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
Jan-21	WTP ($/lb)	$16.59	$7.13	$6.20	$4.43	$7.07	$8.08	$8.56	$2.50	
	Market Share	9%	21%	14%	7%	24%	3%	5%	8%	10%
Feb-21	WTP ($/lb)	$15.79	$7.29	$6.02	$5.00	$7.29	$8.89	$8.92	$2.01	
	Market Share	6%	22%	13%	8%	26%	4%	5%	7%	9%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Jan-21	WTP ($/meal)	$25.54	$18.27	$13.90	$17.01	$15.85	$11.98	$16.27	$17.46	
	Market Share	16%	23%	4%	10%	13%	5%	13%	8%	8%
Feb-21	WTP ($/meal)	$25.28	$18.21	$14.74	$17.63	$16.91	$13.00	$16.78	$18.03	
	Market Share	14%	22%	5%	11%	14%	5%	13%	9%	7%

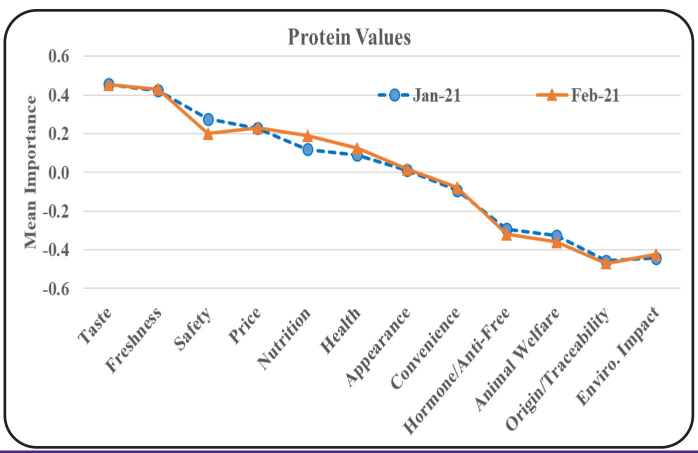
Willingness-to-pay (WTP) increased for five evaluated products in Retail including Ground Beef and Bacon in February compared to January. WTP increased for six evaluated Food Service meals including both meals with pork entrees.

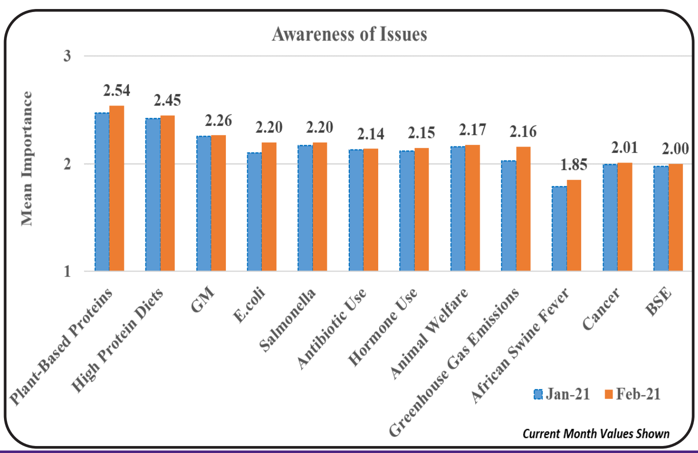
The combined beef and pork projected market shares for February are 29% and 21%, respectively at the grocery store and 36% and 16% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Environmental Impact increased most in importance while Safety 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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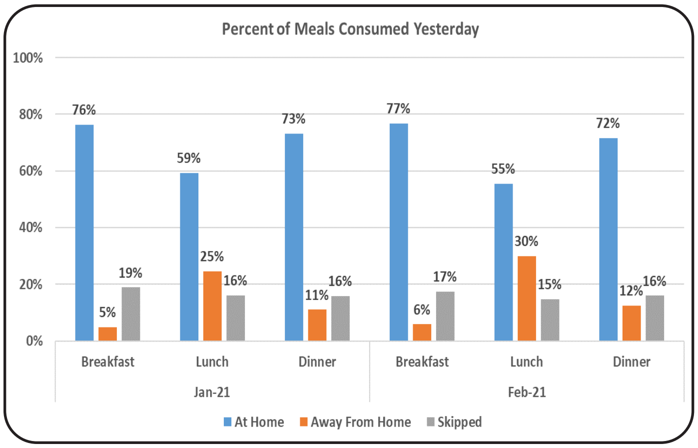
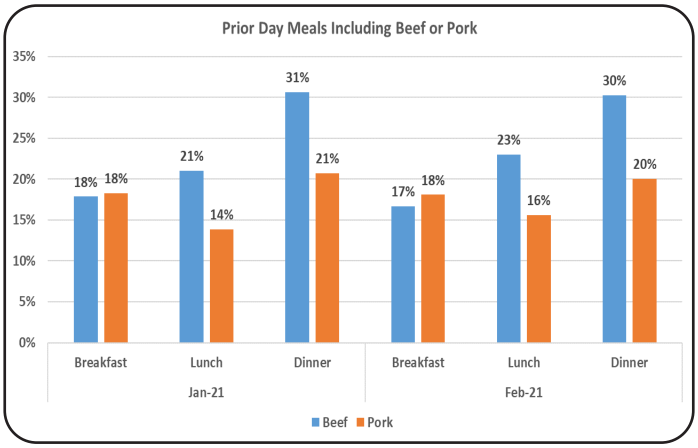
Prior Day Meals: Location & Protein Consumption Frequency

