The Full Value Pigs® global survey is designed to give pork producers a broader context within which to assess their swine operation. The survey’s findings on animal health, feed optimization and marketing strategies can help pork producers:

- Assess disease threats, including ileitis and swine respiratory disease
- Understand feed management and its related costs
- Compare global practices and results

The multiple-choice survey involved nearly 500 veterinarians, pork producers, nutritionists and other industry influencers. Collectively, the survey respondents are responsible for producing more than 46 million pigs per year.

Each survey entry was validated and transferred by a third party. The survey was conducted in 32 countries encompassing four regions: U.S./Canada; Europe; Asia/Pacific Rim; and Latin America.

These results provide a barometer for producers to see how they compare to others in key areas of pork production. In addition, the results provide valuable knowledge that can help producers increase their percentage of Full Value Pigs. Follow-up surveys will be conducted at regular intervals.

Full Value Pigs refers to a profitability-focused business model that assesses pig populations plus facility and market constraints to determine the optimum performance for a specific swine operation. The survey results have been organized around Full Value Pigs and its four key areas:

- Disease management (taking a holistic approach to disease management and herd health)
- Feed optimization (getting the most out of producers’ biggest input)
- Precision harvest (delivering the right weight at the right time)
- Assurance & access (assurance that producers will be able to provide quality pork to the desired market)
Disease management key points

- More than half of all respondents cite *Mycoplasma hyopneumoniae* as a health challenge.
- PRRS incidence is high in all regions, except Latin America.
- Ileitis is consistent in all regions regardless of production style or location.
- Europe tends to have more issues with PRRS, *Streptococcus suis* and *E. coli*; Latin America has more issues with *Mycoplasma hyopneumoniae*.
- Despite limited availability of labs in some areas, respondents prefer scientific and professional diagnoses.

Health challenges: global summary

**Q:** In the past year, which of the following health challenges have your pigs encountered?

- *Mycoplasma hyopneumoniae*: 55.40%
- PRRS: 49.80%
- *Streptococcus suis*: 45.60%
- *E. coli*: 45.40%
- Ileitis/proliferative enteropathy: 42.70%
- *Haemophilus parasuis*: 35.40%
- Swine influenza virus: 35.20%
- PCV2AD: 32.30%
- *Actinobacillus pleuropneumoniae*: 25.00%
- Gastric ulcers: 20.60%
- *Pasteurella multocida*: 18.80%
- Worms/parasites: 15.40%
- Swine dysentery: 12.70%

The most widely reported health challenge (55.40%) was *Mycoplasma hyopneumoniae*.

Diagnosing disease

**Q:** What is your preferred method for diagnosing disease in your herd?

- Veterinary consultation: 35.2%
- Laboratory submissions: 31.9%
- Clinical observation: 27.2%
- On-site necropsy: 21.1%
- Performance records: 9.8%
- Slaughterhouse examinations: 4.1%
- Handheld test kit: 0.6%

Overall, respondents preferred to diagnose disease through veterinary consultation, laboratory submissions and clinical observation.
Health challenges: regional

Mycoplasma hyopneumoniae

Overall, survey respondents reported that they saw Mycoplasma hyopneumoniae more than any other disease. However, disease prevalence does change when viewed by region.

Porcine reproductive and respiratory syndrome

The incidence of PRRS was highest in Europe, where it was reported more than three times as often as it was in Latin America.

Streptococcus suis

Streptococcus suis was most prevalent in Europe. No health challenge recorded a higher prevalence in any region.

E. coli

Europe also reported the highest incidences of challenges from E. coli.

Ileitis/proliferative enteropathy

About 40% to 50% of all pork producers reported challenges from ileitis/proliferative enteropathy—very consistent, common response.

Haemophilus parasuis

Haemophilus parasuis was most prevalent in Asia/Pacific Rim.
Ileitis/swine respiratory disease

Q: In the past year at your operation/practice, has ileitis:

- **Global**
  - Become more serious: 9%
  - Become less serious: 30.7%
  - Remained about same: 60.2%

- **U.S./Canada**
  - Become more serious: 7.8%
  - Become less serious: 62.5%
  - Remained about same: 30.7%

- **Europe**
  - Become more serious: 2.8%
  - Become less serious: 64.3%
  - Remained about same: 31%

- **Latin America**
  - Become more serious: 10.5%
  - Become less serious: 56.8%
  - Remained about same: 32.7%

- **Asia/Pacific Rim**
  - Become more serious: 12.9%
  - Become less serious: 53.2%
  - Remained about same: 33.9%

Only about 31% of all respondents said ileitis had become less serious in the past year.

