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INSIDE:

Swine disease, labor shortage on the minds of pork producers

Please see page 12

PORK ISSUE

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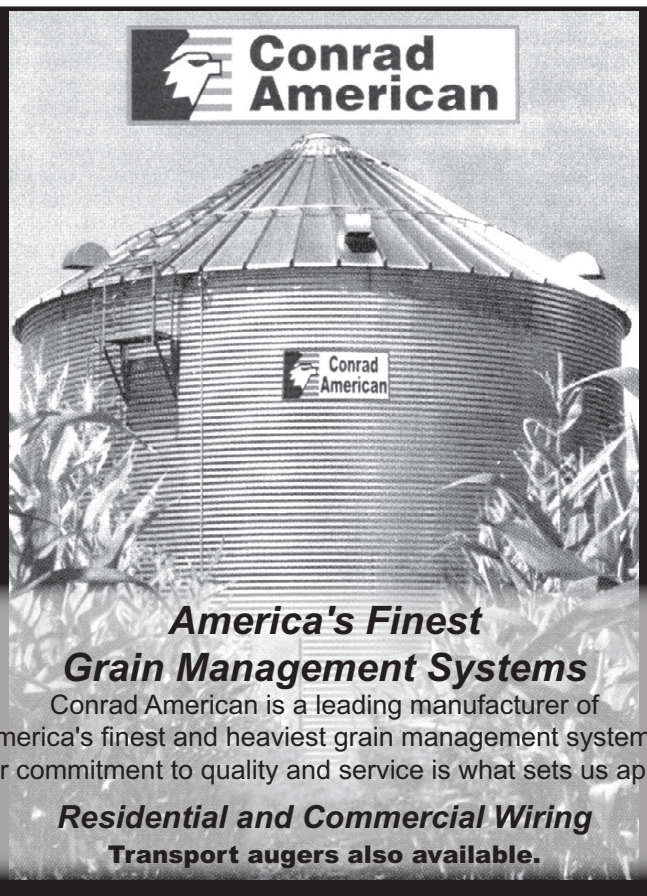

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Pork industry issues and opportunities

The pork industry has undergone significant changes over the last several decades, transforming from a commodity-oriented industry that relied largely on family labor to a more capital-intensive, science-and-technology-driven industry producing products for many diverse consumers. The industry also faces considerable challenges in the coming years as it works to capture opportunities of increased consumer expectations and expanding markets for U.S. pork.

Industry Size and Structure | The average U.S. farm size has increased in recent years, though the trend toward fewer farms has slowed. In fact, from 2012 to 2017, the number of hog farms in the United States increased by almost 3,200.

However, as global market conditions and competing demand for feed grain inputs push production costs higher, effective marketing, financial planning and risk management strategies are becoming necessary ingredients for industry survival. Producers of all sizes are asking if they are large enough, and contract production arrangements are becoming increasingly popular. It remains true that effective management is key to success regardless of farm size or structure.

The family farm remains the dominant business structure for the U.S. hog industry. Family farms comprise 96% of all U.S. farms with hogs and account for 81% of the hog inventory, according to the 2017 Census of Agriculture Farm Typology report.

Regardless of the size or ownership of the enterprise, hog and pork production does create economic activity in the state and community where it is located. If the firm is not locally owned, the profits may not remain entirely in the community. However, major inputs (feed, labor, utilities, trucking, services, property taxes, etc.) will likely still be provided locally or within the region.

Animal Health and Biosecurity

Domestic disease pressure has heightened in recent years, which has led to a lag in productivity growth (pigs per litter, farrowings per sow, etc.). Staying prepared and having well-thought-out animal health and biosecurity programs in place remain critical to protecting against new, emerging and foreign diseases. Genetic technology has advanced in recent years, and reducing disease pressures may allow potential productivity gains to be realized. In addition, the industry must remain diligent in its efforts to prevent an outbreak of African swine fever (ASF) inthe United States. Such an outbreak would be a devastating animal health crisis with extremely negative implications for market prices, export opportunities and the overall economy.

Worker Shortages

Increased levels of production and the adoption of new technology have supported a greater demand for skilled, full-time workers on hog farms. Pork packing and processing plants also require more workers to operate at full, optimal capacity levels. However, maintaining adequate staffing levels on farms and in processing plants has been increasingly difficult in recent years despite higher wage offerings, bonus programs and competitive benefits.

