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
Aug-24 WTP ($/lb)	$17.70	$9.04	$7.49	$5.97	$8.86	$8.32	$9.78	$3.40	
Market Share	8%	24%	13%	7%	27%	2%	5%	7%	6%
Sep-24 WTP ($/lb)	$17.45	$8.61	$6.82	$5.71	$8.28	$8.44	$9.33	$2.88	
Market Share	8%	24%	12%	8%	26%	3%	4%	7%	7%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-24 WTP ($/meal)	$26.15	$19.54	$15.14	$17.58	$17.51	$12.06	$17.32	$18.69	
Market Share	15%	26%	4%	9%	15%	4%	13%	9%	6%
Sep-24 WTP ($/meal)	$27.18	$20.46	$16.33	$19.00	$18.37	$12.60	$17.97	$19.50	
Market Share	15%	26%	5%	10%	14%	3%	12%	9%	5%

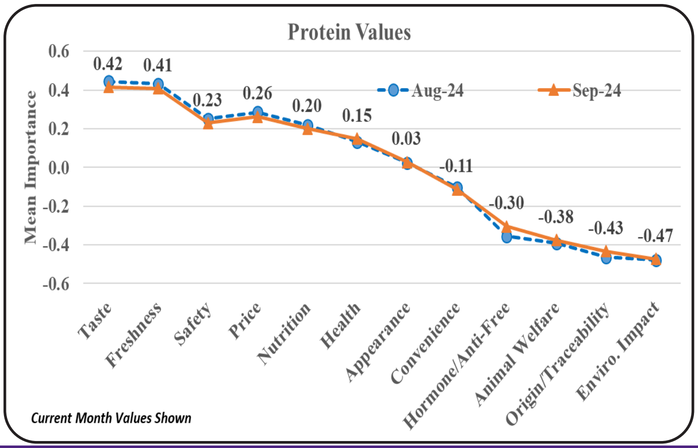
Willingness-to-pay (WTP) decreased for seven evaluated Retail products in September compared to August. WTP increased for all evaluated Food Service dinner meals in September.

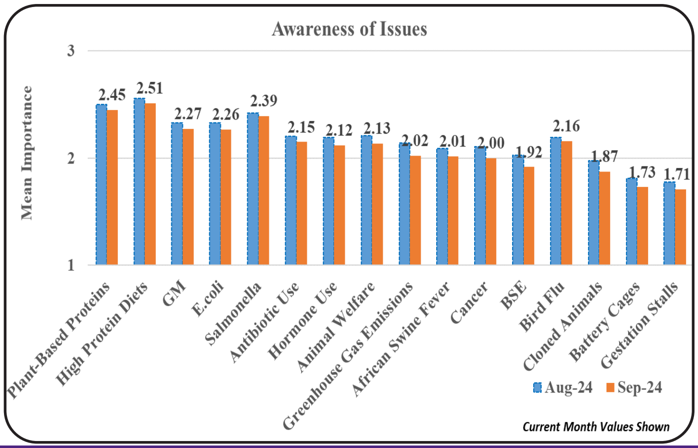
The combined beef and pork projected market shares for September are 33% and 20%, respectively at the grocery store and 41% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. To guide interpretation of these zero-sum values, there are 42% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 47% more consider Environmental Impact a bottom-4 factor than consider Environmental Impact a top-4 purchasing factor.

Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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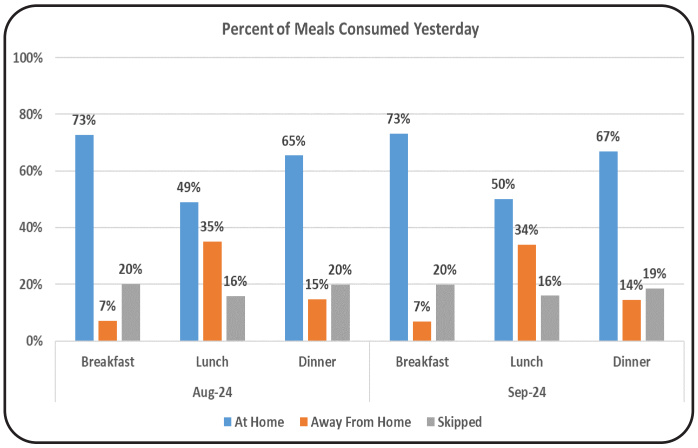
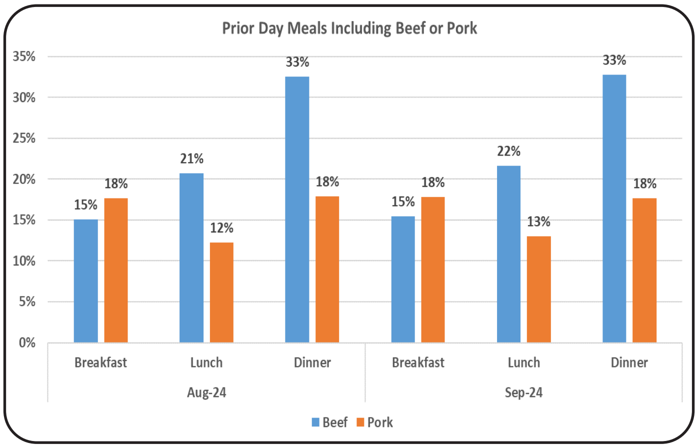
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 50%, and 67% consumed breakfast, lunch, and dinner at home in September. In September, 15%, 22%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 13%, and 18% of these meals.

