BRIEFING · FOOD LIFE-CYCLE SERIES · THE PORK LIFE CYCLE

# More pigs, lower prices, fewer contracts

Northern Ireland's pig herd grew to June 2025, but prices have fallen since and the kill is shrinking. A falling price, the larger of NI's two processors cutting contracts and a disease at Europe's door decide whether NI keeps independent pig farms. Northern Ireland does have the advantages to keep them: whole-carcase value, EU market access and a strong curing tradition.

IN SUMMARY

- The herd grew, the margin has gone. NI had 744,858 pigs in June 2025, up 8%, and a breeding herd of 61,795, up 10% on DAERA's census, though industry data suggest a fall and the NI kill has fallen for four quarters running. GB pig farmers lost about £25 a pig from July to September 2026, up from about £20 from April to June (AHDB). The NI clean pig price was 178.63p/kg in mid-November 2026, down 10.9% on a year (DAERA). There is no published NI cost of production; with NI feed mostly imported, *my assessment is that NI margins are unlikely to be better*.
- Processing sits in very few hands. Sofina Foods (Cookstown, formerly Karro) and Cranswick (Cullybackey) do the bulk of the kill. Sofina confirmed in June 2026 that a "small number" of NI supply contracts will not be renewed at the end of 2026. The Irish Farmers Journal reports an aim to cut about 3,000 pigs a week. The Ulster Farmers' Union has taken the issue to the Minister and to Tesco. A 2025 UK law on written pig contracts also applies in NI.
- The fifth quarter pays. Offal was 48% of UK pig meat and offal exports by volume in 2025, most of it to markets outside the EU. Feet, ears and stomachs that UK shoppers will not buy make the carcase pay.
- NI already works to stricter rules. From 9 October 2025, lower EU nitrite limits for cured meat began to apply in NI but not GB, with some categories phased in to 2027. NI curers must meet them; GB curers need not, *although many may already work below them*.
- African swine fever is the largest single risk. It reached Spain, the EU's largest pork producer, in November 2025. No ASF vaccine is authorised in the EU. It has never been recorded in the UK or Ireland. The UK rates entry through carried pork products as high (May 2026).

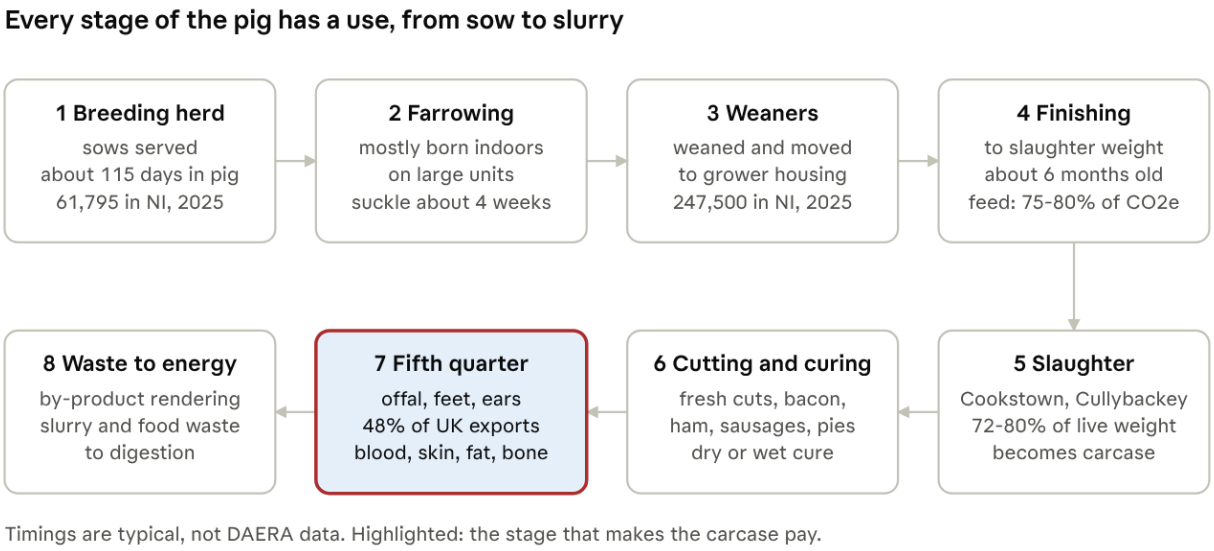
## 1. Key figures

| Measure | Figure | Period | Source |
|---|---|---|---|
| Pigs in NI | 744,858 (up 8%) | June 2025 | DAERA/NISRA census, 11 Dec 2025 |
| Breeding herd, NI | 61,795 (up 10% on the census; industry data suggest a fall) | June 2025 | DAERA/NISRA census, as above |
| Weaners and growers, NI | 247,500 (up 10%) | June 2025 | DAERA/NISRA census, as above |
| Share of breeding sows on units over 200 sows | 80% (13% of herds) | June 2025 | DAERA/NISRA census, as above |
| Pig output value, NI | £294m (down 1%; price down 3%, volume up 2%) | 2025 | DAERA agricultural incomes 2025, 20 Aug 2026 |
| NI finished clean pig price | 178.63p/kg deadweight, unchanged on the week, down 10.9% on a year | week ending 14 Nov 2026 | DAERA Agricultural Market Report, Vol. 89 No. 45, 19 Nov 2026 |
| NI clean pig slaughterings | 37,800 a week (2,900 fewer than a year earlier) | week ending 14 Nov 2026 | AHDB pork markets (AHDB and DAERA data), checked 21 Nov 2026 |
| Republic of Ireland pigs killed in NI | about 8,000 a week, over 20% of the kill | 2026 to June | Irish Farmers Journal, 10 Jun 2026 |

