



# Annual Meat Conference

Tuesday, March 3, 2026

National Harbor, MD



# The Time is Now: Pork's Value Story at Retail



**Sarah Showalter**  
Director, Business &  
Consumer Insights  
National Pork Board



**Glynn Tonsor**  
Professor, Department of  
Agriculture  
Kansas State University



Moderator:  
**Anthony Monaco**  
Director, Fresh Meat  
Procurement  
C&S Wholesale Grocers, Inc.



# Meat Demand Matters!

See AMSA webinar for “long overview”

<https://meatscience.org/publications-resources/webinars/webinar/economic-drivers-and-market-trends-in-meat>



**Glynn Tonsor, Ph.D.**

Professor, Dept. Ag.  
Economics

**KANSAS STATE**  
UNIVERSITY.



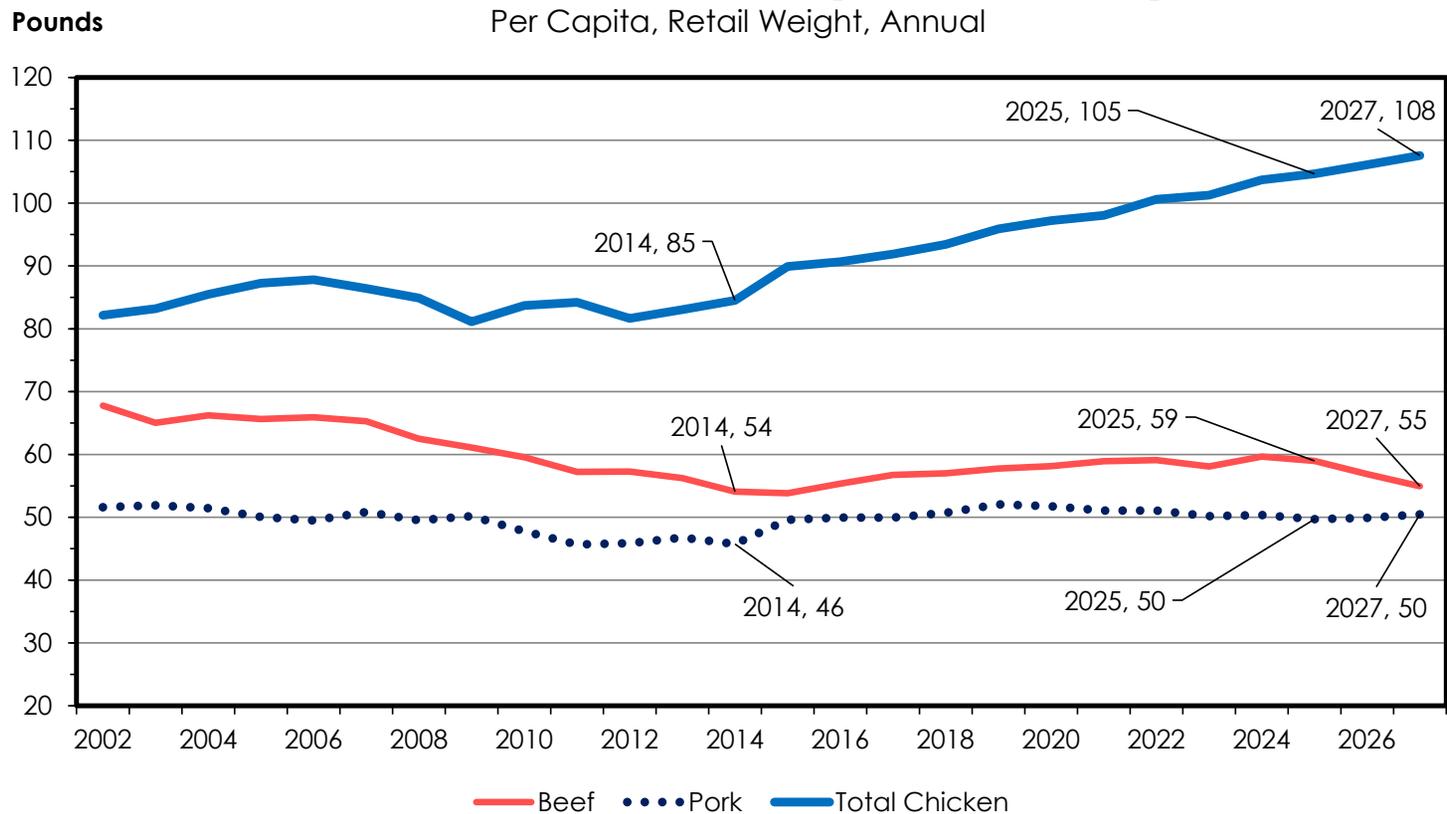
*Economic Drivers  
and Market  
Trends in Meat*

January 15 | 1:00 pm CST

**Register Now**

**KANSAS STATE** | Agricultural Economics  
UNIVERSITY

# US Red Meat & Poultry Consumption



M-C-10  
12/08/25

Data Sources: USDA-NASS and USDA-ERS, compiled & analysis by Livestock Marketing Information Center (LMIC)

