



**BPEX ANNUAL PIG MEAT
INDUSTRY SURVEY 2015
REPORT**

Prepared for



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SECTION I. INTRODUCTION

I.1 Background

Promar International was commissioned by BPEX to provide consultancy support for the completion of the BPEX postal and online Annual Confidence Survey 2015. This is the fourth year in which Promar have been involved with the survey.

The objective for conducting this survey was to take a snapshot of the sector and to assess the performance of BPEX. Additional objectives include measuring confidence in the industry and to identify potential areas where BPEX can improve performance.

The annual confidence survey has been conducted by BPEX since 2007.

I.2 Methodology

The confidence survey was issued by post to key stakeholders and businesses within the English Pork Sector including:

- Producers
- Processors
- Allied Industries (AIG)
- Vets

In total, the survey was distributed to 650 contacts during the end of December 2014.

A reminder letter encouraging respondents to complete the survey was posted to contacts where no response had been received during the week commencing 26th January 2015.

In addition to postal copies, a link to the questionnaire was provided on the BPEX website for online completion.

The survey was closed on Friday 20th February 2015, with no further responses included in the analysis of results. As of this date **198 responses** had been received.

Of this total, 52 responses were recorded through the online survey, accounting for 26% of the total response number. In 2014, online responses were similar at 51, but remarkably higher than 2013's total of 7.

Some of the postal and online questionnaires were not fully completed by respondents. The results for individual questions are analysed by the number of responses to that question rather than the total number of respondents.

The following response rates were achieved in the 2015 survey:

Figure 1: Response rates 2015

	Number Issued	Number returned without completion	Revised Number Issued	Number of Responses			Response Rate
				Postal	Online	Total	
Total Responses	650	13	637	146	52	198	31%
Producer	540	11	529	127	33	160	30%
Processor	10	0	10	0	5	5	50%
AIG	50	1	49	11	8	19	39%
Vet	50	1	49	8	6	14	29%

The overall response rate was 31%. This compares with 33% in 2014, 27% in 2013, 25% in 2012, 20% in 2011, 19% in 2010, and 18% in 2009.

13 surveys were returned uncompleted, this was either because the contact felt the survey was not relevant to them or incorrect contact details were provided.

The response rate for *processors* is high at 50%, however, it is important to remember that this only represents a sample of 5. As such these results may be less statistically robust than those for other sectors.

In terms of the location of respondents there was a fairly even split between those in the East and North. 31% of respondents were located in the East of the UK, whilst 29% were located in the North. Three respondents failed to identify in which part of the country they were located.

Figure 2: Responses by region 2015

	North	Central	South	East
Total Responses	58	34	41	62
Producer	46	27	35	49
Processor	2	1	1	1
AIG	7	5	1	6
Vet	3	1	4	6

SECTION 2. EXECUTIVE SUMMARY

2.1 The Market

Producers within the pork sector have seen their confidence levels (related to investments in buildings) fall over the last year whilst levels for non producers remained stable over the same period. This indicates that there has been an overall fall in the sector's confidence levels this year.

Optimism levels also fell in the latest results from a positive balance in 2014 to its current negative level in 2015. Despite the fall, balances are still not as low as those seen in 2011.

Stakeholders undertaking capital expenditure on buildings over the coming years continue to be driven by replacement requirements, and a need to increase efficiency and productivity. These two factors have been the main driving force behind investment in the sector over the past few years.

An inadequate return on investment in the sector, a shortage of internal finance and an uncertainty about demand continue to be the main factors discouraging stakeholders from making investments over the coming 12 months.

Domestic competitiveness in the UK pork sector has not improved over the last 12 months, neither has competition with EU businesses. Over this period more respondents felt that their situation had in fact worsened. This indicates that there is a current negative competitive view of the sector in both the UK and EU.

Looking ahead, over the next 12 months the competitive situation within the UK and EU pork sector is set to improve, although not to the same degree as seen in the previous year. Competitiveness against EU businesses is set to be relatively equal in balance over the year, with fairly balanced numbers of respondents believing that the situation would improve/worsen.

The main factor to limit output over the next year continues to be finishing accommodation. Other key factors are orders or sales, and breeding accommodation.

Price confidence in the sector has fallen to a negative balance in the latest data. This is as a result of a higher number of respondents believing that their selling price has fallen in recent months. The overall fall in price confidence comes after three years of increased confidence within the sector.

2.2 BPEX Services

The latest data indicates that there was a fall in the number of respondents using BPEX services in comparison with the previous year.

For respondents not using BPEX services the main reason was because they preferred to use alternative sources of information. Respondents were also not sure as to who was best to contact in BPEX in relation to their queries. The anticipated use of BPEX services though is set to increase over the next year.

MI service satisfaction was high amongst respondents with the most satisfaction attributed to prices, facts and figures. In terms of BPEX services, all factors, (with the exception of friendliness and helpfulness which remained stable) saw a high satisfaction level, but to a lower degree than the previous year. The friendliness and helpfulness of BPEX was ranked as the leading satisfaction factor amongst respondents. BPEX's ability to clearly communicate was ranked as the factor with the least level of satisfaction and something to be improved upon in the future.

The most frequently used BPEX services were:

- BPEX website
- Publications, factsheets and technical guides
- Events and meetings
- Website, prices, facts and figures

Over the next 12 months, the website is set to continue to be the most used BPEX service, alongside publications, factsheets and technical guides, and events and meetings.

Awareness of BPEX's services were highest amongst the text alerts provided for meetings and disease outbreaks and the pig price data. In comparison, actual usage of services was highest for the Pig Farmer insert and pig price data.

There was a fairly even split in terms of those respondents who felt that BPEX had positively influenced them to make a change to their business.

SECTION 3. CONFIDENCE SUMMARY

There are numerous ways of measuring confidence, but this report uses the formula historically used in past BPEX reports. This is based on the assumption that a confident person is more likely to invest in the business than one who is not confident. The overall confidence indices in this survey are based on question 2. This is the question that relates to capital investment in buildings over the next 12 months.

There is no reason why confidence levels should be the same at different stages of the pig meat marketing chain, as profit margins will be influenced by a differing mix of factors. The output of the producer sector will also be the input of some of the other sectors. The industry survey shows one confidence index for producers and one for other businesses.

Assigning the number +1 to more investment, -1 to less investment and 0 to no change, the total industry confidence level in the current period is calculated by:

$$\text{Confidence Index} = (\text{Previous year index} * (100 + \text{more\%} - \text{less\%}))/100$$

Figure 3: Confidence index

Confidence Index	More Confident	No Change	Less Confident	Confidence Index				
				2015	2014	2013	2012	2011
Producers	24%	37%	39%	18.9	22.2	17.6	25.5	30.2
Non Producers	29%	43%	29%	146.4	146.4	102.4	117.7	92.2

The confidence index has fallen in 2015 for producers by 3.3 points to reach 18.9. The fall is due to a higher number of producers this year having less confidence in the sector. 39% of producers are now less confident, compared with 17% in the 2014 survey results.

The non producer confidence index has remained at the same level as last year at 146.4 – the highest index over the last five years. The stability is due to an equal number of respondents feeling more and less confident in the sector.

SECTION 4. INDUSTRY CONFIDENCE

4.1 Industry Confidence: Optimism

Q1. Are you more or less optimistic than you were a year ago about the financial situation in your part of the pig sector?

In 2015, the net optimism balance was negative at -52%. This indicates that respondents are less optimistic about the financial situation in the pig sector in comparison with 2014's results where the balance was positive at 53%.

The change in balance is as a result of a lower number of respondents feeling optimistic in the sector (6% in 2015, compared to 57% in 2014), and a greater number feeling less optimistic (58% in 2015 compared to 4% in 2014).

Despite the negative balance it is still not as low as the level seen in 2011 at -65%.

Net optimism balances for all categories were negative in 2015, with the balance the lowest for *producers* at -56%, (lower than the overall average of -52%).

In 2014 all net optimism balances were positive: *producers* at 52%, *processors* at 75%, *AIG* at 75%, and *vets* at 42%. This indicates that those in the pig sector have faced tougher financial difficulties over the last 12 months in comparison with previous years.

Figure 4: Optimism by sector 2015

Sector	Base	Optimism 2015			Net Optimism
		More	Same	Less	
Base	180	10	66	104	-52.2%
		5.6%	36.7%	57.8%	
Producer	148	8	49	91	-56.1%
		5.4%	33.1%	61.5%	
Processor	3	0	2	1	-33.3%
		0.0%	66.7%	33.3%	
AIG	17	2	6	9	-41.2%
		11.8%	35.3%	52.9%	
Vet	12	0	9	3	-25.0%
		0.0%	75.0%	25.0%	

Figure 5: Optimism by sector 2015

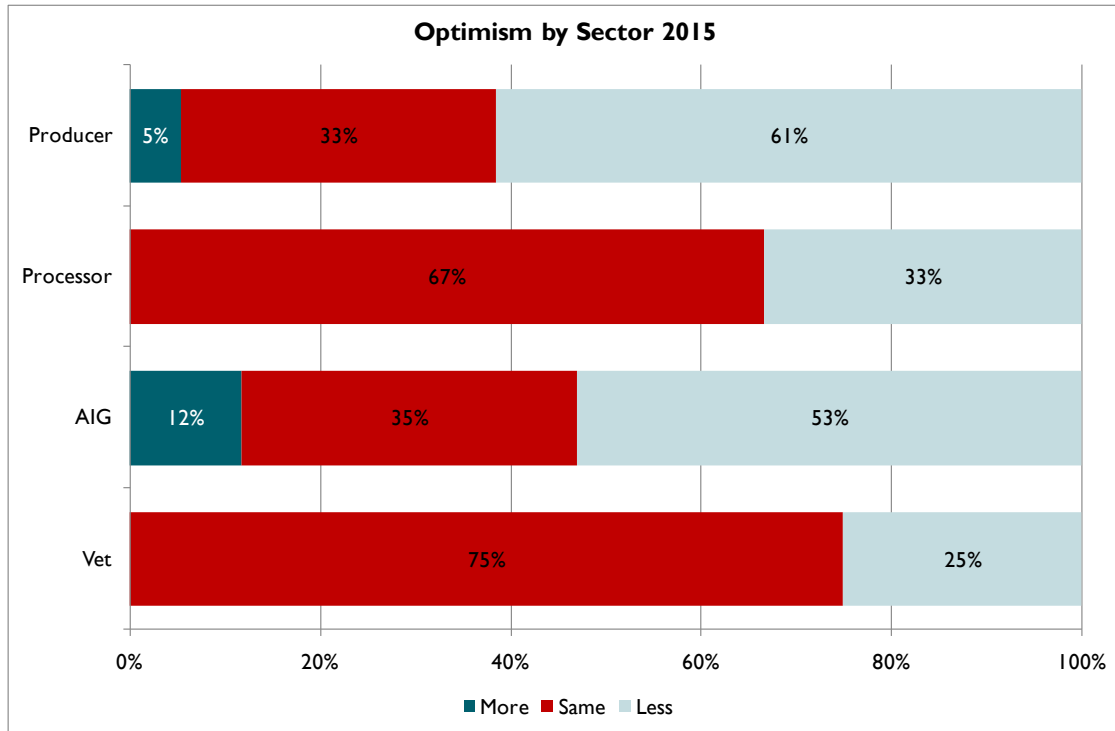
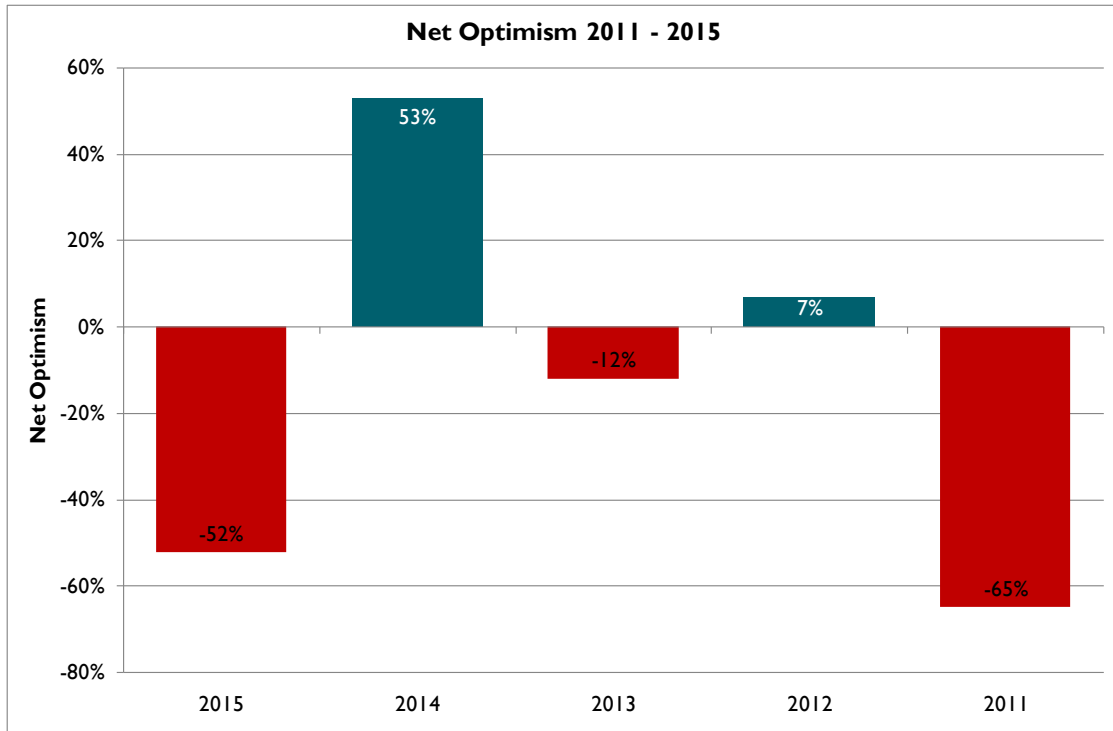


Figure 6: Optimism 2011 – 2015

Optimism	2015		2014		2013		2012		2011	
	% of Respondents	Net Optimism	% of Respondents	Net Optimism	% of Respondents	Net Optimism	% of Respondents	Net Optimism	% of Respondents	Net Optimism
More	6%		57%		16%		22%		7%	
Same	37%	-52%	40%	53%	56%	-12%	64%	7%	21%	-65%
Less	58%		4%		28%		15%		72%	

Figure 7: Optimism 2011 – 2015



4.2 Industry Confidence: Investment in Buildings

Q2. How much capital investment on buildings do you expect in 2015 compared to 2014?

