

Pig Newsletter

December 2025



Welcome

Welcome to the December edition of the Teagasc Pig Newsletter.

This edition includes the Pig Sector: Annual Review and Outlook 2026 summary paper, which goes through the key developments over the past year and outlines the main factors expected to shape pig prices, costs and profitability in the year ahead.

We also include an article examining how variation in ingredient quality can affect the nutritional value of finished feed, even when diets are formulated to a fixed specification, and why this matters in practice.

This issue also features an article exploring pork's place in today's protein aware food environment, including how it compares nutritionally with other protein sources and the value it offers in terms of protein per euro.

Thank you all for your continued engagement with us throughout the year. We also wish you, your family and staff a very happy Christmas and a healthy and successful New Year, and we look forward to working with you again in 2026.

This edition:

- Pork: A Strong Contender in Protein Focused Diets
- Varying ingredient quality = varying diet quality
- Pig sector: Annual Review & Outlook 2026



PORK: A STRONG CONTENDER IN PROTEIN FOCUSED DIETS

Amy Quinn



As consumers become more conscious of their protein intake, pork is not always the obvious choice in a crowded protein landscape, despite being a versatile and cost-effective source. Modern pork is lean, nutrient dense and well suited to those looking to increase or maintain protein intake through everyday foods.

The high protein focus

Protein has become highly visible on supermarket shelves, with "high protein" labelling now appearing across a wide range of foods, including yoghurts, bars, pancakes, breads and ready meals. This reflects growing consumer awareness of the role of protein in supporting health and nutrition. Research consistently shows that higher protein intakes support feelings of fullness, recovery from physical activity, and the maintenance of muscle mass and strength. These benefits help explain the growing focus on protein among consumers, from physically active individuals to households seeking filling, practical meals and older adults aiming to maintain strength.

How much protein do we need?

Protein requirements vary across life stages and are often underestimated or not fully considered, particularly among teenagers (especially girls), physically active adults, women during perimenopause and menopause, and older adults.

Table 1 outlines approximate daily protein requirements across key life stages. While many people meet basic protein recommendations, intakes may still be lower than ideal for supporting muscle health in groups with higher needs.

Table 1. Approximate Daily Protein Requirements (g/day)*

Group	(g/day)
Children (4–8 years)	19
Children (9–13 years)	34
Teenagers	46–52
Adults	50–65
Active adults	75–110
Women (perimenopause/menopause)	70–90
Older adults (65+)	75–105

*Values shown are approximate intakes based on international guidance and typical body sizes; individual needs vary.

Irish consumption trends

Long-term consumption data show that meat choices in Ireland have shifted over time. CSO data shows that pork's share of total meat consumption fell from approximately 39% in 2015 to around 32% in 2023, while poultry's share increased steadily over the same period to approximately 47%.

This shift may reflect consumer perceptions of poultry as a lean or healthy protein option. From a nutritional perspective, however, lean pork is directly comparable to chicken in both protein content and leanness when you choose lean cuts.

Nutritional value

When cooked, lean pork provides similar protein levels to chicken, typically around 30–32g per 100g, depending on the cut and how it is cooked. This highlights how meaningfully pork can contribute to daily protein needs when included in everyday meals.

Alongside providing a similar protein content to chicken, pork also contributes important micronutrients. Compared with chicken, pork provides higher levels of thiamine (vitamin B1), along with meaningful amounts of vitamin B12, iron and zinc, supporting energy metabolism, immune function and muscle health. When lean cuts of pork are used the fat content between them is comparable.

Protein value for money

It is clear that consumers are more than ever thinking about protein and why it matters but they are also becoming more aware of food costs. Irish

food prices were about 7% higher in 2023 than in 2022 and have continued to rise, with prices around 4.5–5% higher in 2025 compared with 2024. Protein value for money is an area where pork really has an edge.

"Protein value for money is an area where pork really has an edge."

