Agriculture & Horticulture DEVELOPMENT BOARD

Pig Pocketbook 2014

Pig Pocketbook 2014

Contents

Chapter 1 – Marketing chain

Table 1.1 UK pig meat supply balance (a)

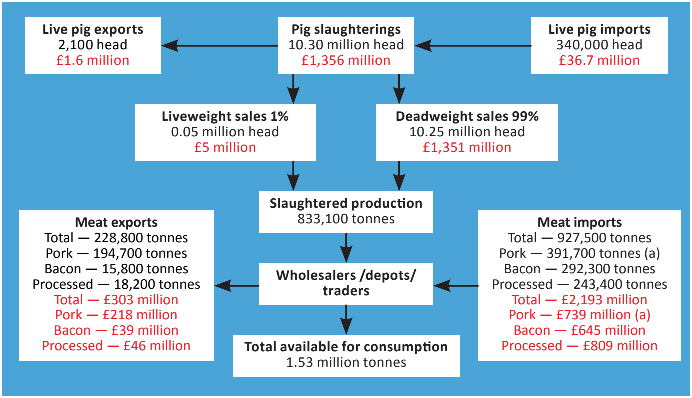
'000 tonnes	2010	2011	2012	2013	2014 (f)
Production	758	806	825	833	851
Imports (a)	941	960	942	927	934
(Fresh/frozen)	(402)	(410)	(387)	(392)	(401)
(Bacon (cwe))	(366)	(328)	(302)	(292)	(300)
(Processed)	(173)	(223)	(254)	(243)	(233)
Exports (a)	186	207	203	229	239
Total consumption	1,513	1,559	1,564	1,532	1,546
Self-sufficiency (%)	50.1	51.7	52.7	54.4	55.1

(a) Total imports and exports including processed meat. Includes re-exported pork. All fresh meat and processed products, including bacon, have been converted to carcase weight equivalent.

(f) Forecast

Source: Defra, GTIS/HMRC, AHDB Market Intelligence

Figure 1.1 UK product flows in the pig meat marketing chain in 2013



(a) Includes pork imports which are subsequently cured in the United Kingdom.

Volumes are carcase weight equivalent.

Source: AHDB Market Intelligence/BPEX

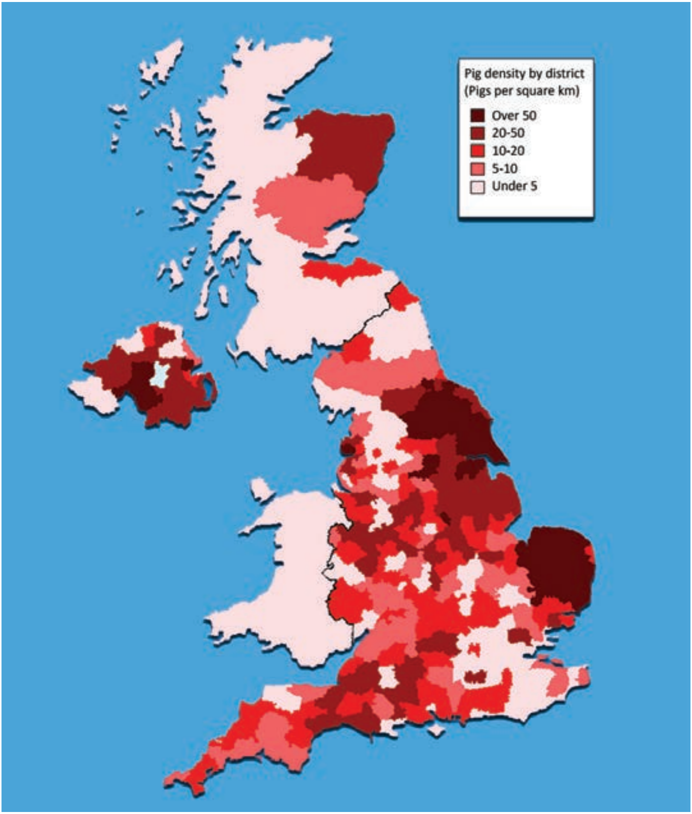
Table 1.2 EU pig meat supply balance

'000 tonnes	2009	2010	2011	2012	2013 (e)
Net production	21,416	22,133	22,437	21,990	21,989
Imports	34	22	15	16	15
Exports	1,540	1,839	2,175	2,182	2,177
Consumption	19,910	20,316	20,278	19,824	19,827
Self-sufficiency (%)	108	109	111	111	111

All data is carcase weight equivalent.
(e) Estimate
2009 to 2012 data is based on EU-27 countries, 2013 data is based on EU-28 countries.
Source: EU Commission

Chapter 2 – Pig numbers

Figure 2.1 Density of pigs by district, June 2010



Source: Defra

Table 2.1 Pig numbers in the UK, June survey

'000 head	2009*	2010*	2011	2012	2013
Sows in pig	304	281	279	293	284
Gilts in pig	48	67	70	69	66
Other sows	74	79	83	64	70
Total breeding sows	426	427	432	425	421
Gilts for breeding	64	75	75	82	86
Boars for service	17	17	16	16	15
Fattening pigs	4,033	3,942	3,917	3,958	4,363
Total pigs	4,540	4,460	4,441	4,481	4,885

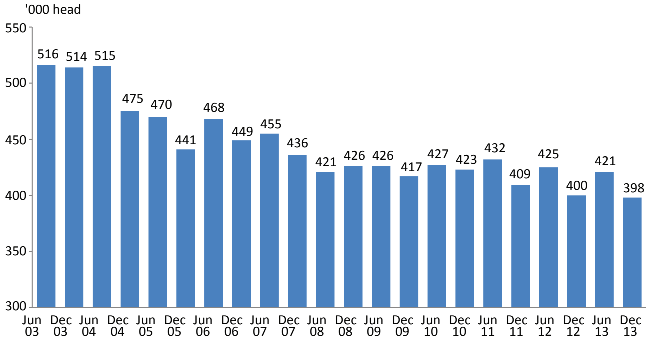
*Census methodology changed in June 2010 and data for 2009 was revised to be in line with the new method. As a result, smaller units were omitted from the survey.
Source: Defra June Agricultural Survey

Table 2.2 UK female breeding pig herd and holding numbers, June survey

	Breeding pigs ('000 head)	Number of holdings ('000)	Average breeding herd size (head)
1997	799	9.7	81
1998	778	9.9	78
1999	689	8.2	84
2000	610	7.2	85
2001	598	6.6	91
2002	558	6.1	92
2003	516	5.8	90
2004	515	6.0	85
2005	470	6.8	69
2006	468	6.2	76
2007	455	6.1	74
2008	421	6.1	75
2009	426	5.8	78
2010	427	6.0	71
2011	432	6.0	72
2012	425	6.1	70
2013	421	n/a	n/a

