

# National Pork Board Building Pork Demand

---

May 22, 2025



# Speakers

---



**Jesse Heimer**

Board of Directors  
National Pork Board



**Kiersten Hafer**

Vice President  
Business Intelligence  
National Pork Board



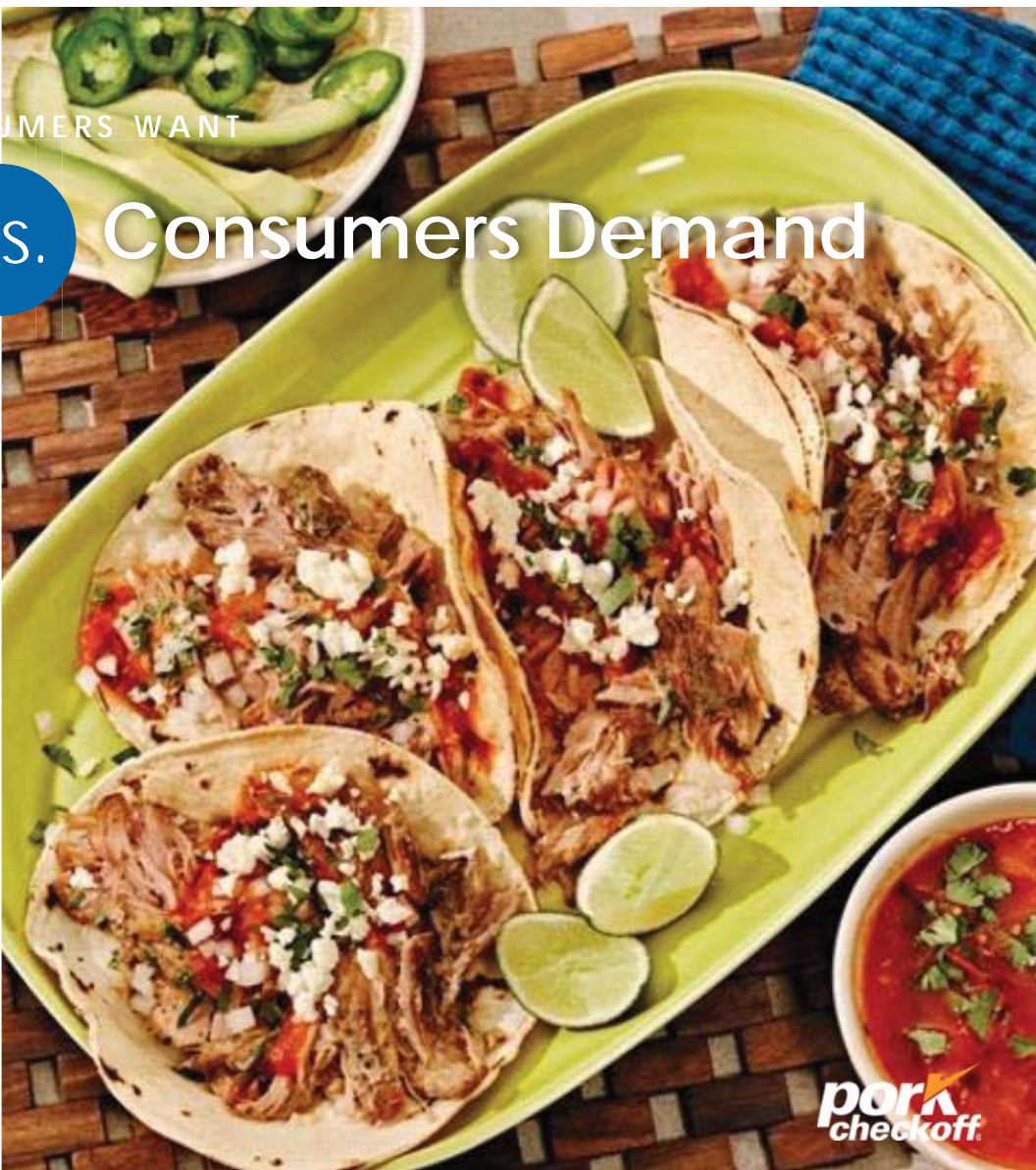
**Glynn T. Tonsor**

Professor  
Dept. of Agricultural Economics  
Kansas State University



WHAT CONSUMERS WANT

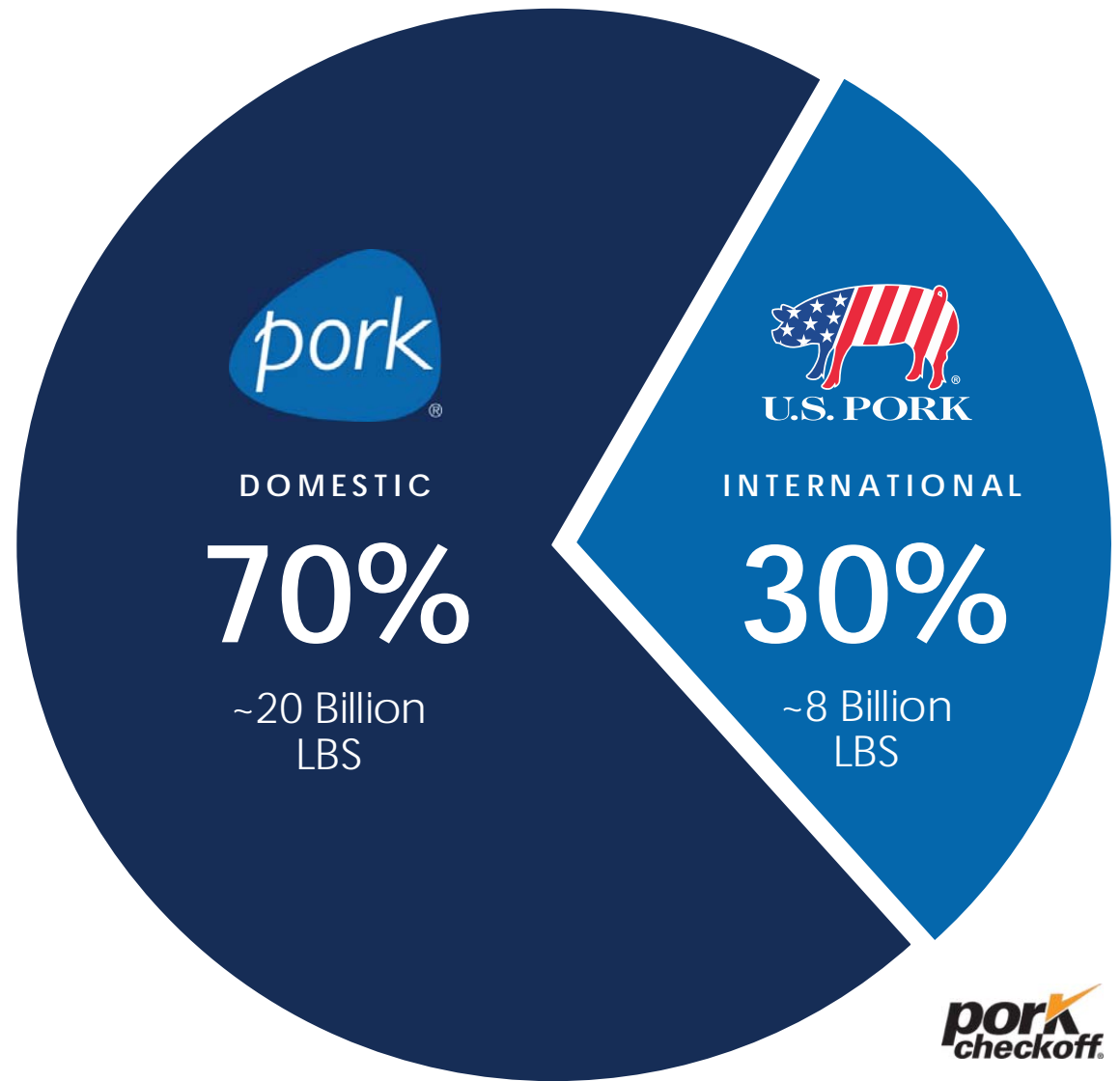
# Consumer Demand vs. Consumers Demand



**pork**  
checkoff

# Total Global Production Landscape

---



Source: [USDA Foreign Agricultural Service](#)



