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-21 WTP ($/lb)	$15.79	$7.29	$6.02	$5.00	$7.29	$8.89	$8.92	$2.01	
Market Share	6%	22%	13%	8%	26%	4%	5%	7%	9%
Mar-21 WTP ($/lb)	$17.21	$8.05	$6.73	$5.57	$8.19	$8.44	$9.38	$2.55	
Market Share	8%	23%	13%	8%	28%	2%	4%	7%	7%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Feb-21 WTP ($/meal)	$25.28	$18.21	$14.74	$17.63	$16.91	$13.00	$16.78	$18.03	
Market Share	14%	22%	5%	11%	14%	5%	13%	9%	7%
Mar-21 WTP ($/meal)	$25.00	$17.12	$13.12	$16.54	$15.88	$10.79	$16.30	$17.25	
Market Share	16%	22%	4%	10%	14%	4%	14%	8%	8%

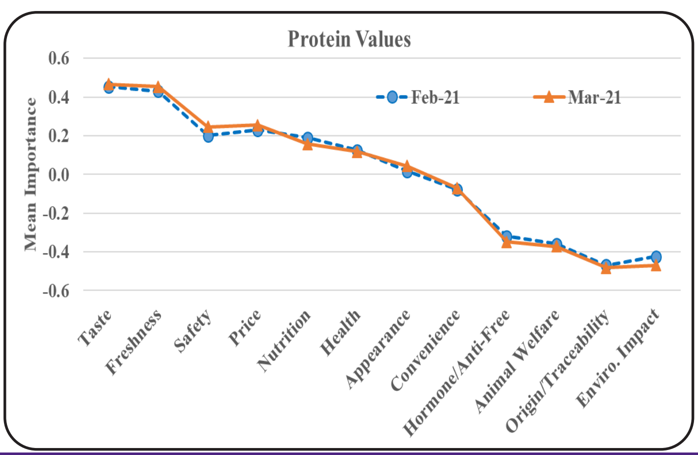
Willingness-to-pay (WTP) increased for seven evaluated products in Retail, including all four beef and pork items, in March compared to February. WTP decreased for all eight evaluated Food Service meals.

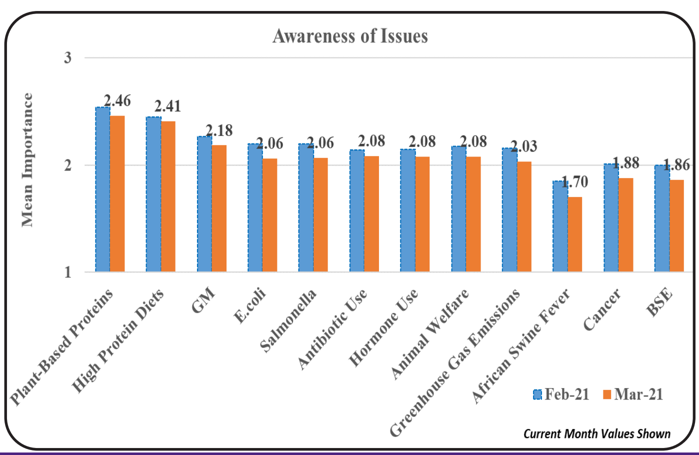
The combined beef and pork projected market shares for March are 31% and 21%, respectively at the grocery store and 38% and 14% at the restaurant.

