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
Jul-24	WTP ($/lb)	$17.75	$8.41	$7.01	$5.88	$8.29	$8.36	$9.51	$3.18	
	Market Share	9%	24%	13%	8%	27%	2%	4%	7%	7%
Aug-24	WTP ($/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%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jul-24	WTP ($/meal)	$27.07	$20.97	$16.41	$19.17	$18.55	$13.35	$18.81	$19.65	
	Market Share	14%	26%	5%	10%	14%	4%	14%	8%	5%
Aug-24	WTP ($/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%

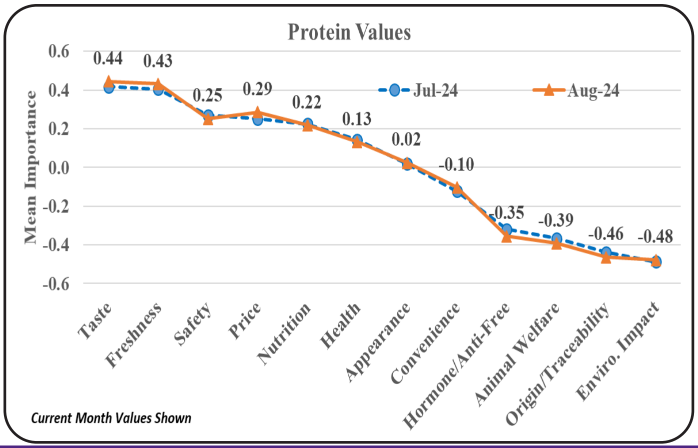
Willingness-to-pay (WTP) increased for six evaluated Retail products in August compared to July. WTP decreased for all evaluated Food Service dinner meals in August.

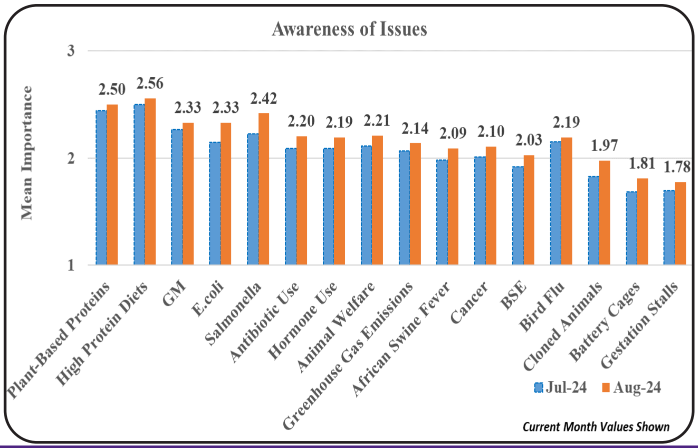
The combined beef and pork projected market shares for August are 32% and 21%, respectively at the grocery store and 41% and 14% at the restaurant.

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 44% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 48% 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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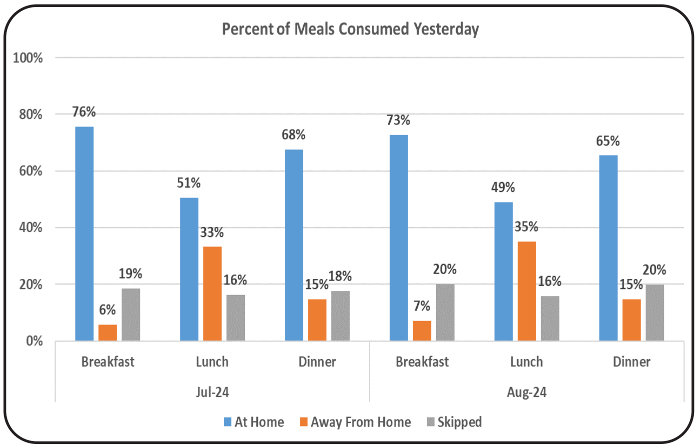
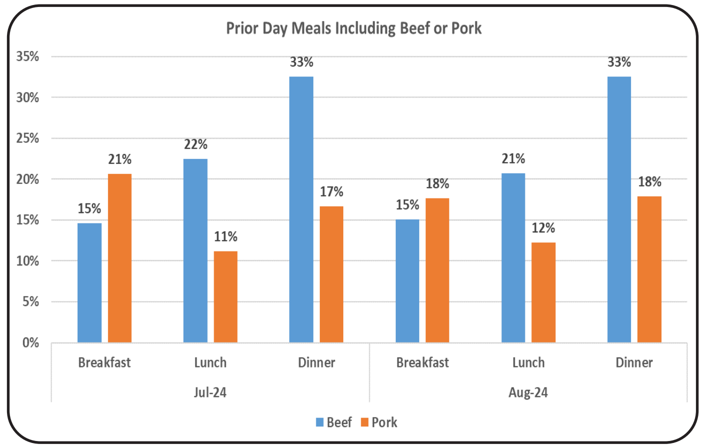
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 65% consumed breakfast, lunch, and dinner at home in August with all three meal rates decreasing from July. In August, 15%, 21%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 18% of these meals.