| Measure | Figure | Period | Source |
|---|---|---|---|
| GB Standard Pig Price (EU spec) | 176.12p/kg, down 2.43p on the week and 24.18p on a year | week ending 14 Nov 2026 | AHDB pork markets, checked 21 Nov 2026 |
| Average margin per slaughter pig, GB | −£24.95 (−27.4p/kg), against a cost of production of 207p/kg | Q3 2026 (Q2: −£20.44) | AHDB Q3 2026 cost of production, 9 Nov 2026 |
| UK pork self-sufficiency | 60.6% | 2025 | AHDB 2025 market summary |
| UK pig meat imports / exports (excluding offal) | 735,226 t / 158,998 t | 2025 | AHDB, as above |
| UK pig offal exports | 147,182 t; offal is 48% of pig meat and offal exports by volume | 2025 | AHDB, as above |
| Agriculture's share of NI emissions | 31.4% of net emissions (5.8 of 18.4 MtCO2e) | 2024 | NISRA, 9 Jun 2026 |

The SPP and margin figures are for Great Britain. NI clean pig prices are published weekly in DAERA's Agricultural Market Report, but not on the same basis as the SPP, so the two should not be compared point for point. *Prices checked 21 November 2026: DAERA report of 19 November and AHDB week ending 14 November.*

## 2. The life cycle




The pig life cycle in NI. Drawing: Robert J. Park.

A sow is served, carries her litter for about 115 days and suckles it for about four weeks. The weaners are grown and finished to slaughter weight at about six months. Cull sows leave the herd for sausage and manufacturing meat. After slaughter, the carcase is cut and cured, and the fifth quarter is sold, much of it abroad. What is left, with slurry from every stage on the farm, goes to rendering or anaerobic digestion. A smaller breeding herd means fewer pigs at every later stage, so contract cuts at Cookstown feed straight back to the sow. *Timings are typical, not DAERA data.*

# 3. What has changed

## The herd

NI pig numbers rose 8% to 744,858 in the year to June 2025, and the breeding herd rose 10% to 61,795 (DAERA/NISRA, 11 Dec 2025). Pigs are concentrated: about 2% of NI farms keep them, and units of more than 200 sows hold 80% of breeding sows. The census is contested. Slaughter points to a fall: the NI clean pig kill dropped 5.2% in Q3 2026, its fourth quarterly fall in a row (AHDB, 5 Nov 2026). Industry data reported by AHDB showed NI breeding numbers *down* about 5% over the same period (FarmingUK). *The June 2026 census, due in December 2026, should settle it.*

## Processors and contracts

The Cookstown plant, once the largest single pig slaughter site in the UK and Ireland, is now run by Sofina Foods, formerly Karro Food Group (DAERA PPC permit notice, 27 May 2026). Cranswick runs the Cullybackey plant near Ballymena.

Early in 2026, smaller suppliers and producer groups were told their Cookstown contracts would end at the end of the year (Irish Farmers Journal). Sofina has confirmed a "small number" of NI contracts will not be renewed, citing downward pressure on the market (Agriland). The aim reported is a cut of about 3,000 pigs a week. The UFU has asked for written answers on how many producers are affected and on what criteria (FarmingUK). It has also sought a meeting with Minister Andrew Muir (Agriland) and put producers' concerns directly to Tesco (Agriland). *The Irish Farmers Journal reports two NI producer groups, about 40 suppliers between them, and one independent producer are affected (10 Jun 2026). Tesco said it would follow up with Sofina.*

The processors' case should be stated fairly. GB and NI have had a surplus of pigs through 2026: AHDB reports industry warnings that about 10,000 pigs a week may lack slaughter space into Christmas. EU pork has been far cheaper than UK pork, and Sofina has cited pressure from lower-cost European pork and changing demand (FarmingUK). The question NI farmers ask in return is why Republic of Ireland pigs, over 20% of the NI kill, keep their places while local contracts end. Neither side has published the numbers that would answer it.

