KANSAS STATE
Department of
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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-22 WTP ($/lb)	$17.29	$8.55	$6.88	$5.81	$8.50	$8.98	$9.02	$3.33	
Market Share	8%	24%	12%	8%	27%	3%	4%	8%	7%
Sep-22 WTP ($/lb)	$17.24	$8.34	$6.87	$5.73	$8.16	$8.77	$9.15	$2.97	
Market Share	8%	23%	13%	8%	25%	3%	4%	8%	8%

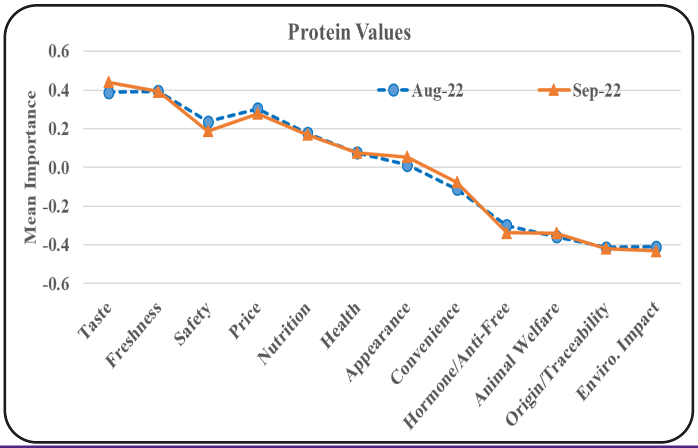
FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-22 WTP ($/meal)	$29.08	$22.79	$17.39	$20.46	$19.95	$13.88	$19.78	$20.08	
Market Share	15%	25%	5%	10%	14%	4%	13%	8%	5%
Sep-22 WTP ($/meal)	$27.23	$20.18	$16.37	$18.46	$18.58	$12.26	$18.29	$18.82	
Market Share	15%	23%	5%	10%	15%	4%	13%	8%	6%

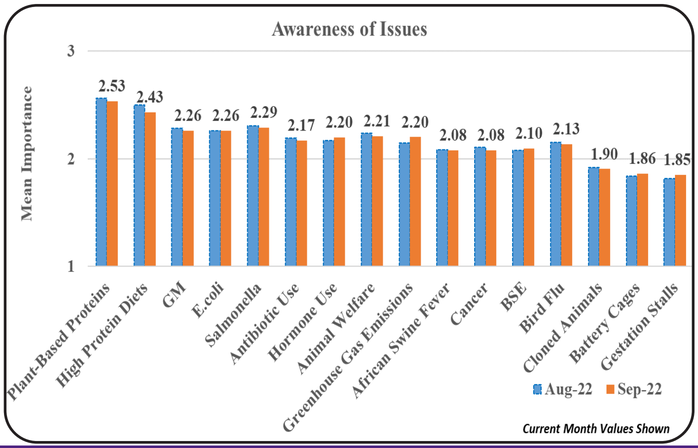
Willingness-to-pay (WTP) decreased for seven evaluated Retail products in September compared to August, including each examined beef and pork product. Similarly, WTP decreased for all evaluated Food Service meals. Combined this indicates erosion in consumer demand from August levels.

The combined beef and pork projected market shares for September are 31% and 21%, respectively at the grocery store and 39% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Price, and Safety remain most important when purchasing protein. On average, Taste is 1.6 times as important as Price while Convenience is over 5 times as important as Origin/Traceability or Environmental Impact. Plant-based Proteins and High Protein Diets remain topics heard or read most about.





