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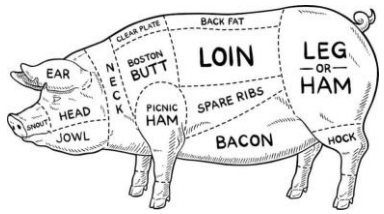
The future of global pig production – Where and how?



- Global pig production today
- Forecast from 2025 - 2034
- Global drivers
- Who will run the show?
- Merging markets
- Challenges
- Take home messages

Danish Farmers Abroad – Winter Conference 2026

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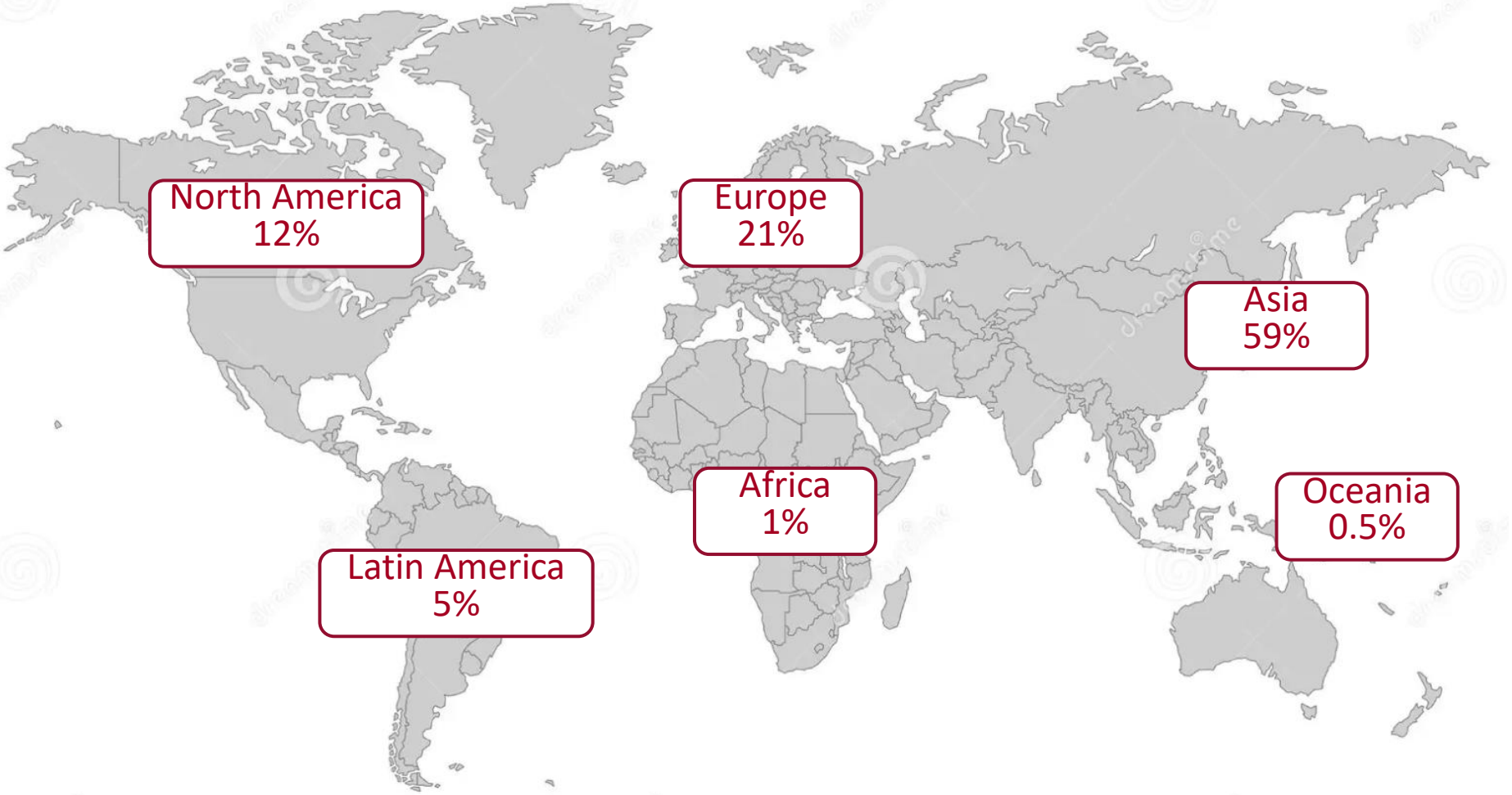
Global pig production today, 113-114 million ton