Table 2 compares similar pork and poultry products available in Irish supermarkets, showing the amount of protein provided per euro using values taken from product nutrition.

Additionally, while other meats are high quality sources of protein, larger pork cuts are particularly suited to delivering high protein, versatility and value across multiple meals. Loin, shoulder and leg cuts provide substantial amounts of protein across several servings and lend themselves well to batch cooking and family meals.

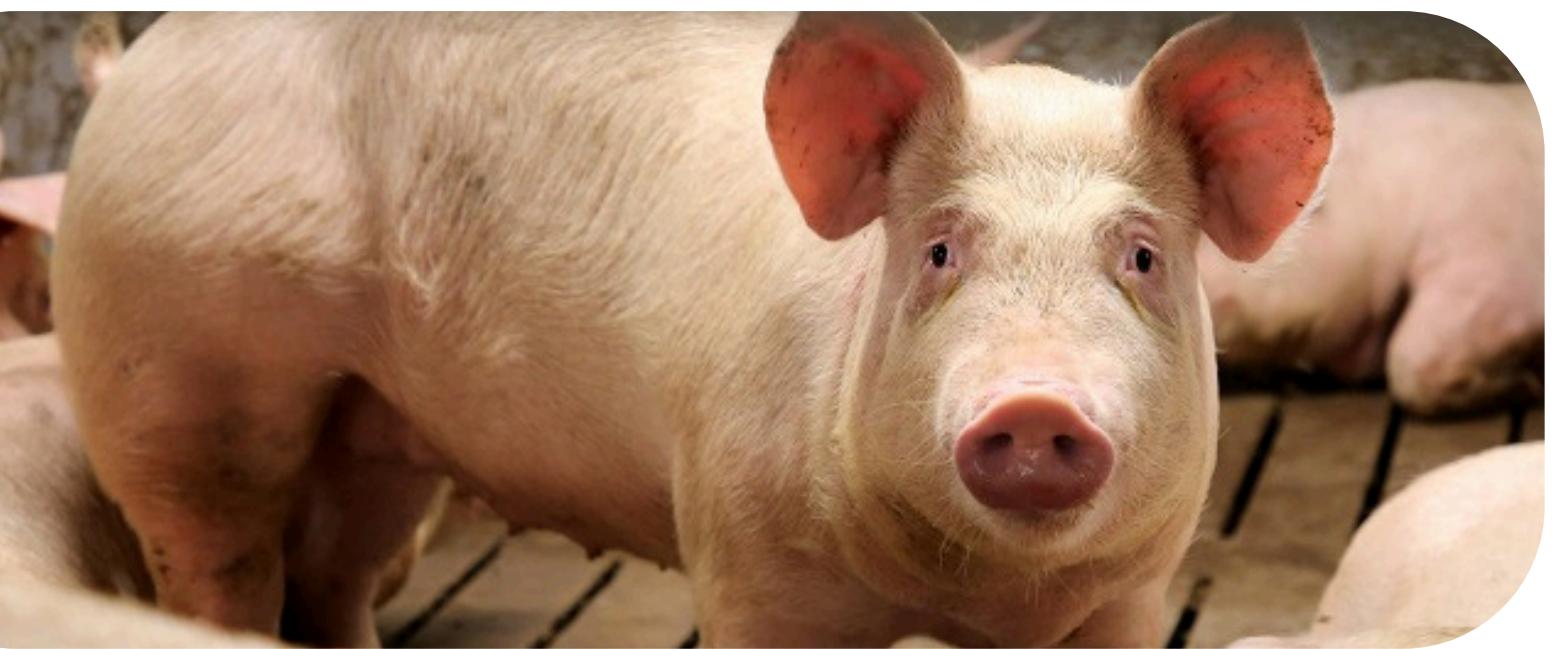
Conclusion

Protein now plays a central role in how many consumers think about food, with familiar whole foods, including meat, continuing to contribute strongly to protein intakes. Pork provides high quality protein, valuable micronutrients and good value, while fitting easily into everyday meals.

