

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

<i>RETAIL</i>	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
May-22 WTP (\$/lb)	\$17.42	\$8.78	\$7.34	\$5.56	\$8.36	\$8.96	\$9.61	\$3.10	
Market Share	8%	25%	14%	7%	26%	3%	4%	7%	7%
Jun-22 WTP (\$/lb)	\$17.19	\$8.52	\$7.09	\$6.10	\$8.29	\$8.98	\$9.16	\$2.93	
Market Share	8%	24%	13%	9%	25%	3%	4%	7%	7%

<i>FOOD SERVICE</i>	Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
May-22 WTP (\$/meal)	\$28.30	\$21.00	\$16.52	\$19.52	\$19.15	\$13.42	\$18.96	\$19.78	
Market Share	16%	24%	5%	10%	15%	4%	13%	8%	5%
Jun-22 WTP (\$/meal)	\$27.11	\$20.63	\$16.38	\$19.26	\$18.89	\$13.55	\$18.33	\$19.58	
Market Share	14%	24%	5%	10%	15%	4%	13%	9%	5%

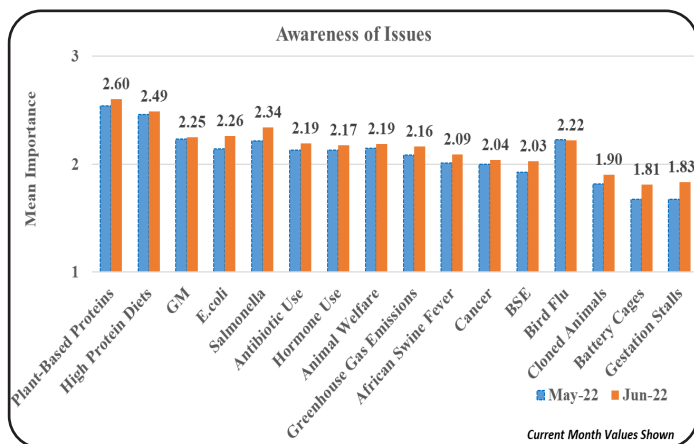
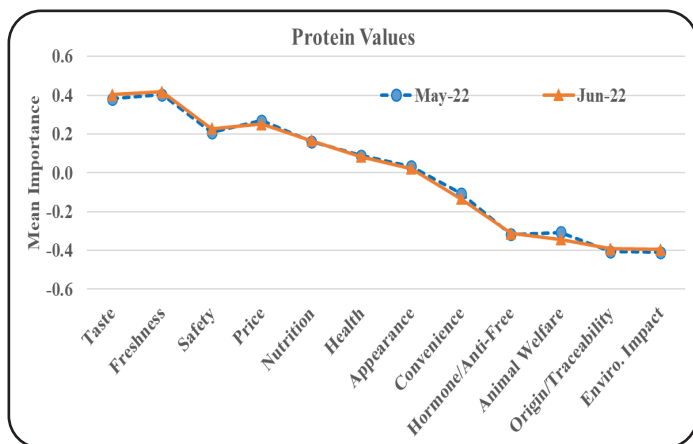
Willingness-to-pay (WTP) decreased for five evaluated Retail products in June compared to May. Meanwhile, WTP decreased for seven evaluated Food Service meals. Combined this broadly confirms weakening consumer demand consistent with increased general discussion around consumers being more conservative in their spending.

The combined beef and pork projected market shares for June are 31% and 22%, respectively at the grocery store and 39% and 15% at the restaurant.

