Kansas State
Department of Agricultural Economics
Vol. 5, Issue 6 • June 2024

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
May-24	WTP ($/lb)	$17.45	$8.45	$7.18	$5.91	$8.42	$8.77	$9.30	$3.04	
	Market Share	8%	24%	13%	8%	28%	2%	4%	7%	7%
Jun-24	WTP ($/lb)	$19.95	$9.11	$7.62	$6.50	$8.87	$7.21	$9.19	$3.74	
	Market Share	14%	22%	13%	8%	24%	2%	4%	7%	6%

FOOD SERVICE		Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
May-24	WTP ($/meal)	$27.94	$21.38	$16.42	$19.47	$19.60	$14.63	$19.05	$20.25	
	Market Share	15%	25%	4%	10%	15%	4%	13%	8%	5%
Jun-24	WTP ($/meal)	$27.58	$20.63	$15.89	$18.93	$18.74	$13.30	$18.48	$20.04	
	Market Share	16%	25%	4%	10%	15%	4%	13%	9%	5%

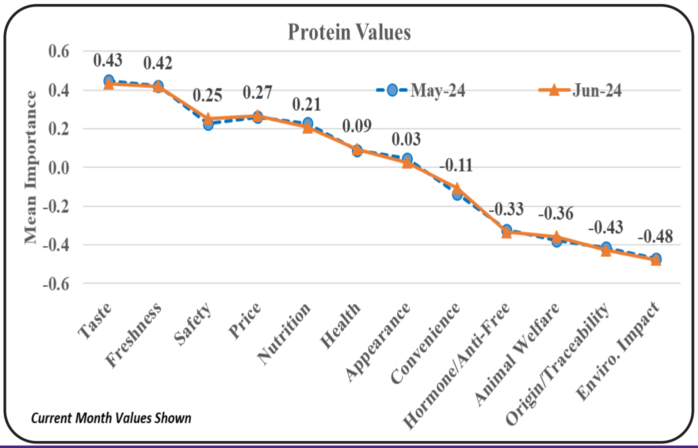
Willingness-to-pay (WTP) increased for six evaluated Retail products (including both beef and pork items) in June compared to May. WTP decreased for all evaluated Food Service dinner meals in June.

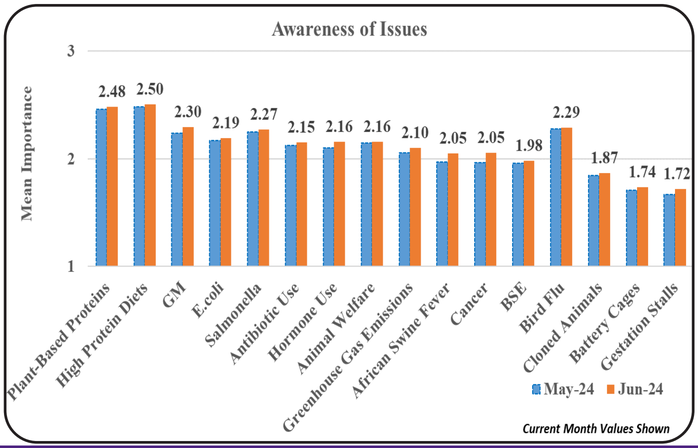
The combined beef and pork projected market shares for June are 36% and 21%, respectively at the grocery store and 41% and 14% at the restaurant.

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 43% 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, High Protein Diets, and Bird Flu remain topics heard or read most about.