The question is how does pork keep its place on the table and grab a bigger slice of the protein conversation.

Table 2. Protein per Euro.

Category	Product (as sold)	Price €/kg	Protein (g/100g, label)	Protein per € (g)
Fresh cuts (raw)	Chicken breast fillets	€13.50	24	1.8
	Pork loin chops	€9.00	23	2.6
Mince (raw)	Turkey breast mince	€10.50	24	2.3
	Pork mince	€7.00	19	2.7
	Low-fat pork mince	€8.00	22	2.8
Sliced (cooked)	Chicken slices	€19.00	24	1.3
	Ham slices	€13.00	21	1.6



VARYING INGREDIENT QUALITY = VARYING DIET QUALITY

Kieran Keane



Pig diets are often assumed to be consistent once the formulation is set. In reality, the pig may be eating a very different diet from one batch to the next. Dietary crude protein will obviously vary with ingredient crude protein if the diet doesn't change accordingly. To illustrate this, we analysed the crude protein in samples of a finisher diet made over the last few months with the same recipe but varying ingredient quality. The feed samples were analysed using wet chemistry and results are shown on the graph below.

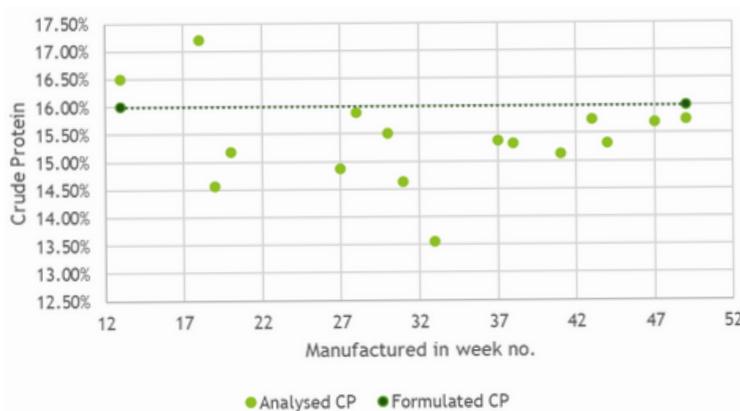


Figure 1: Crude Protein in Finisher Diet Samples 2025.

The diet is formulated to 16% crude protein and 1% SID-Lysine. Of the 16 samples the average CP is 15.4%. The lowest CP value was 13.6% and the highest 17.2%. This degree of variation is significant. A finisher diet testing at 13.6% crude protein is well below specification and will almost certainly limit performance if fed for any length of time.

Conversely, diets closer to or above 17% crude protein are likely oversupplying nitrogen, increasing feed costs and contributing unnecessarily to nitrogen excretion.

It is important to remember that crude protein is only a proxy measurement. What really matters to the pig is the supply of digestible amino acids, particularly lysine, methionine, threonine and tryptophan. However, large swings in crude protein usually indicate swings in amino acid supply as well. If the protein quality of incoming ingredients changes and formulations are not adjusted, the finished feed will inevitably drift away from the target.

In this case the diet was formulated to 1% SID-lysine. While synthetic amino acids help reduce variability, they cannot fully compensate for low crude protein if the base ingredients are significantly poorer than assumed. In the case of the 13.6% CP diet SID-lysine is about 0.9% rather than 1%. This would be lower still if the diet didn't already contain synthetic lysine. All other amino acids will be reduced in proportion, with a greater impact on those not supported by synthetic inclusion. This can lead to hidden deficiencies that show up as poorer growth rates or feed conversion.

From a practical perspective on farm, the impact of this variability can be difficult to spot immediately. A finisher pig fed a slightly under-spec diet may still grow, but growth rate will be slower and days to slaughter will increase. Feed efficiency can suffer, and carcass weights may be more variable. In periods of tight margins, even small reductions in performance can quickly erode profitability.