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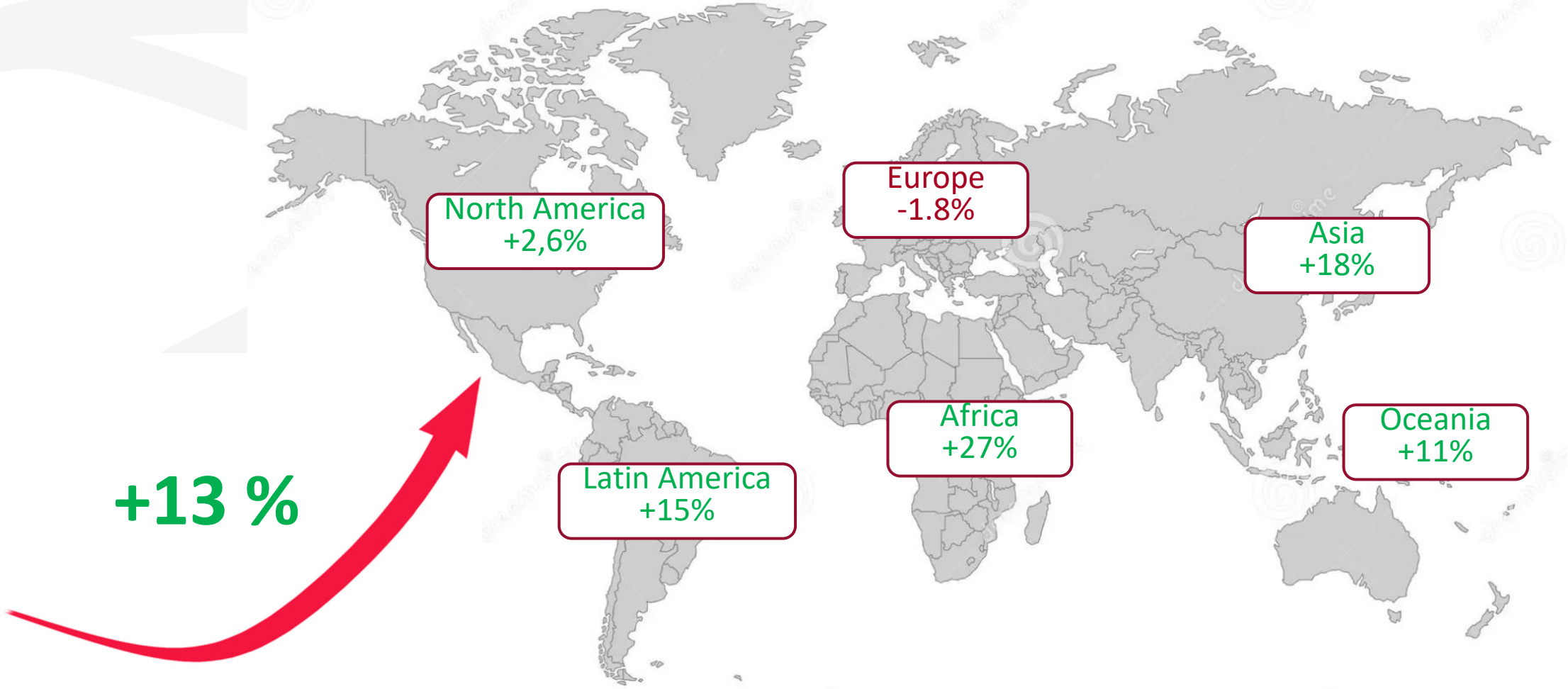
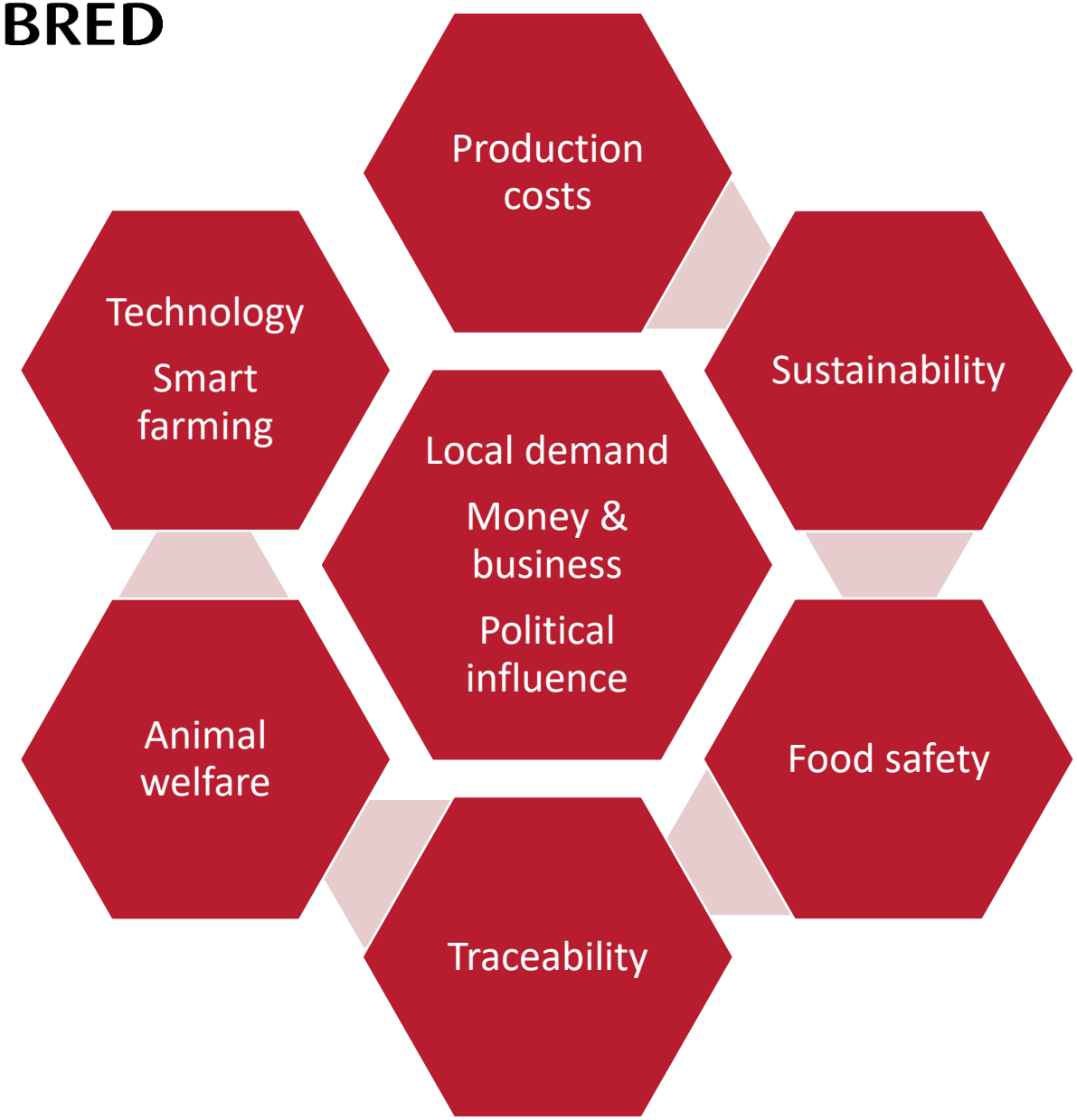
The forecast in 2034 is 130 Million ton



