



# Pig production in Poland

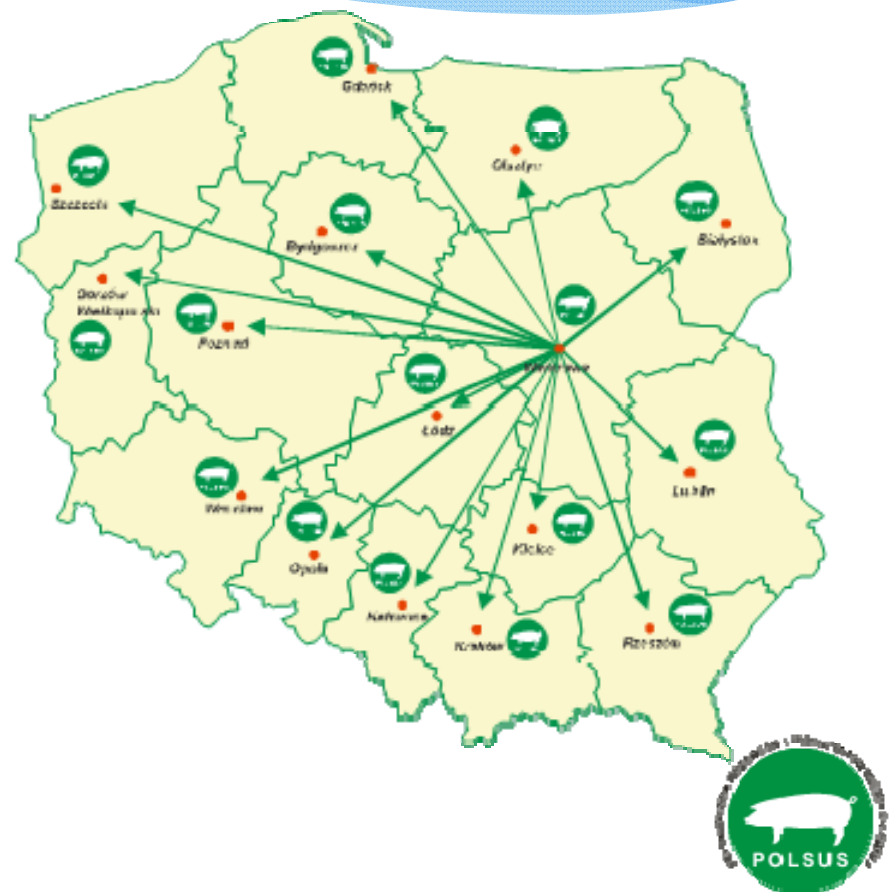
Katarzyna Skrzymowska, PhD  
*pig breeding specialists*

PZHiPTCh „POLSUS”, Ryzowa 90, 02-495 Warszawa, Polska

Polish Pig Breeders and Producers Association „POLSUS”

# Polish Pig Breeders and Producers Association „POLSUS”

- \* Established in 1958,
- \* Central office in Warsaw, 15 regional offices, 70 employees
- \* Associates 19 regional pig breeders associations,
- \* Responsible for National Breeding Program (NBP) for pigs since 2003:
  - estimating breeding and performance value of pigs
  - keeping herdbooks, registers and electronic data base
- \* Represents and protects pig farmers’ rights and interests



# National Breeding Program

## NBP in 2011

- ✓ 413 pig breeders
- ✓ 506 breeding herds
- ✓ 13 600 breeding sows
- ✓ 27 sows/herd on average
- ✓ 6 pig breeds: landrace (6320), large white (5150), duroc (740), pietrain (520), hampshire (70), pulawska (800 rare breed)



