Kansas State
Department of
Agricultural Economics
Vol. 1, Issue 8 ● Sept. 2020

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-20 WTP ($/lb)	$16.35	$6.98	$5.63	$3.98	$6.99	$7.82	$8.31	$1.36	
Market Share	9%	21%	13%	7%	24%	3%	5%	7%	11%
Sep-20 WTP ($/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%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-20 WTP ($/meal)	$25.52	$18.96	$13.08	$17.04	$17.86	$12.86	$17.20	$17.97	
Market Share	14%	23%	4%	9%	16%	5%	13%	8%	7%
Sep-20 WTP ($/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%

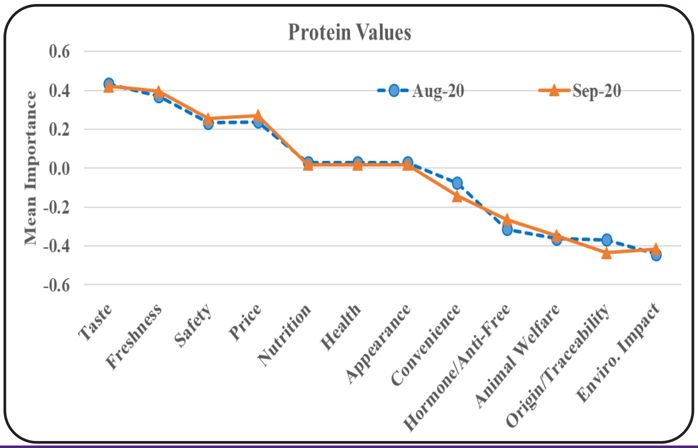
Willingness-to-pay (WTP) decreased for three evaluated products in Retail and decreased for seven evaluated meals in September compared to August. WTP increased for Pork Chops and Bacon in Retail and Baby Back Ribs in Food Service.

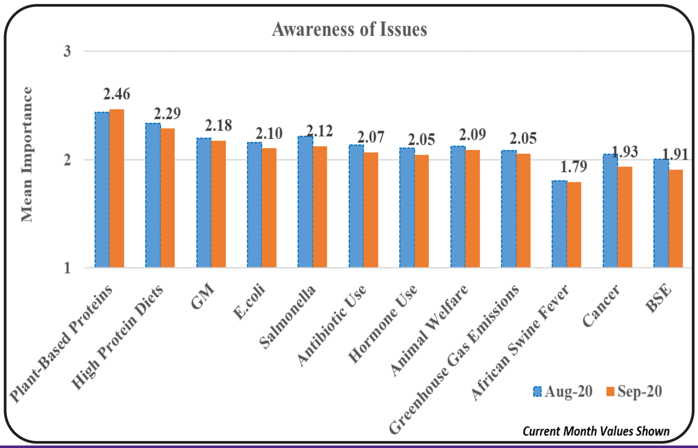
The combined beef and pork projected market shares for September are 29% and 20%, respectively at the grocery store and 37% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Hormone/Antibiotic-Free and Price increased most in importance while Origin/Traceability and Convenience 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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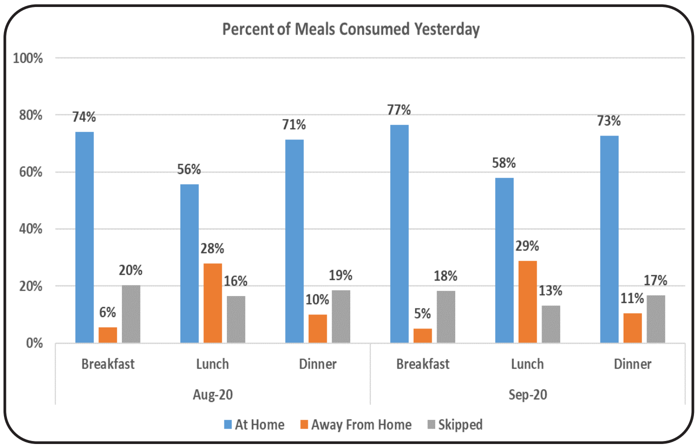
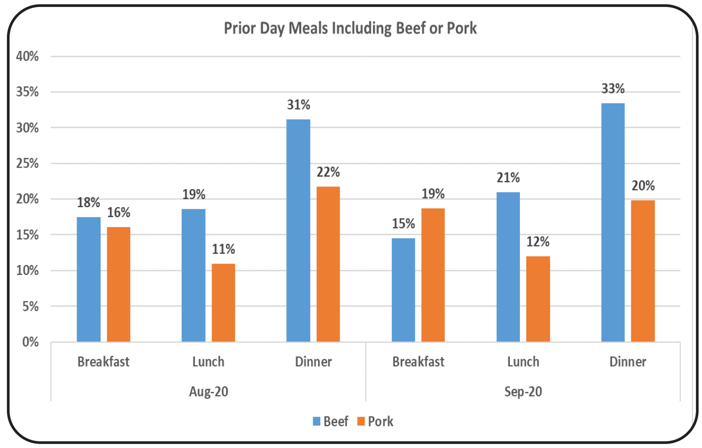
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 77%, 58%, and 73% consumed breakfast, lunch, and dinner at home in September. Prevalence of all three meals being consumed at-home was higher than in August.