While current tightness in the broader U.S. labor market plays a role, many labor challenges are tied to long-term demographic trends in rural America. Slowing U.S. population growth and increased levels of outmigration have caused populations of rural, farming counties to decline over time while the median age of the rural workforce continues to increase. The result is a shrinking and aging rural labor force that is increasingly unable to fill the workforce needs of the pork industry. Current visa programs that allow foreign-born workers to fill on-farm job openings in other industries are not well-suited for an industry that requires year-round animal care and technical support. Without policy intervention, labor shortages threaten to limit pork production in the years to come, undermining an important sector of the economy.

Exports and Trade

Exports are an important component of overall pork demand. The United States is 1 of 3 top pork producing and exporting countries in the world, accounting for about 26% of global pork exports in 2021.

Despite rising breakeven price levels in recent years, the U.S. remains a relatively low-cost producer with significant natural resources and has been a reliable supplier amid worldwide supply chain issues. These are all important considerations for global buyers. More than 25% of all U.S. pork is exported, adding over $62 per head to the value of each hog marketed. Expanding market access by removing nontariff trade barriers for U.S. pork will be important for future industry growth. Relationships with major trade partners must be solvent for trade to remain the important component it is.

Environment and Sustainability

The environmental impact of pork production is an important matter that is not independent of the industry's economic contribution. The most recent retroactive life-cycle assessment of the pork industry shows that U.S. producers have significantly reduced the resources required to produce each pound of pork. According to the U.S. Environmental Protection Agency, hog production accounted for 0.47% of total U.S. greenhouse gas emissions in 2020, making the industry's carbon footprint per pound of pork produced nearly 21% smaller than in 1990.

Because of differences in climate, cropping patterns and manure management practices across the country, uniform environmental standards may have differing regional impacts on hog production. For this reason, the pork industry's sustainability goals and metrics are focused on outcomes rather than specific practices.

As a whole, the pork industry has established goals to continue improving water-use efficiency, soil, land, biodiversity and nutrient management while further reducing the industry's carbon footprint by 2030.

Opportunities for Value-added Production

Markets for products with specific attributes (e.g., organic, antibiotic use, animal housing specifications, etc.) have expanded in recent years. As demand for these types of products increases, different segments of the marketing channel must communicate more closely with one another. This communication, whether formal (via specification contracts) or informal (through market signals) will coordinate to deliver specific characteristics for a given product line. Process-verified programs present additional value-added opportunities for the pork industry. However, it is important that any market growth be based on consumer demand for differentiated products rather than imposed regulations, which inflict significant costs and inefficiencies on producers and the entire pork value chain. Each individual producer will face decisions at the farm level about which product channels they will supply based on the costs and incentives to produce.

Looking Ahead

The future size and structure of the U.S. pork industry will be determined by the individual decisions of more than 60,000 farms, the devoted individuals who operate them and their potential successors. With current demographics, including producer age and an equity distribution skewed to older producers, a large share of productive assets in the pork industry will likely change hands over the next decade. Future policy and educational efforts should be designed not only to encourage and assist beginning farmers entering pork production but also to address long-run challenges and enhance their chances of surviving, prospering and growing as viable farm operators.

Source: National Pork Producers Council U.S. Pork Industry: Current Structure and Economic Importance

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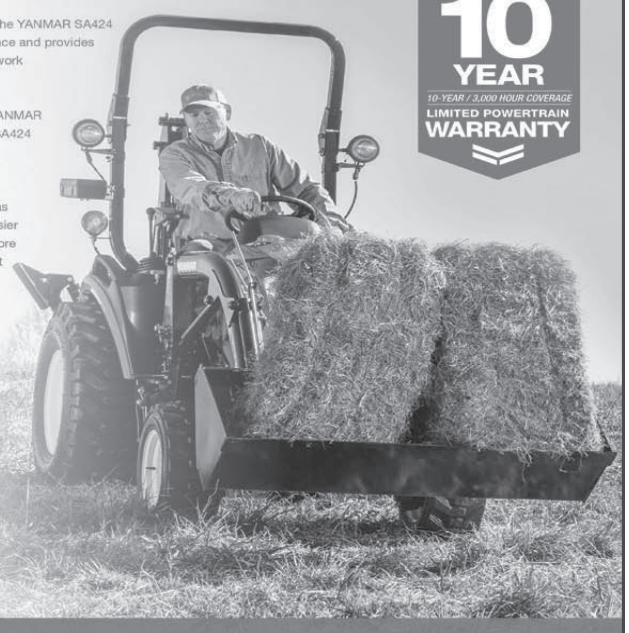