A photograph of two men in blue work shirts standing in a large, modern pig farm. They are looking at a pig in a metal cage. The farm has many rows of cages and large red water dispensers hanging from the ceiling. The lighting is bright, and the overall atmosphere is professional and clean.

Producers  
demand  
a focus on  
**DEMAND.**

**pork**  
checkoff.





U.S. CONSUMERS

Then vs. Now

pork  
checkoff

# The Question How Do We?

---

## CATEGORY

Change consumer perceptions of pork?

## CONSUMER

Reach the right consumers with the right content with the right message?

## PRODUCT

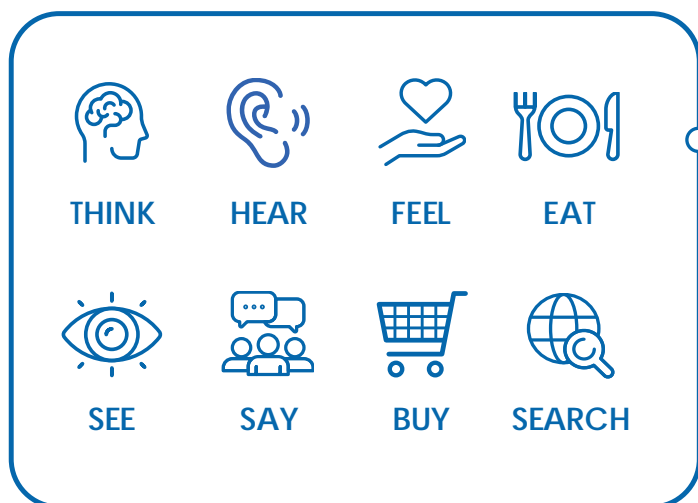
Replace, stabilize and unlock growth?

## CONSUMPTION

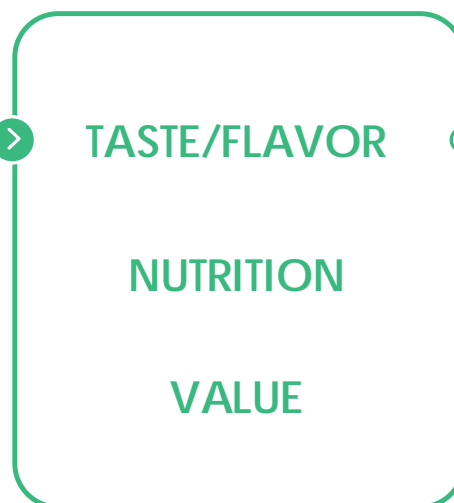
Move more pork to everyday items?