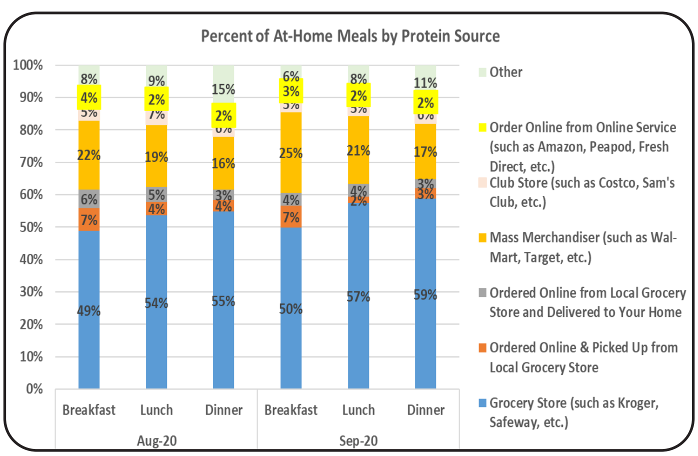
In September, 15%, 21%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 20% of these meals.

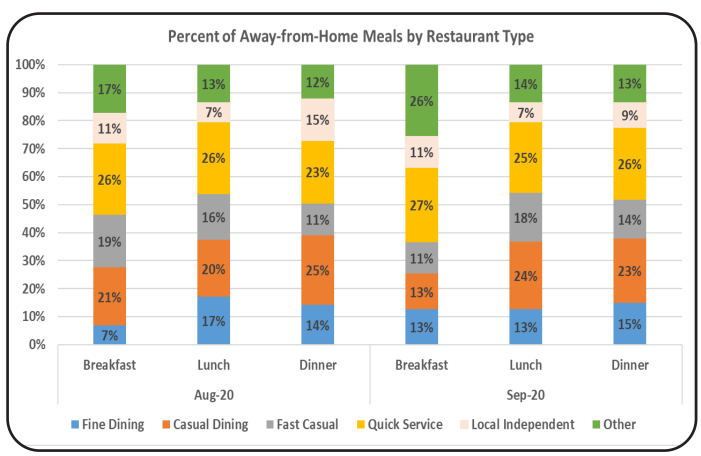




Prior Day Meals: At-Home Protein Source & Restaurant Type

In September, the protein source for at-home meals was predominantly Grocery Stores. Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for all three meals and is closely followed by Casual Dining for lunch and dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 51%, 67%, and 63% of breakfast, lunch, and dinner meals.





