Short supply chains in the European pig meat sector

April 6 2022 - Pig Meat Reflection Group

European Coordination Via Campesina

Definition Short Supply Chains

“Supply chains involving a limited number of economic operators, committed to cooperation, local economic development, and close geographical and social relations between food producers, processors and consumers.”

The EU’s rural development regulation (1305/2013)

European Pig Meat Sector

The sector is characterized by enormous heterogeneity in rearing methods throughout European Member States and numbers of animals per farm…

… from the simplest systems that require minimal investment to large-scale market-oriented enterprises…

…from forest rearing of indiginous breeds in Sicily to mega-farms in central Denmark.

European Pig Meat Sector

“Overall, over 75 % of EU pigs are in large commercial holdings. Among the top nine producer countries, Denmark has the largest commercial holdings with an average of 4 700 heads and Germany the smallest with an average of 1 900 heads per holding.

The number of EU farm holdings keeping pigs has decreased over the years, from 3.8 million in 2005 (excluding Croatia) to just under 2.2 million in 2013. However, as the number of pigs has not dropped in an equal proportion, this means that the average herd size has increased.“

Briefing on pig meat sector, European Parliament, 2020

EU - high density pig farming zones:

Distribution of pig farms is not homogenous is concentrated on few european regions:

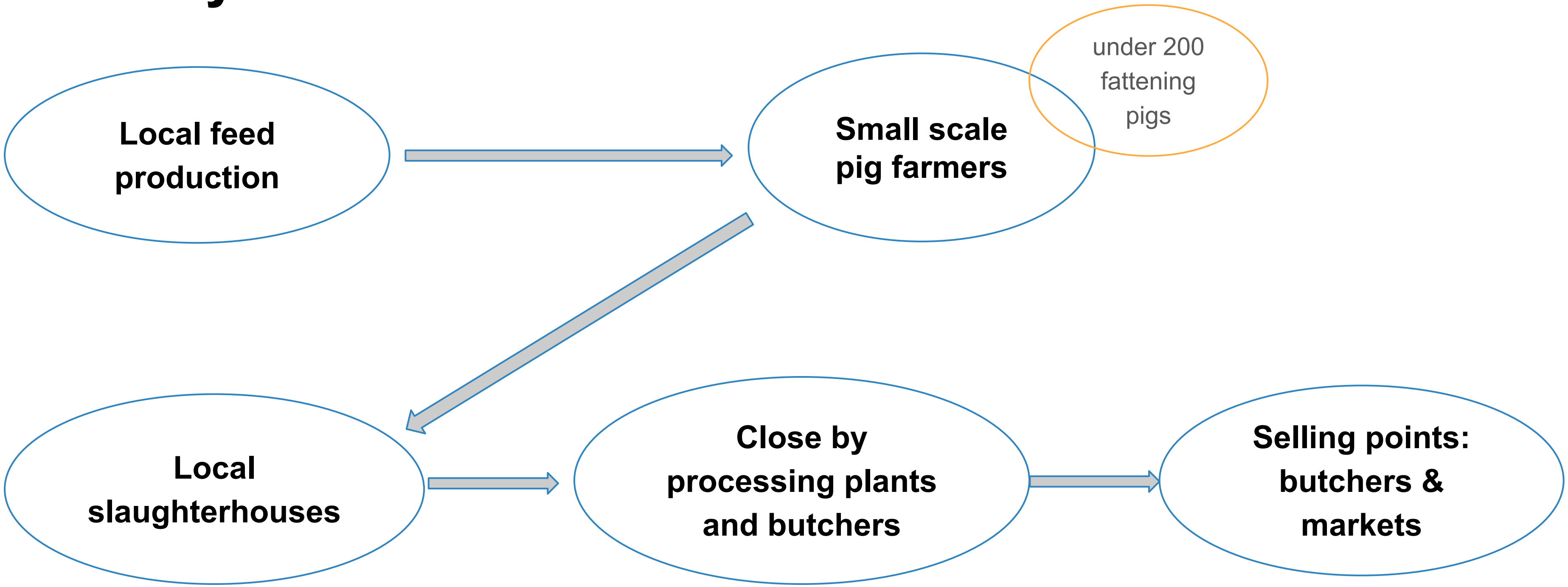
- Often in flat lands, close to sea ports, for feed imports (less transport costs)
- Denmark
- The Netherlands
- Belgium
- Germany
- Catalonia, Aragon and Murcia (Spain), Brittany (France), Lombardy (Italy) and Wielkopolskie in central Poland

Briefing on pig meat sector, European Parliament, 2020

What is small scale?