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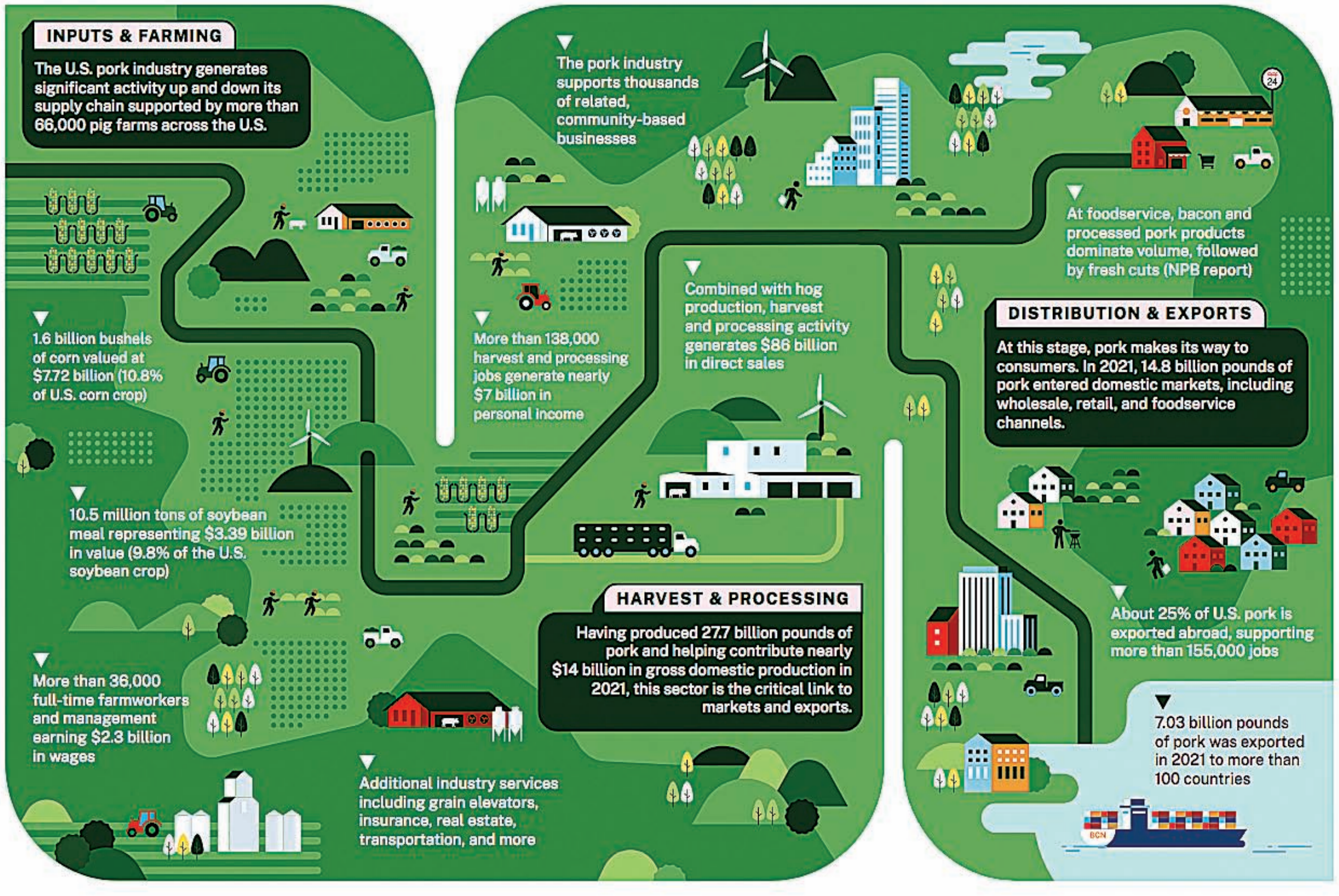

