

Pork Niche Market Working Group Survey Results

August 2004

Activities with an average score of 3.9 or greater in the Importance to Niche Pork column are considered Critical Issues as the PNMWG moves forward. These are the activities that appear in the shaded cells.

average scores from 67 responses from people involved in niche pork activities

(1=not very important to 5=very important; 1=not very appropriate to 5=very appropriate)

	Importance to Niche Pork	Rank on Importance to Niche Pork	Appropriate for PNMWG	Rank on Appropriateness for PNMWG
Help farmers keep records to determine costs of production for alternative systems	4.37	1	3.77	7
Production technical assistance/support for alternative systems	4.27	2	4.06	2
Consumer education/awareness to help understand various niche pork attributes/features	4.20	3	4.17	1
Help with targeting market segments most likely to be interested in the products	4.17	4	3.95	3
Market pork (help aggregate supply and secure markets)	4.12	5	3.05	23
Use production cost info to help niche pork companies develop financial info for prospective farmers and/or lenders	4.03	6	3.82	6
Help with carcass utilization issues	4.02	7	3.87	5
Help with promotional material development	4.00	9	3.57	12
Use production cost info to address production issues with individual farmer consultations and group meetings	4.00	8	3.69	8
Use production cost info to help niche pork companies set appropriate prices for farmers	3.97	10	3.49	13
Business organization and management assistance	3.97	11	3.88	4
Facility conversion support, including developing plans and examining feasibility and costs	3.94	12	3.64	9
Help develop quality control systems	3.91	13	3.63	10
Help with product pricing strategies	3.91	14	3.63	11
Help address transportation/logistics issues (processed pork to customers)	3.85	15	3.36	18
Assist in recruiting new producers into existing efforts	3.75	16	3.48	16
Processing/new product development support activities	3.68	17	3.49	14
Certification of claims – help select and/or develop systems	3.68	18	3.50	13
Provide meat quality sensory evaluation services	3.67	19	3.30	19
Developing financing options for individual farmers & groups	3.61	20	3.17	21
Provide generic market research services	3.53	21	3.48	17
Provide proprietary market research services	3.50	22	3.27	20
Help address transportation/logistics issues (live animals to slaughter)	3.47	23	3.02	24
Provide third-party certification of claims services	3.44	24	3.14	22
Develop multiplier herds with appropriate genetics for upgrading herds or replacement needs	3.06	25	2.20	25

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The "production technical assistance/support" and "business organization and management assistance" activities both had additional activities that respondents were asked to rank in order of importance. Respondents were also asked to offer additional thoughts about those activities.

<i>Production technical assistance/support topics for alternative systems (rank from 1 to 8, higher numbers are higher average ranking)</i>	
diagnostic services	3.52
breeding/farrowing scheduling, techniques, etc	4.05
breeding stock replacement strategies	4.54
facility design support	4.54
pig flow analysis	4.64
alternative health products evaluation and use support	4.71
vaccination protocols	4.89
nutrition support	5.05

Ideas for production/technical assistance support activities
Assistance finding products - feed, etc - needed for niche production. Non-GMO products/organic products - vitamins, etc (still cannot get non-GMO delivered feed in central Iowa)
Disease control regardless of production system - we had a closed herd & still ended up with a strain of PRRS that caused us to sell all the breeding stock (we raised both gilt and boar replacements)
Exploring certification options, quality management systems
Genetic evaluation, market discovery, quality assurance, certification programs, funding sources
I see the Pork Niche Market Working Group as a multi-organizational effort to fill in the gaps left by industry and extension. Cost of production, alternative herd health issues, vaccination protocols, etc. should ALL be swine production issues and therefore dealt with by the state extension system. Agreeably, the state extension system has not historically focused on organic and natural meats, it is time it got off the stick and carried their weight. The money you folks have to come up with is too precious to be squandered on projects it should be doing anyway. The PNMWG should be focused on bringing the various entities together, as they have been doing, with the intent of improving the marketing success of the business entities AND improving the production opportunities for the producers. PNMWG should be the "grease" to get these projects going. PNMWG should not be the vehicle by which this research is done. I think you're letting off scott-free the Iowa state extension service, because they should be the ones who are tackling these issues of cost of production, alternative swine systems, etc.
Pig flow, breeding schedules, facility sizing all tied together to maintain an all in all out of similar aged pigs. Nutrition itself is low, but adjusting the nutrition to find the least cost per cwt of gain is more important. Feed wastage, fresh feed, diet cost, ingredient cost all need to be looked at. Today most industry recommendations are for a 57% lean, highly productive sow weaned at 3 week. The recommendations change dramatically for a 49% lean pig from a sow breed to lactate 8 weeks. My thoughts is that diet price could be lowered enough to make feed cost per hundred weight gain competitive with any of system in spite of poorer feed efficiency. I need to find more examples in case study records. Vaccination protocols - absolutely, including choosing the right needle, plus proper injection. Mod live vaccine can be contaminated and pretty easily killed if not stored correctly. A lot of old refrigerators have worn out thermostats that vary widely. If the frig temp gets down to 32 F, the vaccine is useless for example.