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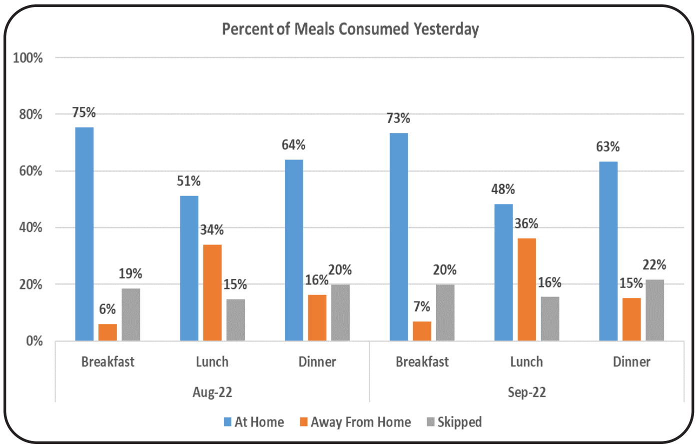
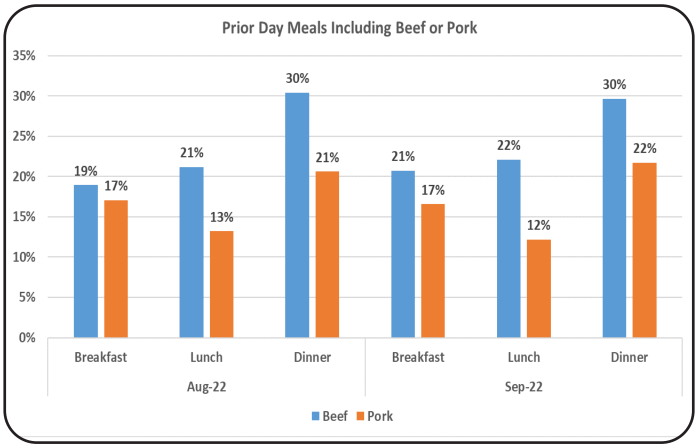
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 48%, and 63% consumed breakfast, lunch, and dinner at home in September.

In September, 21%, 22%, and 30% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 12%, and 22% of these meals.

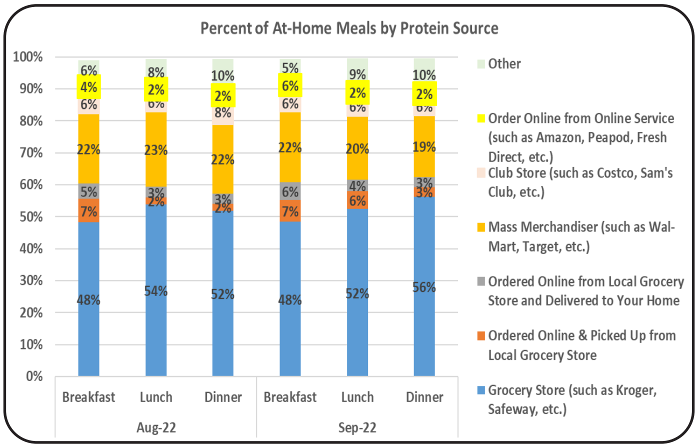


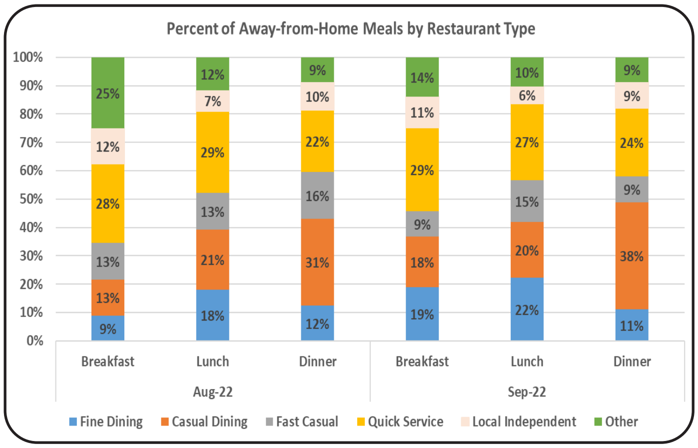


Prior Day Meals: At-Home Protein Source & Restaurant Type

In September, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 28%, 26%, and 25% of breakfast, lunch, and dinner meals.

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 56%, 61%, and 71% of breakfast, lunch, and dinner meals in September.





