



# Provenance & Profit: A Strategy for Scotland's Pig Industry

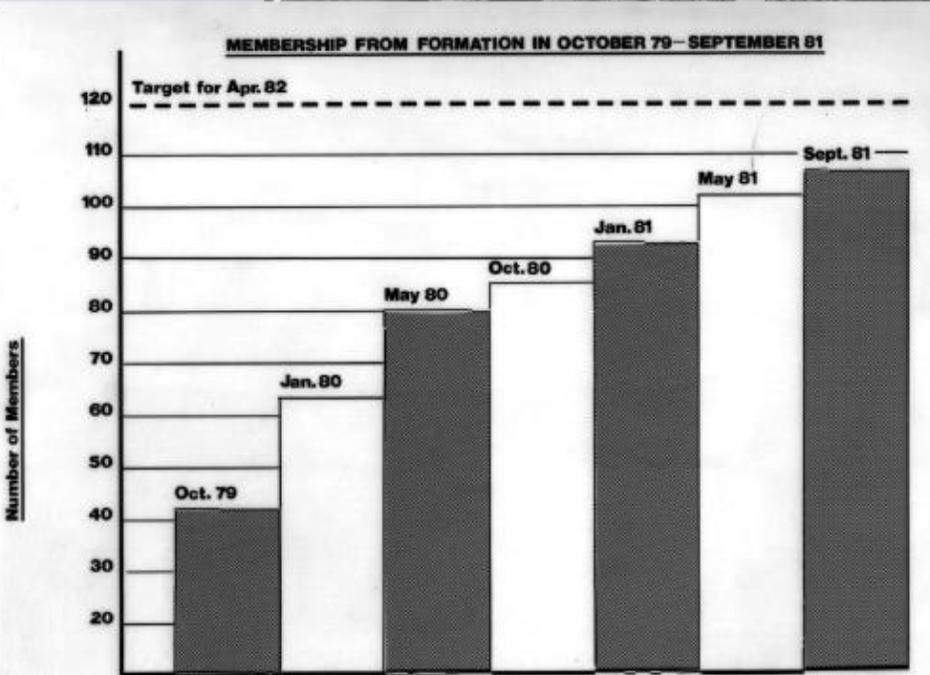
Andy McGowan

Scottish Pig Producers



# Scottish Pig Producers

# History



**GRAMPIAN PIGS GO FOR QUALITY**

SINCE ITS formation in late 1979, Grampian Pig Producers Limited, a pig procurement and marketing co-operative in the North East of Scotland, has made giant strides in its marketing activities.

This was the essential ingredient in achieving the long term aim of the co-operative, which was to substitute part of the importation of pig meats from Denmark, Eire, Holland and Poland by increasing volume sales of Scottish pig products in Scotland.

A television advertising campaign in the Grampian region on the theme of "Quality comes First" advertises the link-up between Halls of Bruchurn and Grampian Pig Producers. This is being supported by point of sale material throughout the full range of Halls' products.

Speaking at its first agm chairman Douglas Cargill of Collieston, Laurencekirk, illustrated the success of the co-operative by comparing achievements at the beginning and end of its first year of trading. These were:-

To achieve this aim Grampian Pig Producers has been working closely on a contractual basis with two well-known meat processing firms, William Donald of Perthshire and Halls of Bruchurn.

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This tie in between efficient farmers' co-ops and sophisticated companies must be seen to Scotland's advantage.

Margaret College for Economics for distribution of retail points in line with the recipes will be applied to Scottish cuts of meat.

Display involving Halls and Grampian Pig

# Scotland



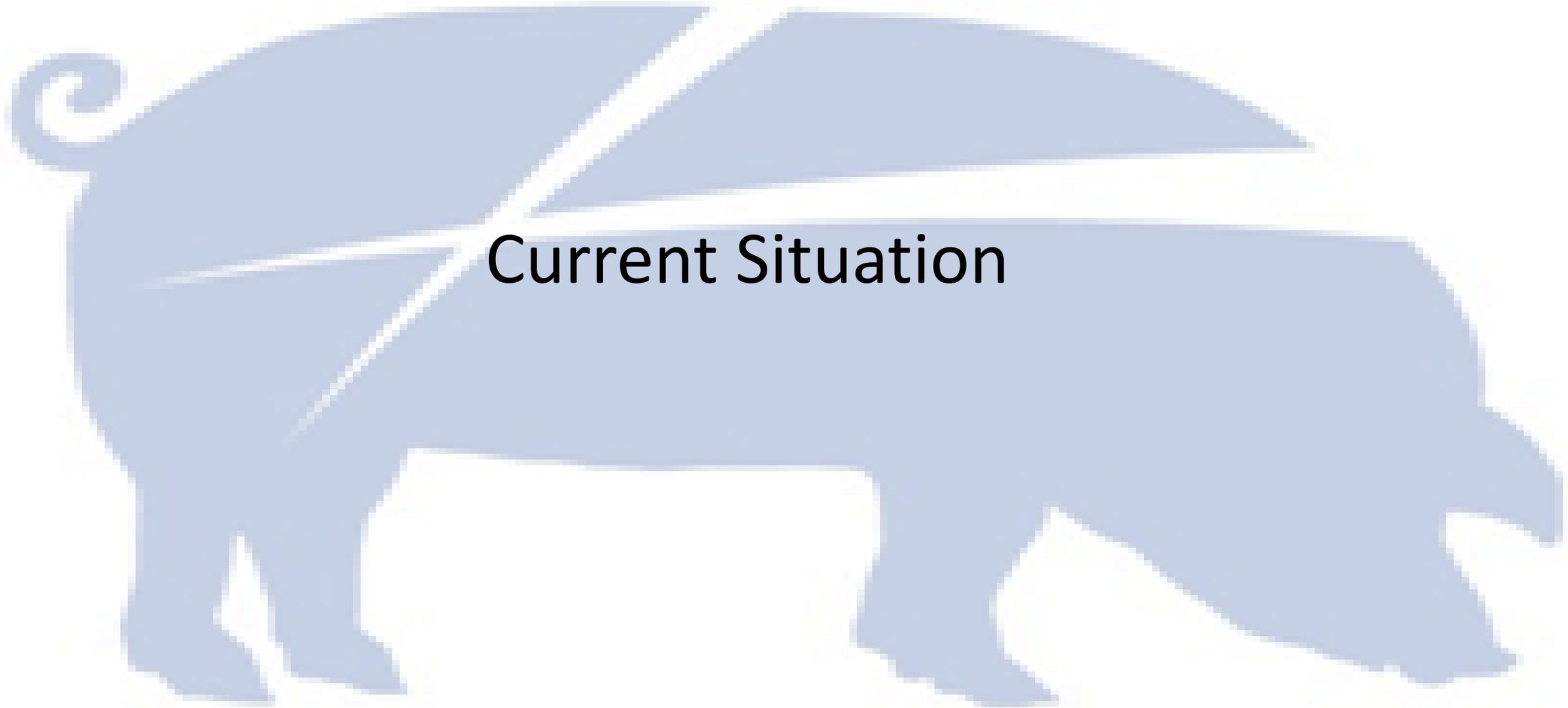
SCOTTISH PIG PRODUCERS LTD

*Quality comes first*



# Northern Ireland

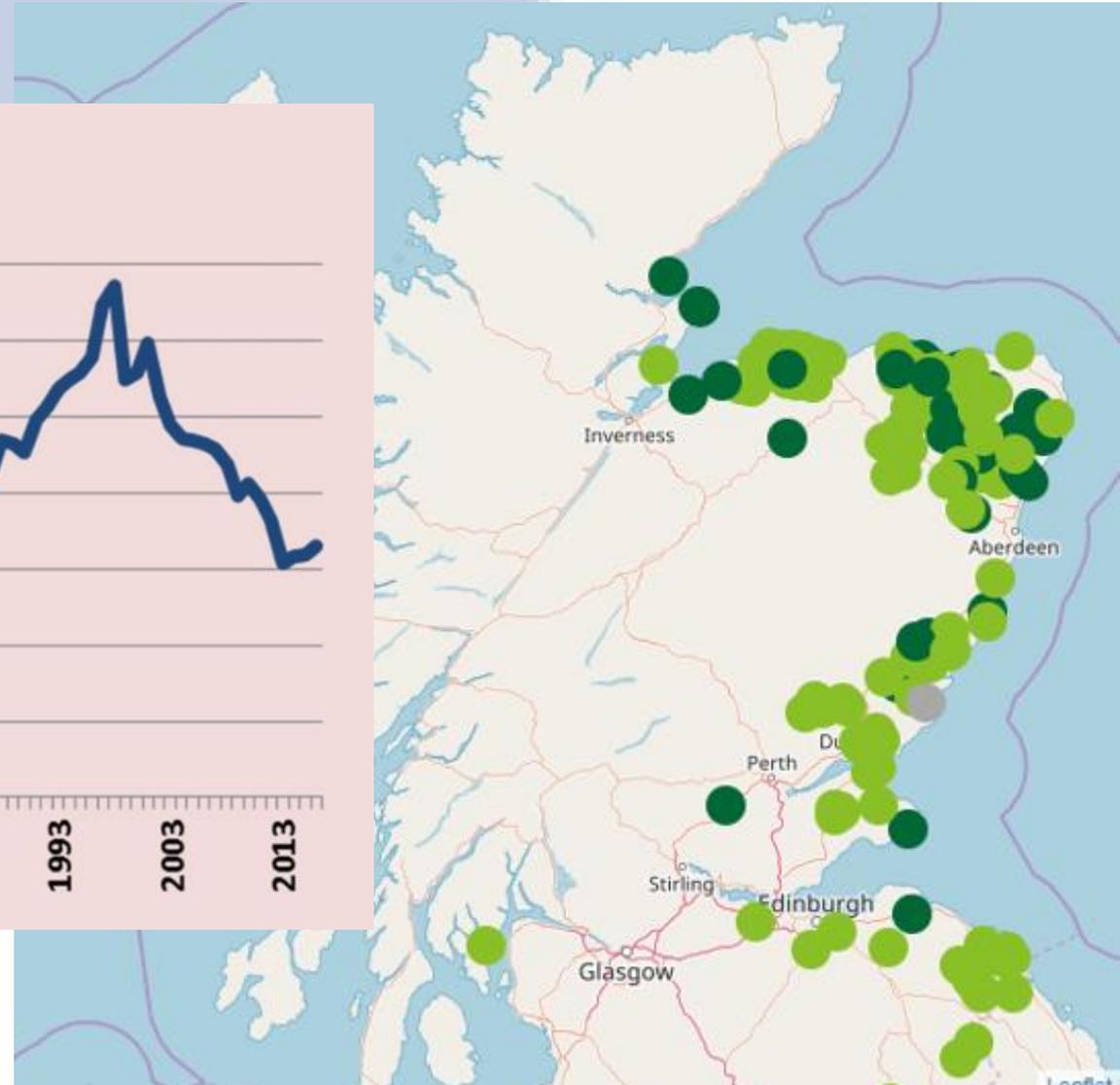
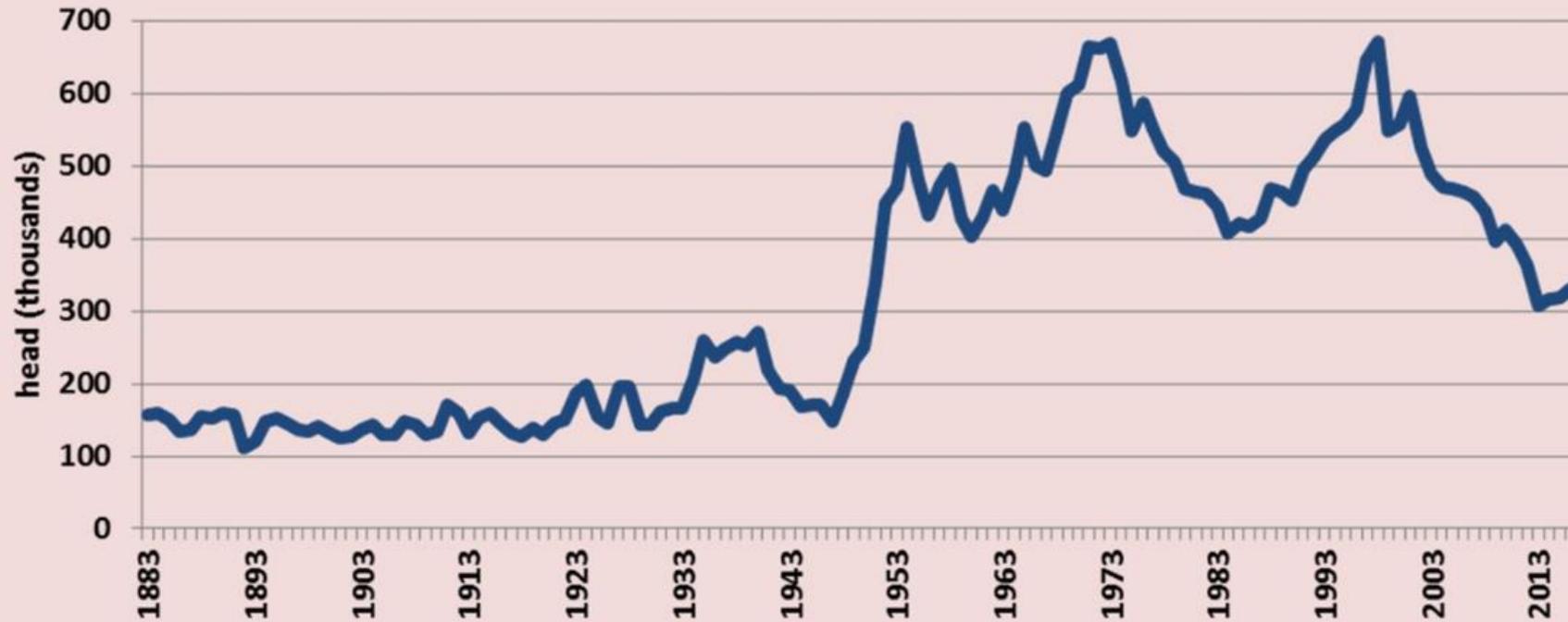




