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-21	WTP ($/lb)	$17.70	$8.88	$7.47	$6.31	$8.57	$9.16	$10.14	$3.15	
	Market Share	8%	24%	14%	8%	25%	3%	5%	7%	7%
Oct-21	WTP ($/lb)	$18.60	$9.35	$7.90	$6.51	$8.84	$8.97	$10.33	$3.30	
	Market Share	10%	24%	14%	8%	24%	3%	5%	7%	6%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Sep-21	WTP ($/meal)	$26.24	$19.98	$15.62	$18.16	$17.77	$13.04	$17.66	$18.27	
	Market Share	14%	24%	5%	10%	14%	5%	13%	8%	7%
Oct-21	WTP ($/meal)	$27.08	$19.58	$15.47	$17.66	$17.33	$13.40	$17.21	$17.78	
	Market Share	17%	23%	5%	10%	14%	5%	12%	8%	7%

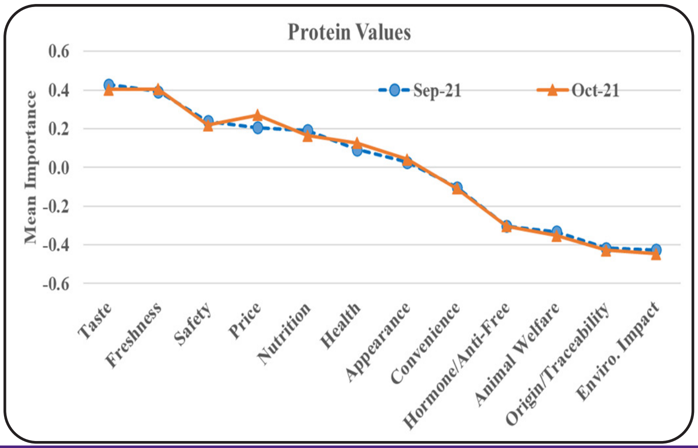
Willingness-to-pay (WTP) increased for 7 evaluated Retail products, including both Beef and Pork items, in October compared to September. Meanwhile WTP decreased for 6 evaluated Food Service meals.

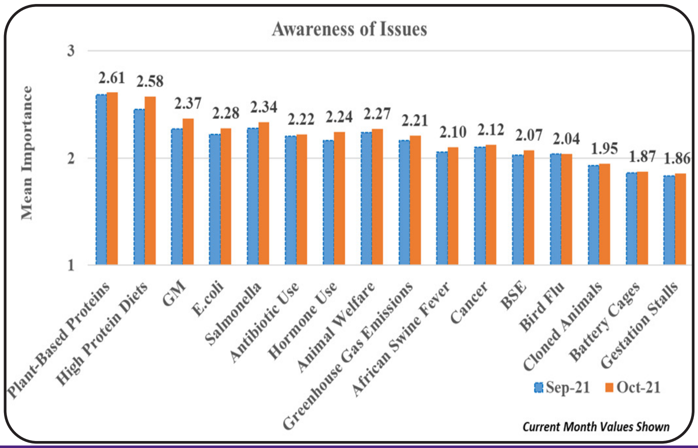
The combined beef and pork projected market shares for October are 34% and 22%, respectively at the grocery store and 40% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Price increased most in importance from last month; perhaps reflecting increased discussion on inflation on many consumer goods.

Plant-based Proteins, High Protein Diets, Salmonella, and Genetically modified foods are the topics heard or read most about.