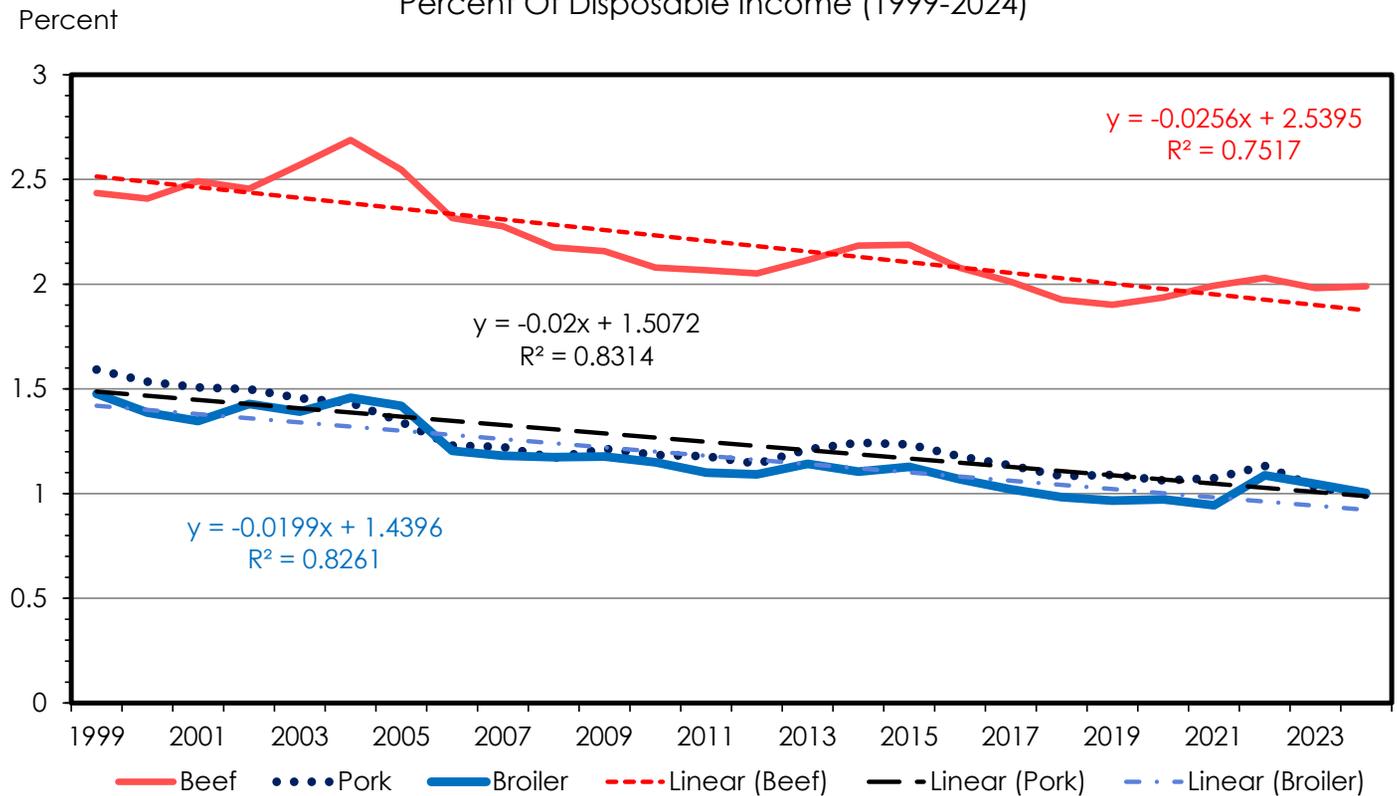


“Affordability Trends”

“It’s All Relative”

## US Expenditures For Meat & Poultry

Percent Of Disposable Income (1999-2024)