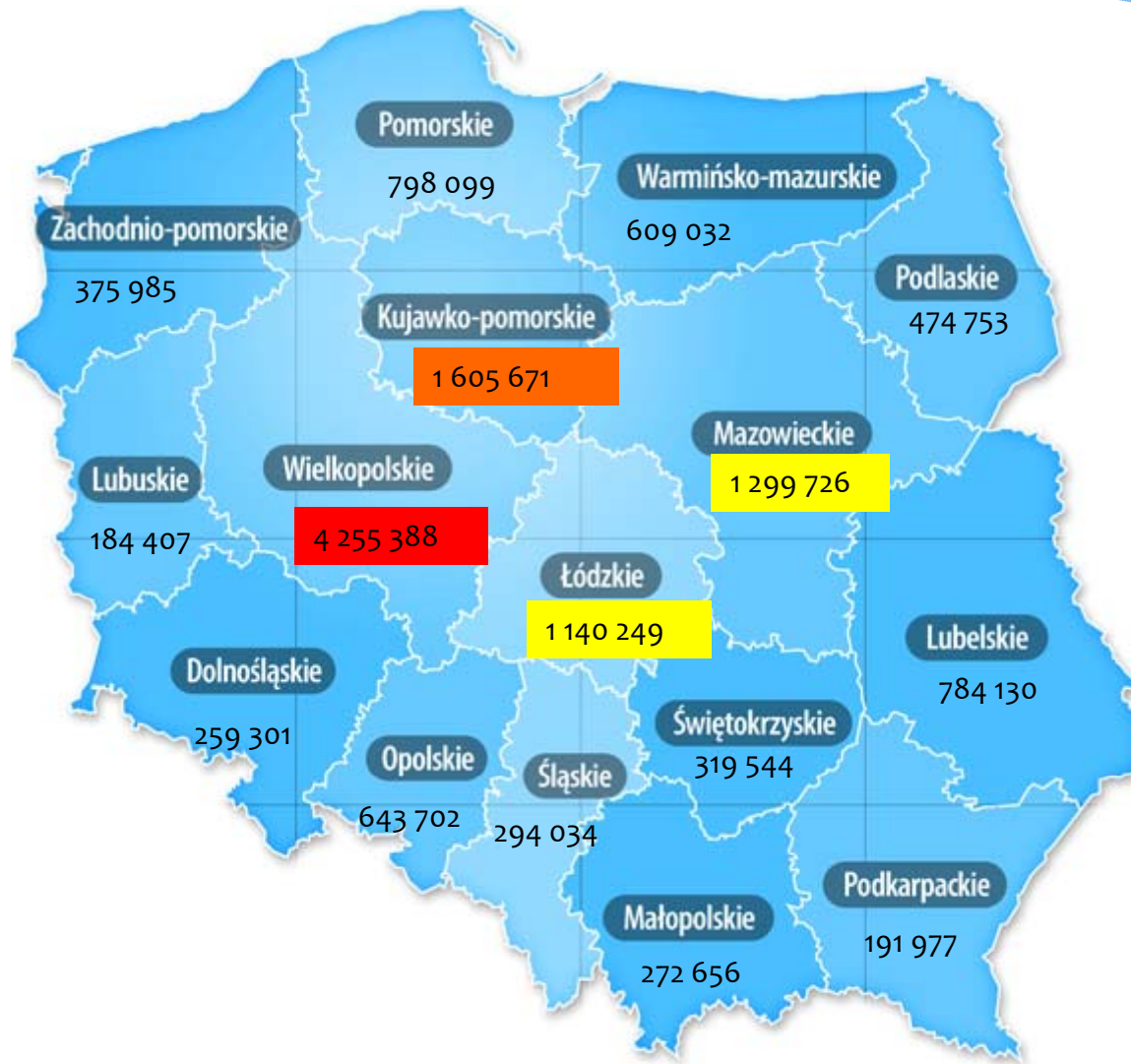
# Pigs' statistics

	No of pigs	No of sows	No of piglets	Price ratio alive weight: rye	Fatteners slaughtered (no)	Carcass price (PLN/ kg)
2010 (March)	14 781 600	1 383 500	4 299 700	1 : 10,1	19 700 000	5,07 (av. 2010)
2011 (March)	13 100 200	1 168 200	4 018 676	1 : 5,3	19 600 000	5,96 (av. 2011)
2012 (March)	11 478 000	1 113 700	3 351 576	1 : 6,3	18 700 000f	6,65 (Jan-May 2012)
Change y/y	- 11,4% (2011/2010)	- 15,6% (2011/2010)	- 6,5% (2011/2010)	- 47,52% (2011/2010)	- 0,5% (2011/2010)	+ 17,54 % (2011/2010)
	- 12,4% (2012/2011)	- 4,7% (2012/2011)	- 16,6% (2012/2011)	+ 18,87 % (2012/2011)		

Source: MRiRW, USDA FAS, CSO, Meat Market 2011



# Pigs' geography

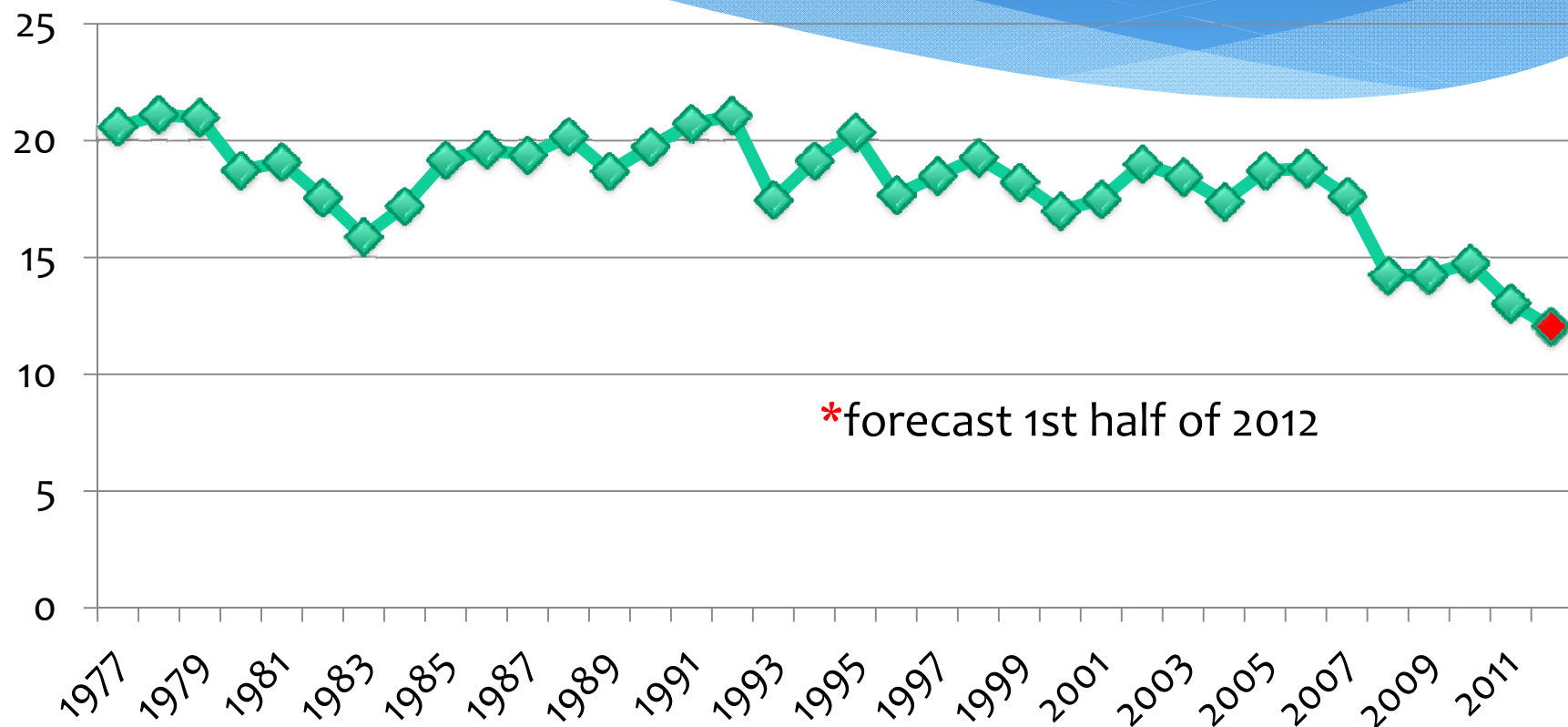


- Autumn 2010 - Autumn 2011 pig production profitability in Poland decreased very rapidly.
- producers reaction was drastic reduction in number of pigs (XI.2006 – 18,8 mio, XI 2010 – 14,8 mio, XI. 2011 – 13,1 mio pigs)
- number of pigs in Poland in November 2011 was the lowest since 1964
- BGŻ forecasted 12,1-12,7 mln pigs by the end of March 2012.
- increasing feed prices do not give a possibility to reverse downward trend in 2012.