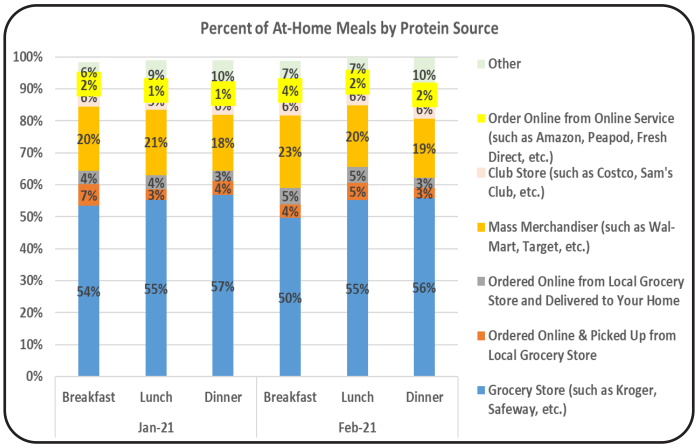
Respondents indicate 77%, 55%, and 72% consumed breakfast, lunch, and dinner at home in February. In February, 17%, 23%, and 30% had beef their prior day breakfast, lunch, and dinner. Pork was included in 18%, 16%, and 20% of these meals.

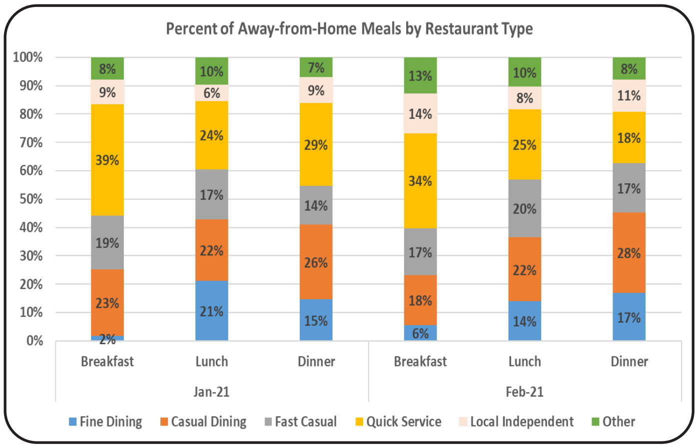




Prior Day Meals: At-Home Protein Source & Restaurant Type

In February, 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 lead for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 68%, 68%, and 64% of breakfast, lunch, and dinner meals in February.