Census methodology changed from June 2010 and, as a result, smaller units were omitted from the survey.
Source: Defra June Agricultural Survey

Figure 2.2 Breeding sow numbers, UK



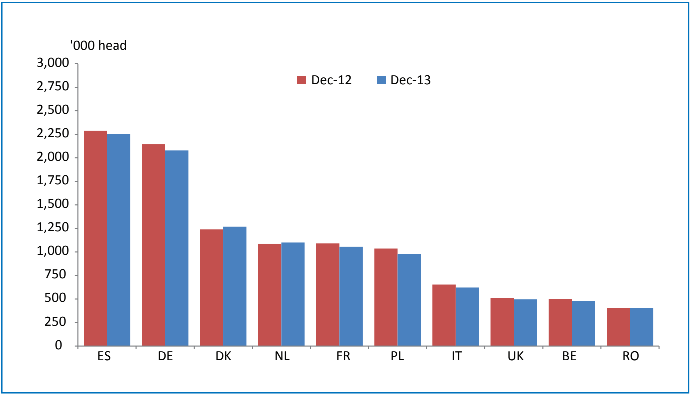
Source: Defra June Agricultural Survey, December census

Table 2.3 Breeding pig numbers by region, June

	2010	2011	2012	2013
England	81%	83%	83%	83%
Wales	1%	1%	1%	1%
Scotland	9%	8%	7%	7%
N Ireland	9%	8%	8%	9%

Source: Defra June Agricultural Survey

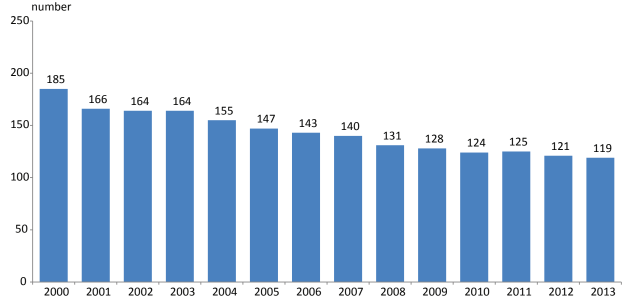
Figure 2.3 Breeding pig numbers in the EU



Source: Eurostat

Chapter 3 – Abattoirs

Figure 3.1 English pig abattoir numbers



Source: AHDB/BPEX

Table 3.1 Abattoirs slaughtering pigs in England

	Abattoir numbers	Of which specialist pig abattoir numbers	Average annual throughput (head)
2000	185	24	53,003
2001	166	19	52,732
2002	164	20	50,105
2003	164	18	44,264
2004	155	20	47,110
2005	147	15	48,620
2006	143	16	50,505
2007	140	16	52,754
2008	131	16	56,234
2009	128	14	55,738
2010	124	15	59,237
2011	125	16	62,152
2012	121	14	67,967
2013	119	15	69,965

Source: AHDB/BPEX data based on abattoirs operating in the calendar year.

Table 3.2 Size profile of all England abattoirs slaughtering pigs, 2013

Size group (head)	Number of abattoirs	Total throughput (head)	Average throughput (head)	Share of throughput (%)
1-10,000	76	213,955	2,815	2.6
10,001-30,000	22	393,082	17,867	4.7
30,001-100,000	7	321,511	45,930	3.9
100,001-500,000	6	1,117,889	186,315	13.4
> 500,001	8	6,279,390	784,924	75.4
Total	119	8,325,827	69,965	100.0

Source: AHDB/BPEX data based on abattoirs operating in the calendar year.

Table 3.3 Size profile of specialist pig abattoirs in England, 2013

Size group (head)	Number of abattoirs	Total throughput (head)	Average throughput (head)	Share of throughput (%)
1-100,000	5	73,476	14,695	1.3
100,001-500,000	4	849,960	212,490	14.5
> 500,001	6	4,937,164	822,861	84.2
Total	15	5,860,600	390,707	100.0

Note: Specialist pig abattoirs are defined as plants where 95 per cent of slaughterings are pigs.
Source: AHDB/BPEX data based on abattoirs operating in the calendar year.

Chapter 4 – Slaughterings and production

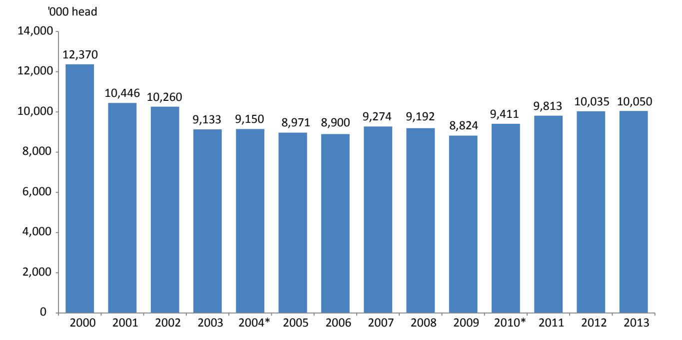
Table 4.1 UK pig slaughterings

('000 head)	Sows and boars	Clean pigs	Total pigs
1999	379	14,350	14,728
2000	321	12,370	12,692
2001	180	10,446	10,626
2002	314	10,260	10,575
2003	241	9,133	9,374
2004*	240	9,150	9,390
2005	202	8,971	9,173
2006	196	8,900	9,097
2007	210	9,274	9,484
2008	235	9,192	9,427
2009	207	8,824	9,031
2010*	225	9,411	9,635
2011	250	9,813	10,063
2012	265	10,035	10,299
2013	252	10,050	10,302

* 53-week year

Source: Defra, AHDB Market Intelligence

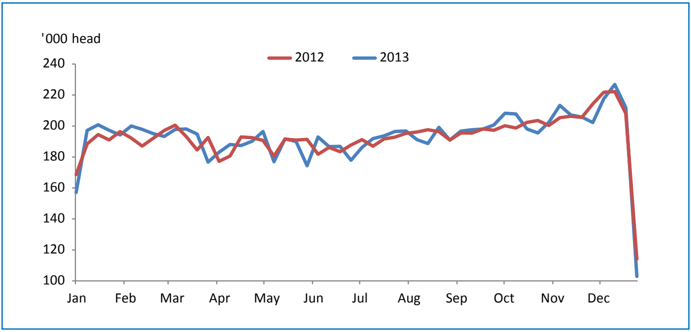
Figure 4.1 Trends in UK clean pig slaughterings