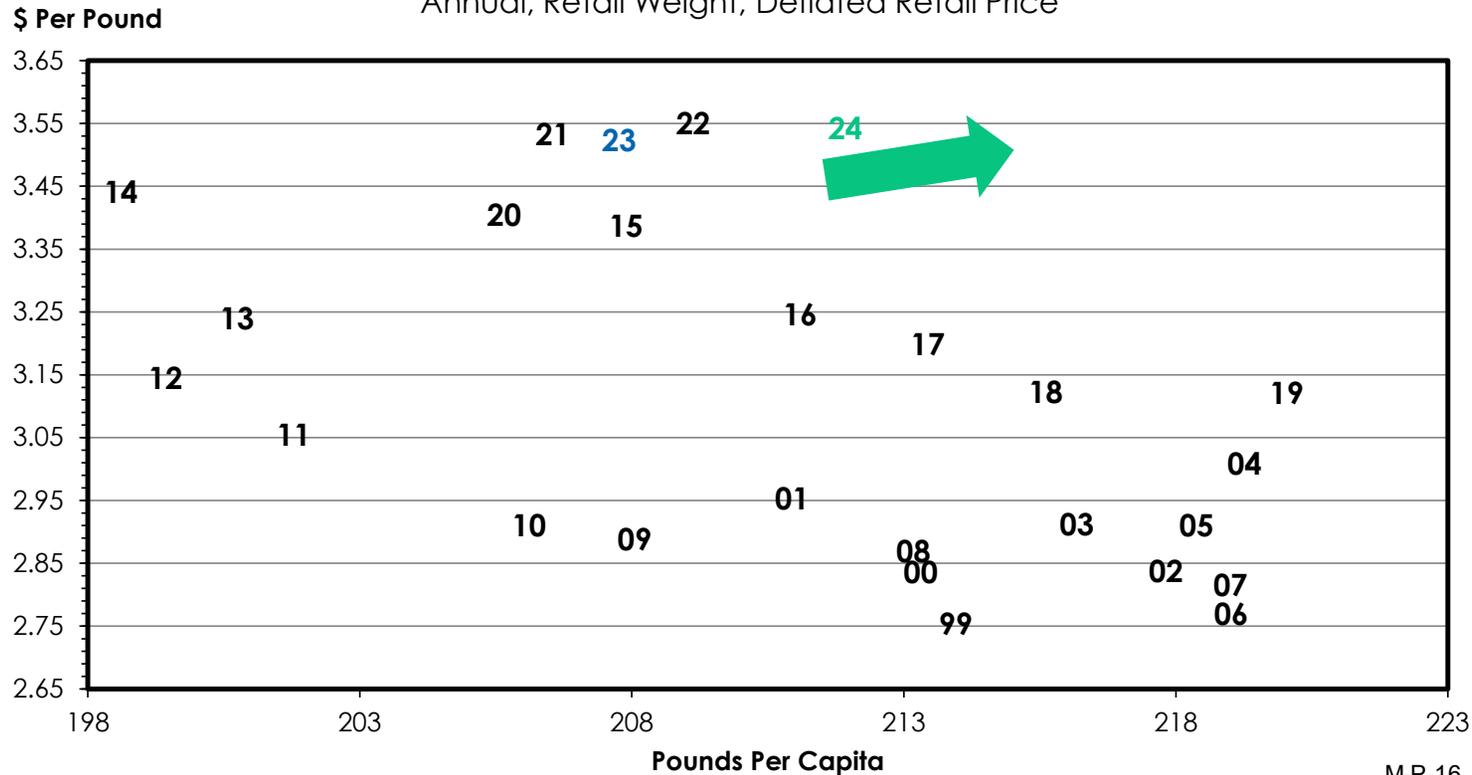
Data Sources: Bureau of Economic Analysis and USDA-ERS, compiled by Livestock Marketing Information Center (LMIC)

M-C-16  
12/08/25



# Meat & Poultry Price-Quantity Relationship

Annual, Retail Weight, Deflated Retail Price



**More pounds at higher prices ONLY happens via demand growth!**

Data Sources: Bureau of Economic Analysis and USDA-ERS, compiled by Livestock Marketing Information Center (LMIC)

M-P-16  
03/10/25



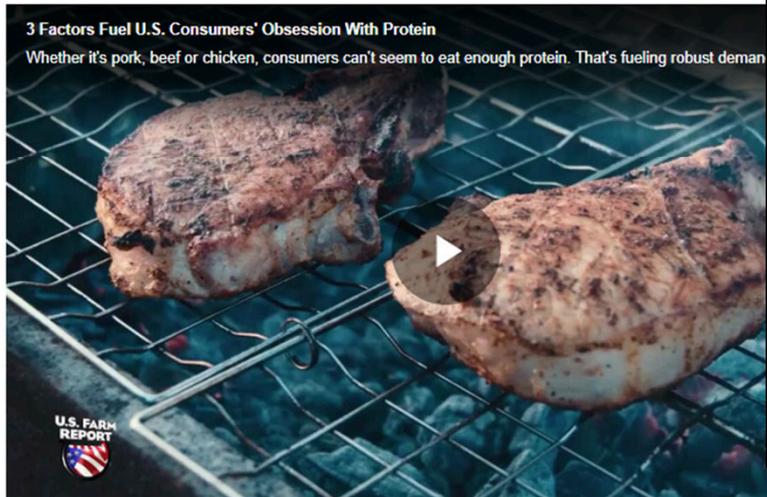
PORK BUSINESS/ NEWS/ INDUSTRY

## 3 Factors Fueling Americans' Obsession with Protein

Whether it's pork, beef or chicken, consumers can't seem to eat enough protein. That's fueling robust demand and prices for livestock producers.