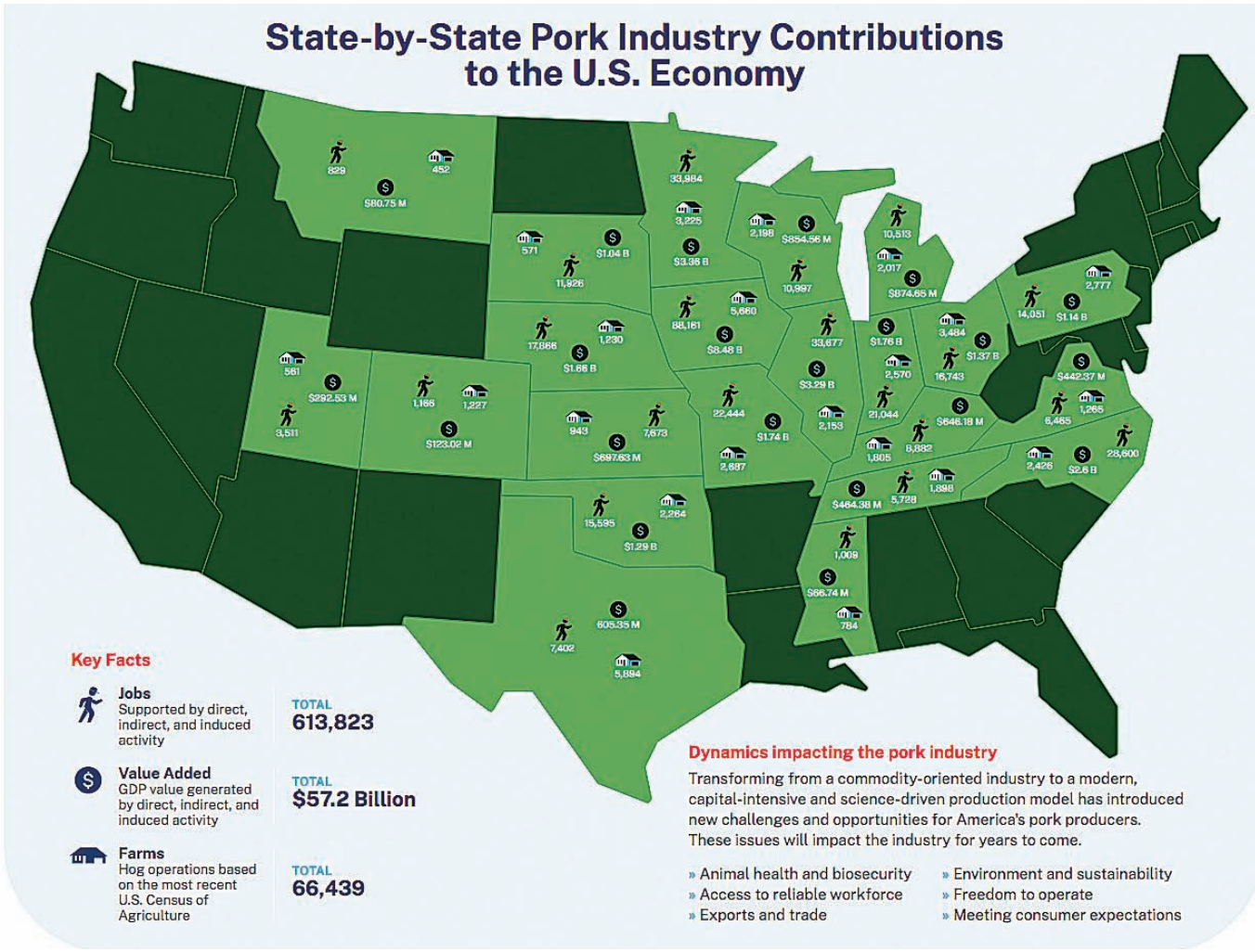

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The U.S. pork industry represents a significant value-add to the agricultural economy and a major contributor to the overall U.S. economy. In 2021, more than 66,000 U.S. pork producers marketed 140+ million hogs valued at over $28+ billion in gross cash receipts. The sales generated from hog marketings and pork processing support a total economic contribution of $35+ billion in personal income, $57+ billion in value added (GDP), and more than 610,000 jobs in the U.S. economy.

Report highlights pork industry contributions to American jobs and the economy

WASHINGTON, D.C. — The National Pork Producers Council (NPPC) released a new economic report highlighting how America's pig farmers are significant contributors to the United States' agricultural and overall economy. The report highlights pork industry value chain contributions and growth over the past five years.