Protein Values & Issues Awareness

Taste, Freshness, Safety, and Price remain most important when purchasing protein. Safety increased most in importance while Environmntal Impact 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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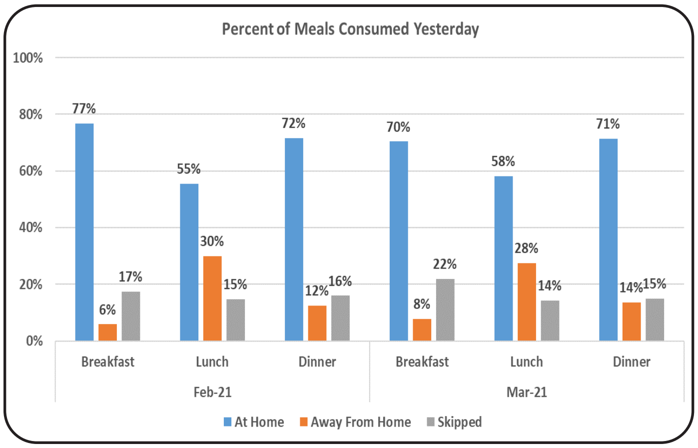
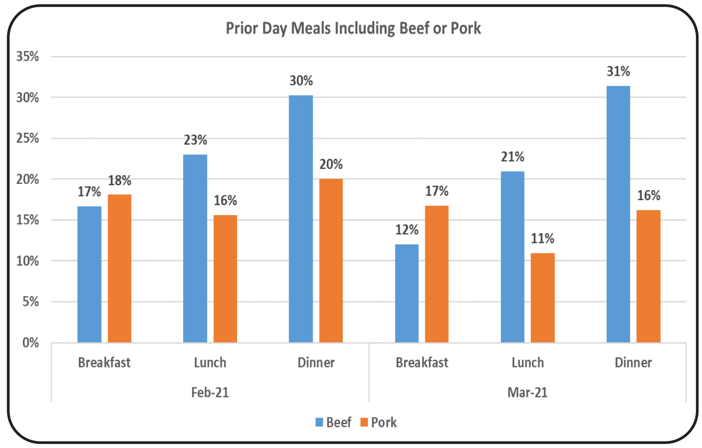
Meat Demand Monitor
Kansas State University Department of Agricultural Economics
Glynn Tonsor, Professor, gtonsor@ksu.edu

Prior Day Meals: Location & Protein Consumption Frequency

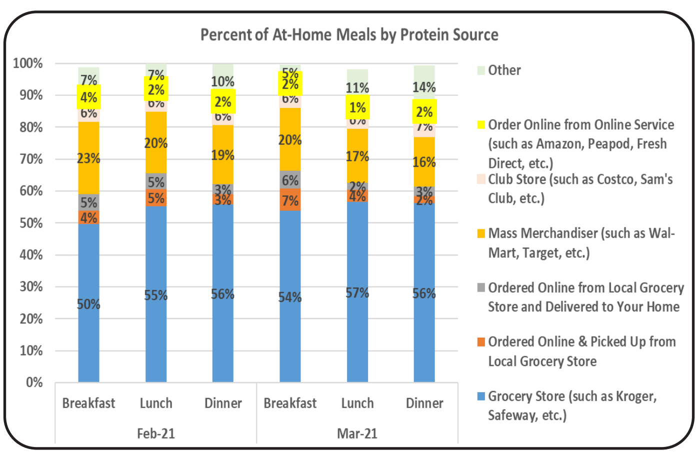
Respondents indicate 70%, 58%, and 71% consumed breakfast, lunch, and dinner at home in March. In March, 12%, 21%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 11%, and 16% of these meals.

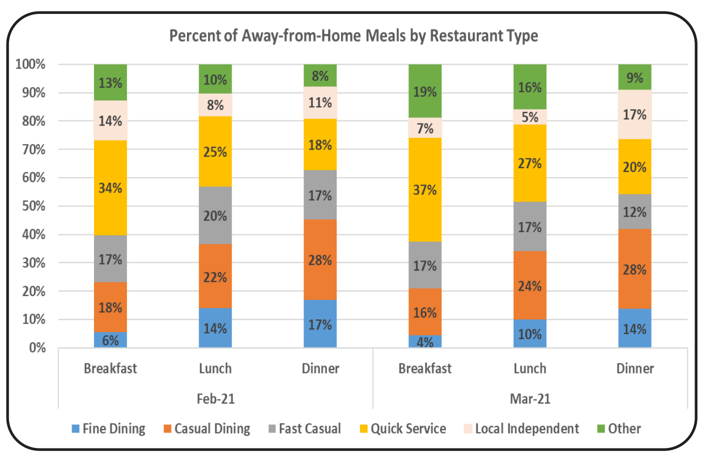




Prior Day Meals: At-Home Protein Source & Restaurant Type

In March, 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 70%, 69%, and 60% of breakfast, lunch, and dinner meals in March.