The invisible sector

Pig meat producers and local retailers linked to their territory…



Pig production 2016 - Total

Pig Farms divided in herd size categories

2016

8032100 00

Member State	livestock from ... to .. pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
			Number of Pig farmers in 1 000			
BE	0.2	0.1	0.1	0.2	3.9	4.5
BG	29.0	0.8	0.1	0.0	0.1	30.0
CZ	2.6	0.8	0.2	0.1	0.4	4.0
DK	0.3	0.2	0.0	0.1	2.7	3.3
DE	**9.7**	**4.6**	**2.5**	**2.4**	**21.1**	**40.2**
EE	0.1	0.0	0.0	0.0	0.1	0.2
IE	1.0	0.1	0.0	0.0	0.3	1.4
GR	15.4	1.7	0.4	0.2	0.3	17.8
ES	24.0	4.6	1.8	1.8	12.7	44.9
FR	4.1	1.7	0.8	0.8	9.1	16.3
HR	39.6	13.7	1.1	0.3	0.2	54.8
IT	15.0	5.4	1.0	0.5	3.1	24.9
CY	0.3	0.1	.	.	0.0	0.4
LV	10.6	0.8	0.1	0.0	0.1	11.5
LT	31.1	0.7	0.0	0.0	0.1	31.9
LU	0.0	0.0	0.0	.	0.1	0.1
HU	100.3	9.5	0.8	0.3	0.6	111.5
MT	.	0.0	0.0	0.0	0.1	0.1
NL	0.2	0.1	0.1	0.2	3.9	4.5
AT	17.5	2.3	0.9	1.1	4.6	26.3
PL	68.7	70.0	17.0	8.7	7.8	172.2
PT	36.0	2.4	0.5	0.3	0.5	39.7
RO	1 268.8	14.4	0.2	0.0	0.2	1 283.6
SI	19.7	2.3	0.3	0.2	0.2	22.6
SK	5.4	0.6	0.1	0.0	0.1	6.2
FI	0.0	0.0	0.0	0.1	1.0	1.2
SE	0.3	0.1	0.1	0.0	0.7	1.3
UK	3.7	2.2	0.7	0.5	2.4	9.5
EU - 27	**1 663.9**	**125.3**	**27.4**	**17.8**	**75.9**	**1 910.3**
EU - 28	**1 703.4**	**139.0**	**28.4**	**18.1**	**76.2**	**1 965.1**

Pig Farms divided in herd size categories

2016

8032100 00

Member State	livestock from ... to .. pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
			Number of pigs in 1 000			
BE	0.9	3.0	5.0	32.6	6 137.5	6 179.0
BG	48.2	13.9	3.9	5.5	566.9	638.4
CZ	6.7	16.4	11.7	14.5	1 493.0	1 542.2
DK	1.2	3.8	2.6	7.8	12 367.7	12 383.0
DE	**32.6**	**110.4**	**165.7**	**331.1**	**28 013.1**	**28 653.0**
EE	0.2	0.6	0.5	0.9	277.8	279.9
IE	2.9	0.9	0.5	1.4	1 598.1	1 603.9
GR	32.3	33.7	23.4	21.4	658.3	769.1
ES	62.7	103.8	124.3	253.1	23 402.6	23 946.5
FR	13.0	38.5	52.6	113.7	13 381.4	13 599.2
HR	155.4	267.8	69.9	40.7	411.2	944.9
IT	50.5	108.7	64.7	64.8	8 086.9	8 375.5
CY	1.0	0.8	0.2	.	263.1	265.1
LV	26.6	15.1	4.1	3.8	311.5	361.1
LT	89.8	10.9	2.3	1.5	522.9	627.3
LU	0.1	0.3	0.4	0.3	91.2	92.3
HU	270.7	164.8	51.4	47.3	2 444.6	2 978.8
MT	0.0	0.3	0.8	3.6	37.0	41.6
NL	0.6	2.7	6.8	32.0	12 436.5	12 478.6
AT	42.0	53.4	64.3	167.0	2 557.1	2 883.9
PL	285.1	1 583.4	1 181.2	1 194.4	6 738.8	10 982.8
PT	70.1	46.4	32.5	39.3	1 686.9	1 875.1
RO	2 044.2	213.5	13.6	3.9	1 867.7	4 142.8
SI	57.5	44.8	20.3	27.9	123.0	273.4
SK	14.5	10.8	5.1	5.0	448.6	484.0
FI	0.1	0.9	2.8	20.5	1 210.6	1 234.9
SE	1.2	2.8	3.3	6.1	1 340.9	1 354.3
UK	12.5	50.3	45.9	74.7	4 361.3	4 544.8
EU - 27	**3 166.8**	**2 634.9**	**1 889.9**	**2 473.9**	**132 424.8**	**142 590.4**
EU - 28	**3 322.2**	**2 902.7**	**1 959.8**	**2 514.6**	**132 836.0**	**143 535.3**

Q u e l l e: EUROSTAT (Stand: September 2020), BLE (414).

https://www.bmel-statistik.de/landwirtschaft/tierhaltung/schweinehaltung

Fattening Pig Farms divided in herd size categories

2016

8032200

Member State	Livestock on farm from ... to ... Fattening Pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
	Number of Farms in 1 000					
BE	0.2	0.1	0.1	0.2	3.8	4.4
BG	27.7	0.6	0.1	0.0	0.1	28.5
CZ	2.3	0.8	0.2	0.1	0.4	3.7
DK	0.3	0.2	0.0	0.1	2.7	3.3
DE	**8.5**	**4.4**	**2.3**	**2.3**	**19.6**	**37.1**
EE	0.1	0.0	0.0	0.0	0.1	0.2
IE	0.8	0.0	0.0	0.0	0.3	1.1
GR	8.9	1.2	0.3	0.2	0.3	10.9
ES	18.6	3.1	1.6	1.6	10.9	35.9
FR	3.6	1.6	0.7	0.8	8.8	15.4
HR	36.3	12.3	1.0	0.3	0.2	50.2
IT	13.9	5.0	0.9	0.4	2.6	22.9
CY	0.2	0.0	.	.	0.0	0.3
LV	9.2	0.8	0.1	0.0	0.1	10.1
LT	26.7	0.5	0.0	0.0	0.1	27.2
LU	0.0	0.0	0.0	.	0.1	0.1
HU	91.9	8.1	0.7	0.3	0.6	101.6
MT	.	0.0	0.0	0.0	0.1	0.1
NL	0.2	0.1	0.1	0.2	3.8	4.4
AT	17.2	2.2	0.9	1.1	4.6	26.0
PL	50.5	57.3	16.5	8.6	7.7	140.6
PT	32.4	2.0	0.4	0.3	0.5	35.6
SI	19.2	2.2	0.3	0.2	0.2	22.0
SK	4.3	0.4	0.1	0.0	0.1	4.9
FI	0.0	0.0	0.0	0.1	1.0	1.2
SE	0.2	0.1	0.0	0.0	0.7	1.1
UK	2.4	2.0	0.6	0.5	2.3	7.8
EU - 27	**339.2**	**92.8**	**26.0**	**17.1**	**71.3**	**546.3**
EU - 28	**375.5**	**105.1**	**27.0**	**17.4**	**71.5**	**596.5**

