

Dutch Preliminary WP3 Findings: 3 Pork chain cases WUR /CLM Henk Oostindie, Rudolf van Broekhuizen, Eric Hees

Selected Pork Chains

- Parma Ham
- Generic Ham
- Cinta Cinese
- Global Good Farming Pork (VION company)
- Sustainable Pork Chain (HoeveBV)
- Lupine Pork (Individual farm-woman driven)

Selected attributes for comparison:

- Added Value; Affordability; Chain Governance
- Animal Welfare; Labour relations; Territoriality
- Biodiversity, Resource Use Efficiency
- Food Safety, Resilience

Guiding research questions

- RQ 1: How to (further) characterize and distinguish the 6 selected pork chains in terms of local versus?
- RQ2: How to (further) characterize the 6 selected pork chains in terms of local-global dynamics?
- RQ3: What are most significant and meaningful dimensions, attributes and indicators to assess, measure and compare the performances of the 6 selected pork chains?
- RQ4: To what extent and in which ways do pork chain stakeholders agree or disagree about relevant performance dimensions, -attributes and -indicators?
- RQ5: How are selected pork chains performances influenced by prevailing policy- and wider regulatory frameworks?
- RQ6: What is the methodological strength and weakness of overall applied double pairwise comparative analysis with its specific combination of quantitative and qualitative approaches?

Local versus Global Boundary Setting

- Interwovenness of both notions reflected in complex interrelations with markets (input and output) and multiple chain involvement of actors
- Geographical distance of markets less meaningful criteria to distinguish local and global pork chains
- Localness: Primarily associated with distinctive chain governance characteristics (e.g. more commitment, more collaborative learning, more resilient)
- Dynamic notions that mutually interact!

Performances of Global Good Farming

- Highly affordable and accessible
- Large total amount of added value in strict economic sense
- High resource use efficiency in terms of input-output relations
- Animal Welfare, Food Safety and Labour Relations most criticized performance attributes
- Chain governance characterized by conflicts, distrust, volatility and disinterest
- High 'external' costs
- Increasingly vulnerable (loss of ability to persist, to adapt and to transform at different levels)

Performance Sustainable Pork Chain

- Only slightly less affordability and accessibility
- Lower total added value, but somewhat more farmer-beneficial distribution of added value
- Better environmental performances (LCA-analysis)
- More trust based and learning oriented chain governance
- Biodiversity, Labour Relations and Territoriality less distinctive attributes
- More resilient in terms of ability to persist, to adapt and to transform