# Number of pigs in mio heads (*Rynek mięsa, September 2011*)

Pigs' population very small – serious fight for fatteners

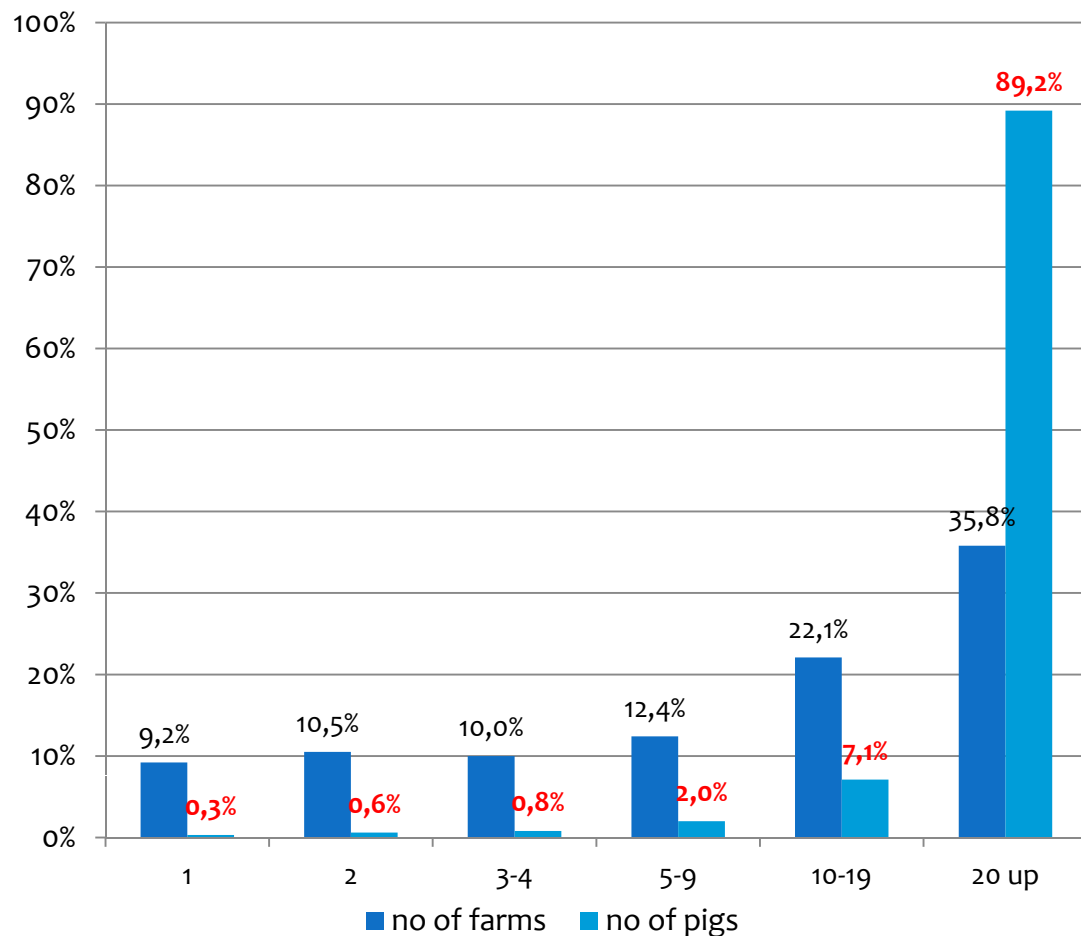


\*forecast 1st half of 2012



# Pig farms in Poland

2011



	No of pig farms	No of farms producing piglets
2002	760 600	452 300
2010	397 700	251 900
Change y/y	-47,7%	- 55%



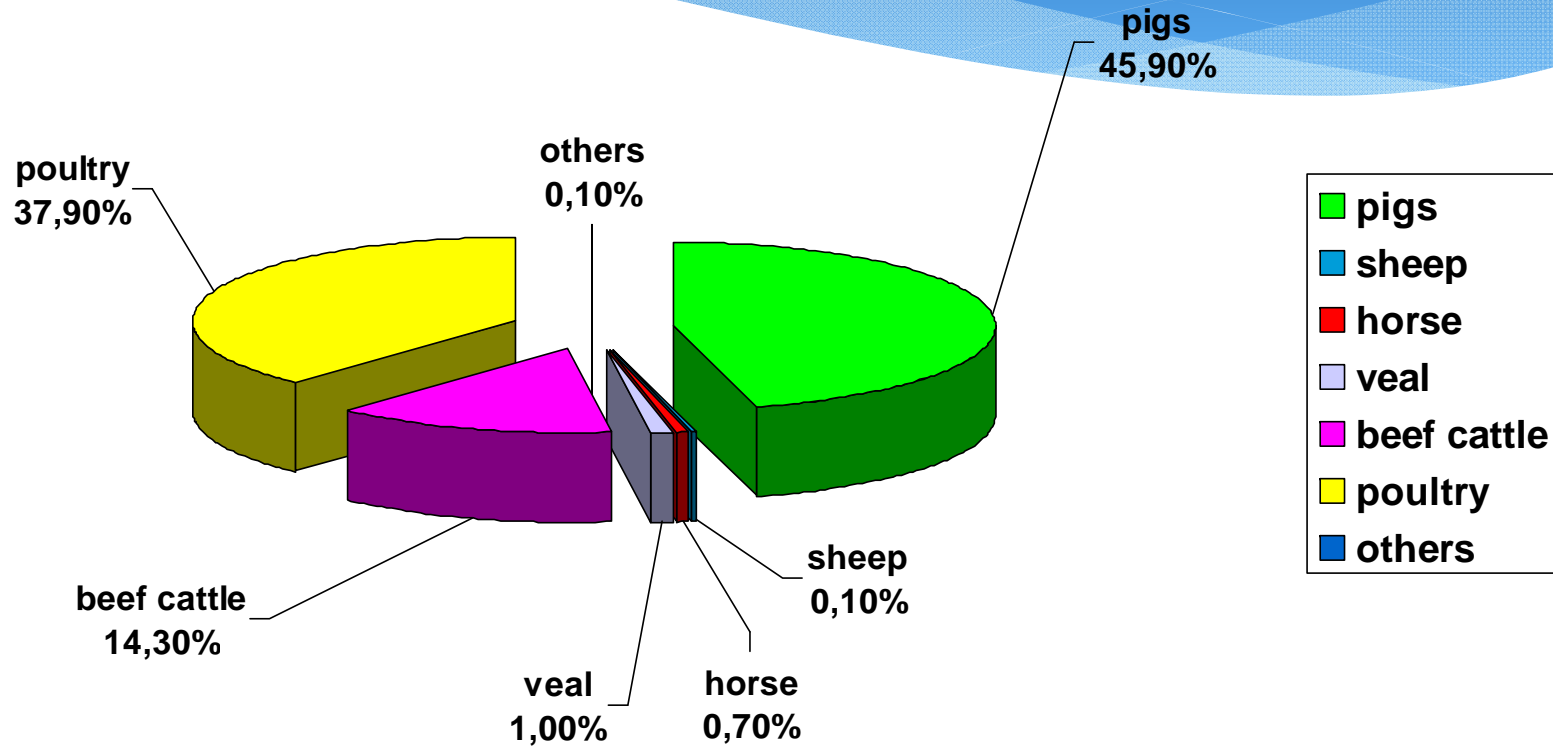
# Pig farms structure (CSO)

No of pigs per farm	Farms share, %						Pigs share %					
	2000	2005	2007	2008	2009	2010	2000	2005	2007	2008	2009	2010
1	8,2	11,1	8,1	8,8	10,2	10,3	0,4	0,4	0,3	0,3	0,4	0,3
2	14,6	14,4	12,7	13,6	13,7	12,7	1,4	1,1	0,9	0,9	0,9	0,7
3 - 4	12,1	12,7	10	11,5	9,8	10,9	2	1,8	1,2	1,4	1,1	1,0
5 - 9	16,1	15,2	12,9	12,7	13,6	14,8	5,4	4,1	2,9	3,0	3,2	2,6
10 - 19	21,4	18,9	20,5	21,6	20,2	18,6	14,2	10,2	9,2	10,3	9,2	6,5
20 - 49	18,5	17,4	20,9	20,0	19,3	18,5	26,8	20,8	19,8	24,0	19,7	14,7
50 - 99	6	6,3	8,5	6,6	7,5	7,8	19,4	17,1	19,1	16,2	17,1	13,9
100 - 199	2,3	2,7	4,2	3,2	3,6	3,9	14,7	14,3	17,1	15,3	16,7	13,4
200 - 499	0,7	1	1,9	1,6	1,7	1,9	9,3	11,9	18,1	15,3	16,5	14,2
500 and more	0,1	0,3	0,3	0,4	0,4	0,7	6,4	18,3	11,4	13,3	15,2	32,8