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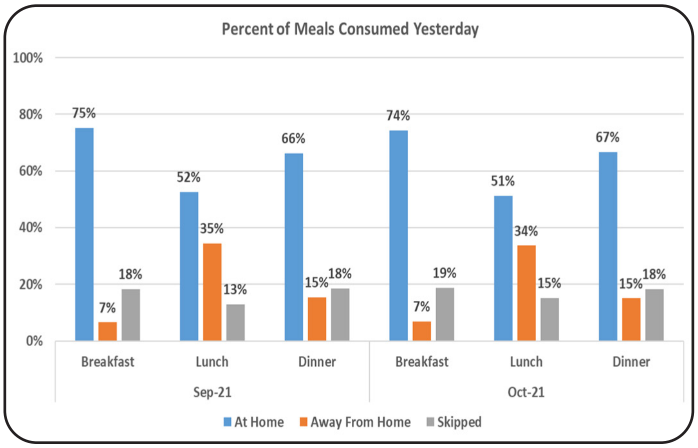
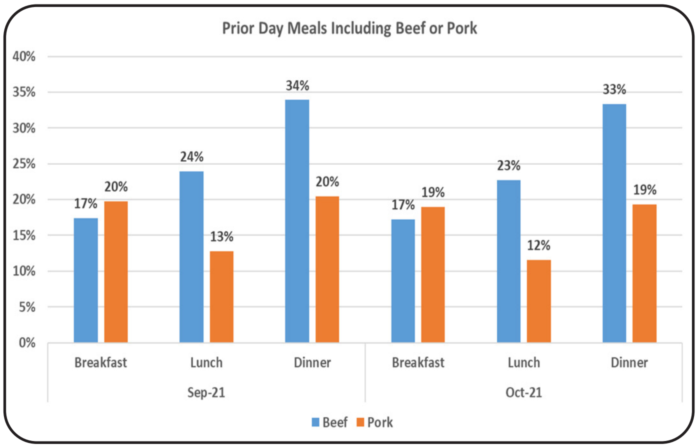
Prior Day Meals: Location & Protein Consumption Frequency

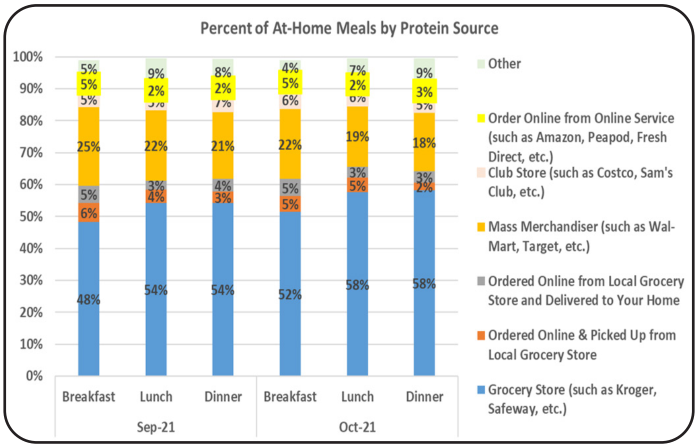
Respondents indicate 74%, 51%, and 67% consumed breakfast, lunch, and dinner at home in October. In October, 17%, 23%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 19% of these meals.

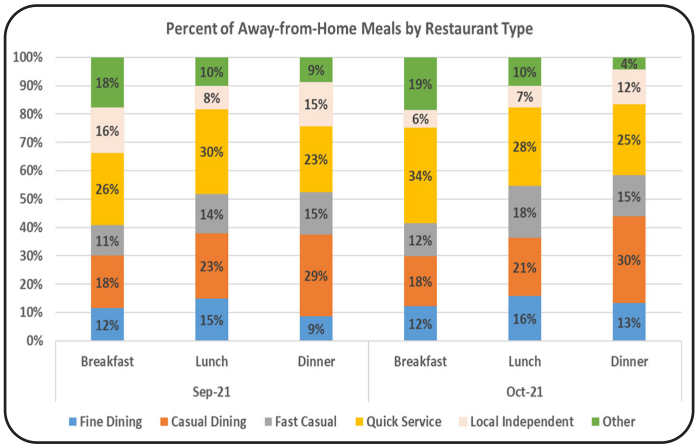




Prior Day Meals: At-Home Protein Source & Restaurant Type

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 leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 63%, 67%, and 70% of breakfast, lunch, and dinner meals in October.