The net optimism balance, in relation to investment in buildings was -13% in 2015. This indicates a fall in optimism from 2014 when the balance was positive at 29%.

The percentage of respondents that were more optimistic about building investment in 2015 was 24%, this was almost half the number of the previous year when 44% were more optimistic. However, the 2015 figure aligns better with previous year's results of 26% in 2013 and 25% in 2012. This perhaps indicates that although optimism has fallen, 2014 may have been an anomaly rather than a trend.

Those respondents in the *producer* sector had a net optimism balance of -14% in 2015, a fall from 2014's positive 26% level. A negative balance was also seen for *AIGs* at - 20%, this compares with 33% previously.

The *processor* category was the only one to see a positive balance. Net optimism levels were balanced at 50%. However, this was based on a total of two respondents answering this question.

No *vets* responded to this question. In 2014 the net optimism balance for *vets* was 22%.

Figure 8: Investment in buildings by sector 2015

Sector	Base	Investment in Buildings 2015			Net Optimism
		More	Same	Less	
Base	142	35	53	54	-13.4%
		24.6%	37.3%	38.0%	
Producer	135	33	50	52	-14.1%
		24.4%	37.0%	38.5%	
Processor	2	1	1	0	50.0%
		50.0%	50.0%	0.0%	
AIG	5	1	2	2	-20.0%
		20.0%	40.0%	40.0%	
Vet	0	0	0	0	N/A
		0.0%	0.0%	0.0%	

Figure 9: Investment in buildings by sector 2015

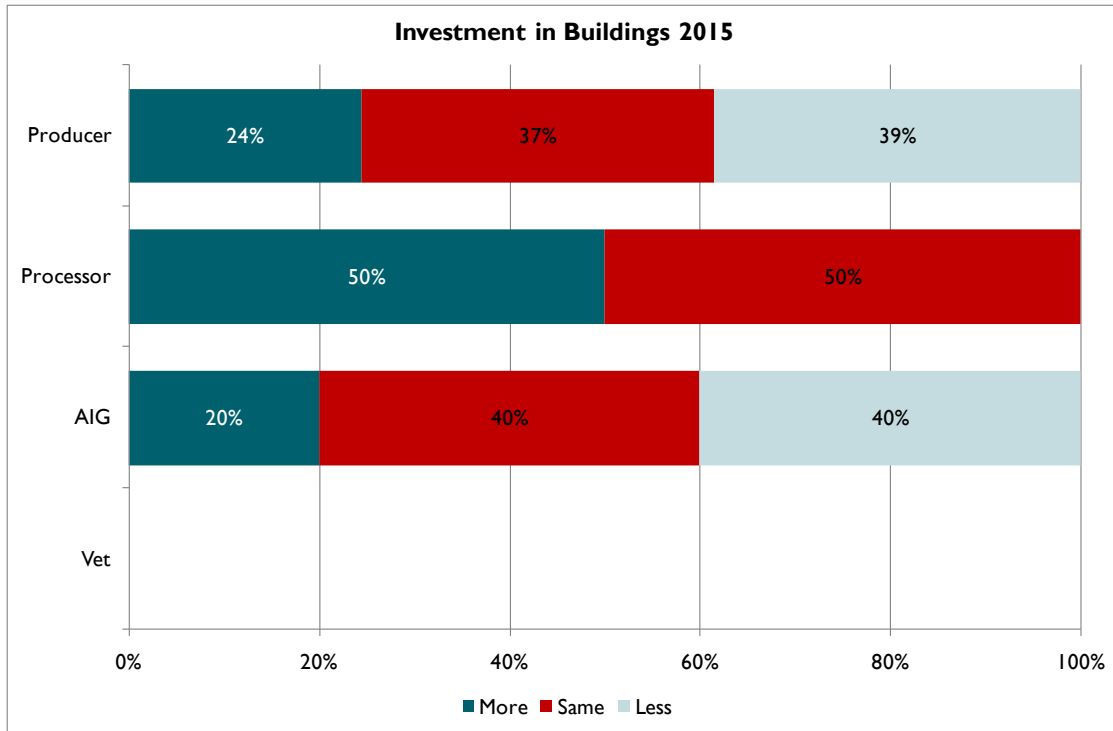
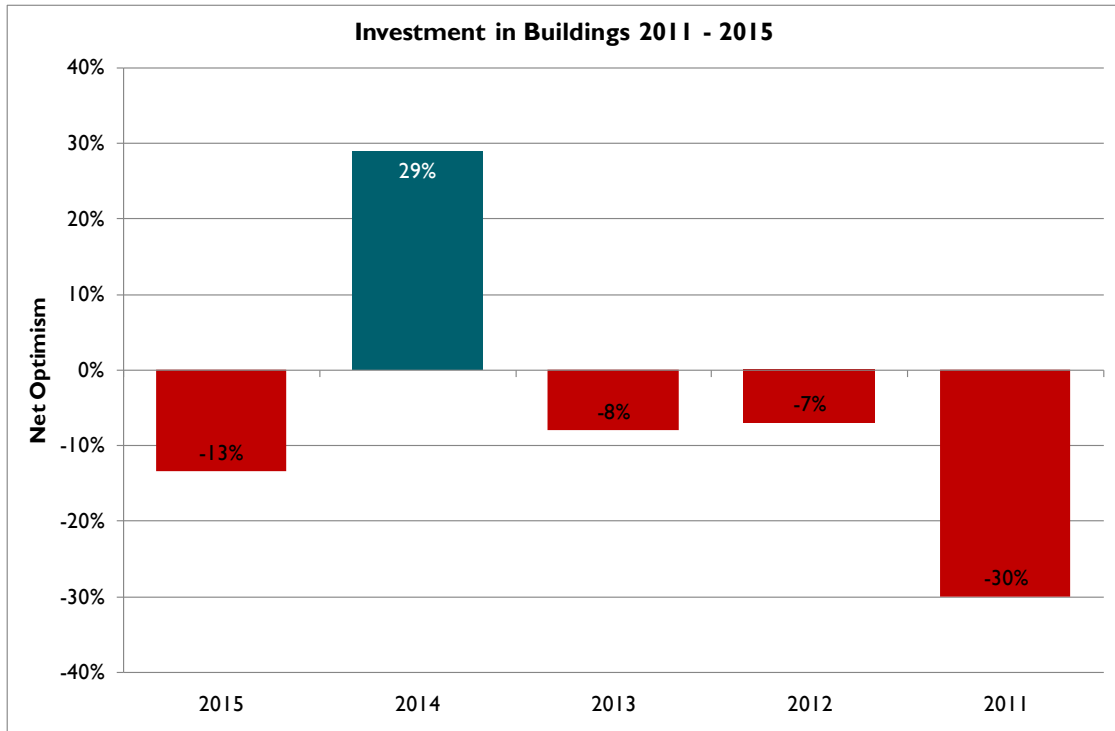


Figure 10: Investment in buildings 2011 – 2015

Optimism	2015		2014		2013		2012		2011	
	% of respondents	Net Optimism	% of respondents	Net Optimism	% of respondents	Net Optimism	% of respondents	Net Optimism	% of respondents	Net Optimism
More	25%		44%		26%		25%		23%	
Same	37%	-13%	40%	29%	40%	-8%	43%	-7%	23%	-30%
Less	38%		15%		34%		32%		53%	

Figure 11: Investment in buildings 2011 – 2015



4.3 Industry Confidence: Capital Expenditure

Q3. What are the main reasons for any capital expenditure on buildings, plant or machinery during 2015?

The main reason for capital expenditure on buildings, plant or machinery in 2015 was for replacement purposes. 34% of respondents ranked this as an important factor for their future investment plans, a similar level to those who felt the same in 2014 at 36%.

Having the ability to increase efficiency and or productivity was also ranked highly as an important factor by 29% of respondents. Over the last four years, these two factors have been ranked as the main influencers on future investment plans concerned with buildings, plant or machinery.

The importance of increasing production capacity as a reason for capital expenditure rose in 2015, with 22% of respondents ranking this as important in comparison with 17% in 2014.

Other responses provided included:

- Repair purposes
- To improve welfare standards
- For refurbishment

Figure 12: Reasons for capital expenditure by sector 2015

Reasons for capital expenditure	Total	Sector			
		Producer	Processor	AIG	Vet
Base	233	211	5	13	4
To increase production capacity	52	46	2	3	1
	22.3%	21.8%	40.0%	23.1%	25.0%
To increase efficiency / productivity	68	59	2	6	1
	29.2%	28.0%	40.0%	46.2%	25.0%
For replacement	80	75	1	3	1
	34.3%	35.5%	20.0%	23.1%	25.0%
To comply with environmental	24	22	0	1	1
	10.3%	10.4%	0.0%	7.7%	25.0%
Other	9	9	0	0	0
	3.9%	4.3%	0.0%	0.0%	0.0%

Figure 13: Reasons for capital expenditure by sector 2015

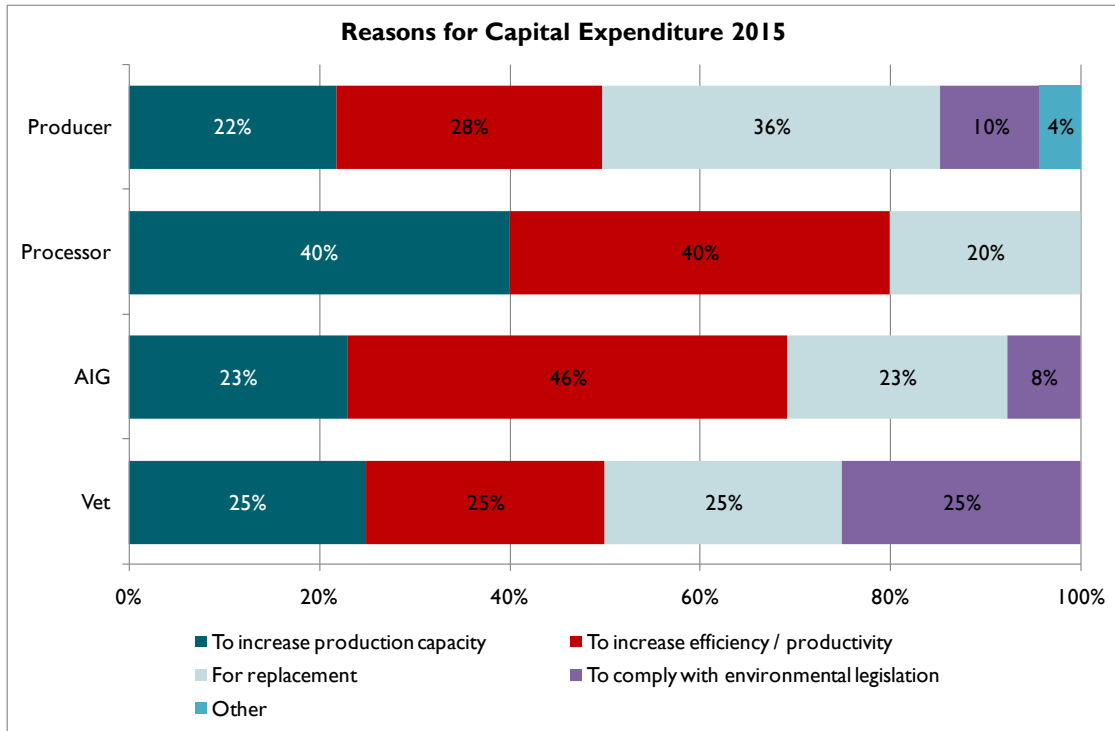
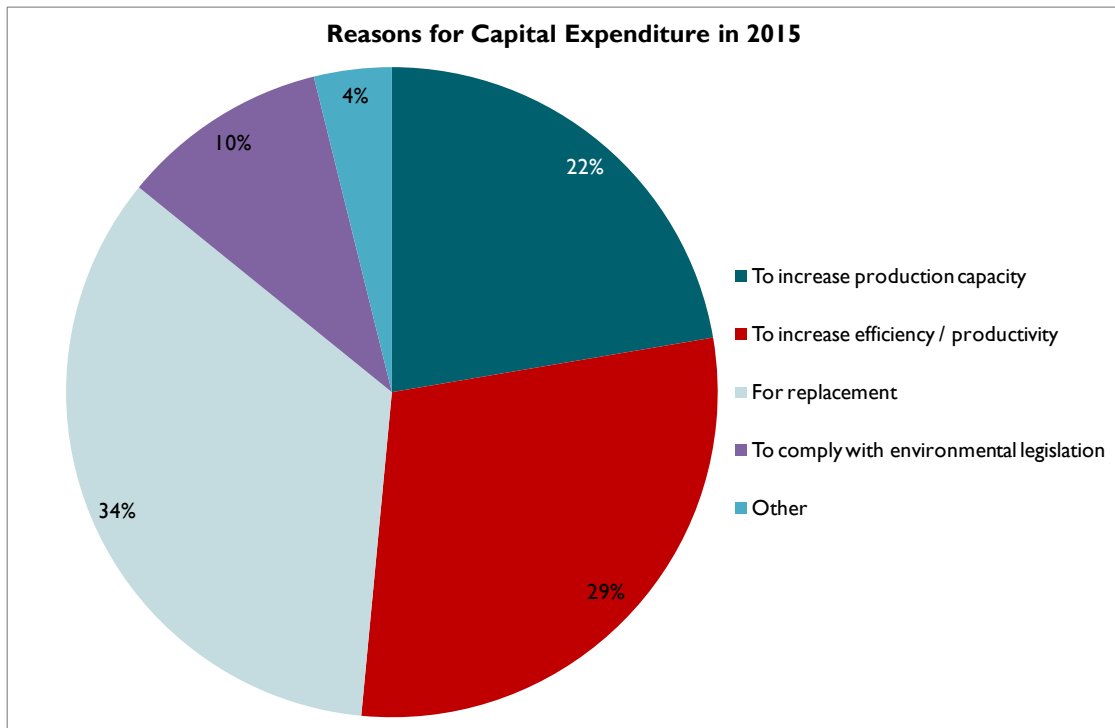


Figure 14: Reasons for capital expenditure 2015



4.4 Industry Confidence: Factors Limiting Capital Investment

Q4. What factors are likely to limit your capital investment in 2015?