On the other hand, over-spec diets bring their own problems. Excess crude protein that is not utilised by the pig is broken down and excreted as nitrogen. This not only represents wasted feed cost, but also has environmental implications, particularly when nitrates regulations and ammonia emissions are under increasing scrutiny. Feeding closer to requirement, rather than above it "for safety", is becoming more important from both an economic and regulatory standpoint. While excessive safety margins increase cost and nitrogen output, too little margin can expose farms to performance losses when ingredient quality dips. The challenge is to strike the right balance. This balance may differ between units depending on health status, feed intake patterns and slaughter weight targets.

So, what can be done to manage this variability? The first step is awareness. Regular analysis of feed ingredients will help ensure formulations are representative of dietary outcome. Cereals and protein meals can vary considerably depending on origin, harvest conditions and storage. Using book values or outdated analyses increases the risk of error. See table below showing average CP of ingredient samples analysed from 2025 harvest against book values for same ingredients. Note that with Maize and Soya I have taken the average from samples in the last 4 months. Due to the geographical spread of origins, logistics and storage it's hard to determine which samples belong to which harvest year.

“In periods of tight margins, even small reductions in performance can quickly erode profitability”

Table 1: Average Crude Protein from Book values and 2025 harvest.

	Crude Protein	
	Book value	2025 Harvest
Barley	10.08%	10.00%
Wheat	10.50%	9.91%
Soya	47.20%	46.22%
Maize	8.15%	7.29%

Testing of finished feed, as shown here, provides valuable information on how closely diets are matching formulation targets. As ever communication between the feed supplier, nutritionist and farmer is essential. If ingredient sources change, or if there are known issues with raw material quality, this information should be shared. Likewise, if farmers notice unexplained changes in performance, feed analysis should be one of the first checks carried out.

In conclusion, the variation seen in crude protein levels in these finisher diets highlights a real and often underestimated issue in pig production. With a fixed recipe, changes in ingredient quality can lead to large differences in the nutritional value of the finished feed. For Irish pig farmers operating in a highly cost-sensitive and regulated environment, managing this variability is key to maintaining performance, profitability and environmental compliance. Regular feed analysis, up-to-date ingredient values and close collaboration with nutrition providers are essential tools in achieving this.

Looking towards 2026 we are looking to build a more thorough picture of ingredient variability around the country. So, we are looking for a small number of pig producers to contribute samples to the lab. The focus will be on specific geographical regions and on farms that can provide regular samples over time, along with basic background information on sourcing and storage. If on reading this, you think it's something you could commit to please contact me on 086-2646926 or via email Kieran.keane@teagasc.ie



PIG SECTOR: ANNUAL REVIEW & OUTLOOK 2026



Michael McKeon

After severe losses in 2022—caused mainly by the Ukraine war's impact on feed and energy costs—the Irish pig industry returned to profitability in 2023. This recovery continued through 2024 and most of 2025, although margins tightened towards year end. The following summarises key developments in 2025 and the outlook for 2026.

Pig Production Costs 2025

Feed accounts for 75% of Irish pig production costs. In 2025, composite feed prices began the year high due to lingering effects of global commodity disruptions but gradually decreased. Feed cost fell from 130c/kg dwt in January to 124c/kg by December, giving an annual average of 128c/kg. The annualised composite feed price was €366/t—down 3% from 2024, though still 9% above 2021 pre-war levels and among the highest in 40 years.

Non-feed costs (25% of cost) rose by 14% relative to the 5-year average, driven mainly by higher healthcare, labour and management expenses. Energy costs continued to fall as markets stabilised. Financial costs—interest and depreciation—remained relatively low, reflecting a long-term underinvestment in buildings, which may impair efficiency and sustainability in the future.

Combining feed, non-feed, and financial costs, the estimated total cost of production for 2025 was 189.9c/kg dwt, slightly below 2024.

