



pig watch

[5TH EDITION]

2024

SOURCE: PEXELS

CONTENTS

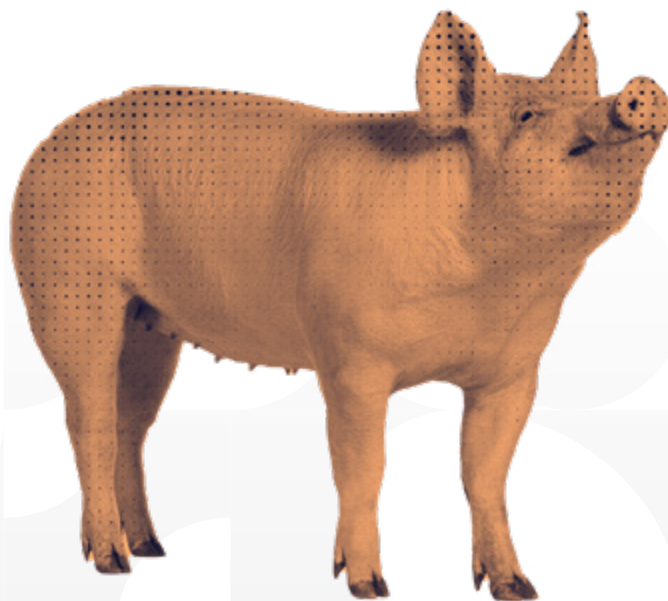
1. ABOUT ALIANIMA	3
2. ABOUT ANIMAL WATCH.....	4
2.1 ABOUT PIG WATCH.....	5
3. OVERVIEW OF BRAZILIAN PIG FARMING	6
4. METHODOLOGY	12
5. RESULTS	17
5.1 GESTATION HOUSING... ..	20
5.1.1 SUPPLIERS.....	22
5.1.2 BUYERS	31
5.2 FARROWING HOUSING AND PIGLET MANAGEMENT	36
5.2.1 SUPPLIERS	37
5.2.2 BUYERS.....	45
5.3 USE OF ANTIMICROBIALS	47
5.3.1 SUPPLIERS	50
5.3.2 BUYERS.....	59
6. CONCLUSIONS	61
7. CONTACT	63

1. ABOUT ALIANIMA

Alianima is a non-profit organization that works closely with leaders in the food industry to identify and address the main challenges faced by the animal production chain. We offer partnerships, consulting services, and free technical support to companies committed to improving animal welfare, assisting in the implementation of sustainable and humane practices.

Our specialized technical team bases all its actions and materials on scientific data. Our mission is to promote an industry that is more attentive to animal suffering and to encourage consumers to be more informed about the origins of their food, fostering critical and conscious consumption.

Learn more about our work at alianima.org.



2. ABOUT ANIMAL WATCH

The public announcement of animal welfare commitments by over 200 companies in Brazil has significantly impacted the entire supply chain, especially due to the establishment of deadlines for implementation, which act as catalysts for changes demanded by consumers.

The Animal Watch, a platform developed by Alianima, aims to make public animal welfare commitments of companies operating in the country more visible, with a focus on laying hens and pigs.

In addition to enabling civil society to monitor these commitments, the platform also provides information and updates about our work and the reality of the food production chain. It highlights the industry's role in promoting significant changes in animal treatment, aiming to encourage more critical and conscious consumption.

Visit us at observatorioanimal.com.br.



2.1 ABOUT PIG WATCH

The Pig Watch, an annual report by Alianima, monitors the progress of companies that have publicly committed to phasing out gestation crates in the Brazilian pork industry.

The publication of the report promotes transparency between the food industry and consumers while identifying challenges faced by the sector. This allows us to pinpoint key obstacles hindering a successful transition within the timelines set by each committed company and to offer technical support based on our expertise in animal welfare.

This report is not only intended for the sustainability departments of companies and industries within the sector but also targets conscious consumers who care about both the origins of their food and the welfare of pigs in the production chain.

Since its first edition in 2020, the Pig Watch has engaged the majority of contacted companies and garnered significant media interest. By analyzing the results of participating corporations, we have observed notable progress in transitioning pregnant sows to group housing and reinforced the importance of diligence and transparency throughout the transition process.

This fifth edition expands its scope to include other critical aspects of pig farming relevant to animal welfare: the housing of sows in farrowing crates and the average weaning age of piglets. These are delicate stages of production that receive considerable attention but still face significant challenges, such as intensive confinement in crates and a tendency toward excessively early weaning.

Additionally, we aim to update the state of the industry over the past year through a comparative analysis of previous data, providing an accurate view of the evolution of Brazilian pig farming within the context of animal welfare and One Health principles.

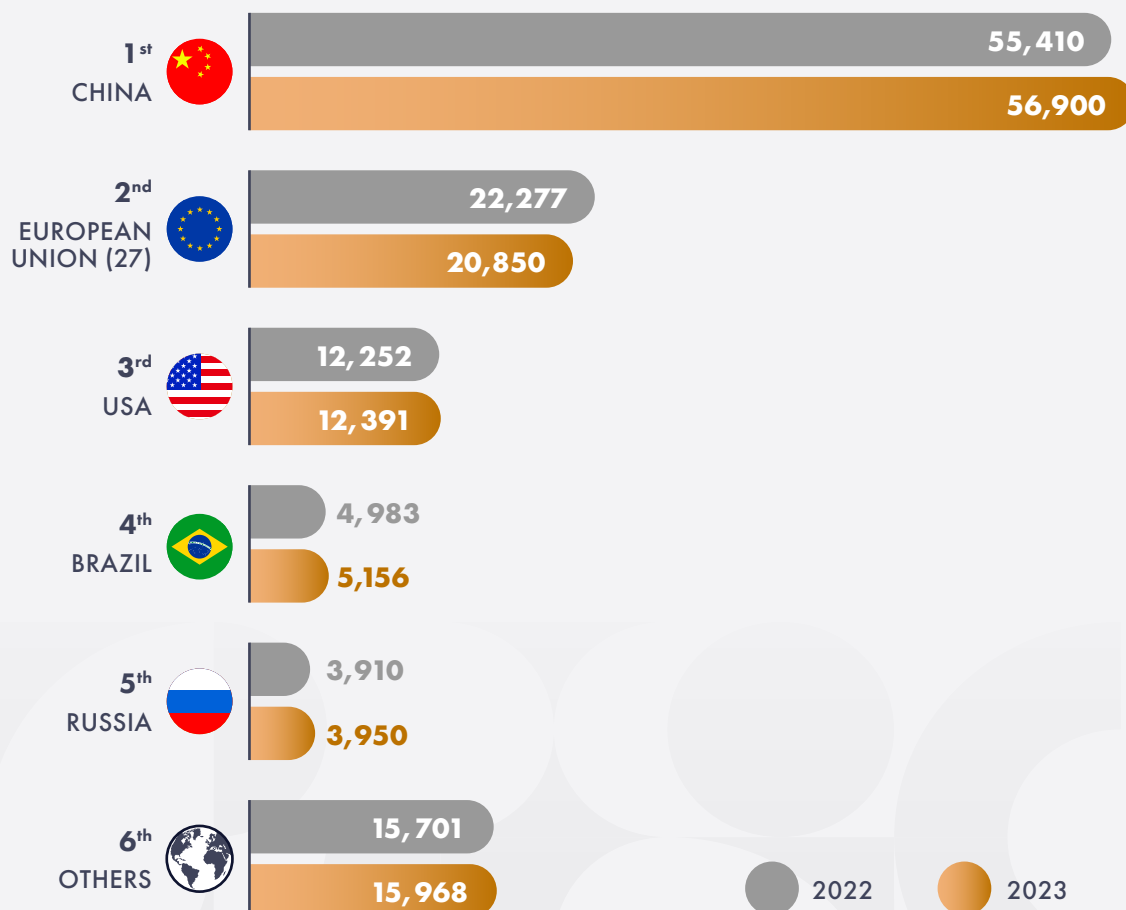


3. OVERVIEW OF BRAZILIAN PIG FARMING

In 2023, Brazil maintained its position as the fourth-largest global producer and exporter of pork, accounting for **4% of total global volume**. The country produced 5.2 million tons of pork, equivalent to **46.5 million slaughtered animals**, continuing a **growth trend that has persisted for at least a decade**, with a 3.5% increase compared to the previous year.

