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-21 WTP ($/lb)	$17.65	$8.81	$7.42	$6.24	$8.53	$9.21	$9.67	$2.76	
Market Share	8%	23%	14%	9%	25%	3%	5%	6%	7%
Sep-21 WTP ($/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%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-21 WTP ($/meal)	$26.06	$19.60	$15.72	$18.93	$18.04	$14.15	$17.92	$18.58	
Market Share	14%	23%	5%	11%	15%	5%	13%	8%	6%
Sep-21 WTP ($/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%

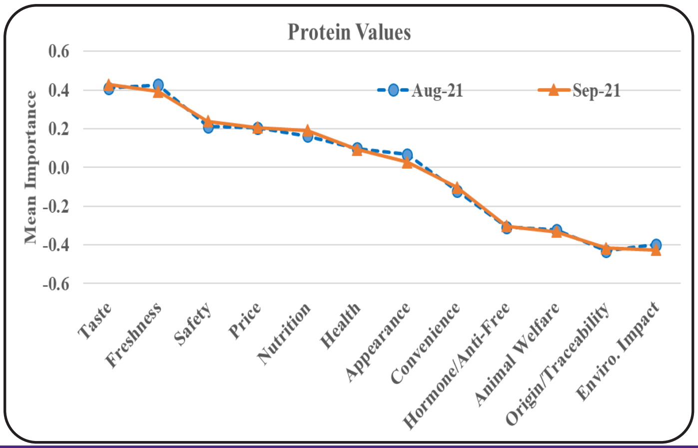
Willingness-to-pay (WTP) increased for 7 evaluated Retail products, including both Beef and Pork items, in September compared to August. Meanwhile WTP decreased for 6 evaluated Food Service meals.

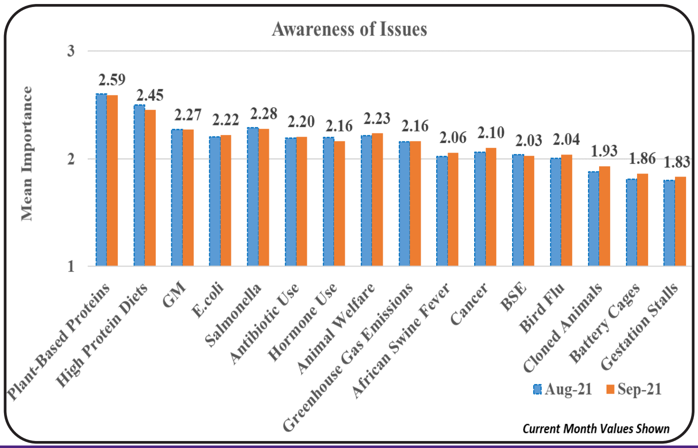
The combined beef and pork projected market shares for September are 32% and 22%, respectively at the grocery store and 38% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Safety increased most in importance while Nutrition decreased most from last month.

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





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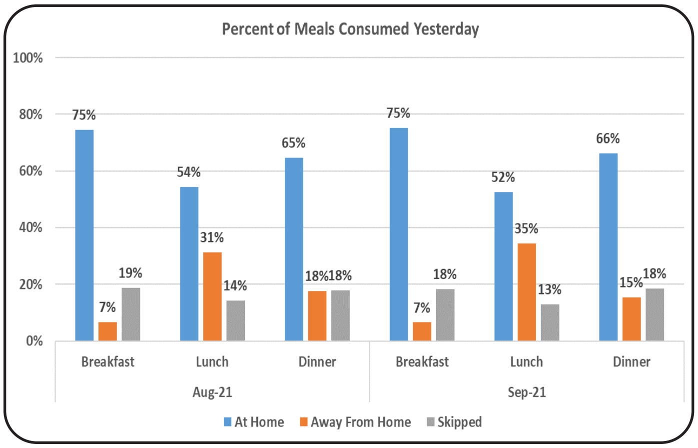
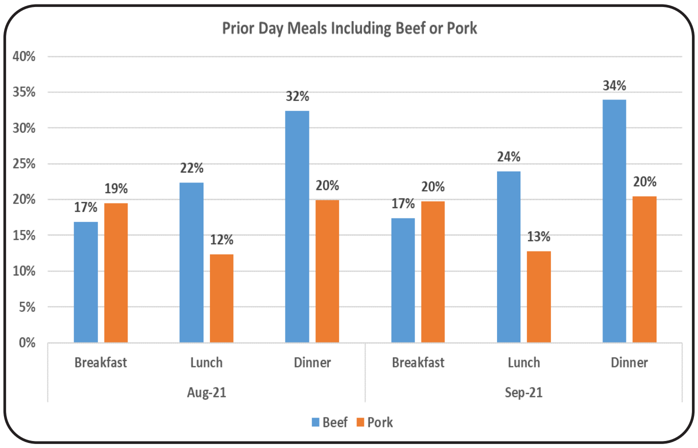
Prior Day Meals: Location & Protein Consumption Frequency

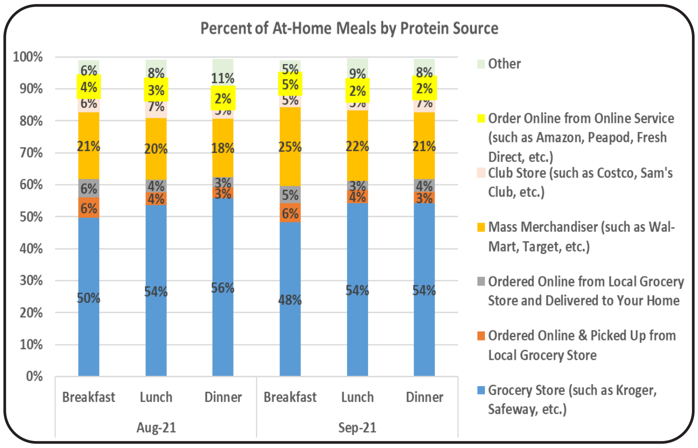
Respondents indicate 75%, 52%, and 65% consumed breakfast, lunch, and dinner at home in September. In September, 17%, 24%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 20%, 13%, and 20% of these meals.