Pig Prices in 2025

The estimated average pig price for 2025 was

207c/kg, below the record 2023 level (224c/kg) but still well above long-term averages. Prices peaked mid-year at 228c/kg before declining sharply due to increased global competition and Chinese tariffs on European pigmeat.

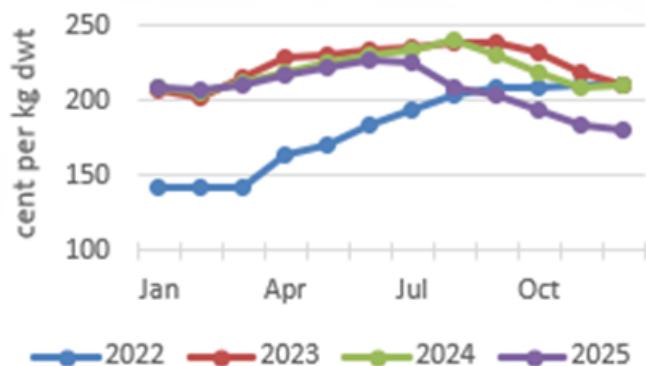


Figure 1: Monthly Irish Pig Prices 2022 – 2025. Source: Teagasc Pig Development Department, estimate for 2025

Ireland followed a similar price trend to other major EU producers. While high by historic standards, late-year price reductions reduced overall profitability.

Profitability & Margin-Over-Feed (MOF) 2025

The MOF—pig price minus feed cost—was 79c/kg in 2025. Although below the exceptionally strong 2024 figure (86c/kg), it remained far higher than the long-term 5- and 10-year averages (60c and 56c/kg). Since a MOF of 61c/kg is generally required to cover all costs, 2025 delivered moderate profits.

The recovery that began in April 2023 continued through most of 2025, helping farms rebuild financial stability after prolonged losses in 2022.

Sow & Pig Numbers 2025

Ireland's sow herd fell sharply in 2022 due to poor profitability but began recovering in 2024–2025. By end-2025, sow numbers are estimated at 138,000—up 3% on 2023 but still below 2021 levels. Pig disposals are forecast at 3.69 million head in 2025, up 5.4% on 2024 but 7% below the 2021 peak. Slaughter weights continued to rise, supporting overall output. Live exports of pigs to Northern Ireland have increased to an estimated 12% of national production in 2025—partly due to attractive contract arrangements. Total pigmeat output for 2025 is forecast at 342,000 tonnes, up from 2024 as sow numbers stabilised and sale weights increased.

The EU sow herd continued its multi-year contraction, declining 3% year-on-year. Since 2020, it has fallen by roughly 10%. The largest reductions in 2025 occurred in Spain, Netherlands, Poland and Belgium, driven by disease challenges, cost pressures and stricter environmental legislation. Germany's sow herd has shrunk dramatically over the past decade, while Denmark and France remain relatively stable.

Despite fewer sows, EU pig slaughter increased modestly (+2%) in 2025 due to higher prolificacy and higher carcass weights. However, the declining sow base will limit future expansion.

Pigmeat Trade in 2025

Irish pigmeat exports were largely unchanged in the first eight months of 2025, with small increases to the UK and Germany. The UK (36%), China (23%) and Germany (7%) remain Ireland's largest markets. Pigmeat imports into Ireland increased substantially (+12%), mainly from Northern Ireland, the Netherlands and Germany.

EU exports overall increased slightly, although trends vary by country. Spain continues to dominate EU export growth, while Germany and Denmark exported less.

China's influence

China remains a critical market, taking 25% of total EU pigmeat exports. In 2025, China imposed tariffs of 30–50% on EU pigmeat in retaliation for EU tariffs on Chinese electric vehicles. This reduced EU competitiveness and pressured prices, especially for lower-value cuts and offal that are vital to processor returns.