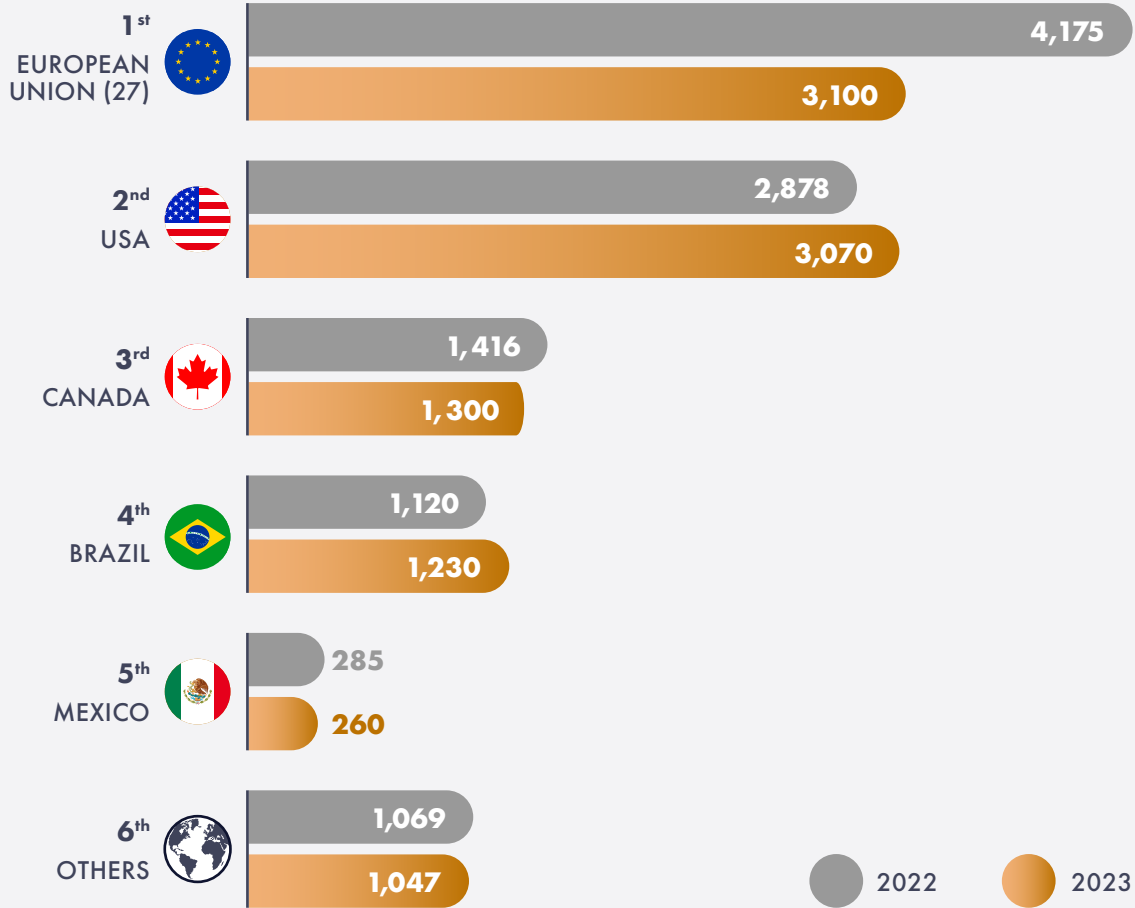
GLOBAL PORK PRODUCTION (THOUSAND TONS)

SOURCE: USDA/ABPA



GLOBAL EXPORTS OF PORK (THOUSAND TONS)

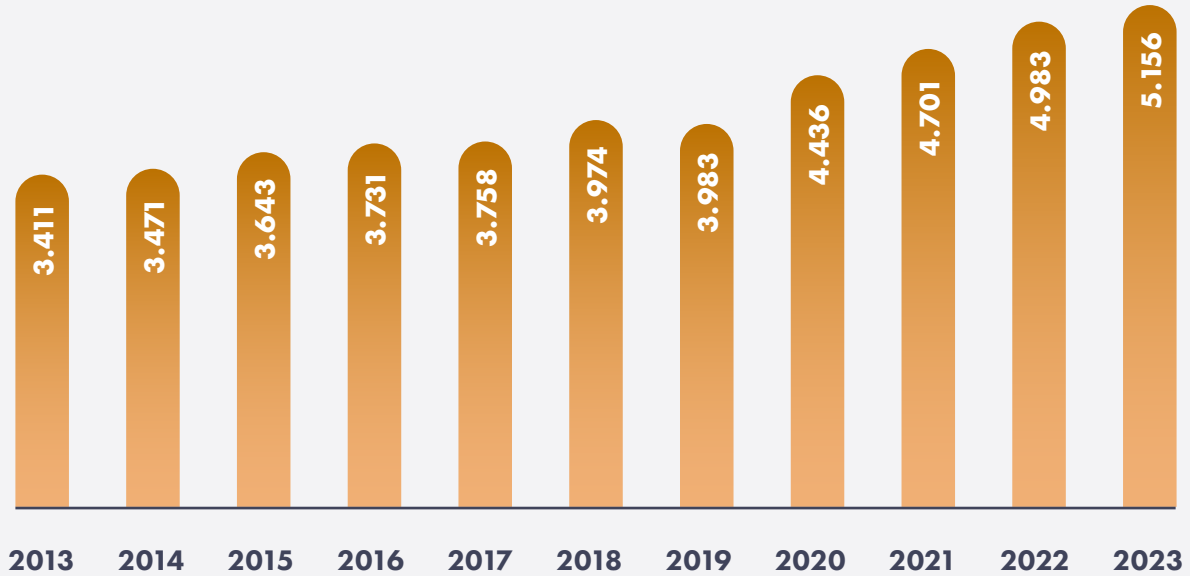
SOURCE: USDA/ABPA



SOURCE: ISTOCKPHOTO

BRAZILIAN PORK PRODUCTION (MILLION TONS)

