

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
Nov-20 WTP (\$/lb)	\$15.99	\$7.29	\$5.84	\$4.47	\$7.24	\$7.40	\$8.39	\$1.27	
Market Share	8%	22%	13%	8%	25%	3%	5%	6%	10%
Dec-20 WTP (\$/lb)	\$16.10	\$7.39	\$6.06	\$4.75	\$6.99	\$7.61	\$8.47	\$1.66	
Market Share	7%	24%	14%	8%	24%	3%	5%	6%	10%

FOOD SERVICE	Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Nov-20 WTP (\$/meal)	\$24.01	\$17.32	\$12.64	\$16.45	\$15.81	\$12.05	\$15.96	\$15.68	
Market Share	14%	23%	4%	10%	15%	5%	14%	7%	9%
Dec-20 WTP (\$/meal)	\$24.73	\$17.60	\$11.97	\$16.89	\$15.68	\$12.11	\$17.28	\$16.88	
Market Share	14%	22%	3%	10%	13%	5%	16%	8%	8%

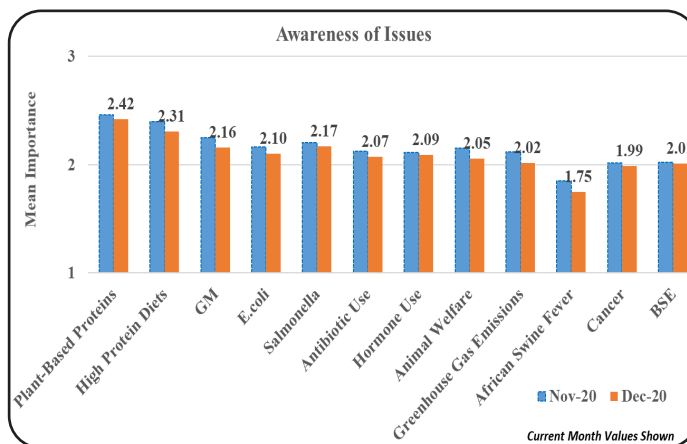
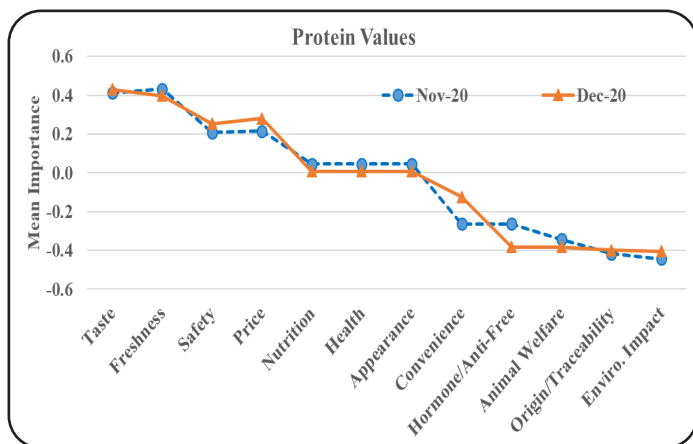
Willingness-to-pay (WTP) increased for seven evaluated products in Retail including Ribeye Steak, Ground Beef, Pork Chops and Bacon in December compared to November. WTP increased for six evaluated Food Service meals including three of the four meals with beef and pork entrees.

The combined beef and pork projected market shares for December are 31% and 21%, respectively at the grocery store and 36% and 14% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Convenience and Price increased most in importance while Hormone/Antibiotic-Free decreased most from last month.