Feed Price Outlook 2026

Global feed markets have stabilised, with maize, wheat and soyabean prices easing on the back of strong production forecasts in the Black Sea region, the U.S., Brazil and Argentina. Wheat stocks among major exporters are expected to increase, while soyabean output continues to rise.

“Global feed markets have stabilised notably”

The composite Irish pig feed price for 2026 is expected to average 125c/kg dwt (about €360/t)—a slight decline of 2% compared with 2025. Modest increases may occur after the 2026 harvest, but overall the outlook is stable.

Pig Price Outlook 2026

EU pig prices in 2026 will largely depend on pigmeat supply and export performance. The declining EU sow herd is unlikely to recover soon, due to rising welfare, housing and environmental compliance costs and general reluctance to invest. EU output is expected to increase marginally (1%) in 2026.

EU self-sufficiency is falling (from 126% in 2021 to a forecast 115% in 2026), limiting downside pressure but not enough to offset weak export demand caused by Chinese tariffs. With China accounting for almost one-quarter of EU export volume, reduced competitiveness will weigh on prices. The recent ASF outbreak in Spain is evolving and the pigmeat market price response will depend on whether the disease outbreak can be contained in the coming months.

Overall, Irish retail demand is stable, but weak export returns and higher import volumes suggest that Irish pig prices will continue at a low level in early 2026, recover marginally during Q2, then flatten before easing again in Q3–Q4.

Profitability Outlook for 2026

With lower pig prices and only slightly lower feed costs, MOF is forecast to fall to about 61c/kg—the minimum needed to cover full production costs. This implies marginal profitability, significantly below the strong returns seen in 2023–2025.

The full Outlook 2026 paper and presentation is available [here](#).

News

10 Things to know about



Edgar Garcia Manzanilla, Head of Teagasc's Pig and Poultry Department, recently featured on RTÉ's 10 Things to Know About... Bacteria, which examined the growing challenge of antimicrobial resistance and the role of agriculture in addressing it.

Edgar outlined how strong collaboration between Irish farmers, vets and researchers has delivered real progress over the past decade. Two National Action Plans have helped to measure, understand and rationalise antibiotic use in livestock, reducing overall use and avoiding antibiotics that are critically important for human medicine.

He also highlighted the importance of the One Health approach, recognising the close links between human, animal and environmental health in tackling antimicrobial resistance.

The episode is available to watch back on RTÉ Player.

Supporting an Advisory Service in Malta

Teagasc Pig team are involved in supporting the Maltese Ministry for Agriculture & Animal Rights to set up a Pig Advisory service for their pig producers. This is a joint project between Teagasc and the Malta Ministry of Agriculture & Animal Rights and is funded and supported by CIHEAM Zaragoza. CIHEAM is one of the four Institutes of the International Centre for Advanced Agronomic Mediterranean Studies, a leading centre for international training and cooperation in the agro-food sector in the Mediterranean region.

The project was instigated by CIHEAM Zaragoza earlier this year, following their interest in the Teagasc Pig Development Department advisory model. We have visited Malta several times since March and carried out farm visits across Malta and Gozo, along with farmer workshops. During our most recent visit, we brought a pregnancy scanner and trained a Maltese Ministry veterinarian in its use, enabling the introduction of a scanning service to help identify NIPs earlier and improve pig supply. We have identified a Technical Specialist (Advisor), Maria Spiteri, from Malta to work directly with pig farmers,

with ongoing support from Teagasc. Plans are in place to bring Maria to Ireland in early 2026 for further training.



On September 30th, the Maltese Minister of Agriculture, Fisheries & Animal Rights, Anton Refalo, officially launched the new technical project (MAFA, CIHEAM and Teagasc) at the farm of Mario Abela. The launch received strong coverage across Maltese media and was attended and addressed by the Minister, MAHA and Teagasc.

It is a significant project, with strong farmer engagement and good progress to date, and the appointment of a local advisor will allow the project's impact to be broadened further.