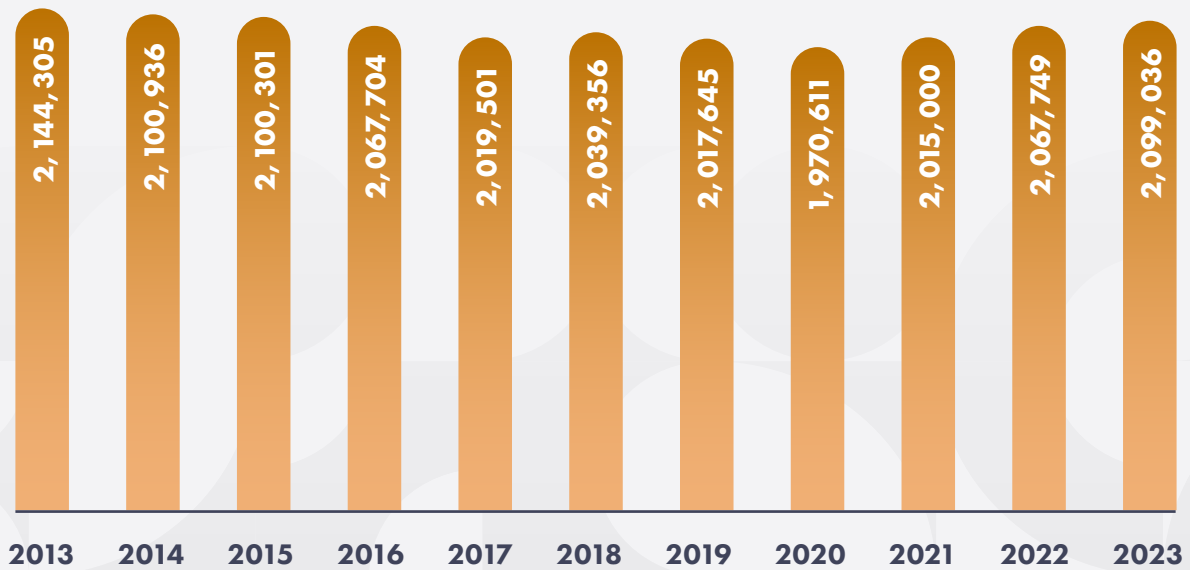
SOURCE: ABPA



To achieve these figures, approximately 2.1 million sows were housed in 2023, a 1.5% increase compared to the previous year.

ACTIVE BREEDING SOWS (HEADCOUNT)

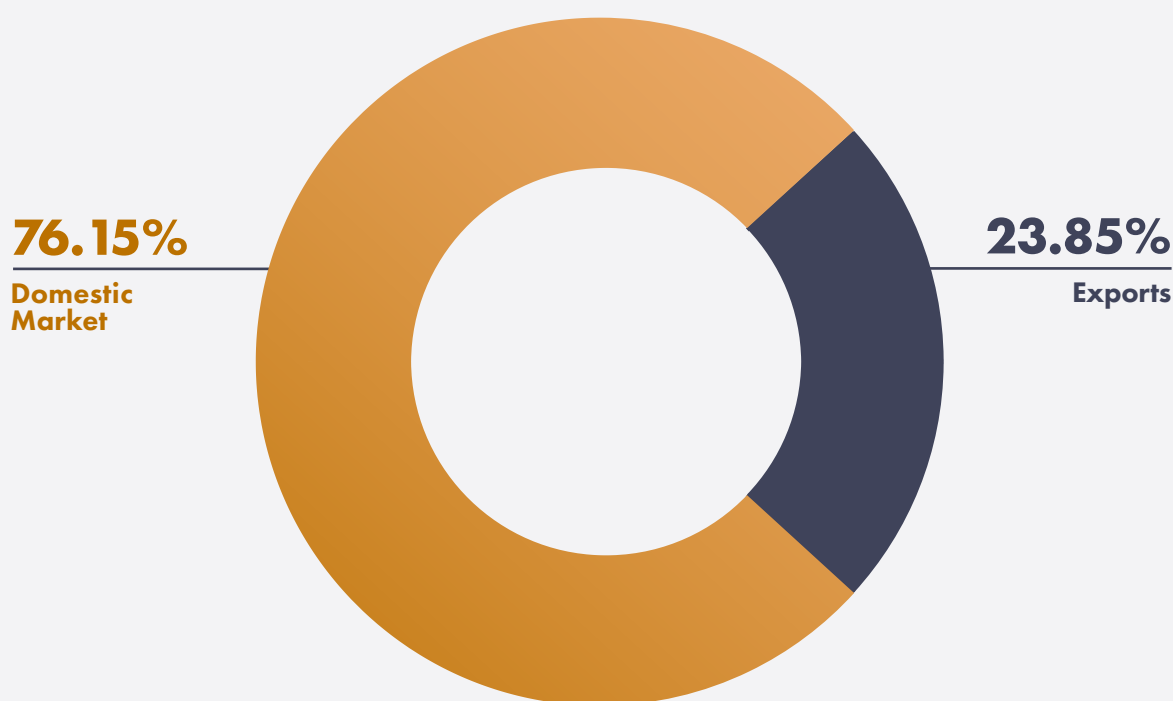
SOURCE: ABPA



According to the Brazilian Animal Protein Association (ABPA)¹, 23.8% of the total production was exported to approximately **90 countries**, primarily in Asia (67%), with China, Hong Kong, and the Philippines accounting for 32%, 10%, and 10% of Brazilian exports, respectively. While domestic per capita consumption remained stable at 18.3 kg/person, Brazil gained access to about **ten additional international markets** compared to 2022.

DESTINATION OF BRAZILIAN PORK PRODUCTION IN 2023

SOURCE: SECEX/ABPA



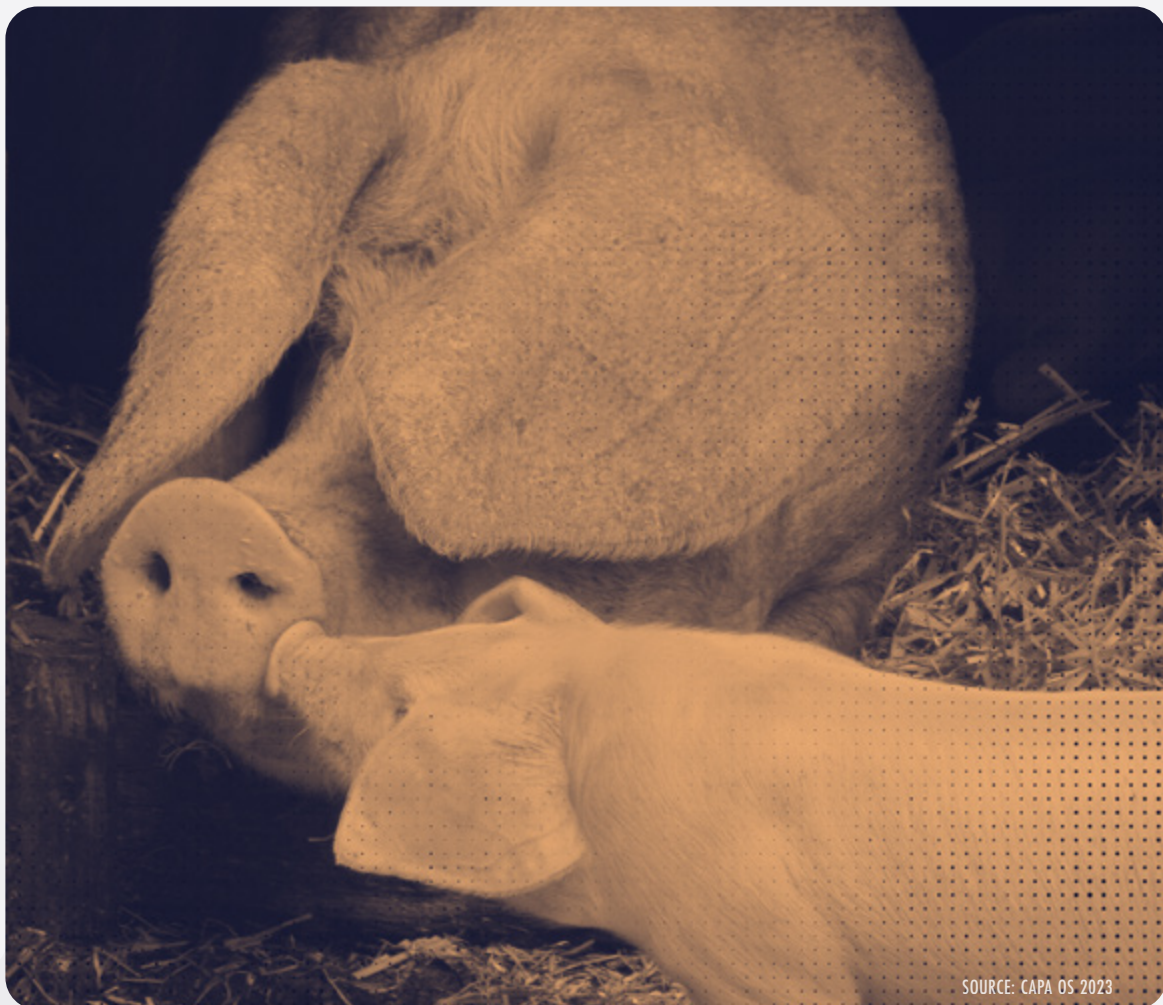
The Brazilian pork industry is primarily composed of integrated producers, followed by processing and exporting companies. Implementing better animal welfare practices in production systems is crucial, not only to ensure animal quality of life but also to maintain Brazil’s competitiveness on the global stage.

