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.

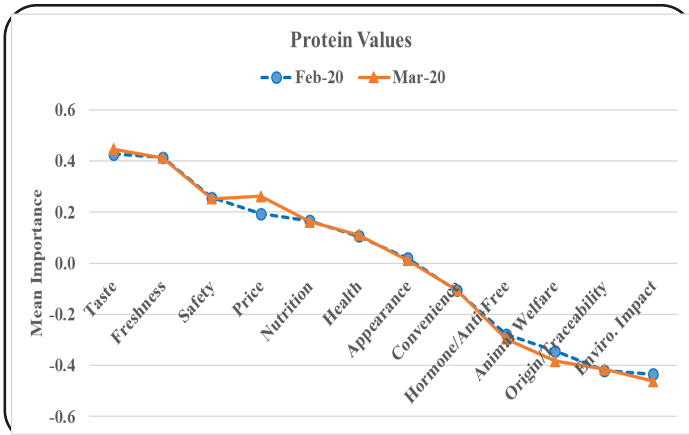
Willingness to Pay & Projected Market Share

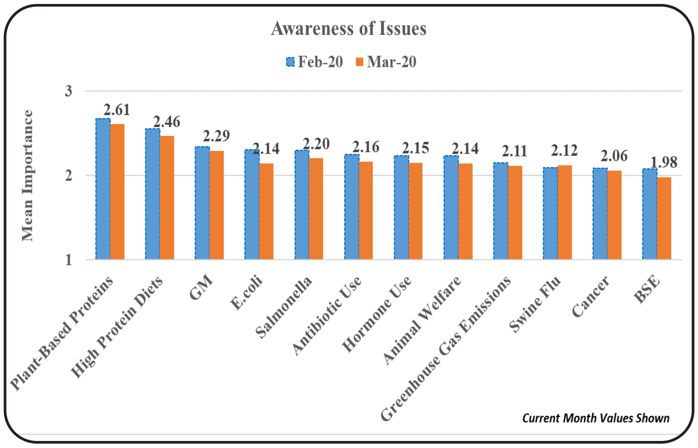
RETAIL		Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Feb-20	*WTP ($/lb)*	$ 16.35	$ 7.18	$ 6.11	$ 4.45	$ 7.43	$ 7.76	$ 8.94	$ 2.08	
	Market Share	7.7%	21.4%	13.2%	6.8%	27.1%	2.5%	5.0%	7.1%	9.3%
Mar-20	*WTP ($/lb)*	$ 15.89	$ 6.90	$ 5.74	$ 4.49	$ 7.13	$ 7.98	$ 8.55	$ 2.12	
	Market Share	6.9%	21.5%	12.6%	7.2%	27.2%	2.7%	4.5%	7.5%	9.9%
FOOD SERVICE		**Ribeye Steak**	**Beef Hamburger**	**Pork Chop**	**Baby Back Ribs**	**Chicken Breast**	**Plant-Based Patty**	**Shrimp**	**Salmon**	**Something Else**
Feb-20	*WTP ($/lb)*	$ 25.79	$ 18.88	$14.92	$ 17.69	$ 17.26	$ 13.31	$ 16.52	$18.08	
	Market Share	14.8%	23.4%	4.8%	10.2%	14.7%	5.1%	11.8%	8.4%	6.9%
Mar-20	*WTP ($/lb)*	$ 24.90	$ 18.39	$14.58	$ 17.53	$ 16.79	$ 12.83	$ 17.38	$17.27	
	Market Share	13.4%	23.9%	4.4%	10.3%	14.5%	4.6%	14.7%	7.3%	6.9%

Willingness-to-pay (WTP) for most items, in both Retail and Food Service declined from February to March. The combined beef and pork projected market shares for March are very similar to February at 28% and 20%, respectively at the grocery store and 37% and 15% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein with Price increasing in importance from last month. Plant-based Proteins, High Protein Diets, and Genetically Modified Foods remained the three topics heard or read about the most.





Prior Day Meal Location & Protein Consumption Frequency

Respondents indicate 72%, 52%, and 70% consumed breakfast, lunch, and dinner at home (vs. away from home) in March with lunch and dinner showing increases from February. Recall these are monthly average values and hence contain both “pre-COVID19” and “during-COVID19” responses. In March, 16%, 21%, and 31% had beef in their prior day breakfast, lunch, and dinner. Pork was included in 18%, 12%, and 21% of these three meals.