## Contracts and the law

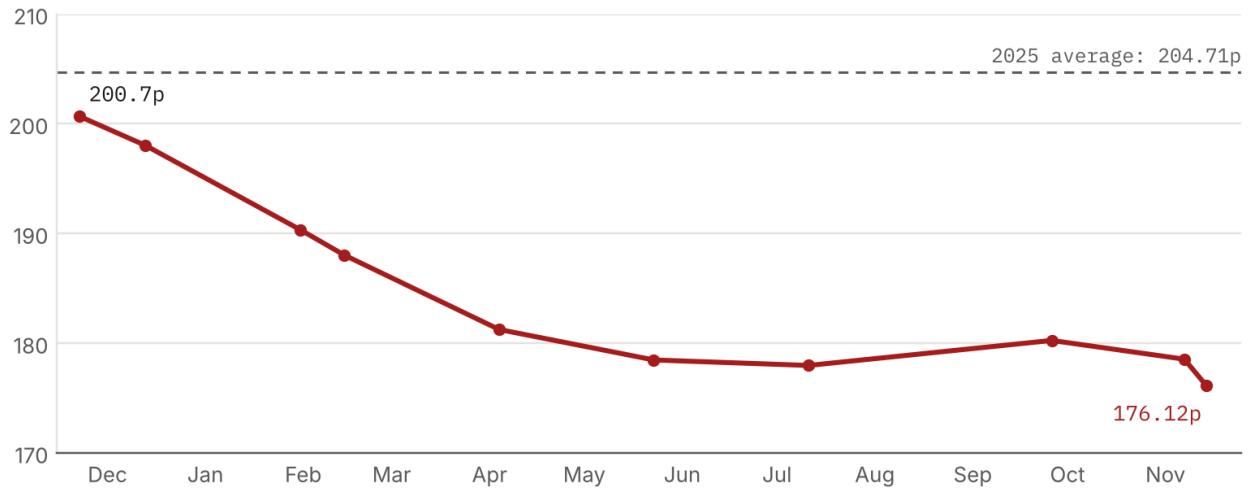
The Fair Dealing Obligations (Pigs) Regulations 2025 extend to Northern Ireland (SI 2025/610, regulation 1). They require written contracts for buying pigs and set rules on pricing, notice and changing terms. They came into force on 13 August 2025, and all contracts, new and existing, had to comply by 13 August 2026 (Defra). Defra says the Agricultural Supply Chain Adjudicator enforces them, with fines of up to 1% of the buyer's turnover. *Who enforces them in NI, and whether non-renewal, as opposed to termination, is covered, need checking and a lawyer's reading. This is not legal advice.*

If your contract is ending. Check what your written contract says about notice and renewal; keep every letter and email; talk to the Ulster Farmers' Union; and take a solicitor's advice before signing anything new or accepting the end of the contract. Ask the buyer in writing for the criteria it used. *General information, not legal advice.*

## Prices

Pig prices have been falling since the 2023 peak. In NI, DAERA's finished clean pig price was 178.63p/kg deadweight in the week ending 14 November 2026, unchanged on the week and down 10.9% on a year (DAERA, 19 Nov 2026). The GB Standard Pig Price fell 2.43p to 176.12p/kg in the same week, 24.18p below a year earlier (AHDB); a brief rise in early November, to 178.54p/kg, did not hold. The squeeze comes from both sides. AHDB puts the full economic cost of production at 207p/kg deadweight in Q3 2026, up 6p on the quarter, while the SPP averaged 180p; the loss was £24.95 a pig, against £20.44 in Q2 (AHDB, 9 Nov 2026). AHDB forecasts the UK sow herd to fall 0.9% to 328,000 by June 2027 and 1.5% further to 323,000 by June 2028, and reports industry warnings that about 10,000 pigs a week may lack slaughter space into Christmas (AHDB outlook, Oct 2026). UK production growth eased in Q3 2026, with September output slightly below a year earlier. Sow and boar slaughter reached 56,000 head in Q3, up 15.4% on a year, as producers cut breeding herds, and the NI clean pig kill fell 5.2% (AHDB, 5 Nov 2026).

## GB pig price fell nearly 25p a kilo in a year




GB Standard Pig Price, EU spec, pence per kg deadweight, selected weeks, November 2025 to 14 November 2026. Source: AHDB weekly SPP reports and pork markets page; Farmers Weekly for the week ending 22 November 2025. Vertical scale does not start at zero.

The chart shows the GB price only, for selected weeks. Its axis starts at 170p, not zero, to show the change. Every week shown sits below the 2025 average. *Latest week: 14 November 2026 (AHDB, checked 21 Nov 2026).*

### Trade

The UK imported 735,226 tonnes of pig meat in 2025 and exported 158,998 tonnes, about 61% self-sufficient (AHDB). Offal exports were 147,182 tonnes, against 17,248 tonnes imported. Most offal exports went to markets outside the EU. The gap between UK and EU pig prices averaged 50.3p/kg from January to June 2026, against 36.7p a year earlier (AHDB outlook, Oct 2026), and puts a ceiling on any recovery. In Porkwatch, 88% of fresh pork facings in surveyed supermarkets were British (AHDB, 29 Oct 2026).

### Disease

African swine fever was confirmed in wild boar near Barcelona on 27–28 November 2025, Spain's first case since 1994. About a third of Spanish pork export certificates were blocked within days (Reuters via bdnews24). Between January and September 2026, 7,455 outbreaks were reported in Europe, 733 of them in domestic pigs (not rechecked) (ADIS via 3tres3). The UK Government rates the risk of entry through people carrying pork products as high, and published a new African and classical swine fever control strategy for Great Britain on 14 May 2026 (GOV.UK). Northern Ireland is covered by DAERA's own contingency plan (DAERA, African swine fever). ASF has never been recorded in the UK or Ireland. No vaccine against it is authorised in the EU; an EU regulation of May 2026 sets conditions for future use and records that no effective and safe vaccine is available (Delegated Regulation (EU) 2026/1073, 13 May 2026). Feeding catering waste to pigs has been illegal in NI since 2001. The practical defences are the same on every farm: no pork products on site or in feed, strict control of visitors and vehicles, and early reporting of sick pigs to the vet and DAERA.