As with previous years, the main factors set to limit respondent's capital investment in 2015 are an inadequate return on investment, shortage of internal finance, and uncertainty about demand.

31% of respondents believed that an inadequate return on investment was a limiting factor. This percentage has fallen from 33% in 2014 and 39% in 2013, indicating that although the factor still remains significant to respondents there is an overall fall in its relative importance.

Respondents ranking a shortage of internal finance or uncertainty about demand as important factors have increased this year. 23% of respondents selected internal finance, slightly higher than the 22% of respondents which ranked it as important in 2014. Those believing that uncertainty of demand was important increased from 17% in 2014 to 22% in 2015.

The inability to raise external finance and having a shortage of labour were seen as the least limiting factors on capital investment with 10% of respondents ranking these.

Other reasons respondents provided for limited capital expenditure include:

- Plans for retirement
- Planning limitations on land
- Outstanding previous capital investment projects
- Uncertainty of future
- Disease risk such as PEDv
- Confirming to EA regulations
- No need for future investment at present

Figure 15: Factors likely to limit capital investment by sector 2015

Reasons for capital expenditure	Total	Sector			
		Producer	Processor	AIG	Vet
Base	259	228	10	16	5
Inadequate return on investment	79	71	2	5	1
	30.5%	31.1%	20.0%	31.3%	20.0%
Shortage of internal finance	59	53	2	3	1
	22.8%	23.2%	20.0%	18.8%	20.0%
Inability to raise external finance	27	22	2	2	1
	10.4%	9.6%	20.0%	12.5%	20.0%
Uncertainty about demand	56	52	1	2	1
	21.6%	22.8%	10.0%	12.5%	20.0%
Shortage of labour, including managerial and technical staff	25	18	2	4	1
	9.7%	7.9%	20.0%	25.0%	20.0%
Other	13	12	1	0	0
	5.0%	5.3%	10.0%	0.0%	0.0%

Figure 16: Factors likely to limit capital investment by sector 2015

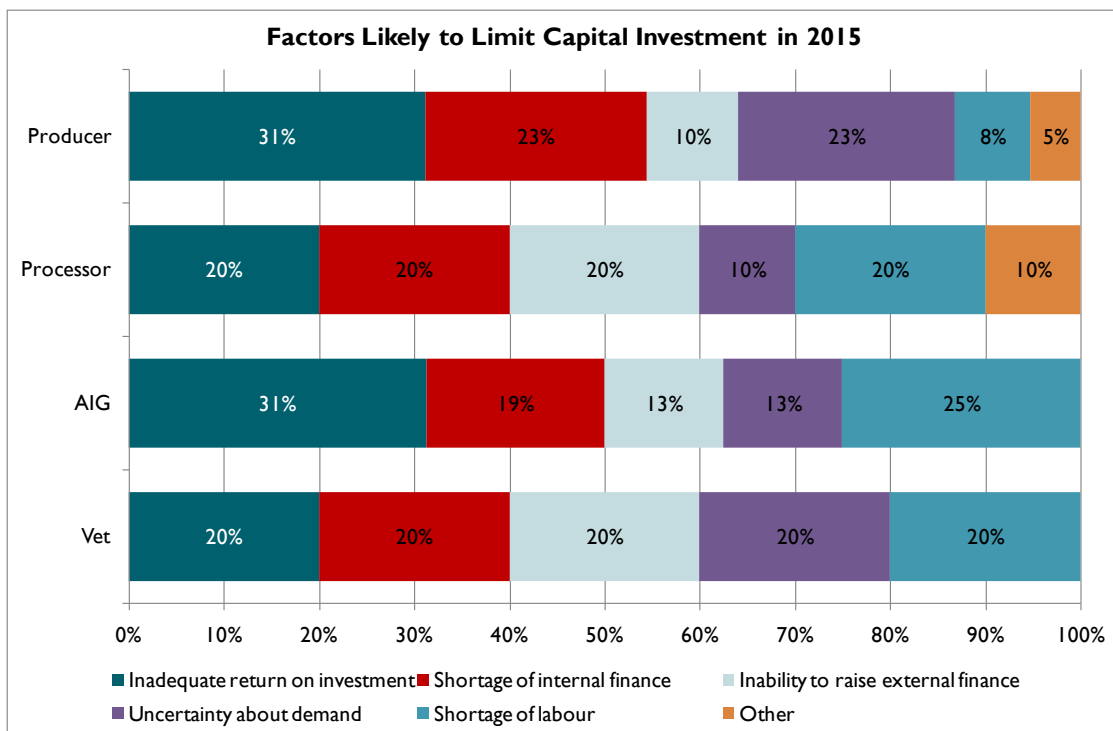
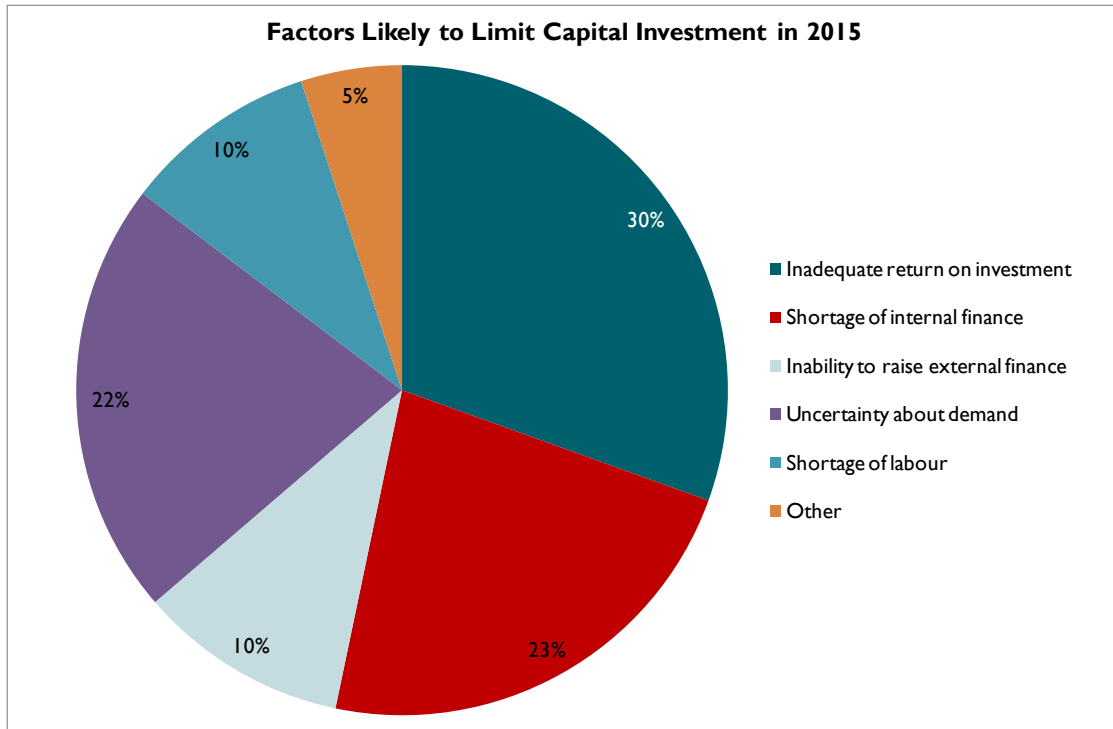


Figure 17: Factors likely to limit capital investment 2015



4.5 Industry Confidence: Competitiveness

Q5a. How would you rate your competitiveness relative to other UK and EU businesses over the past 12 months?

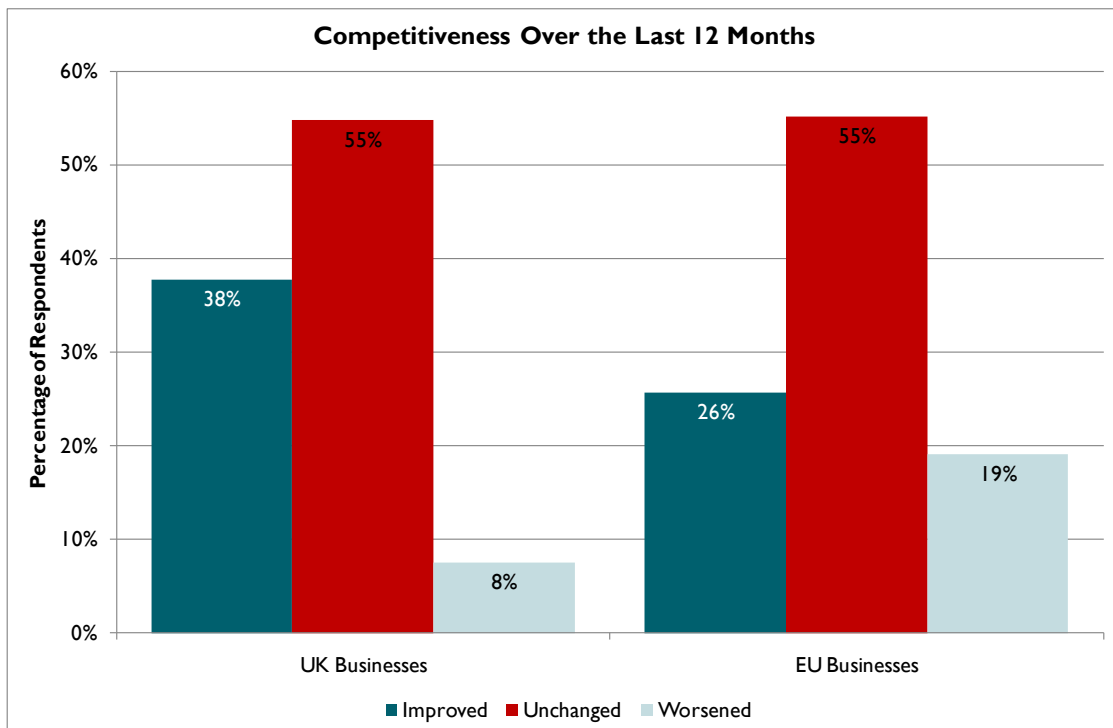
Respondents were asked to rate their competitiveness over the last 12 months in comparison with both UK and EU businesses. 38% of respondents believed that their situation had improved against other UK businesses, whilst 26% believed competitiveness had improved in comparison with other EU businesses.

Both of these figures are lower than the levels seen in 2014, when 43% believed there was an improved situation against UK businesses and 30% against those in the EU. The fall in competitiveness may be linked with the lower confidence felt within the industry this year.

The number of respondents who believed their situation had worsened against those in the UK had doubled from 4% in 2014 to 8% in 2015, whilst a worsened situation against EU businesses increased from 16% in 2014, to 19% in 2015.

These results indicate competitiveness in both the domestic and EU market although positive has worsened over the last 12 months.

Figure 18: Competitiveness over the last 12 months – UK and EU businesses



UK: How would you rate your competitiveness relative to other UK businesses over the past 12 months?

The net competitiveness balance for respondents asked to rate their business in comparison with other UK businesses over the last 12 months was 30%. This was a fall from last year's balance of 39%, however still an increase on previous year's totals of 16% in 2013 and 25% in 2012.

The only sector to see an increase in their balance was the *processors* with 100% of respondents believing that their competitiveness has improved against other UK businesses. However this is based on just three respondents.

Producer competitiveness balance fell from 39% in 2014 to 29% in 2015. In this sector 37% of respondents believed that their business situation had improved whilst 8% felt that their situation had worsened.

The *AIG* sector was the most positive (excluding the processor results), with 54% of respondents believing that their situation had improved in the last 12 months. This resulted in a net competitiveness balance of 46%.

All six respondents for the *vet* sector felt that their UK business situation had remained unchanged over the last 12 months resulting in a neutral competitiveness balance of 0%.

Figure 19: Competitiveness over the last 12 months – UK businesses

Sector	Base	UK Businesses - Last 12 Months			Net Competitiveness
		Improved	Unchanged	Worsened	
Total	159	60	87	12	30.2%
		37.7%	54.7%	7.5%	
Producer	137	50	76	11	28.5%
		36.5%	55.5%	8.0%	
Processor	3	3	0	0	100.0%
		100.0%	0.0%	0.0%	
AIG	13	7	5	1	46.2%
		53.8%	38.5%	7.7%	
Vet	6	0	6	0	0.0%
		0.0%	100.0%	0.0%	

EU: How would you rate your competitiveness relative to other EU businesses over the past 12 months?

When respondents were asked to rate their competitiveness against other EU businesses, the overall balance was positive at 7%. However, this was half the balance value seen in 2014 at 14%, but still higher than the negative balance seen in 2013 of -5%.

All sectors saw their average balance fall against 2014 levels indicating that respondents believed that their competitive business situation in the EU is worsening.

