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
Oct-24	WTP ($/lb)	$17.68	$8.70	$7.22	$5.58	$8.55	$8.46	$9.56	$2.94	
	Market Share	8%	24%	13%	7%	26%	2%	5%	7%	7%
Nov-24	WTP ($/lb)	$17.29	$8.17	$6.93	$5.97	$8.19	$7.82	$9.28	$2.99	
	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
Oct-24	WTP ($/meal)	$27.42	$20.68	$16.56	$19.24	$18.86	$12.95	$18.43	$19.77	
	Market Share	15%	26%	4%	10%	15%	3%	13%	8%	5%
Nov-24	WTP ($/meal)	$26.65	$20.20	$15.83	$18.50	$18.01	$11.93	$17.90	$18.76	
	Market Share	15%	27%	5%	10%	15%	3%	13%	8%	6%

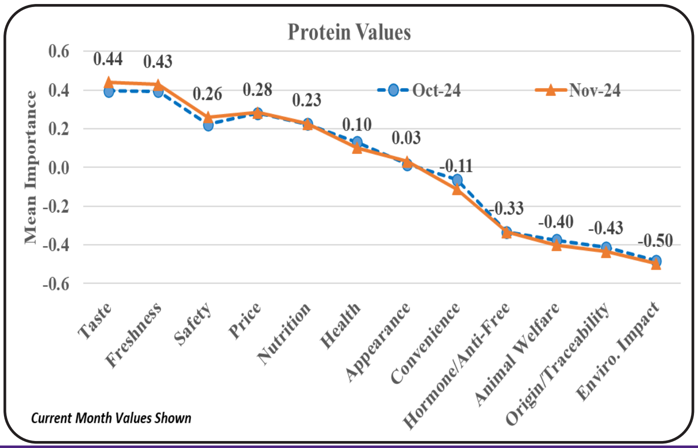
Willingness-to-pay (WTP) decreased for six evaluated Retail products in November compared to October. WTP decreased for all evaluated Food Service dinner meals in November.

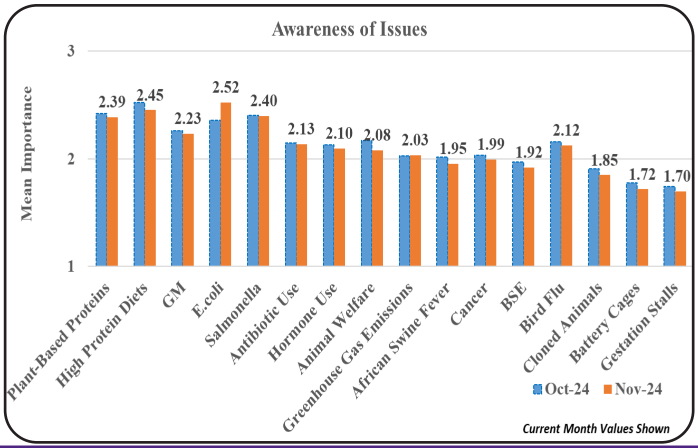
The combined beef and pork projected market shares for November are 31% and 21%, respectively at the grocery store and 41% and 14% at the restaurant.

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 44% more considering Taste a top-4 factor (of 12 examined) than considering Taste a bottom-4 purchasing factor. Similarly, 50% more consider Environmental Impact a bottom-4 factor than consider Environmental Impact a top-4 purchasing factor.

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





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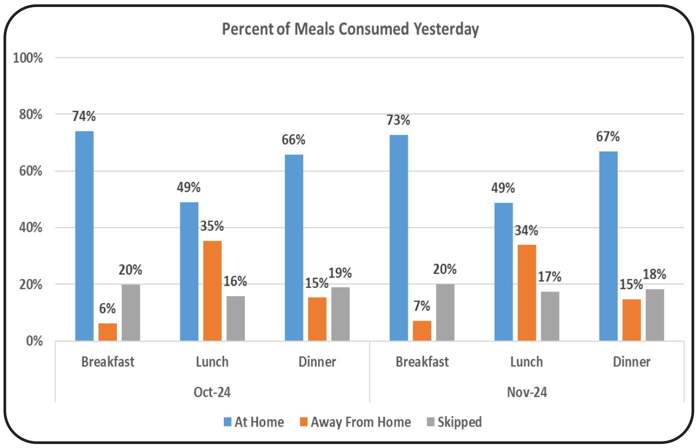
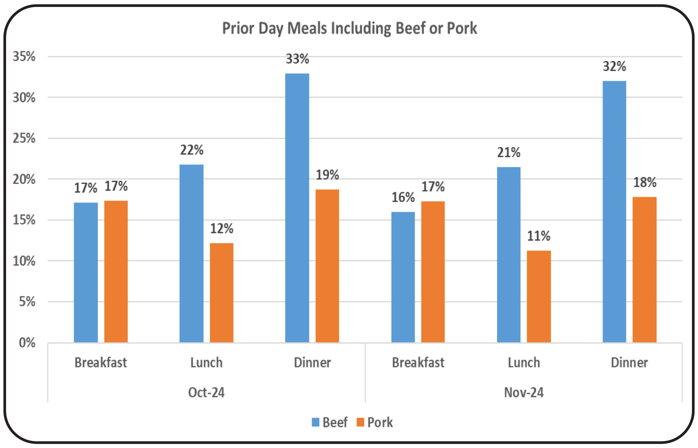
Prior Day Meals: Location & Protein Consumption Frequency