* 53-week year

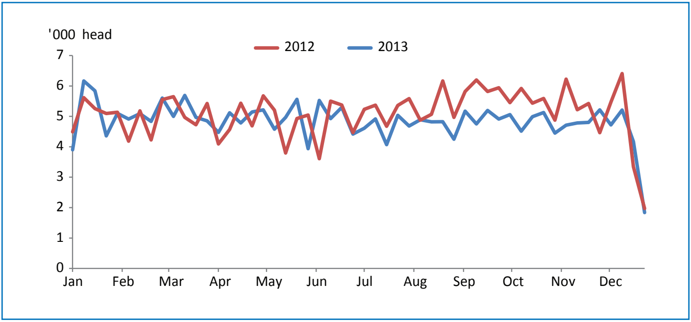
Source: Defra

Figure 4.2 Weekly clean pig slaughter, UK



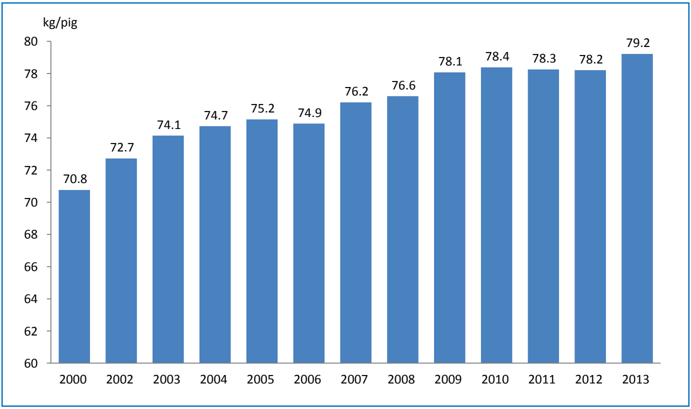
Source: AHDB Market Intelligence, Defra

Figure 4.3 Weekly sow culling, UK



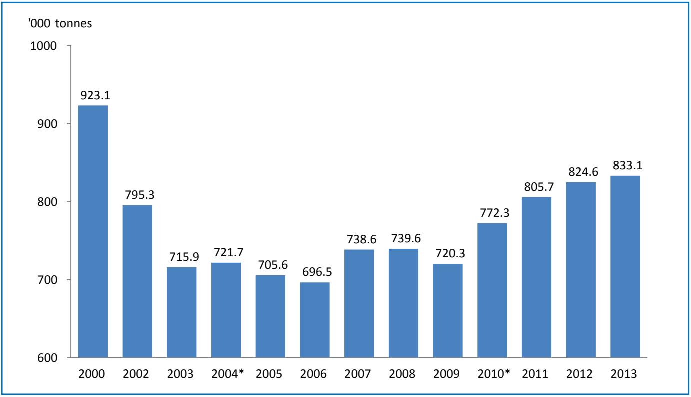
Source: AHDB Market Intelligence

Figure 4.4 Average clean pig carcase weights, UK



Source: Defra

Figure 4.5 Pig meat production trends, UK



* 53-week year

Source: Defra

Table 4.2 Industry trends (productivity and production)

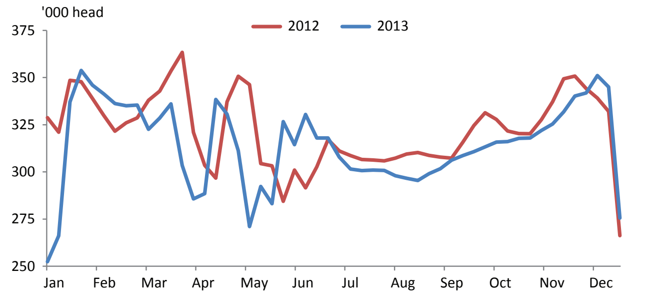
	2000	2005	2008	2009	2010	2011	2012	2013
UK ave sow productivity (a)								
Pigs per sow	19.0	17.7	20.0	19.5	20.2	21.7	22.5	23.0
Pig meat per sow (kg)	1,345	1,331	1,528	1,525	1,587	1,694	1,761	1,824
Slaughterings and production								
Clean pig slaughter ('000 head)	12,370	8,971	9,192	8,824	9,411	9,813	10,035	10,050
* ACW (kg)	70.8	75.2	76.6	78.1	78.4	78.3	78.2	79.2
= clean pig prod ('000 tonnes)	875	674	704	689	738	768	785	796
Sow slaughter ('000 head)	321	202	235	207	225	250	265	252
* ACW (kg)	148.4	155.5	151.3	151.7	154.5	151.3	150.3	146.6
= sow meat prod ('000 tonnes)	48	31	36	31	35	38	40	37
Total pig meat production ('000 tonnes)	923	706	740	720	772	806	825	833

* ACW = Average carcase weight

(a) **NOT** survey results. Based on relationship between clean pig slaughter and lagged breeding herd.

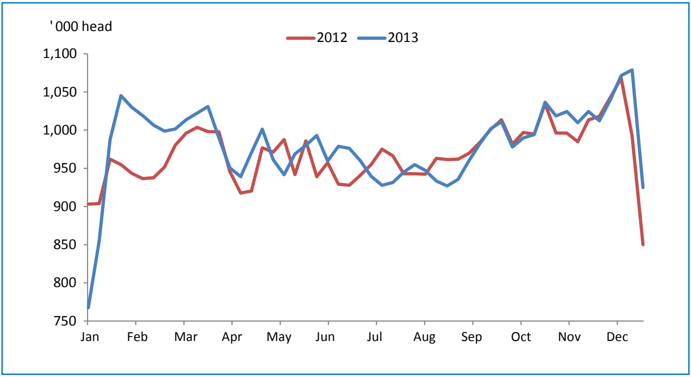
Source: Defra, AHDB Market Intelligence

Figure 4.6 Clean pig slaughterings: three-week rolling average, Denmark



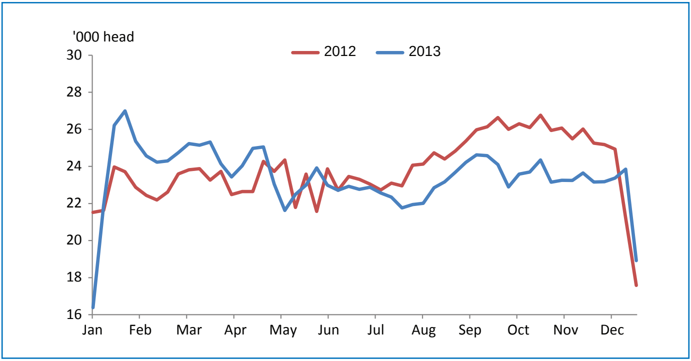
Source: Danish Agriculture & Food Council