It is worth noting that the use of gestation crates for pigs has already been prohibited in several countries, such as Norway, New Zealand, Sweden,

¹ ABPA. 2024. “Relatório Anual 2024.” ABPA. https://abpa-br.org/wp-content/uploads/2024/04/ABPA-Relatorio-Anual-2024_capa_frango.pdf.

Switzerland, the United Kingdom, and in some U.S. states. Additionally, this practice has been restricted in the European Union since 2013, where it is allowed only up to 28 days after breeding. Adapting to animal welfare standards is, therefore, also a response to demands imposed by major international buyers, who establish trade barriers based on these criteria.

Nationally, the Normative Instruction No. 113² issued in 2020 by the Ministry of Agriculture and Livestock (MAPA) and in effect since 2021, sets guidelines for good practices in management and animal welfare for commercial pig farms.



² MAPA. 2020. “Instrução Normativa N° 113.” Diário Oficial da União. <https://www.in.gov.br/en/web/dou/-/instrucao-normativa-n-113-de-16-de-dezembro-de-2020-294915279>.



THE MAIN GUIDELINES OF THE NORMATIVE TEXT DEFINE THAT:

- **Gestation crates must be banned by January 2045;**
- **In all and any surgical castration, analgesia and anesthesia must be used from January 2030;**
- **Tail docking should be avoided; however, it remains tolerated when only the final third of the tail is mutilated, and performed in a way that minimizes any pain and further complications for the animal;**
- **Ear notching is prohibited from January 2030;**
- **Teeth clipping of piglets is prohibited, and grinding can be carried out only when necessary;**
- **Piglets must be weaned at an average age of 24 days or more starting in January 2045;**
- **The use of electric prods and aggressive handling of pigs is prohibited;**
- **Pigs must have access to environmental enrichment.**

Although Normative Instruction No. 113/2020 represents progress for pig welfare, its adaptation timelines are excessively long. Considering that major Brazilian pork-producing corporations and cooperatives have committed to phasing out gestation crates between 2025 and 2029, the regulation's allowance of an additional 20 years may be seen as a setback. Therefore, it is critical that companies uphold their commitments rather than adjust their timelines to align with the regulation, ensuring that compliance is not merely a matter of regulatory adherence but a genuine commitment to animal welfare.

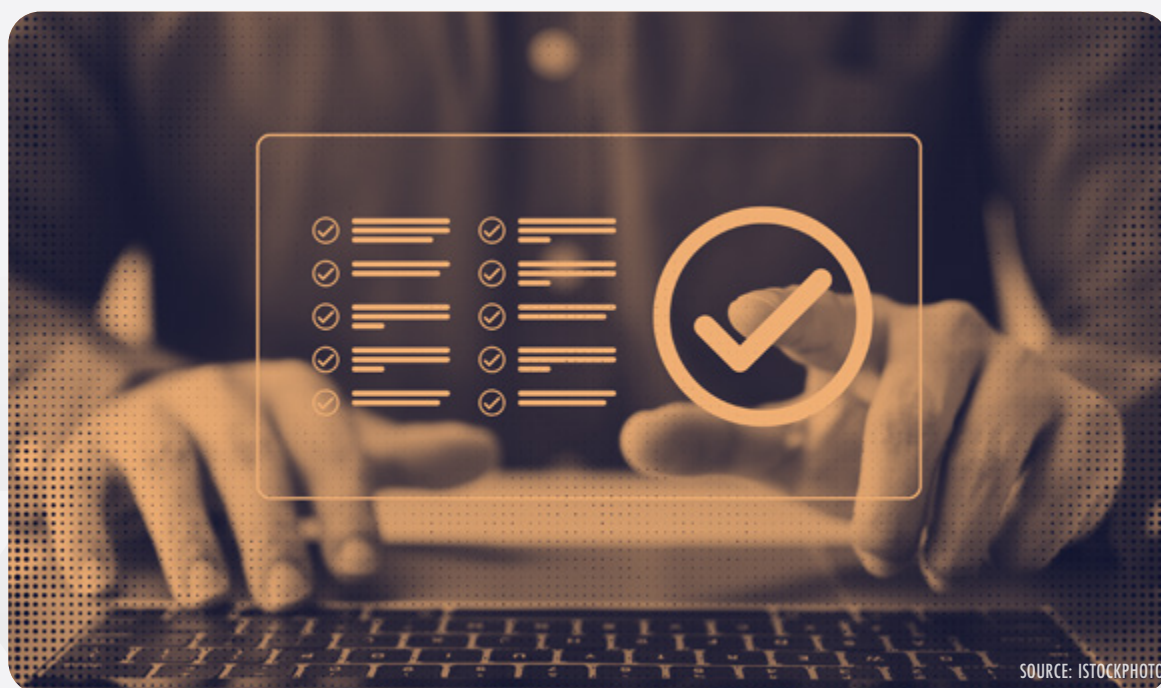
4. METHODOLOGY

As in previous editions of the Pig Watch, two distinct questionnaires were employed: one for pork suppliers and another for buyers, such as restaurants and retailers.

All companies operating in Brazil that had publicly committed to eliminating gestation crates by the first half of 2024 were contacted via email to participate in the Pig Watch.

Carrefour Brasil Group published a pig welfare policy in 2020 that applies solely to own-brand (Sabor & Qualidade) fresh (non-processed) pork, making it a **partial commitment**. However, due to its significant role in the sector (as the country’s largest retailer) and the progress reported in a transparent dialogue, the company was invited to participate in the Pig Watch starting last year.

By the end of 2023, the cooperatives Frísia, Castrolanda, and Capal (Unium) became members of **Aurora Coop**. As a Central Cooperative, Aurora Coop took over operations at Unium’s Meat Processing Unit (**Alegria Foods**).



Below is a list of these companies, organized alphabetically and categorized by sector, as previously defined:

SUPPLIERS		
 Alegra Foods	 Alibem Alimentos*	 Aurora Coop
 BRF S.A. (Sadia and Perdigão)	 Frimesa	 JBS Brasil (Seara)
 Pamplona Alimentos S.A.	 ALIMENTOS Pif Paf Alimentos S.A.	