# Know the Consumer

Determine What Consumers \_\_\_\_\_



To Understand  
What Matters Most



Develop Actionable Insights  
to Build Trust & Add Value





# Path to Increasing Pork's Relevance?

---

## POSITION PORK

### Started with the consumer

- Asked them
- Listened to them
- Meet them
- Monitor

## SELL MORE PORK

### Identified the path to growth

- Risk assessment
- Consumer value at stake
- Segmentation

## INCREASE THE VALUE OF PORK

### Blueprint for success

- Consumer strategy
- Brand strategy
- Marketing strategy

# We Learned

---

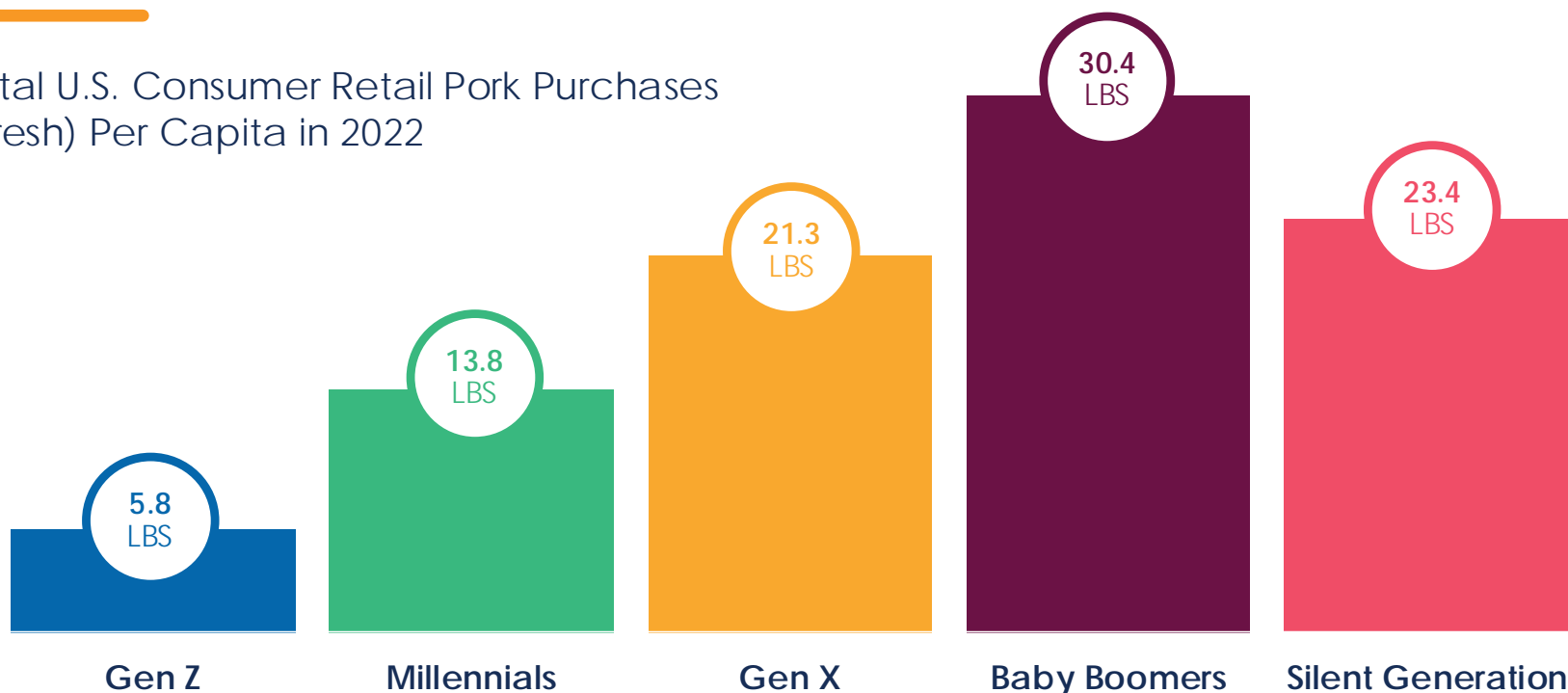






# Younger Americans Eat Pork Less Frequently

Total U.S. Consumer Retail Pork Purchases  
(Fresh) Per Capita in 2022



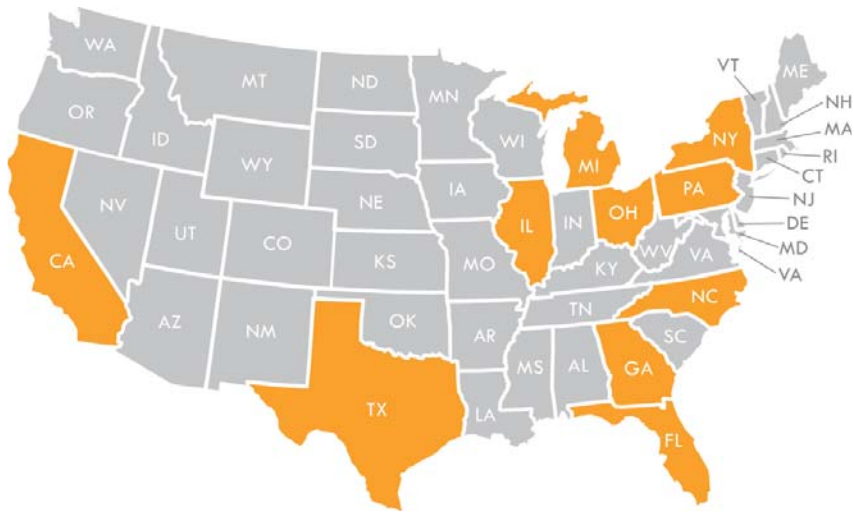
Source: NPB Checkoff-Funded Proprietary Research, Circana, Point of Sale Data, 2023.