### Rules

Lower EU limits on nitrites in meat products apply in NI but not GB, phased in from 9 October 2025. Added nitrite falls to 80 mg/kg for most meat products (was 150) and 55 mg/kg for sterilised products; traditionally cured products such as Wiltshire and dry-cured bacon have a residual limit of 105 mg/kg instead (Regulation (EU) 2023/2108; safefood). *Some categories phase in to 2027; check the Annex for the date that applies to each product.*

### Carbon and phosphorus

British pork's carbon footprint per kilo fell 18% between 2008 and 2023 (AHDB Pork Environmental Roadmap, April 2026). Feed is 75–80% of a pig farm's footprint. In NI, phosphorus is the sharper problem: 61% of NI pigs are kept in the Lough Neagh catchment, and pig manure output rose 48% between 2012 and 2025, according to Friends of the Earth NI and Materiality (Agriland, 16 Jul 2026; *campaign analysis, not official statistics*).

DAERA's own proposals go further than any campaign figure. The draft regulatory impact assessment for the Nutrients Action Programme 2027–2030 (24 Jun 2026) proposes:

- sector rules for pig and poultry farms over 170 kg of nitrogen per hectare;
- phosphorus protocols covering 594 farms outside the IPPC permit regime;
- low-emission slurry spreading for pig farms producing over 10,000 kg of manure nitrogen, from 1 February 2029;
- tighter tracking of manure movements;
- a 30% cut in the national phosphorus surplus.

(DAERA RIA). *Draft proposals, still to be consulted on. Ammonia from pig units, and its role in planning decisions on new units, is not covered here.*

### Welfare and the case against

Most NI pigs are reared indoors on large units, which is where the efficiency and the carbon gains come from. Critics point to farrowing crates, tail docking and barren housing. *NI law allows tail docking only where other measures have failed (Welfare of Farmed Animals Regulations (NI) 2012).* Farm animal welfare in NI is governed by the Welfare of Farmed Animals Regulations (NI) 2012. The UK Government is consulting on phasing out CO2 stunning at slaughter (AHDB Pork Sector Council, 29 Oct 2026). *Welfare at slaughter is devolved; whether the consultation extends to NI, and which systems the NI plants use, is not confirmed.* AFBI's 2026 outdoor trial shows a different system can work here (next section). *NI figures on crate use and tail docking not found.*

## 4. Land, feed and the whole animal

- Land. Pigs use little land directly. Their footprint sits in the cereal and soya fields that feed them, much of it outside NI, and in the land their slurry is spread on. In NI that land is concentrated in the Lough Neagh catchment.
- Feed. Feed is the largest cost of pig production in GB (AHDB cost-of-production series) and 75–80% of a pig farm's carbon footprint (Queen's University Belfast study, reported by Pig World, 2021). Imported soya carries land-use emissions that fall in producer countries' inventories, not NI's. *An NI split of soya into pig rations has not been found; DAERA's compound feed statistics may allow an estimate.*
- Yield. Only 72–80% of a pig's live weight becomes carcase (AHDB). The rest is where whole-animal value is won or lost.
- The fifth quarter. Feet, ears, stomachs and other offal go mainly to Asian markets. Blood becomes black pudding or blood meal; skin becomes crackling, scratchings or gelatine; back and leaf fat become lard.
- Bones. Bones make stock, broth and the jelly in a pork pie, and are processed into edible gelatine and collagen when handled as food from the start (FSA, edible co-products). Otherwise they go to Category 3 rendering for fat, protein meal and pet food.
- The legal routes. Every part not eaten is sorted into one of three categories under Regulation (EC) 1069/2009, enforced in NI by the Animal By-Products (Enforcement) Regulations (NI) 2015. The category sets what each part can become: food, feed, fertiliser, fuel or ash.
- Slurry. Slurry is spread on land or processed by anaerobic digestion. Digestion produces biomethane and lets phosphorus be separated and moved out of the catchment.
- The closed route. Food waste cannot be fed back to pigs. The swill ban followed the 2001 foot-and-mouth outbreak, which was traced to pigs fed contaminated waste (DAERA). With ASF in Europe, any case for a licensed, heat-treated return has to start with disease control.

## 5. Local feeds and slurry to gas

NI pigs are fed mainly on imported cereals and soya. Local feeds and local slurry processing could cut both the carbon footprint and the phosphorus load. Some of this is already happening; acorns and Armagh apples are not yet part of it.

### Acorns and woodland

No commercial acorn-fed pig herd was found in NI. In England, pigs are turned out into the New Forest each autumn to eat fallen acorns, an ancient right called pannage (Forestry England). Pigs tolerate acorns that poison ponies and cattle. New Forest Pannage Ham has had UK protected status since February 2023 (GOV.UK).

AFBI has shown that outdoor and woodland pig rearing works in NI's climate (AFBI, 21 Apr 2026). In an eight-month trial at Loughgall, Co. Armagh, outdoor pigs grew at 1.01 kg a day, comparable with the top 10% of UK indoor finishing herds. They spent 68% of the day outside. Pigs under trees gained 7% more weight than pigs on grass, and only 9% showed sunburn against 58% on grass. The study does not name the tree species.