*Companies contacted for the first time to participate in the Pig Watch

BUYERS



Antaris Franchising
(Johnny Rockets,
Dickey's Barbecue Pit and
Boulangerie Carioca)*



Arcos Dorados
McDonald's



B. Lem Padaria
Portuguesa



Bob's



(Outback Steakhouse
and Aussie Grill)



Burger King



Casa do Pão de Queijo



Ciao Pizzeria
Napoletana



Dídio Pizza



Divino Fogão*



Forno de Minas



(Pão de Açúcar, Extra
and Compre Bem)



(Atacadão, Carrefour,
Sam's Club, Nacional,
Super BomPreço and
TodoDia)



Grupo Dia



Grupo Madero



Grupo Marche



Grupo Trigo (Gendai
and China in Box)



Habibs*



(Grietto, Montana Grill,
Jin Jin and Croasonho)



Hippo Supermercados



Hotel Unique



Marfrig Global
Foods S.A.



Monster Dog



Subway



UnidaSul

*Companies contacted for the first time to participate in
the Pig Watch

The supplier questionnaire covered the following assessment and monitoring items:

- Proportion of sows already housed in group pens during the gestation phase;

- Period which sows are kept in individual crates between insemination and the start of gestation;

- Plans to provide more physical space for sows in the farrowing phase;

- Average weaning age of piglets;

- Implementation of improved practices in piglet management, including the elimination of surgical castration without anesthesia, teeth grinding, tail docking, and ear notching;

- Use of antimicrobials as growth promoters, metaphylaxis, and prophylaxis;

- Provision of information to buyers about the percentage of products sourced from farms using group gestation housing;

- Challenges faced by companies in transitioning to group gestation, improving piglet management, and reducing antimicrobial use.

The buyer questionnaire addressed the following topics:

- Percentage of pork purchased annually from suppliers that house sows in groups during gestation;
- Companies' willingness to require their suppliers to adopt additional pig welfare practices and to end the non-therapeutic use of antimicrobials;
- Availability of information from suppliers about the quantity of products sourced exclusively from farms using group gestation housing;
- Difficulties encountered by companies in securing pork sourced from farms that use group gestation housing.

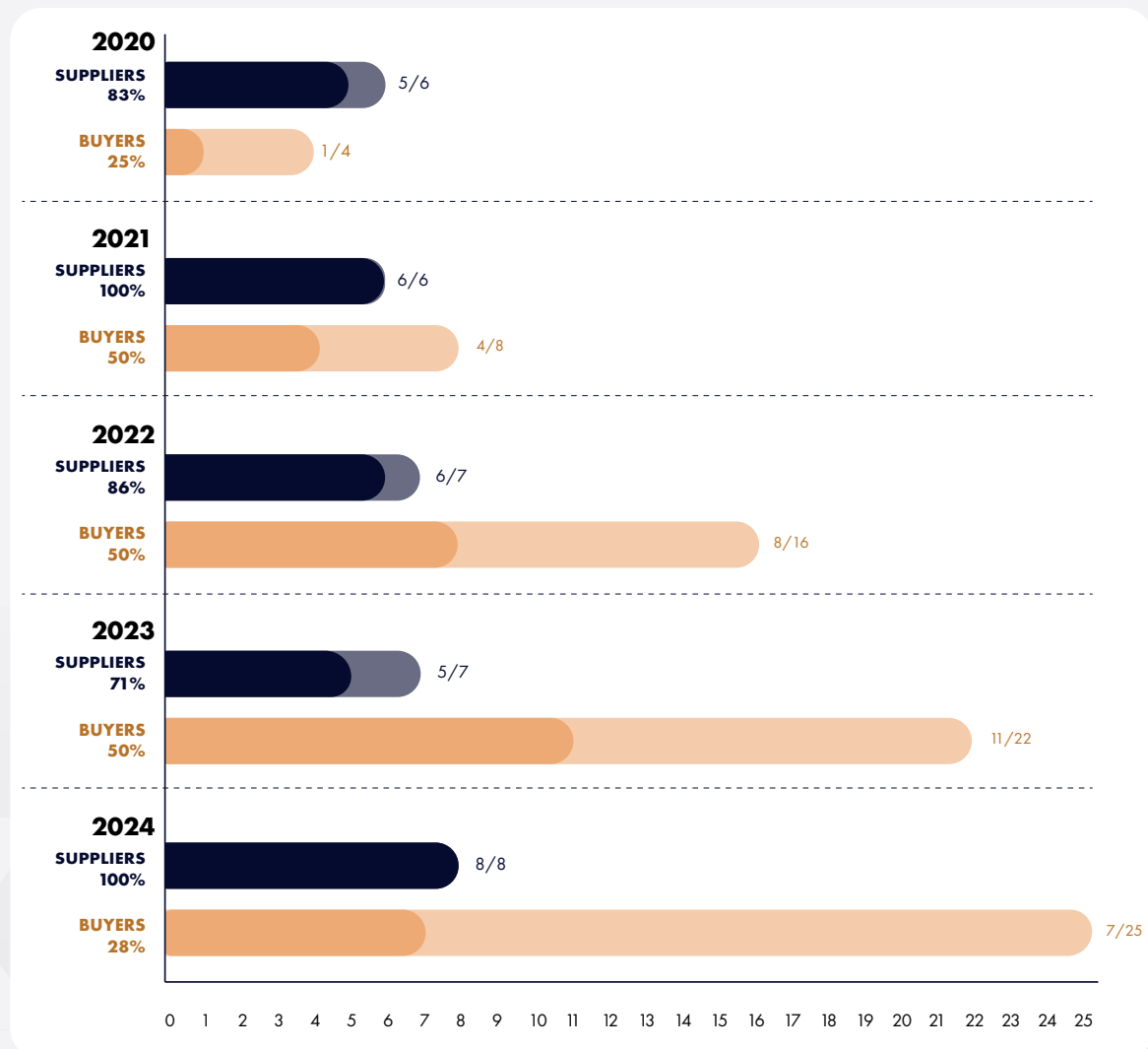
The questionnaires were sent out in August 2024, and companies had a four-week window, until September 2024, to submit their responses. Companies that did not respond to the questionnaire were categorized as “non-respondents.”

All contacted companies were aware of the transparency objective outlined by the Pig Watch regarding the addressed topics and therefore consented to the subsequent publication of results on the Animal Watch platform.

5. RESULTS

A total of 33 companies were approached, consisting of 8 suppliers and 25 buyers — a 13.8% increase compared to the previous edition, due to more commitments to pig welfare from both groups. Out of these 33 companies, 15 (8 suppliers and 7 buyers) responded, representing a 45.5% response rate. Despite the low response rate from the buyer group, for the second time in all editions of the Pig Watch, we achieved a **100% response rate from the supplier group**.

DISTRIBUTION OF PARTICIPATING COMPANIES BY SECTOR AND YEAR



Specifically, it is possible to analyze the responsiveness of each company to the editions of the Pig Watch and, consequently, its level of transparency in the following ranking:

TRANSPARENCY RANKING - SUPPLIERS



TRANSPARENCY RANKING - BUYERS



5.1 GESTATION HOUSING

For buyer companies to report on the progress of the transition to group housing, it is essential that their suppliers provide information on the share of pork produced from gestation crate-free systems that is specifically directed to each buyer company.

As in previous editions, some buyer companies reported not being able to obtain this information from their suppliers. To ensure they can respond properly to the Pig Watch or any consumer inquiries, this issue was again raised to the companies.



