing protein. To guide interpretation, there are 30% more considering Price a top 4 consideration (of 12 examined) than considering Price a bottom 4 purchasing factor. Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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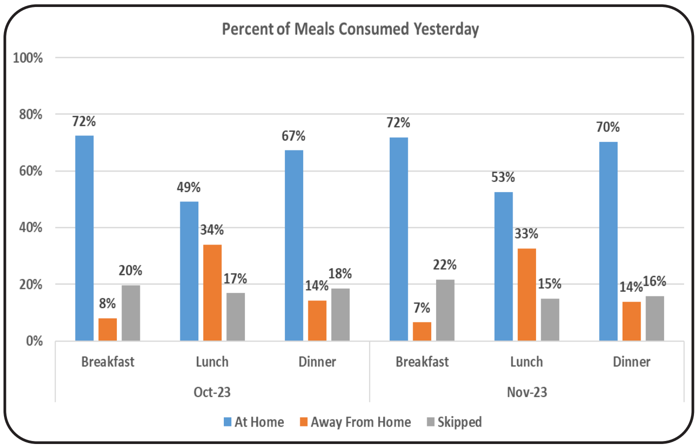
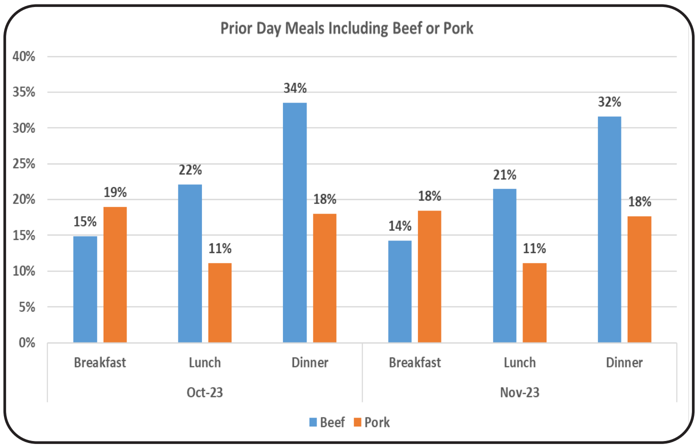
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 72%, 53%, and 70% consumed breakfast, lunch, and dinner at home in November with both lunch and dinner rates increasing from October. In November, 14%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 11%, and 18% of these meals.

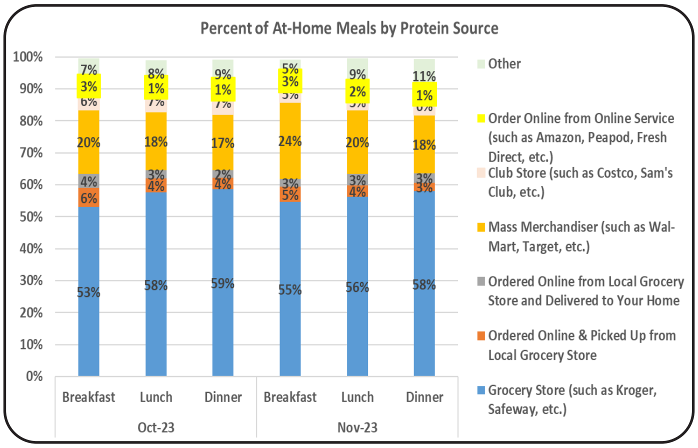


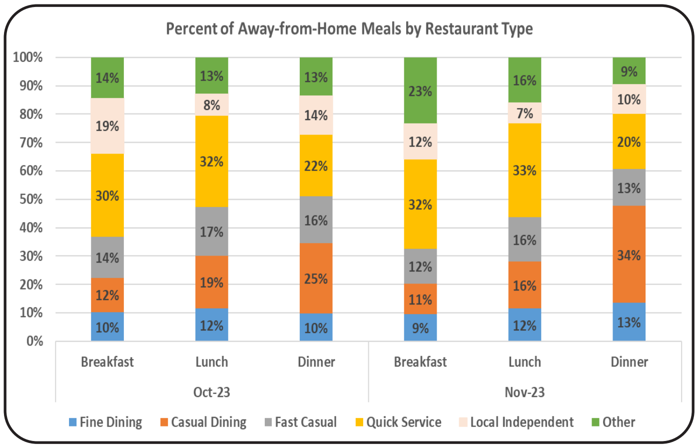


Prior Day Meals: At-Home Protein Source & Restaurant Type

In November, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 29%, 25%, and 24% 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 55%, 65%, and 67% of breakfast, lunch, and dinner meals in November.