Ideas for production/technical assistance support activities

Health problems - One thing is that PRRS is a very tough problem in large herds, it keeps recycling through. After about 5 months the virus starts going away, but naive gilts entering the system causing a new episode. PRRS impacts the immune status of the pig making it susceptible to other problems. In herds from niche markets where antibiotics are no longer a tool, the need for high immune status pigs is vital. We need to work on and share protocols for cleaning up and getting rid of PRRS from small herds. This may have to be done regularly in pig dense areas and bio-security protocols also need to be addressed. Don't forget that labor efficiency (after improvements made in herd health, genetics and feed cost) will ultimately determine whether this is a poor paying part-time job or a lucrative cash flow opportunity. Methods of feeding, cleaning, breeding etc need to be looked at and if labor saving ideas are found, they need to be shared.

Provide for general specifications for the type of market animal and how it will be raised. This type of information will be helpful to genetic suppliers so we can meet the needs. It is dangerous to recommend one particular genetic line. I marked diagnostic services lowest because we already have vets that can do that. Some assistance in deciphering results and applying them to the particular situation would be most helpful.

Question the groups role in this area, PNMWG does not have the capacity without a tremendous amount of support from a third party

The ISU extension service already had available a good swine record analysis system available. If used producers will know cost of production. I don't know how many field trips I have been on through practical farmers where producers don't have good records. The extension service already offers help for A, B, C, D, and F.

The order of importance will vary for operation and niche; they all must be addressed as a whole, not separately.

Where to purchase breeding stock or buy feeder pigs

*Business organization and management assistance
(rank from 1 to 4, higher numbers are higher
average ranking)*

developing internal profit & risk sharing contracts/agreements	1.79
advice & support on identifying and developing legal forms for businesses	2.17
help address internal communication needs	2.85
board training	3.19

Ideas for business organization/management assistance activities

identifying, utilizing new software/programs associated with running farm business

Interpret USDA niche pork regulations and legislation, identify possible government funding for niche pork alternatives

Method of polling market prior to idea/product development

Producers/board need to be empowered to make a difference once there is an understanding of the groups/organizations goals (needs & concerns)

This might be a better place for PNMWG to focus on some activities because I don't know how active ISU is with this kind of work, as opposed to the extension system which has been in place forever and is clearly mandated with SERVICE TO THE FARMERS. I would be even more excited if these efforts were focused on market development and infrastructure for processing animals and further added-value opportunities. For instance, it would be great to offer market opportunities for added-value "heat and eat" products made out of pork. We need desperate help to get rid of hams besides the conventional market.

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Respondents were asked to offer additional thoughts for the PNMWG to consider

Additional comments for PNMWG to consider
<p>Again, I want to reiterate I think the PNMWG should be focused on issues where ISU is not mandated to help. Sure they do some work in marketing, but not enough. Efforts about marketing should be pursued, while efforts towards production issues should be forced onto the ISU extension service. I am absolutely AGAINST any proprietary work by done by PNMWG. If there isn't enough money or work to go around and PNMWG folks are hiring out to do proprietary work, then why be affiliated with ISU and the Leopold Center? Hang your shingle outside your door and work. Otherwise, I look at these moneys that have been appropriated by the PNMWG from the Kellogg folks, etc., as public moneys. And for folks to be on the payroll because of these moneys, or to find these moneys, it would be a shame that there be done work on proprietary basis. hey, we're all in this together and the PNMWG information should be for everyone. Besides, we've already seen instances where public research from public moneys has resulted in withheld information.</p>
<p>Best way to have consumers try your product is to sample cook product at outlets for product.</p>
<p>Consider practical and legal merits of an agency in common umbrella organization to recheck risk of competitive price disadvantage or damage</p>
<p>I think new markets & transportation are very important</p>
<p>I would be careful in offering sensory assistance as indicators of pork quality. You are much better off using objective measures of pH, color, marbling, and some sampling for tenderness than using human sensory panels. A systematic process with trained individuals (non-biased) where groups of pigs are sampled on a regularly scheduled basis can be very effective quality control system. (At least if marketing superior palatability is the goal). This system will need to be closely tied to a genetic source in most cases. Niche marketers will need to include this testing and evaluation protocol in their projected cost of production to ensure a consistently superior-quality product that is indeed differentiated from the competition.</p>
<p>If farmers are to survive using alternative production methods, they must need help in marketing (all aspects).</p>
<p>If the industry of niche producers/processors is to ever harness demand to pull the products to market, this is the area to provide support. (Cost of production determination & benchmarking also is important). This is the area that University based individuals are generally best able to be effective in my experience.</p>
<p>Marketing in common may be important, but producer need and interest across niche groups is not evident.</p>
<p>Methods of advertising - what works, what doesn't. Develop cost effective advertising options. Help with media advertising in general. How to get products known by public.</p>
<p>Niman Ranch is a great example of bonding with chipotle to purchase lower priced primals, but still connect consumers with products they are looking for. Where are those companies? Why isn't it very important for a PNMWG to find those entities and then connect them to the respective source</p>
<p>Pork Board already has much of the market research information. Don't believe you need to be in the transportation business but could rather identify potential companies that provide those services. Marketing should be left up to the individual companies but could provide support services.</p>
<p>Sorry I didn't fill earlier - we lost so much money with only 80 sow herd, my husband works a 12 hr factory job and I have gone back to school to get another degree - my BS in ag has never paid the bills</p>
<p>The biggest concern I have with working with Niman is finding breeding stock that has been raised by Animal Welfare Institute standards, finding sows that have good mothering ability and do not lay on pigs in open pen environments.</p>
<p>Train niche pork buyers that paying for live animals is to be done promptly according to the Packers and Stockyards Act and not when they want to pay for it. Alert producers that it is best to have signed long term production agreements in hand first. If we produce it they will come doesn't cut it any more. Knowing cost of production is key without that how can you market your product.</p>