By Tyne Morgan · June 06, 2025 10:48 AM



Meat is having a moment, and the craze for more protein is benefiting

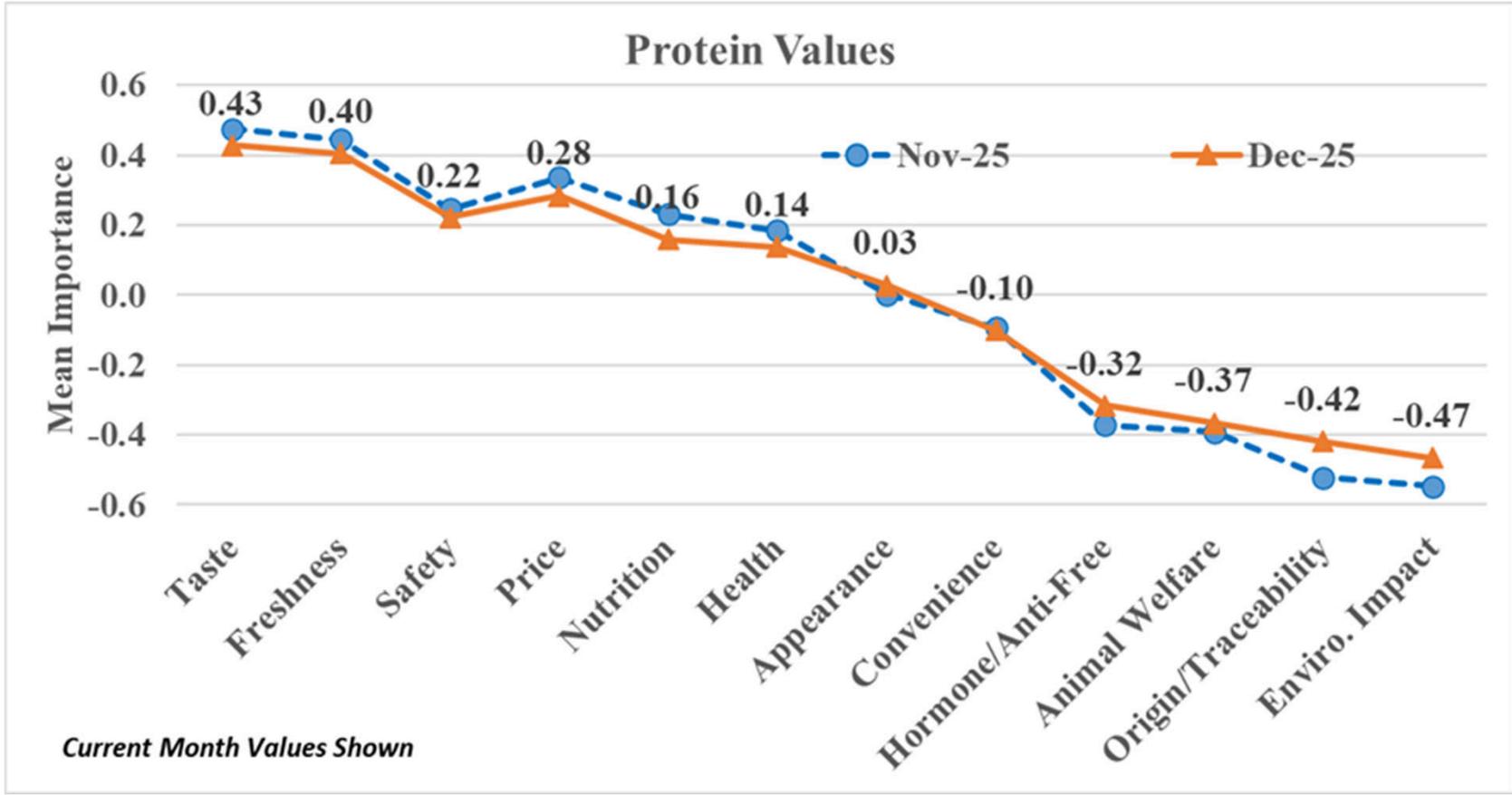
DROVERS/ NEWS/ INDUSTRY/ TOP STORY

## Consumers Confirm Protein is In: Meat Continues to Have Its Moment on the Plate

K-State's Glynn Tonsor says the July Meat Demand Monitor revealed positive trends in meat consumption and consumer attitudes toward protein purchases.