Figure 4.7 Clean pig slaughterings: three-week rolling average, Germany



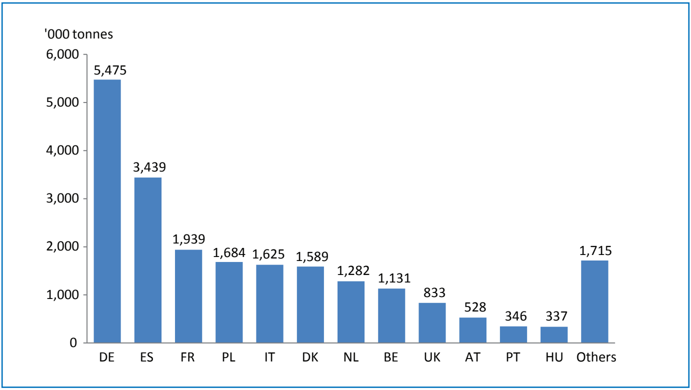
Source: AMI

Figure 4.8 Weekly sow slaughterings, Denmark/Germany



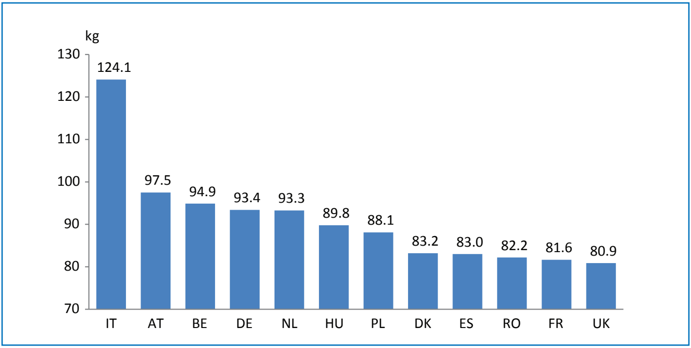
Source: Danish Agriculture & Food Council, AMI

Figure 4.9 EU pig meat production, 2013



Source: Eurostat

Figure 4.10 Average pig carcase weights in the EU, 2013



Source: Eurostat

Chapter 5 – Livestock and meat prices

Table 5.1 GB deadweight pig prices

	GB DAPP (EU Specification)				Cull sows			
	2011	2012	2013	2012-13	2011	2012	2013	2012-13
	p per kg dw			% change	p per kg dw			% change
January	136.69	143.46	159.32	+11.1	79.88	109.69	94.90	-13.5
February	134.93	139.66	156.21	+11.9	86.20	115.12	99.72	-13.4
March	136.21	141.85	156.96	+10.7	94.57	121.33	106.68	-12.1
April	141.84	146.17	160.94	+10.1	104.06	122.05	103.25	-15.4
May	148.76	148.97	164.06	+10.1	101.52	116.94	97.91	-16.3
June	152.24	149.79	166.79	+11.3	96.97	115.47	102.62	-11.1
July	152.46	150.45	168.55	+12.0	100.06	108.83	112.29	+3.2
August	148.62	150.40	167.90	+11.6	103.67	109.21	na	na
September	145.34	152.91	170.07	+11.2	106.32	112.94	na	na
October	145.52	157.74	171.87	+9.0	108.15	113.56	na	na
November	147.41	160.25	171.56	+7.1	114.28	112.41	na	na
December	147.74	160.95	171.31	+6.4	113.75	105.08	na	na

Since August 2013, it has not been possible to publish average sow prices because too few companies have been slaughtering sows.

Source: AHDB Market Intelligence

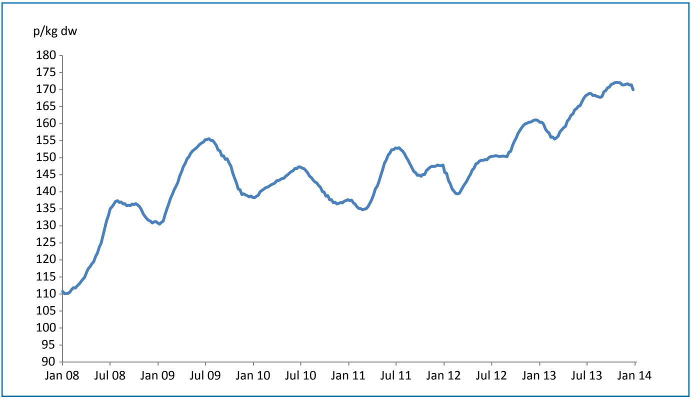
Table 5.2 GB average weaner prices

	30kg weaners				7kg weaners
	2011	2012	2013	2012-13	2013
	£ per head			% change	
January	41.81	44.76	46.34	+3.5	N/A
February	41.05	44.59	46.38	+4.0	N/A
March	41.09	45.62	47.55	+4.2	N/A
April	43.55	45.71	49.06	+7.3	N/A
May	45.58	44.45	49.84	+12.1	N/A
June	45.81	42.95	51.77	+20.5	N/A
July	45.58	40.93	53.55	+30.8	40.64
August	42.80	39.31	53.66	+36.5	41.09
September	40.63	39.02	54.03	+38.5	41.45
October	40.50	41.27	54.26	+31.5	42.18
November	42.28	44.99	55.60	+23.6	42.93
December	44.06	46.14	56.32	+22.1	42.93

Note: The methodology for collecting 30kg weaner prices changed from November 2013. Figures after that date are not directly comparable with earlier months.

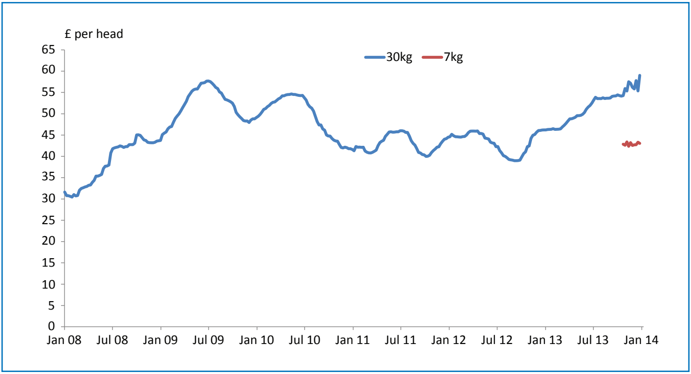
Source: AHDB Market Intelligence

Figure 5.1 GB average producer pig prices (DAPP)