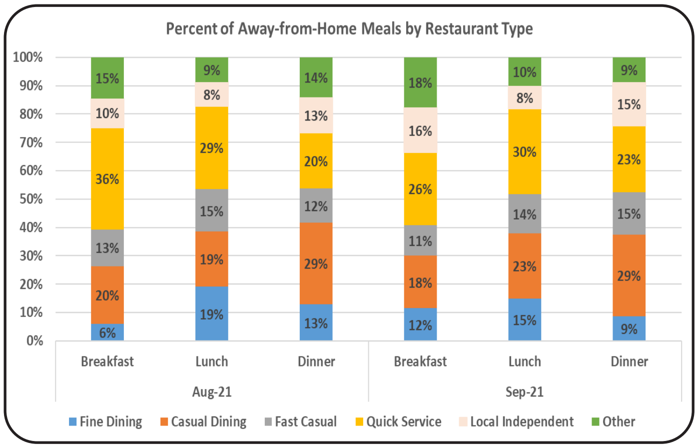




Prior Day Meals: At-Home Protein Source & Restaurant Type

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 breakfast and lunch while Casual Dining leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 55%, 67%, and 67% of breakfast, lunch, and dinner meals in September.





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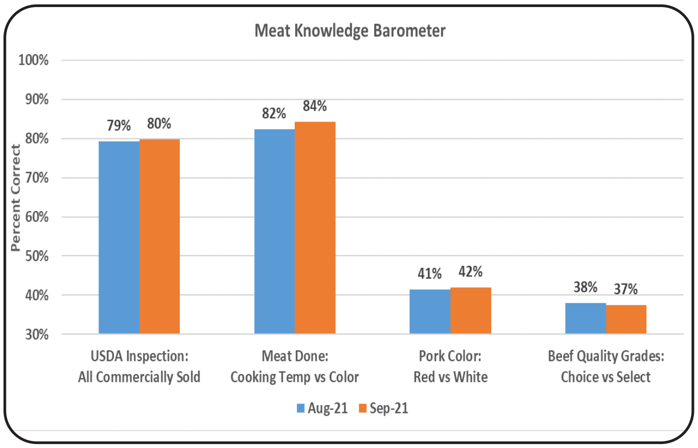
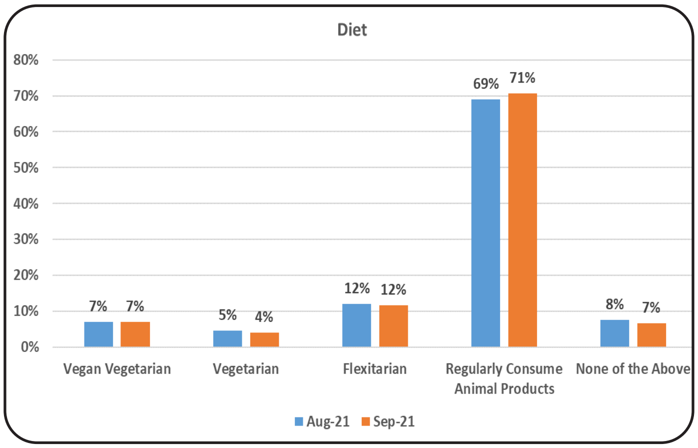
Additional MDM Project details are available at: https://www.agmanager.info/

Meat Knowledge & Personal Diet

Consistent with 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.

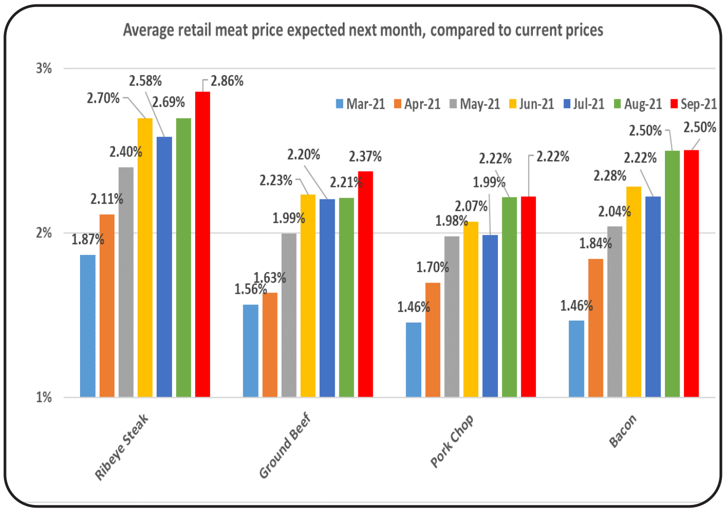
In September, 71% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

The September survey repeated a question asked since March of 2021 to assess retail meat price expectations given ongoing interest in food price inflation. Each month consumers have indicated they expect increasing retail prices for ribeye steak, ground beef, pork chop, and bacon products. Responses in September 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.



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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