25% of *producers* believed that their business situation had improved against those in the EU, whilst 21% felt the situation had worsened. This resulted in a balance of 4%, compared with a rate of 9% in 2014.

Strong competitive balances were seen by those in the *processor* and *AIG* sectors at 33% and 27% respectively in 2015. However in 2014 these balances were significantly higher for *processors* at 75% and 31% for *AIG*.

Six vets responded to this question with all believing that their competitiveness over the last 12 months was unchanged in comparison with other EU businesses. The same result as against UK businesses.

Figure 20: Competitiveness over the last 12 months – EU businesses

Sector	Base	EU Businesses - Last 12 Months			Net Competitiveness
		Improved	Unchanged	Worsened	
Total	136	35	75	26	6.6%
		25.7%	55.1%	19.1%	
Producer	116	29	63	24	4.3%
		25.0%	54.3%	20.7%	
Processor	3	2	0	1	33.3%
		66.7%	0.0%	33.3%	
AIG	11	4	6	1	27.3%
		36.4%	54.5%	9.1%	
Vet	6	0	6	0	0.0%
		0.0%	100.0%	0.0%	

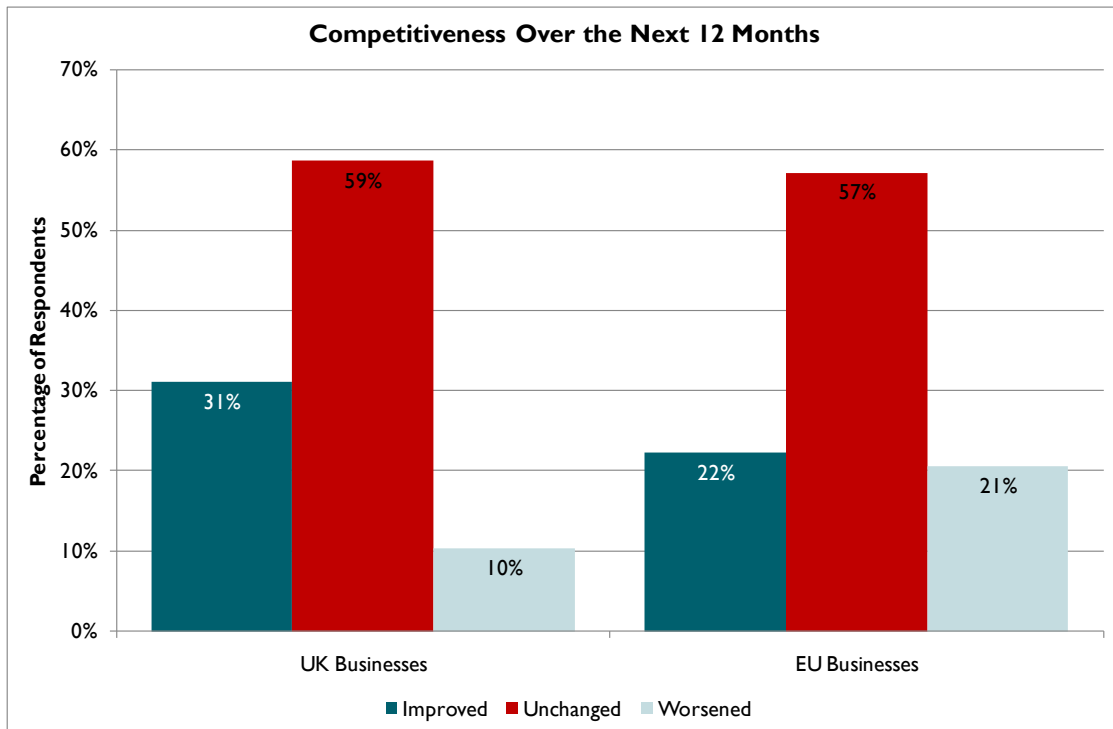
Q5b. How would you rate your competitiveness relative to other UK and EU businesses over the next 12 months?

Respondents believed that their competitiveness against other UK businesses over the next 12 months is going to improve, rather than worsen albeit at a lower level of improvement compared to last year. In 2015 31% of respondents expected to see an improvement, this compares to 49% in 2014.

The same situation occurs when considering competitiveness against EU businesses. 22% of respondents felt that this year their situation would improve, but this is lower than the 31% who felt the same in 2014.

Overall respondents believed that they were more likely to face stiffer competition from those in the EU rather than domestically based UK businesses. 21% of respondents felt their competitive situation would worsen against EU companies over the next 12 months, whilst 10% felt the same in regards to UK businesses.

Figure 21: Competitiveness over the next 12 months – UK and EU businesses



UK: How would you rate your competitiveness relative to other UK businesses over the next 12 months?

31% of respondents believed that their competitive business situation would improve in comparison with UK businesses over the next 12 months. With 10% of respondents believing that their situation would worsen, this resulted in a net competitiveness balance of 21%. This balance, although positive, is half that of the level seen in 2014 at 42%. This indicates that respondents are positive about their position in the future, but not to the same degree as last year.

Only the *processor* sector has seen an increase in the net competitiveness balance compared with the previous year. *Processor* figures have moved from 50% to 67%, although this is based on four respondents in 2014 and three in 2015.

Competitiveness confidence within the UK sector for *producers* has fallen from 41% in 2014 to 19% in 2015. Confidence has also fallen in the *AIG* sector from 50% in 2014 to 36% in 2015.

The *vet* competitiveness balance remained neutral with respondents believing the next 12 months will remain unchanged against other UK businesses.

Figure 22: Competitiveness over the next 12 months – UK businesses

Sector	Base	UK Businesses - Next 12 Months			Net Competitiveness
		Improved	Unchanged	Worsened	
Total	145	45	85	15	20.7%
		31.0%	58.6%	10.3%	
Producer	125	39	71	15	19.2%
		31.2%	56.8%	12.0%	
Processor	3	2	1	0	66.7%
		66.7%	33.3%	0.0%	
AIG	11	4	7	0	36.4%
		36.4%	63.6%	0.0%	
Vet	6	0	6	0	0.0%
		0.0%	100.0%	0.0%	

EU: How would you rate your competitiveness relative to other EU businesses over the next 12 months?

When asked to rate their business competitiveness in comparison with other EU businesses, 22% of respondents believed that their situation would improve over the next 12 months. However, this figure is lower than 2014's average of 32%.

The overall net competitiveness balance against EU businesses is positive at 2%, but lower than 2014's balance of 10%.

The *producer* sector is the only respondent group to see a negative balance of -1%. This has been driven by lower numbers of respondents believing that their situation would improve over the next 12 months.

The competitiveness balance for vets over the next 12 months was 17% in 2015. This was a fall from the 30% balance from 2014.

The *AIG* sector has seen a slight improvement in its net competitiveness in comparison with the previous year. The balance has risen from 18% in 2014 to its current level of 20% in 2015.

The *processor* sector saw a neutral balance with equal numbers of respondents believing their situation would improve or worsen over the next 12 months in comparison to other EU businesses. However, the robustness of this data is questionable as only three processors responded to this question. In comparison, last year the sector's balance was 25%, although this was also based on a small sample of four.

Figure 23: Competitiveness over the next 12 months – EU businesses

Sector	Base	EU Businesses - Next 12 Months			Net Competitiveness
		Improved	Unchanged	Worsened	
Total	126	28	72	26	1.6%
		22.2%	57.1%	20.6%	
Producer	107	24	58	25	-0.9%
		22.4%	54.2%	23.4%	
Processor	3	1	1	1	0.0%
		33.3%	33.3%	33.3%	
AIG	10	2	8	0	20.0%
		20.0%	80.0%	0.0%	
Vet	6	1	5	0	16.7%
		16.7%	83.3%	0.0%	

4.6 Industry Confidence: Factors Limiting Output

Q6. What factors are likely to limit your output over the next 12 months?

Finishing accommodation continued to be ranked as the most important factor for respondents, in terms of what is likely to limit their output over the next 12 months at 30%. This is slightly lower than last year's 32%.

Orders or sales and breeding accommodation were both equally ranked as the next most important factors at 16% each. This was an increase in importance for orders or sales from 12% and a fall from 18% for breeding accommodation.

The least limiting factor was again raw materials with 4% of respondents believing that this was likely to limit their future output.

Other factors likely to limit output over the next 12 months include:

- Potential disease outbreaks
- Lack of gilts
- Efficiency problems
- Complying with Environmental Agency regulations
- Lack of confidence in the sector and supply chain
- Performance levels
- Skills

Figure 24: Factors likely to limit output over the next 12 months by sector

Factors likely to limit output over the next 12 months	Total	Sector			
		Producer	Processor	AIG	Vet
Base	218	186	5	17	10
Orders or sales	35	23	2	8	2
	16.1%	12.4%	40.0%	47.1%	20.0%
Labour	23	17	1	3	2
	10.6%	9.1%	20.0%	17.6%	20.0%
Breeding Accommodation	35	34	0	0	1
	16.1%	18.3%	0.0%	0.0%	10.0%
Finishing Accommodation	65	61	0	1	3
	29.8%	32.8%	0.0%	5.9%	30.0%
Finance	29	24	1	3	1
	13.3%	12.9%	20.0%	17.6%	10.0%
Raw Materials	8	4	1	2	1
	3.7%	2.2%	20.0%	11.8%	10.0%
Other	23	23	0	0	0
	10.6%	12.4%	0.0%	0.0%	0.0%

Figure 25: Factors likely to limit output over the next 12 months by sector

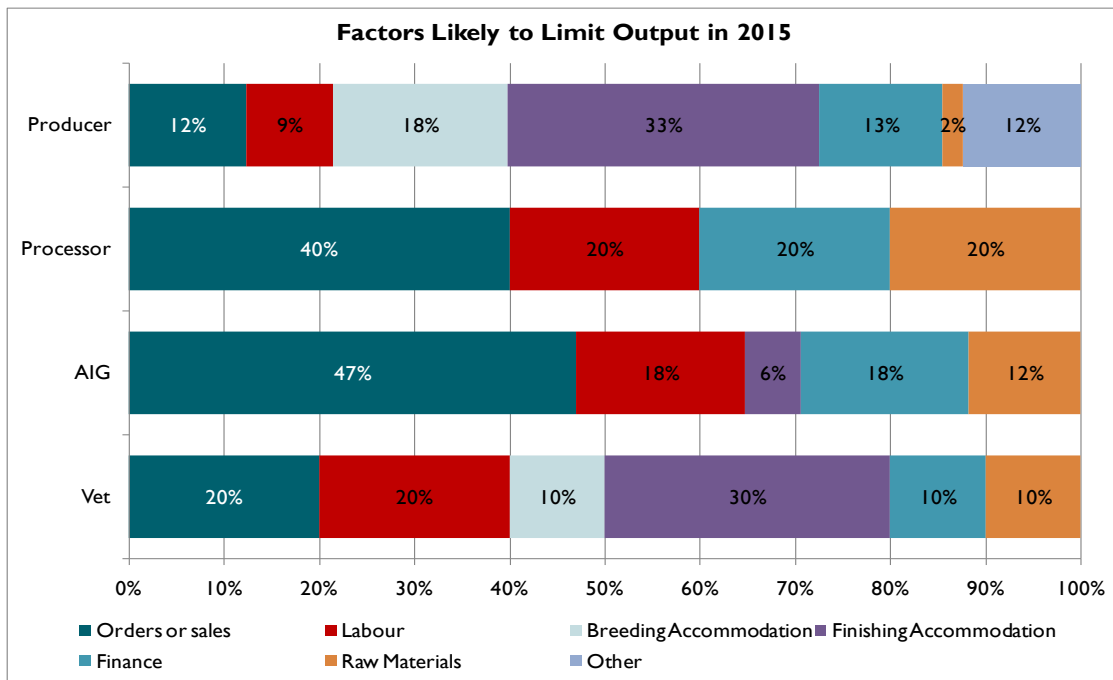
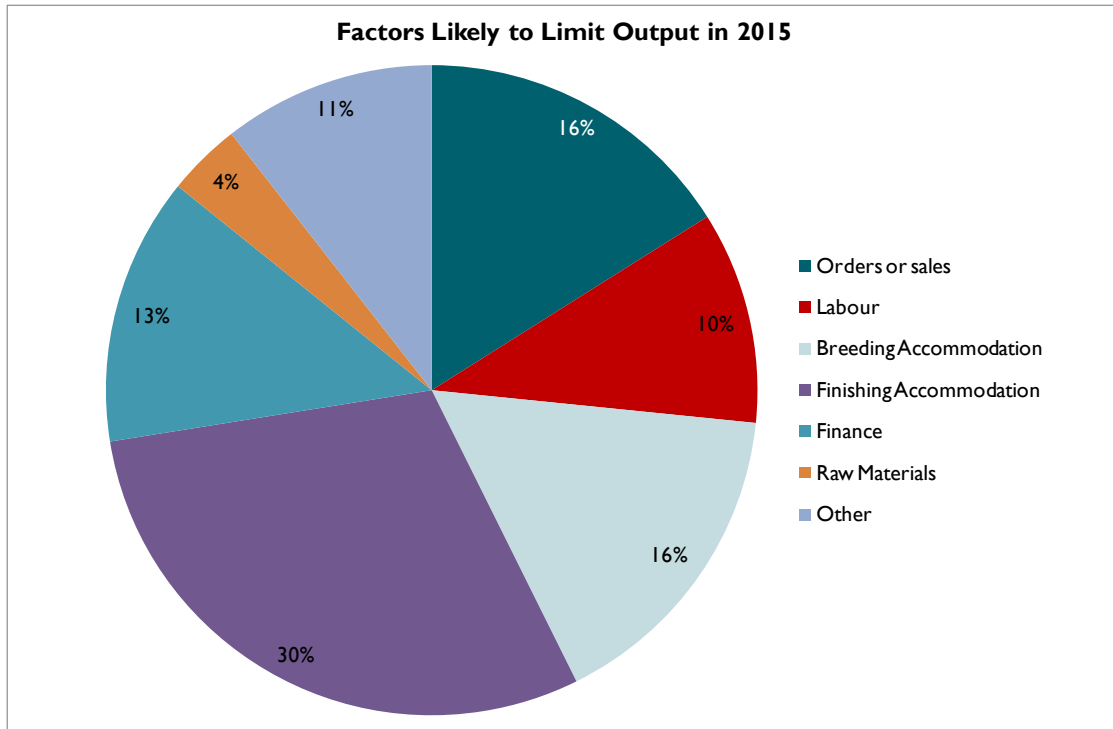


Figure 26: Factors likely to limit output over the next 12 months by sector



4.7 Industry Confidence: Prices

Q7. How do your average selling prices in the year compare with the year before?