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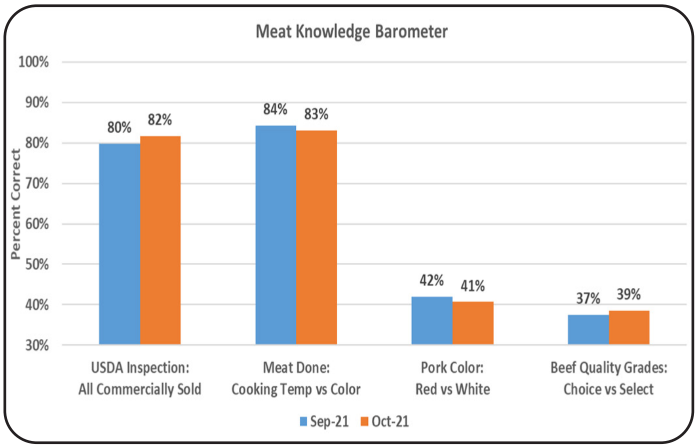
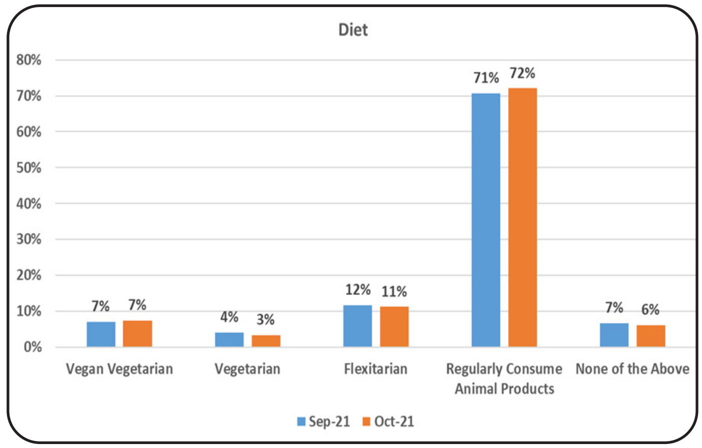
Meat Knowledge & Personal Diet

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

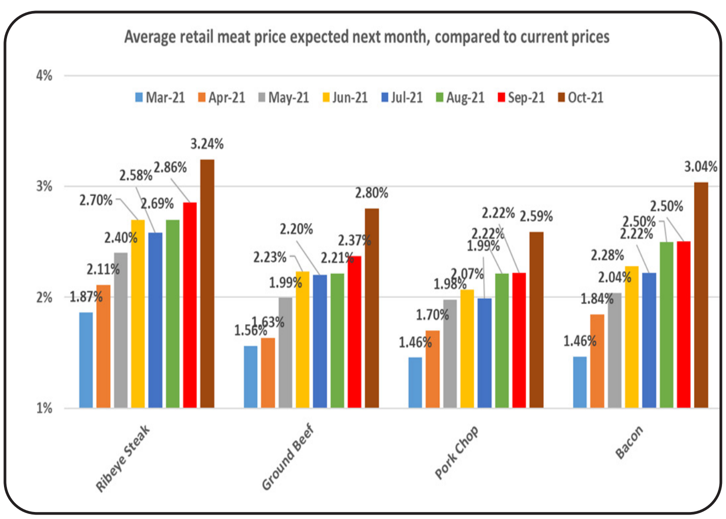
In October, 72% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

Since March of 2021 retail meat price expectations have been captured. Responses in October again suggest consumer expectations of price increases continue. These consumer expectations and realized prices continue to align with broader discussions around food (and non-food) inflation. It should be carefully noted these higher expected prices reflect both supply-side factors (e.g. higher production costs) and demand strength as noted at the beginning of this report. It should further be noted the majority (85%) indicate having either the same, or more than normal amounts of meat on-hand indicating both ongoing demand strength and supply availability.



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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