SUPPLIERS: Does your company provide specific information on the share of pork from gestation crate-free systems supplied to each requesting buyer?










BUYERS: Do your suppliers provide information on the proportion of pork products coming from gestation crate-free systems when requested?

	RESPONDED YES	RESPONDED NO
SUPPLIERS	<ul style="list-style-type: none"> • Alegra Foods • Alibem Alimentos • Aurora Coop • BRF S.A. • Frimesa • JBS Brasil (Seara Alimentos) • Pamplona Alimentos S.A. • Pif Paf Alimentos 	
BUYERS	<ul style="list-style-type: none"> • Arcos Dorados (McDonald's) • GPA • Grupo Carrefour Brasil • Marfrig Global Foods S.A. 	<ul style="list-style-type: none"> • Bob's • Dídio Pizza • Forno de Minas Indústria de Alimentos

The supplying companies have maintained their affirmative response for the third consecutive year, while the buyers' responses varied significantly. This variation could be due to changes in their supply chain or inconsistencies in the traceability of their suppliers, for example. However, it is crucial that buyer companies acquire this information, as they are committed to no longer using pork from systems that house sows in individual gestation crates.

BUYER RESPONSES ABOUT HAVING ACCESS TO INFORMATION FROM THEIR SUPPLIERS

COMPANIES	2022	2023	2024
 Arcos Dorados McDonald's	NO	NO	YES
 Bob's	NO	YES	NO
 Dídio Pizza	YES	YES	NO
 Forno de Minas	YES	NO	NO
 (Pão de Açúcar, Extra and Compre Bem)	NO	YES	YES
 (Atacadão, Carrefour, Sam's Club, Nacional, Super BomPreço and TodoDia)		YES	YES
 Marfrig Global Foods S.A.	YES	NO	YES

LEGEND: ● YES ● NO

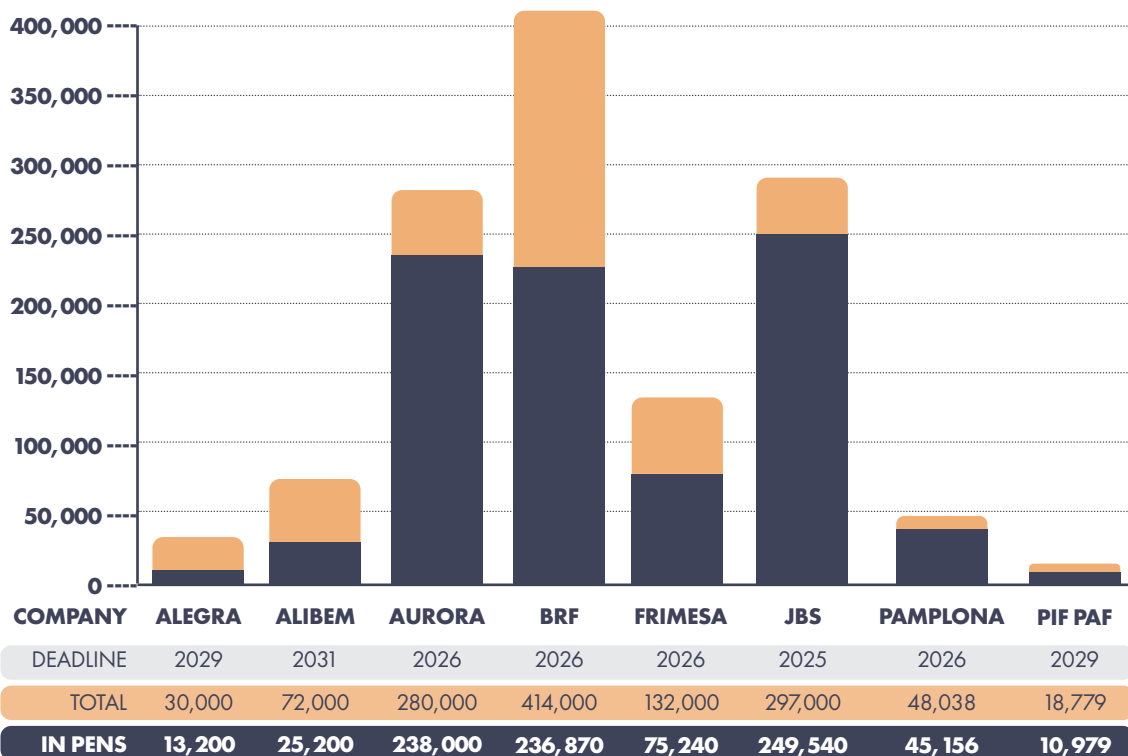
5.1.1 SUPPLIERS

In order to provide a better proportional view of the number of sows housed in groups during gestation compared to the total number of sows housed by each company, both absolute numbers were asked from the suppliers.

Although **Alibem** presents the lowest proportion of sows in group housing, it is important to consider that the company published its commitment last, in September 2023, and has a longer transition deadline (2031).

Another noteworthy result is that, despite **BRF** housing a significantly higher number of sows compared to **JBS** and **Aurora** (39% and 48% more, respectively), BRF still has a lower number of sows in group pens. This could be explained by **JBS's** slightly shorter transition deadline.