Current Situation

# Pigs in Scotland

Number of pigs (thousands)



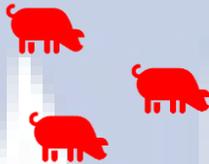
# Current Scottish Pig Flows



Karro: 400,000  
slaughtered in  
England



SPP/Scotlean/BQP:  
100,000 slaughtered  
in England



Weaners: 45,000  
slaughtered in  
England



SPP/Scotlean/BQP: 300,000  
slaughtered in Scotland

70%?

30%?



10,000t

# Scotland Food & Drink



To double the value of the food and drink industry in Scotland to £30bn

# Strategy Launched in June



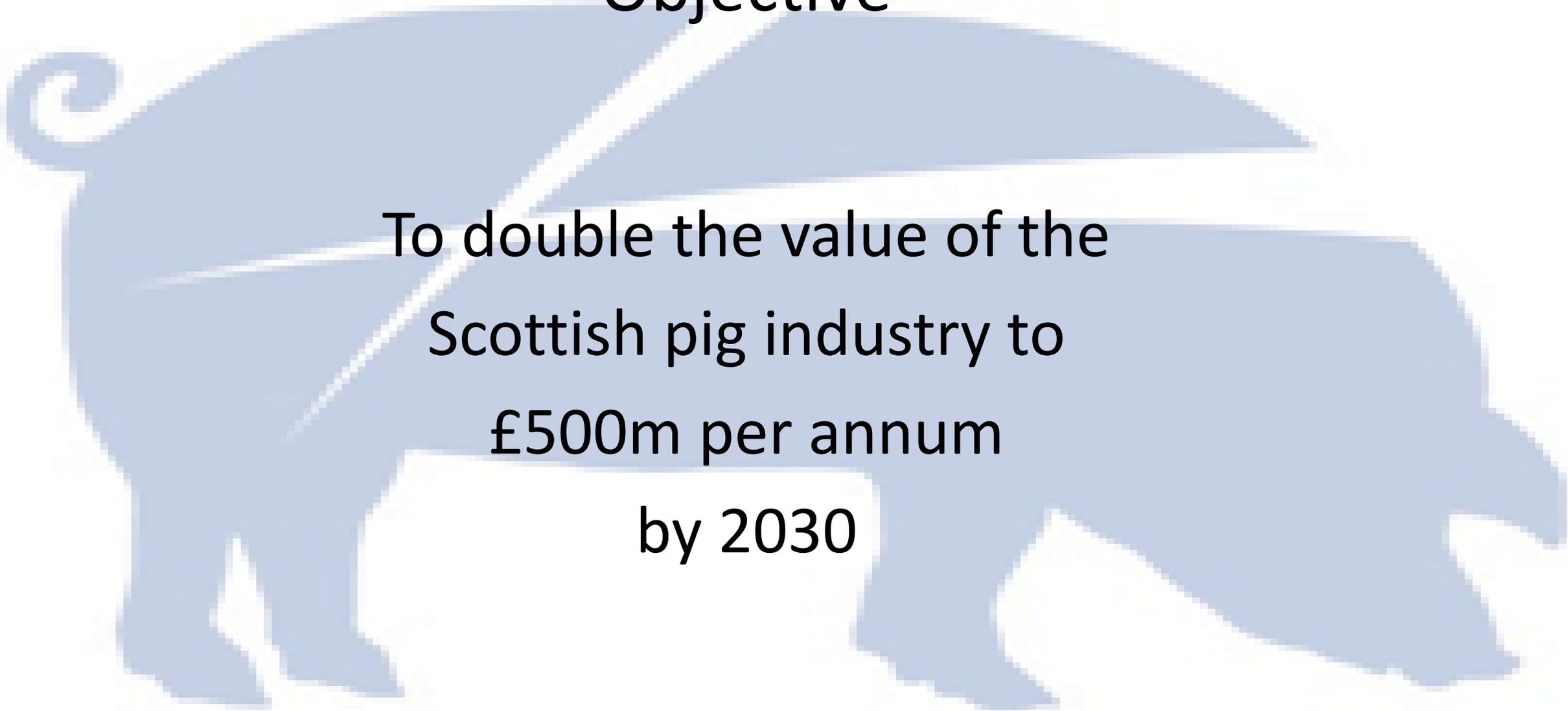
## Provenance and Profit



A strategy  
for Scotland's  
pig industry



Scotland  
A LAND OF  
food and drink



# Objective

To double the value of the  
Scottish pig industry to  
£500m per annum  
by 2030



**Building Integrated, Innovative, Sustainable  
and Profitable Supply Chains**

# 1. Form an Industry Leadership Group

- Independent Chair – Marion McCormick
- Health Group Chair – Grace Webster
- Marketing Group Chair – Philip Sleight
- Research Group Chair – Jos Houdijk
- Regulation Group Chair – Jamie Wyllie
- QPL Chair – Roderic Bruce
- Scotland Food & Drink – James Withers
- Quality Meat Scotland – Alan Clarke
- Scot Gov – John Davidson
- Public Sector Agencies – Nicola Watt
- Tulip rep – Andrew Saunders
- Brown Brothers – Wayne Godfrey
- Robertsons – Barry Robertson
- Scotlean – Richard Butterworth
- SPP – Patrick Stephen
- Karro – William De Klein
- Secretariat – Andy McGowan

## 2. Develop Collaborative and Efficient Supply Chains

### Contract kill discussions

- Woodheads
- Brown Brothers
- Robertsons

### Market Driven Supply Chain Reviews

- Robertsons
- Mill of Carden

### Scotland Food & Drink Supply Chain Board



# 3. Use R&D to Build Distinctiveness

## Projects Underway

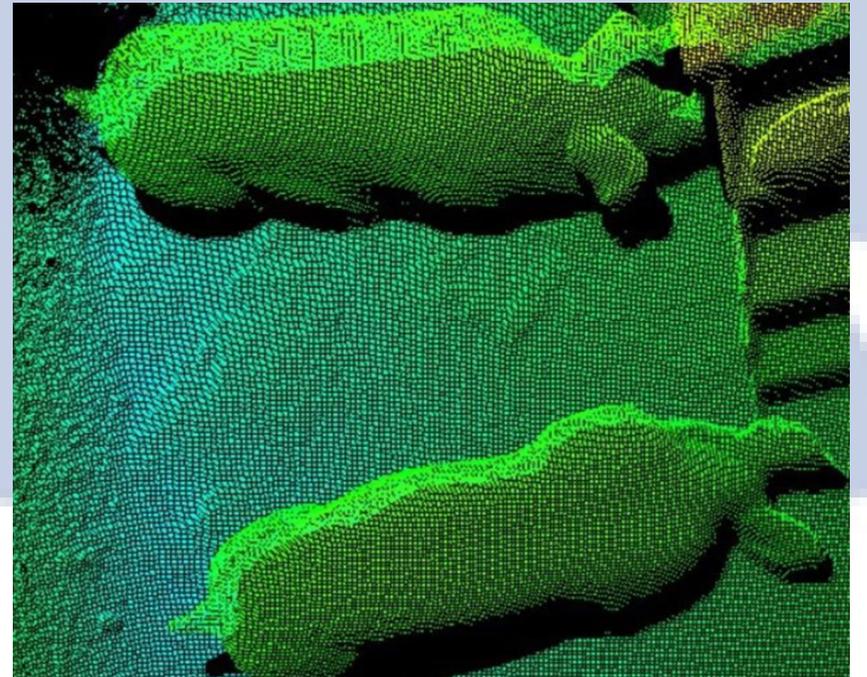
- Tailtech
- Carbon Trotterprints
- ZWS Feasibility Study for CO2 Capture from AD Plants

## Projects Planned

- Feedback of Boning Yield Info (NI)
- Innovative Tools for Measuring EQ
- Analysis of sensors and datasets