Protein Values & Issues Awareness

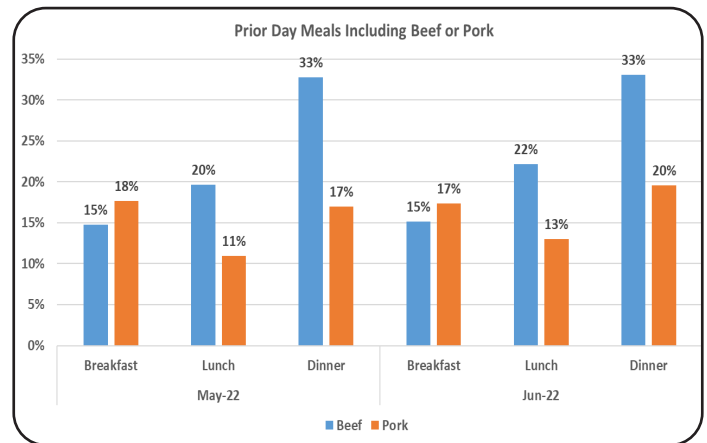
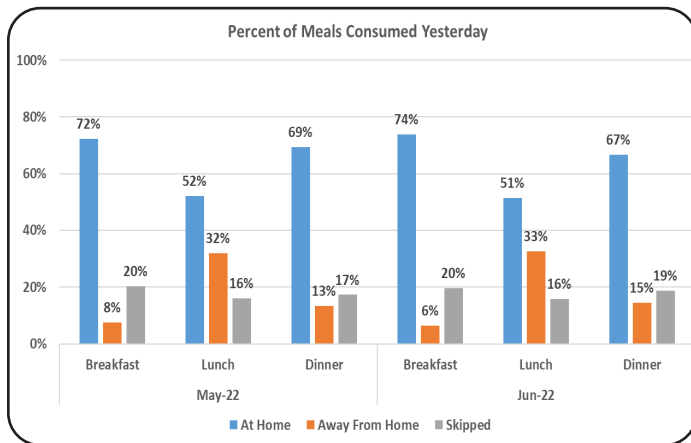
Taste, Freshness, Safety, and Price remain most important when purchasing protein. Animal Welfare decreased most in importance from last month while Taste increased the most.

Plant-based Proteins and High Protein Diets remain topics heard or read most about. Not surprisingly, awareness of Bird Flu topics remains elevated.



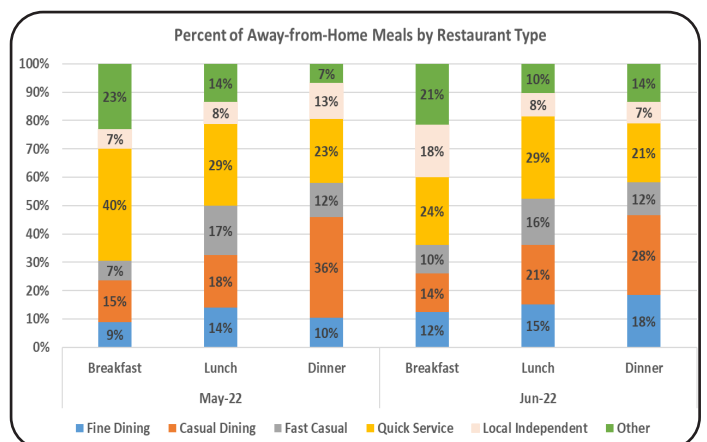
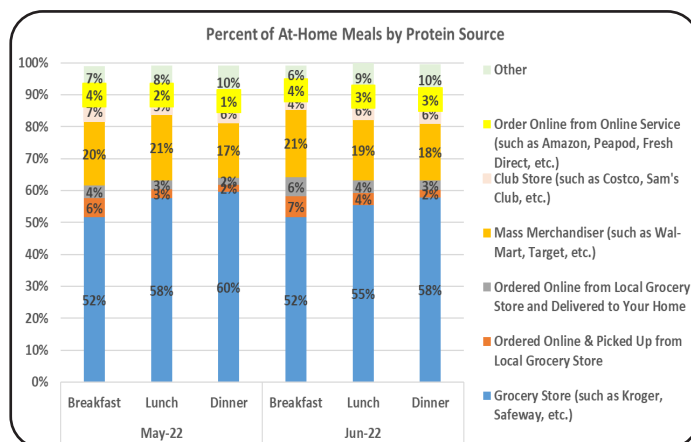
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 74%, 51%, and 67% consumed breakfast, lunch, and dinner at home in June. In June, 15%, 22%, and 33% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 13%, and 20% of these meals.