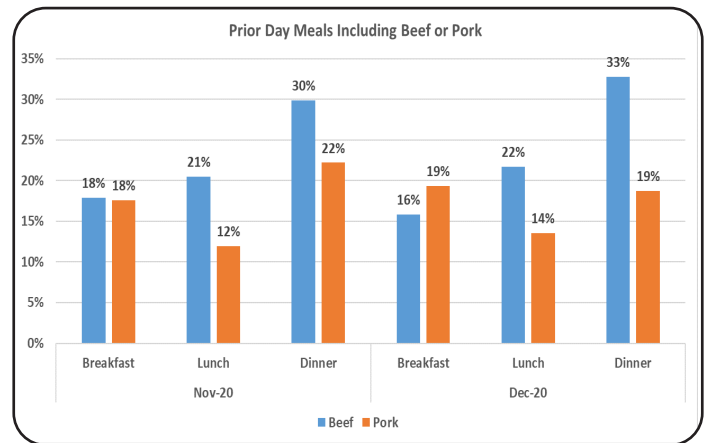
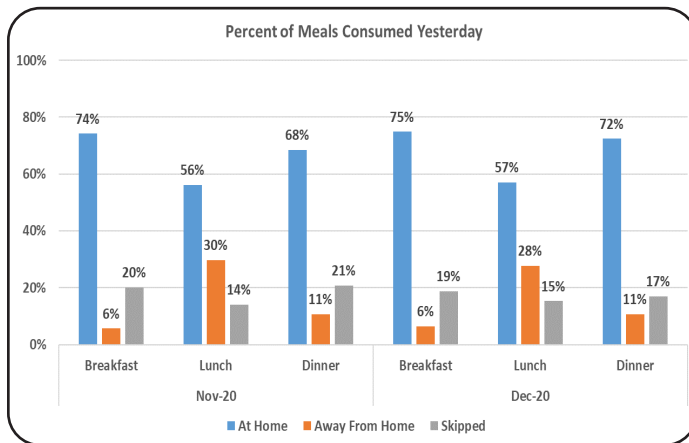
Plant-based Proteins, High Protein Diets, and Genetically modified foods are the topics heard or read most about.



Prior Day Meals: Location & Protein Consumption Frequency

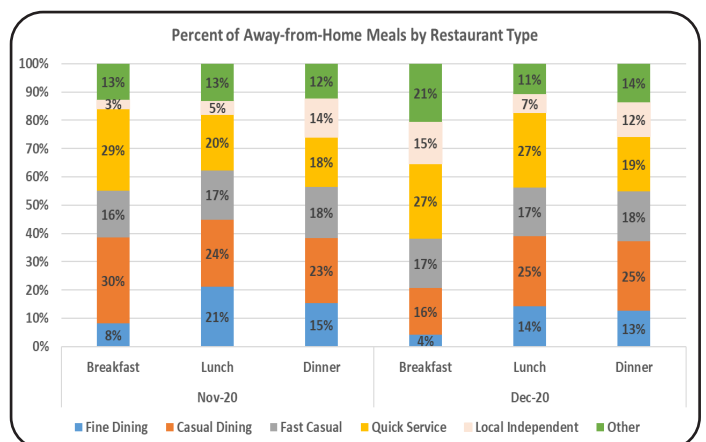
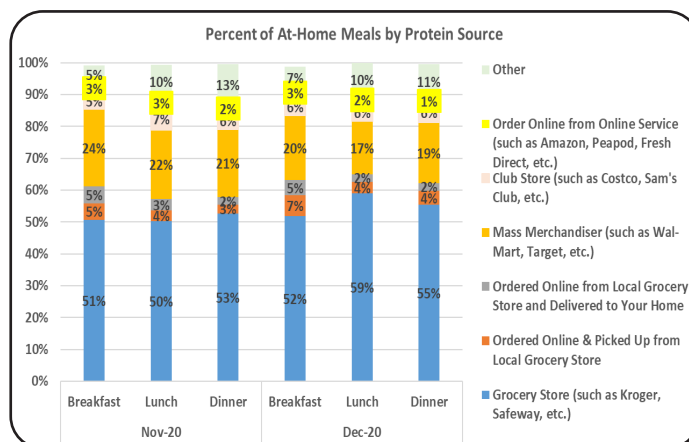
Respondents indicate 75%, 57%, and 72% consumed breakfast, lunch, and dinner at home in December - all values being higher than in November.

In December, 16%, 22%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 14%, and 19% of these meals.



