



Season 5, Special Episode: U.S. Pork Leads the Way

Jessica Spreitzer, Director of Trade Analysis, U.S. Meat Export Federation (USMEF), shares emerging opportunities, an update on China's pork production, and the outlook for consumer demand, both domestically and abroad.

Background

The U.S. pork industry has shifted significantly in recent years due to African Swine Fever (ASF) affecting China's pork production. A recent decline in EU pork production has allowed the U.S. to become the largest pork exporter in the world for the first time, but competition from Brazil is increasing. This year, export volumes from the top exporters are higher than last year, despite China's lack of contribution.

EU Pork Production

Several factors have contributed to the decline in EU pork production. The spread of African Swine Fever has restricted export access for Germany, the EU's largest pork producer. Additionally, high input costs from feed imports and increased regulations have led many farmers to exit the industry, with few new entrants. The European Commission predicts that EU pork production will continue to decline over the next decade.

China Pork Production

China's pork production, which was significantly impacted by African Swine Fever in 2019, experienced a decline in 2020 and 2021. By 2023, production had rebounded to pre-ASF levels. However, in 2024, production fell by 1.7% in the first half of the year due to a surplus of pork in the domestic market. This market is currently facing challenges from economic pressures and declining consumer confidence.

International Demand

There are many emerging markets for pork producers in Southeast Asia, where pork plays a significant role in consumer diets. Latin America also presents numerous opportunities for U.S. producers, particularly in Central America, which has long been a key region reaching record levels of demand with continued growth. Current consumption in these markets is relatively low, indicating potential for increased consumption.

Outlook for 2025

The U.S. is currently exporting a record share of its pork production. When including pork variety meats, nearly 31% of total production is exported, with exports accounting for 34% of the value per head. The U.S. Meat Export Federation (USMEF) expects this share to continue growing as new opportunities are explored. Notably, the U.S. exports nearly half of its picnic and ham production, suggesting that without these exports, the country would not require nearly as many hogs as it currently raises. USMEF provides a variety of resources, including pork export statistics and data on primal cuts, on their website:

<https://usmef.org/>.

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