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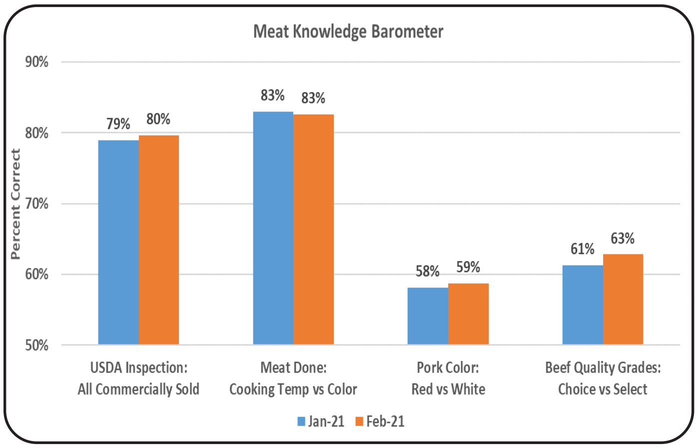
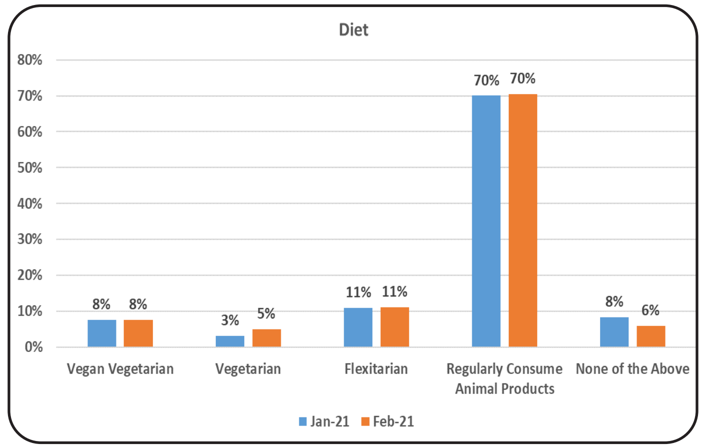
Additional MDM Project details are available at: https://www.agmanager.info/

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

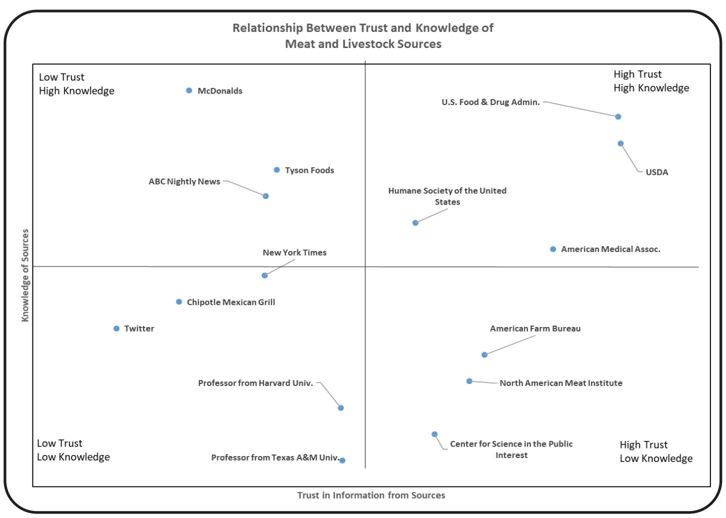
In February, 70% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 13% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

The February survey included a question assessing how trustworthy information is from 15 meat and livestock sources. Subsequently, respondents were asked how much they know about each source. The following scatterplot shows the relationship between respondent trust and knowledge. Respondents have a high level of trust and knowledge for USDA and FDA. The other 13 sources rank lower in trust, with only McDonalds ranking higher than USDA and FDA in respondent knowledge. Taken broadly these relationships are very similar to what Dr. Lusk found in February 2014 (see [FooDS survey](#)) when asked on a similar, but not exactly same list of sources.



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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