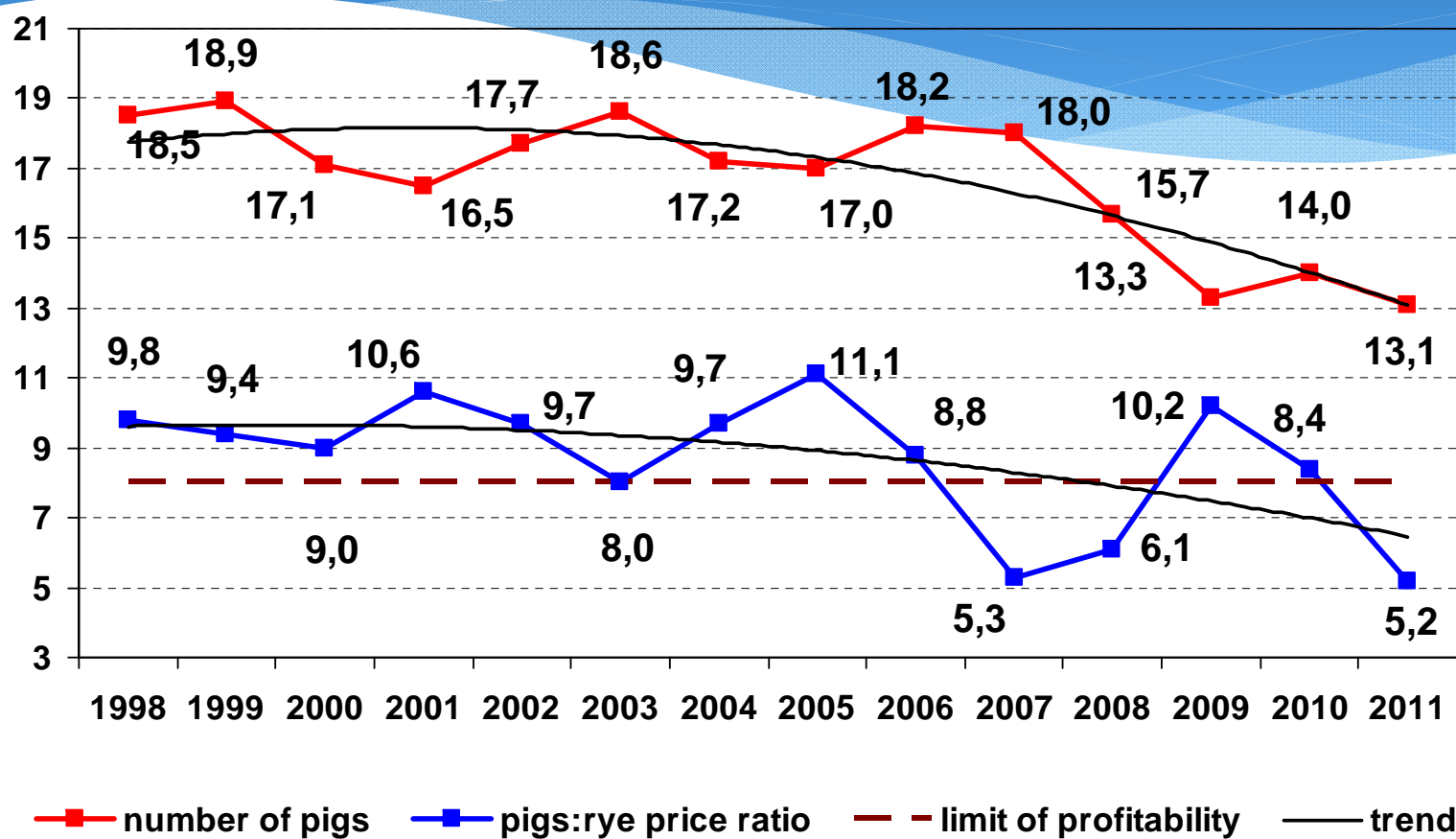




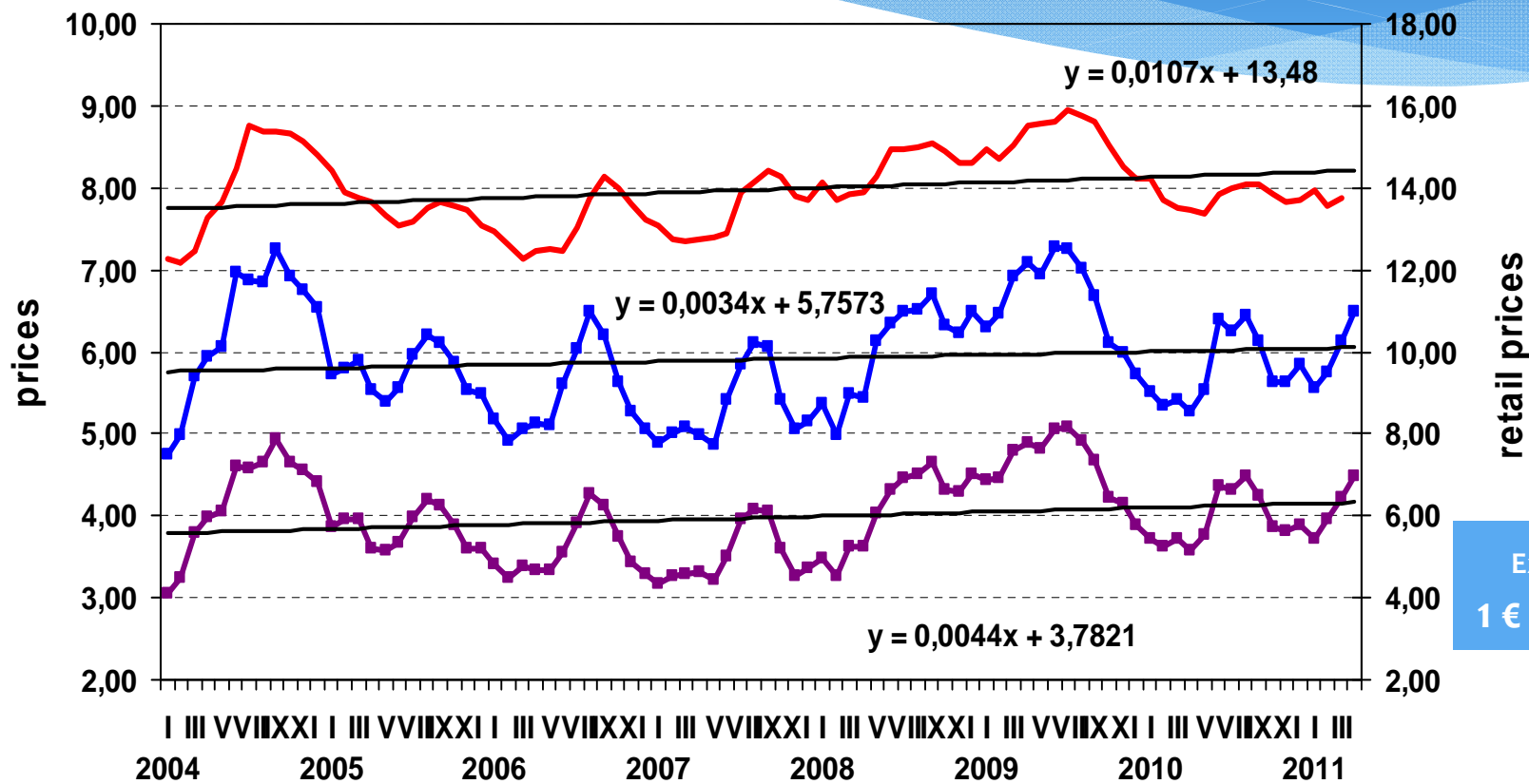
# Structure of production – animals for slaughter according to specie 2010 (CSO)