Q: In the past year at your operation/practice, has swine respiratory disease:

- **Global**
  - Become more serious: 21.1%
  - Become less serious: 51.7%
  - Remained about same: 27.2%

- **U.S./Canada**
  - Become more serious: 15.9%
  - Become less serious: 61.9%
  - Remained about same: 22.2%

- **Europe**
  - Become more serious: 18.2%
  - Become less serious: 43.2%
  - Remained about same: 38.6%

- **Latin America**
  - Become more serious: 27.8%
  - Become less serious: 39.2%
  - Remained about same: 33%

- **Asia/Pacific Rim**
  - Become more serious: 36.5%
  - Become less serious: 30.2%
  - Remained about same: 33.3%

More than seven in 10 respondents said swine respiratory disease remained the same or became more serious in the past year.
Feed optimization key points

- For most producers, feed is the single largest cost associated with raising a pig
- Producers cite improved animal health as having the most positive effect on feed optimization
- Most producers expect feed costs to increase at a higher rate than inflation

Feed costs: global summary

Q: In your experience, feed represents about what percentage of the total cost of raising a pig?

More than two-thirds of all respondents (68.4%) said feed represents 61% to 80% of the total cost of raising a pig.

Q: In the past year, what has had the most positive impact on your ability to optimize feed?

Nearly half (47%) of all respondents cited improved animal health as having the most positive effect on feed optimization.
Precision harvest key points

- A majority of producers worldwide report that 6% or more of the last pigs in their group are below target weight
- U.S./Canada tends to market pigs at higher weights and fewer days
- Asia/Pacific Rim tends to market pigs at lighter weights with relatively more days required to reach target weight

Target weights: regional

Q: What is your target market weight?

In most regions, the majority of producers target 101 to 120 kg (222 to 264 lbs.). But in the U.S./Canada, the majority target 121 to 140 kg (266 to 308 lbs.).
Q: On average, how many days does it take your pigs to reach your target market weight?

<table>
<thead>
<tr>
<th>Region</th>
<th>120 days or fewer</th>
<th>131 to 140 days</th>
<th>151 to 160 days</th>
<th>More than 160 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S./Canada</td>
<td>18.6%</td>
<td>78%</td>
<td>5.6%</td>
<td>19%</td>
</tr>
<tr>
<td>Europe</td>
<td>25.6%</td>
<td>9.3%</td>
<td>7%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Asia/Pacific Rim</td>
<td>14.3%</td>
<td>12.7%</td>
<td>19%</td>
<td>50.8%</td>
</tr>
<tr>
<td>Latin America</td>
<td>6.8%</td>
<td>17.5%</td>
<td>47.6%</td>
<td>27.2%</td>
</tr>
<tr>
<td>Global</td>
<td>14.4%</td>
<td>5.6%</td>
<td>16.6%</td>
<td>32.9%</td>
</tr>
</tbody>
</table>

More than half (51%) of all animals in the U.S./Canada region reached target weight by 150 days. In Asia/Pacific Rim, more than half of all animals required more than 160 days.

Q: When the last pigs in your group are sold, what percent are below target weight?

<table>
<thead>
<tr>
<th>Region</th>
<th>Fewer than 5%</th>
<th>6 to 10%</th>
<th>11 to 15%</th>
<th>16 to 20%</th>
<th>21 to 25%</th>
<th>26% or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>2.9%</td>
<td>3.7%</td>
<td>6%</td>
<td>13.8%</td>
<td>36.4%</td>
<td>37.2%</td>
</tr>
<tr>
<td>U.S./Canada</td>
<td>3.3%</td>
<td>8.8%</td>
<td>1.8%</td>
<td>6.8%</td>
<td>45.4%</td>
<td>38.5%</td>
</tr>
<tr>
<td>Europe</td>
<td>2.4%</td>
<td>4.8%</td>
<td>31%</td>
<td>33.3%</td>
<td>23.8%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Latin America</td>
<td>3.8%</td>
<td>18.3%</td>
<td>18.3%</td>
<td>14.4%</td>
<td>39.4%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Asia/Pacific Rim</td>
<td>3.2%</td>
<td>29%</td>
<td>32.3%</td>
<td>32.3%</td>
<td>19.4%</td>
<td>5.6%</td>
</tr>
</tbody>
</table>

Outside of the U.S./Canada region, more than one-third of all respondents said 11% or more of their pigs were below target weight when the last pigs in the group were sold.
Assurance and access key points

- When price is not a factor, producers most often consider “quality formulation/GMP” when choosing between a generic and branded product.
- Globally, about half of all producers raise some pork for export.
- Nearly three-fourths of U.S./Canada producers export pork, while fewer than one-fourth of producers in Asia/Pacific Rim and Latin America export pork.