### Armagh Bramley apples

No NI pig unit fed on Armagh Bramley apples or pomace was found. The Armagh Bramley Apple is a protected name (GOV.UK specification). Its juice, cider and processing industry leaves pomace, the pulp after pressing. Pomace is a traditional livestock feed but spoils quickly, so it is used close to the press (FAO Feedipedia). Trials abroad have fed apple pomace flour at up to 15% of growing pigs' compound feed in place of grain without loss of meat quality (AGRIS, 2024). An Armagh orchard-and-pig pilot, with AFBI at Loughgall in the same county, is an open idea. *Feed-business registration and pesticide residues in culled apples would need checking.*

### Co-products already in use

NI's food and drink industry produces co-products that pigs can eat, and liquid feeding systems are built to use them. AFBI, JMW Farms and Rektify found that lactating sows and growing pigs can take 10% whey permeate in their diet, and gestating sows up to 50% co-product, without harm to performance (AFBI). Other options include brewers' and distillers' grains and bakery former foodstuffs with no meat in them. Co-products fed to pigs must be certified under the Feed Materials Assurance Scheme (Farmers Weekly). Diets high in by-products can lower the killing-out percentage and soften the fat (AFBI, 1997). That matters for curing. Locally grown peas, beans and rapeseed meal can replace some imported soya.

*Analysis: a co-product's carbon is mostly counted against the food it came from, and it brings in no new imported phosphorus from abroad. The phosphorus already in the NI food chain is recycled through the pig instead. Both points need a proper life-cycle check before they are quoted as figures.*

### Local feeds compared

| Feed | Where it comes from in NI | How much pigs can take | Soil and carbon | Use in NI pigs now | Source |
|---|---|---|---|---|---|
| Whey permeate | Cheese and dairy processors | 10% of diet for lactating sows and growers; 20% cut intake | Co-product; no extra land | In use in liquid feeding | AFBI |
| Mixed food and drink co-products | Food and drink manufacturers | Up to 50% of diet for gestating sows; high fibre can cut later intake | Co-product; no extra land | In use in liquid feeding | AFBI |
| Brewers' and distillers' grains | Breweries and distilleries | Used as a co-product feed; NI inclusion rates not found | Co-product; no extra land | *Not confirmed for NI pigs* | Farmers Weekly |
| Bakery former foodstuffs | Bakeries and food factories (no meat or fish) | Part of cereal energy; must be certified feed | Keeps food out of waste; no extra land | *Not confirmed for NI pigs* | Farmers Weekly, as above |

| Feed | Where it comes from in NI | How much pigs can take | Soil and carbon | Use in NI pigs now | Source |
|---|---|---|---|---|---|
| Apple pomace (Armagh Bramley) | Armagh juice, cider and apple processors | Up to 15% of grower compound feed in trials abroad | Uses a waste stream; spoils within days | Not found | Feedipedia; AGRIS |
| Acorns and woodland forage | NI oak woodland, seasonal | Supplement only, in autumn | Woodland grazing; trees shade pigs | Not found commercially; AFBI woodland trial 2026 | Forestry England; AFBI |
| Home-grown peas, beans, rapeseed meal | NI arable farms | Replaces part of the soya | No imported land use; legumes fix their own nitrogen | *NI area and use in pig feed not found* | *General knowledge; check AFBI* |
| Imported soya meal (for comparison) | South America, via Belfast port | Main protein source today | Land-use emissions abroad; brings in phosphorus | Main protein in compound feed | DAERA compound feed statistics |

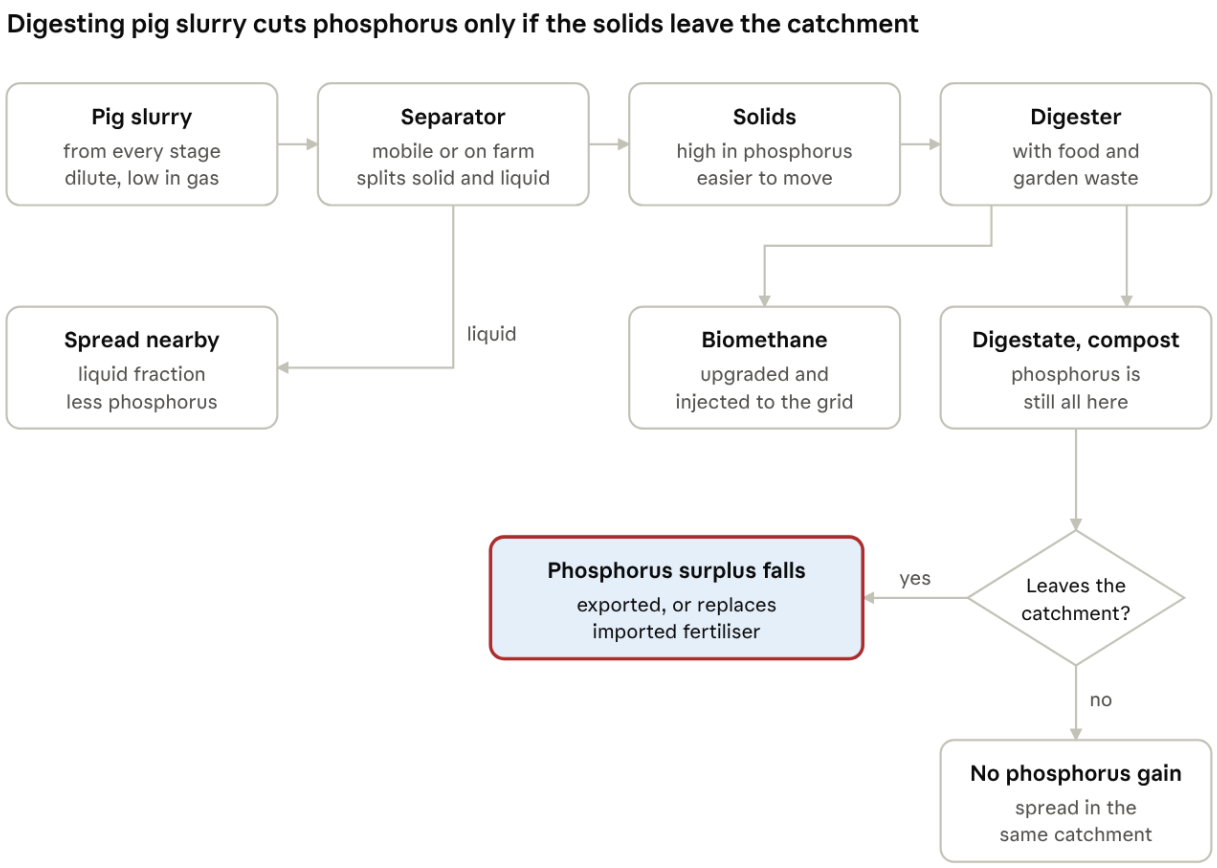
Rows in italics are not yet checked against a primary source.