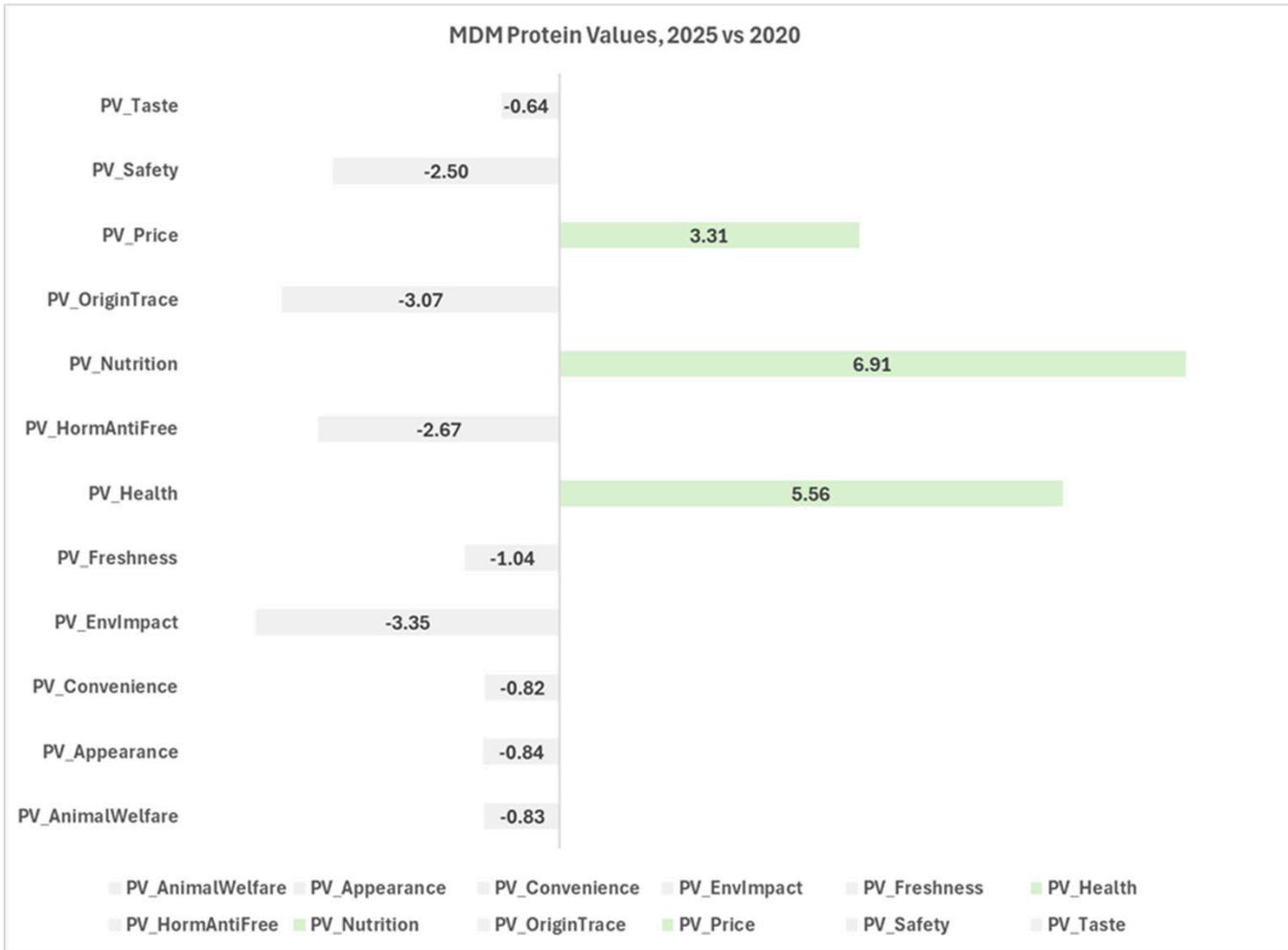


By Angie Stump Denton · August 12, 2025 02:21 PM



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

MDM Protein Values, 2025 vs 2020





Food Policy

Volume 138, January 2026, 103026



## GLP-1 use and protein demand

Justin D. Bina <sup>a</sup> , Glynn T. Tonsor <sup>b</sup> , Timothy J. Richards <sup>a</sup>

Show more

Add to Mendeley Share Cite

<https://doi.org/10.1016/j.foodpol.2025.103026>

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## July '24 to June '25 MDM Data

- 12% current GLP-1 users
- Male, ages 18-44, >\$100K income

## Meat Demand Impacts

- GLP-1 users have higher WTP for most protein items
- GLP-1 users have reduced price sensitivity for most protein items



# Meat Demand Monitor (MDM)

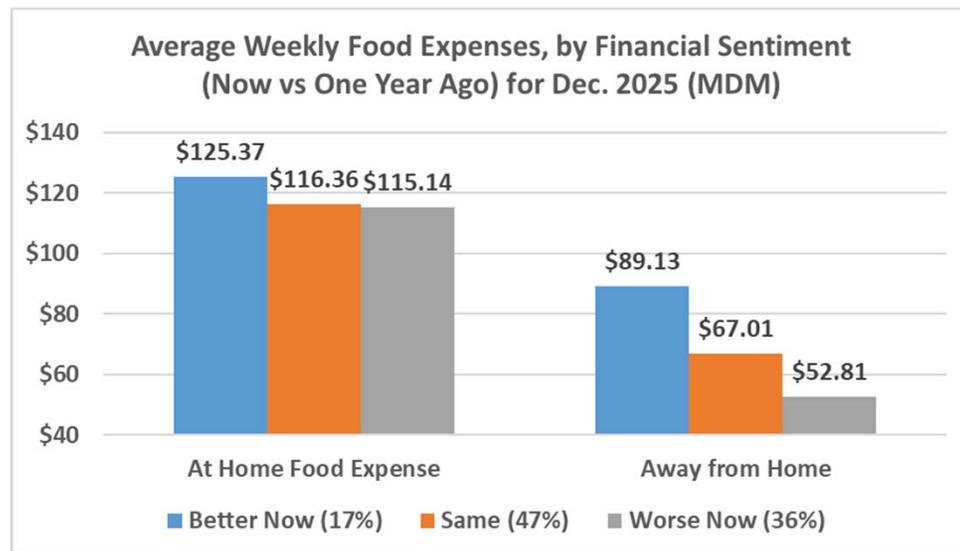
APOLLO

K-shaped economy for consumers



Sources: Federal Reserve Bank of Atlanta, Macrobond, Apollo Chief Economist

<https://www.apolloacademy.com/the-k-shaped-economy/>



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

# Growing the pork pie takes volume times price

## U.S. pork no longer the 'other' meat as campaign celebrates whole hog

Pork demand is critical to the live hog sector; optimism building around current pro-meat protein environment.



Ann Hess, Content Producer, National Hog Farmer  
May 27, 2025

9 Min Read



## Pork demand impacts the bottom line much more than producers may realize

Meat Demand Monitor finds more meat consumption frequency as household finances improve, new consumption on the horizon.



