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
Apr-24 WTP ($/lb)	$17.48	$8.77	$7.05	$5.74	$8.57	$7.50	$9.21	$2.97	
Market Share	8%	25%	13%	7%	28%	2%	4%	7%	7%
May-24 WTP ($/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%

FOOD SERVICE	Ribeye Steak	Beef Ham-burger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Apr-24 WTP ($/meal)	$28.28	$21.38	$16.81	$19.83	$19.89	$13.99	$19.50	$21.06	
Market Share	15%	25%	4%	10%	16%	4%	13%	9%	4%
May-24 WTP ($/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%

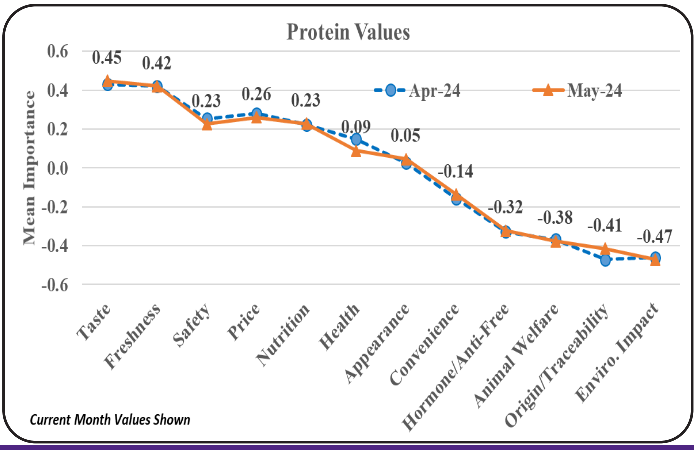
Willingness-to-pay (WTP) increased for five evaluated Retail products (including pork chop and bacon) in May compared to April. WTP decreased for seven evaluated Food Service meals in May.

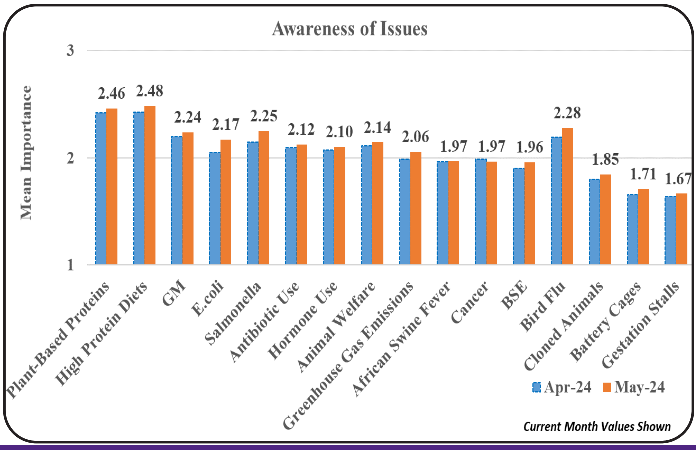
The combined beef and pork projected market shares for May are 32% and 21%, respectively at the grocery store and 40% and 14% at the restaurant.

Protein Values & Issues Awareness

Freshness, Taste, Price, and Safety remain most important when purchasing protein. To guide interpretation, there are 45% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 38% more consider Animal Welfare a bottom-4 factor than consider Animal Welfare a top-4 purchasing factor.

Plant-based Proteins, High Protein Diets, and Bird Flu remain topics heard or read most about.