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

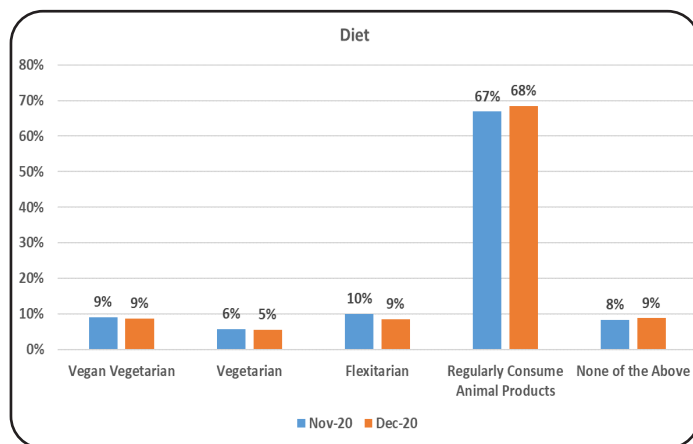
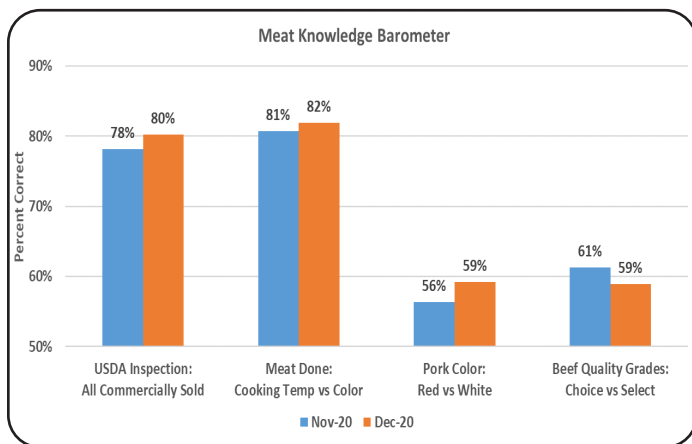
In December, the protein source for at-home meals was predominantly Grocery Stores. Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for breakfast and lunch while Casual Dining is more prevalent for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 60%, 68%, and 62% of breakfast, lunch, and dinner meals.



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.” Nearly one-half of respondents incorrectly respond to questions on pork color and beef quality grade information.

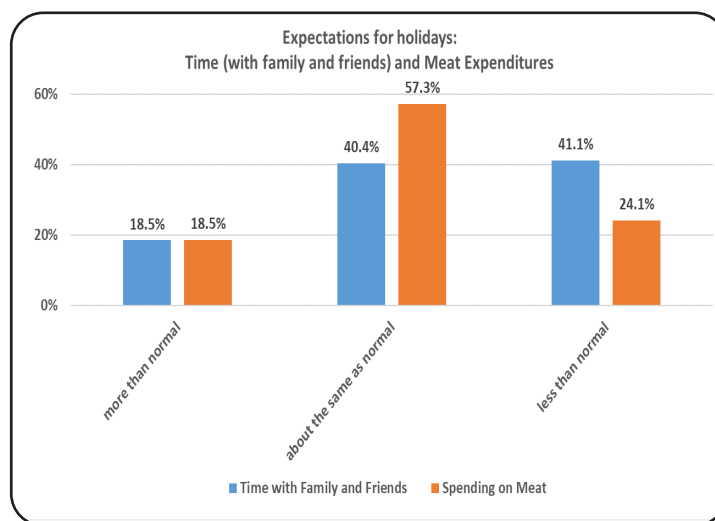
In December, 68% of respondents self-declare as regular consumers of products derived from animal products, 9% indicate they are Flexitarian/Semi-Vegetarian, and a combined 14% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

Two questions about holiday plans were repeated from November. The intent here is to gain insight on expectations regarding time spent with family and friends as well as the amount spent on meat during holiday celebrations to enhance knowledge around holiday meat demand.

Considering time with family and friends, 19%, 40%, and 41% plan to spend more, the same, and less than normal, respectively during the holidays. Meanwhile, 19%, 57%, and 24% expect to spend more, the same, and less on meat during these celebrations. Observing a larger reduction, compared to normal, regarding time with others compared to meat spending may reflect an intent to “upgrade” the protein included in this year’s holiday meals.



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>

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**Funded in part by
the Beef Checkoff.**