## Number of pigs (mio heads) and yearly average profitability of fatteners production in Poland 1998-2011



# Fatteners prices and retail prices of meat in Poland



—■— fatteners prices PLN/kg —■— carcasses prices — retail prices raw meat loin — trend



# Pig meat statistics

	Lean meat (%)	Av. carcass weight (kg)	Self-sufficiency (%)	Pork production (mln tonnes)	Retail pork prices
2009	54,6	88,5	93	1,71	+8,2% y/y
2010	54,8	88,7	93	1,86	- 3,3% y/y
2011	55,4	87,5	92	1,86	+7,0% y/y

	Import (1st half)	Export (1st half) y/y	Surplus import over export	Prices for fatteners	Pork production	Retail pork prices
2012 f	+48 (1000T)	- 25 (1000T)	230 (1000 T)	+5-10%	- 12-15% y/y	+14% y/y

Source: Ministry of Agriculture, Meat Market 09.2011



# Prices

## Grain (p. per ton)

2012 (May)	PLN	Euro	Change y/y (%) 2012/2010 2012/2011
Feed wheat	907	209	+ 87,6 - 6,2%
Rye	781	180	+ 134,7 - 0,5%
Barley	884	204	-
Corn	876	202	+ 57,4 - 11%
Oat	736	170	-
Rye-wheat hybrid	873	202	-

## Pigs and pig meat

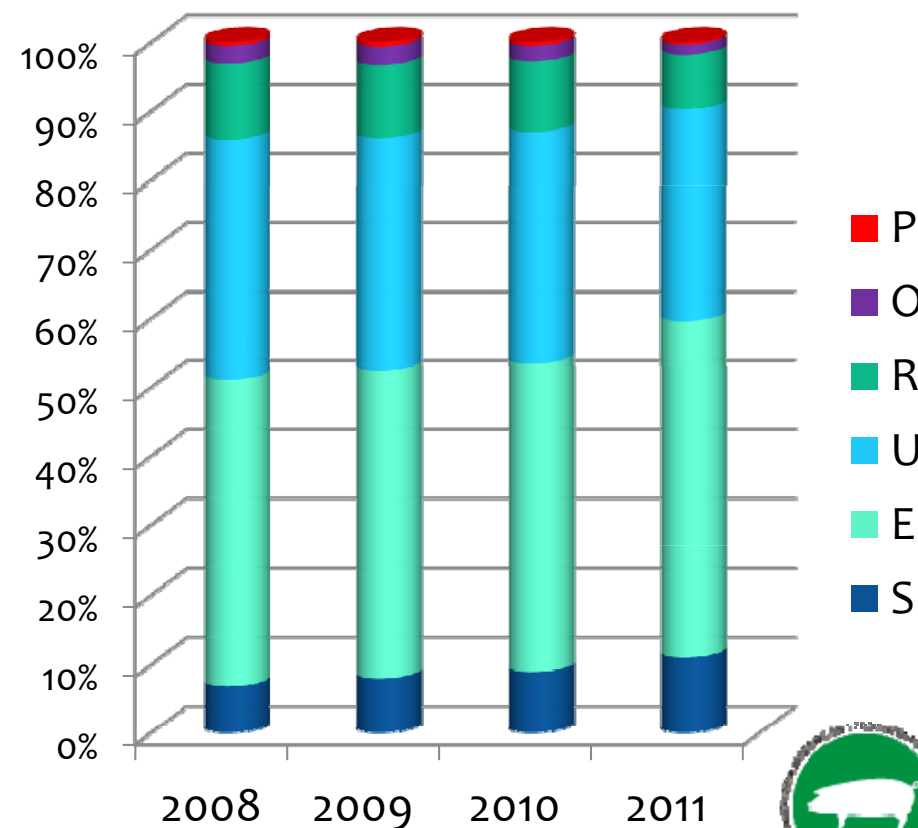
2012 (May)	Piglets (per piece)	Fatteners (kg warm carcass weight class E)	Carcass (kg)	Meat (kg loin w/bone)
PLN	185,11	6,79	7,32	11,88
Euro	42,75	1,57	1,69	2,74

Exchange rate  
1 € = 4,33 PLN



# Carcasses structure according to EUROP classification

%	2008	2009	2010	2011
S	6,8	7,9	8,9	11,0
E	44,3	44,5	44,6	48,6
U	34,7	33,6	33,5	30,6
R	11,1	10,7	10,3	8,0
O	2,6	2,7	2,3	1,5
P	0,5	0,6	0,5	0,3