Fattening Pig Farms divided in herd size categories

2016

8032200

Member State	Livestock on farm from ... to ... Fattening Pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
	Number of fattening pigs in 1 000					
BE	0.7	1.9	3.6	27.4	4 147.9	4 181.5
BG	43.3	7.0	1.7	2.8	418.5	473.2
CZ	5.6	11.2	8.5	10.7	874.4	910.4
DK	0.8	2.3	1.7	6.7	6 818.8	6 830.3
DE	**27.1**	**89.8**	**123.0**	**257.4**	**16 857.6**	**17 354.9**
EE	0.2	0.4	0.4	0.6	138.3	139.9
IE	1.3	0.3	0.3	1.3	1 003.5	1 006.6
GR	15.0	9.6	6.1	6.0	328.6	365.2
ES	39.2	30.5	55.6	134.8	14 185.0	14 445.1
FR	10.4	27.9	38.7	86.6	8 080.0	8 243.5
HR	123.3	102.7	29.7	19.0	269.2	544.0
IT	38.5	61.0	36.9	51.6	5 412.0	5 599.9
CY	0.4	0.2	0.1	.	150.9	151.7
LV	21.7	9.3	2.5	2.4	211.3	247.1
LT	71.3	4.2	1.3	1.2	265.9	343.9
LU	0.0	0.2	0.1	0.1	59.2	59.6
HU	233.6	92.1	32.3	30.6	1 643.5	2 032.1
MT	0.0	0.2	0.5	2.2	24.8	27.7
NL	0.4	2.0	6.2	29.6	5 789.4	5 827.5
AT	39.7	40.3	49.1	122.2	1 602.3	1 853.6
PL	177.3	805.3	678.3	749.5	4 698.0	7 108.3
PT	53.2	13.3	11.4	12.4	964.8	1 055.0
SI	54.6	24.7	9.3	16.2	76.8	181.4
SK	10.4	6.1	3.7	3.9	268.4	292.5
FI	0.1	0.5	1.9	13.7	560.5	576.7
SE	0.7	1.5	1.9	2.9	829.8	836.8
UK	6.5	32.1	29.0	50.9	2 703.6	2 822.0
EU - 27	**851.7**	**1 273.7**	**1 104.1**	**1 623.5**	**78 113.3**	**82 966.3**
EU - 28	**975.0**	**1 376.4**	**1 133.8**	**1 642.5**	**78 382.5**	**83 510.3**

1) Einschließlich Jungschweine und Eber zur Zucht.

Q u e l l e: EUROSTAT (Stand: September 2020), BLE (414).

Pig production European Union (-27) in 2016

	Under 200 heads	Over 200heads	Total
Number Farms	1834340	75910	1910250
Percentage of tota	96.03%	3.97%	
Pigs heads	10165580	132424820	142590400
Percentage of tota	7.13%	92.87%	

Fattening pig production European Union (-27) - 2016

	Under 200 heads	Over 200heads	Total
Farms	1349900	71430	1421330
Percentage of total	94.97%	5.03%	
Pigs heads	6129650	79284320	85413970
Percentage of total	7.18%	92.82%	

Pig production 2016

Pig Farms divided in herd size categories

2016

8032100
00

Member State	livestock from ... to .. pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
	Number of Pig farmers in 1 000					
BE	0.2	0.1	0.1	0.2	3.9	4.5
BG	29.0	0.8	0.1	0.0	0.1	30.0
CZ	2.6	0.8	0.2	0.1	0.4	4.0
DK	0.3	0.2	0.0	0.1	2.7	3.3
DE	**9.7**	**4.6**	**2.5**	**2.4**	**21.1**	**40.2**
EE	0.1	0.0	0.0	0.0	0.1	0.2
IE	1.0	0.1	0.0	0.0	0.3	1.4
GR	15.4	1.7	0.4	0.2	0.3	17.8
ES	24.0	4.6	1.8	1.8	12.7	44.9
FR	4.1	1.7	0.8	0.8	9.1	16.3
HR	39.6	13.7	1.1	0.3	0.2	54.8
IT	15.0	5.4	1.0	0.5	3.1	24.9
CY	0.3	0.1	.	.	0.0	0.4
LV	10.6	0.8	0.1	0.0	0.1	11.5
LT	31.1	0.7	0.0	0.0	0.1	31.9
LU	0.0	0.0	0.0	.	0.1	0.1
HU	100.3	9.5	0.8	0.3	0.6	111.5
MT	.	0.0	0.0	0.0	0.1	0.1
NL	0.2	0.[illegible]	0.1	0.2	3.9	4.5
AT	17.5	2.3	0.9	1.1	4.6	26.3
PL	68.7	70.0	17.0	8.7	7.8	172.2
PT	36.0	2.4	0.5	0.3	0.5	39.7
RO	1 268.8	14.4	0.2	0.0	0.2	1 283.6
SI	19.7	2.3	0.3	0.2	0.2	22.6
SK	5.4	0.6	0.1	0.0	0.1	6.2
FI	0.0	0.0	0.0	0.1	1.0	1.2
SE	0.3	0.1	0.1	0.0	0.7	1.3
UK	3.7	2.2	0.7	0.5	2.4	9.5
EU - 27	**1 663.9**	**125.3**	**27.4**	**17.8**	**75.9**	**1 910.3**
EU - 28	**1 703.4**	**139.0**	**28.4**	**18.1**	**76.2**	**1 965.1**

