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
Sep-20 WTP ($/lb)	$16.01	$6.94	$5.69	$4.71	$7.13	$8.60	$8.29	$1.58	
Market Share	7%	21%	12%	8%	26%	4%	4%	7%	10%
Oct-20 WTP ($/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%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Sep-20 WTP ($/meal)	$25.19	$18.24	$12.75	$17.56	$16.80	$11.16	$16.86	$17.40	
Market Share	15%	23%	4%	11%	15%	4%	14%	8%	8%
Oct-20 WTP ($/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%

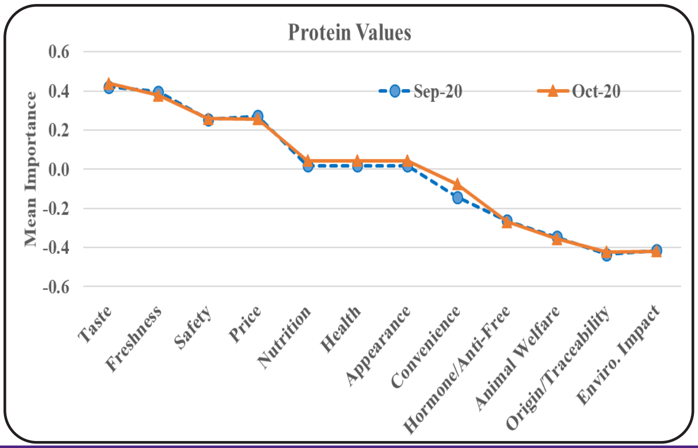
Willingness-to-pay (WTP) increased for three evaluated products in Retail and decreased for seven evaluated meals in October compared to September. WTP increased for Ribeye Steak, Ground Beef, and Pork Chops in Retail.

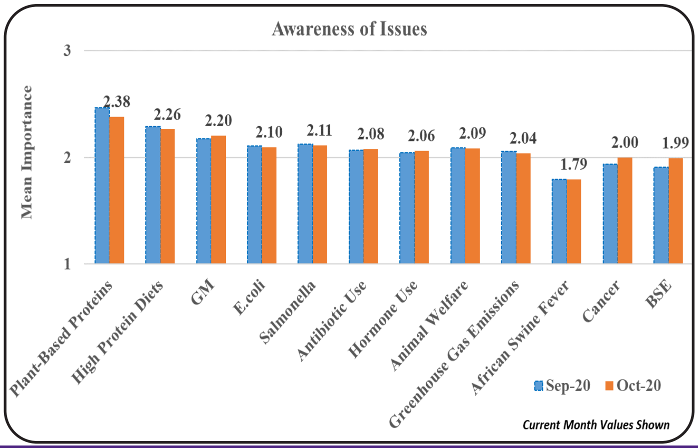
The combined beef and pork projected market shares for October are 33% and 20%, respectively at the grocery store and 34% and 14% at the restaurant.

Protein Values & Issues Awareness

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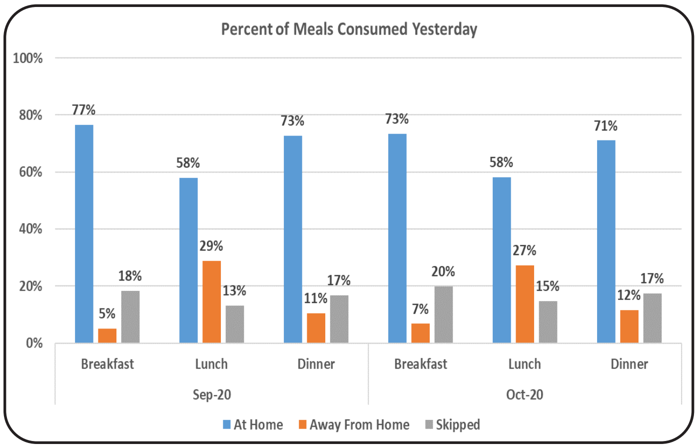
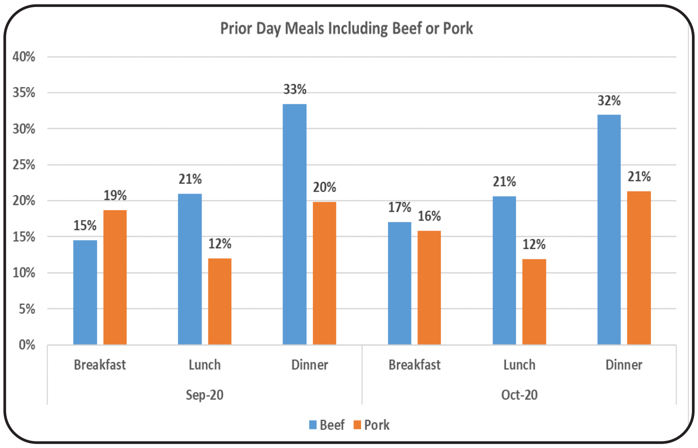
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 58%, and 71% consumed breakfast, lunch, and dinner at home in October.