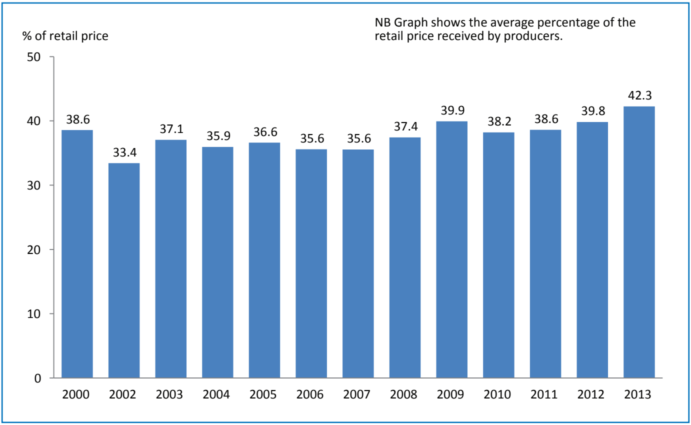
Source: AHDB Market Intelligence

Figure 5.2 GB average weaner prices



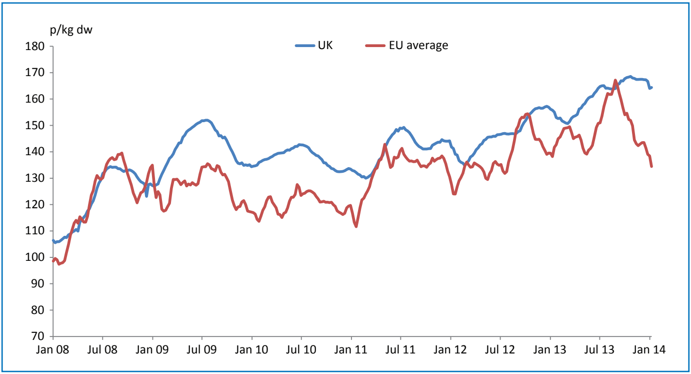
Source: AHDB Market Intelligence

Figure 5.3 GB retail: producer price spreads



Source: AHDB Market Intelligence

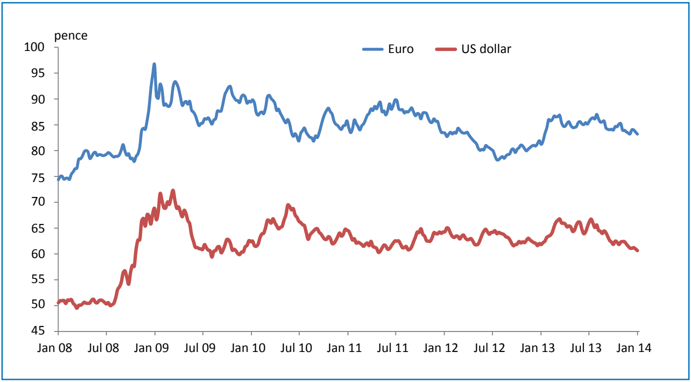
Figure 5.4 UK and EU pig meat reference prices



Source: EU Commission

Chapter 6 – Imports and exports

Figure 6.1 Sterling exchange rates



Source: PACIFIC Exchange Rate Service

Table 6.1 Volume of total UK pig meat imports

(tonnes, product weight)	2009	2010	2011	2012	2013
Fresh/frozen meat	360,180	363,158	372,768	349,198	351,359
Bacon	322,942	312,597	279,955	257,814	249,847
Sausages	83,988	81,580	99,137	107,537	105,702
Processed hams, shoulders and pieces *	88,008	91,687	121,607	141,251	134,457
Total	855,118	849,022	873,467	855,800	841,365
Live pigs (head)	497,638	652,799	696,282	684,918	339,558

* Including canned

Source: GTIS, HM Revenue and Customs

Table 6.2 Value of total UK pig meat imports

(£'000)	2009	2010	2011	2012	2013
Fresh/frozen meat	636,196	656,215	723,830	690,174	739,297
Bacon	765,954	718,475	676,902	648,610	644,871
Sausages	274,154	258,263	299,019	330,206	344,437
Processed hams, shoulders and pieces *	277,646	265,416	374,041	419,114	464,156
Total	1,953,950	1,898,369	2,073,792	2,088,104	2,192,761
Live pigs	50,061	62,023	69,452	72,569	36,726

* Including canned

Source: GTIS, HM Revenue and Customs

Table 6.3 UK fresh/frozen pork imports by source

(tonnes, product weight)	2009	2010	2011	2012	2013
Total	360,180	363,158	372,768	349,198	351,359
of which from:					
Denmark	100,345	99,759	117,567	99,561	88,878
Germany	48,604	48,386	53,438	66,731	77,364
Netherlands	52,778	64,489	58,864	49,038	56,303
Belgium	43,934	48,616	36,474	28,043	32,098
Ireland	42,887	46,687	44,641	37,652	31,812
France	32,164	30,075	31,746	33,655	30,079
Spain	25,856	16,275	17,666	23,357	24,390
Italy	1,775	1,428	2,967	2,779	3,627
Poland	1,481	748	2,870	2,395	2,193
Portugal	1,068	1,366	2,794	3,227	1,548
Chile	3,299	1,792	1,644	1,421	1,057
United States	5,017	2,838	1,120	673	946

Source: GTIS, HM Revenue and Customs

Table 6.4 UK bacon imports by source

(tonnes, product weight)	2009	2010	2011	2012	2013
Total	322,942	312,597	279,955	257,814	249,847
of which from:					
Denmark	146,915	136,659	116,261	105,942	103,680
Netherlands	117,961	116,303	106,216	104,466	92,790
Germany	33,967	38,973	39,837	32,170	34,126

Source: GTIS, HM Revenue and Customs

Table 6.5 Volume of total UK pig meat exports

(tonnes, product weight)	2009	2010	2011	2012	2013
Fresh/frozen meat	104,363	131,344	144,427	154,300	180,548
Bacon	21,199	24,492	34,082	15,509	13,535
Sausages	7,081	7,183	6,402	9,702	10,831
Processed hams, shoulders and pieces *	16,066	14,343	9,963	12,268	12,018
Total	148,709	177,362	194,874	191,779	216,932
Live pigs (head)	7,663	8,623	11,875	3,810	2,079

* Including canned

Source: GTIS, HM Revenue and Customs

Table 6.6 Value of total UK pig meat exports

(£'000)	2009	2010	2011	2012	2013
Fresh/frozen meat	115,685	148,938	171,274	189,342	217,679
Bacon	51,355	44,499	59,440	36,977	39,115
Sausages	14,699	14,910	13,951	17,204	17,176
Processed hams, shoulders and pieces *	43,562	35,564	27,267	32,906	28,984
Total	225,301	243,911	271,932	276,429	302,954
Live pigs	2,953	2,504	5,950	1,863	1,631

* Including canned

Source: GTIS, HM Revenue and Customs

Table 6.7 UK fresh/frozen pork exports by destination

(tonnes, product weight)	2009	2010	2011	2012	2013
Total	104,363	131,344	144,427	154,300	180,548
of which to:					
(EU-28)	(79,248)	(107,153)	(106,016)	(112,331)	(127,423)
Germany	27,624	31,826	31,739	32,529	30,940
Ireland	16,525	27,461	25,381	26,148	28,927
China	1,633	1,969	4,003	11,458	25,006
Netherlands	19,917	26,372	19,611	18,835	21,467
Denmark	3,321	6,763	6,452	12,255	20,397
Hong Kong	18,394	17,311	26,610	19,025	15,842
Sweden	97	21	1,891	8,374	7,660
Belgium	2,887	3,800	6,146	5,648	5,931
Italy	3,966	3,710	2,927	1,945	3,196
United States	2,024	2,262	2,223	2,677	3,112
France	662	3,054	7,039	1,504	2,556
Côte d'Ivoire	-	-	25	747	2,105
Poland	2,420	2,046	1,596	1,395	1,717