Pig Farms divided in herd size categories

2016

8032100
00

Member State	livestock from ... to .. pigs					
	1 to 9	10 to 49	50 to 99	100 to 199	200 and more	Total
BE	0.9	3.0	5.0	32.6	6 137.5	6 179.0
BG	48.2	13.9	3.9	5.5	566.9	638.4
CZ	6.7	16.4	11.7	14.5	1 493.0	1 542.2
DK	1.2	3.8	2.6	7.8	12 367.7	12 383.0
DE	**32.6**	**110.4**	**165.7**	**331.1**	**28 013.1**	**28 653.0**
EE	0.2	0.6	0.5	0.9	277.8	279.9
IE	2.9	0.9	0.5	1.4	1 598.1	1 603.9
GR	32.3	33.7	23.4	21.4	658.3	769.1
ES	62.7	103.8	124.3	253.1	23 402.6	23 946.5
FR	13.0	38.5	52.6	113.7	13 381.4	13 599.2
HR	155.4	267.8	69.9	40.7	411.2	944.9
IT	50.5	108.7	64.7	64.8	8 086.9	8 375.5
CY	1.0	0.8	0.2	.	263.1	265.1
LV	26.6	15.1	4.1	3.8	311.5	361.1
LT	89.8	10.9	2.3	1.5	522.9	627.3
LU	0.1	0.3	0.4	0.3	91.2	92.3
HU	270.7	164.8	51.4	47.3	2 444.6	2 978.8
MT	0.0	0.[illegible]	0.8	3.6	37.0	41.6
NL	0.6	2.7	6.8	32.0	12 436.5	12 478.6
AT	42.0	53.4	64.3	167.0	2 557.1	2 883.9
PL	285.1	1 583.4	1 181.2	1 194.4	6 738.8	10 982.8
PT	70.[illegible]	46.4	32.5	39.3	1 686.9	1 875.1
RO	2 044.2	213.5	13.6	3.9	1 867.7	4 142.8
SI	57.5	44.8	20.3	27.9	123.0	273.4
SK	14.5	10.8	5.1	5.0	448.6	484.0
FI	0.1	0.9	2.8	20.5	1 210.6	1 234.9
SE	1.2	2.8	3.3	6.1	1 340.9	1 354.3
UK	12.5	50.3	45.9	74.7	4 361.3	4 544.8
EU - 27	**3 166.8**	**2 634.9**	**1 889.9**	**2 473.9**	**132 424.8**	**142 590.4**
EU - 28	**3 322.2**	**2 902.7**	**1 959.8**	**2 514.6**	**132 836.0**	**143 535.3**

Q u e l l e: EUROSTAT (Stand: September 2020), BLE (414).

https://www.bmel-statistik.de/landwirtschaft/tierhaltung/schweinehaltung

EU - 2016 pig production

All pigs (EU 27, minus Romania) 2016

	Under 200 heads	Over 200heads	Total
Farms	550920	75740	626660
Percentage of total	87.91%	12.09%	
Pigs in heads	7890470	130557140	138447610
Percentage of total	5.70%	94.30%	

Fattening pigs (EU 27, minus Romania) 2016

	Under 200 heads	Over 200heads	Total
Farms	475050	71270	546320
Percentage of total	86.95%	13.05%	
Pigs heads	5127770	78382490	83510260
Percentage of total	6.14%	93.86%	

Organic production related to farm size?

German organic production 2016

Farms with organic pig production - divided in size (number of heads/ farm)

(MBT-0117445-0000)

Herd size from...to... Pigs	Number	Percentage - of herd size categories in %	Number	Percentage of herd size categories in %
	2016		2020	
		pig farms		
1 - 49	1 105	*72.8*	1 107	*70.7*
50 - 99	116	*7.6*	121	*7.7*
100 - 399	178	*11.7*	195	*12.5*
400 - 999	74	*4.9*	95	*6.1*
1000 - 1999	30	*2.0*	34	*2.2*
2000 and more	14	*0.9*	14	*0.9*
Total	**1 517**	***100.0***	**1 566**	***100.0***
		Number of Pigs in 1 000		
1 - 49	11.1	*5.7*	11.2	*5.3*
50 - 99	8.1	*4.1*	8.4	*4.0*
100 - 399	37.8	*19.2*	42.4	*19.9*
400 - 999	43.2	*22.0*	57.8	*27.2*
1000 - 1999	39.4	*20.1*	45.6	*21.5*
2000 and more	56.6	*28.9*	47.0	*22.1*
Total	**196.1**	***100.0***	**212.5**	***100.0***
		Number of pigs per farm		
Total	**129.3**	-	**135.7**	-

Anm.: Daten aus der Agrarstrukturerhebung 2016 und der Landwirtschaftszählung 2020 des Statistischen Bundesamtes. Ausschließlich in die ökologische Wirtschaftsweise einbezogene Viehbestände. Stichtag 1. März.

Statistisches Bundesamt: FS 3, Reihe 2.2.1

Organic in Pig Meat Sector

- The organic pig farming sector represents less than 1 % of all pig farming in the EU. Austria and Denmark have higher levels of organic pig farming (3 %), as does Sweden (2 %)

- Organic pig and poultry production shows higher annual growth rates (respectively 6 % and 10 %)

- Unlike conventional ones, organic pig production systems must include access to a free-range area

Briefing on pig meat sector, European Parliament, 2020

Definition Short Supply Chains

"Supply chains involving a limited number of economic operators, committed to cooperation, local economic development, and close geographical and social relations between food producers, processors and consumers."