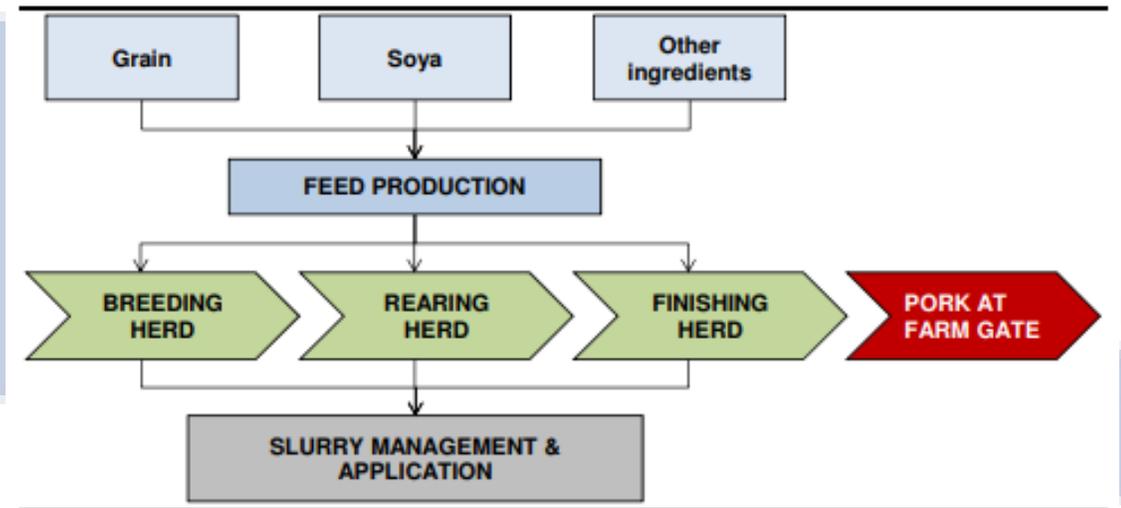
## Other Activity

- NFUS pigs WG visit to Roslin
- Pig R&D Committee



# Carbon Trotterprints

- Developing novel Tier II/III carbon footprinting methodology for application on Scottish pig sector
- Identifying low carbon and/or ammonia emitting feeds that can be practically used in Scotland
- WP(S), SRUC, Harbro, Norvite, ECV
- Julian Bell, Ilkka Leinonen, George Chalmers
- Funded by Interface



# 4. Ensure “Fit for Purpose” Regulation & Regulatory Compliance

## Underway

- Scottish Meat Industry Forum (FSS, Hallmark, Scot Gov)
- IPPC Liaison Group
- SAMW

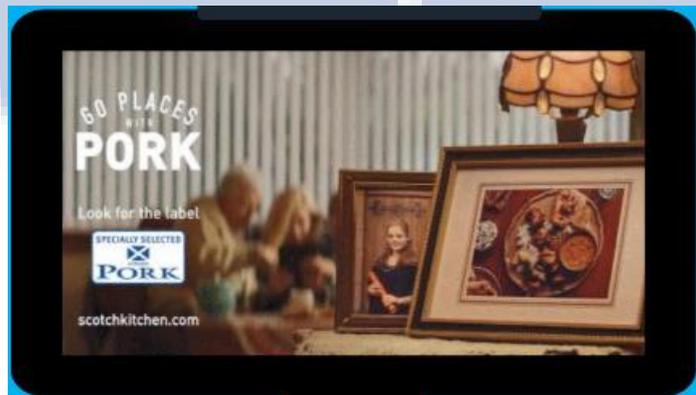
## To Do

- NFUS setting up Pig Regulation Group (SEPA, FSS, RPID, APHA, QMS, Scottish SPCA)

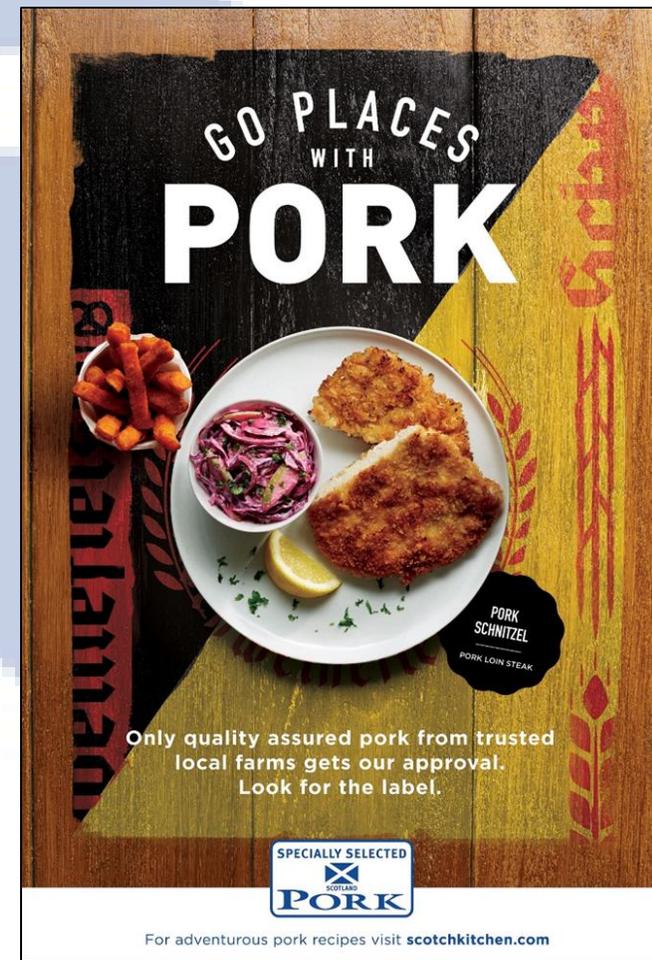
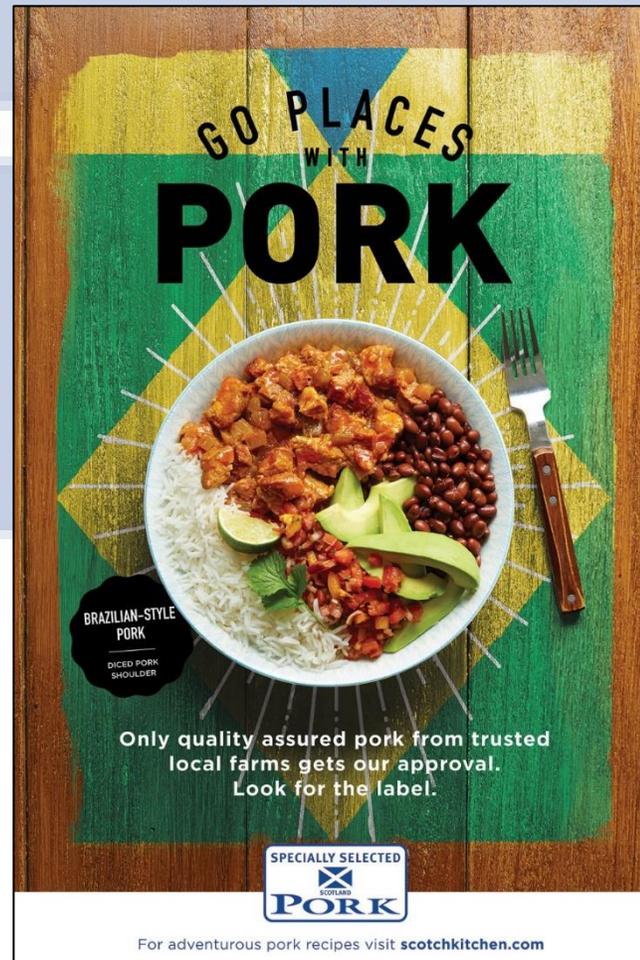


# Increasing the Demand For and Value of Specially Selected Pork

# 5. Review & Build Consumer-Relevant USP's for Specially Selected Pork



TV advert seen by  
**78%** of Scotland\*



# 6. Develop Understanding of Opportunities for Specially Selected Pork and Processed Products



# 7. Use Market Intelligence and Prompt Export Certification to Maximise Carcass Balance

- UK Export Certification Partnership
- China certification
- Ring-fenced fund joint (£1m/yr) activity – trade shows; outward & inward missions; market research
- QMS & AHDB Brexit impact assessments



# 8. Improve Product Consistency & Eating Quality

- Develop practical tools to measure quality at line speed
- Identify and share factors influencing quality with producers
- Main resource is Dr Rojas Bonzi, links with Agri-EPI & Neil Clelland
- Funded by KTIF
- Also undertaking the quality measurements for TailTech