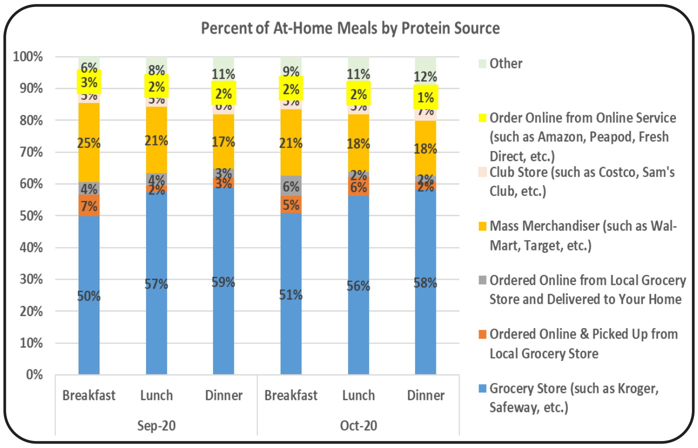
In October, 17%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 16%, 12%, and 21% of these meals.

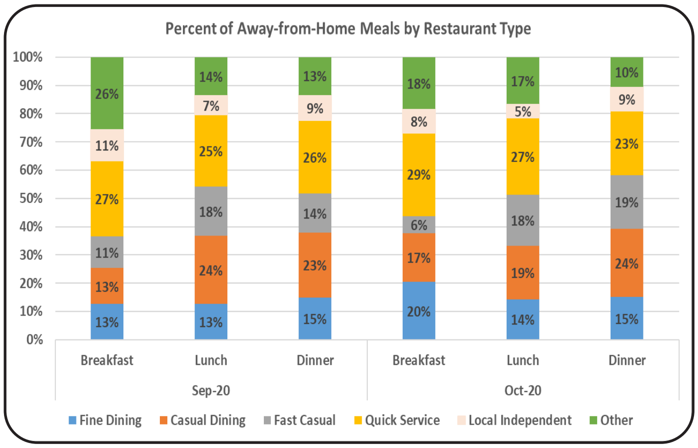




Prior Day Meals: At-Home Protein Source & Restaurant Type

In October, 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 is slightly more prevalent for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 53%, 64%, and 66% of breakfast, lunch, and dinner meals.