## Slurry to biomethane

The joint DfE and DAERA consultation on a Biomethane Strategy and Policy Framework runs from 20 October to 15 December 2026 (Arthur Cox, 22 Oct 2026). The Assembly's research service counts between 60 and 132 anaerobic digestion plants in NI, and no central public dataset exists (NI Assembly RaISe, 16 Mar 2026). The gas companies aim to inject 1.5 TWh of biomethane a year by 2030; production costs are estimated at 7–12p/kWh, against about 2.5p for natural gas. The first injection into the NI grid was at Dungannon in November 2023.

Pig slurry is part of the plan, but only if the phosphorus goes somewhere useful.

- DAERA's Sustainable Utilisation of Livestock Slurry programme has made three £4m awards, about £12m in all, with projects running to October 2028. It aims to cut excess phosphorus by at least 1,000 tonnes a year (DAERA, 19 Feb 2026).
- Natural World Products, at Glenside, Dunmurry, will build NI's first high-solids digester. It will trial cattle and pig slurry solids mixed with food and garden waste, making biomethane and peat-free compost. Mobile separators will take phosphorus-rich solids off farms.
- Anaerobic digestion does not remove phosphorus. Digestate spread in the same catchment adds to the surplus. The gain comes only when separated solids, compost or fertiliser leave the catchment or replace imported fertiliser (RaISe, as above).
- *Pig slurry is dilute and yields less gas per tonne than cattle slurry solids or food waste; separation or co-digestion improves it. Check yields against AFBI data before quoting figures.*




Pig slurry to biomethane: the phosphorus test. Drawing: Robert J. Park.

Gas is made either way; the phosphorus only goes down if the separated solids, compost or fertiliser leave the Lough Neagh catchment or replace imported fertiliser.

For the Biomethane Strategy consultation, the pig case is simple: fund separation and phosphorus export alongside gas, or the gas gain comes at Lough Neagh's expense.

## 6. Vets, vaccines and flu

The farm vet is the pig sector's first line of defence. They write the herd health plan, prescribe vaccines and medicines, and are the first to see a new disease. In NI the vet's toolkit changed on 1 January 2026, and pig flu is changing faster than the vaccines.

### Medicines in NI since January 2026

The grace period for moving veterinary medicines from GB into NI ended on 31 December 2025. From 1 January 2026, Windsor Framework rules apply in full (GOV.UK). Medicines supplied from GB must come from a holder of a Windsor Framework manufacturing authorisation. Products authorised in NI and imported from the EU are not affected (GOV.UK). Two schemes fill gaps: the Veterinary Medicines Internal Market Scheme and the Veterinary Medicines Health Situation Scheme, which lets vets use alternative products where animal or public health requires it (GOV.UK). Vets warned MPs that about 10% of the medicines used in NI could become unavailable, down from an earlier estimate of half (PA, via Tipperary Live). *Which pig products, if any, have been lost in 2026 is not yet published.*

NI and GB pig vaccines carry separate authorisations. The VMD database lists each swine flu vaccine twice: an EU authorisation for NI and a VMD authorisation for GB (VMD).

## Swine flu vaccines

Two swine influenza vaccines are authorised for pigs in NI and GB, both prescription-only (POM-V):

| Vaccine | Protects against | Use | Source |
|---|---|---|---|
| Respiporc FLU3 | H1N1, H3N2 and H1N2 swine influenza | Pigs from 56 days, including pregnant sows; zero-day withdrawal period | VMD leaflet, rev. Feb 2025 |
| Respiporc FLUpan H1N1 | The 2009 pandemic H1N1 strain | Pigs from eight weeks | E*U veterinary medicines product record* |

The supplier advises using the two together for the strains most relevant in the British Isles (Pig World).