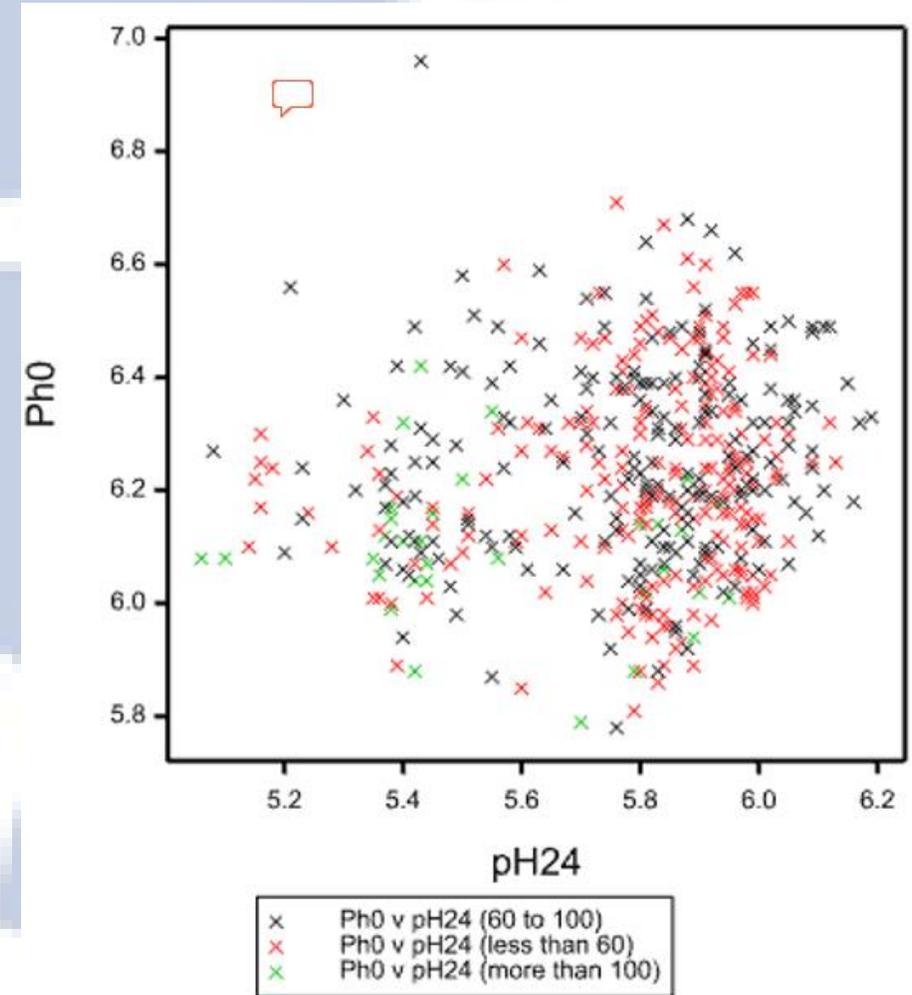
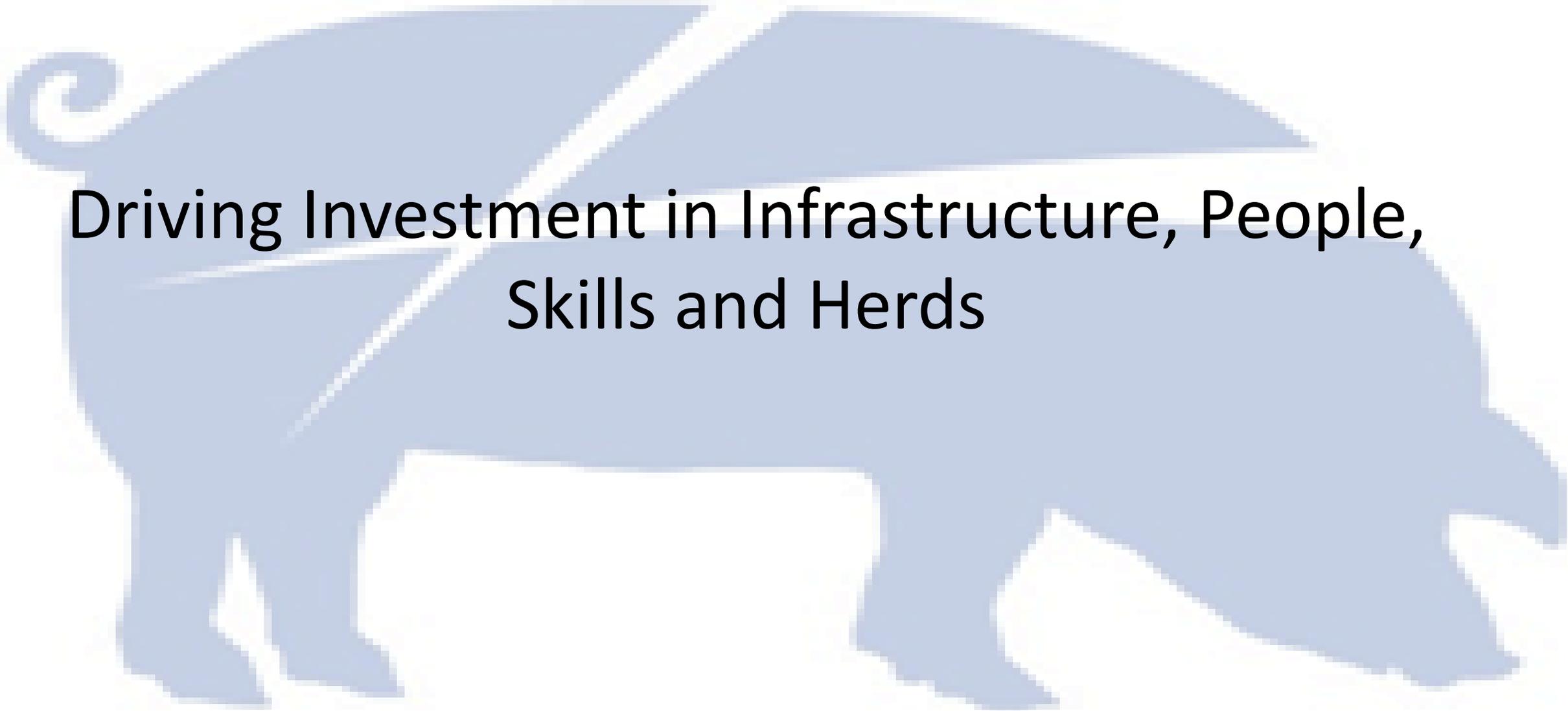
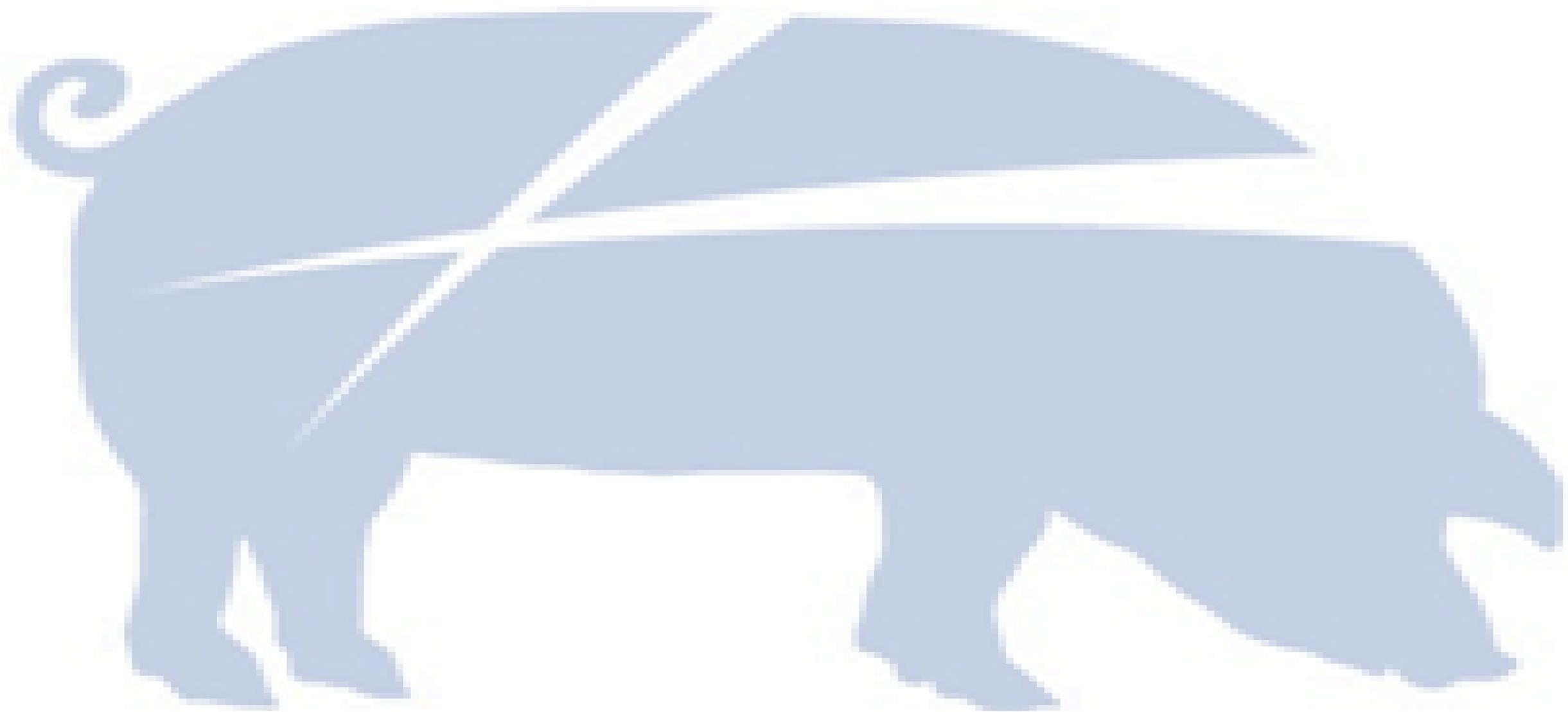


Figure 10. pH0 as function of pH24 from farms traveling different distances to the abattoir.



Driving Investment in Infrastructure, People,  
Skills and Herds



# Halls of Broxburn -2013



# Halls of Broxburn - 2014



# QPL Structure

BOARD



Richard Butterworth  
David Argo



Roderic Bruce (C)  
Patrick Stephen



Andrew Saunders

FUNDING



@£10m



£2.7m

OPERATIONS



# Supply Chain

PRODUCTION



Quality comes first

SCOTTISH PIG PRODUCERS LTD



**TULIP**

SLAUGHTER



Approved by SCOTTISH SPCA



**TULIP**

Cull Sows

Dawkins International Ltd

CUTTING & PACKING

# QPL Brechin



# 2016



# 2017



# Today



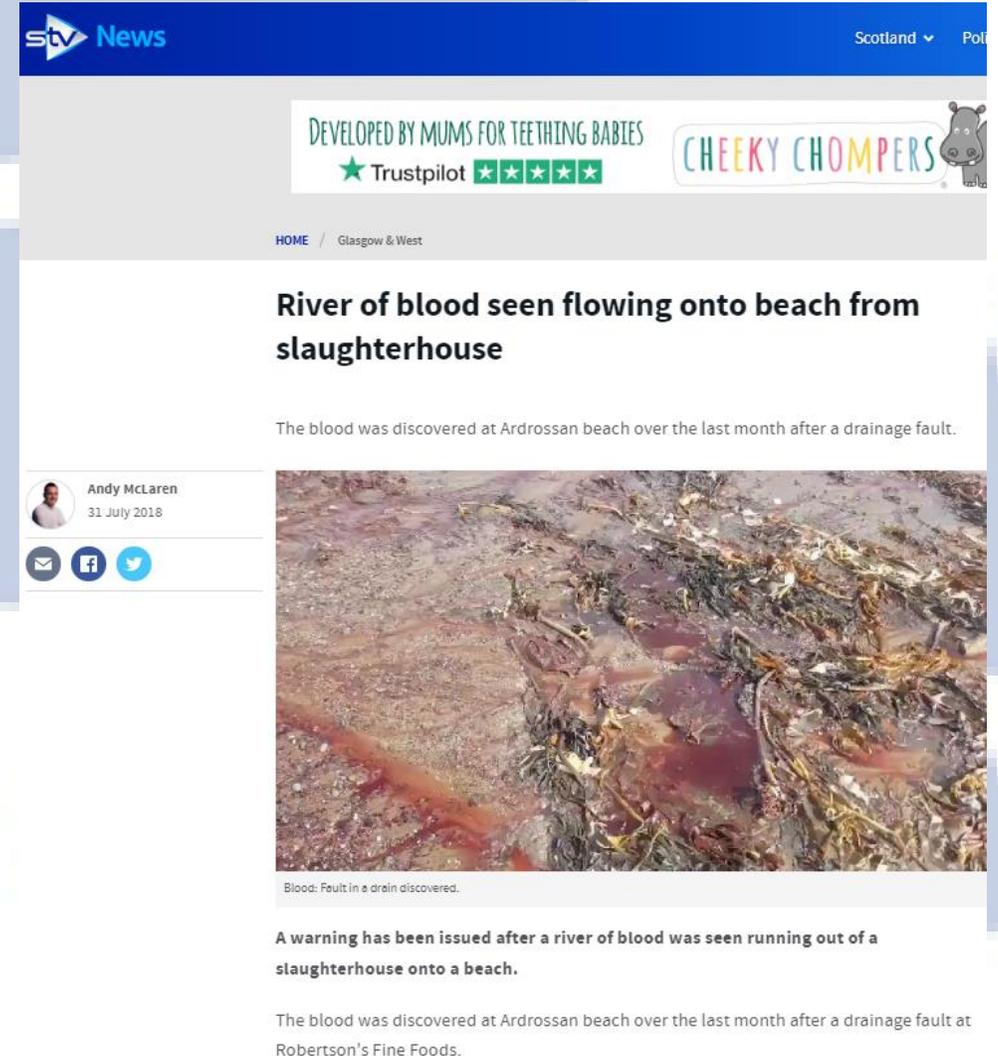
# 9. Increase Slaughtering & Processing Capacity

## Positive

- £560k FPMC grant for lairage, 2<sup>nd</sup> wash bay, equipment washing at Brechin
- Contract kill discussions with Woodheads

## Negative

- Dunbia have shut their boning plant at Drongan (old Nimmo site)
- Dunblane, Orkney and Elgin abattoirs closed, with Scotbeef Inverurie imminent



The screenshot shows a news article on the STV News website. The page header includes the STV News logo, a dropdown menu for 'Scotland', and a 'Post' button. Below the header is a banner for 'CHEEKY CHOMPERS' with a Trustpilot rating of five stars and the text 'DEVELOPED BY MUMS FOR TEETHING BABIES'. The article title is 'River of blood seen flowing onto beach from slaughterhouse'. The byline is 'Andy McLaren 31 July 2018'. The article text states: 'The blood was discovered at Ardrossan beach over the last month after a drainage fault.' Below the text is a photograph showing a large amount of blood on a sandy beach. A caption below the photo reads: 'Blood: Fault in a drain discovered.' At the bottom of the article, there is a warning: 'A warning has been issued after a river of blood was seen running out of a slaughterhouse onto a beach.' The final paragraph of the article reads: 'The blood was discovered at Ardrossan beach over the last month after a drainage fault at Robertson's Fine Foods.'