"This report underscores how the pork industry is an important pillar to the U.S. economy and the positive ripple effect it has on many other important sectors in the American supply chain," said Holly Cook, NPPC staff economist. "From farm to fork, the combined economic contribution from hog production and pork processing supports more than 600,000 American jobs and generates $178 billion of direct, indirect and induced sales that equate to $57 billion in value-added GDP."

Key takeaways in the report include:

– The pork industry supports 613,823 direct and indirect jobs in the United States.

– In 2021, more than 66,000 pig farms sold more than 140 million hogs worth over $28 billion in gross cash receipts. And the number of U.S. pig farms has grown since 2012.

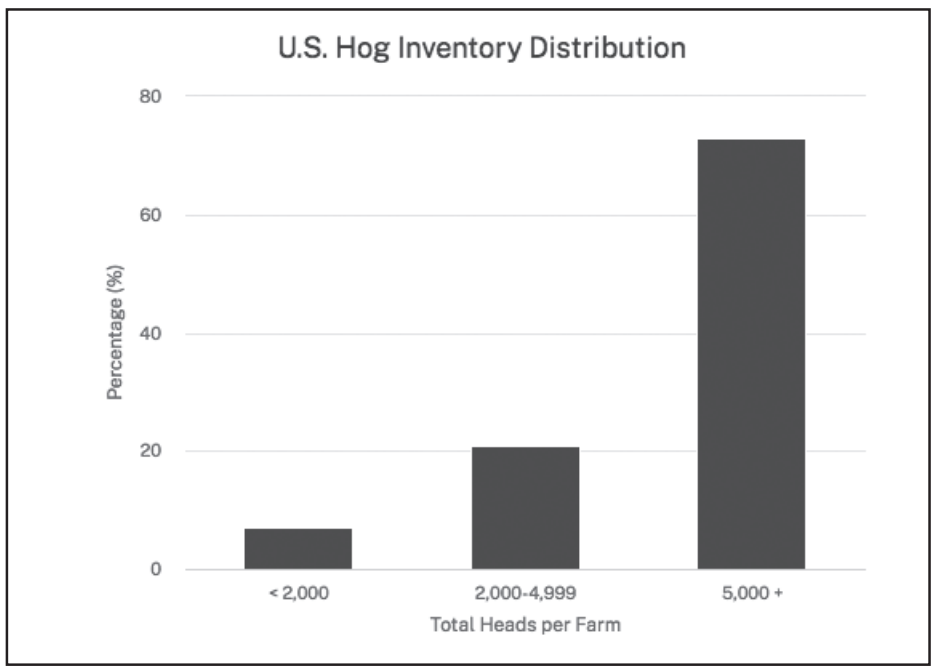
– Farming and processing sectors are responsible for supporting more than $35 billion in personal income and boosts economic activity in related services such as trucking, grain elevators, insurance and other rural-based businesses.

– In 2021, approximately 25% of U.S. pork was exported abroad, which equates to 7 billion pounds of pork valued at $8 billion. In addition, exports added more than $62 per head in value to each pig marketed in 2021.

– The pork industry generates significant economic activity through its purchase of inputs. Feed inputs, such as corn and soybean meal, account for an estimated 56% of total U.S. production costs.

"It's vital to share this economic snapshot as America's pork producers continue to engage with regulators and policymakers, food companies and others to convey how our businesses directly and indirectly impact the larger economy," said Terry Wolters, NPPC president and owner of Stoney Creek Farms in Pipestone, Minnesota "As a producer, this analysis makes me proud to see the impact I have being part of the thriving U.S. pork industry."

In addition to the national report, NPPC released 22 state-level economic reports. These reports highlight how the pork industry contributes at a grassroots level and shows the breadth of the industry producing affordable, safe and nutritious pork for consumers here and abroad.