NPB CONSUMER CONNECT

# Consumers are Diverse and in Charge

**10 States** Account for **50%** of the U.S. Population and Fresh Pork Consumption



Source: U.S. Census (3-year population trend by region), Circana (3-year trend of pork consumption [lbs])



**pork**  
checkoff®



## Want & Need?

---

Consumers to eat  
more pork, more often



# Seven Consumer Segments



*I've Got This!*

**Confident Meat Eaters**

20.2% of Meatcase Sales



*Stretch My Dollars*

**Tasty Value Seekers**

17.6% of Meatcase Sales



*Up for the Challenge*

**Culinary Adventurers**

16.9% of Meatcase Sales



*I Make Conscious Choices*

**Mindful Choicemakers**

15.4% of Meatcase Sales



*Just Get Me Through This Meal*

**Simple Feeders**

11.2% of Meatcase Sales



*What's the Alternative?*

**Meat Minimizers**

10.2% of Meatcase Sales



*Connections Matter Most*

**Culture Celebrators**

8.5% of Meatcase Sales

★ Audience Priorities for the 2025 Campaign

# 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.

Mar-Sept 2024 MDM%	19%	12%	7%	18%	21%	9%	13%
NPB 2023 Seg Study %	16%	14%	8%	18%	20%	12%	11%
NPB Segment Name	CULINARY ADVENTURERS	MINDFUL CHOICEMAKERS	CULTURAL CELEBRATORS	TASTY VALUE SEEKERS	CONFIDENT MEAT EATERS	SIMPLE FEEDERS	MEAT MINIMIZERS

<https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data>



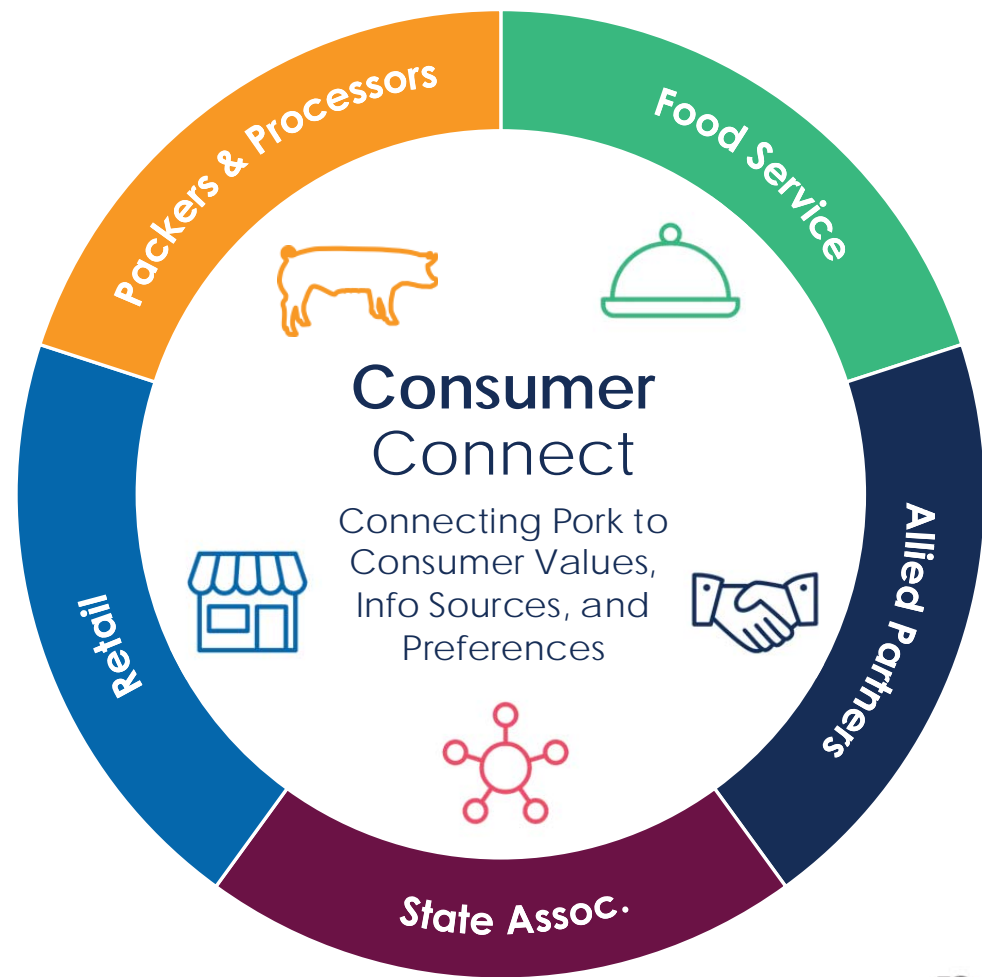
# MDM: Meat Demand Monitor

RETAIL DEMAND MEASURE	NATIONAL AVERAGE (\$/lb)	CULINARY ADVENTURERS	MINDFUL CHOICEMAKERS	CULTURAL CELEBRATORS	TASTY VALUE SEEKERS	CONFIDENT MEAT EATERS	SIMPLE FEEDERS	MEAT MINIMIZERS
Ribeye Steak	\$17.63	119	114	110	88	95	91	95
Ground Beef	\$8.74	126	130	118	80	89	95	92
Pork Chop	\$7.19	131	133	119	81	96	84	75
Bacon	\$5.94	125	123	118	82	102	97	64
Chicken Breast	\$8.56	121	148	122	82	84	87	105
Plant-Based Patty	\$8.29	112	136	112	79	87	87	98
Shrimp	\$9.47	119	133	114	91	91	84	88
Beans and Rice	\$3.27	134	161	139	70	68	75	132