## Pig flu is changing

- Swine flu is notifiable in NI, not in GB. DAERA lists Influenza A infection in pigs as a notifiable disease in NI (DAERA) and describes swine flu as endemic (DAERA). In GB it is non-notifiable and non-reportable, but APHA monitors it for its effect on production and its potential to spread to people and cause a pandemic (APHA, Oct–Dec 2025 report). Government-funded testing at APHA depends on vets submitting swabs from pigs with respiratory disease (GOV.UK).
- A strain unseen since 1997 is back. In December 2025, H3N2 swine influenza was found in a Yorkshire breeding herd, the first in GB pigs since 1997. Pigs may have little immunity to it, and its H3 gene clusters apart from the H3 in the European-licensed vaccine (APHA, as above). *The herd's vet reported it to APHA in January 2026. APHA says its H3 gene clusters closer to 2023 human seasonal flu strains, which suggests it came from people. How well Respiporc FLU3 protects against it is not yet known.*
- Pig flu has reached a person here. In November 2023 UKHSA confirmed the UK's first human case of influenza A(H1N2)v, a virus very close to those circulating in UK pigs. The person, in North Yorkshire, had a mild illness and recovered fully (UKHSA; rapid technical assessment, 11 Dec 2023). Pig keepers are told to report any suspicion of swine flu in their herds to their vet immediately.
- People working with pigs should follow the swine influenza code of practice, including its biosecurity steps (APHA, as above). *Check the Public Health Agency's current advice on seasonal flu vaccination for pig workers in NI.*
- Flu passes both ways. In April 2025 AFBI confirmed swine influenza on an NI farm, reported as the UK's first case of human-to-pig spread, and said it showed why surveillance matters (Farmers Guide; *press report, to be confirmed with AFBI*).

## Diseases with no vaccine

*No ASF vaccine is authorised in the EU (Delegated Regulation (EU) 2026/1073). Classical swine fever and foot-and-mouth disease are controlled without routine vaccination in the UK.* ASF control therefore rests on vets, biosecurity and early reporting, which is why vet capacity matters as much as vaccine supply.

## Vet capacity

NI's vets have asked DAERA for a livestock animal health and welfare strategy (Agriland). There have been warnings of too few vets for official meat inspection and export certification (MRCVS), and DAERA's Permanent Secretary told the Assembly Agriculture Committee in December 2025 that about 800 posts across the department were vacant and that recruiting and keeping vets was a challenge (Irish Farmers Journal). *Date of the meat-inspection warning to be confirmed.*

## What to ask for

- DAERA and AFBI: publish NI swine influenza surveillance results routinely, so NI vets know which strains are circulating here. Say whether NI pigs have been tested for the new H3N2.
- DAERA and the VMD: list any pig medicines or vaccines lost or at risk since 1 January 2026, and confirm swine flu vaccine supply under the Windsor Framework.
- The vaccine supplier, APHA and AFBI: report on vaccine match against the H3N2 strain found in December 2025.
- The Public Health Agency: publish clear flu advice for pig farm workers and vets.

## 7. The UK–EU deal: now and later

At the second UK–EU summit on 20 November 2026, both sides concluded negotiations on a sanitary and phytosanitary (SPS) agreement. The text is not published. It is intended to apply from 1 March 2028 and still needs signature, ratification and UK legislation (Cabinet Office, UK/EU Summit 2026 key documents).

| Issue | Now (Nov 2026) | After the SPS agreement (target 1 Mar 2028) | What it means for NI pork (analysis) |
|---|---|---|---|
| NI pork to ROI and EU | Moves freely under the Windsor Framework | Unchanged | No change to NI's existing access |
| ROI pigs into NI plants | Free movement within the EU SPS area; about 8,000 a week in 2026 | Unchanged | Cookstown's southern supply stays; NI producers keep competing with it |
| GB pork to ROI and EU | Export health certificates and border checks | Most certificates and routine checks removed | GB pork competes in the Republic and the EU on easier terms; NI's edge narrows |
| Meat, feed and inputs GB to NI | SPS controls under the Windsor Framework | Most certificates and routine checks go | Fewer checks on GB supplies; cost effect not yet known |
| Cured-meat rules (nitrites) | NI follows the lower EU limits; GB does not | GB aligns dynamically with EU rules | If additive rules are in scope (text not published), NI's edge fades and GB curers must reformulate |
| Swine fever controls | UK and EU each set their own rules and zones | A common SPS rulebook | *Check how regionalisation and trade restrictions would work in an outbreak* |

The last column is the author's analysis, not government guidance.

## 8. Six openings and the risks

### Openings

1. Phosphorus out, energy in. Process pig slurry by anaerobic digestion in the Lough Neagh catchment and export the separated phosphorus. This joins the Nutrients Action Programme, the Biomethane Strategy (consultation closes 15 December 2026) and NI's carbon budgets in one project.
2. Lower-carbon feed. Feed is 75–80% of the farm footprint. Locally grown protein, deforestation-free soya and lower-protein diets cut carbon, nitrogen and phosphorus together.
3. Carbon data for the supply chain. CBAM does not cover food, but retailers and processors are asking suppliers for Scope 3 data. A farm or curer with its own carbon inventory can answer that and use it in a sale.
4. An Ulster dry-cure name. Dry cure, no added water, made to the lower EU nitrite limits: the makings of a collective mark or a protected name. The Melton Mowbray pork pie (PGI, registered 2009) shows the route. A protected name rests on a link to a place, so the nitrite standard would be a selling point, not the basis of the name.
5. Native breeds and the farm-shop economy. Seven of the UK's 11 native pig breeds were in the RBST Priority category in 2024–25 (the 2025–26 list has since been published; check each breed) (NPA). Ireland has lost both of its own breeds. Slow-growing, outdoor rare-breed pork suits curing, farm shops and food tourism.
6. Whole-carcase value at home. Bones to broth and pie jelly, fat to lard, skin to crackling, offal to export, and the rest to energy. Councils can help through local food procurement and food-waste collection that feeds anaerobic digestion.

### Risks

- African swine fever reaching the UK or Ireland would halt exports overnight; Spain's outbreak shows how fast markets close.
- Losses per pig and the EU price discount may push independent farms out before prices recover.