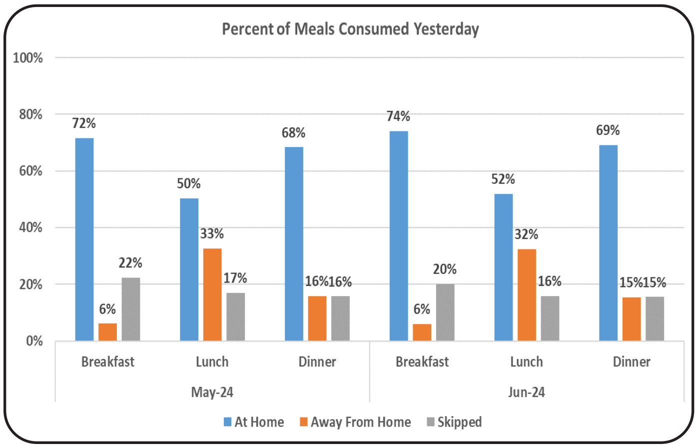


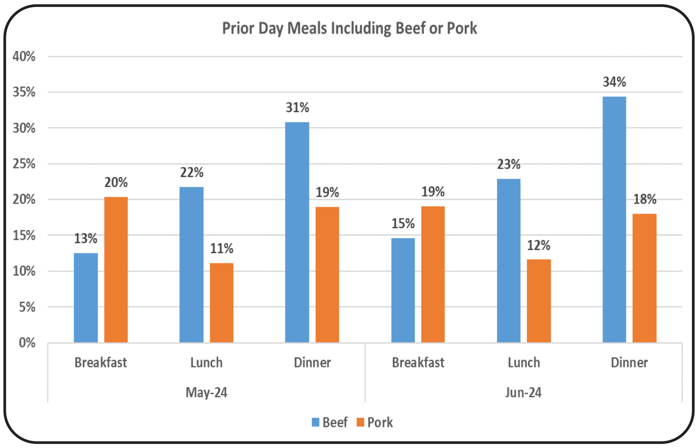


Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 52%, and 69% consumed breakfast, lunch, and dinner at home in June with all three meal rates increasing from May. In June, 15%, 23%, and 34% had beef their prior day breakfast, lunch, and dinner. Pork was included in 19%, 12%, and 18% of these meals.

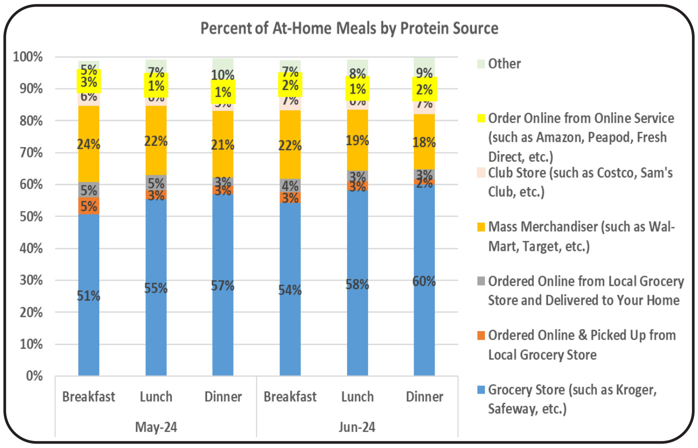


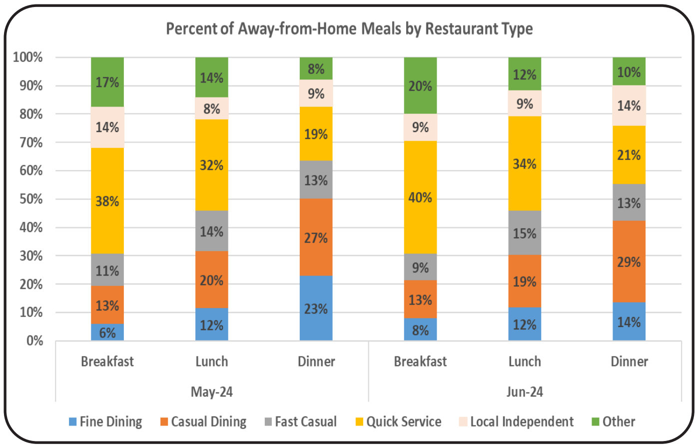


Prior Day Meals: At-Home Protein Source & Restaurant Type

In June, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 29%, 25%, and 24% 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 63%, 68%, and 62% of breakfast, lunch, and dinner meals in June.