Ann Hess, Content Producer, National Hog Farmer  
February 25, 2025

7 Min Read



2023 Food dollar: Marketing bill (nominal)



# Consumer Pork Demand Retail Price Sensitivity (Jan. 2020 to July 2025 Comparison of 52 U.S. Retail Markets and 6 Pork Products)

- Beef, chicken and other pork product retail prices have less impact than own-price in retail pork purchasing
- ✓ ***While cross-price effects matter, own-sector impacts remain MUCH more important***

# Meeting Consumers Where They Are

# Consumption Happens at Home



**Circana**  
December 2024

**86%**

At Home

**14%**

Away From Home



**Datassential Survey**  
January 2025

**73%**

At Home

**22%**

Away From Home

4% Skipped



**NPB At-Home Meat Tracker**  
Full Year 2025

**84%**

At Home

**12%**

Away From Home

4% Skipped



**K-State Meat Demand Monitor**  
January 2026

**69%**

At Home

**14%**

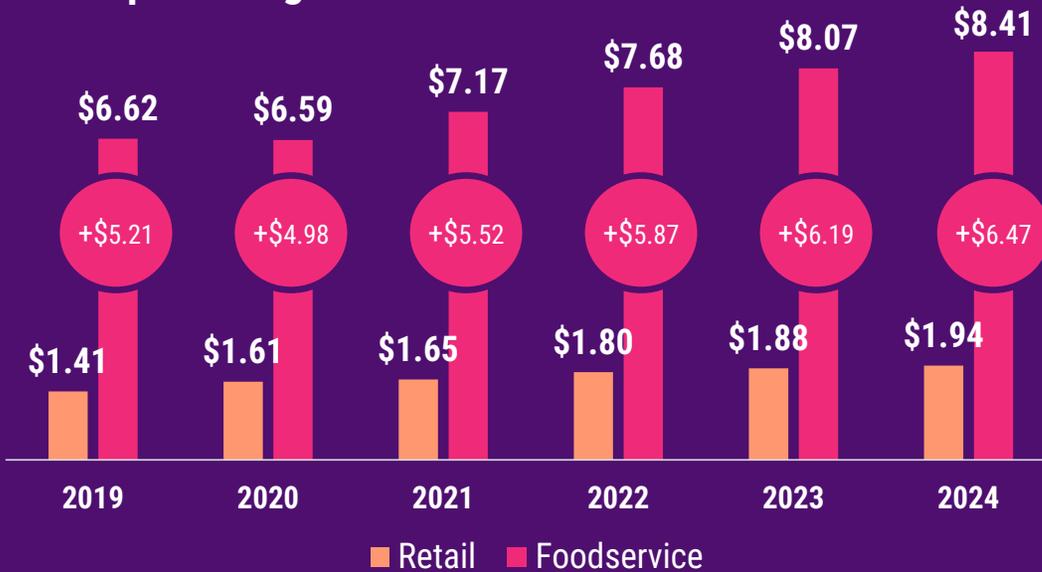
Away From Home

17% Skipped

# Per Occasion ...

Foodservice costs are 4.3x those of at-home occasions, with the absolute dollar gap widening

## Cost per Eating Occasion



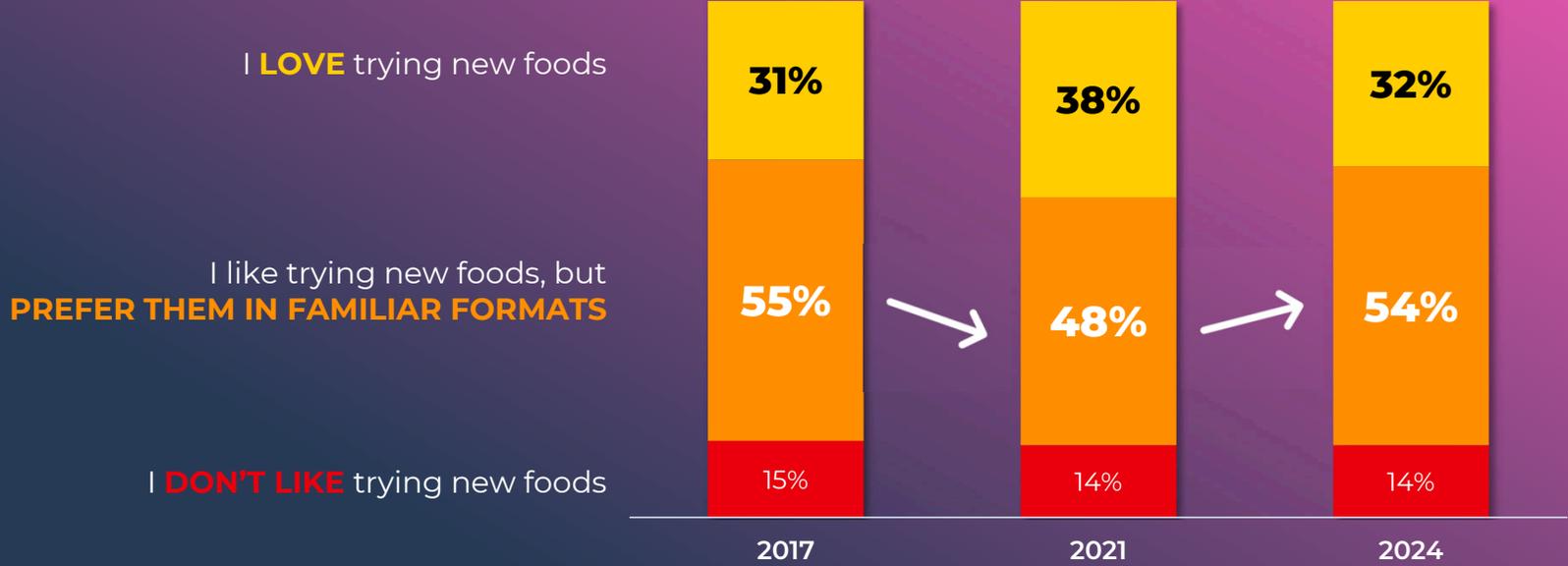
# How do they consume away from home?