Approximately seven percent of U.S. hogs are on farms with less than 2,000 head in total inventory and 93 percent are on farms with 2,000 or more hogs. Family farms comprise 96 percent of all U.S. hog farms and 81 percent of hog inventories.
<2,000 head = 58,115 Farms
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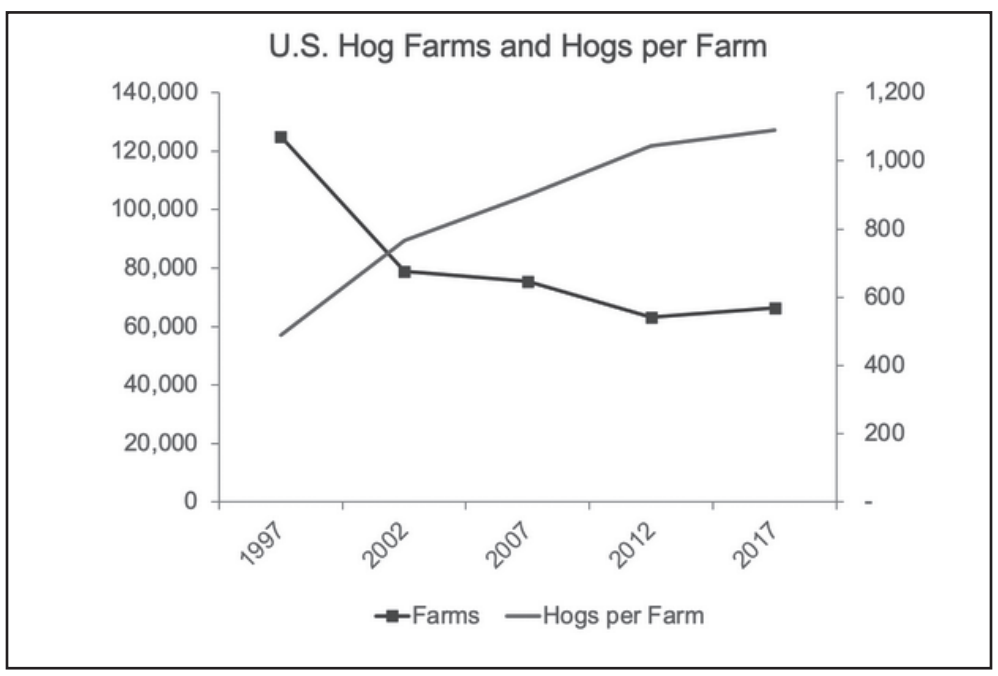
Source: National Pork Producers Council



The most recent USDA-NASS Census of Agriculture shows that the number of farms raising hogs increased by nearly 3,200 from 2012 to 2017. There are now 66,439 U.S. hog farms with an average inventory of 1,089 hogs per farm.

Thank You!

We salute all who are involved in the farming industry - because of them, we have abundant food on our tables.

We would like to shout out a huge thank you to everyone who works and volunteers in ag-related organizations and businesses.

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Swine disease, labor shortage on the minds of pork producers

by Elizabeth A. Elliott, Editor

PORTSMOUTH — When Trevor Langenfeld and his father, George, head to their farm in Portsmouth, they take extra precautions to ensure the health and safety of the pigs they care for.

"The biggest thing this year has been pig health," Trevor said. "We've been lucky down here. We shower at home and make sure we don't bring any disease from another hog site."

Trevor and George don plastic boots over their shoes before going into their site.

"We walk the pigs every day and make sure they're all getting feed and water," Trevor said. "We get them shots if they are getting sick."

An early morning starts at Langenfeld Farms with checking the water meters.

"If they're drinking less water we can tell the pigs may be getting sick a day or two ahead of time," Trevor said.

The Langenfelds, like many others in the country, are concerned about a particular disease.

"We are watching a foreign animal disease called African Swine Fever," said David Stender, swine specialist with the Iowa State Extension and Outreach office. "It's been spreading around the globe."

Trevor Langenfeld

Stender said it hit North America a year ago.

"The whole industry is trying to prepare in case it does jump across into the continental U.S.," he said. "We export a lot of pork, with one out of every four pigs getting exported to another country."

Stender said if we get this disease, then those countries will shut down the exports for at least a little while.

"That will cost the U.S. pork industry billions and billions of dollars. That's on the producers' minds — that and scarcity of labor," he said. "What we are finding is long hours and stress, doing it with a short crew and asking them to work harder. It's a tough situation."

Langenfeld Farms is run by Trevor and George, who work with over 4,000 pigs. Trevor, like George, followed in his father's footsteps and stayed with farming.

"Livestock is labor intensive," said George. "Finding the people and getting people to work is tough."

Photos by Elizabeth A. Elliott