The EU's rural development regulation (1305/2013)

Short supply chains

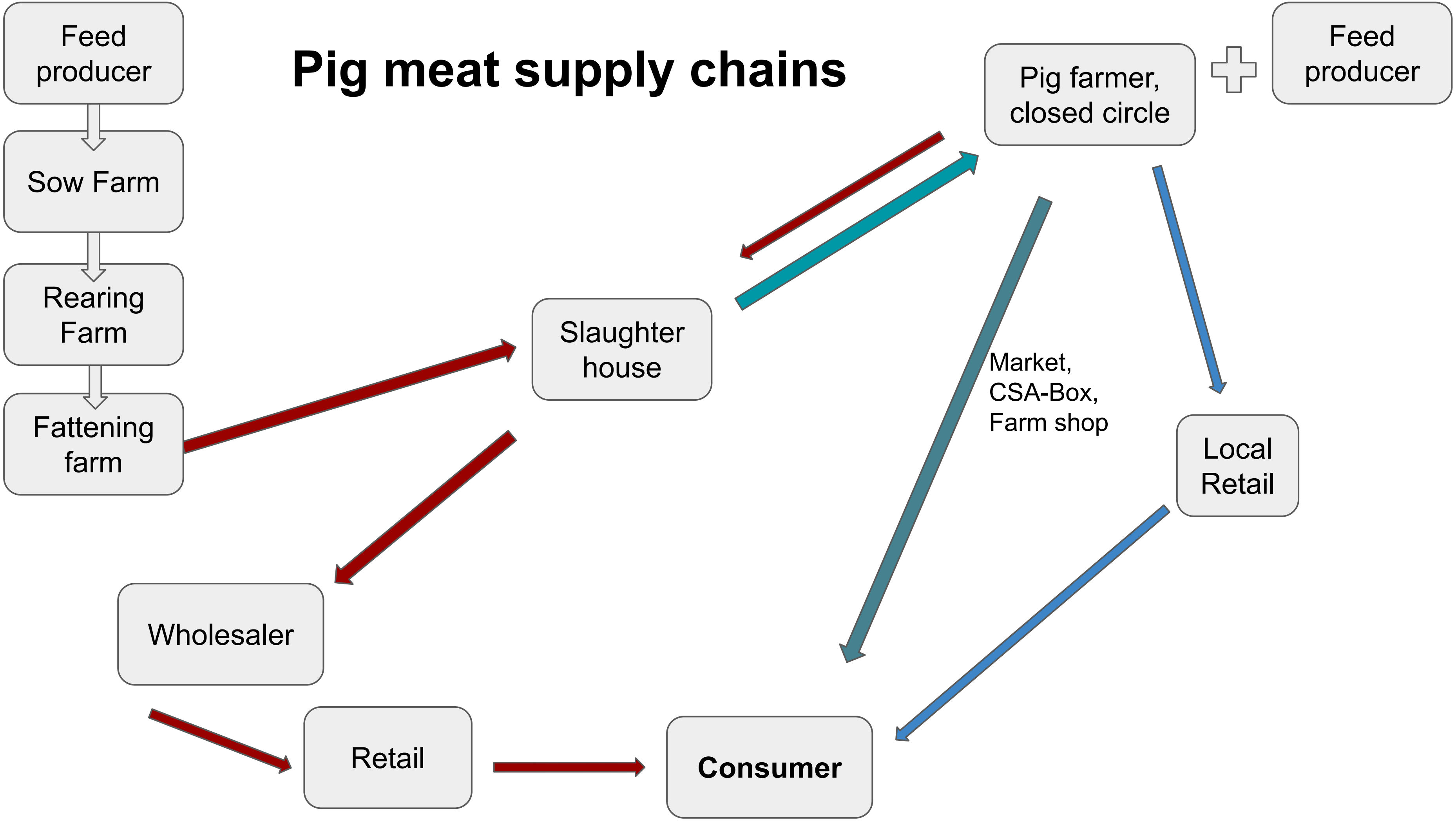
- Geographical proximity: product distance from farm to fork: supply for local territory