Respondents indicate 73%, 49%, and 67% consumed breakfast, lunch, and dinner at home in November with breakfast being lower and dinner higher than in October. In November, 16%, 21%, and 32% had beef their prior day breakfast, lunch, and dinner. Pork was included in 17%, 11%, and 18% of these meals.

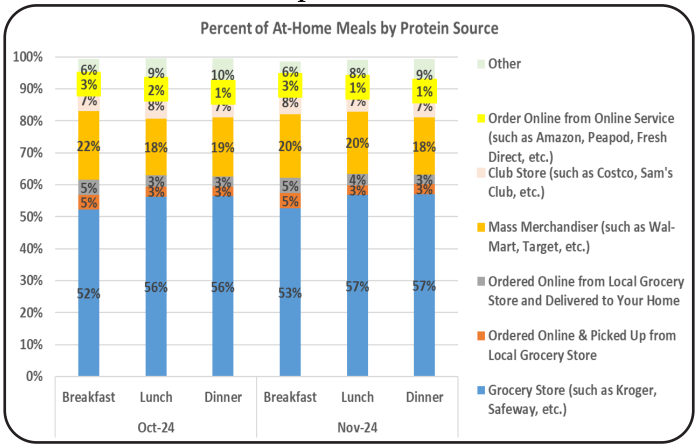


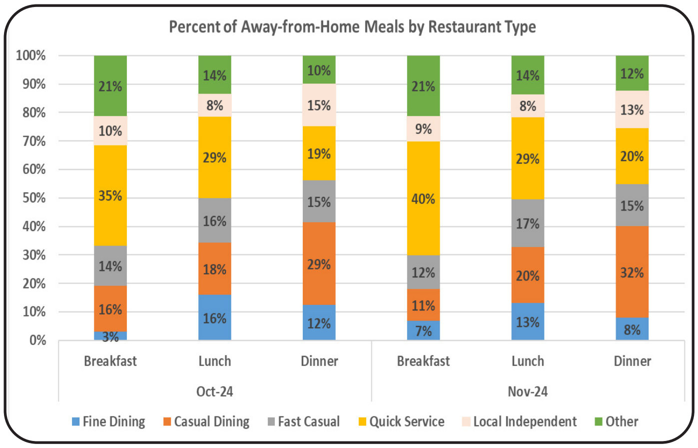


Prior Day Meals: At-Home Protein Source & Restaurant Type

In November, the protein source for at-home meals was predominantly Grocery Stores. Combined, Club Stores and Mass Merchandisers were source for 28%, 26%, and 25% of breakfast, lunch, and dinner meals.

Meals consumed away-from-home vary in prevalence. Quick Service (McDonalds, Subway, Chick-fil-A, etc.) holds the largest share for breakfast and lunch meals while Casual Dining (Applebee's, Olive Garden, Outback, etc.) led for dinner. Combined, Casual Dining, Fast Casual (Panera, Chipotle, Panda Express, etc.), and Quick Service comprise 63%, 66%, and 67% of breakfast, lunch, and dinner meals in November.





