

Doubts over Defra's June survey results

The UK pig herd increased by 1% compared with a year earlier, to 5.0 million head, according to the June 2018 Agricultural Survey figures published by Defra.

The increase in total pig numbers was driven by a 1% increase to 4.5 million head in the number of feeding pigs compared with the previous year. However, trends from the June survey are typically not supported by subsequent slaughtering data, so this year's results should be treated with caution.

The UK breeding herd showed a 1% decline to 504,000 head. However, with unreflective trends recorded in previous years, these results should also be viewed with some caution.

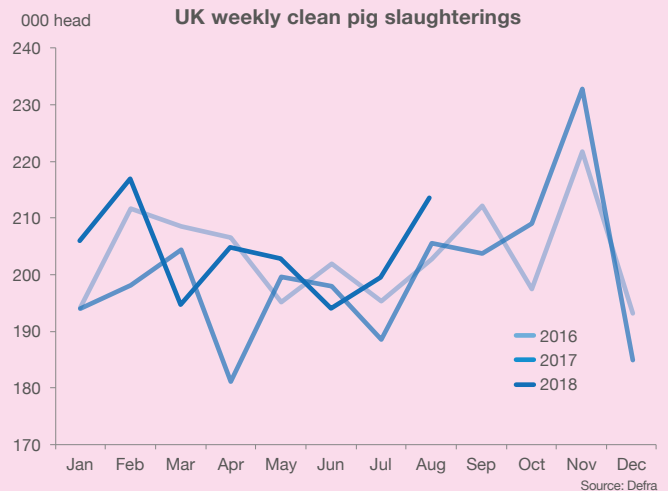
A reduction in in-pig sows is perhaps not unexpected, given higher slaughtering of sows in the first half of the year. However, this in itself reflected an older age profile of the herd, following a low culling rate in 2017.

Production of compound breeding feed was 3% higher than a year earlier between May and July this year, and Agrosoft data shows improved feed efficiency. So, while there is some uncertainty, AHDB considers that a small increase in the breeding herd over the past 12 months might in fact be more realistic.

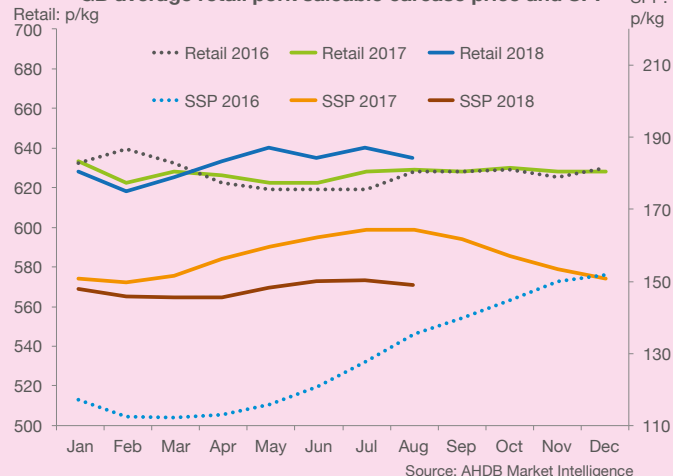
Sources of pig meat consumed in the UK



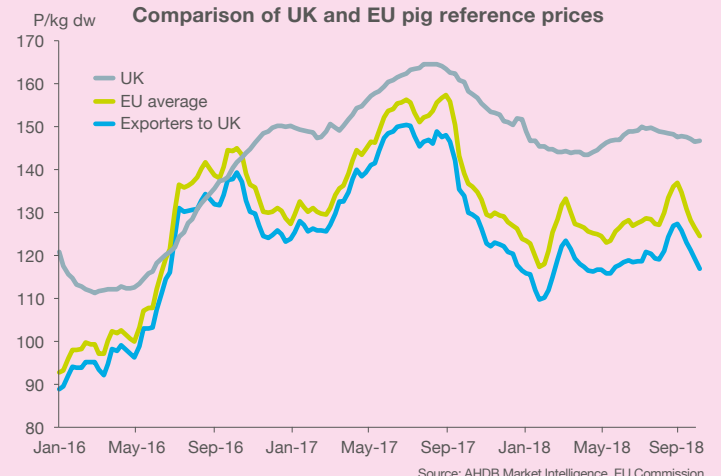
UK weekly clean pig slaughtering



GB average retail pork saleable carcass price and SPP



Comparison of UK and EU pig reference prices



Diary dates

For details, and to register for any of these events, visit: pigpro.ahdb.org.uk

5 November

Health and antibiotics, keeping the balance (Newbury)

6 November

Health and antibiotics, keeping the balance (Diss)
Otley Pig Discussion Group

8 November

Pig Veterinary Society autumn meeting (Belfast)
Darlington Pig Discussion Group
Supervisory Skills Workshop (Norwich)

9 November

Health & Safety on a Pig Unit (Lincs.)

13 November

North Riding Pig Discussion Group
Stockman Development Scheme (Bury St Edmunds): Gilt management
Cambridge Pig Discussion Group

14 November

Lancashire Pig Discussion Group

15 November

Norfolk Pig Discussion Group

20 November

Stockman Development Scheme (Lincs.): Gilt management

21 November

Essex Pig Discussion Group
Health and antibiotics, keeping the balance (Wetherby)
Exeter Pig Club

22 November

Fosseway Pig Discussion Group
Supervisory Skills Workshop (York)

26 November

Health and antibiotics, keeping the balance (Exeter)

27 November

Stockman Plus (Bury St Edmunds): Gilt Management

28 November

Stockman Development Scheme (Kidderminster): Gilt management
Stockman Plus (York): Gilt Management

29 November

South Yorkshire Pig Club

3 December

Oxford Pig Club

5 December

Stockman Development Scheme (Kidderminster): Gilt management

6 December

Somerset Pig Club

Pig Innovation Network – get involved

Networks can be a powerful tool for developing influential relationships, fostering creative solutions and sharing both knowledge and resources. With this in mind, the ‘Pig Innovation Network’ (PiN) is being created within AHDB as a new way to bring together passionate ‘pig people’ who are invested in the success of the pork industry.