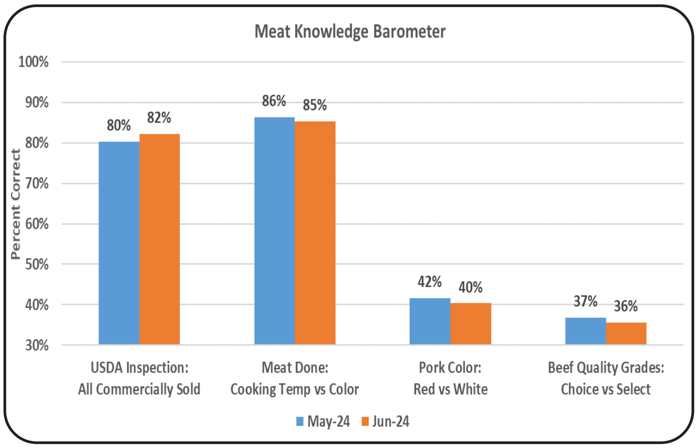


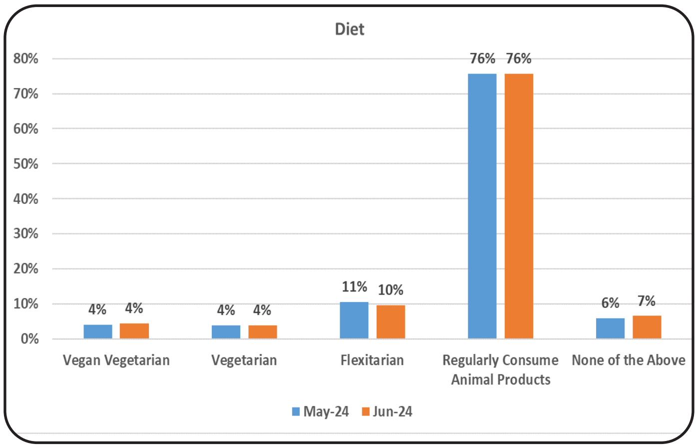
Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

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.

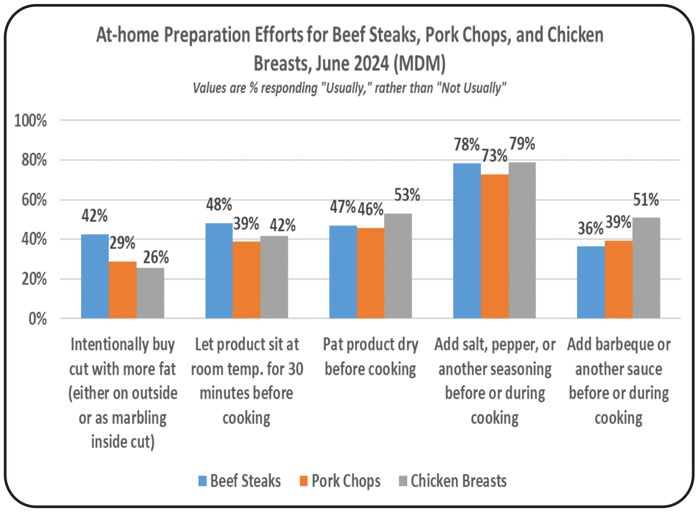
In June, 76% of respondents self-declare as regular consumers of products derived from animal products, 10% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

Being in the heart of summer grilling season, the June survey included questions around at-home preparation efforts to assess similarities and differences for beef steaks, pork chops, and chicken breasts. Adding salt, pepper, or another seasoning is the most common activity (of the five examined here) for all three meat products. Interesting differences across cuts include higher rates of intentionally buying beef steaks with more fat, pork chops being the least likely to let sit at room temperature 30 minutes before cooking, and heavier use of barbeque or another sauce with chicken breasts.



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

The MDM Project is funded in-part by the Beef Checkoff and the Pork Checkoff.

Funded in part by the Beef Checkoff.

Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu