

AFRICAN SWINE FEVER AND ITS EFFECT ON THE PROTEIN INDUSTRY



May 2019

Introduction

At Meadow Vale Foods we like to keep you informed as to what we feel are key drivers and developments in the poultry sector. The information we are receiving at this time suggests that the recent developments in African Swine Fever (ASF) are significant and very likely to impact future supply chains.

There is a lot of information out there so we have prepared a brief summary. Please get in touch if you want more information or to discuss this topic

What is African Swine Fever?

It's a virus that affects the health of domestic and wild pigs (wild boars) with often 100% mortality of infected animals. At present there is no known vaccine or cure.

Is there a risk to humans?

ASF is not a risk to human health

How does it spread?

Direct contact with an infected animal

Indirect contact – e.g. eating contaminated material

Contaminated materials and biological vectors (e.g. ticks)

How do you prevent or control it?

There is no vaccine currently available and due to the nature of the disease one is unlikely to be found.

The spread of the disease is prevented by enforcing import and biosecurity measures to ensure no infected live pigs or pig products are introduced into ASF free areas. Control is through humane killing with appropriate carcass disposal, through cleaning, country zoning and compartmentalisation.



YOUR PARTNERS IN POULTRY

Meadow Vale Foods Ltd, Units 18 & 19 Wilkinson Court,
Clywedog Road South, Wrexham Industrial Estate, Wrexham LL13 9AE
Tel: 0044 (0) 1978 66 100 Fax: 0044 (0) 1978 666 190

Email: enquires@meadowvalefoods.co.uk Web: www.meadowvalefoods.co.uk

Company Registration No: 2420250 Registered Office: The Mill, Morton, Oswestry, Shropshire SY10 8HB
VAT No: 549 6316 15

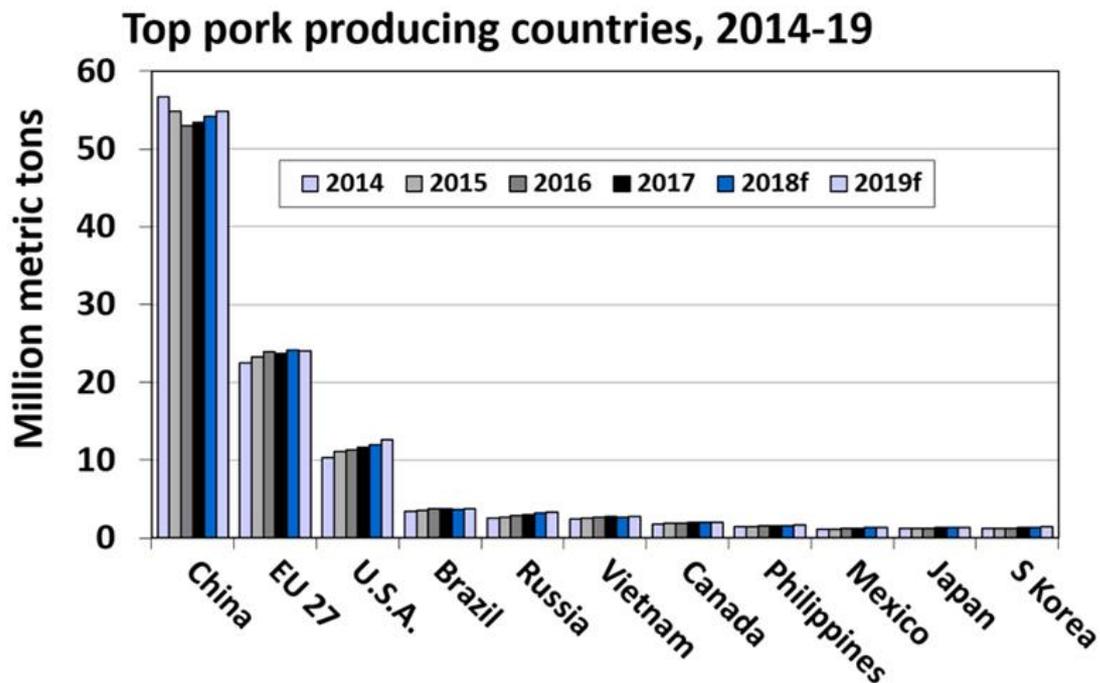


Where is it?

Asia, Europe, Africa

How important is ASF?

If you look at the graph below it is obvious that China is by far the largest pork producing (and consuming) country in the world. They have about half of the world's pigs. Production losses of between 25% and 50% are expected. Additionally herd sizes are likely to fall further as attempts to eradicate the virus are rolled out.



Source: USDA/FAS October 2018

What does this mean?

China's pork consumption will drop as the product is limited and there are food safety worries.



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What about other supplies?

No single supply source alone can plug the gap left by ASF so there will be additional imports to China and substitution to other protein sources. Additionally, this is not limited to China as ASF is in Vietnam and neighbouring Southeast Asian markets. This will increase the protein shortfall and the time taken to rebuild the herd.

What will they buy instead?

Poultry is the main beneficiary followed by eggs, seafood, beef and sheep meat. However, even with the growth of all other proteins there will still be a supply gap. Added to this there are some trade restrictions e.g. China does not allow imports of pork treated with ractopamine (a growth promoter used in some US pork production), which could be loosened. However, China are currently buying some US pork even with import tariffs of 62%.

How long will it last?

Suggestions are that there will be a 2-3 year period of rebuilding the Chinese pork herd with farms focusing on improved biosecurity. Recontamination risks will mean that gilts (first year maiden sows) will be retained thus further reducing production in the short term.

This is still a developing situation. If you would like regular updates please visit our website, or if you wish to discuss this further please speak with your usual contact.



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