We know that people are drawn to those who are like themselves but the strength of a network is in its diversity. PiN will encourage diversity in membership and provide a space, within which, innovation, debate and meaningful information exchange from a variety of industry perspectives can flourish.

Connections are already being made between producers, pig vets, feed companies, academics, nutritionists, genetics companies to name but a few. However, PiN will go a step further to create a linked-up, multiperspective, nationwide group with the shared goal of keeping the pig industry innovative, relevant, competitive and exciting.

PiN is in its infancy, but interest, and the list of people signing up to participate, is growing daily. The first quarterly newsletter will be released in early December, signalling the ‘launch’ of PiN and its associated online forum, with details of network events to follow.

The network will develop and grow in response to member participation and engagement, with the aim of adapting to growing challenges and feedback from the industry.

The PiN project is ambitious and has enormous potential but getting the right mix of people into the network is crucial to its success. If you would like to know more or would like to get involved, contact pippa.handley@ahdb.org.uk or visit PiN@ahdb.org.uk

Uncertainty clouds global pork market

With disease and trade challenges influencing the global pork market, the future is uncertain. Nonetheless, the main global exporters look set to produce more pork in the coming year, particularly the US, where the breeding herd has continued to expand. However, the EU may see production stabilise, or even fall slightly with sow numbers declining.

Higher pork production from the key exporters means prices will only be supported if we see higher demand from importing countries. The growing middle class in developing Asian and Latin American countries will help, but the scale of this demand will be key to determining global pork prices next year.

The presence of African Swine Fever (ASF) in China has the potential to significantly influence the global market. ASF will almost certainly slow the ongoing expansion in Chinese pork production next year, allowing for some import opportunities to develop. The latest USDA forecasts anticipate a 7% increase in Chinese import demand next year. However, if the number of ASF outbreaks continue to rise, and production is impacted, import demand could be even higher. Equally, if domestic demand is diminished due to (unfounded) food safety concerns, demand may be lower.

As the US faces prohibitive tariffs on pig meat exports to China, the EU, Brazil and Canada are best placed to capitalise on the opportunity. Depending on how the trade war develops, this may mean prices in these nations fare better than in the US next year. However, they will still need to compete against US pork, which may be very competitively priced, on other import markets.

Overall, uncertainty around import demand, along with anticipated higher production from key exporters, means the outlook for 2019 is cautious.

Exciting new recipes for the fourth burst of the midweek meals campaign

Work is underway and our Food Communications Manager Denise Spencer-Walker has come up with a range of delicious new recipes for the next burst of the campaign in January. Pork is the most popular meat in the world but, in the UK, the 48% of consumers who eat pork, only cook it in one way, and that's mainly as a Sunday roast. So we want to introduce the UK to an exciting new range of global pork dishes. We were looking for a range of recipes that are quick and easy to achieve midweek, yet inspiring and different enough to make people break from their normal choices and try something new.

Bearing in mind that, when it comes to midweek cooking, people want taste but not too much faff, not too many ingredients, nothing too complicated with not too much washing up! Also, with the TV advert going out in January, a time of year when people are a bit more mindful about what they choose to eat, we wanted the recipes to be healthy too.

The new recipes hit the mark and are a great addition to the range already on our website, speedy five-spice pork noodles will be our hero recipe in the new recipe booklet, accompanied by dishes such as Japanese caramelised pork with vegetable spaghetti, Vietnamese pork with jasmine rice and turmeric pork skewers with super-grain salad.

These recipes have an abundance of flavour and colour, as you can see in these fabulous new photos. The photographer, Steve Baxter perfectly captured the essence of the meals and showcased them in light, bright shots which suggest freshness, wholesomeness and simplicity. These recipes form part of our January PR campaign and three of them will be featured in short, engaging recipe videos to be shared across media, social media and the lovepork website.



Export Team keeping busy

The latest data shows that UK pork exports in August surpassed year-earlier levels. This is a positive trend in what has been a challenging environment for pork exporters. August was the first month to show year-on-year growth since the first quarter of 2018. However, at 140,000 tonnes shipped in the first eight months of the year, this shows in excess of 20% growth over the past five years for UK pork exports. In addition, a further 56,000 tonnes of pig meat offal were exported by the end of August.



Despite a fall in volume sales to China, the market remained the leading destination for UK pork, accounting for 17% of pork exports and nearly 60% of pig meat shipments. Recently, AHDB hosted Christine Middlemiss (pictured left), the UK's new Chief Veterinary Officer at the

China International Meat Industry Exhibition (CIMIE) to give her a detailed insight into this important market. The show was held in Beijing this year, attracting key participants from the

Chinese supply chain and providing an excellent platform for UK pork exporters. This month, AHDB will host all the UK's exporters to China in Shanghai at FHC, the most important show for imported food and drink.

The United States has been a stand-out market for our high-welfare, high-value pork exports this year; in fact, in the first eight months of the year, exports surpassed full year volumes sales from 2017. Potential for further growth in the US is good, AHDB hosted exporters at the most significant show to target the all-important foodservice sector, the National Restaurant Association show in Chicago.

More recently, AHDB led a mission of exporters to explore the opportunity in Florida, including meetings with retailers and leading suppliers in the tourism and foodservice sectors, showcasing the UK's high-end sector capability and quality.