- Two processors' contract decisions shape the whole sector; independent producers have little leverage, and the 2025 fair-dealing rules are untested.
- The SPS agreement could slip, and it helps GB competitors into the Republic and the EU as much as it helps NI.
- DAERA's draft Nutrients Action Programme 2027–2030 proposes sector rules for intensive pig farms and a 30% cut in the phosphorus surplus; units that cannot export manure nutrients will face rising costs.
- The health case against processed meat (IARC Group 1) could weigh on bacon and ham demand; AHDB already expects processed pork demand to fall.

## 9. What to ask for

Of DAERA

- Say what support or transition help is available to NI pig producers whose contracts end in 2026.
- Set out how pig manure processing and phosphorus export will be supported under the Nutrients Action Programme and the Biomethane Strategy.
- Say whether a pig-enterprise income figure from the Farm Business Survey is feasible, given the small number of pig farms sampled.
- Say whether native pig breeds will be eligible for support under the Farm Support and Development Programme.
- Report on African swine fever preparedness for NI, including all-island arrangements with the Department of Agriculture, Food and the Marine.

Of the processors and retailers

- Sofina and Cranswick: confirm how pig contracts comply with the Fair Dealing Obligations (Pigs) Regulations 2025, including notice and termination terms, and give written criteria for contract changes, as the UFU has asked. Say how many NI producers are affected.
- Retailers: back NI-origin pork on shelf and in own-label bacon and ham, and say how supply contracts protect independent family farms.
- Report the value of the fifth quarter (offal, blood, skin, bone) so its contribution to the carcase can be costed.

Of the industry and district councils

- Back an Ulster dry-cure producer group to test a collective mark or protected name.
- Mid Ulster, Causeway Coast and Glens and Armagh City, Banbridge and Craigavon councils could support pilots for rare-breed pork, whole-carcase butchery and food-waste anaerobic digestion from rural and economic development budgets.
- Farm and craft producers: build a simple carbon inventory now, ahead of retailer Scope 3 requests.

## 10. Sources and caveats

- Official and primary: DAERA/NISRA June Agricultural Census 2025 (11 Dec 2025); DAERA Northern Ireland agricultural incomes 2025 (20 Aug 2026); DAERA PPC permit notice, Sofina Foods Cookstown (27 May 2026); DAERA guidance on African swine fever and on catering waste; NISRA greenhouse gas inventory 1990–2024 (9 Jun 2026); Cabinet Office UK/EU Summit 2026 key documents (20 Nov 2026); GOV.UK swine fever strategy (14 May 2026); Regulation (EC) 1069/2009 and the Animal By-Products (Enforcement) Regulations (NI) 2015; Regulation (EU) 2023/2108; FSA Manual for Official Controls, edible co-products; AHDB pork market outlook (Oct 2026), market summary 2025, production update (5 Nov 2026), Porkwatch (29 Oct 2026), killing-out guidance and Pork Environmental Roadmap (Apr 2026); AHDB weekly SPP reports (Feb to Jul 2026); GOV.UK and VMD guidance on veterinary medicines in NI (2025–2026); VMD product database and Respiporc FLU3 leaflet (rev. Feb 2025); EMA summary for Respiporc FLUpan H1N1; APHA GB pig disease surveillance report, Oct–Dec 2025; UKHSA on influenza A(H1N2)v (Nov and Dec 2023); DAERA notifiable diseases list and swine influenza page; DAERA Agricultural Market Reports (2026); Fair Dealing Obligations (Pigs) Regulations 2025 (SI 2025/610); DAERA draft NAP 2027–2030 regulatory impact assessment (24 Jun 2026); Delegated Regulation (EU) 2026/1073; Welfare of Farmed Animals Regulations (NI) 2012; AFBI outdoor pig study (21 Apr 2026) and

liquid-feeding co-product research; DAERA SULS awards (19 Feb 2026); NI Assembly RaISe paper on anaerobic digestion (16 Mar 2026); Armagh Bramley Apple PGI specification.

- Press and other secondary sources (named in the text): Irish Farmers Journal, Agriland, FarmingUK and Farmers Weekly on Sofina contracts, prices and census reliability; Reuters (via bdnews24) and ADIS (via 3tres3) on ASF in Europe; safefood on nitrite limits; NPA on the RBST watchlist; Friends of the Earth NI and Materiality on Lough Neagh (campaign analysis); Pig World on the Queen's University Belfast feed study.
- Not yet known or checked: the number of NI producers affected by Sofina's contract changes; GB's position on the EU nitrite limits at the date of issue; the June 2026 census (due December 2026); how swine fever regionalisation will work under the SPS agreement; an NI split of soya in pig rations; current RBST categories for each pig breed; routine publication of AFBI swine influenza surveillance; vaccine match against the 2025 H3N2 strain; whether non-renewal is covered by the 2025 fair-dealing rules; the ADIS outbreak count; local feed rows marked in italics; pig slurry gas yields; Public Health Agency flu advice for pig workers; pig medicines lost in NI since January 2026; who enforces the fair-dealing rules in NI; nitrite transition dates by category; the GB 2025 SPP average. Prices were checked on 21 November 2026.

Reviewed on 21 November 2026 by two panels: a fact-check against primary sources, and a practitioner panel (producer, processor, DAERA policy, farm vet, sub-editor). Prices checked on 21 November 2026. Created with assistive technology including AI and re-checked against the official sources listed. General information, not legal, financial or veterinary advice.

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