Global drivers

- Europe is trendsetter



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Who will run the show – global headlines

- ✓ A strong and rapidly consolidation in the sector
- ✓ Increasingly integrated production with +5,000 sow units
- ✓ Existing integrators are expanding
- ✓ New players are from the poultry industry and professional investors
- ✓ Lack of labor is a global challenges
- ✓ Technology on farms are increasing
- ✓ Smaller farms and farmers are closing
- ✓ Increasingly professionalism

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The big guys are dominant and are leading the show

- **North America**

Smithfield Foods	600,000 sows
Pipestone System	500,000 sows
Triump Foods	426,000 sows
Seabord Foods	335,000 sows
JBS	260,000 sows
Iowa Select	260,000 sows
Carthage System	180,000 sows
Prestage Farms	178,000 sows
Olymel	134,000 sows
Hy Life (CP Group)	132,000 sows
Etc……..	

- **Latin America**

BRF S.A	630,000 sows
Aurora Alimentos	260,000 sows
Agrosuper	250,000 sows
Bachoco	120,000 sows
Frimesa	110,000 sows
Grupo Porcicola	110,000 sows
Etc….	

- **Europe**

Vall Compnies	400,000 sows
Piensos Costa	170,000 sows
Smithfield/Animex	150,000 sows
Grupo Jorge	120,000 sows
Mazana Piensos	100,000 sows
Cefusa	90,000 sows
Jysap	90,000 sows
Ingafood	80,000 sows
Premier Pigs	70,000 sows
Cincaporc	60,000 sows
Goodvalley	35,000 sows
Etc……	

- **China**

Muyan Group	2,6 mill sows
Wens Group	1,8 mill sows
Smithfiled	1,2 mill sows
Zhengbang Group	1,2 mill sows
New Hope	1,2 mill sows
Techbank Food	0,5 mill sows
Etc….	

- **Southeast Asia**

CP Group	1,906,000 sows
NongHyup	150,000 sows
Betagro	120,000 sows
Thai Food	120,000 sows
CJ	120,000 sows
Harim Group	102,000 sows
Teratai	90,000 sows
Easy Bio	70,000 sows
Japfa	50,000 sows
Dabaco	40,000 sows
Green Feed	40,000 sows
New Hope	35,000 sows
Tai Sugar	30,000 sows
Inter Farm-Nippon Ham	27,000 sows
Etc…..	