# 10. Address Medium-Term Skills Gaps and Map the Skills of the Future



## Skills Investment Plan For Scotland's food and drink sector

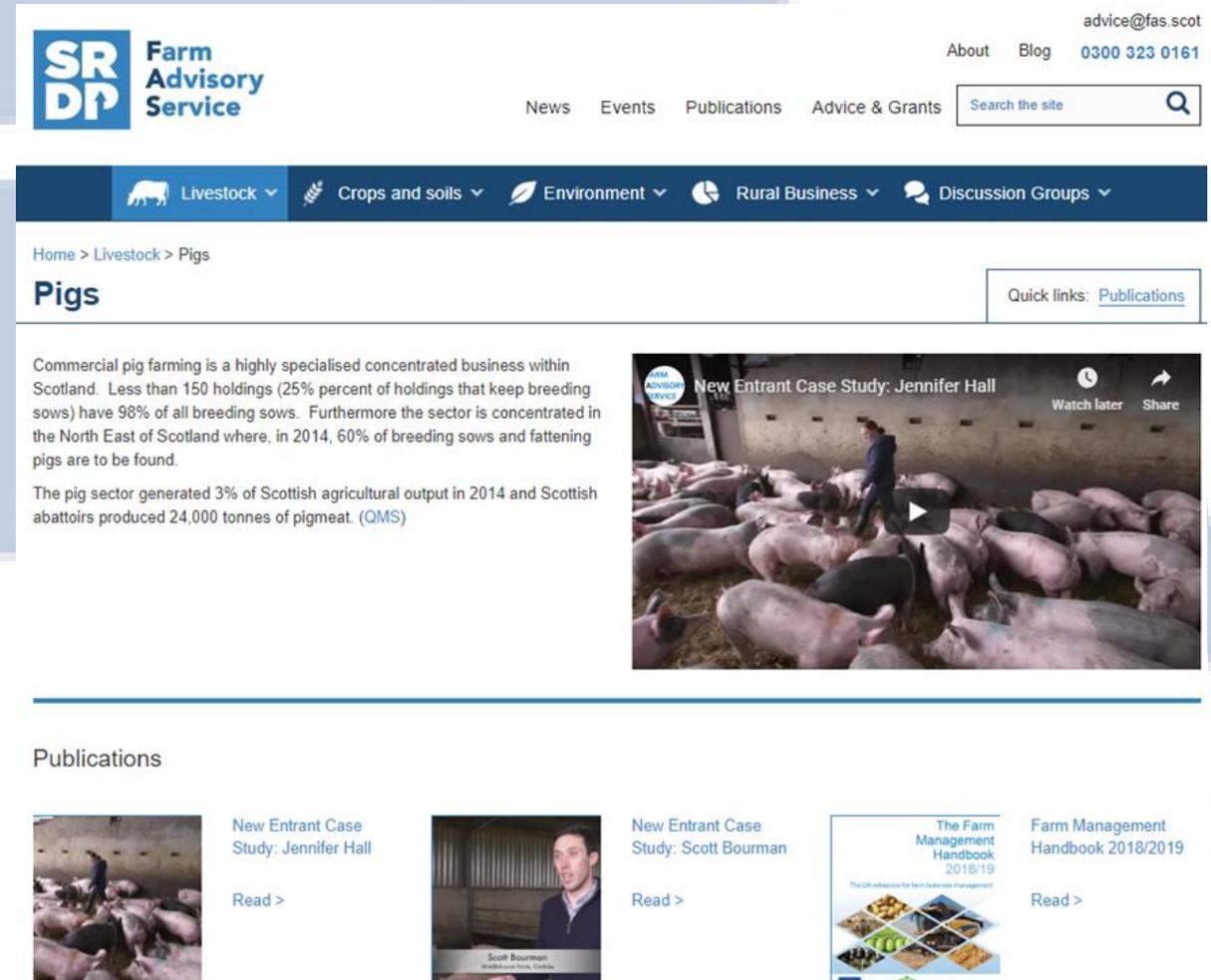
2nd edition



Home page
Foreword
<b>1</b> Purpose
<b>2</b> Progress and achievements
<b>3</b> Sector characteristics
<b>4</b> Skills demand
<b>5</b> Current provision
<b>6</b> Skills issues and challenges
<b>7</b> Action Plan
<b>8</b> Monitoring framework
Appendices & Acknowledgements

# 11. Generate a Pipeline of New Entrants in Pig Farming and Explore Finance Options

- Next Generation groups
- Involvement with Scot Gov Farm Advisory Service for New Entrants
- SRUC presentations
- Promoting pre-apprenticeships and work placements



The screenshot shows the Farm Advisory Service website. The top navigation bar includes the SRDP logo, contact information (advice@fas.scot, 0300 323 0161), and links for About, Blog, News, Events, Publications, Advice & Grants, and a search box. A secondary navigation bar features dropdown menus for Livestock, Crops and soils, Environment, Rural Business, and Discussion Groups. The main content area is titled 'Pigs' and includes a breadcrumb trail 'Home > Livestock > Pigs'. A video player is embedded, titled 'New Entrant Case Study: Jennifer Hall', with 'Watch later' and 'Share' options. Below the video, there is a 'Publications' section with three items: 'New Entrant Case Study: Jennifer Hall', 'New Entrant Case Study: Scott Bourman', and 'The Farm Management Handbook 2018/19'. Each item has a 'Read >' link.

advice@fas.scot  
About Blog 0300 323 0161

News Events Publications Advice & Grants Search the site

Livestock Crops and soils Environment Rural Business Discussion Groups

Home > Livestock > Pigs

Pigs Quick links: Publications

Commercial pig farming is a highly specialised concentrated business within Scotland. Less than 150 holdings (25% percent of holdings that keep breeding sows) have 98% of all breeding sows. Furthermore the sector is concentrated in the North East of Scotland where, in 2014, 60% of breeding sows and fattening pigs are to be found.

The pig sector generated 3% of Scottish agricultural output in 2014 and Scottish abattoirs produced 24,000 tonnes of pigmeat. (QMS)

New Entrant Case Study: Jennifer Hall Watch later Share

Publications

New Entrant Case Study: Jennifer Hall Read >

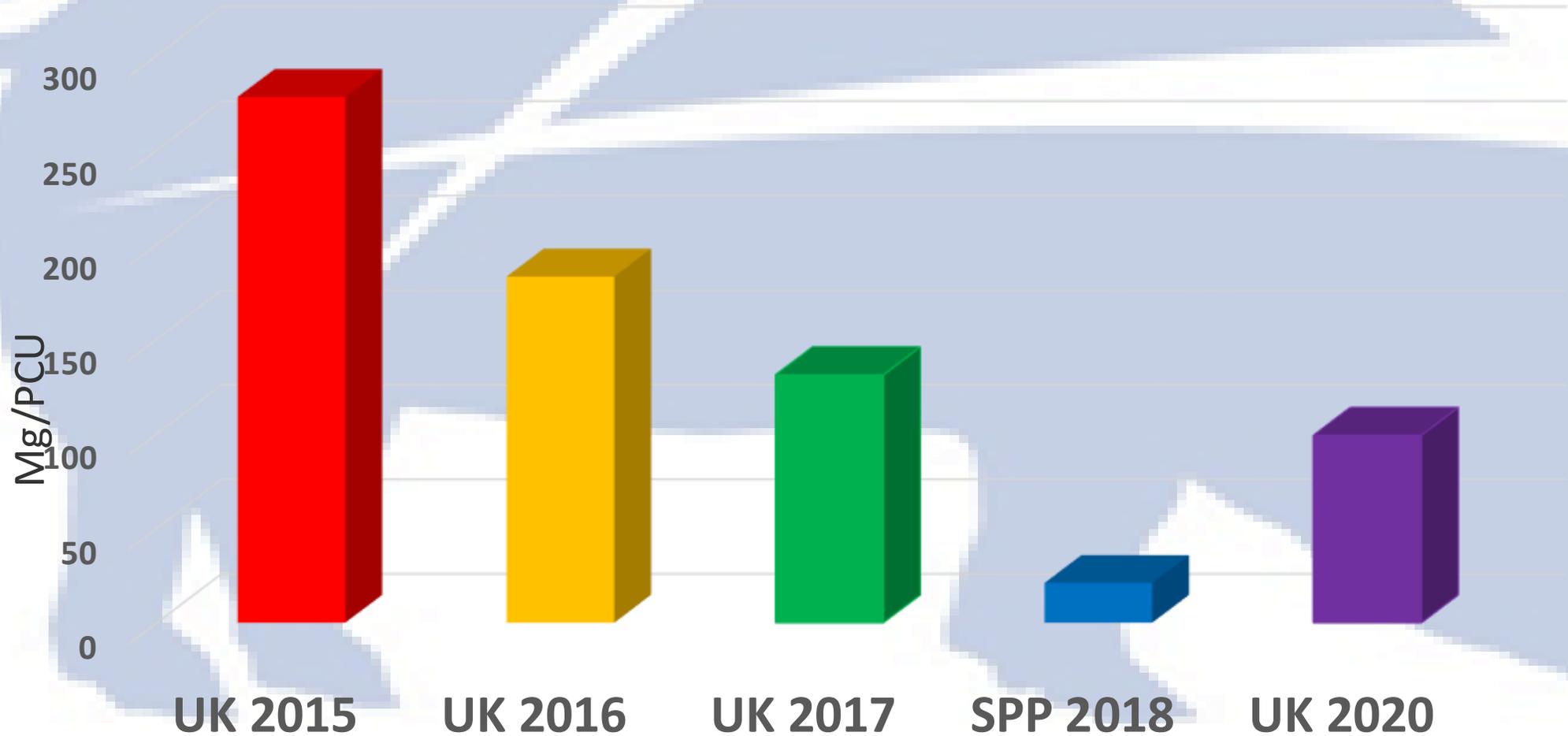
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The Farm Management Handbook 2018/19 Read >