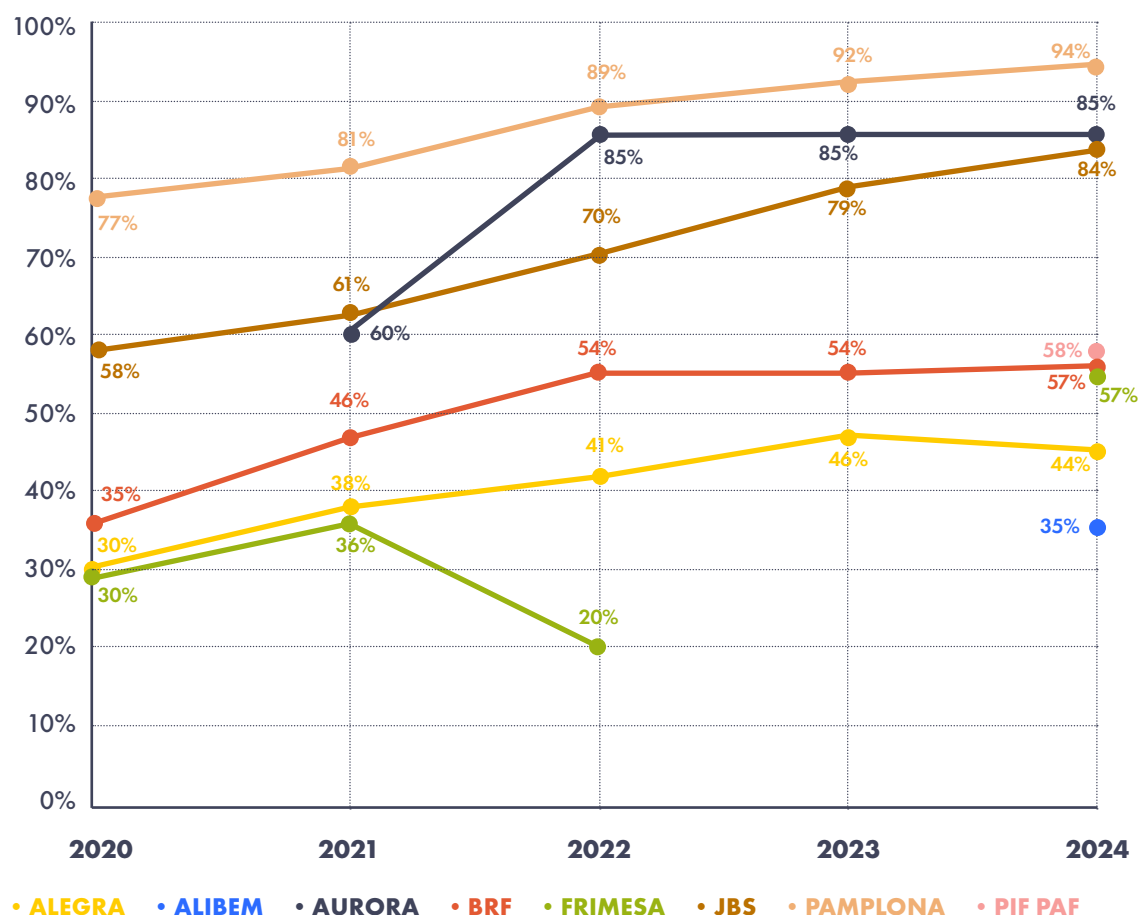
PROPORTION OF SOWS HOUSED IN GROUP PENS AMONG THE TOTAL OF EACH COMPANY



Another important perspective is to observe the values through an individual evolution analysis over the years, starting from the first edition of the Pig Watch in 2020.

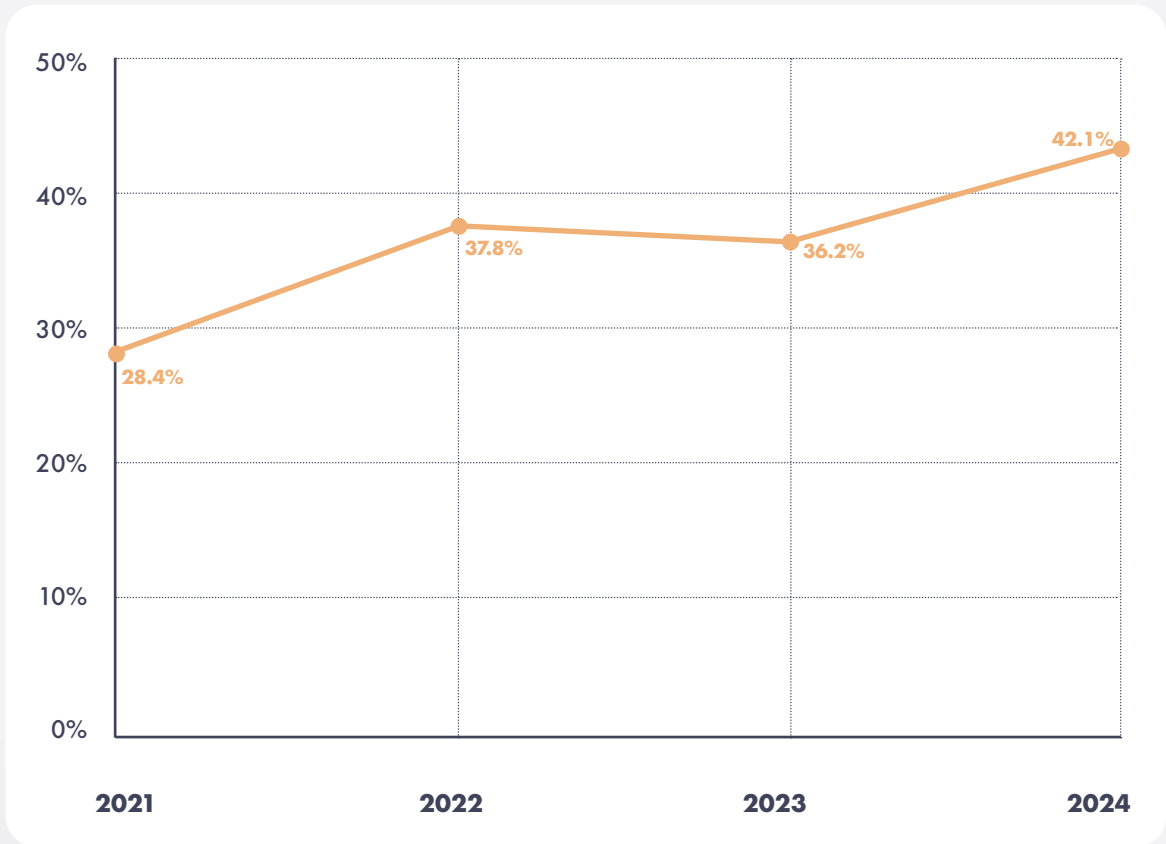
It can be noted that **Alegra** showed a slight **decrease** of 2% in the last year, while **Aurora** **stagnated over the past two years**, with no increase in the number of sows in either case. **BRF**, which had stagnated in the previous edition, **once again showed progress** with a modest increase of three percentage points. **Frimesa**, which did not participate in the Pig Watch last year, thankfully responded this time, showing a **significant increase** of 37% compared to the data reported in the 2022 edition.

PERCENTAGE OF SOWS HOUSED IN GROUP PENS BY COMPANY AND YEAR



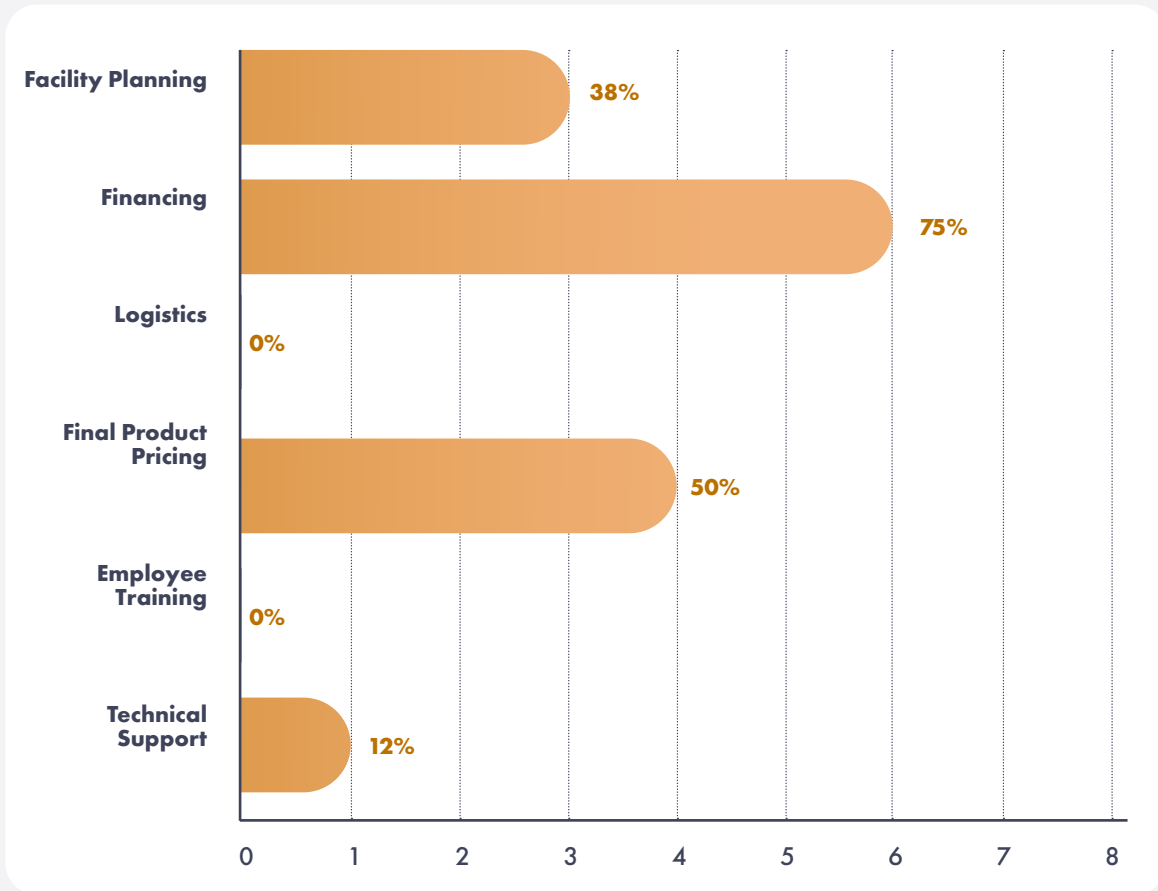
Considering the number of active sows housed in Brazil, according to the latest annual report from ABPA, it is estimated that 42.1% of these animals are being housed in group pens during gestation. Although this figure may not be highly precise, as it depends on the continued participation of all suppliers committed to the Pig Watch, it is valid to outline an approximate overview of the national transition, in order to analyze the evolution over the past few years.