## new foods away from home

**46%** **+12 pts**  
2026 From 2017

had some or all new items  
in their last meal away from home

# Consumers have bounced back to a strong preference for familiar formats



Consumers are eating more  
**globally influenced foods**

**47%**

2025

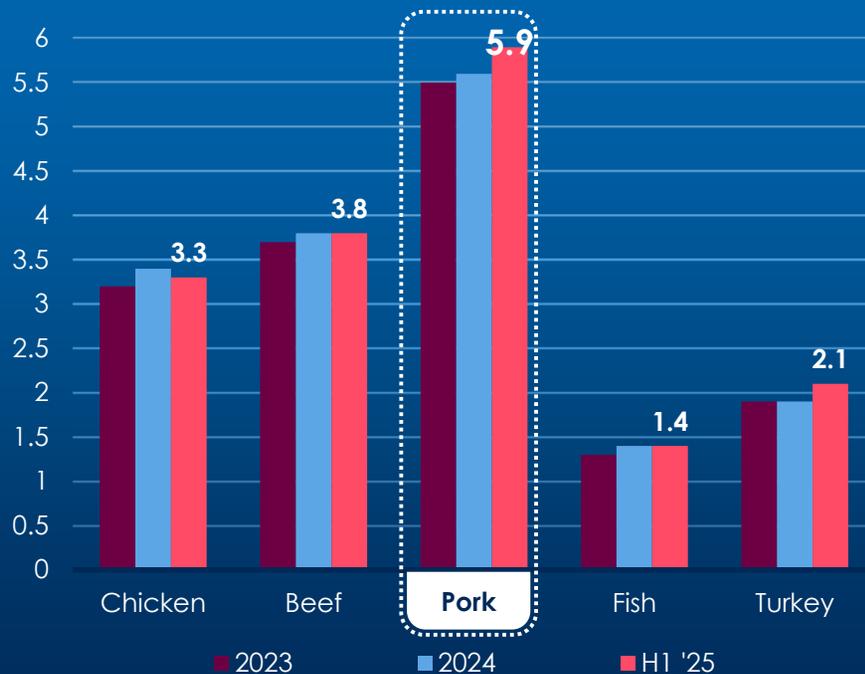
**+19 pts**

From 2017

Ate a globally influenced food beyond  
**mainstream** Italian, Mexican and Chinese  
in the last week

# Across the Meatcase

Average # of Cuts Used Monthly



Pork Usage (Once a month or more often)  
H1'25 — Total U.S. National

**86%** Processed Pork

Bacon  
Ham deli  
Pork sausage  
Pepperoni

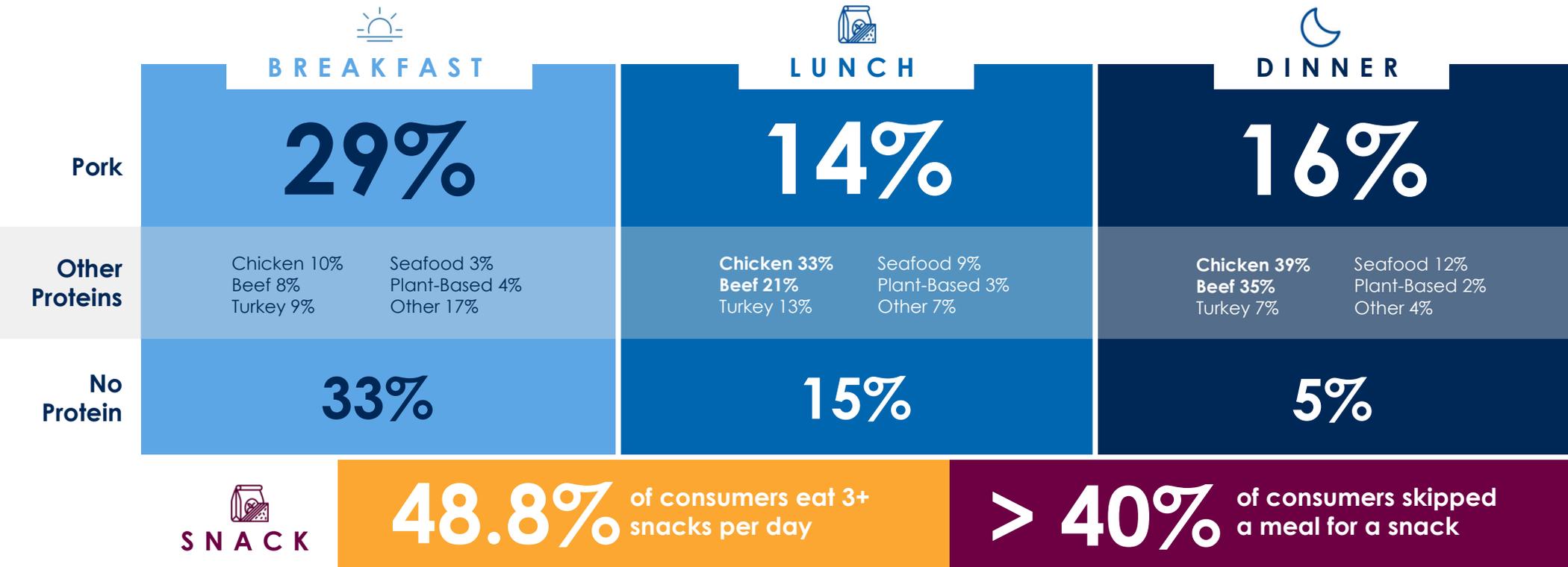
Ham  
Salami/prosciutto  
RTE pork

Fresh Pork **69%**

Pork chops  
Pork tenderloin  
Pork ribs  
Pork roast

Ground pork  
Cut/marinated pork  
Pork belly  
Variety meats

# Consumers want **new, familiar formats** and **global cuisines**.



Sources: National Pork Board At-Home Meat Tracker, H1 2025; 2025 Circana Snack Survey; and 2025 Datassential Omnibus