# Meat consumption in Poland

in kg/person/year

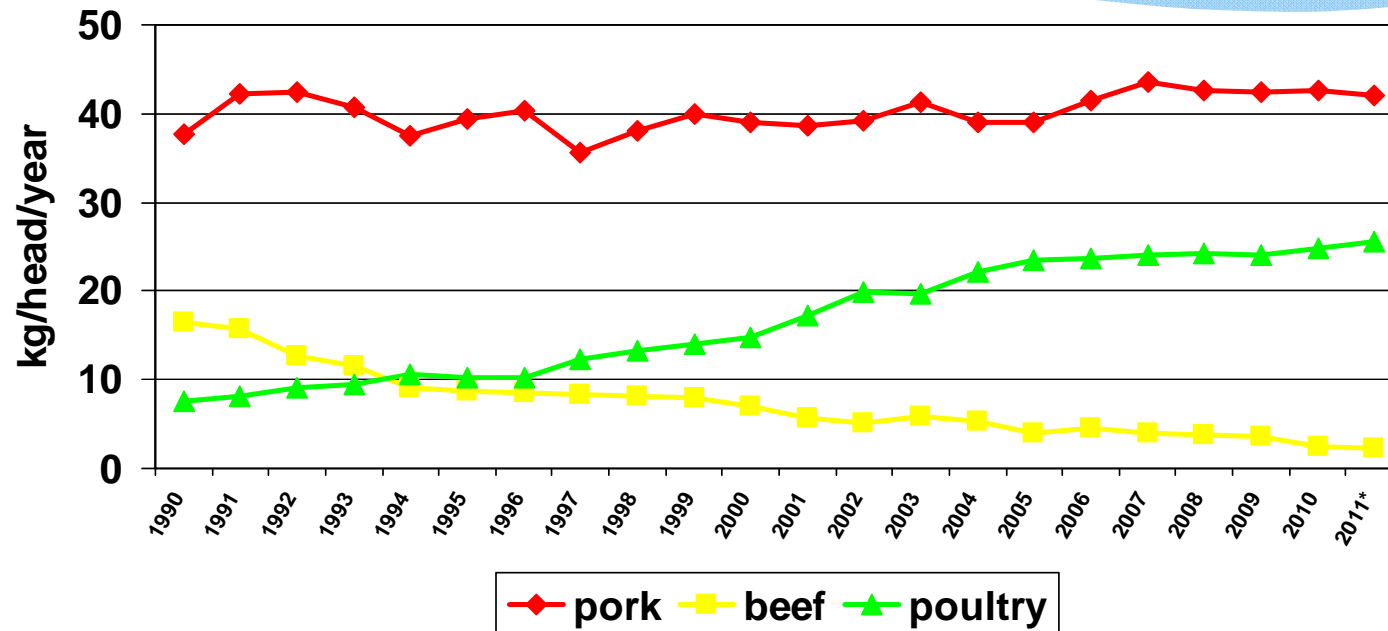
	Total	Beef	Poultry	Pork
2009	75	3,6	24	42,4
2010	74,3	2,4	25	42,6
2011	75	2,3	26	42

Poland	Country size	Country population	Position in EU (no of people, size)	GDP (2011)	Inflation (2011)
	312 679 km <sup>2</sup>	38,5 mln	6 9	+4,3% +2,5 or 3% (2012 f)	+4,3%