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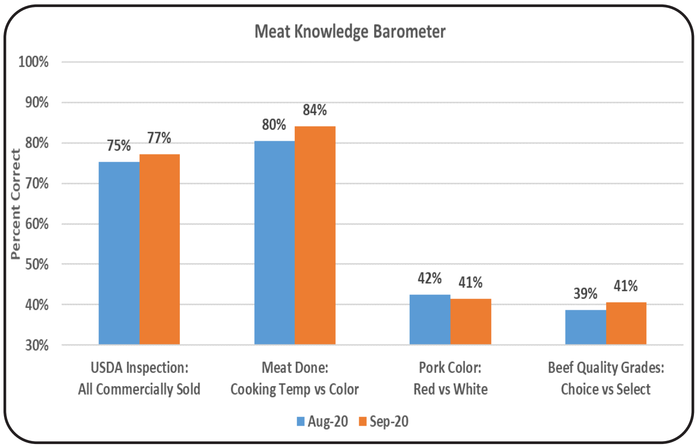
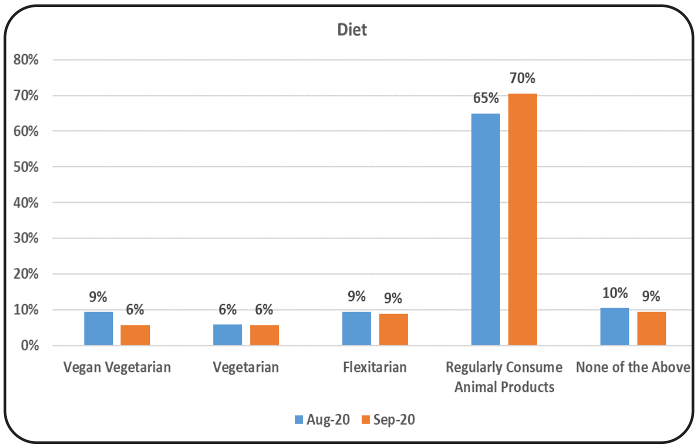
Additional MDM Project details are available at: https://www.agmanager.info/

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.

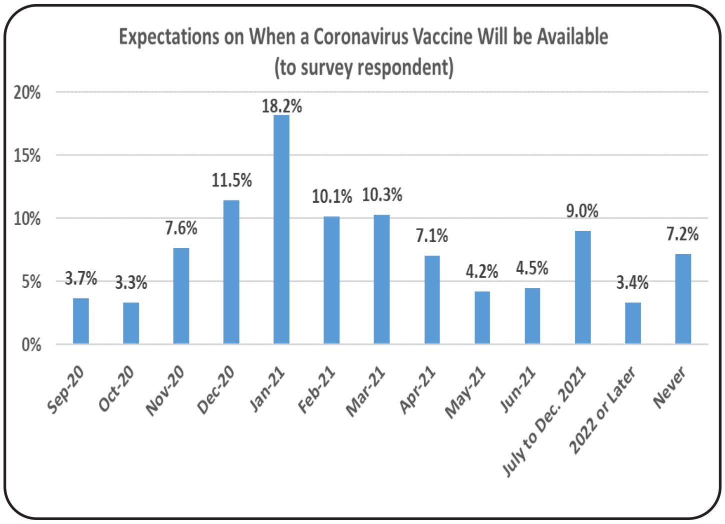
In September, 70% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.

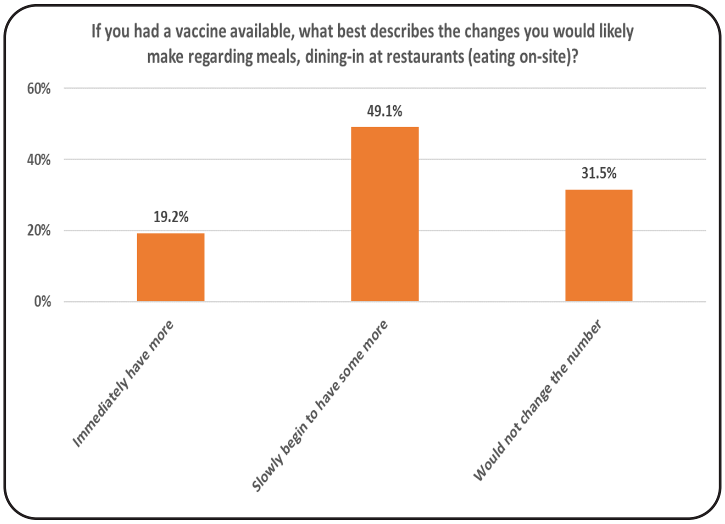




Ad Hoc Questioning

In September two questions asked about coronavirus vaccine availability and impact. The first question asked when a vaccine was expected to be avaialable to the respondent. The most common response (39%) was expected availabilty in the first quarter of 2021. To assess possible meat demand impacts, the second question asked how dine-in meals at restaurants may be impacted given access to a vaccine. The most prevalent response (49%) was to slowly begin having more on-site meals at restaurants with 32% indicating no likely change.





For more information about this publication and others, visit AgManager.info.
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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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