Confidence in regards to average selling prices has fallen this year, with a negative balance of -38% seen in 2015. This compares to the positive 74% balance in 2014. The fall in the confidence level has been as a result of a larger number of people believing that their selling price has fallen over the last year to 62%, from 5% in 2014.

The negative balance is the first seen since 2011, although during that year the balance was worse at -56%.

The negativity has affected the balance of all individual sectors, with the exception of the vets where the balance is neutral at 0%. *Producers* have seen their balance fall to -40% from 85% in 2014. In 2014 88% of producers believed that their prices had increased over the last year, whereas in 2015 64% of respondents believed that their prices had fallen.

The *AIG's* confidence balance fell from 18% in 2014 to -15% in 2015. This year 46% of respondents believed that their average price had fallen over the last year, this compares to 24% in the previous year.

The *processor* balance was -100%, although this is based on two responses to the question. Confidence amongst vets was neutral.

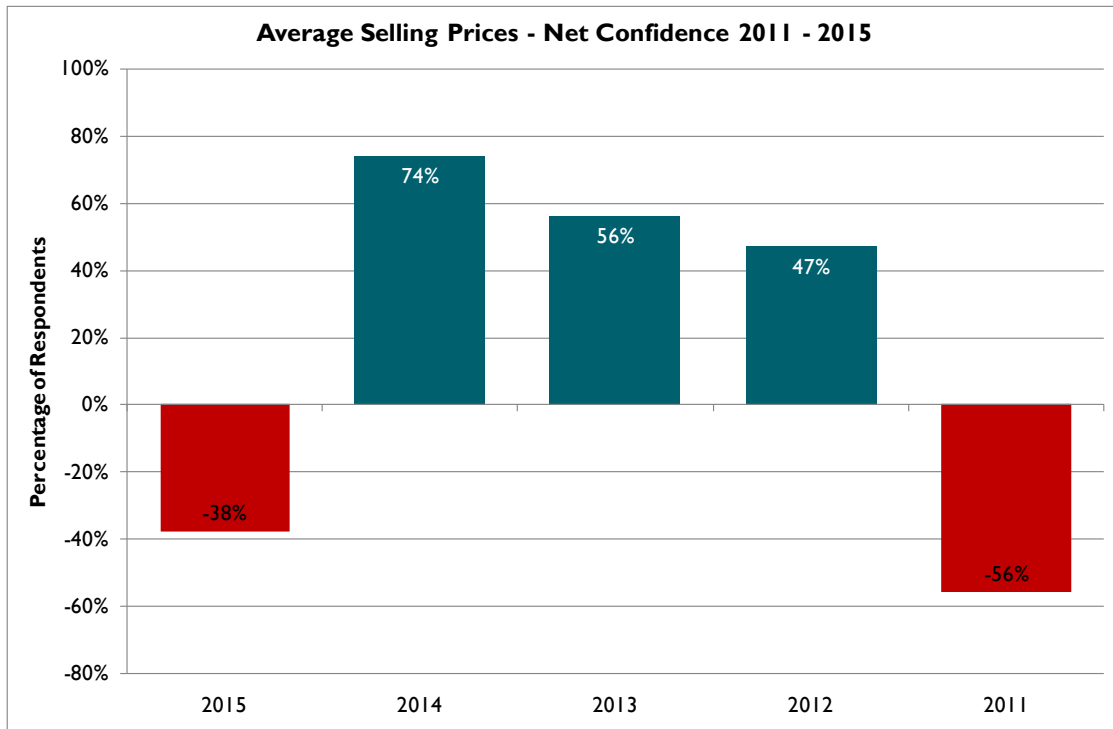
Figure 27: Average selling prices by sector

Sector	Base	Average Selling Prices			Net Confidence
		Up	Same	Down	
Base	148	35	22	91	-37.8%
		23.6%	14.9%	61.5%	
Producer	130	31	16	83	-40.0%
		23.8%	12.3%	63.8%	
Processor	2	0	0	2	-100.0%
		0.0%	0.0%	100.0%	
AIG	13	4	3	6	-15.4%
		30.8%	23.1%	46.2%	
Vet	3	0	3	0	0.0%
		0.0%	100.0%	0.0%	

Figure 28: Average selling prices 2011 – 2015

Optimism	2015		2014		2013		2012		2011	
	% of respondents	Net Confidence	% of respondents	Net Confidence	% of respondents	Net Confidence	% of respondents	Net Confidence	% of respondents	Net Confidence
More	24%		79%		67%		59%		10%	
Same	15%	-38%	16%	74%	22%	56%	29%	47%	24%	-56%
Less	61%		5%		11%		12%		66%	

Figure 29: Average selling prices 2011 – 2015



SECTION 5. BPEX QUALITY OF SERVICE

5.1 BPEX Quality of Service: Use of BPEX Services

Q8a. Have you used any BPEX services in the past 12 months?

Over the last year, 78% of respondents had used BPEX services. This was a slight fall from the 81% of respondents who stated the same response in the previous year.

This fall has been driven by a decrease in *producer* numbers using BPEX services over the last 12 months. Usage fell from 78% last year to its current value of 75%.

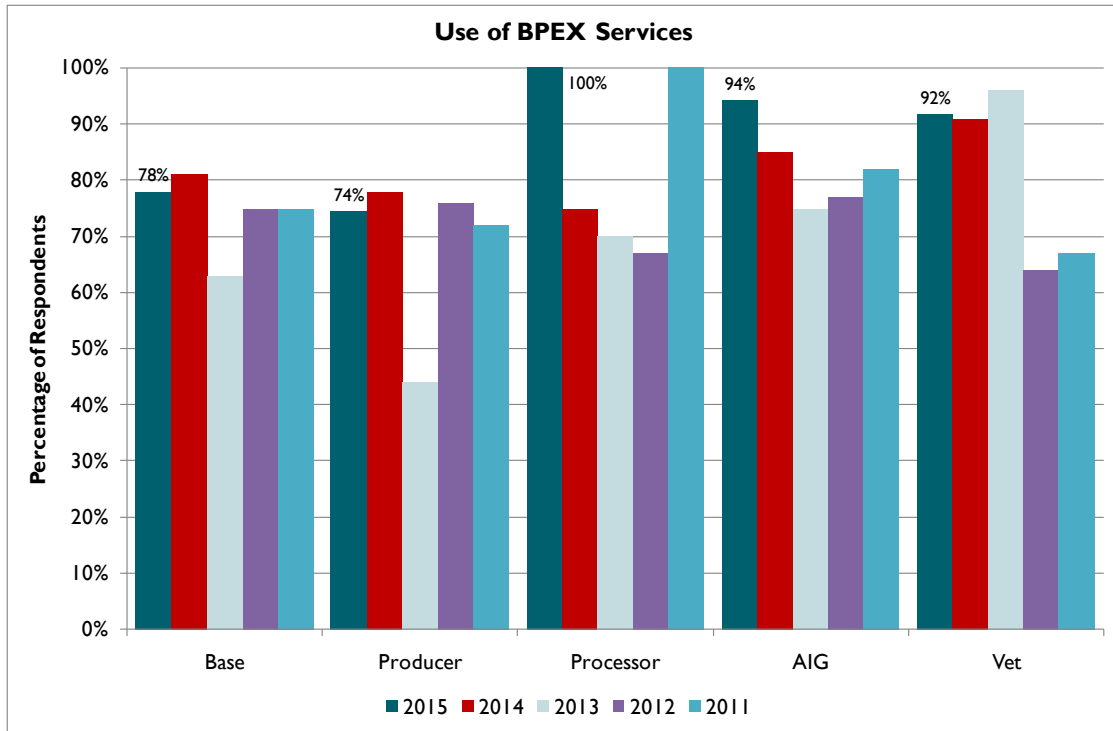
Usage within the other sectors all increased from 75% to 100% for *processors*, in *AIG* from 85% to 94%, and for *vets* from 88% to 91%.

The likelihood of each sector having used BPEX services over the previous 12 months was high with each sector scoring over 75% each.

Figure 30: Use of BPEX services in the past 12 months by sector

Sector	Base	Use of BPEX services in past 12 months	
		Yes	No
Total	173	135	38
		78.0%	22.0%
Producer	141	105	36
		74.5%	25.5%
Processor	3	3	0
		100.0%	0.0%
AIG	17	16	1
		94.1%	5.9%
Vet	12	11	1
		91.7%	8.3%

Figure 31: Use of BPEX services 2011 to 2015



Q8b. If you have used any BPEX services in the past 12 months, which services have you used?

The website continues to be the most popular BPEX service used by respondents over the last year. 17% of respondents stated that they used this service, a marginal 1% increase from the previous year's 16%. The website was most popular with *vets*, with 23% of this sector stating that they used this service; slightly behind the 22% of *processors* that used it.

Publications, factsheets and technical guides, along with events and meetings were the next most popular services used by respondents over the last 12 months, with 13% using both services.

In terms of publications, these were the most frequently used service by *producers* with 14% of them having used this. Events and meetings accounted for the most used services by *processors* and *AIG* respondents, with 14% of these sectors stating that they had used them.

The least popular BPEX services over the last year included pig meat export services and pork for caterers and pork for butchers websites. Each of these services only had 0.5% of respondents utilise them over the last 12 months.

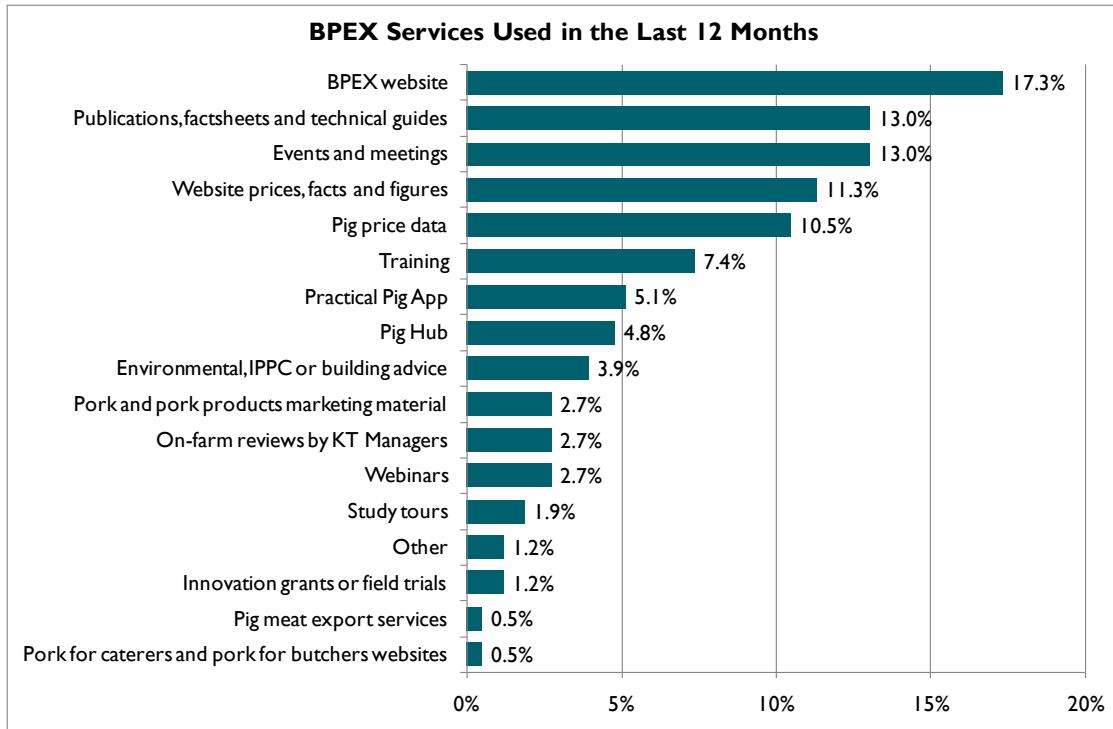
Other services respondents used from BPEX included:

- EAML 2
- AI testing
- Pig Scholarship
- Text updates
- Real Welfare App

Figure 32: BPEX services used in the past 12 months by sector

BPEX services used	Total	Sector			
		Producer	Processor	AIG	Vet
Base	583	438	14	91	40
BPEX website	101	76	3	13	9
	17.3%	17.4%	21.4%	14.3%	22.5%
Practical Pig App	30	19	0	6	5
	5.1%	4.3%	0.0%	6.6%	12.5%
Webinars	16	10	0	5	1
	2.7%	2.3%	0.0%	5.5%	2.5%
On-farm reviews by KT Managers	16	14	0	1	1
	2.7%	3.2%	0.0%	1.1%	2.5%
Study tours	11	9	0	2	0
	1.9%	2.1%	0.0%	2.2%	0.0%
Events and meetings	76	58	2	13	3
	13.0%	13.2%	14.3%	14.3%	7.5%
Training	43	36	0	4	3
	7.4%	8.2%	0.0%	4.4%	7.5%
Innovation grants or field trials	7	6	0	0	1
	1.2%	1.4%	0.0%	0.0%	2.5%
Environmental, IPPC or building advice	23	19	0	3	1
	3.9%	4.3%	0.0%	3.3%	2.5%
Publications, factsheets and technical guides	76	60	1	11	4
	13.0%	13.7%	7.1%	12.1%	10.0%
Pig Hub	28	21	0	5	2
	4.8%	4.8%	0.0%	5.5%	5.0%
Pork and pork products marketing material	16	10	1	3	2
	2.7%	2.3%	7.1%	3.3%	5.0%
Pork for caterers and pork for butchers websites	3	3	0	0	0
	0.5%	0.7%	0.0%	0.0%	0.0%
Pig meat export services	3	1	1	1	0
	0.5%	0.2%	7.1%	1.1%	0.0%
Pig price data	61	44	3	11	3
	10.5%	10.0%	21.4%	12.1%	7.5%
Website prices, facts and figures	66	47	3	12	4
	11.3%	10.7%	21.4%	13.2%	10.0%
Other	7	5	0	1	1
	1.2%	1.1%	0.0%	1.1%	2.5%

Figure 33: BPEX services used in the last 12 months by sector



5.2 BPEX Quality of Service: Use of MI Services

Q8c. How useful did you find MI services?

