

Market demand for the production of pork: Quebec market reference (2003)

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Plan of the presentation

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- Methodology
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- Quebec Market Reference
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- Conclusion



Introduction

« Do Quebec hogs fit our market? »



*In order to assess the domestic and
foreign market needs*

- 1st investigation in 1998
- 2nd investigation in 2002
(Quebec Market Reference)

Methodology

Investigation with 19 enterprises

5 sectors

- Retail
- HRI
- Brokerage
- Further processing
- Slaughterhouses

Methodology

- Data was collected using a questionnaire
- Meetings with participating enterprises
- Validation of data
- Synthesis of data
- Final validation by slaughterhouses

Investigation results

Retail sector

- 3 food retailers
 - Sobey's
 - Provigo / Maxi / Loblaw's
 - Métro Richelieu / Super C
- 25, 30, 35 % of market share
- Domestic market



Retail sector

Main specifications

- Weight of the cuts
- LEA (37,5 – 40 cm²)
- Meat color (2 to 3,5)
- Loin marbling (1,5 to 3,0)
- Traceability

Retail sector

Comments

- Lean pork is appreciated
- Preoccupation about increase of weight of pork carcasses
- No pressure from consumers to produce specific pork

Retail sector

Comments

- Too much marbling could hinder sales
- Complain about lack of consistency (loin) and availability of meat

HRI Sector

➤ 3 food distributors

- T. Lauzon
- Viandes Premières
- Viandes Montcalm



- 70 % of the market share

- Quebec domestic market

HRI Sector

Main specifications

- Weight of the cuts
- LEA (40 to 44 cm²)
- Meat color (2 to 4)

Comments

- The increase of weight of carcass is a preoccupation
- Problem with the availability and consistency (tenderloin)

Brokerage sector

➤ 2 trading companies

- P.J. Impex
- Les aliments Canworld Ltée



- Domestic (20 %) and foreign (80 %) market

Brokerage sector

Main specifications

- Heavy pork carcasses (88 to 95 kg)
- Shoulder tattooing
- No coloured hair roots
- Traceability
- Color and marbling of the loin (3 to 4)
- Firm and white fat

Brokerage sector

Comments

- Market needs specific pork
- At stake: our capacity to be able to show that our pork is traceable and clean

Brokerage sector

Comments

- The production of hogs that have not consumed meat and bone meal, will become a demand
- Lean meat is appreciated



Further processing sector

➤ 7 meat processors

- A. Lafleur
 - Olymel SEC
 - Aliments Prince
 - Charcuterie de Bretagne
 - Les aliments de consommation Maple Leaf
 - Aliments Lesters
 - Alpina Salami
- Domestic and foreign markets



Further processing sector

Main specifications

- Priority for lean and boneless yield of the cut
- Fat firmness of the belly
- Weight of the cuts and meat quality (color, pH, ...)



Further processing sector

Comments

- Preoccupation about increase of the weight of the cuts
- Processing problem related to:
 - Belly fat firmness ????



Slaughtering sector

➤ 4 slaughterhouses

- Olymel SEC
 - Salaisons Brochu
 - Aliments ASTA
 - ATrahan Transformation
- 90 % of market share
- Domestic and foreign markets



Slaughtering sector

Main specifications

Priority for:

- Heavy carcasses (85,4 – 93,6 kg)
- Backfat thickness (13,6 – 23,5 mm)
- Lean yield of the carcass (58,4 – 62,9 %)
- Control of Salmonella, empty stomach and traceability



Slaughtering sector

Main specifications

- Any coloured hair roots on carcasses (1 to 20 \$ / carcass; frequency of 7,4 %)
- About loin and leg:
 - Priority is given to the quality aspects of the meat before weight of the cut and LEA

Slaughtering sector

Comments

- Complaints about light, lean carcasses (> 62,9 % and < 13,6 mm) and remaining coloured hair roots
- Opinions are divided about production of specific pork

Summary of all sectors

Market needs are not necessarily the same depending on commercial activities of the enterprise

Quebec Market Reference

The Quebec Market Reference (2003)

- Synthesis of market needs
- Significant contribution of slaughterhouse sector
- Represent 78 % of the market needs
- Meets an average of 36, 46, 62 and 71 % of the needs of retail, HRI, processing and brokerage sectors

The Quebec Market Reference (2003) *– Criteria of production*

- Hogs without halothane gene
- 17 to 24 hours fasting including 3 hours rest at the slaughterhouse
- From CQA™ sites



The Quebec Market Reference (2003) - Carcass



- No bruises
- No rind defects
- Readable shoulder tattoo
- No coloured hair roots
- Liver without parasites



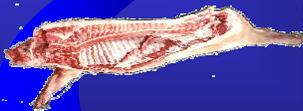
The Quebec Market Reference (2003) - Carcass



- Lungs without adhesions/pleura
- Empty stomach
- Controlled Salmonella
- Traceability desired



The Quebec Market Reference (2003) - Carcass

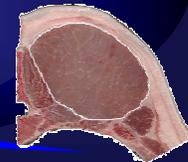


	Average	Range	
		Min	Max
Carcass weight (kg)	89,5	85,4	93,6
Backfat thickness at classification site (mm)	18,8	13,6	23,5
Estimated lean yield (%)	60,6	58,4	62,9