# Meeting Consumers Where They Are

---



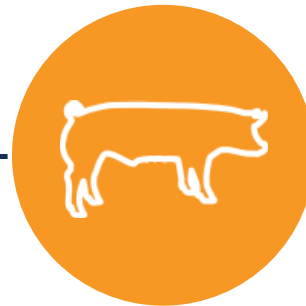
# Marketing Advisory Group



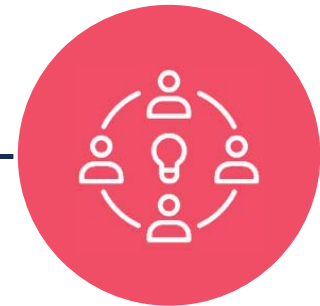
States



Packers



Producers



Board Members

# Once-in-a- Generation Crossroads

---

## CATEGORY



First in the world. Third in the U.S.

## CONSUMER



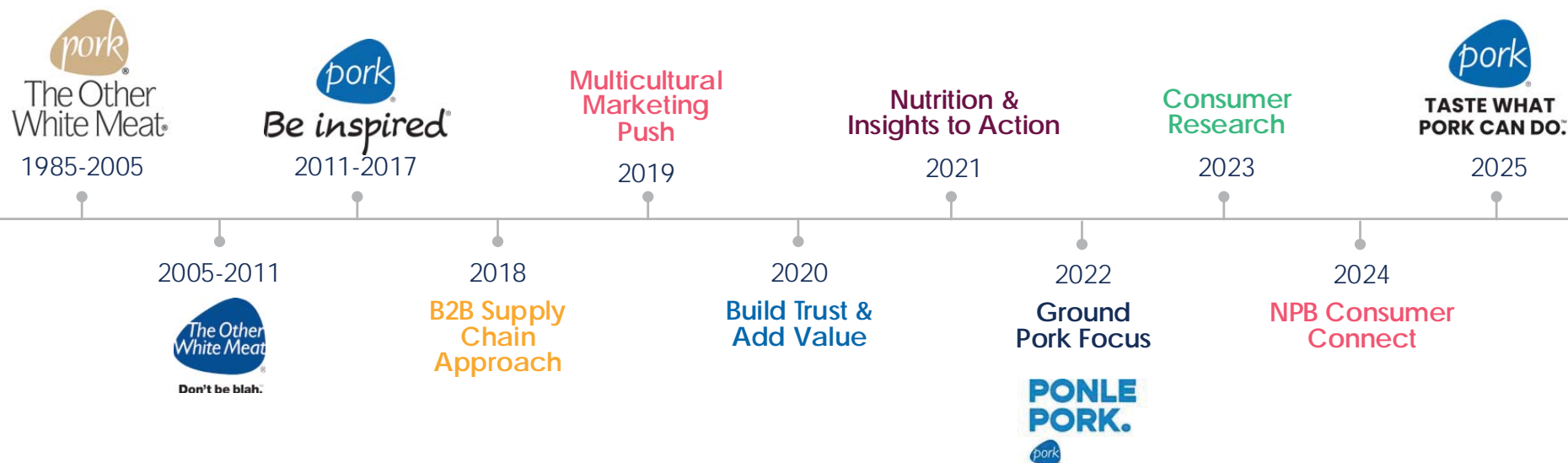
Gen Z & Millennials crave taste and flavor, balance, convenience and versatility.

## PRODUCT



Pork is seen as “occasion only” or value-based meat.

# Domestic Demand Journey





# What's Different This Time?

---



Unapologetic About Pork



"Whole Hog" Approach —  
Fresh and Processed



We're Not the "**Other**" Anything

# What's Different This Time?

---



Data in Our **Control**



Metrics That Guide  
Decisions for **Success**



Industry Is **Supportive**

# Building a Relevant Brand

Vision &  
Ambition

No. 1 in flavor. No. 2 overall.

Expand from "special day" to every day.

Emotional  
Connection

Enjoyment and the ability to unite through pork.

What We  
Stand For

Authentic flavor, unapologetic enjoyment, self-expression and creativity, making memories, and responsibility and care.

Brand  
Promise

Pork brings flavorful moments to your everyday life.