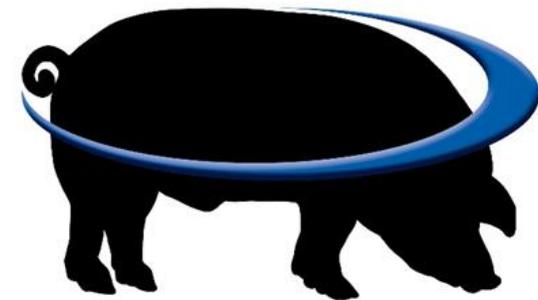


Leading the Way on Herd Health & Welfare  
Improvements

# 12. Reduce the Use of Antibiotics and Zinc Oxide

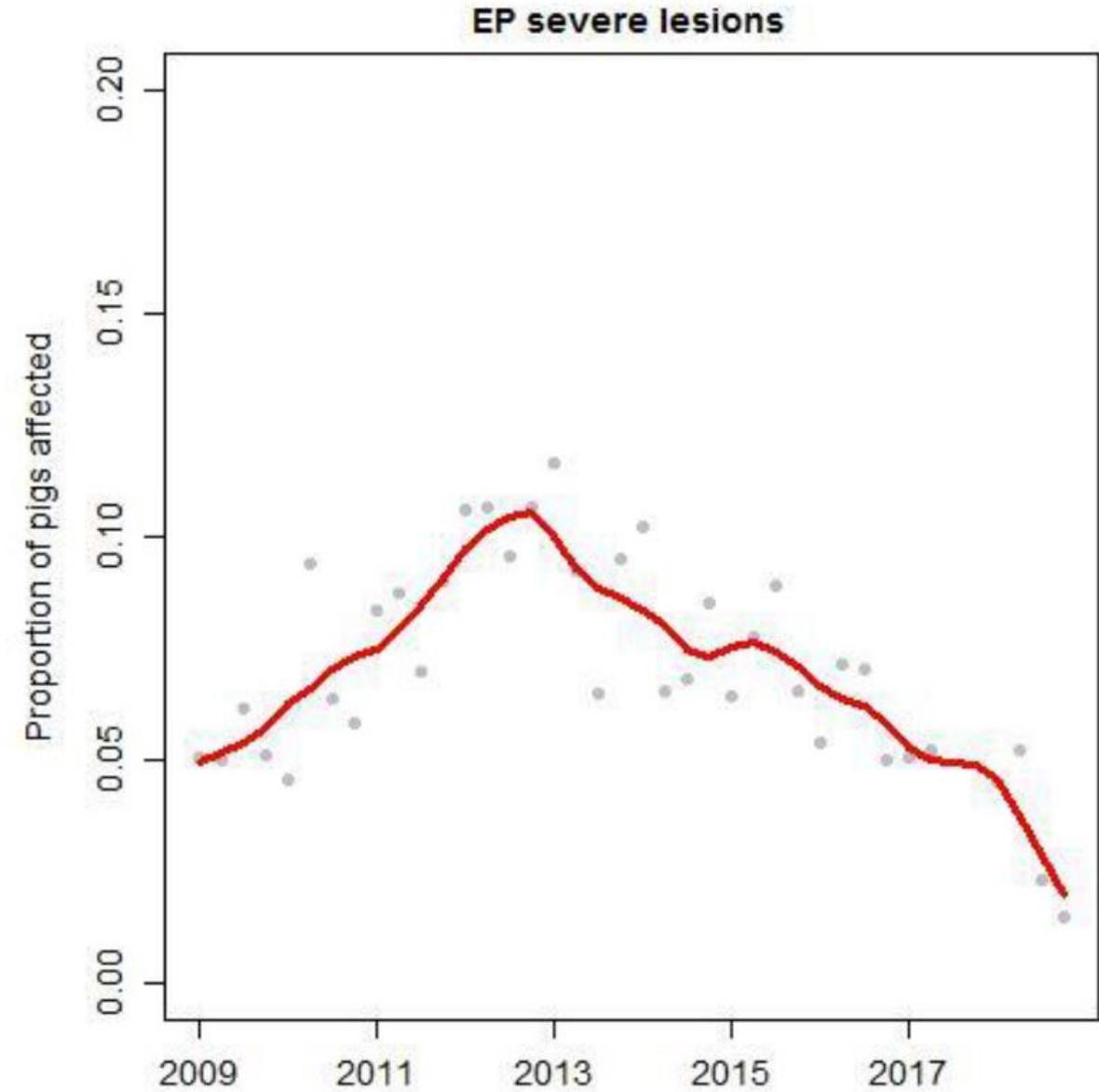
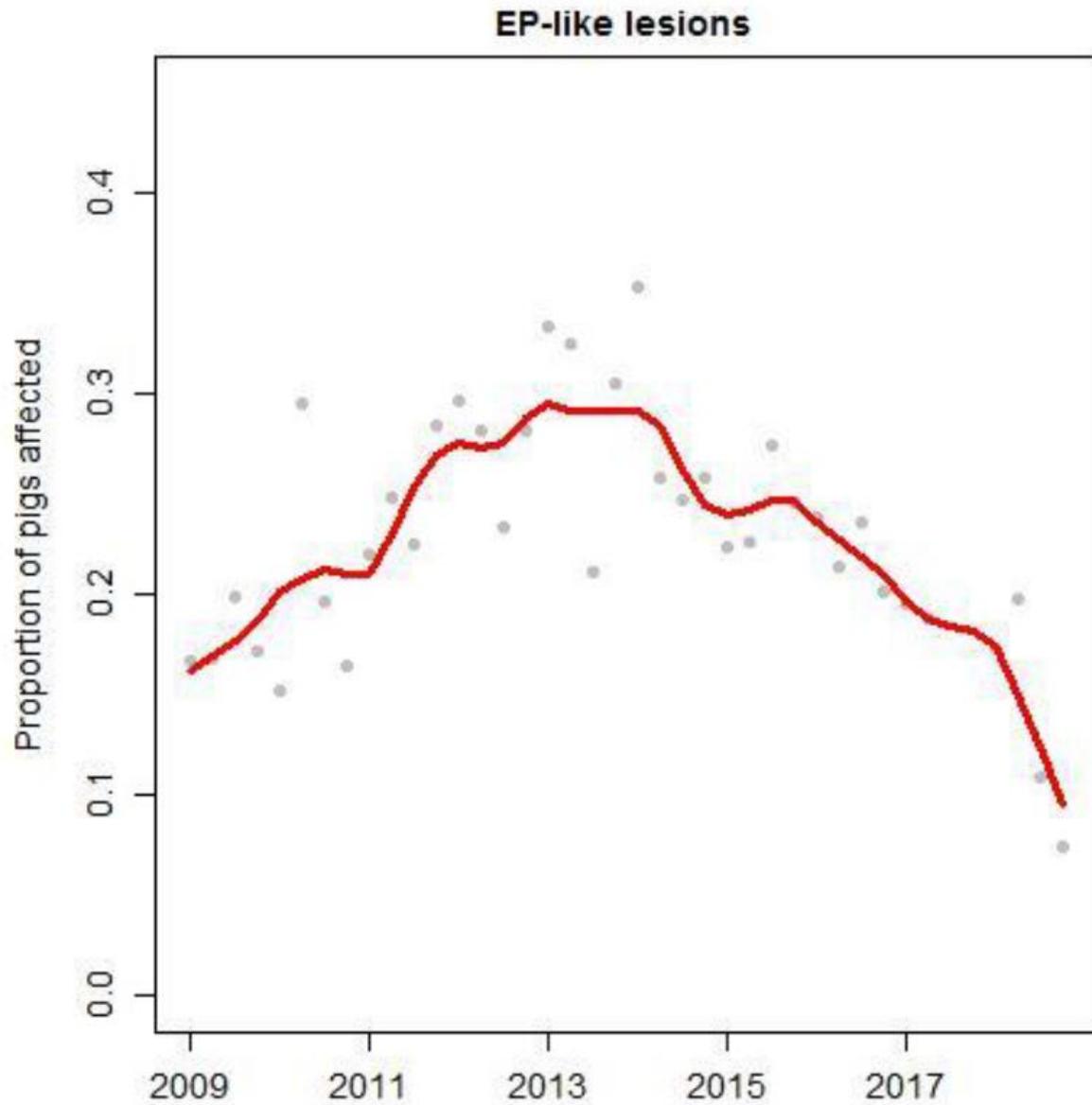


# Wholesome Pigs (Scotland) & SPDCC

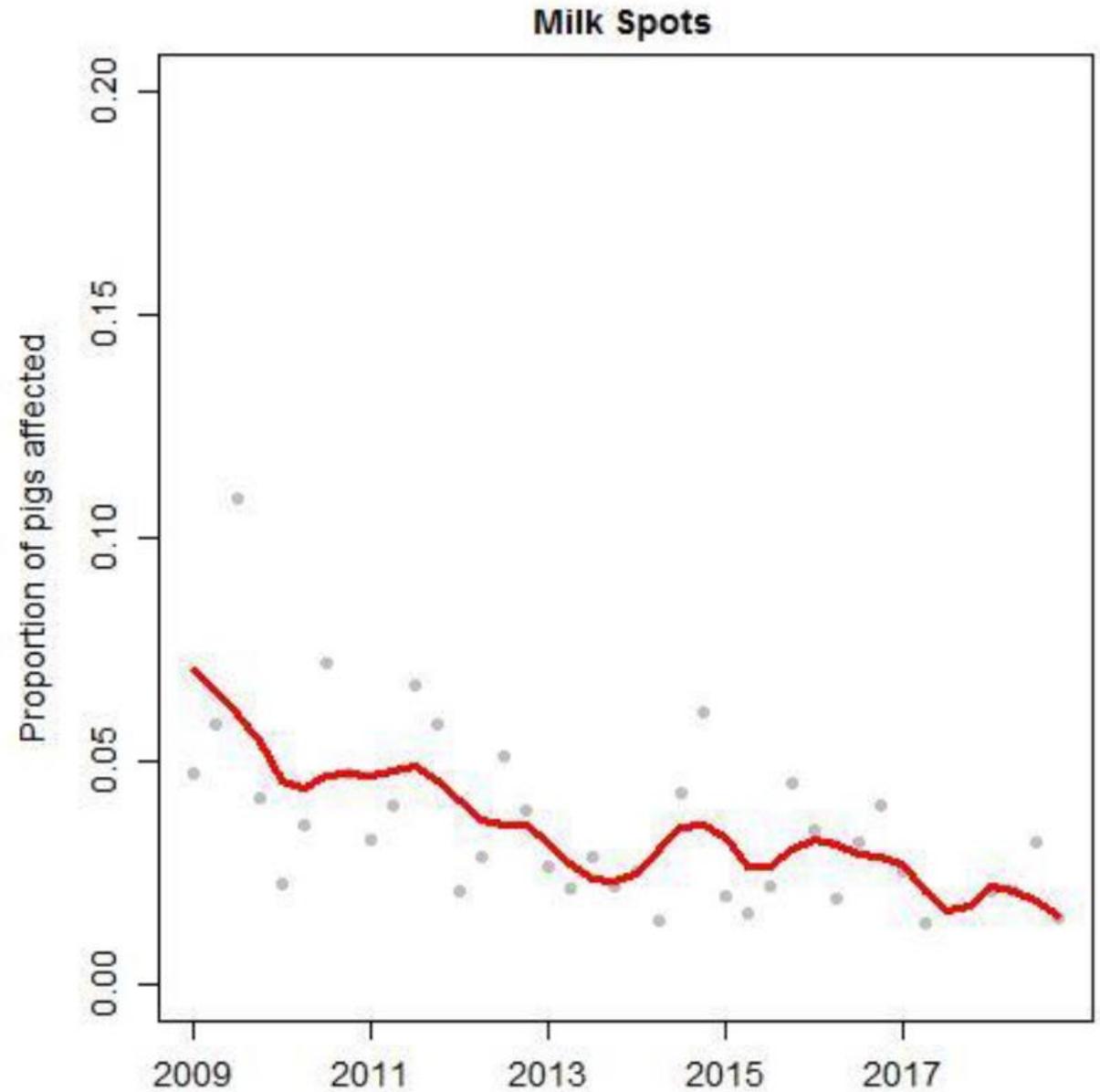
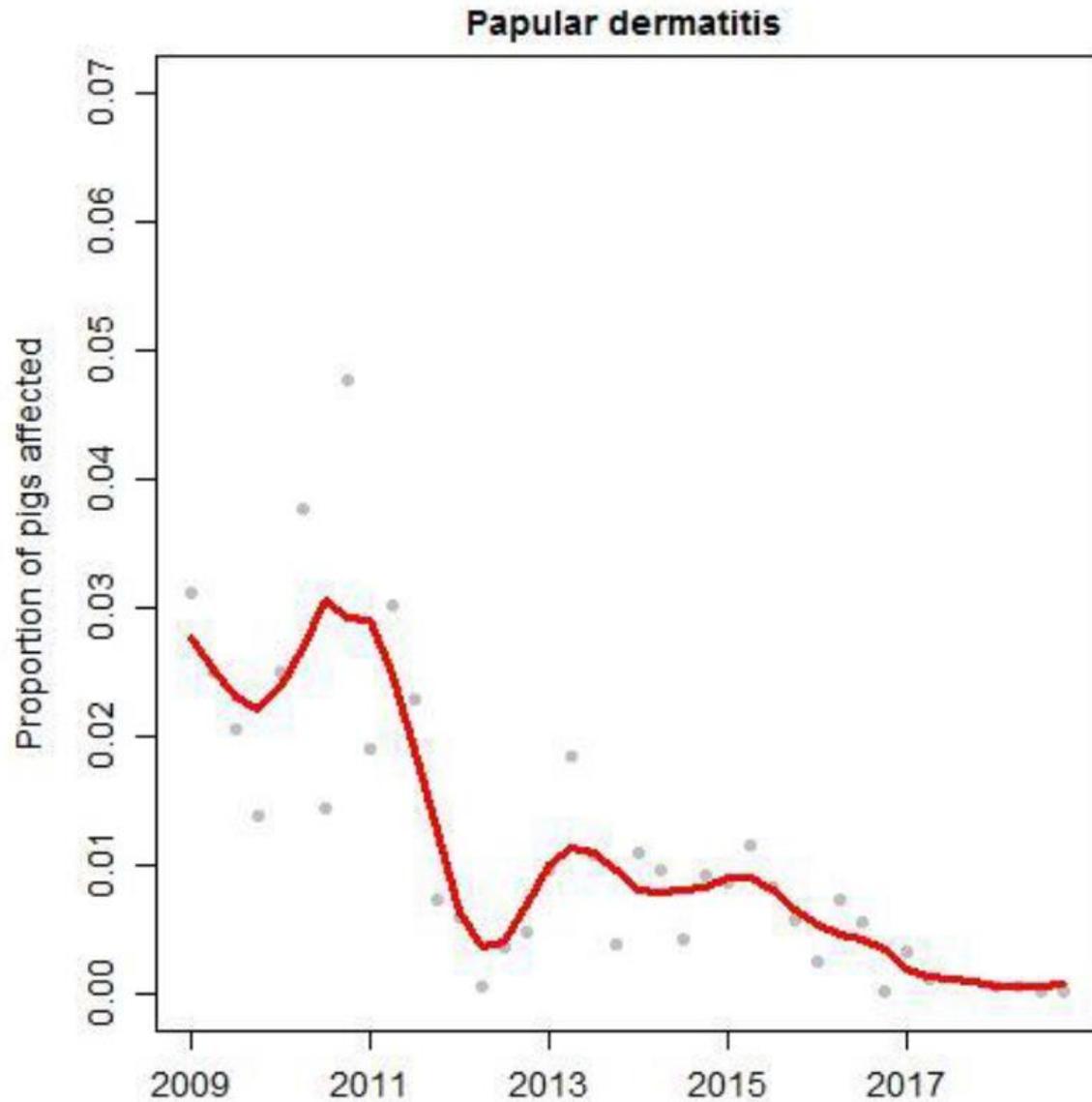