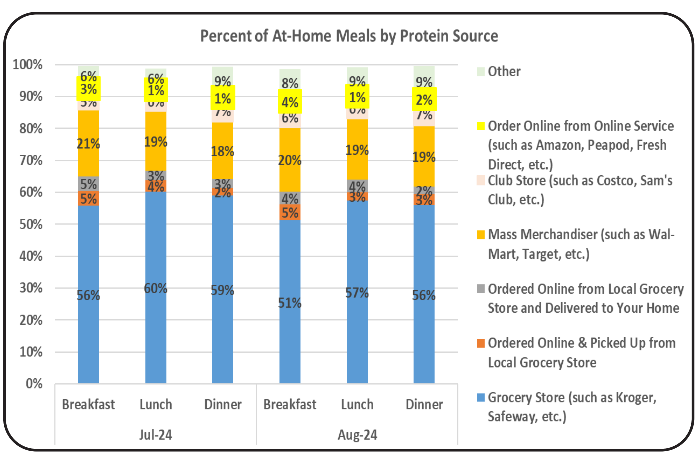


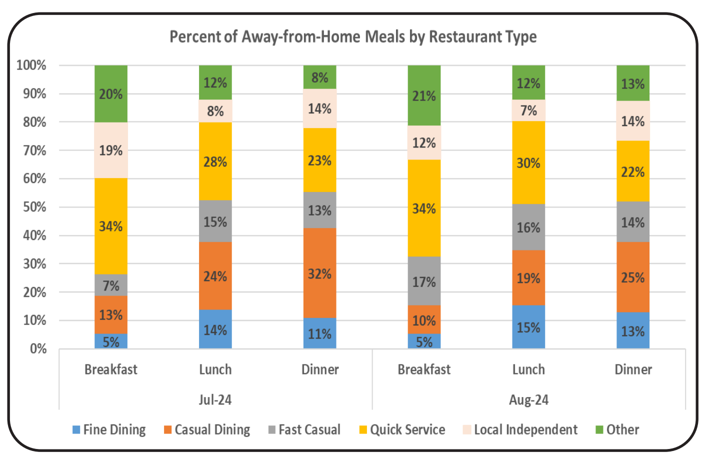


Prior Day Meals: At-Home Protein Source & Restaurant Type

In August, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 26%, 26%, and 27% 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 62%, 65%, and 61% of breakfast, lunch, and dinner meals in August.





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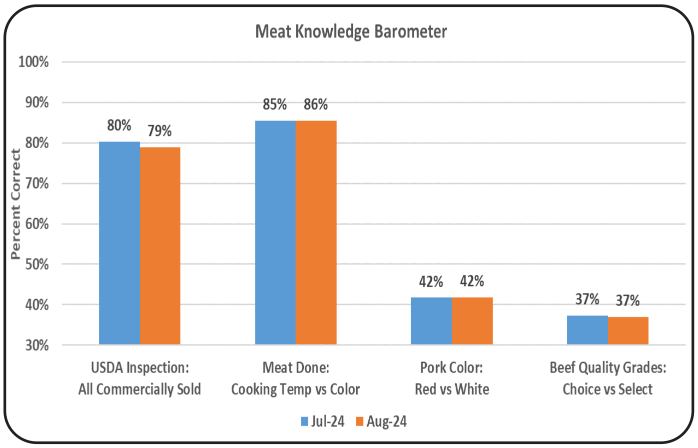
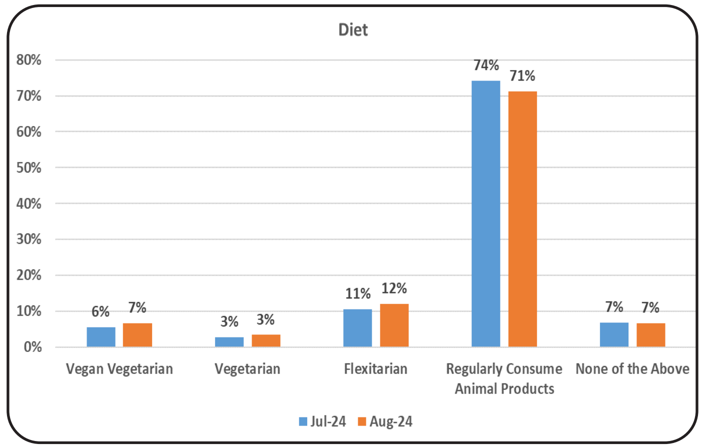
Additional MDM Project details are available at: https://www.agmanager.info/

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.

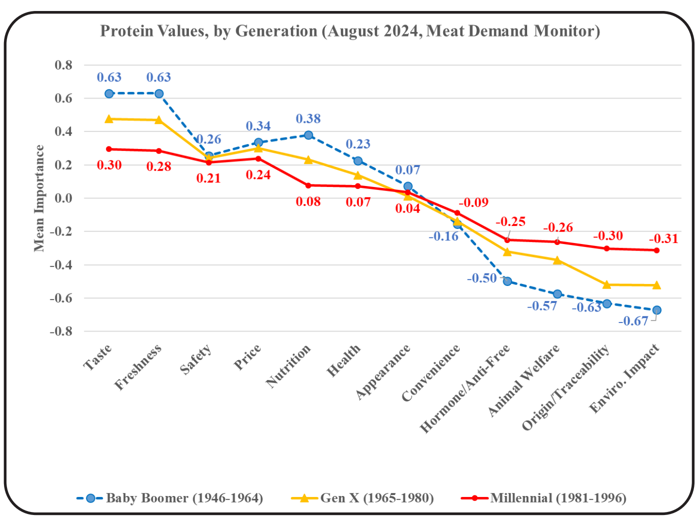
In August, 71% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 10% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

Given ongoing interest in generational differences here Protein Values are shown seperately for Baby Boomer, Gen X, and Millennils. The ordinal rank being very similar across generations suggests common order of importance when making protein purchasing decisions. The "steeper" line for Baby Boomers implies higher importance (relative to younger generations) in Taste and Freshness vs. issues such as Environmental Impact, Origin/Traceability, or Animal Welfare. To illustrate this, Baby Boomers consider Taste 1.9 times as important as Price in making protein purchasing decisions vs. a relative importance of 1.2 times for Millenneials.



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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

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BEEF

Funded in part by the Beef Checkoff.

pork checkoff

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