Weekend +  
Holiday Treat

MORE

Then & Now



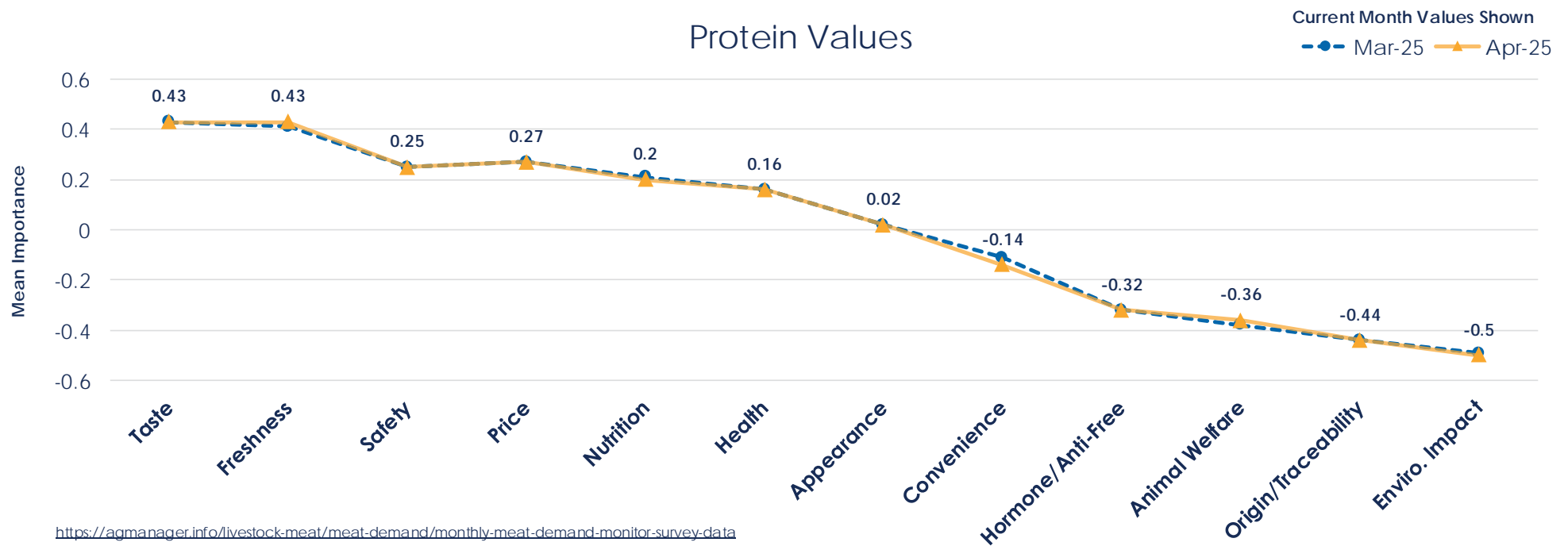
Everyday  
Flavor Fix

**pork**  
checkoff.





# Taste Leads, Indeed!









# Flavor-Filled Moments

Turn pork dishes into a flavor fest that starts in their feed and keeps going into the kitchen.



**pork** TASTE WHAT PORK CAN DO.



# GINGER PORK NOODLE BOWL

SWEET **SPICY** SAVORY



## BALSAMIC GLAZED PORK TENDERLOIN

**EASY**

Preheat at 350°F. Marinate pork tenderloin in balsamic vinegar bake until the internal temperature of the tenderloin has reached a minimum of 145°F, followed by a 3 minute rest.



**TASTE WHAT  
PORK CAN DO.**

# Measuring Success

Showcasing **high-flavor** pork products.

**Attracting new consumers** to high-value pork products.

Creating pork dishes that **customers want**  
and developing products **consumers need**.

Measuring the investment: ROI

QUESTION

---

Does building pork demand  
matter to hog producers?



# Research Says Yes

“Production Dynamics and Disruption Responses in the Pork Supply Chain,”  
Butcher and Schulz, Iowa State University:

+1% increase in wholesale pork demand  
= **+0.7%** increase in market hog price

+1% increase in expected market hog price  
= **+1.9%** increase in feeder pig price

+1% increase in expected market hog price  
= **+1.2%** increase in early weaned pig \$

<https://www.econ.iastate.edu/files/inline-files/Feeder%20Pigs%20-%20Butcher%20%26%20Schulz.pdf>



# Research Says Yes

---

"Production Dynamics and Disruption Responses in the Pork Supply Chain,"  
Butcher and Schulz, Iowa State University:

If 2023 wholesale pork demand stayed at higher 2022 levels  
(8% difference), producers would have seen:

+4% market hog prices

+4% feeder pig prices

+5% early weaned pig prices

<https://www.econ.iastate.edu/files/inline-files/Feeder%20Pigs%20-%20Butcher%20%26%20Schulz.pdf>



MY POV

---

Derived demand market  
signals are now **quantified,**  
**substantial, & warrant MUCH**  
**wider appreciation**