Those respondents who had used MI services over the last 12 months were asked to rate the overall usefulness of their services. A ranking scale of 1 to 5 was used with 1 representing bad, and 5 excellent.

A mean score greater than 3 indicates that respondents have an above average satisfaction in terms of the usefulness of MI services.

All of the MI services covered within the survey reached a mean of above 3. The most useful MI service was ranked as prices, facts and figures on the BPEX website with an average mean score of 3.94. Those within the *AIG* and *vet* sectors ranked this service highly with mean scores of 4.40 each. The usefulness of this service has improved from last year's mean score of 3.87.

The pig price data service was ranked at 3.91, this service was not ranked last year. All sectors ranked the service above 3 indicating above average satisfaction. Those within the *AIG* and *vet* sectors ranked this service highly with mean scores of 4.40 each.

Cost or production estimates had a mean score of 3.60. This is slightly higher than the score it achieved last year of 3.55. The *vet* category gave it the highest mean score at 4.40, higher than the 3.37 provided last year indicating an increase in the usefulness of the service to this sector.

Figure 34: Usefulness of pig price data

Sector	Base	Mean	Usefulness of Pig Price Data				
			Excellent	Good	Satisfactory	Poor	Bad
Total	88	3.91	15	53	18	1	1
			17.0%	60.2%	20.5%	1.1%	1.1%
Producer	73	3.81	7	48	16	1	1
			9.6%	65.8%	21.9%	1.4%	1.4%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	10	4.40	6	2	2	0	0
			60.0%	20.0%	20.0%	0.0%	0.0%
Vet	5	4.40	2	3	0	0	0
			40.0%	60.0%	0.0%	0.0%	0.0%

Figure 35: Usefulness of prices, facts and figures on BPEX website

Sector	Base	Mean	Usefulness of Prices, facts and figures on BPEX				
			Excellent	Good	Satisfactory	Poor	Bad
Total	88	3.94	17	52	17	1	1
			19.3%	59.1%	19.3%	1.1%	1.1%
Producer	73	3.85	9	47	15	1	1
			12.3%	64.4%	20.5%	1.4%	1.4%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	10	4.40	6	2	2	0	0
			60.0%	20.0%	20.0%	0.0%	0.0%
Vet	5	4.40	2	3	0	0	0
			40.0%	60.0%	0.0%	0.0%	0.0%

Figure 36: Usefulness of Cost of production estimates

Sector	Base	Mean	Usefulness of Cost of Production Estimates				
			Excellent	Good	Satisfactory	Poor	Bad
Total	87	3.60	12	35	34	5	1
			13.6%	39.8%	38.6%	5.7%	1.1%
Producer	72	3.46	5	30	31	5	1
			6.9%	41.7%	43.1%	6.9%	1.4%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	10	4.20	5	2	3	0	0
			50.0%	20.0%	30.0%	0.0%	0.0%
Vet	5	4.40	2	3	0	0	0
			40.0%	60.0%	0.0%	0.0%	0.0%

5.3 Quality of Service: Service Quality

Q8d. Overall how would you rate BPEX services relative to your expectation?

As with the previous question, respondents who had used BPEX services over the last 12 months were asked to rate their overall quality of the services used based upon their experiences and expectations for a number of different factors. Expectations were ranked on a scale of 1 to 5, with 1 representing bad and 5 excellent.

All factors scored above 3, which indicated that respondents had an above average satisfaction with BPEX and the services they offer. Scores ranged from, 3.59 for clearly communicating to 4.15 for friendliness and helpfulness.

With the exception of friendliness and helpfulness (which mean score remained stable), all other factors saw their mean fall in comparison with last year. This indicates that although respondents still feel satisfied with BPEX's services the level of satisfaction is falling slightly.

The biggest fall in mean was for BPEX's ability to clearly communicate, which fell from 3.83 in 2014 to 3.59 in 2015 hence indicating an area in which BPEX may want to consider as a focus for future improvement.

Figure 37: BPEX’s ability to answer query by sector

Sector	Base	Mean	Ability to Answer Query				
			Excellent	Good	Satisfactory	Poor	Bad
Total	94	3.80	14	53	22	4	1
			14.9%	56.4%	23.4%	4.3%	1.1%
Producer	78	3.76	9	45	21	2	1
			11.5%	57.7%	26.9%	2.6%	1.3%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	9	3.67	2	4	1	2	0
			22.2%	44.4%	11.1%	22.2%	0.0%
Vet	7	4.43	3	4	0	0	0
			42.9%	57.1%	0.0%	0.0%	0.0%

Figure 38: BPEX’s responsiveness by sector

Sector	Base	Mean	Responsiveness				
			Excellent	Good	Satisfactory	Poor	Bad
Total	94	3.81	17	49	23	3	2
			18.1%	52.1%	24.5%	3.2%	2.1%
Producer	79	3.76	10	44	22	2	1
			12.7%	55.7%	27.8%	2.5%	1.3%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	8	3.88	4	2	0	1	1
			44.4%	22.2%	0.0%	11.1%	11.1%
Vet	7	4.29	3	3	1	0	0
			42.9%	42.9%	14.3%	0.0%	0.0%

Figure 39: BPEX’s friendliness and helpfulness by sector

Sector	Base	Mean	Friendliness and Helpfulness				
			Excellent	Good	Satisfactory	Poor	Bad
Total	98	4.15	31	51	16	0	0
			33.0%	54.3%	17.0%	0.0%	0.0%
Producer	82	4.11	24	43	15	0	0
			29.3%	52.4%	18.3%	0.0%	0.0%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	9	4.33	4	4	1	0	0
			44.4%	44.4%	11.1%	0.0%	0.0%
Vet	7	4.43	3	4	0	0	0
			42.9%	57.1%	0.0%	0.0%	0.0%

Figure 40: BPEX's accurateness by sector

Sector	Base	Mean	Accuracy				
			Excellent	Good	Satisfactory	Poor	Bad
Total	93	3.78	15	48	25	5	0
			16.0%	51.1%	26.6%	5.3%	0.0%
Producer	77	3.73	10	40	23	4	0
			13.0%	51.9%	29.9%	5.2%	0.0%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	9	3.78	2	4	2	1	0
			22.2%	44.4%	22.2%	11.1%	0.0%
Vet	7	4.43	3	4	0	0	0
			42.9%	57.1%	0.0%	0.0%	0.0%

Figure 41: BPEX's authoritativeness by sector

Sector	Base	Mean	Authoritativeness				
			Excellent	Good	Satisfactory	Poor	Bad
Total	90	3.69	16	38	28	8	0
			17.0%	40.4%	29.8%	8.5%	0.0%
Producer	75	3.61	11	31	26	7	0
			14.7%	41.3%	34.7%	9.3%	0.0%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	8	3.75	2	3	2	1	0
			22.2%	33.3%	22.2%	11.1%	0.0%
Vet	7	4.43	3	4	0	0	0
			42.9%	57.1%	0.0%	0.0%	0.0%

Figure 42: BPEX's value for money by sector

Sector	Base	Mean	Value for Money				
			Excellent	Good	Satisfactory	Poor	Bad
Total	92	3.60	18	35	27	8	4
			19.1%	37.2%	28.7%	8.5%	4.3%
Producer	78	3.49	11	30	26	8	3
			14.1%	38.5%	33.3%	10.3%	3.8%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	8	4.00	4	2	1	0	1
			44.4%	22.2%	11.1%	0.0%	11.1%
Vet	6	4.50	3	3	0	0	0
			42.9%	42.9%	0.0%	0.0%	0.0%

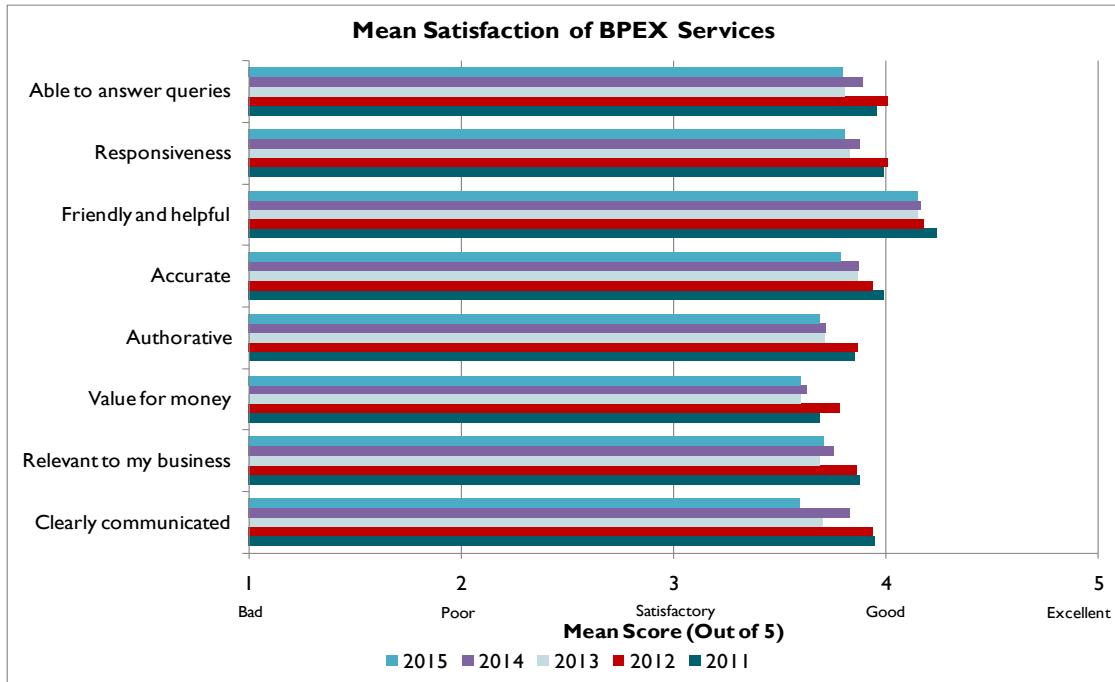
Figure 43: BPEX’s relevance to respondent’s business by sector

Sector	Base	Mean	Relevancy				
			Excellent	Good	Satisfactory	Poor	Bad
Total	96	3.71	17	45	24	9	1
			18.1%	47.9%	25.5%	9.6%	1.1%
Producer	80	3.60	10	38	23	8	1
			12.5%	47.5%	28.8%	10.0%	1.3%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	9	4.22	4	4	0	1	0
			44.4%	44.4%	0.0%	11.1%	0.0%
Vet	7	4.29	3	3	1	0	0
			42.9%	42.9%	14.3%	0.0%	0.0%

Figure 44: BPEX’s ability to clearly communicate by sector

Sector	Base	Mean	Communication				
			Excellent	Good	Satisfactory	Poor	Bad
Total	101	3.59	17	45	27	5	7
			18.1%	47.9%	28.7%	5.3%	7.4%
Producer	85	3.52	10	40	25	4	6
			11.8%	47.1%	29.4%	4.7%	7.1%
Processor	0	N/A	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%
AIG	9	3.89	4	2	2	0	1
			44.4%	22.2%	22.2%	0.0%	11.1%
Vet	7	4.14	3	3	0	1	0
			42.9%	42.9%	0.0%	14.3%	0.0%

Figure 45: Mean satisfaction with BPEX services 2011 to 2015



5.4 Quality of Service: Reasons for Not Using BPEX

Q8e. Which best describes your reason for not using BPEX services during 2014?

The number of respondents who used alternative sources of information instead of BPEX services last year has increased from 47% in 2014 to 60% in 2015. This remains as the main reason for not using BPEX.

18% of respondents are unaware of who is best for them to contact in BPEX, which resulted in a lack of service use. This is a marginal increase from 17% the year before.