Source: GTIS, HM Revenue and Customs

Table 6.8 EU fresh/frozen pig meat exports to non-EU countries

000 tonnes (product weight)	2010	2011	2012	2013
Live animals	97.2	84.9	40.4	30.1
Fresh and frozen pork	1,162.8	1,432.8	1,392.1	1,452.2
Salted, dried, smoked pig meat	30.6	34.2	32.6	31.6
Offals	839.8	1,045.1	1,009.5	1,005.5
Sausages	105.5	125.7	129.0	131.3
Prepared and preserved	60.3	75.0	77.4	80.3
Pig fat	11.8	14.0	11.3	10.1
Lard	377.2	379.9	380.2	359.9
Total	**2,685.2**	**3,191.5**	**3,072.5**	**3,100.9**

Source: European Commission

Chapter 7 – Consumption

Table 7.1 GB retail value sales by type of outlet

(%)	Multiples	Freezer centres	Butchers	Other
Pork				
2011	84.9	3.3	9.2	2.6
2012	84.9	3.3	9.0	2.8
2013	84.9	3.2	8.8	3.1
Bacon				
2011	88.0	5.0	4.1	2.9
2012	87.9	5.2	3.8	3.1
2013	87.4	5.6	3.8	3.2

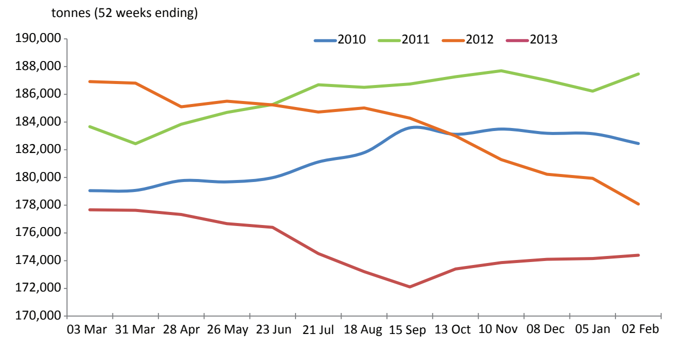
Data covers 52 weeks ending in early February of the following year.
Source: Kantar WorldPanel

Table 7.2 UK per capita consumption of pig meat and total meat

	Pig meat	Total meat (including poultry) kg/person/year
2000	23.6	78.8
2005	24.8	83.1
2006	25.0	82.8
2007	25.8	82.3
2008	24.7	79.4
2009	24.5	77.3
2010	24.3	78.7
2011	24.9	79.0
2012	24.8	78.6
2013	24.1	77.3

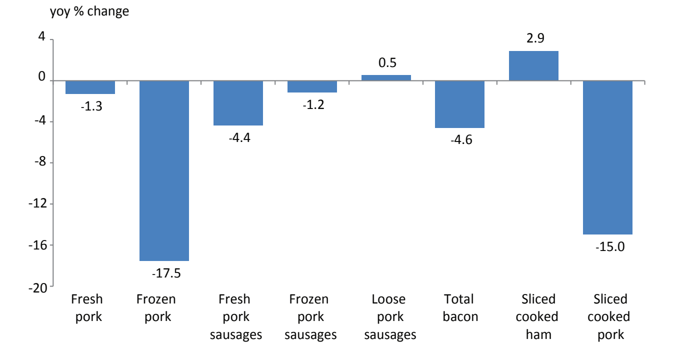
All data in carcase weight equivalent.
Source: AHDB MI calculations based on data from Defra, HMRC, ONS

Figure 7.1 Trends in GB household pork purchases by volume



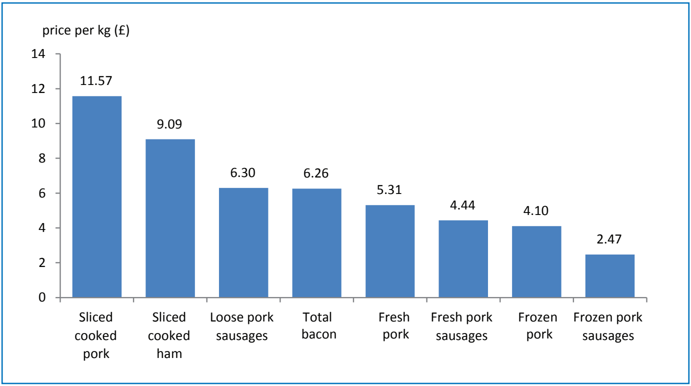
Source: Kantar WorldPanel

Figure 7.2 Change in GB retail volume sales of pig meat products, 2013



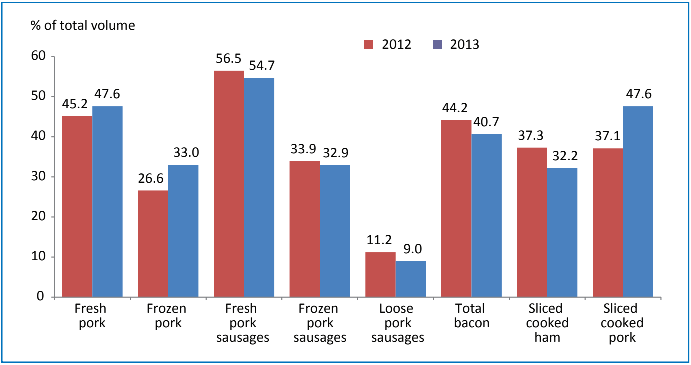
Data covers 52 weeks ended 2 February 2014.
Source: Kantar WorldPanel

Figure 7.3 Average GB retail price of pig meat products, 2013



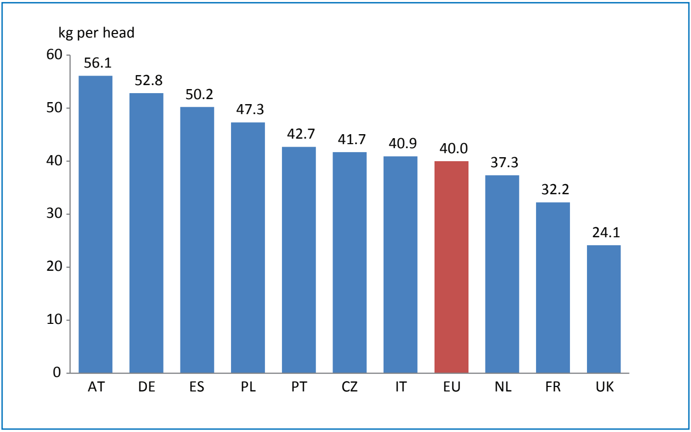
Data covers 52 weeks ended 2 February 2014.
Source: Kantar WorldPanel