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

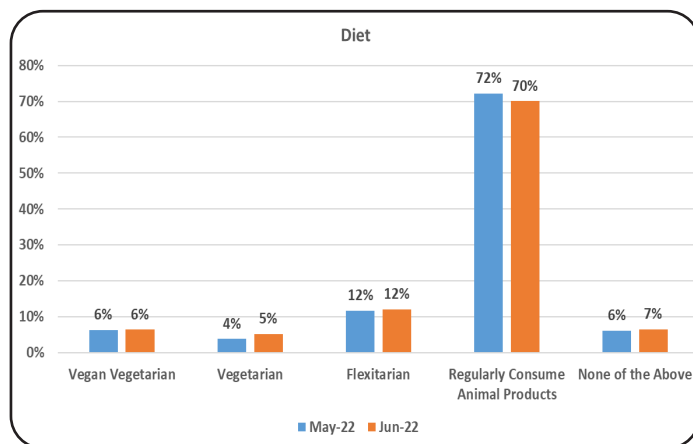
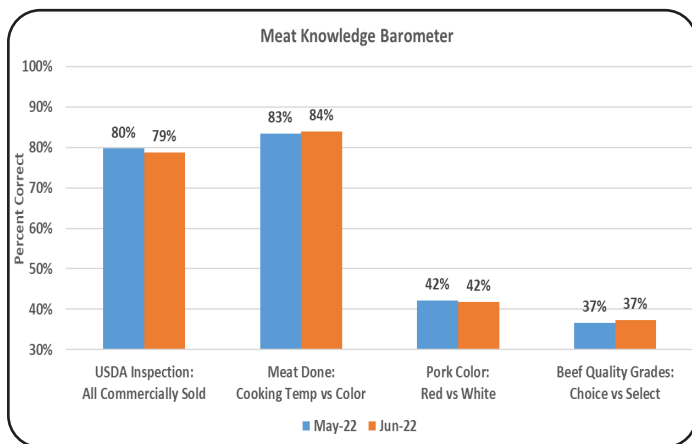
In June, the protein source for at-home meals was predominantly Grocery Stores. Meals consumed away-from-home vary in prevalence. Quick Service holds the largest share for breakfast and lunch while Casual Dining leads for dinner. Combined, Casual Dining, Fast Casual, and Quick Service comprise 48%, 66%, and 61% of breakfast, lunch, and dinner meals in June.



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.

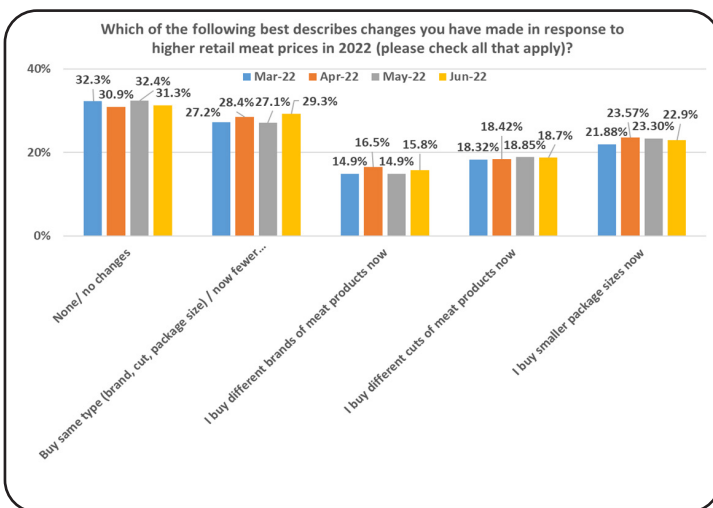
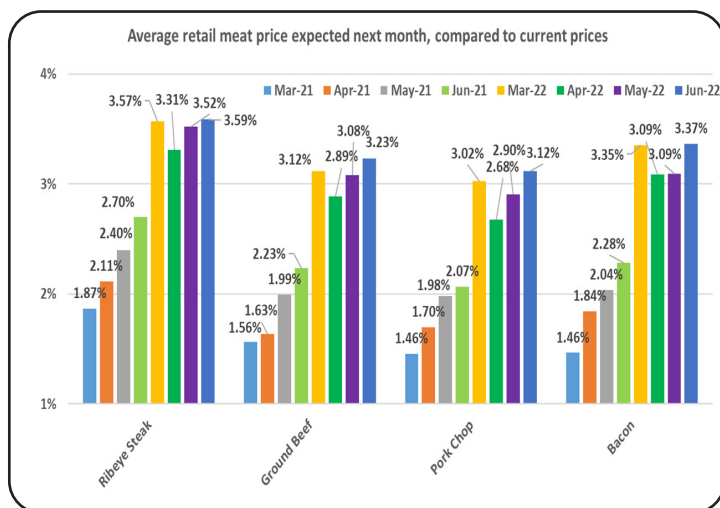
In June, 70% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.



Ad Hoc Questioning

Consumers continue to expect higher retail meat prices next month and these price expectations remain well above one-year ago expectations consistent with ongoing inflation discussions.

Another question was repeated asking how consumers have responded to higher retail meat prices in 2022. The most common response (31%) remains no change being made. Among those indicating changes, the most prevalent noted adjustment remains reducing the volume of items purchased while being steadfast in product type (brand, cut, and package size).



For more information about this publication and others, visit AgManager.info.

K-State Agricultural Economics • 342 Waters Hall, Manhattan, KS 66506-4011 • 785-532-1504

Copyright 2022 AgManager.info, K-State Department of Agricultural Economics

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.**