# Meat consumption

## Poland 1990-2011 (Rynek Mięsa, September 2011)

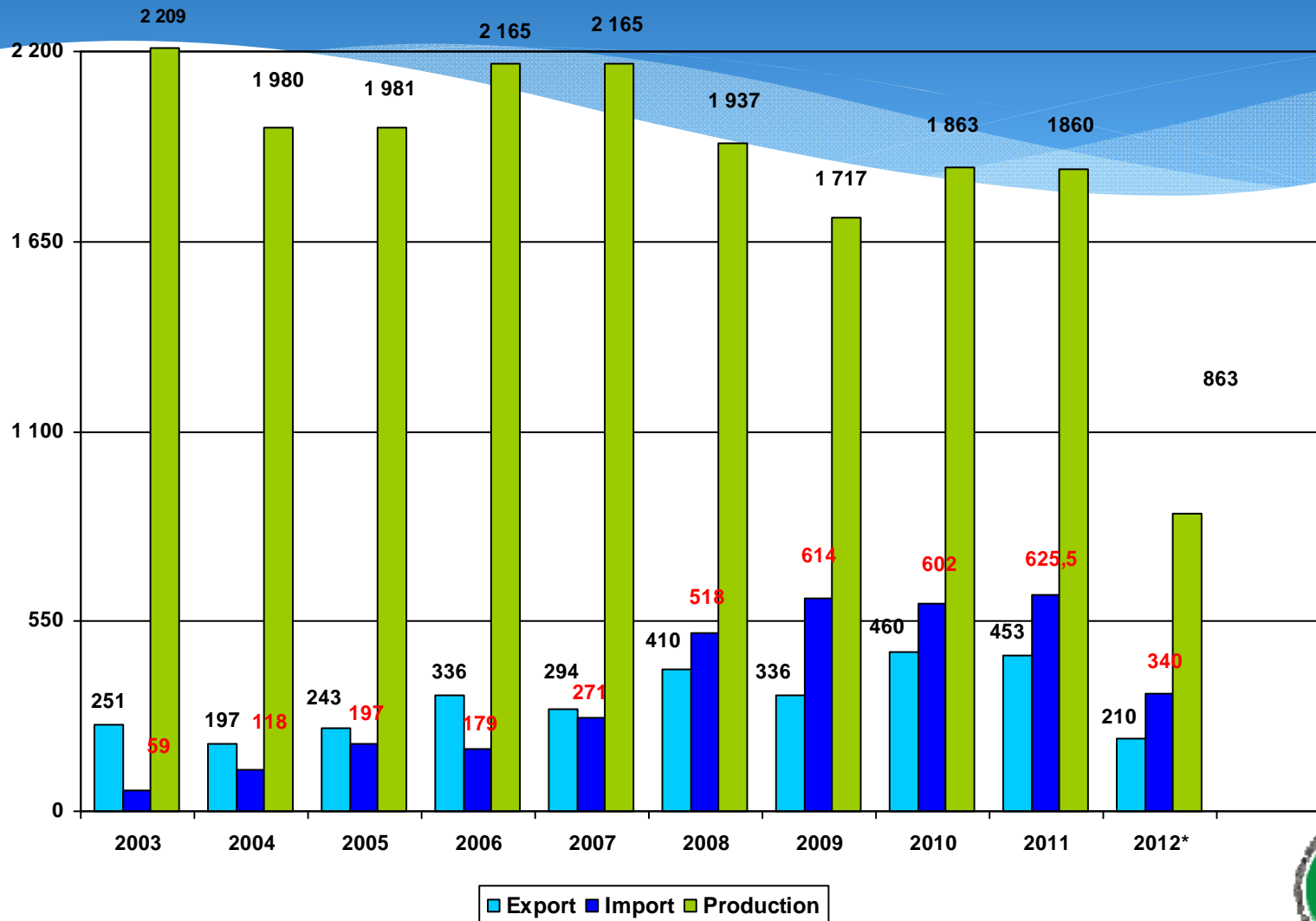


\* Forecast, IERiGŻ-PIB





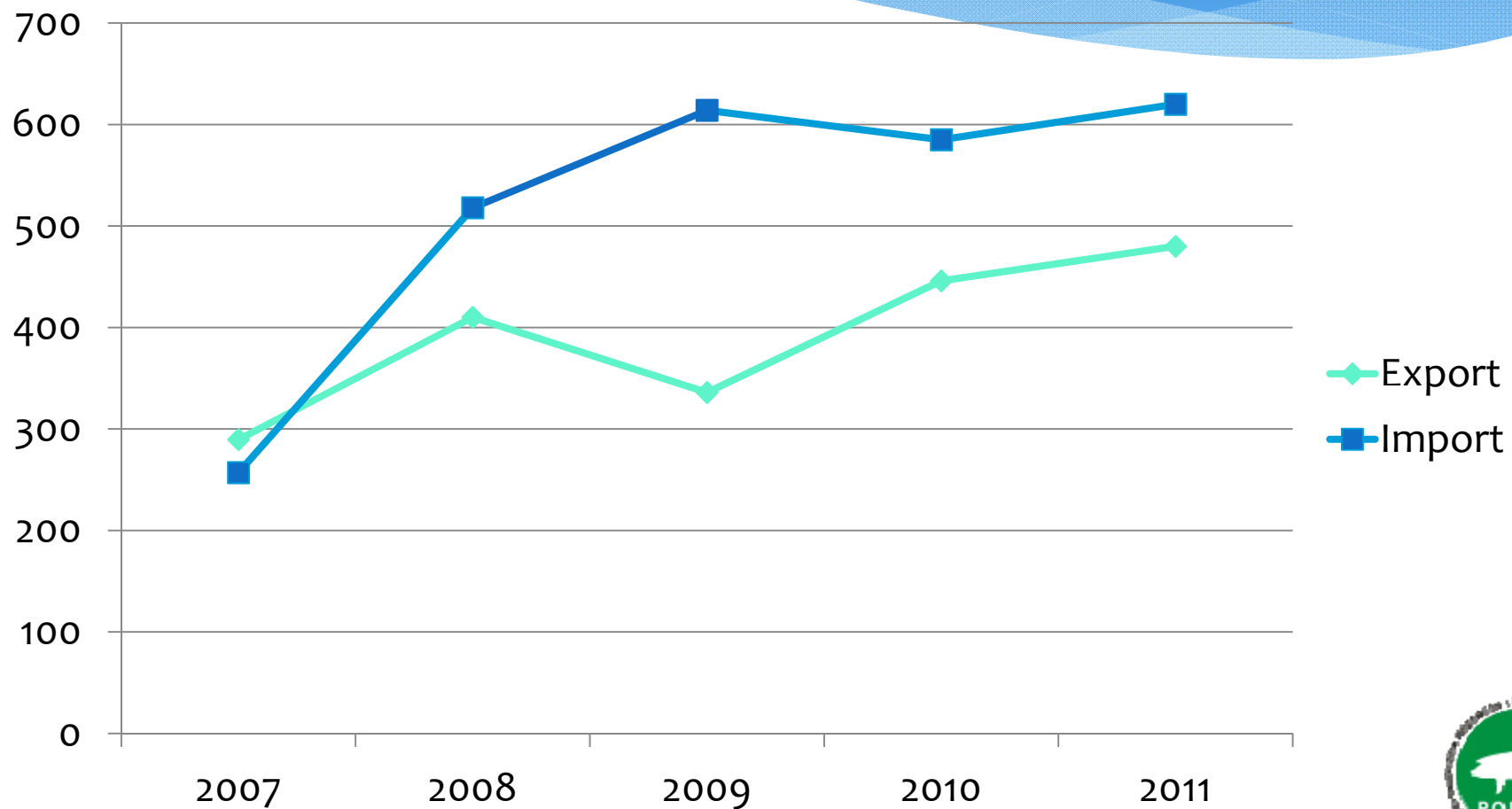
# Pork production, export and import, Poland 2003-2012 (thousand tonnes)



\* Forecast, IERiGŻ-PIB, Rynek Mięsa, September 2011

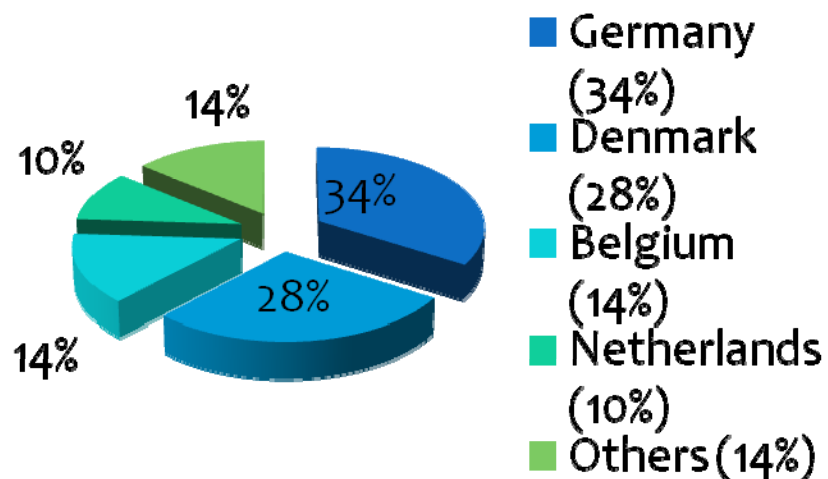
# Pork trade

in thousand tonns

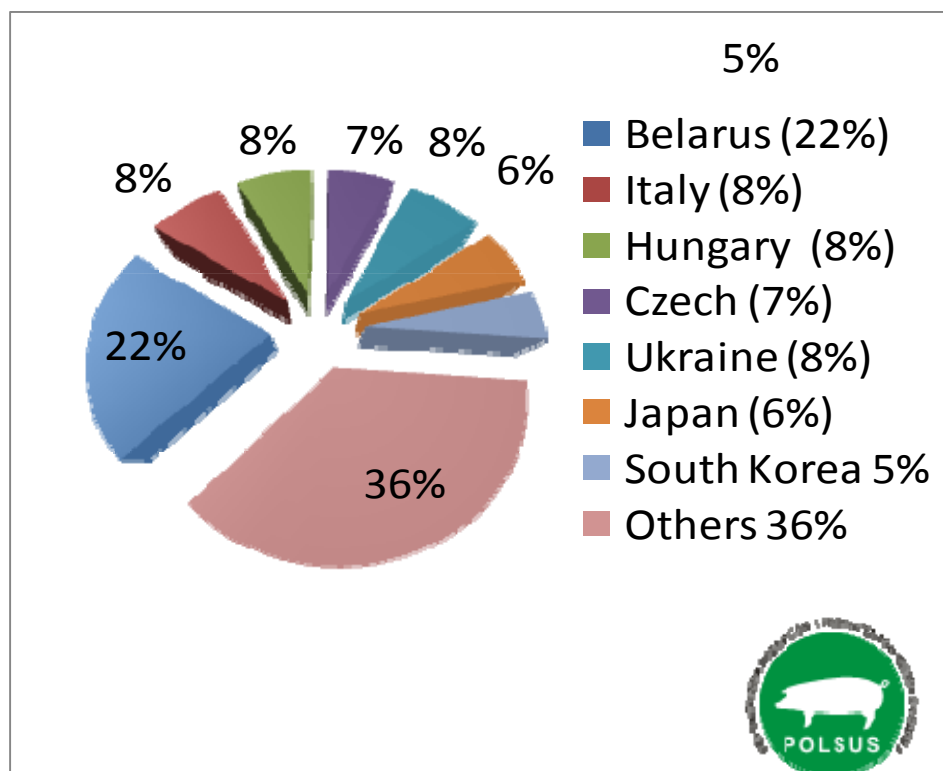


In the last 8 years volume of import increased almost 12 times!  
 Surplus of import over export is 172,5 thousand tonnes