If you build it, they will come



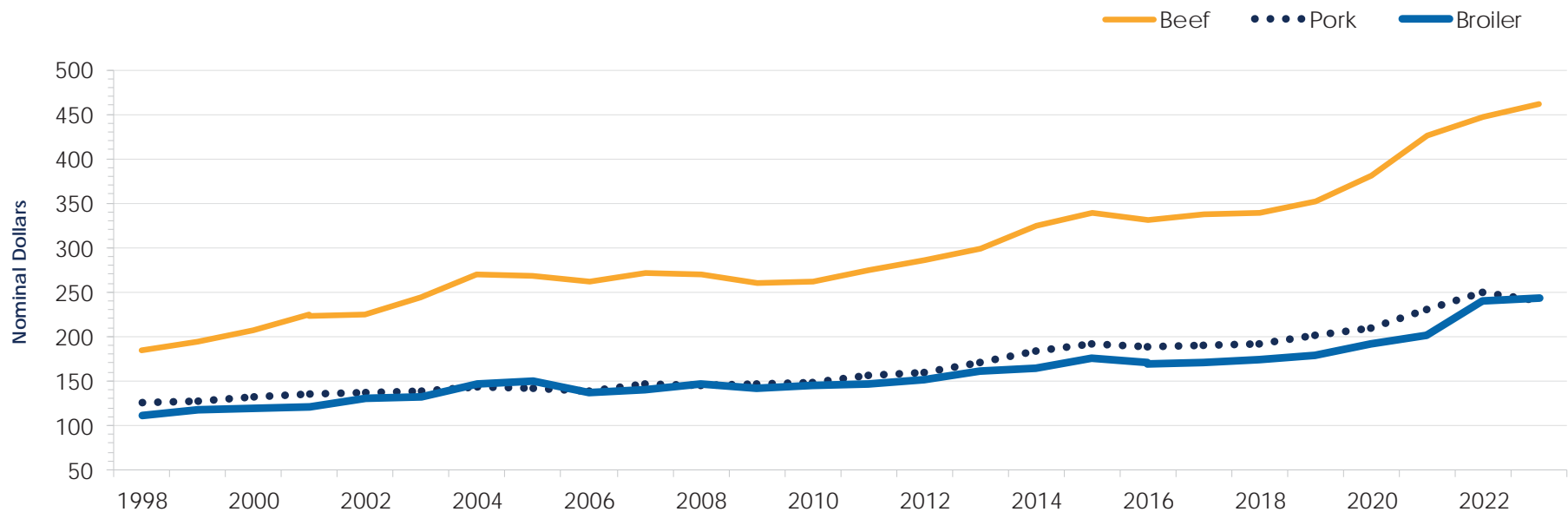
Photo courtesy of kutv.com



**KANSAS STATE**  
UNIVERSITY | Agricultural Economics

# US Expenditures for Meat & Poultry

Per Capita, By Type of Meat, Annual



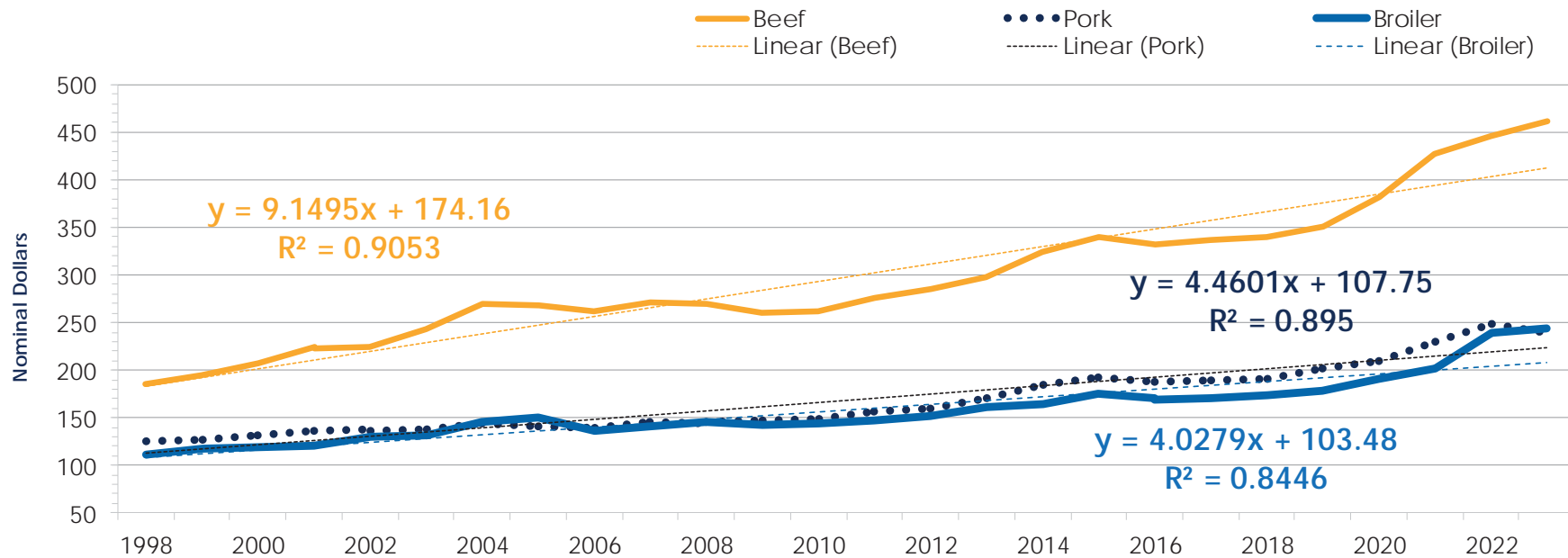
Data Source: Bureau of Economic Analysis & USDA-ERS, Compiled by LMIC  
Livestock Marketing Information Center

M-C-16B  
1/29/25



# US Expenditures for Meat & Poultry

Per Capita, By Type of Meat, Annual



Data Source: Bureau of Economic Analysis & USDA-ERS, Compiled by LMIC  
Livestock Marketing Information Center

M-C-16B  
1/29/25

# Price Sensitivity

---

- Pork purchases are 4-6 times as sensitive to pork prices as beef or chicken, median estimates suggest
- Beef and chicken retail prices have less impact than pork's own-price

While cross-price effects matter, **own-sector impacts remain more important**

[https://agmanager.info/sites/default/files/pdf/TonsorLusk\\_PriceSensitivity\\_2024-Report\\_03-07-24.pdf](https://agmanager.info/sites/default/files/pdf/TonsorLusk_PriceSensitivity_2024-Report_03-07-24.pdf)