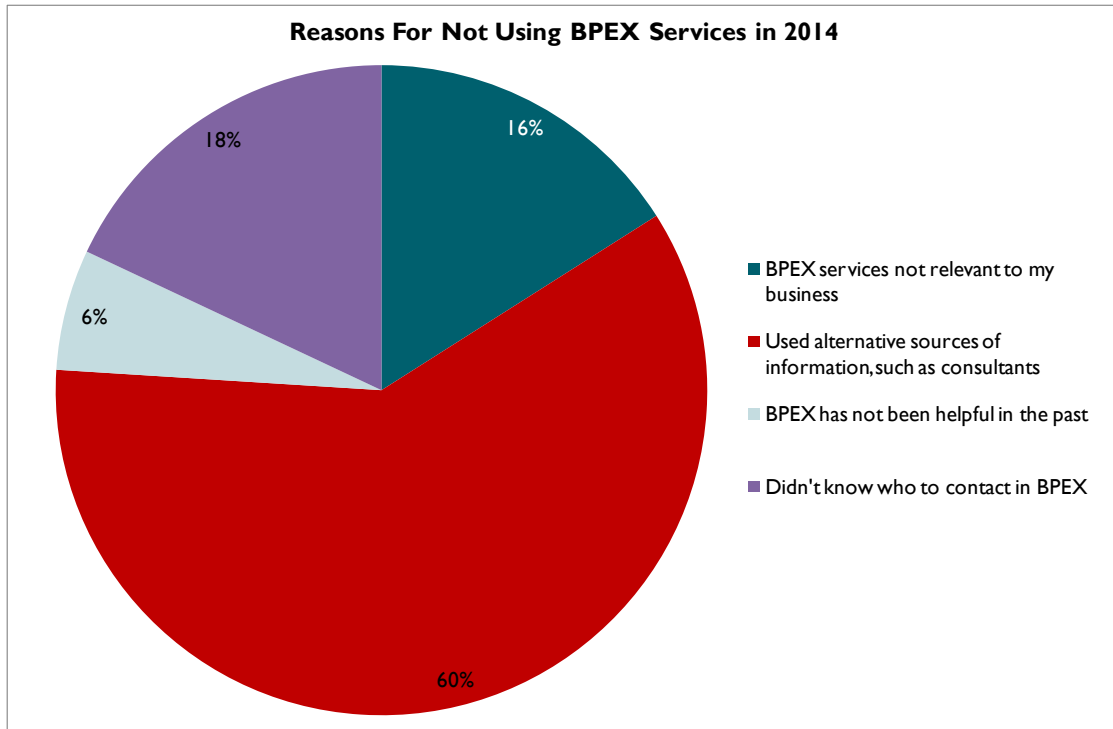
There were 16% of respondents who believed that BPEX services were not relevant to their business, this is a fall from the 26% who felt the same last year. This indicates an increase in the relevancy of BPEX services to respondents and their businesses.

6% of respondents felt that BPEX had not been helpful to them in the past and as such that is why they have not used their services over the last year. This figure is lower than the 10% of respondents who felt the same the year before.

Figure 46: Reasons for not using BPEX services by sector

Reasons for not using BPEX services in 2014	Total	Sector			
		Producer	Processor	AIG	Vet
Base	50	45	0	4	1
BPEX services not relevant to my business	8	6	0	2	0
	16.0%	13.3%	0.0%	50.0%	0.0%
Used alternative sources of information, such as consultants	30	28	0	2	0
	60.0%	62.2%	0.0%	50.0%	0.0%
BPEX has not been helpful in the past	3	3	0	0	0
	6.0%	6.7%	0.0%	0.0%	0.0%
Didn't know who to contact in BPEX	9	8	0	0	1
	18.0%	17.8%	0.0%	0.0%	100.0%

Figure 47: Reasons for not using BPEX services in 2014



5.5 BPEX Quality of Service: Future Contact with BPEX

Q9. Do you anticipate that you will use BPEX Services in the next 12 months?

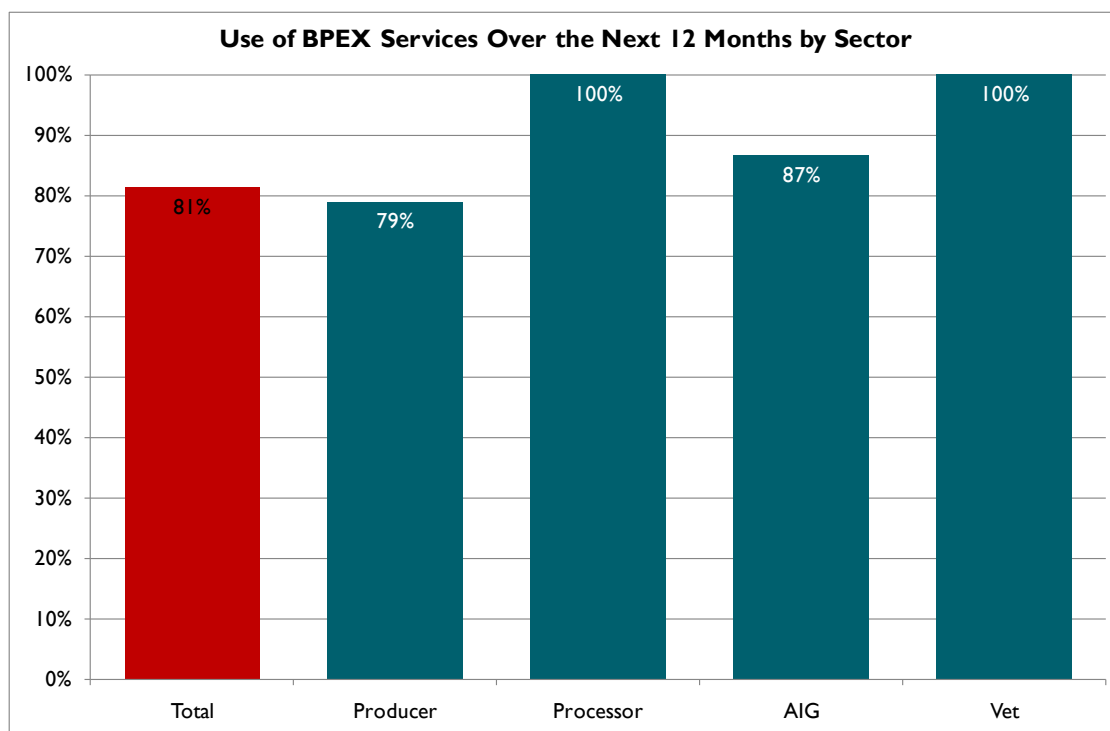
When respondents were asked if they would use BPEX services over the coming 12 months, 81% stated they would. This is a fall from the 86% who agreed in 2014, but an increase from 75% in 2013 and 80% in 2012.

The use of BPEX over the next year was high amongst all sectors. All *processors* and *vets* who responded to this question believed they would use the services, (although this is based on just three processor respondents). This was an increase from 75% for *processors* and 91% for *vets* in 2014.

87% of *AIGs* would use BPEX services this year, alongside 79% of *processors*. This is a fall for both sectors as in 2014, 90% of *AIGs* and 84% of *processors* believed they would use the services of BPEX over the coming year

Figure 48: Use of BPEX services in the next 12 months by sector

Sector	Base	Use of BPEX services in next 12 months	
		Yes	No
Total	172	140 81.4%	32 18.6%
Producer	143	113 79.0%	30 21.0%
Processor	3	3 100.0%	0 0.0%
AIG	15	13 86.7%	2 13.3%
Vet	11	11 100.0%	0 0.0%

Figure 49: Use of BPEX services over the next 12 months by sector**Q10. If yes, which type of services do you think you will use?**

The website is set to continue to be the most used BPEX service over the next 12 months. 14% of respondents believed that they would use this service, an increase from the 10% who felt the same in 2014. Potential usage of the website was highest amongst vets with 18% stating they would use it over the year.

Publications, factsheets and technical guides were the second most popular service offered by BPEX, with 12% of respondents looking to use these over the next year. 13% of *producers* and AIGs have plans to use this service over the coming months.

Pig meat export services and pork for caterers and pork for butchers websites were the services least likely to be used by respondents over the next year. Both services are set to be used by less than 1% of respondents.

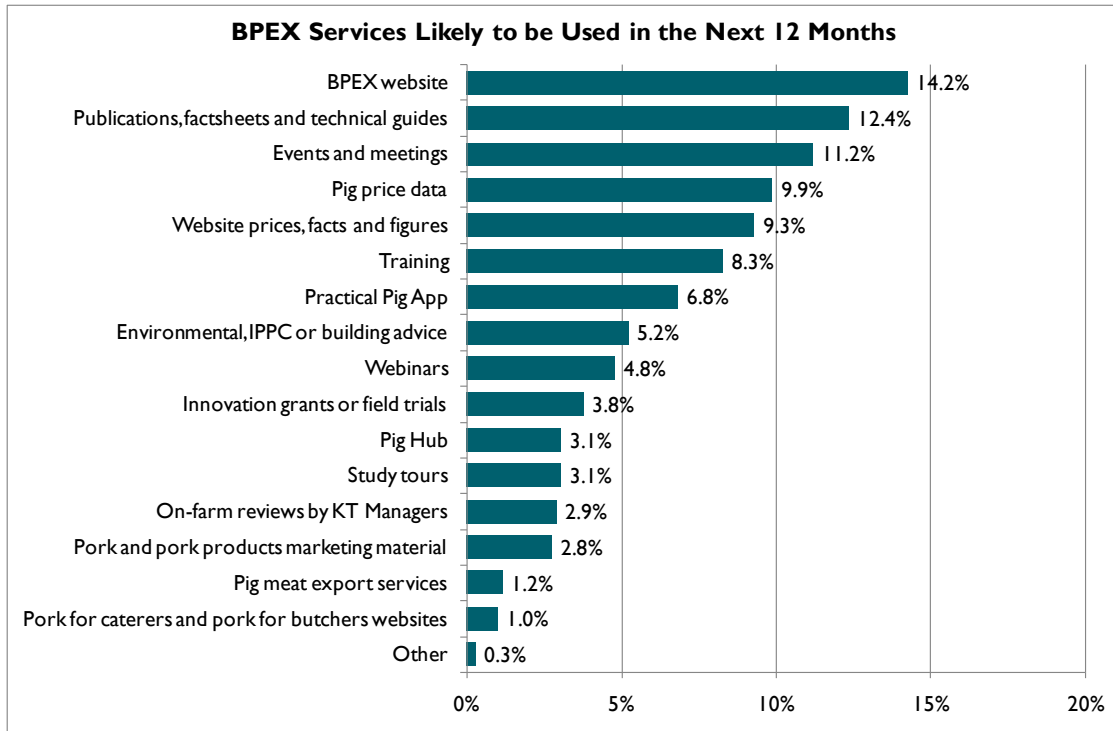
Other services which are expected to be used by respondents include:

- EAML 2
- RWO App

Figure 50: BPEX services likely to be used in the next 12 months

BPEX services likely to be used in the next 12 months	Total	Sector			
		Producer	Processor	AIG	Vet
Base	689	516	22	101	50
BPEX website	98	75	2	12	9
	14.2%	14.5%	9.1%	11.9%	18.0%
Practical Pig App	47	33	1	5	8
	6.8%	6.4%	4.5%	5.0%	16.0%
Webinars	33	20	1	6	6
	4.8%	3.9%	4.5%	5.9%	12.0%
On-farm reviews by KT Managers	20	15	1	3	1
	2.9%	2.9%	4.5%	3.0%	2.0%
Study tours	21	15	1	5	0
	3.0%	2.9%	4.5%	5.0%	0.0%
Events and meetings	77	58	2	12	5
	11.2%	11.2%	9.1%	11.9%	10.0%
Training	57	47	1	5	4
	8.3%	9.1%	4.5%	5.0%	8.0%
Innovation grants or field trials	26	21	1	3	1
	3.8%	4.1%	4.5%	3.0%	2.0%
Environmental, IPPC or building advice	36	32	0	3	1
	5.2%	6.2%	0.0%	3.0%	2.0%
Publications, factsheets and technical guides	85	65	2	13	5
	12.3%	12.6%	9.1%	12.9%	10.0%
Pig Hub	21	15	1	4	1
	3.0%	2.9%	4.5%	4.0%	2.0%
Pork and pork products marketing material	19	10	2	5	2
	2.8%	1.9%	9.1%	5.0%	4.0%
Pork for caterers and pork for butchers websites	7	5	1	1	0
	1.0%	1.0%	4.5%	1.0%	0.0%
Pig meat export services	8	4	1	3	0
	1.2%	0.8%	4.5%	3.0%	0.0%
Pig price data	68	51	2	11	4
	9.9%	9.9%	9.1%	10.9%	8.0%
Website prices, facts and figures	64	49	3	10	2
	9.3%	9.5%	13.6%	9.9%	4.0%
Other	2	1	0	0	1
	0.3%	0.2%	0.0%	0.0%	2.0%

Figure 51: BPEX services likely to be used in the next 12 months



5.6 BPEX Quality of Service: Awareness of Services

Q11. Are you aware of or do you use any of the following BPEX services, products and campaigns?

The text alerts for meetings and disease outbreak service which BPEX offers has the highest awareness amongst all respondents. 19% of respondents were aware that this service existed, however usage was lower at 16%.

24% of all respondents used the Pig Farmer service offered by BPEX, the most utilised service according to the results. However the services overall awareness was lower at 17%.