Figure 7.4 Share of pork products on promotion in GB retail outlets



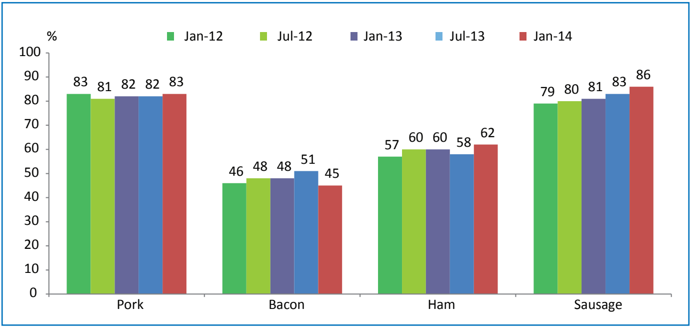
Data covers 52 weeks ended 2 February 2014.
Source: Kantar WorldPanel

Figure 7.5 Per capita consumption of pig meat in selected EU Member States, 2013



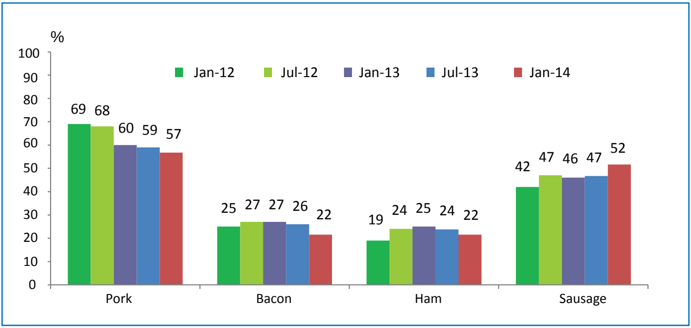
Source: AHDB/BPEX calculations using data from Eurostat

Figure 7.6 Percentage of product facings with British logo sold in the total GB market



Source: AHDB/ESA

Figure 7.7 Percentage of product facings with Red Tractor quality standard mark sold in the total GB market



Source: AHDB/ESA

Chapter 8 – Pig carcase classification data

The Meat and Livestock Commercial Services Independent Authentication Service

John Messenger, Quality Manager

The information provided by MLCSL's Pig Carcase Authentication Service is used widely as the basis for transactions between producers and slaughterers. The current service, which is UKAS Accredited, incorporates all of the mandatory requirements of the EU Pig Carcase Grading Scheme, which was introduced in GB in 2010. The service provides pig slaughterers with technically trained MLCSL staff who independently establish all of the important criteria for trade between pig suppliers and abattoirs.

The Service Includes

Identification – Carcases are individually serial-numbered and the slap marks are read and recorded to identify each consignment of pigs. The Pigs (Records, Identification and Movement) Order 2003 requires all pigs going to slaughter to be identified by a Defra allocated herdmark on both shoulders. This must be legible before and after slaughter to allow correct tracing of the pigs for both payment and biosecurity.

Weighing – Carcases are individually weighed. Hot weights are recorded, with hot weight rebates and dressing coefficients deducted to establish the payment weight. Regular scale and tare checks form an integral part of the service. Mature boars and sows are not covered by the mandatory scheme but a weighing service is available as part of the Authentication Service.

Backfat measurement and lean meat percentage – MLCSL classifiers are trained to operate all of the approved classification equipment.

Methods and Probes

MLCSL offers all methods of pig carcase classification for the prediction of lean meat percentage in accordance with EU legislation. Each method involves taking carcase measurements with EU approved equipment at specified positions on each carcase.

The following equipment is approved for use in the UK:

- Optical Probe
- Hennessey Grading Probe (HGP)
- Fat-O-Meater (FOM)
- AutoFOM
- CSB Ultra-Meater

The HGP, FOM, AutoFOM and CSB Ultra-Meater are all automatic recording probes.

Method 1
Optical Probe is used to measure backfat and rind thickness at the P1 and P3 positions, level with the head of the last rib. The probe is inserted 4.5cm and 8cm from the dorsal midline respectively. The sum of the P1 and P3 measurements is recorded.

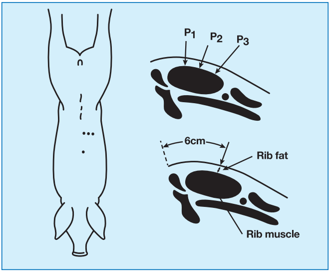
Method 2
Optical Probe is used to measure backfat and rind thickness at the P2 position, level with the head of the last rib. The probe is inserted 6.5cm from the dorsal midline.

Method 3
HGP or FOM are used to measure:

- Backfat and rind thickness at the P2 position as for Method 2. The HGP or FOM probes are inserted 6cm from the dorsal midline.

- Backfat and rind thickness at a point 6cm from the dorsal midline between the third and fourth last rib. This measurement is referred to as rib fat.
- Longissimus dorsi (eye muscle) depth at a point 6cm from the dorsal midline between the third and fourth last rib. This measurement is referred to as rib muscle.

Figure 8.1 Locations of probing sites on a pig carcase



Lean Meat Percentage and EU Grade

Lean meat percentage is calculated as follows:

Optical probe
Cold carcase weight and P2 (or P1 + P3) fat depths are used to estimate lean meat percentage.

An EU grade can be allocated to a carcase by using the lean meat percentage figure.

Lean meat percentage	EU grade
60% and above	S
55-59%	E
50-54%	U
45-49%	R
40-44%	O
39% or less	P

Visual Appraisal

This is the identification of pigs with carcase faults. These are described as “Z” carcases. Carcases that are scraggy, deformed, blemished, pigmented and coarse skinned, those with soft fat or pale muscle and those devalued by being partially condemned are recorded as “Z” on the carcase record (PCC1 or computer equivalent). Young boars are identified and recorded. Carcases with poor conformation are recorded as “C” carcases at the request of the abattoir.

Dressing Specification

Carcase dressing specifications are closely monitored by MLCSL staff and provide a vital element of the carcase record.

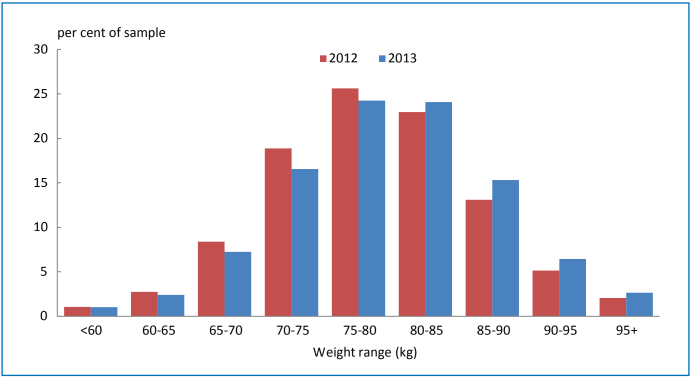
Classification Consistency

To ensure consistency of pig carcase classification standards by MLCSL staff, various procedures are strictly applied to the operation of the scheme. Extensive training programmes, both in-plant and centrally, ensure that classifiers maintain the required standards of proficiency. Classifiers are checked regularly by Divisional Managers and nominated checkers on a local basis, with the Quality Manager providing a GB link.