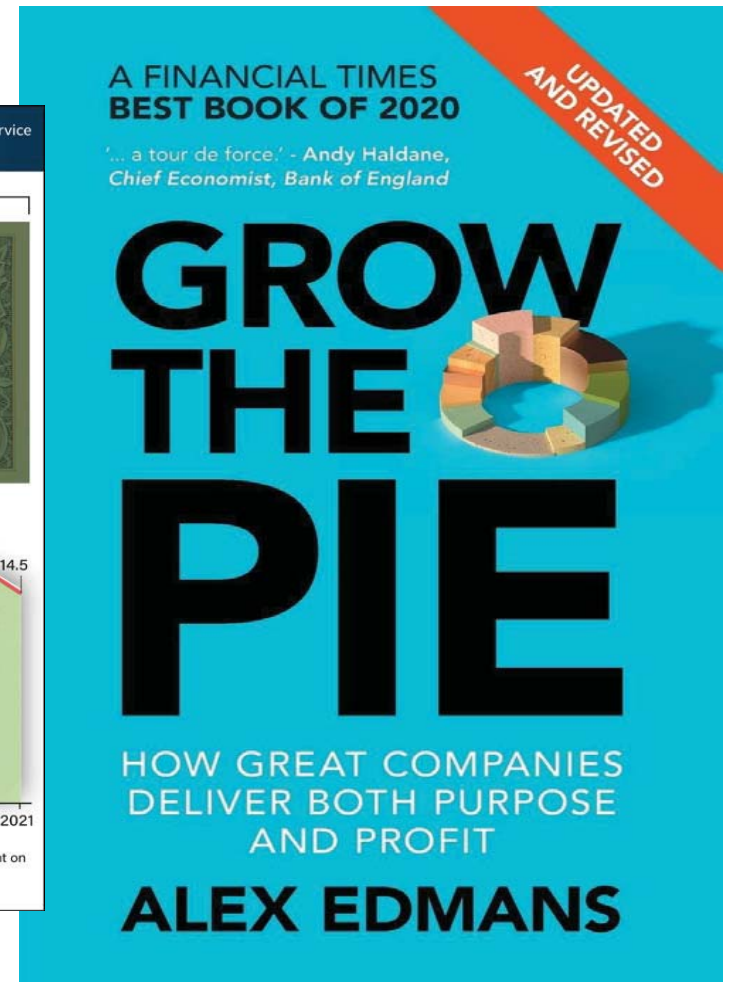
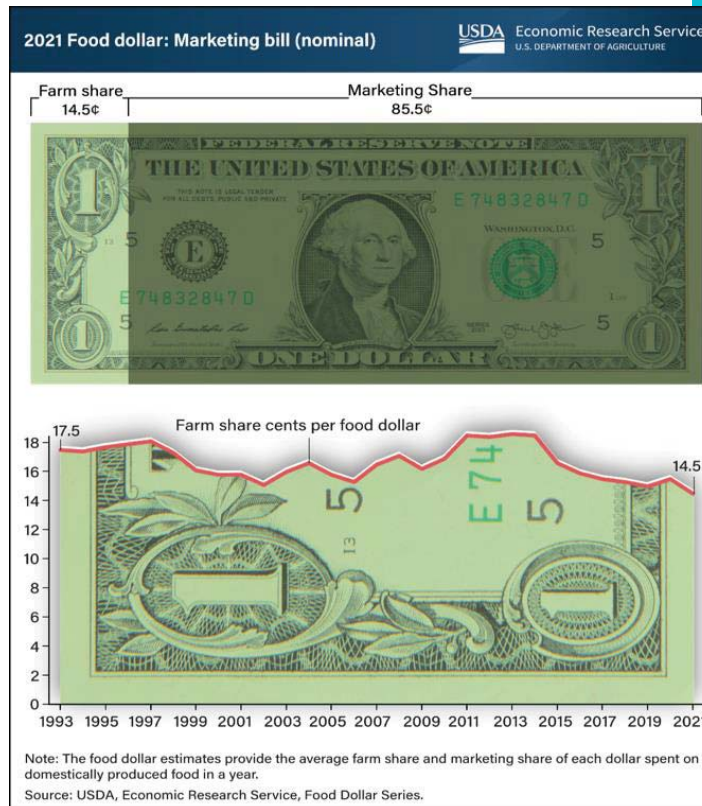


The majority of self-declared vegan and vegetarian Meat Demand Monitor respondents also declared **prior-day meat consumption.**

<https://www.theatlantic.com/health/archive/2025/03/meat-boom-trump-rfk-jr/682150/>



# Let's focus on Growing the Pie



## FINAL THOUGHT

---

Globally, the public  
wants meat protein.  
**Pork has an opportunity.**



More information available at



This presentation will be available in PDF format at:

<http://www.agmanager.info/about/contributors/individual/tonsor.asp>

**Glynn T. Tonsor**

Professor

Dept. of Agricultural Economics

Kansas State University

Email: [gtonsor@ksu.edu](mailto:gtonsor@ksu.edu)

Twitter: @TonsorGlynn

<https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data>





# Thanks!



Scan Code to  
Stay in Touch

---



*Consumer Focused. Producer Led.*

©2025 Copyright. National Pork Board. This message is  
funded by America's Pork Producers and the Pork Checkoff.