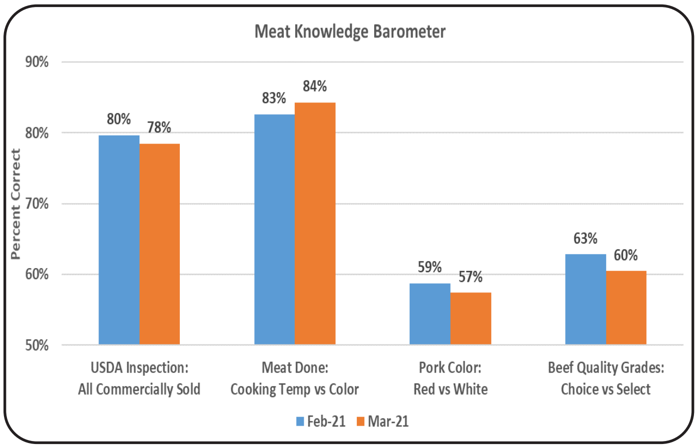


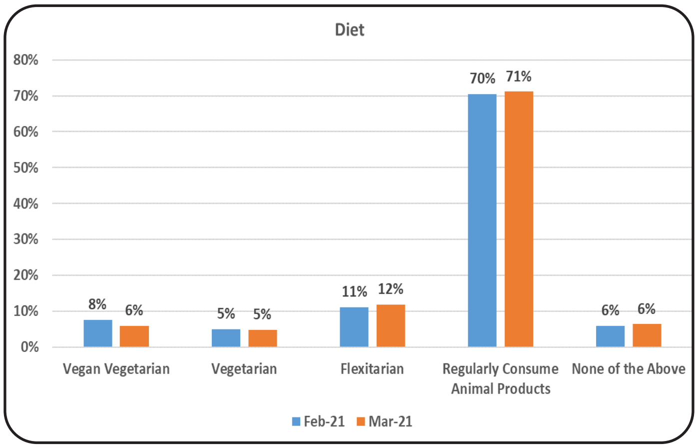


Meat Knowledge & Personal Diet

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.

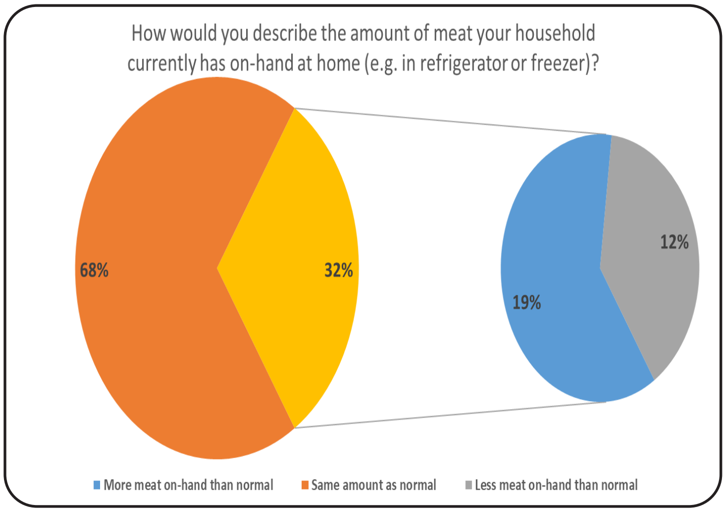
In March, 71% of respondents self-declare as regular consumers of products derived from animal products, 12% indicate they are Flexitarian/Semi-Vegetarian, and a combined 11% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

The March survey included a question previously asked to assess the amount of meat consumers have on-hand at home. In March a minority of 12% indicate having less meat on hand than normal while 19% indicate having more meat on hand than normal. This can be compared with past reports to extend understanding of the pandemic on U.S. consumers.



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