Primal cuts Loin C-200



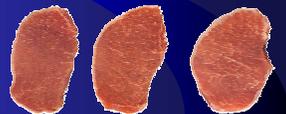
- Average weight : 8,8 kg
- Range between: 8,4 to 9,3 kg



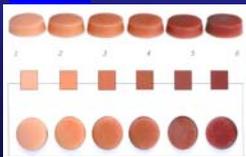
- Loin eye area: 43 to 47 cm²

Primal cuts Loin C-200

- Marbling: 2 to 4
- Fat: firm and white



Score 2 Score 3 Score 4



- Color : 3 to 4
- Bicolored muscle < 1 score

Primal cuts Leg C-100



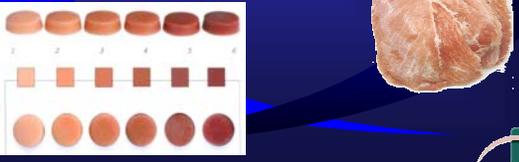
- Average weight: 10,2 kg
- Range between: 9,8 to 10,6 kg

- Thickness of fat: 12,6 to 20,5 mm
- Fat: firm and white



Primal cuts Leg C-100

- Color : 3 to 4
- Bicolored muscles : < 1,5 score
- Marbling: 1 to 2
- Steatosis: 0 to 2



Primal cuts Belly C-400

- Average weight: 4,7 kg
- Range between: 4,0 to 5,2 kg
- Thickness : 2,5 to 4,8 cm
- Width : 24,4 to 30,7 cm
- Fat: firm and white
- 3 layers of lean
- Fat/muscle ratio: 40/60 to 50/50



Primal cuts Picnic C-311 and Shoulder Boston butt C-320

Picnic (C-311)

- Average weight : 4,0 kg
- Range between: 3,7 to 4,2 kg
- Color: 4
- Fat : firm and white

Shoulder Boston butt (C-320)

- Average weight : 3,8 kg
- Range between: 3,6 to 4,1 kg
- Color: 3 to 4
- Fat : firm and white



Primal cuts Ribs C-505, C-500 and Tenderloin C-228

Back ribs (C-505)

- Average weight : 550 g
- Range in weight: between 500 to 600 g

Belly ribs (C-500)

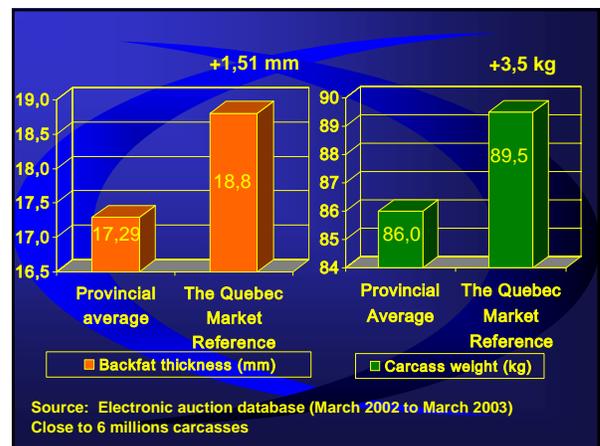
- Average weight : 1,7 kg
- Range in weight: between 1,5 to 1,9 kg

Tenderloin (C-228)

- Average weight : 333 g
- Range in weight: between 250 to 400 g



Quebec hogs and the market needs



Proportion of hog carcasses which meet the specifications demanded

	Range	<	% in the range	>
Carcass weight (kg)	85,4 – 93,6	45	48	7
Backfat thickness at classification site (mm)	13,6 – 23,5	19	74	7
Estimated lean yield (%)	58,4 – 62,9	7	73	20

Source : Electronic auction database (March 2002 to March 2003)
Close to 6 millions carcasses



Proportion of hog carcasses which meet the specifications demanded

	Range	% in the range
Stomach	Fasting	94
Liver	Without parasites	94
Lungs	Without pleura/adherences	65
CQA™ Program	From certified sites	82

Source : Electronic auction database (March 2002 to March 2003)
Close to 6 millions carcasses



Proportion of hog carcasses which meet the specifications demanded

Meat quality	Range	<	% in the range	>
Loin color	3 – 4	47	52	1
Loin marbling	2 – 4	41	59	-

Source : Testing Deschambault Station results (1999-2002)
1400 commercial hogs



Conclusion

Conclusion

On the basis of the results of this investigation:

- There are different pork requirements
- According to the slaughterhouses, the features of the Quebec market reference represent 78 % of the market needs



Conclusion

- The requirements concern the criteria of production, the carcass, the cuts, and meat quality
- Quebec hogs do not completely meet the demands



Conclusion

Challenge to be met:

- ↑ Carcass weight
- ↑ Backfat thickness and ↓ lean yield of the carcass

➤ To be improved:

- Control of coloured hair roots
- Firmness of belly
- Color and marbling of the meat
- Control of Salmonella, empty stomach and traceability