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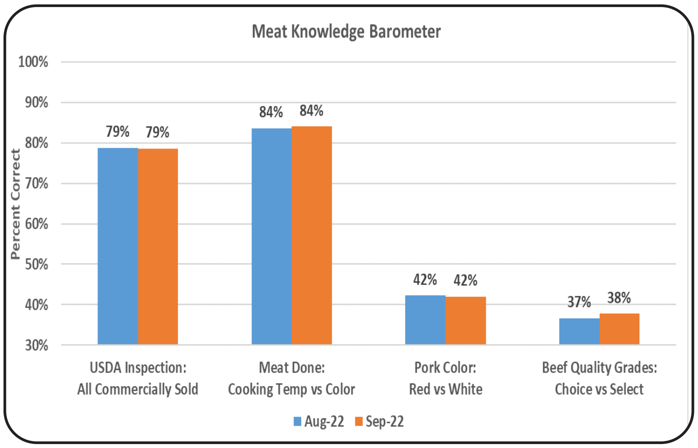
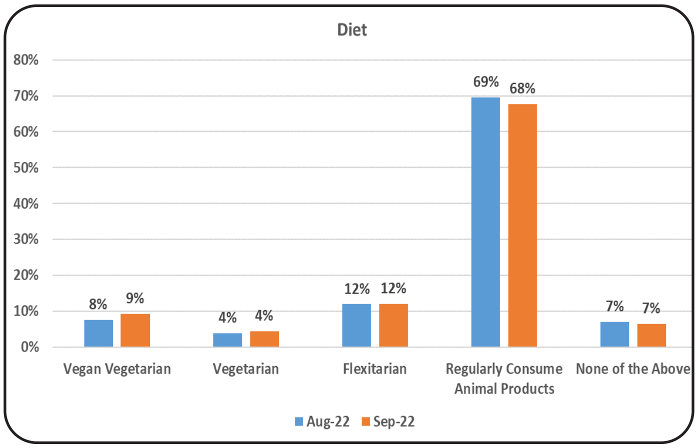
Additional MDM Project details are available at: https://www.agmanager.info/

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, 68% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 13% indicate they are either Vegan Vegetarian or Vegetarian.

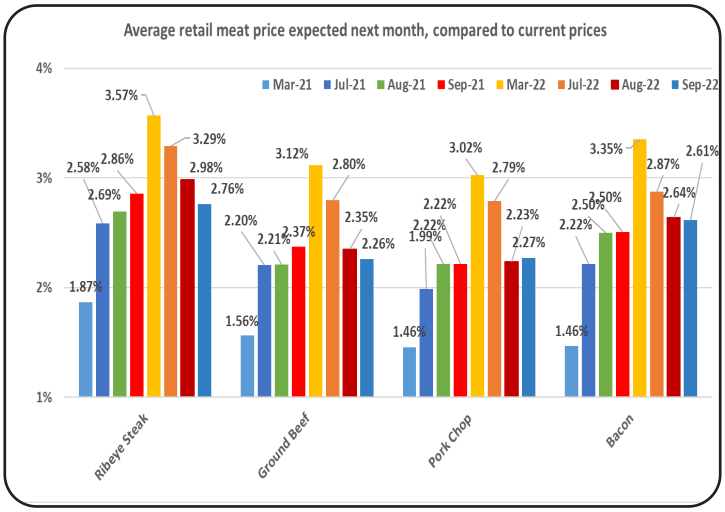


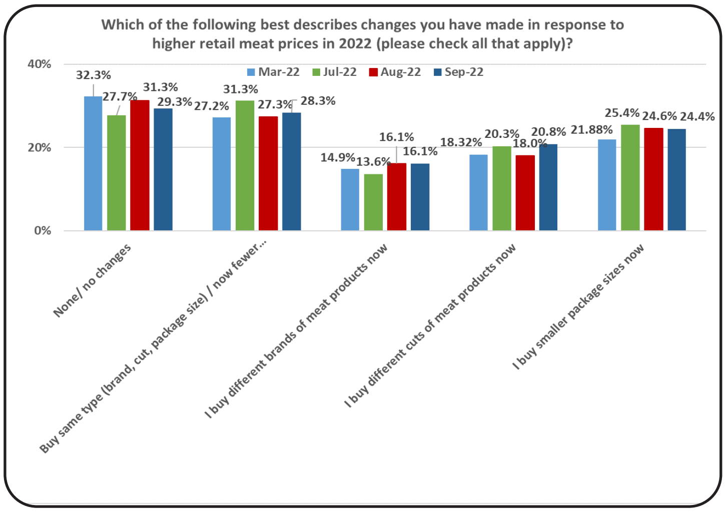


Ad Hoc Questioning

Consumers continue to expect higher retail meat prices next month. These price expectations have mitigated to approach one-year ago expectations consistent, perhaps with broader mitigating inflation expectations.

Another question was repeated asking how consumers have responded to higher retail meat prices in 2022. Among those indicating changes, 28% are reducing the volume of items purchased while being steadfast in product type (brand, cut, and package size), 21% are buying different cuts, and 24% are buying smaller packages now. Combined this signals ongoing adjustment to higher prices by over 70% of respondents.





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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