- Social proximity: social closeness and mutual trust

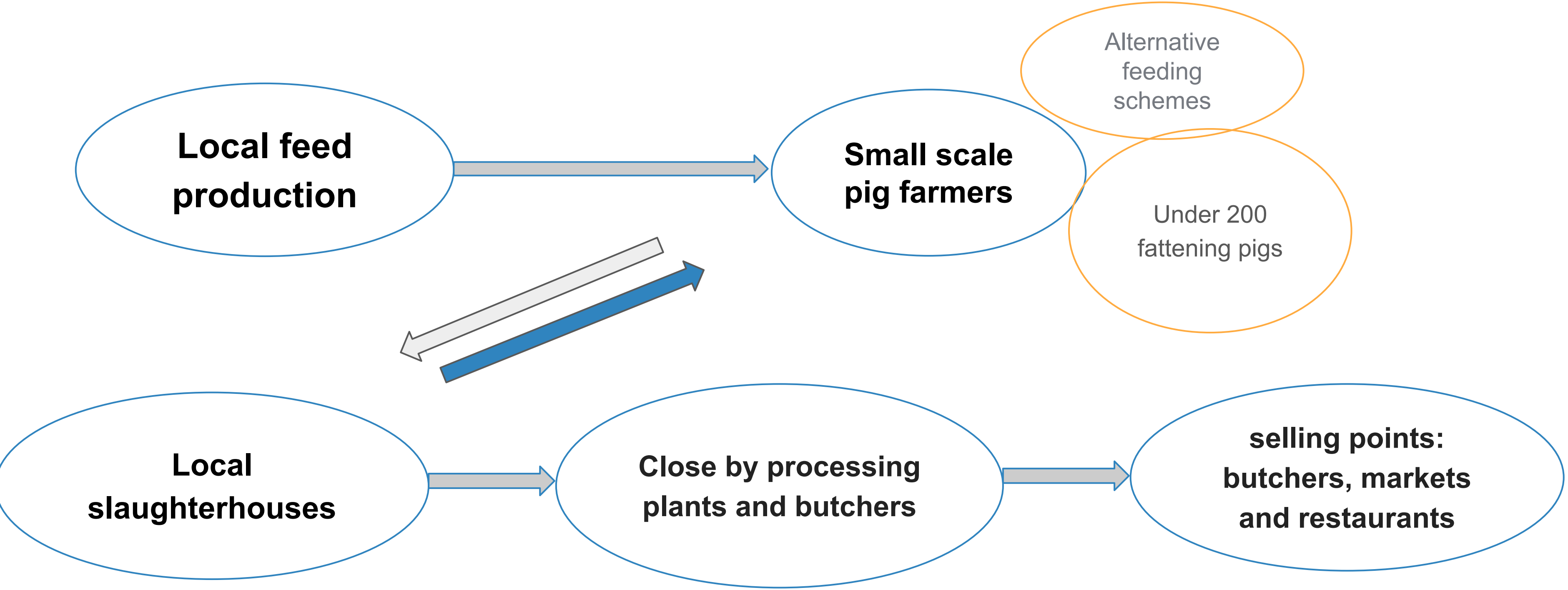
- Organizational proximity - max. intermediary

Malak-Rawlikoska et al. 2019

Pig meat supply chains



Pig meat producers and local retailers linked to their territory…. Geographical aspect



Short supply chain - often even shorter

In many cases short supply chain - segments are managed by one person:

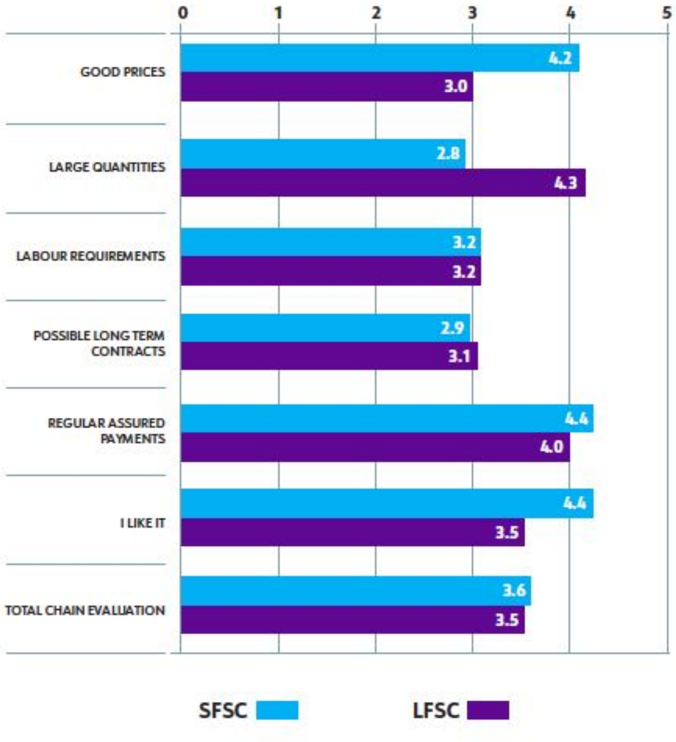
- Pig farmers produce their own feed
- Pig farmers who let slaughter but process and sell the meat on their own
- Produce is given extra valorization through direct sale

Pig meat market - distribution

- Farmer’s markets
- Collective farmer’s shops
- Direct on Farm sale through farm shops
- Community supported agriculture
- Solidarity purchase groups
- Use in “agriturismo” - farm owned restaurant

Producers acceptance of short or long supply chains

Figure 3. Chain evaluation based on producer perception:
'How attractive is this market chain?'*

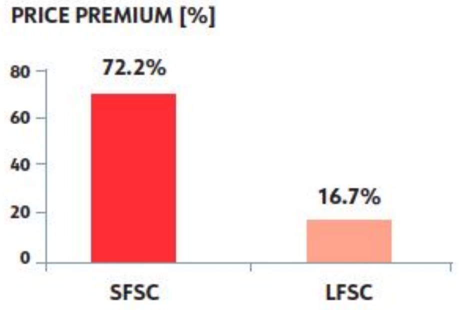


* LIKERT SCALE 0-5

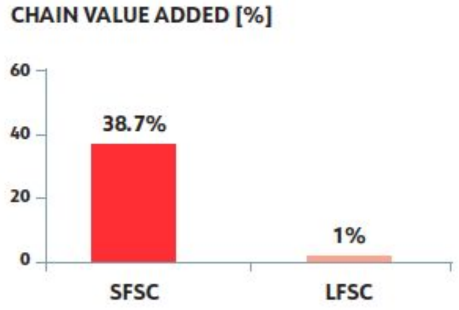
0 = Very weak/ poor
5 = Very good/ strong

Vttersø et al., 2021

Figure 2. Economic sustainability indicators for SFSCs and LFSCs



$$= \frac{\textit{Price difference (Farm gate price in chain-farm gate price to when selling retail) (euro/kg)}}{\textit{Average farm gate to retail price in the region (euro/kg))}}$$



$$= \frac{\textit{(Chain value added (euro/kg)}}{\textit{Average farm gate to retail price in the region (euro/kg))}}$$

Distribution costs contain: costs of transportation, packaging, market fees and similar payments, as well as distribution related labour input. Costs of own labour were estimated at per hour rates paid to hired labour.