Generic vs. branded: global summary

Q: Other than price, what is the main factor you consider when you decide between a generic and a branded product?

Respondents most often cited quality formulation/GMPs as the main factor in deciding between a generic vs. a branded product (when price is not a factor).

Exports: regional

Q: What percentage of your pigs are raised for meat export?

Latin America and Asia/Pacific Rim showed the lowest export totals, with fewer than 20% of respondents exporting pigs. In U.S./Canada, nearly three-fourths of all producers export pigs.
**Full Value Pigs key points**

- Over 80% of all respondents lose $11 or more for each pig that fails to reach full value.
- More than half of all producers say they track their number of Full Value Pigs (yet producers show little consensus on what the phrase means).
- More than half of producers say they average more than 80% of Full Value Pigs.
- Producers cite disease and variation most frequently as factors preventing more Full Value Pigs.
- Nearly half cite “reducing effects of disease” as the best way to increase their percentage of Full Value Pigs.

**Q: What is your definition of Full Value Pigs?**

<table>
<thead>
<tr>
<th>Definition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pigs receiving no discounts on marketing grid</td>
<td>41.7%</td>
</tr>
<tr>
<td>Pigs achieving ≥90% of maximum margin over feed cost</td>
<td>32.6%</td>
</tr>
<tr>
<td>Pigs with no sort loss</td>
<td>14.9%</td>
</tr>
<tr>
<td>Pigs shipped to primary packer</td>
<td>12.7%</td>
</tr>
</tbody>
</table>

Only one-third of respondents chose the correct definition of “Pigs achieving ≥90% maximum margin over feed cost.”

**Full Value Pigs tracking**

**Q: Do you keep track of the percentage of Full Value Pigs you produce?**

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latin America</td>
<td>30.4%</td>
<td>69.6%</td>
</tr>
<tr>
<td>Asia/Pacific Rim</td>
<td>43.5%</td>
<td>56.5%</td>
</tr>
<tr>
<td>Europe</td>
<td>60.5%</td>
<td>39.5%</td>
</tr>
<tr>
<td>U.S./Canada</td>
<td>66.5%</td>
<td>33.5%</td>
</tr>
<tr>
<td>Global</td>
<td>56%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Producers in the U.S./Canada were most likely to keep track of their percentage of Full Value Pigs, with about two-thirds doing so. Producers in Latin America were least likely to, at a rate less than one-third.
Q: What is your average percentage of Full Value Pigs per group?

More than half of all respondents said they average more than 80% of Full Value Pigs per group.

Full Value Pigs losses

Q: On average, how much money would you estimate you lose for each pig that fails to reach full value?

Over 80% of all respondents lose $11 or more for each pig that fails to reach full value.
Almost half of all respondents cited “reducing effects of disease” as the best way to increase their percentage of Full Value Pigs. And it was cited at least three times as often as the next closest choice (improve facilities or handling).
• Pork producers estimate significant losses from pigs falling short of full value. More than 80% of pork producers say they lose **$11 or more** for every pig that fails to reach full value.

• Feed represents the No. 1 cost of raising a pig. More than two out of three producers say feed accounts for **61% to 80% of the total cost** of raising a pig.

• Producers cite **improved animal health** as having the most positive effect on feed optimization, citing it almost 2½ times as often as any other factor.

• Producers overwhelmingly say **reducing the effects of disease** is the best way to increase their percentage of **Full Value Pigs**, preferring it more than 3:1 over any other tactic.

• A majority of producers worldwide report that **6% or more** of the last pigs in their group are below target weight. For one in four producers, at least 11% of their pigs are below target weight.

• More than half of all pork producers say they **track their percentage of Full Value Pigs**. However, there’s little consensus about the correct definition: Pigs achieving ≥90% maximum margin over feed cost.

• When price is not a factor, producers most often look to “**quality formulation/GMP**” for assurance.