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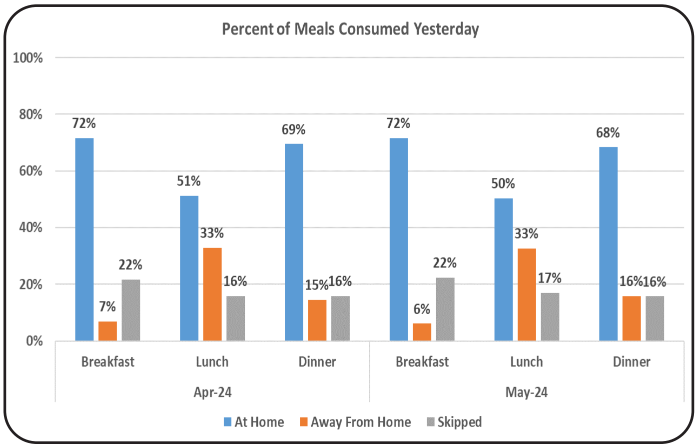
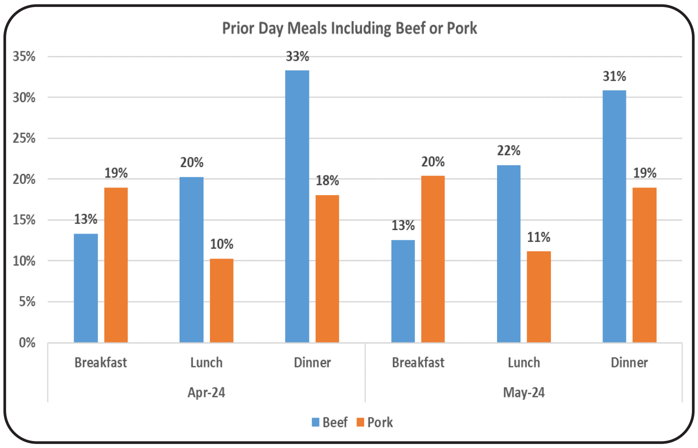
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 72%, 50%, and 68% consumed breakfast, lunch, and dinner at home in May with both lunch and dinner rates decreasing slightly from April. In May, 13%, 22%, and 31% had beef their prior day breakfast, lunch, and dinner. Pork was included in 20%, 11%, and 19% of these meals.

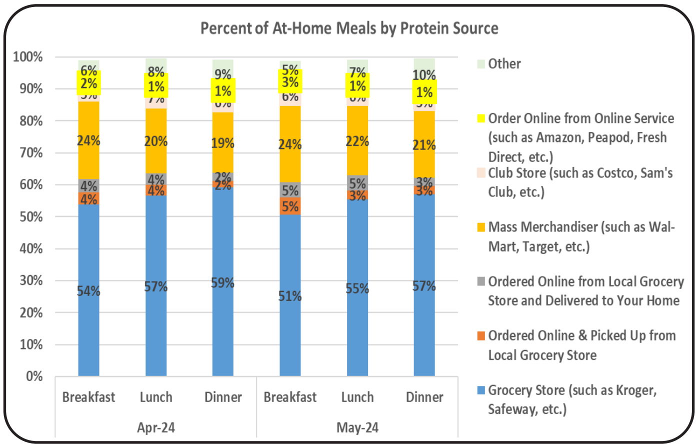


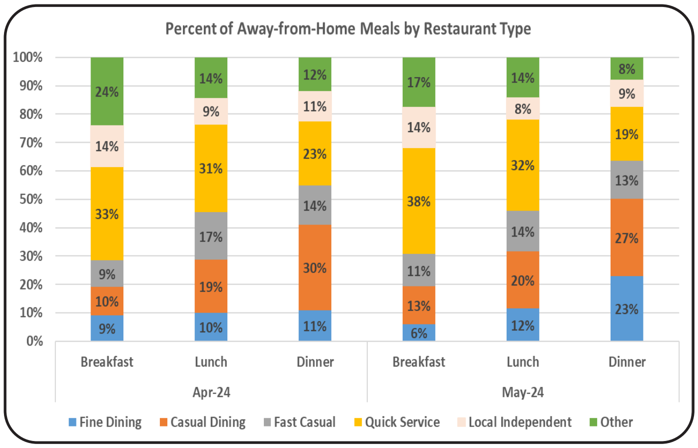


Prior Day Meals: At-Home Protein Source & Restaurant Type

In May, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 30%, 28%, and 27% 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 62%, 67%, and 60% of breakfast, lunch, and dinner meals in May.