Vitterskö et al. 2021

Table 4: Overview of types of LFS/SFSC in the EU	
SFSC	**Sub-classification**
Sales in proximity. These may be achieved by farmers acting individually or collectively, but produce has to be traceable back to a named farmer.	*CSA (Community Supported Agriculture) (or equivalent : AMAP, GAS, etc.)* - have variations according to different regions and countries, but follow same essential principles whereby subscribers receive a share of the harvest in return for money and labour. On Farm Sales: - Farm shops - Farm based hospitality (e.g. table d'hôte, B&B) - Roadside sales - Pick-Your-Own
	Off Farm Sales – commercial sector: - Farmers' markets and other markets - Farmer owned retail outlet - Food Festivals / tourism events - Sales directly to consumer co-operatives / buying groups - Sales to retailers who source from local farmers and who make clear the identity of the farmers. - Sales to HoCaRe* as long as the identity of the farmer is made clear to end consumers.
	Off Farm Sales – catering sector: - Sales to hospitals, schools etc. The catering sector institution in this case is understood as the 'consumer.'
	Farm Direct Deliveries: - Delivery schemes (e.g. veg box)
Sales at a distance These may be achieved by farmers acting individually or collectively, but produce has to be traceable back to a named farmer.	Farm Direct Deliveries: - Delivery schemes - Internet sales - Speciality retailers

Kneafsey et al., 2013

Distribution methods vary by country

Northern Europe was generally open to modern distribution systems.

Whereas Southern Europe prevails on farm-purchase and markets.

Kneafsey et al. 2013

Services of farmers with short supply chains to society

- Provide **access to fresh local produce** in respective local areas
- Small scale productions **support local food networks** and **enhance food security**
- **Creating work** (more workers and communities supported per kg of meat produced)
- Short supply chains: limited number of participants along the chain => more **information transfer** to consumers

Advantages for Animal Welfare & Environment

- Short chain productions means often direct traceability of product and animal
- Small scale / organic producers with direct contact to consumers have higher welfare standards in the stables (community control)
- Smaller holdings with less density mean less stress

Resilience in an unstable sector

“Are there particular economic models that ensure resilience?”

- Monetary valorization products => selling through long supply chains or retailers would be too low
- Diversification of distribution channels creates more resilience of the production in cases of crisis
- Collective farmer’s shops, Farm shops, Community supported agriculture, Solidarity purchase groups

What is the added value of pig farming for rural areas? Are there threats to be mitigated?

- Depopulation of pig sector, supplier chains and of rural inhabitants: free range rearing is happening in remote zones of europe

- These zones benefit from the landscape maintenance, create tourism, support the local economy and keep marginal and rural areas alive (often flourishing without life-support from the institutions)

- They contribute to the resilience for local economies

Resilience and Crises

Benefits during COVID:

- Local food network systems continued even with disruptions, as they are NETWORKS and not CHAINS
- More smaller slaughterhouses kept open during crises, as less staff did not have to quarantine => less people less risk

Resilience and Crises

Benefits during raw material shortages and price volatility:

- Elasticity in price and payment between connected farmers through mutual trust

- Community works as buffer => consumers are willing to pay more or wait for their goods, if they know why.

- Small scale pig farmers have less difficulty to purchase variety of feed in small amounts.

Difficulties for farmers with short supply chains

Small scale farmers have difficulties:

- Age: **average age** of pig farmers rising and communication with young consumers become difficult.
- **Biosecurity requirements** for outdoor farms not feasible
- **Few own resources** for investments in food production (in terms of hygiene, labeling, etc)

More difficulties for farmers with short supply chains

- Socio-economic impacts of **depopulation** of rural areas (as i.e. the italian Apennine region)

- Distance from farm to **slaughterhouse**: local small scale slaughterhouses (recent development of numbers)

- Impact and threads of spreading **african swine fever**

Small Scale production and Crisis

→ Economic resilience for small scale producers quite good, as many have several tiny production sectors

Pigs health crisis: AFRICAN SWINE FEVER

Piemonte and Liguria:

- Enhanced biosecurity measures are not feasible for small scale producers
- Farmers were unprepared and had to close productions (reimbursement on market value (1.33€/kg live weight) is not even half of production costs in semi-outdoor / organic productions (3.00€ - 4.00€/kg live weight)

Difficulties for small scale Farmers in subsidies and innovation

- Difficulties to access subsidies due to lack of knowledge, time and bureaucratic hurdles in member states

- Purchase of used agricultural machinery not permitted in financial schemes

- Subsidies do not finance self construction (fencing systems etc)

Price mechanism of local produce

Most farmers look at the prices that other retailers present

- The « law of market » also applies in local markets : it’s not possible to fix prices based on production cost, because if you are much more expensive than competitors, it will be hard to sell your production
- Mechanism of « niche » for local, organic and fresh products that allow a price still higher that what supermarkets would pay for it
- Consumers often buy less but more expensive => way to the future

To which extent can structural measures help the pigmeat sector?

- Short food supply chains do allow fairer price than long supply chains dominated by big agr-business

- It should not be presented as a magical solution, because also in short supply chains too, prices are being imposed to farmers in the "free-market" law

- So short supply chains should be supported, but together with strong market and price regulation to make sure that agricultural prices are above production costs and allow a decent living for farmers

Spain

“Between 1999 and 2013 only, the number of pig farms decreased by more than two thirds (128 000 farms disappeared) while the number of pigs per farm quadrupled.”