**Scottish Pig Disease  
Control Centre**

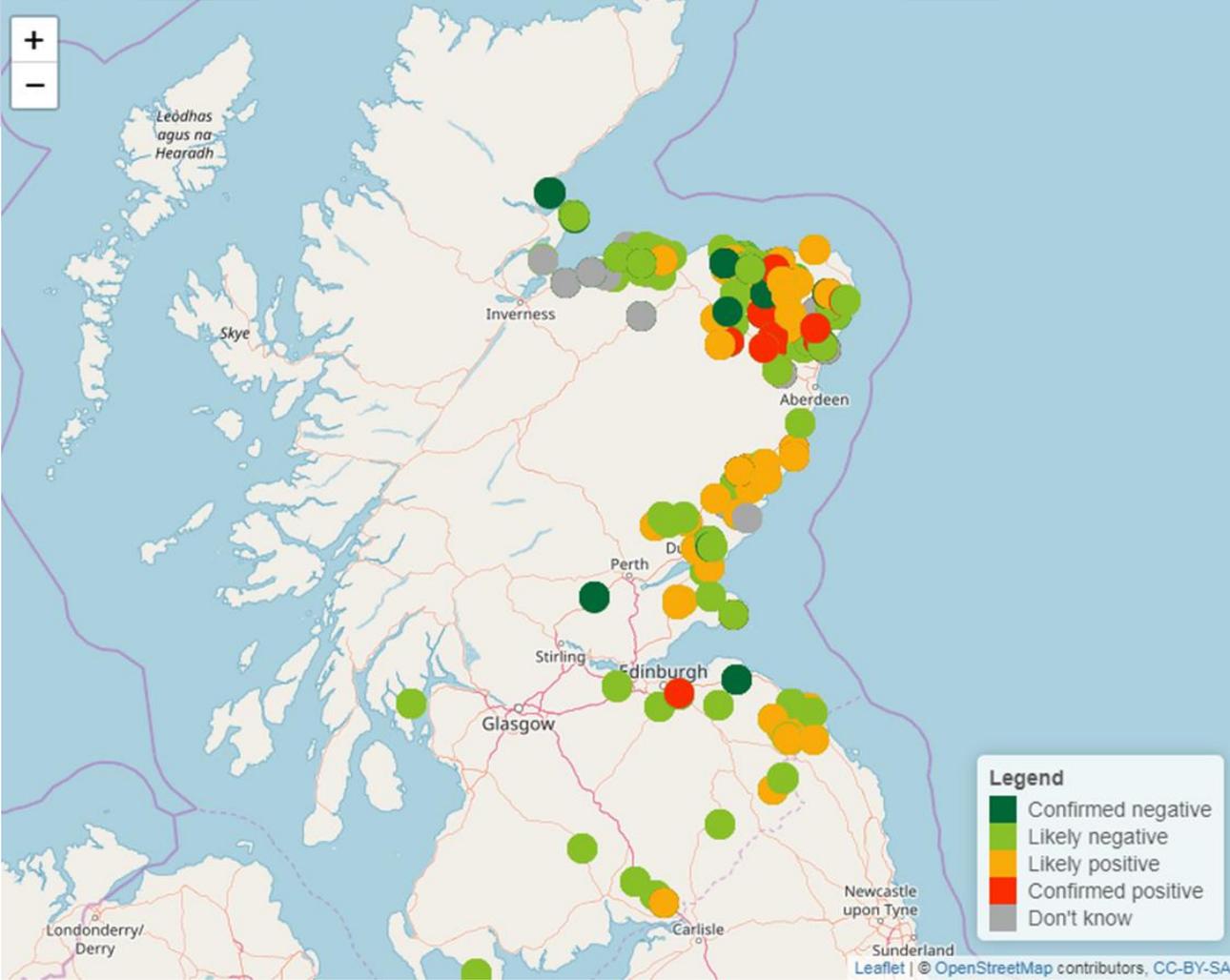
# 13. Advance Progress on Eradicating Disease



# 13. Advance Progress on Eradicating Disease



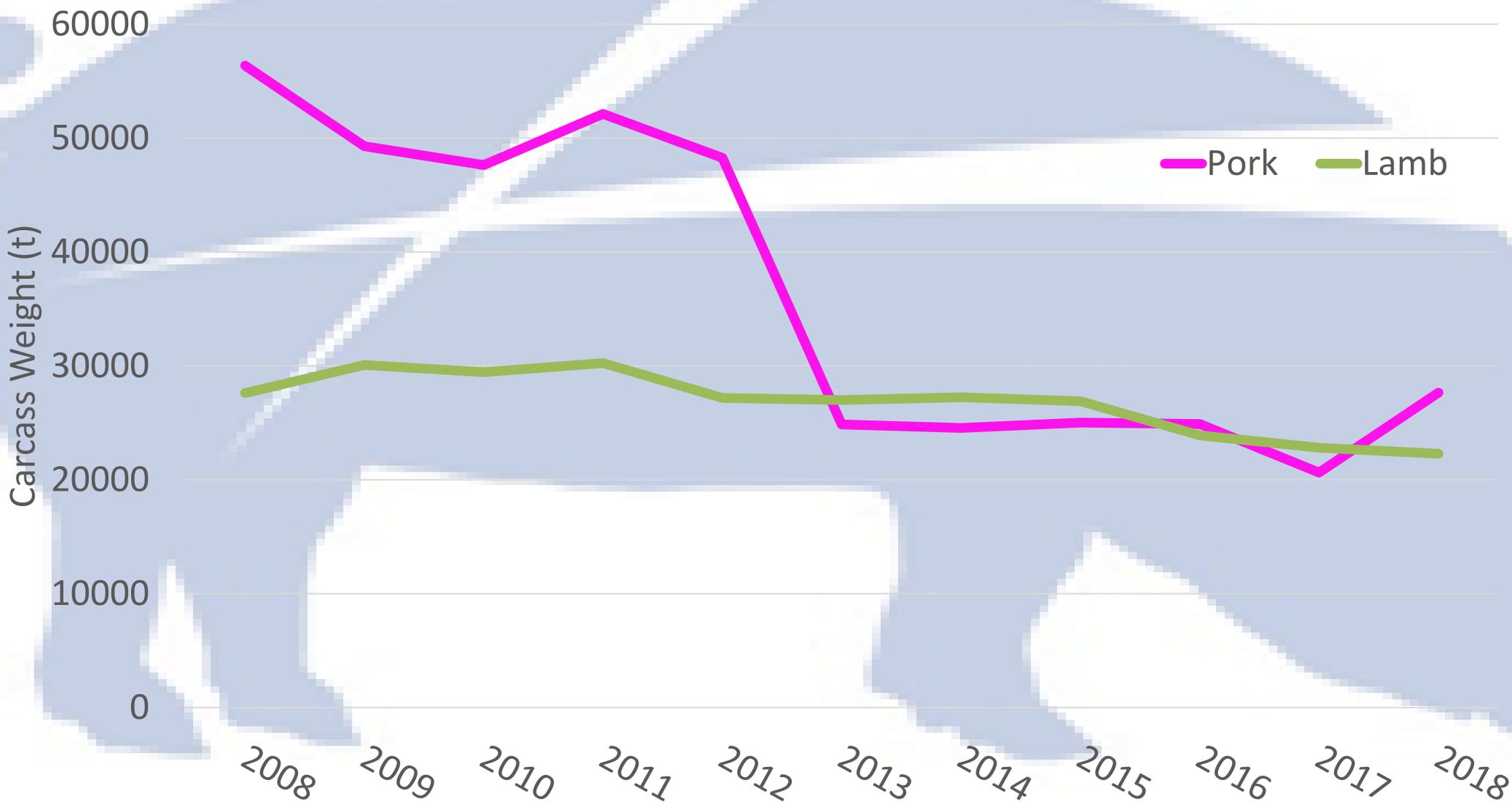
# 13. Advance Progress on Eradicating Disease - PRRS



# 14. Further Enhance Welfare



# Is It Working?



# African Swine Fever



Latest News World News Weird News Politics



## Bacon buttie CRISIS: Pork prices surge as China battles fatal African swine fever

THE price of bacon butties and barbecue ribs are set to skyrocket after a surge of African swine fever wiped-out tonnes of livestock in China.



By Sofie Jackson / Published 10th April 2019



BARREN BACON: Diseased pigs are predicted to push up the price of bacon sandwiches (Pic: ...)