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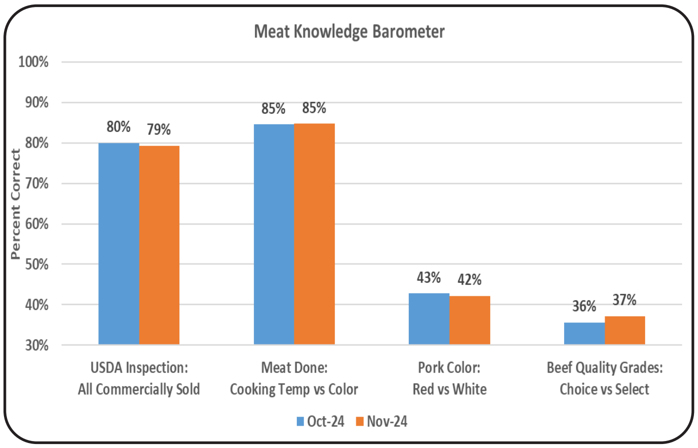
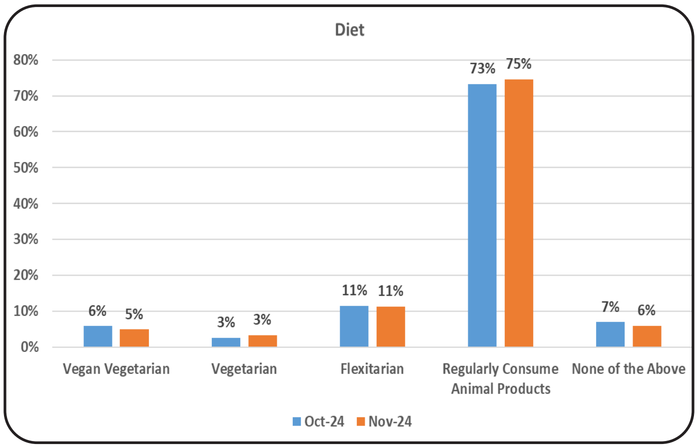
Meat Knowledge & Personal Diet

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 November, 75% 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.

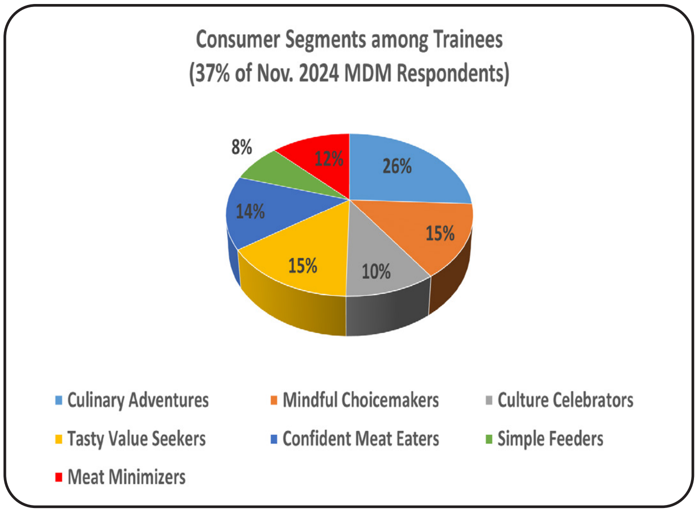


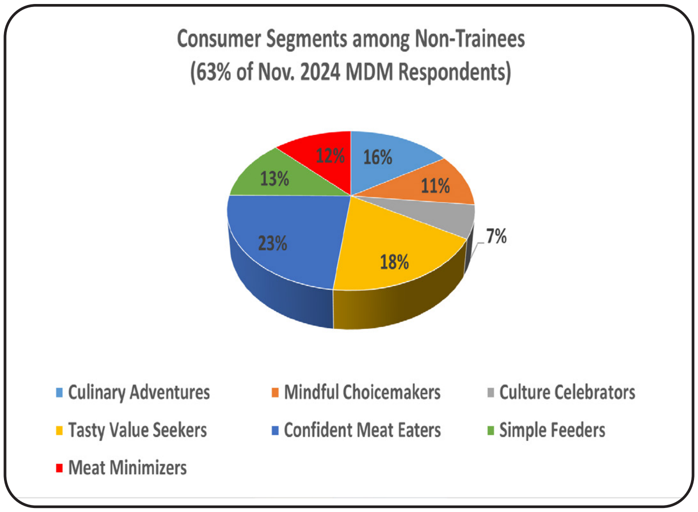


Ad Hoc Questioning

In November, 37% indicate they "intentionally eat protein to aid in meeting strength-training or other fitness-related goals." Published research with Justin Bina notes very different meat demand (i.e. "trainees" are less price sensitive). The two figures below proceed to show how this also aligns with broader segmentation of the U.S. public as discussed in depth within the latest MDM special report (Nov. 19, 2024 posting to AgManager.info).

Trainees (37%) are more likely to be Culinary Adventures, Mindful Choicemakers, or Culture Celebrators while non-trainees (63%) are more likely to be Tasty Value Seekers, Confident Meat Eaters, or Simple Feeders.





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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