*pork* TASTE WHAT PORK CAN DO.®

**FROM AFFORDABLE FLAVOR**  
MAKE IT WITH PORK.

**DISCOVER PORK**



**26g PROTEIN**

**pork** TASTE WHAT PORK CAN DO.  
BROUGHT TO YOU BY AMERICA'S PIG FARMERS.

**Bratwurst Sausage**

**Pork Chops**

**BALANCED? YEAH. BORING? NEVER.**

**Pork Shoulder Carnitas**



**PREP ONCE. FUEL ALL WEEK.**

EASY DIFFICULT EXPERT

**EGG BITES WITH SAUSAGE**

**PULLED PORK ARUGULA SALAD**



**IF YOU LOVE PROTEIN.**  
PORK: A COMPLETE PROTEIN.

**DISCOVER PORK**

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**pork** TASTE WHAT PORK CAN DO.

**Flavor meets protein.**  
Pork is an ultimate protein.

**Discover Pork**

**FROM BREAKFAST HACKS**

PORK: A COMPLETE PROTEIN.

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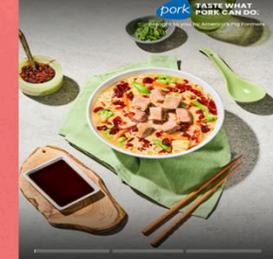


**FLAVOR MEETS PROTEIN.**  
COMPLETE PROTEIN IN EVERY BITE OF PORK.

**DISCOVER PORK**



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**FROM LEAN LUNCHES**

PORK: A COMPLETE PROTEIN.

**DISCOVER PORK**

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**26g PROTEIN**



**FROM FUELING TO FILLING.**  
COMPLETE PROTEIN IN EVERY BITE OF PORK.

**DISCOVER PORK**

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**KOREAN PORK LETTUCE WRAPS**



**GET COMPLETE PROTEIN WITH PORK.**

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**COMPLETE PROTEIN IN EVERY BITE OF PORK.**

**DISCOVER PORK**

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**IF YOU LOVE PROTEIN.**  
PORK: A COMPLETE PROTEIN.

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**MORE FLAVOR FOR LESS.**

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**DISCOVER PORK**



CREATIVE IN MARKET

# Continue Driving Purchase at Retail

**FROM BREAKFAST HACKS**

PORK: A COMPLETE PROTEIN.

**DISCOVER PORK**



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**POWER BOWLS FOR YOUR PROTEIN GOALS.**

GET COMPLETE PROTEIN WITH PORK.

**DISCOVER PORK**

**pork** TASTE WHAT PORK CAN DO.  
BROUGHT TO YOU BY AMERICA'S PIG FARMERS.



**MEAL PREPPED.**

GET COMPLETE PROTEIN WITH PORK.

**DISCOVER PORK**

**pork** TASTE WHAT PORK CAN DO.  
BROUGHT TO YOU BY AMERICA'S PIG FARMERS.



**FROM WOK TO WOW**

PORK: A COMPLETE PROTEIN.

**DISCOVER PORK**

**pork** TASTE WHAT PORK CAN DO.  
BROUGHT TO YOU BY AMERICA'S PIG FARMERS.



**PORK: A COMPLETE PROTEIN.**

**DISCOVER PORK**

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**GET COMPLETE PROTEIN WITH PORK.**

**DISCOVER PORK**

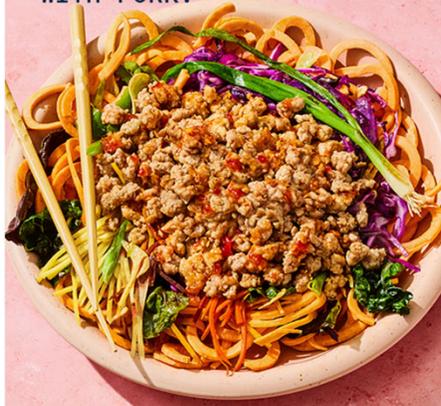
**pork** TASTE WHAT PORK CAN DO.  
BROUGHT TO YOU BY AMERICA'S PIG FARMERS.



**MEALS THAT DO MORE.**

GET COMPLETE PROTEIN WITH PORK.

**pork** TASTE WHAT PORK CAN DO.  
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# What are the biggest opportunities to bring younger meat shoppers to retail and pork?

## Try New Things

Trial happens at foodservice

.....  
**Reframe beyond traditional/holiday occasions — pork as an ingredient in global cuisine**

## Make Familiar Better

Like familiar formats

.....  
**Lean into global flavors and give them new twists**

## Size It for Snacking

Consumers are replacing meals with **a SNACK!**

.....  
**Solve snacking by going to mini meals that move with them**

## Starting the Day Right

No protein at breakfast

.....  
**Bring them back to breakfast — breakfast for dinner**

# Sarah Showalter

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