Performances Lupine Pork

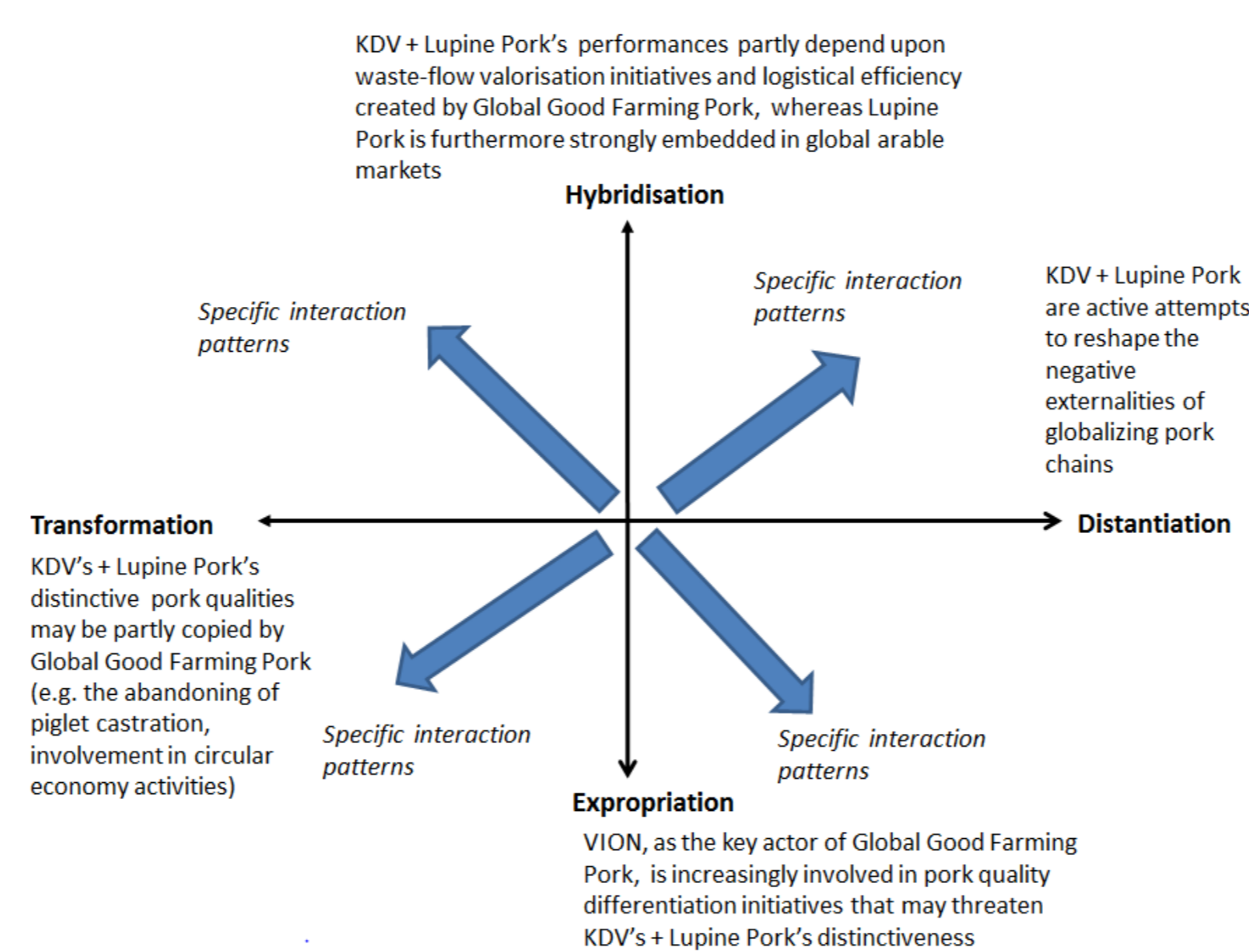
- Less affordable and accessibility
- Part of wider farm-based added value creation
- Better environmental performances, especially through strong interlinkages between local sourcing and energy production by bio-digester (less water, land and green house gas emissions per kg carcass)
- Better animal welfare + biodiversity performances
- More territorial distinctiveness potentials (?)
- In search for resilience through traditional and novel interrelations between pork production and waste-valorisation.

Research-methods & Data-collection

- LCA analysis
- Stakeholder analysis
- Secondary data and broad range of data-sources
- Supplementary interviews
- Feedback on preliminary results

The Step from attributes to indicators

- Added Value**
- VION's Financial Results over last 5 years;
 - Producer prices off-slaughterhouse over the period 1996-2011;
 - Producer prices off-farm over the period 1996-2011;
 - Price-index fodder over the period 1996-2011;
 - Loss of gross Value national pork sector over the period 2010-2012;
 - The (contested nature of) Added Value distribution among Chain Partners;
 - Farm-level rate of return on investments over the period 2008-2012;
 - Average income out of pork production versus off-farm income in the period 2008-2012;
 - The value of by-products as % of overall pig valorisation
 - 'Extra' production costs of: 1) impact on climatic change; 2) animal diseases; 3) animal welfare; 4) public subsidies;
 - Producers' ability to create extra value added at the level of primary production;
- Affordability**
- National Pork consumer price-index over the period 1996-2011;
 - National Pork consumption over the period 1995-2011;
 - National Pork consumption over the period 2000-2012 compared to the consumption of poultry, beef and other meat categories;
 - National pork consumption compared to other European MS;
 - National Pork price-levels compared to other European MS;
 - Retailers tendency to stunt with pork prices ('Pound Bangers');
 - National Tendency towards higher quality and less frequent meat consumption among consumers;



Methodological complexity of local versus global pork chain comparison:

- To be approached as relative and relational notions
- To be complemented with more horizontal (place based) and circular approaches for inclusive performance profiles