Briefing on pig meat sector, European Parliament, 2020

Small scale traditional pig farming still exists in spain in dehesas: traditional cultural landscapes and agro-sylvo-pastural system. Where feeding is special: roots, gras, mushrooms and acorns.

Pig Farming in Italy

Numbers of farms have declined since decades…

0.4362

DENSITÀ ALLEVAMENTI (N. ALLEV. PER KMQ)

29.1374

DENSITÀ CAPI (N. CAPI. PER KMQ)

Dati elaborati il **17/01/2022**

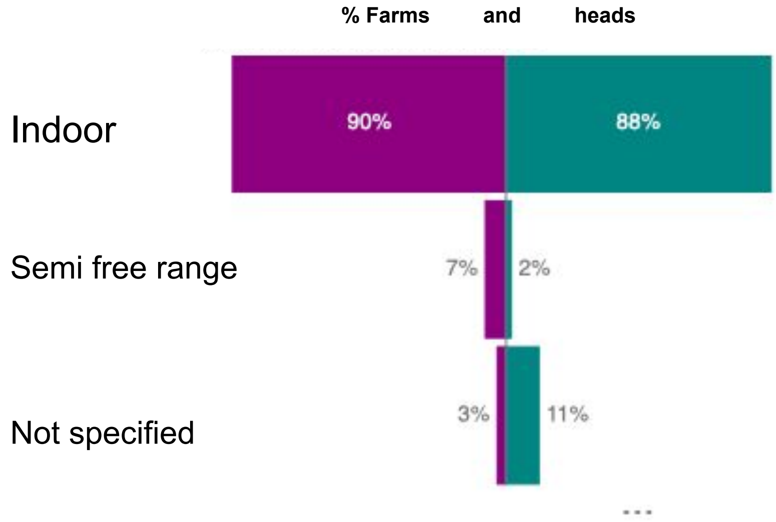
NUMERO AZIENDE per REGIONE

DENSITÀ ALLEVAMENTI PER KMQ

DENSITÀ CAPI PER KMQ

Anagrafe Nazionale Zootecnica, Italy accessed 23/03/2022

Italy - Types of farming system



Anagrafe Nazionale Zootecnica, Italy accessed 23/03/2022

- Statistics not representative, as many local veterinarian systems do not categorize correctly

- During ASF in Piemonte: infact outdoor rearing farms have been seen categorized as closed industrial systems.

France

- The number of monogastric farms (pigs + poultry) **has decreased by 35% between 2010 and 2020 in France,** while French pig production was stable

- 98% of the production is done in buildings without outdoor access

- According to Inaporc, only 2.7% of sows are reared free range and 1.6% of pigs are fattened there

- Free range systems are very dependent on short supply chains

- Number of slaughterhouses for slaughter animals (= ruminants + pigs): 286 in 2010, 250 in 2019

France

- On 1 February (before the Ukrainian crisis), the government announced a package of three aid measures worth €270 million for pig farming, to deal with a major crisis (fall in the price of pork and rise in feed costs):

- Conféderation paysanne has not received any invitation to a meeting, nor any information from the Ministry on this aid plan. It seems that this aid is intended exclusively for industrial livestock farming, and our members do not fit into these criteria.

African swine fever: due to the threat of African swine fever, the French government is imposing drastic biosecurity measures on free-range livestock farms, causing major economic problems. However, free-range farms receive much less support than other farms.

References

Anagrafe Nazionale Zootecnica Italiana, https://www.vetinfo.it/j6_statistiche/#/report-pbi/31 Italy accessed 23/03/2022

Bundesministerium für Ernährung und Landwirtschaft https://www.bmel-statistik.de/landwirtschaft/tierhaltung/schweinehaltung, (Quelle: Eurostat, accessed September 2020)
Accessed on 03/04/2022

European Parliament, Briefing on pig meat sector, European Parliament, 2020 accessed 03/04/2022

Kneafsey M, Venn L, Schmutz U, Balasz B, Trenchard L, Eyden-Wood T, Bos E, Sutton G, Blackett M, authors Santini F, Gomez Y Paloma S, editors. Short Food Supply Chains and Local Food Systems in the EU. A State of Play of their Socio-Economic Characteristics.. EUR 25911. Luxembourg (Luxembourg): Publications Office of the European Union; 2013. JRC80420

Malak-Rawlikowska, A., Majewski, E., Wąs, A., Borgen, S. O., Csillag, P., Donati, M., Freeman, R., Hoàng, V., Lecoeur, J.-L., Mancini, M. C., Nguyen, A., Saïdi, M., Tocco, B., Török, Á., Veneziani, M., Vittersø, G., & Wavresky, P. (2019). Measuring the Economic, Environmental, and Social Sustainability of Short Food Supply Chains. *Sustainability, 11*(15), 4004. https://doi.org/10.3390/su11154004.

Regulation (EU) No 1305/2013 of the European Parliament and of the Council of 17 December 2013 on support for rural development by the European Agricultural Fund for Rural Development (EAFRD) and repealing Council Regulation (EC) No 1698/2005

Strength2Food, Vittersø, Borgen, Majewski, Malak-Rawlikowska, Tocco, 2021
https://www.strength2food.eu/wp-content/uploads/2021/04/Strategic-Guide-Short-Food-Supply-Chains.pdf accessed on 03/04/202

Thank you for your attention

Contact and information:
info@eurovia.org
www.eurovia.org