Each check requires the manager/checker separately to classify and record 20 carcases. The classification measurements assessed by the classifier are then checked against the manager’s measurements and an analysis of accuracy levels for the 20 carcases is made. This analysis measures both bias (the tendency of a classifier to measure higher or lower classifications than the checker) and consistency (the overall level of agreement between classifier and checker).

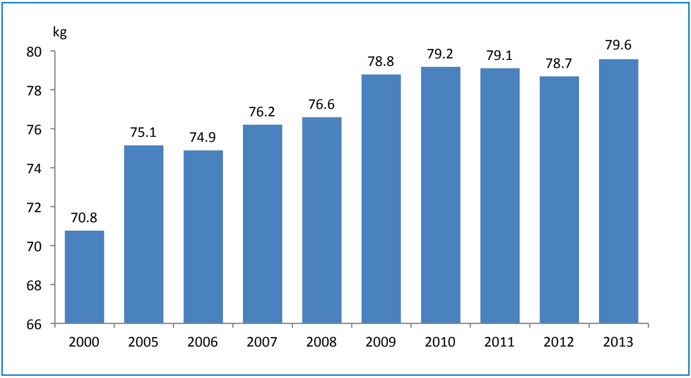
All checks are analysed at MLCSL’s HQ to ensure classifiers are meeting accuracy levels.

Figure 8.2 Distribution of the GB classified sample by carcase weight



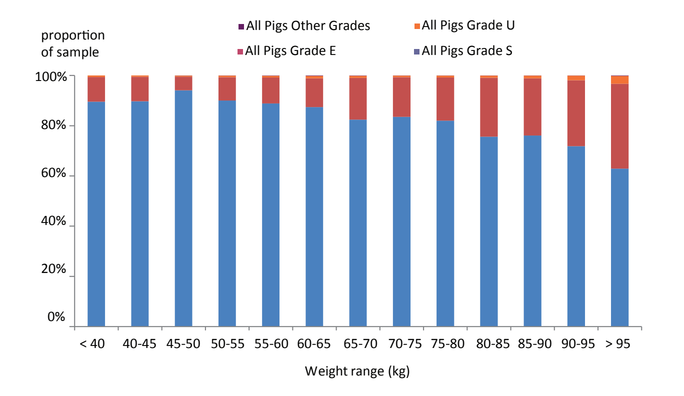
Source: AHDB/MLCSL

Figure 8.3 Average carcase weights of the GB collected sample



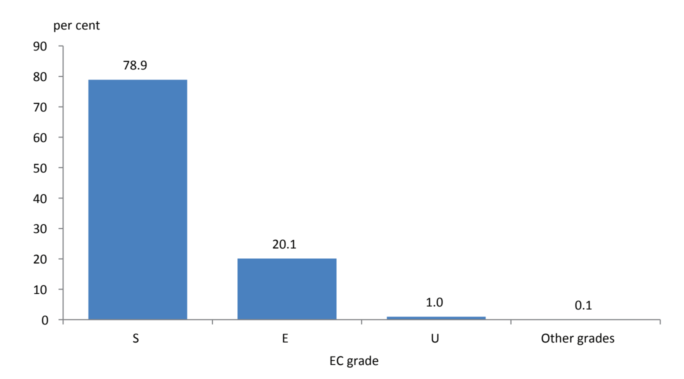
Source: AHDB/MLCSL

Figure 8.4 Distribution of the GB classified sample in EC grade by weight band, 2013



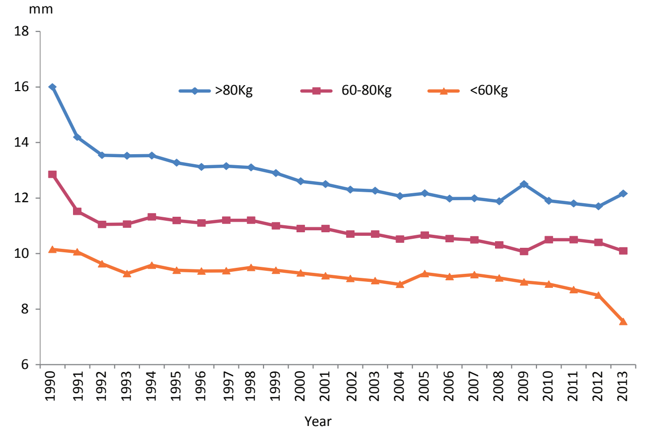
Source: AHDB/MLCSL

Figure 8.5 Distribution of the GB classified sample by EC grade, 2013



Source: AHDB/MLCSL

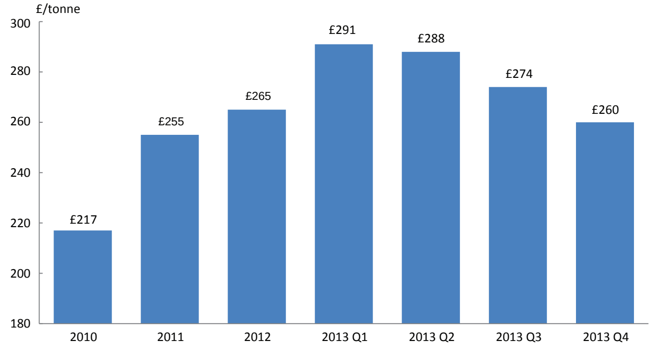
Figure 8.6 Trends in P2 fat depth



Source: AHDB/MLCSL

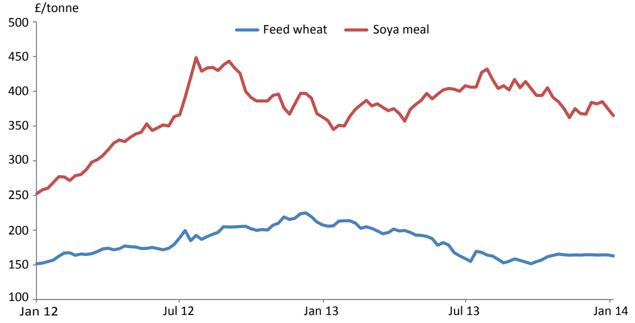
Chapter 9 – Feed prices

Figure 9.1 Average pig compound feed prices, GB



Source: Defra

Figure 9.2 Feed wheat and soya meal prices



Source: AHDB/HGCA

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