**2011 Pork import**  
 625,5 thousand tonnes



**2011 Pork export**  
 453 thousand tonnes



# Pig castration

- \* **Poland has not signed European declaration on alternatives to surgical castration of pigs yet**
- \* **EuroGroup for Animals is very active in this matter in Poland**
- \* **There is no customers' pressure on retailers to provide pork from uncastrated boars**
- \* **Polish customers are very picky about pork and sensitive to boar taint because it is the most popular meat consumed in Poland**
- \* **Meat market in Poland is still mostly price driven**
- \* *There is a plan to introduce surgical castration ban into Polish legislation (not official yet)*



# Group housing 2013

- ✓ The „new” rule has been obligatory in Poland since May 2004
- ✓ Directive of Minister of Agriculture of 3 September 2003 implemented European requirement into Polish law
- ✓ Farms keeping more than 10 pigs are obliged to keep pregnant sows in groups in new or modernized after January 1, 2003, farm buildings
- ✓ Some Polish farms has not managed to change group housing into individual pens because of no investment capital



# Group housing 2013, Poland

	10-99 SOWS	100-249 SOWS	250-749 SOWS	over 750 SOWS
No of farms	16 340	561	111	66
No of farms complied with directive 2008/120/EC	12 719	507	107	62
% of complied farms	77,8 %	90,4 %	96,4%	93,9 %

Source: Central Veterinary Inspectorate



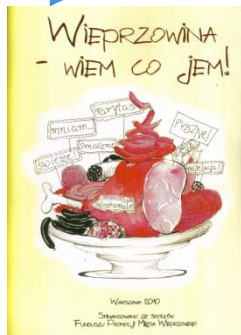
# The latest sector news

## Food Promotion Funds in Poland

- \* Since 2009 Polish Agricultural Market Agency has been managing 9 Food Promotion Funds and Pork Promotion Fund (PPF) is one of them
- \* PPF is supplied by pig breeders and producers in the amount of 0,1% net price of total pigs sold to Polish slaughterhouses (total budget in 2011 was 8,8 mln PLN/ 2,2 mln Euro, 2012 f – 9 mln PLN/ 2,25 mln Euro)
- \* Main goal of PPF is promotion of pig meat on Polish and foreign markets
- \* The following subjects might be sponsored by Pork Promotion Fund:
  - projects to inform and educate consumers on pork nutritional value and quality
  - projects to train farmers and meat industry crew
  - projects to support scientific research in pig and pork sector



# „POLSUS” projects sponsored by PPF



## PPF 2010

First edition of educational brochure:

**„Pork – I know what I eat!”**

Brochure is a guide and a how-to book for consumers about pig and pork production, pork quality and its nutritional value. There are a lot of useful and funny recipes for pork based meals as well as good advice on buying fresh meat

It was distributed at different regional agricultural exhibitions and national animal exhibition Polagra Farm in Poznan

## PPF 2011

- \* Reedition of educational brochure distributed in all high schools and agricultural universities country wide
- \* TV program on national public channel about pork – 10 episodes with chiefs, nutritionists, medical doctors, dieticians and pig breeders talking about pigs and pork. Special survey among citizens about their attitude towards pork. Each episode was about different pork cut or pork product eg. very controversial hot-dog sausages readily consumed by kids
- \* Designing and introducing the new ZP (Zwei Punkten) method of linear carcass lean meat estimation for small and medium slaughterhouses





## Pork Quality System (PQS)

- \* PQS was established by „POLSUS” in cooperation with Polish Meat Association
- \* On December 11, 2009 it was officially recognized by Polish Minister of Agriculture as a national food quality system
- \* PQS is a new proposal of a complex high quality food production system
- \* PQS embraces whole production chain (breeding, production, slaughtering, meat processing and distribution)
- \* PQS main goal is to produce lean pig meat (culinary pork, packed) with important for consumers and processors meat quality parameters (colour, IMF, drip loss)
- \* PQS is in accordance with EU regulation EC No 1974/2006 *article 22 par. 2*



### PQS guarantees:

#### 1. High quality pork

*Fresh longer, of better culinary and process usefulness, savoury and attractive to consumers; pork with proper colour, water capacity and IMF content*

#### 2. Transparency and full traceability

3. Credibility – two stage control system:  
*selfcontrol and independent control of certification body accredited according to PN EN 45011 norm*

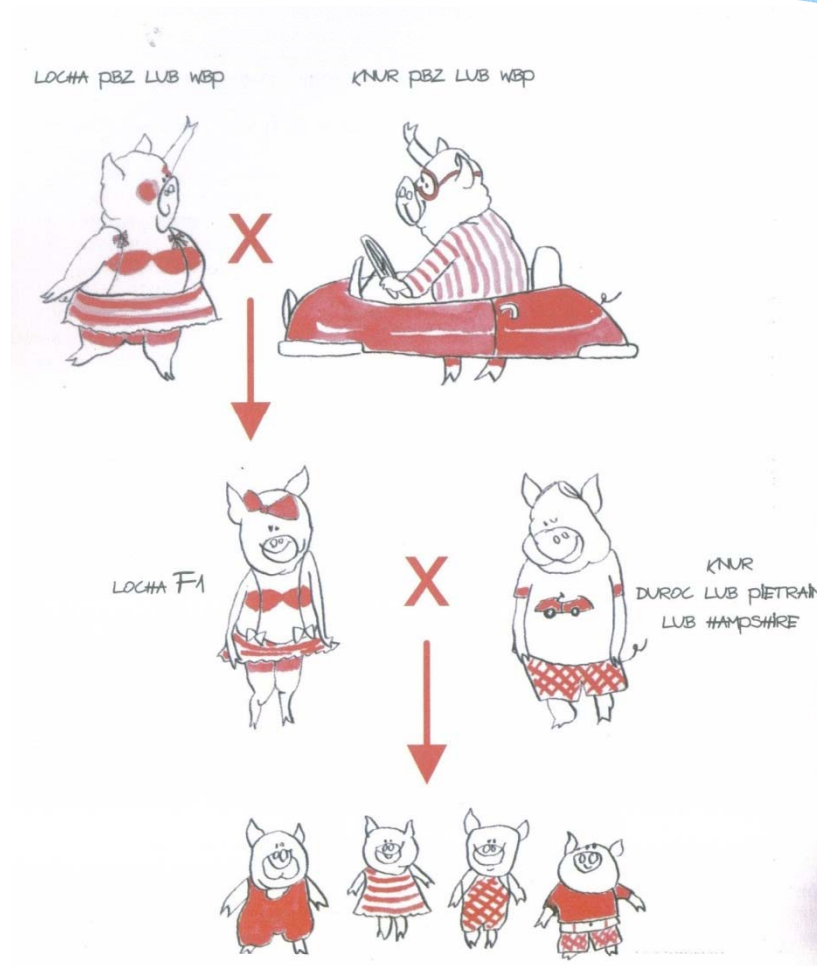
4. PQS is a voluntary and open system

5. PQS is an answer to current and future market demand



*„May you live in interesting times”*

Chinese curse



**Thank you for your attention!**