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Meat Demand Monitor
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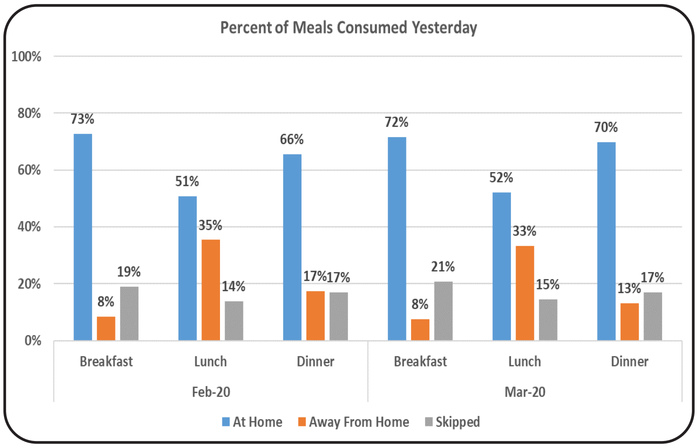
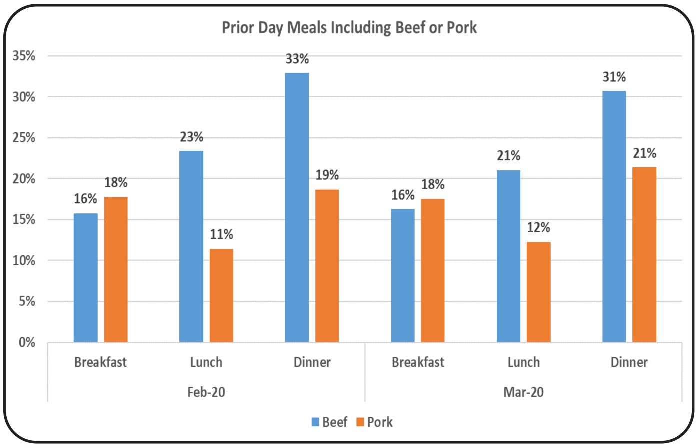
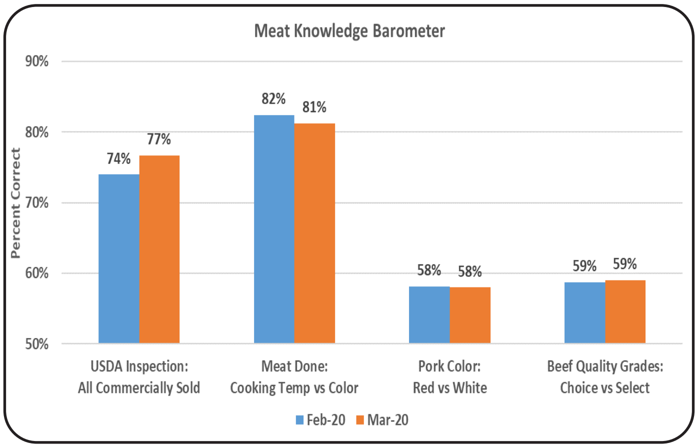
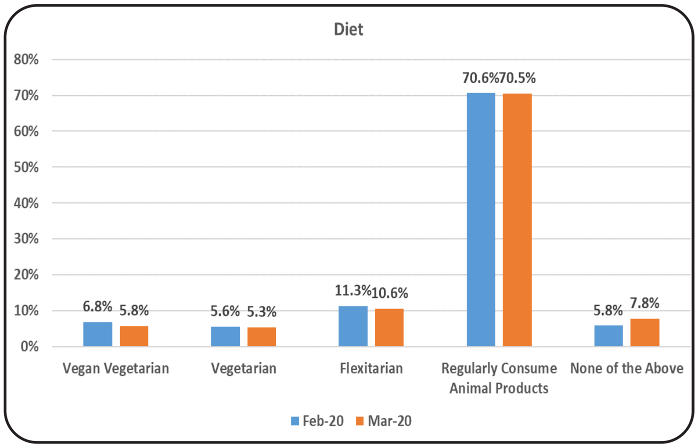




Meat Knowledge & Personal Diet

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.

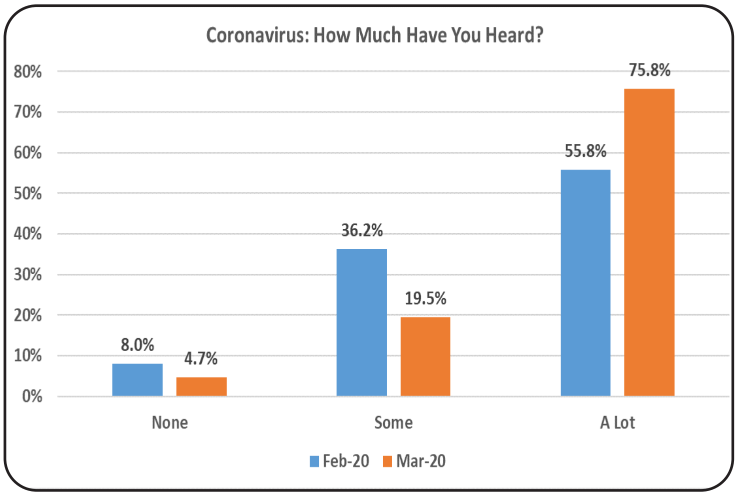




In March, 70.5% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.

Ad Hoc Questioning

This month repeated February questions to assess coronavirus awareness and perceived impact of protein selection. Awareness has increased as expected. In March, 24% of respondents indicated that their selection of protein items to consume impacts their risk of obtaining the coronavirus.



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.

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