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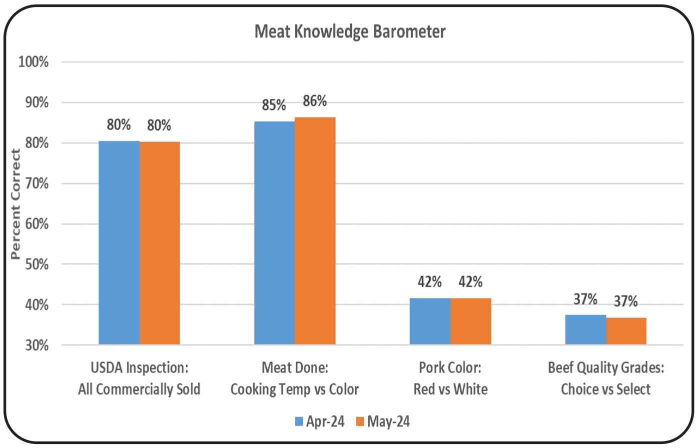
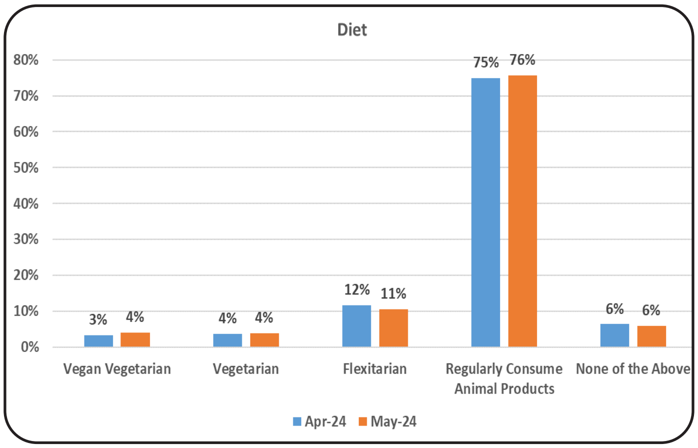
Meat Knowledge & Personal Diet

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.

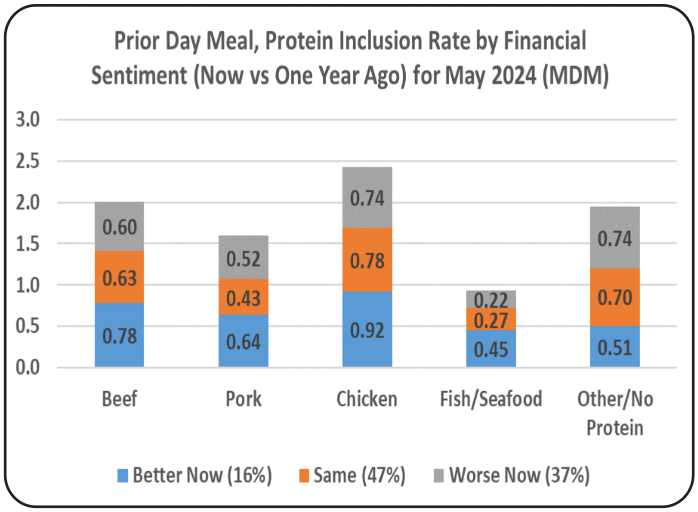
In May, 76% of respondents self-declare as regular consumers of products derived from animal products, 11% indicate they are Flexitarian/Semi-Vegetarian, and a combined 8% indicate they are either Vegan Vegetarian or Vegetarian.





Ad Hoc Questioning

In May 2024, 16% indicate their household finances are better than one year ago. A main impact of varying financial sentiment is prior day meal composition. The minority signaling their finances have improved include beef, pork, chicken, or fish/seafood in prior day meals at much higher rates. Those reporting stable (47%) or declining (37%) finances are more likely to have a different, or no protein in their prior day meals.



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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