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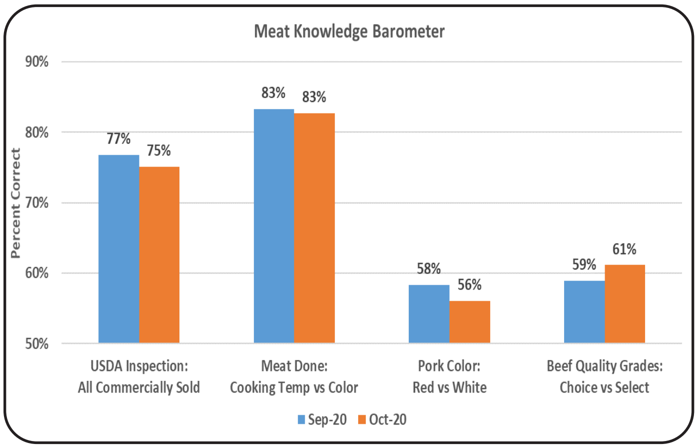
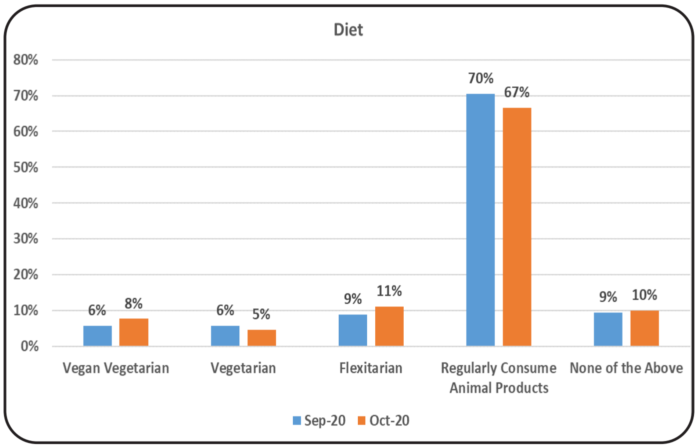
Meat Knowledge & Personal Diet

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.

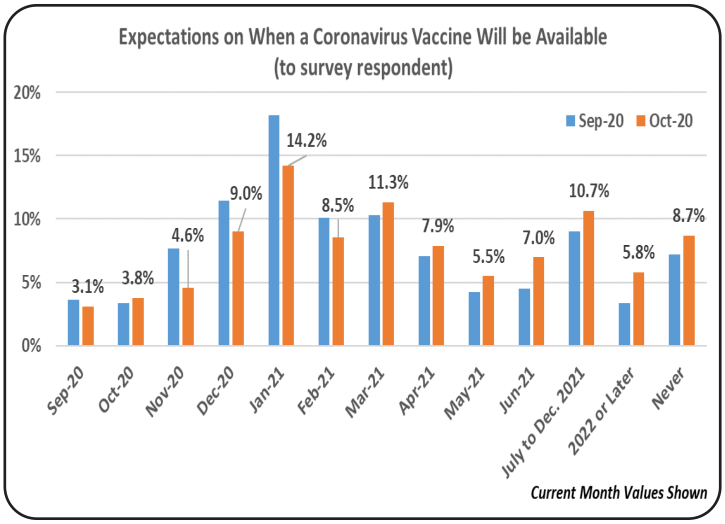
In October, 67% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 12% indicate they are either Vegan Vegetarian or Vegetarian.

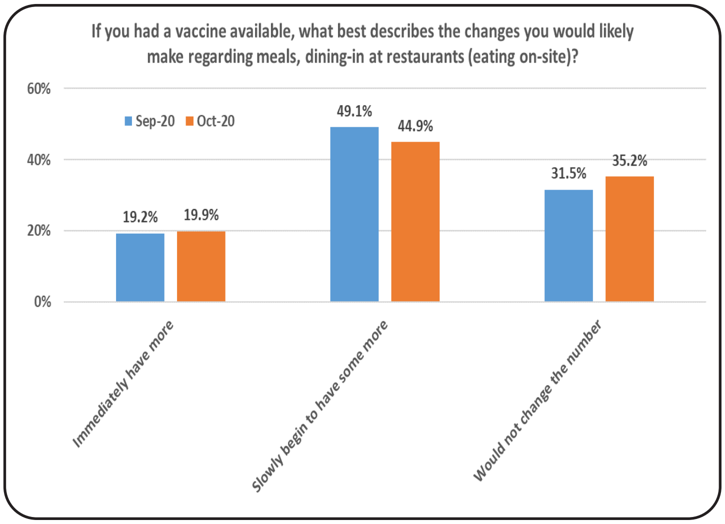




Ad Hoc Questioning

Two questions about coronavirus vaccine availability and impact were repeated from September. The most common response remains for expected availabilty in the first quarter of 2021. However overall expectations have shifted for later arrival than indicated in September. To assess possible meat demand impacts, the second question asked how dine-in meals at restaurants may be impacted. Consistent with last month, the majority indicate they will be slow, or not change, to have more on-site meals at restaurants given a vaccine was available.





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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