Home Episodes Clips What Makes Us Human Podcast



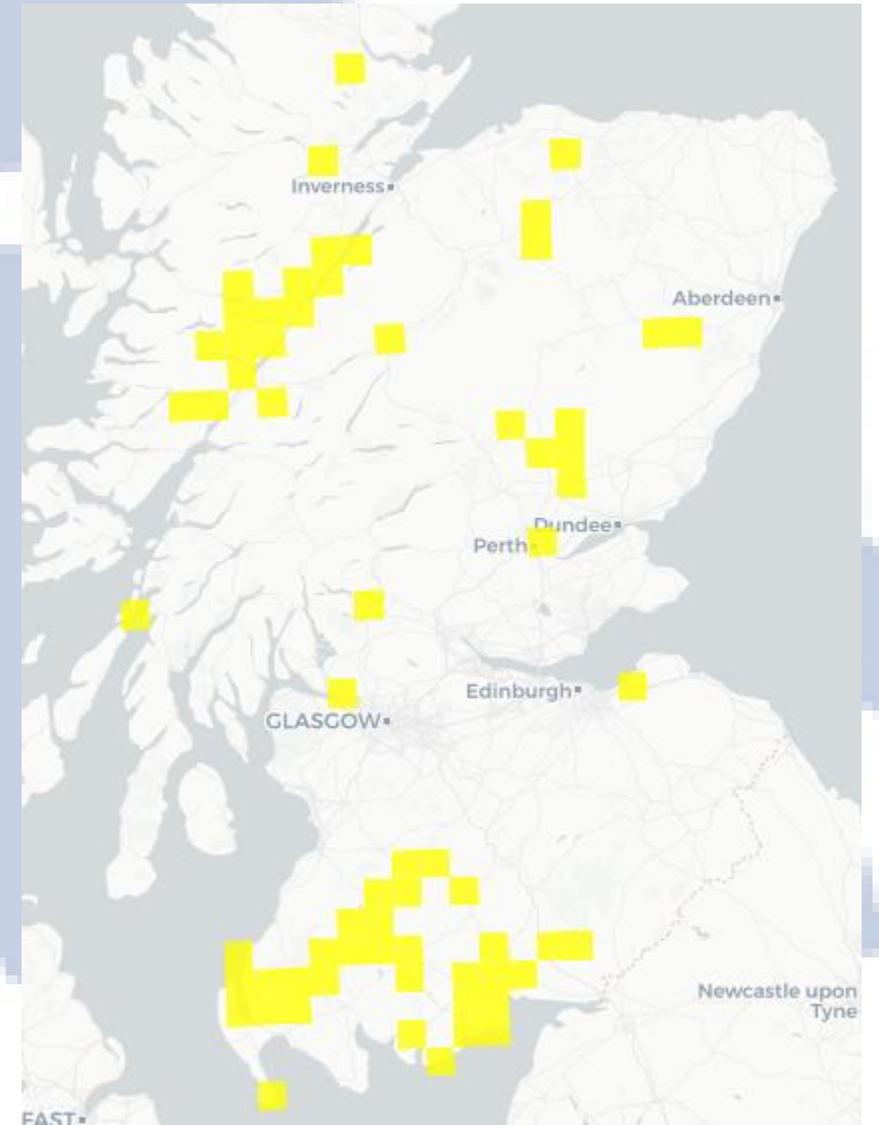
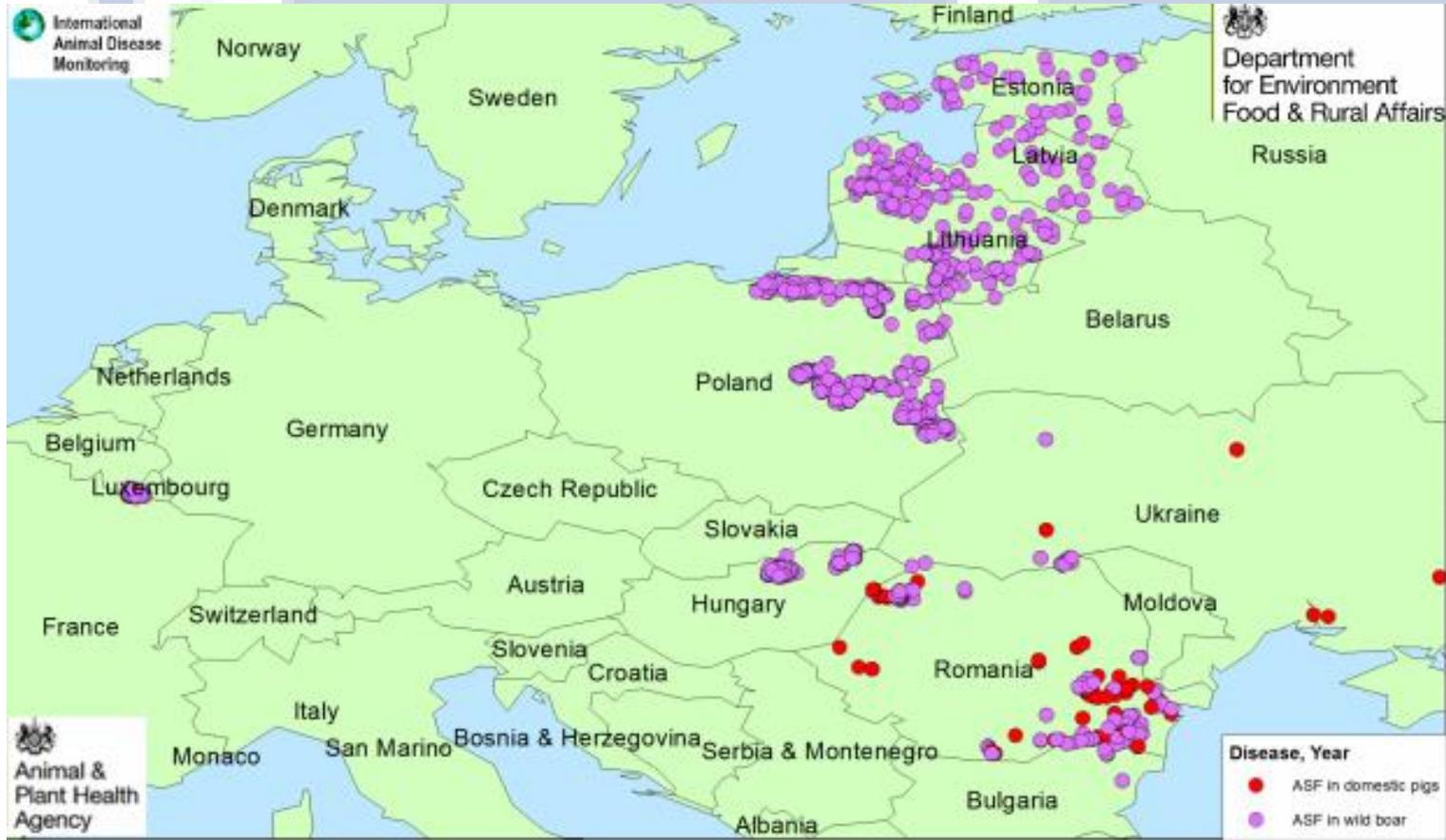
Listen now

## Traffic Lights and Chinese Pork

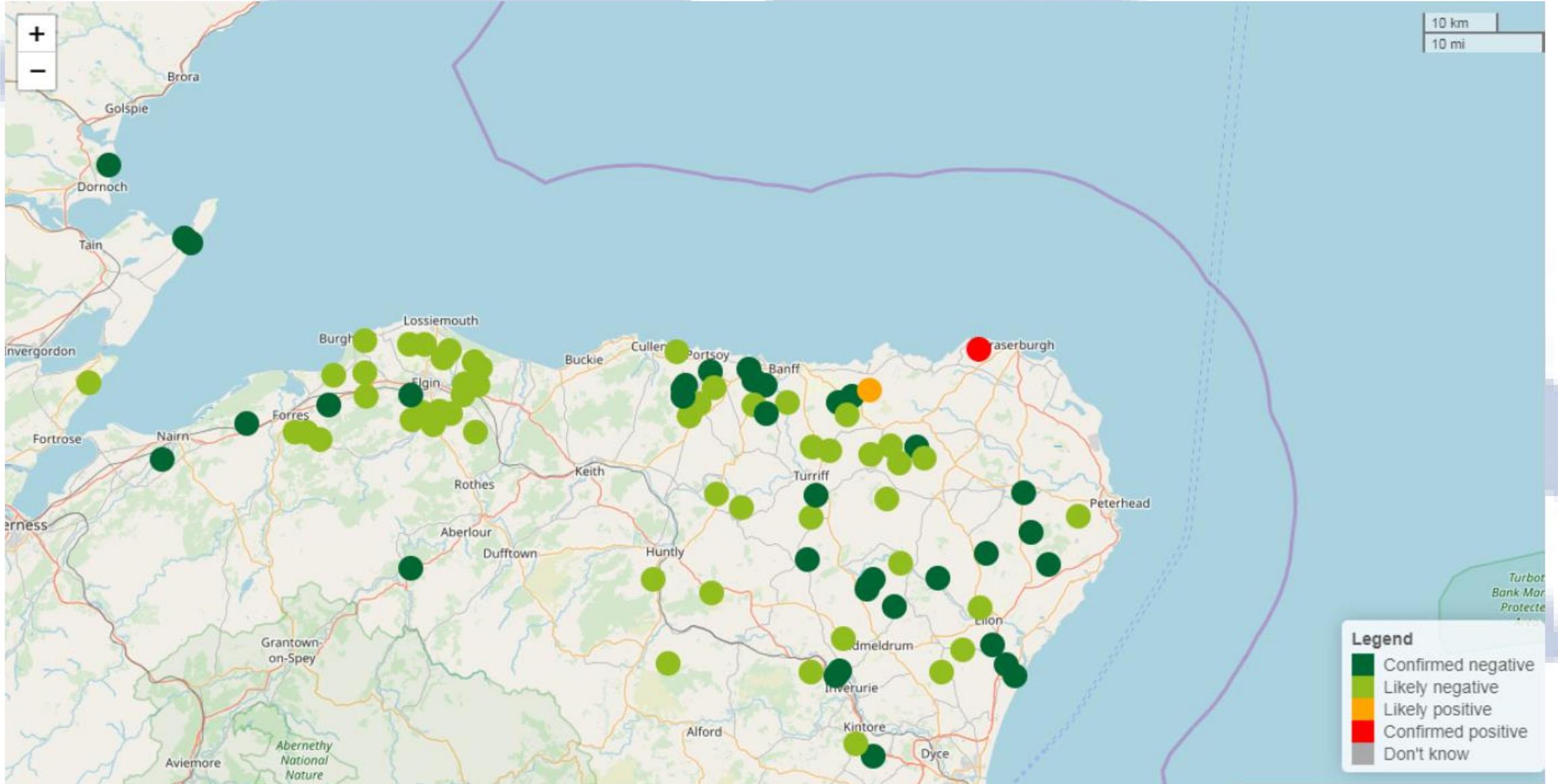
Jeremy discusses the Sri Lanka attacks, traffic lights which don't allow much time to cross the road, body odour and swine fever decimating the Chinese pig population.



# ASF in Europe



# Swine Dysentery



# Biosecurity

- Prearrange visit and respect “pig clear” protocols
- Leave your vehicle outside unit perimeter & contact manager before entering
- Use disposable or farm-provided clothing and boots
- Minimise contact with pigs and manure
- Consider everything taken on to the unit as contaminated
- Clean, disinfect and rest as long as possible before visiting another pig unit