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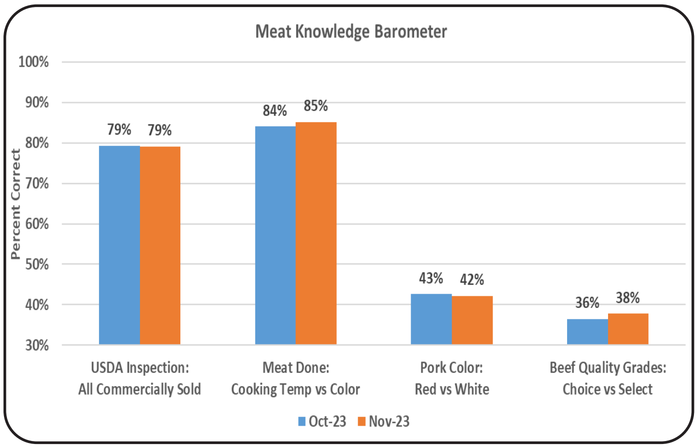
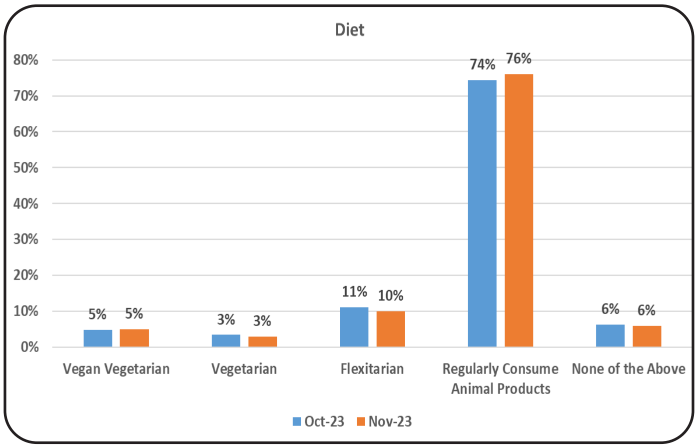
Meat Knowledge & Personal Diet

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.

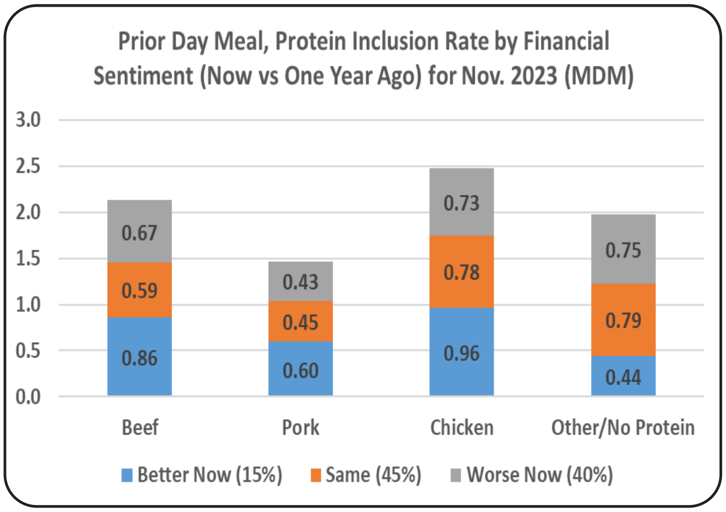
In November, 76% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

In November only 15% indicate their household finances are better than last year - a point that aligns with the ongoing high ranking of Price in Protein Values (see page 1). Those indicating improved household finances report higher prior day meal inclusion rates of beef, pork, and chicken than those saying their finances are the same (45%) or worse (40%) than last year. Perhap the biggest adjustment is those with same or worse finances are much more likely to indicate no, or other (besides beef, pork, chicken, and fish/seafood) protein being consumed the prior day.



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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