Awareness and actual usage of BPEX services differed between sectors:

- *Producer* – this sector had the highest awareness (19%) of pig price data, and the highest usage of the Pig Farmer insert at 25%
- *Processor* – this sector's results were very much split across the different services offered. 18% of respondents were aware equally of BPEX text alerts, pig price data, pig market weekly, and pig market trends. In comparison, usage of services was split between pig price data, pig market weekly, and pig market trends at 22% each
- *AIG* – text alerts was the service which AIGs were most aware of (18%). Usage was highest for both pig price data and the pig farmer insert at 21% each
- *Vet* – 20% of vets were aware of the text alert services that BPEX provide. Usage was highest though for the Pig Farmer insert, with 44% of vets stating that they had used this over the last 12 months

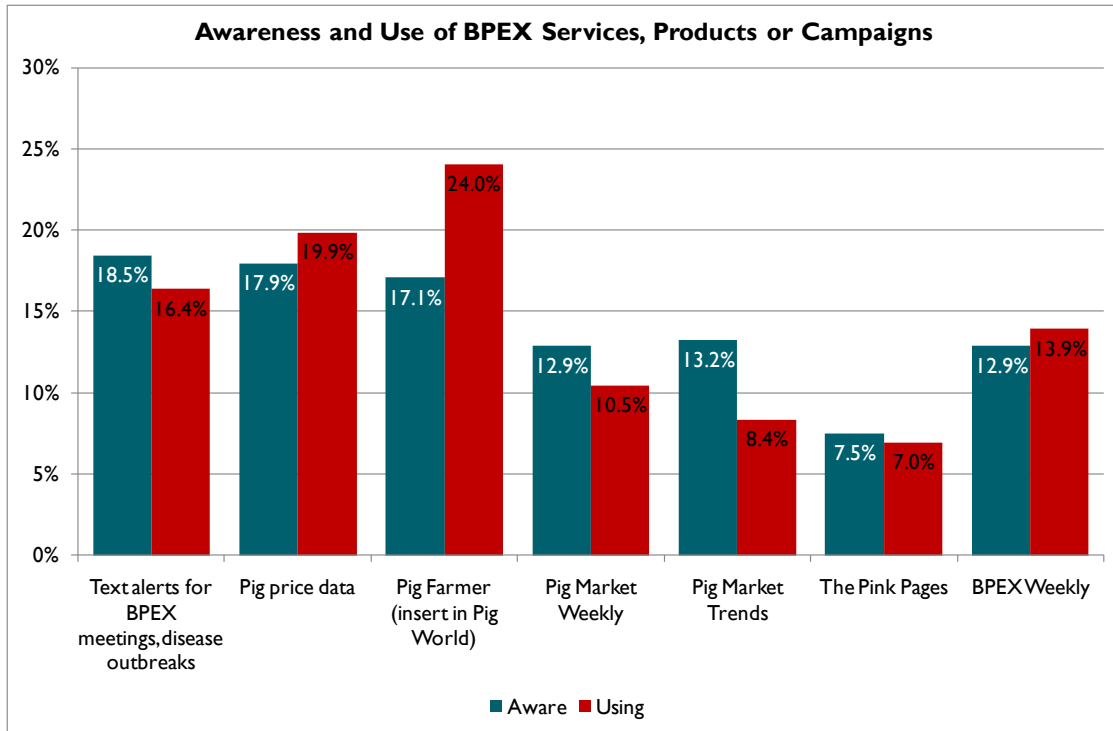
Figure 52: Awareness of BPEX services, products or campaigns

Awareness of BPEX services, products or campaigns	Total	Sector			
		Producer	Processor	AIG	Vet
Base	574	448	17	68	41
Text alerts for BPEX meetings, disease outbreaks	106	83	3	12	8
	18.5%	18.5%	17.6%	17.6%	19.5%
Pig price data	103	85	3	9	6
	17.9%	19.0%	17.6%	13.2%	14.6%
Pig Farmer (insert in Pig World)	98	81	1	9	7
	17.1%	18.1%	5.9%	13.2%	17.1%
Pig Market Weekly	74	55	3	10	6
	12.9%	12.3%	17.6%	14.7%	14.6%
Pig Market Trends	76	58	3	11	4
	13.2%	12.9%	17.6%	16.2%	9.8%
The Pink Pages	43	29	2	8	4
	7.5%	6.5%	11.8%	11.8%	9.8%
BPEX Weekly	74	57	2	9	6
	12.9%	12.7%	11.8%	13.2%	14.6%

Figure 53: Use of BPEX services, products or campaigns

Use of BPEX services, products or campaigns	Total	Sector			
		Producer	Processor	AIG	Vet
Base	287	212	9	57	9
Text alerts for BPEX meetings, disease outbreaks	47	38	1	7	1
	16.4%	17.9%	11.1%	12.3%	11.1%
Pig price data	57	42	2	12	1
	19.9%	19.8%	22.2%	21.1%	11.1%
Pig Farmer (insert in Pig World)	69	53	0	12	4
	24.0%	25.0%	0.0%	21.1%	44.4%
Pig Market Weekly	30	21	2	7	0
	10.5%	9.9%	22.2%	12.3%	0.0%
Pig Market Trends	24	14	2	8	0
	8.4%	6.6%	22.2%	14.0%	0.0%
The Pink Pages	20	17	1	1	1
	7.0%	8.0%	11.1%	1.8%	11.1%
BPEX Weekly	40	27	1	10	2
	13.9%	12.7%	11.1%	17.5%	22.2%

Figure 54: Awareness and use of BPEX services, products or campaigns



5.7 BPEX Quality of Service: Positive Impact of BPEX

Q12. Have you or anyone who works with you, been positively influenced to make any change to your business as a result of seeing BPEX material or attending a BPEX event?

The split between respondents who felt that BPEX had had a positive impact on their business and those that did not, were fairly evenly split this year. Overall 48% of respondents felt that BPEX had made a positive impact on their business, with 53% disagreeing. In comparison, in 2014 60% of respondents felt they had been positively influenced by BPEX.

The influence split was fairly even across all sectors, with the exception of *processors* where only one respondent had answered the question.

The ways in which BPEX have helped influence business decisions include:

- Providing training:

“Training has helped our business motivation”

“We come back with plenty of good ideas from BPEX training courses”

“We went on a study tour to France, and when we came home we changed our building plans and are now planning a more efficient construction”

- Offering practical advice on pigs
- Individual BPEX staff members having a positive influence on respondents’ staff
- Providing information on the sector for respondents to use as a basis for business decisions
- Helping to increase the confidence in the sector
- Helping people to understand legislation:

“We had help understanding IPPC rules which meant we changed the way in which we built our finishing accommodation”

Figure 55: Positive Impact of BPEX services on respondent’s business, by sector

Sector	Base	Positively influenced to make changes as a result of BPEX	
		Yes	No
Total	95	45 47.4%	50 52.6%
Producer	82	39 47.6%	43 52.4%
Processor	1	0 0.0%	1 100.0%
AIG	6	3 50.0%	3 50.0%
Vet	6	3 50.0%	3 50.0%

Figure 56: Positive Impact of BPEX services on respondent’s business

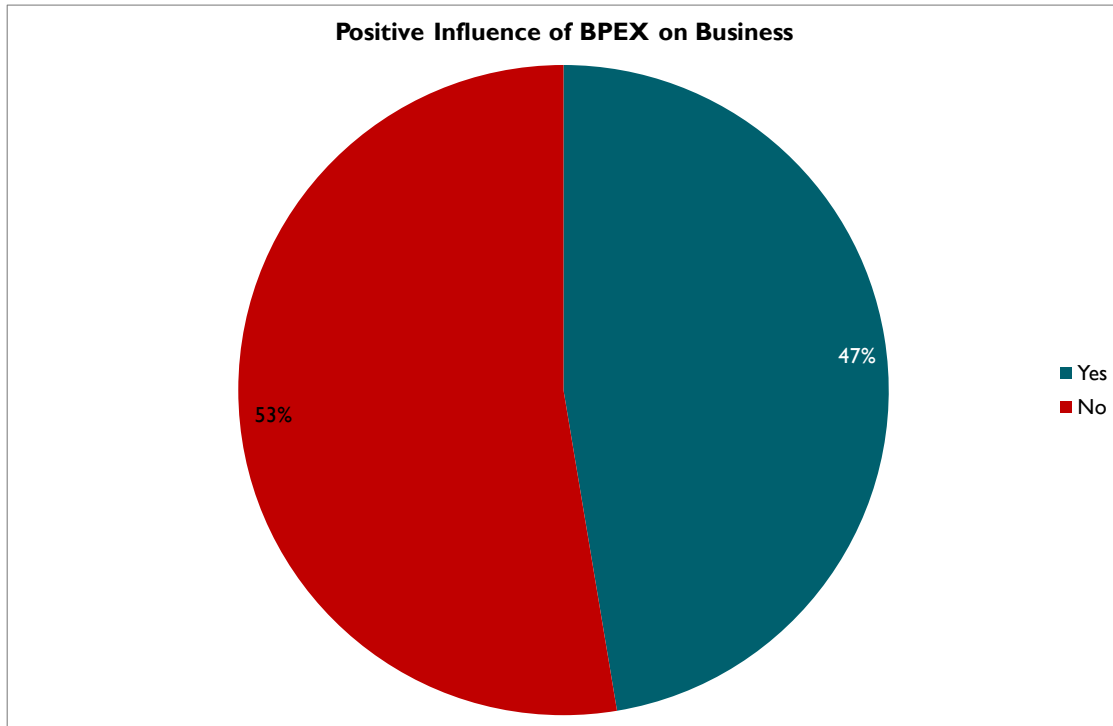
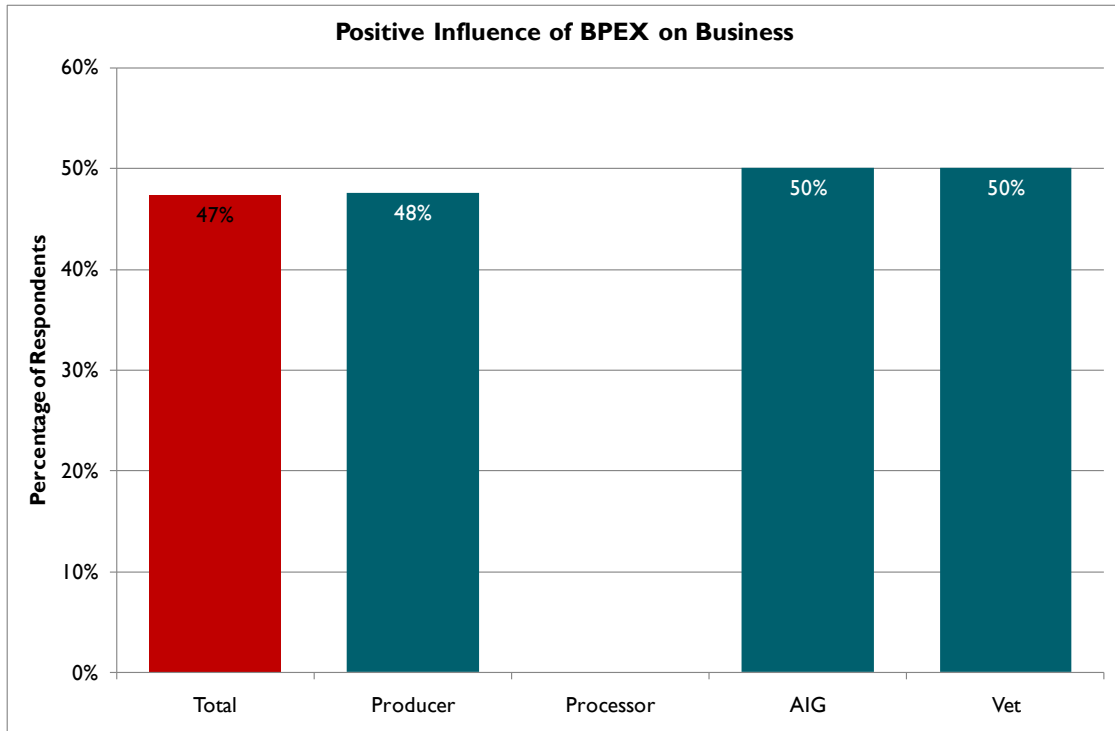


Figure 57: Positive Impact of BPEX services on respondent's business, by sector



5.8 BPEX Quality of Service: Other Services

Q13. Are there any other services that BPEX could provide which would help your business or would you like to make any other comments regarding BPEX and its services?

Suggestions for improvement:

- A number of respondents were keen for BPEX to offer more relevant training opportunities for the younger generation/new starters in the industry
- It was suggested that a ‘traffic light’ style system could be put in place by BPEX to inform producers of when the UK market was going to be in an oversupply situation. Green, red and amber lights would show the level of production and help producers to develop relevant strategies for their business
- BPEX’s training programmes are well structured and positive influences are gained from them. A number of respondents however felt it would be good for BPEX to offer a broader training programme focusing on topics such as: nutrition, physiology, pig health, and the environment for example
- Greater promotion of disease outbreaks and analysis of related price trends
- Providing more promotional and marketing material to end consumers that highlights that ‘British is best’
- Promotion of BPEX products and services to stakeholders is important, as a number of respondents were not aware of all that BPEX offered. As such they wanted to learn more about the service and make better use of what was already on offer to them in the future
- Several respondents were unhappy at the number of postal documents they receive from BPEX. This was seen as a waste of money, as they could easily be made accessible online

5.9 BPEX Quality of Service: Future Focus

Q14. What area should BPEX be focusing on in the next 12 months to help your business?

When respondents were asked which areas BPEX should concentrate their efforts on over the next 12 months there were three key areas which were the most popular:

– Promotion

Respondents wanted to see more British pork promotion provided to end consumers. Linked in with this was the fact that it should be communicated to consumers that they should be willing to pay more for their pork if it has high welfare standard

“Promote British more!”

“Market pork to increase consumption”

“Provide marketing information to help increase the uptake of UK pigmeat”

– Pricing

In terms of pricing, respondents are keen for BPEX to provide information on why pig prices are low at present. They also want to know ways in which the price can be improved upon in the future

“Keep pig prices up”

“Focus on improving pig prices – increase UK margins and make the industry competitive against the rest of the EU”

“Provide us with ways to deal with price volatility”

– Retailers

Respondents wanted BPEX to act on their behalf to encourage the retailers to stock greater volumes of British pork. Linked with this is the fact that respondents want supermarkets to pay a fair price for the pork they supply them with

“Put pressure on retailers to keep buying British”

“Concentrate on helping supermarkets to present meat better to customers – promote British”

“Increase the proportion of British pigmeat that is sold in the UK”

Other areas for future focus include:

- Opening up and developing new export markets for British pork

“Focus on exports, and repeat exports. It will take longer than a year, but help our industry to be the best”

- Helping to improve production efficiency in the sector

“Provide an unbiased best practice approach for producers in terms of production”

- Offer more information and research on bio security
- Work with agricultural colleges to encourage new entrants into the sector
- Keep the Red Tractor logo going and communicate with consumers about the value it adds to a product and what it stands for
- Keep up the good work
- Reducing ‘red tape’ for producers