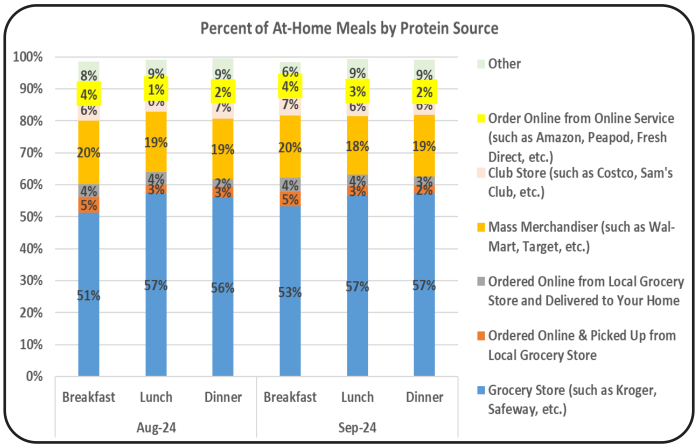


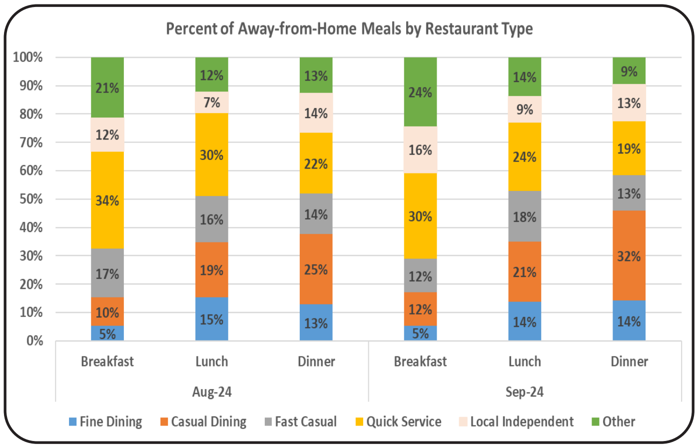


Prior Day Meals: At-Home Protein Source & Restaurant Type

In September, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 27%, 25%, and 26% 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 54%, 63%, and 63% of breakfast, lunch, and dinner meals in September.





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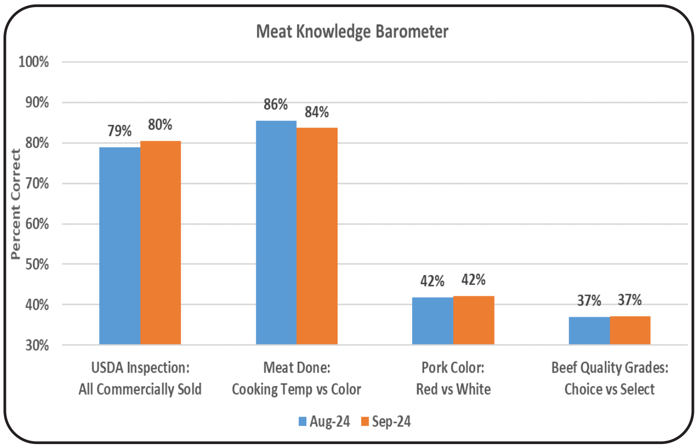
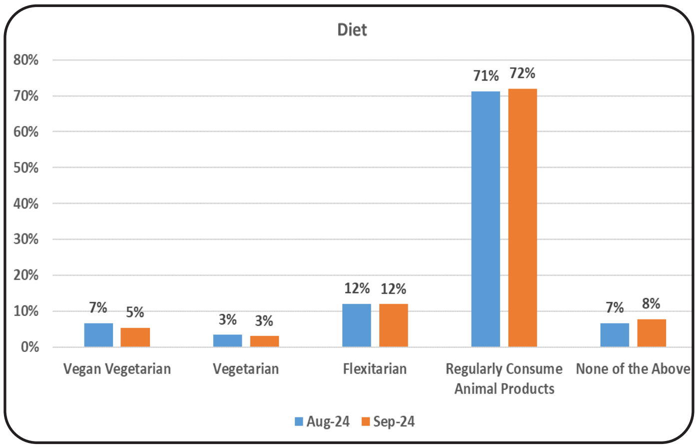
Additional MDM Project details are available at: https://www.agmanager.info/

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.

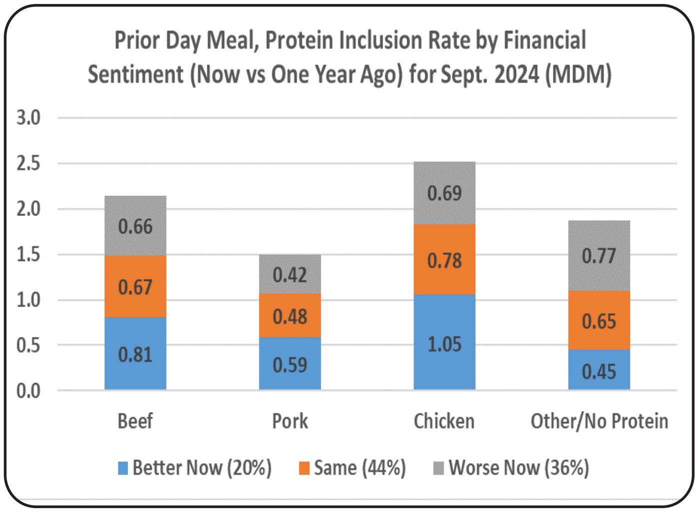
In September, 72% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

In September, 20% indicated their household finances were better than last year. Relevance of how the macroeconomic situation influences household financial sentiment follows as those reporting improving finances are much more likely to report having beef, pork, or chicken the prior day. The timeliness of this also aligns with recent reports from other data sources that consumer sentiment recently hit a 3-year low - elevating value of MDM-based measurement and calibration to meat consumption and demand.



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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