Merging markets

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- **South America**
- Peru
- Uruguay
- Ecuador
- Paraguay
- Bolivia
- Colombia
- Argentina*
- Venezuela*

- **Southeast Asia**
- India
- Myanmar
- Laos
- Indonesia
- Cambodia
- Philippines
- (Malaysia)

- **Africa**
- Nigeria
- Malawi
- Angola
- Uganda
- Uganda
- Mozambique
- Cameroon
- Burkina Faso
- Madagascar
- South Africa
- Zambia

Merging markets – Developing with capital from Spain and China

Spanish investments

- Limited possibilities for growth in Spain
- The big food companies are investing in LATAM – typically, via Joint Venture
- Buying into smaller and medium size businesses

Chinese investments

- The business in SEA is mostly owned by Chinese families
- Chinese families are well established regional
- The big food companies from China are investing solely and via joint Venture

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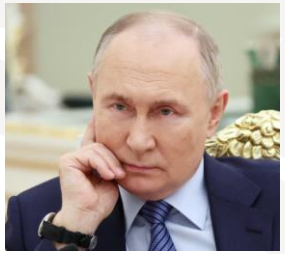
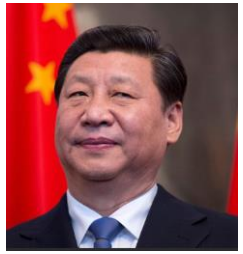
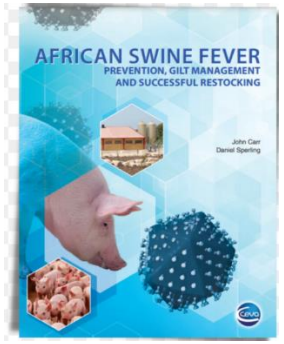
Challenges – the future is more unpredictable than ever ?

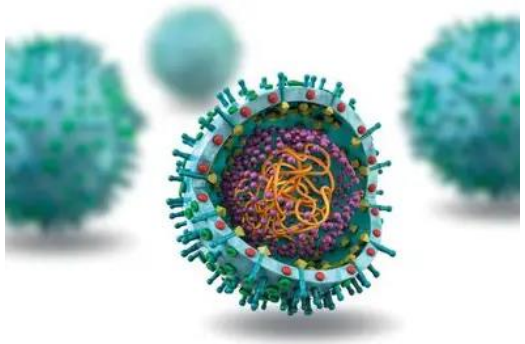




Geopolitics

- Trade wars and tarifs
- Access to raw materials





Diseases

- ASF in Europe, Asia and Africa
- PRRS - new and unmanageable strains in Spain and the USA
- New Viruses and strains

Customers acceptance and politics

- Animal welfare – Mainly in Europe Canada & the USA
- Environmental impact – smell & nature

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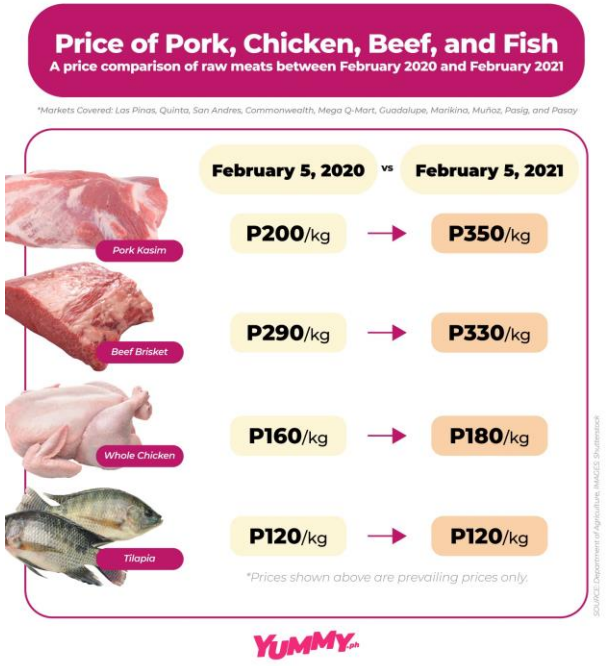
Take home messages

- **Merging Markets in Asia & Latin America will grow rapidly**
  - Demand, price and risks decides when, where and how fast
  - Feeding their populations and fresh meat is on the agenda

- **There are many opportunities for investing in the sector**
  - Know how is a strong capital – and Cash is king.

- **Europe is a significant player and will remain so**
  - Extreme consolidation for industrial farming
  - Massive pressure on sustainability and animal welfare
  - A small market for organic and outdoor production



Questions