ESTIMATED PERCENTAGE OF SOWS HOUSED IN GROUP PENS IN BRAZIL PER YEAR



When asked about the difficulties encountered in continuing the transition to group housing, for the second consecutive year, **Pamplona** was the only company that reported no obstacles. The lack of financing continues to be the biggest complaint, with 75% of respondents, while issues related to logistics and employee training did not emerge as obstacles this time.

? Has the company encountered **DIFFICULTIES** in continuing the transition to group housing?



Alibem Alimentos

“Reduction in productivity due to lower farrowing rates and reduced female stock in the animal welfare adjustments of existing farms. In addition, the high cost of farm adjustments, limited availability of credit lines, and high interest rates, combined with the challenging domestic and international market scenario and the prices practiced over the last 30 months, end up affecting the speed of the process.”



BRF S.A.
(Sadia and Perdigão)

“The problems have been recurring over the years: high structural adjustment costs for the properties, with no way to pass these costs on to consumers; lack of credit lines specifically for property adjustments (those that support the amounts involved for adjustments have high interest rates); due to the high costs, smaller properties will become unfeasible, leading to a withdrawal from the activity and creating a social problem in rural areas.”



Frimesa

“Since there are new and large farms (10,000 sows) built in 2017/2018, we are having difficulty enforcing the migration, as they are still paying off the construction loans. For older farms, which are being renovated and/or expanded, it has been easier to work on changing the system. However, some old farms do not have the infrastructure for this, and producers are unable to afford the renovations, leading to a social impasse. If we require immediate modification, these families could stop the activity, which is often their only source of income.”



JBS Brasil (Seara)

“The older pig farming sector has small farms with modest scales and limited space for expansion, which is necessary for the migration from individual housing systems to collective systems. Therefore, for the adjustment to be complete, a reduction in the sow inventory is required, which leads to a decrease in the farm’s revenue, challenging the viability of the activity.”

In addition to the migration from individual crates to group pens, it is important that the period which sows remain in the crates between the end of maternity and insemination for the next cycle is as short as possible. Therefore, suppliers were also asked about the distribution of sows in each period, and the intention to reduce this to a ‘pre-implantation’ system. From last year to this edition, an improvement is noted from **JBS**, which, despite facing difficulties, currently has more than half of the sows in the ‘pre-implantation’ system and intends to reduce the time for the others. **Alegra, Aurora, and Pif Paf** stated that they will follow the requirements of IN 113, which allows up to 35 days, whereas last year Alegra reported a period of up to 7 days in its response.



What is the **HOUSING PERIOD** of sows in individual crates at the beginning of pregnancy as set by the company, before moving them to the group pens?

Company	Up to 7 days ("pre-implantation")	Up to 28 days	Up to 35 days	Up to 42 days	Intention to reduce it to 7 days?
Alegra	0%	0%	41.7%	58.3%	✗
Alibem	0%	0%	100%	0%	✓
Aurora	0%	0%	66.8%	33.2%	✗
BRF	8.9%	91.1%	0%	0%	✓
Frimesa	2.7%	0%	97.3%	0%	✓
JBS	57.3%	3.1%	39.6%	0%	✓
Pamplona	60.1%	0%	39.9%	0%	✓
Pif Paf	47.9%	26.8%	25.3%	0%	✗


Regarding the perception of advantages and disadvantages of the “pre-implantation” system, even companies that reported not applying this practice pointed out negative aspects, such as reproductive losses, challenges in maintaining an adequate body condition score for sows, and difficulties in detecting diseases. For suppliers already using the “pre-implantation” system, the reported advantages went beyond welfare and physical and mental health improvements, including better sow performance, lower operational costs, and easier management. It would be relevant to investigate how these potential benefits might offset (and in what timeframe) the costs of transition and adaptation, which tend to be temporary.

? Has the company experienced any **ADVANTAGES AND/OR DISADVANTAGES with the “pre-implantation” system?**



Alegra Foods

 **Advantages:** "No".

 **Disadvantages:** “10 to 15% increase in farrowing rate losses. There is also greater difficulty in keeping sows within the ideal body condition score and in early identification of sick animals, which may lead to increased mortality.”



Aurora Coop





Alibem Alimentos

Has no experience with pre-implantation system.



BRF S.A.
(Sadia and Perdigão)


 **Advantages:** “As matrizes têm maior liberdade de movimento, o que melhora a saúde física (menor incidência de infecções urinárias) e mental. O ambiente coletivo permite que as fêmeas interajam socialmente, o que é mais natural para elas. Há redução de ocorrência de estereotípias e de vocalização excessiva”.

 **Disadvantages:** “Particularly during the first days after group formation, there is an increase in aggression among sows as they establish a social hierarchy, leading to more fights, injuries, and a decline in reproductive indicators. The system also requires more complex management, as individual monitoring of sows becomes more challenging, especially in terms of health and heat return detection, necessitating either technologies or increased labor to identify health issues. Pre-implantation system demands more physical space on the property, which poses a challenge for farms with limited infrastructure or a shortage of labor, and represents a significant initial cost. Feeding management needs to be carefully controlled to ensure all sows receive the appropriate amount of feed, as competition within groups may result in sows with inadequate body condition scores.”

Frimesa


Frimesa


 **Advantages:** "No".

 **Disadvantages:** “We have a few farms working with pre-implantation system, but they are having difficulties in terms of return to heat and abortions.”



JBS Brasil (Seara)

 **Advantages:** “Improved zootechnical and reproductive performance indicators, fewer urinary tract infections, increased positive interactions among sows. Higher water consumption contributes to better health.”

 **Disadvantages:** “For conventional farms undergoing adaptation, pre-implantation system faces implementation challenges regarding the availability of physical space for expansion and high costs due to the need for greater investment in layout changes. However, for new projects, no difficulties have been observed.”



Pamplona
Alimentos S.A.


 **Advantages:** "No".


 **Disadvantages:** "No".



ALIMENTOS

Pif Paf

 **Advantages:** “Reduction in operational costs, less restriction on space and animal behavior, simplification of management with fewer interventions from staff (reducing stress), and the possibility of using new technologies (such as automatic feeders).”

 **Disadvantages:** “Hierarchy fights, embryonic losses, risks of injuries, and a reduction in the number of housed animals.”

5.1.2 BUYERS

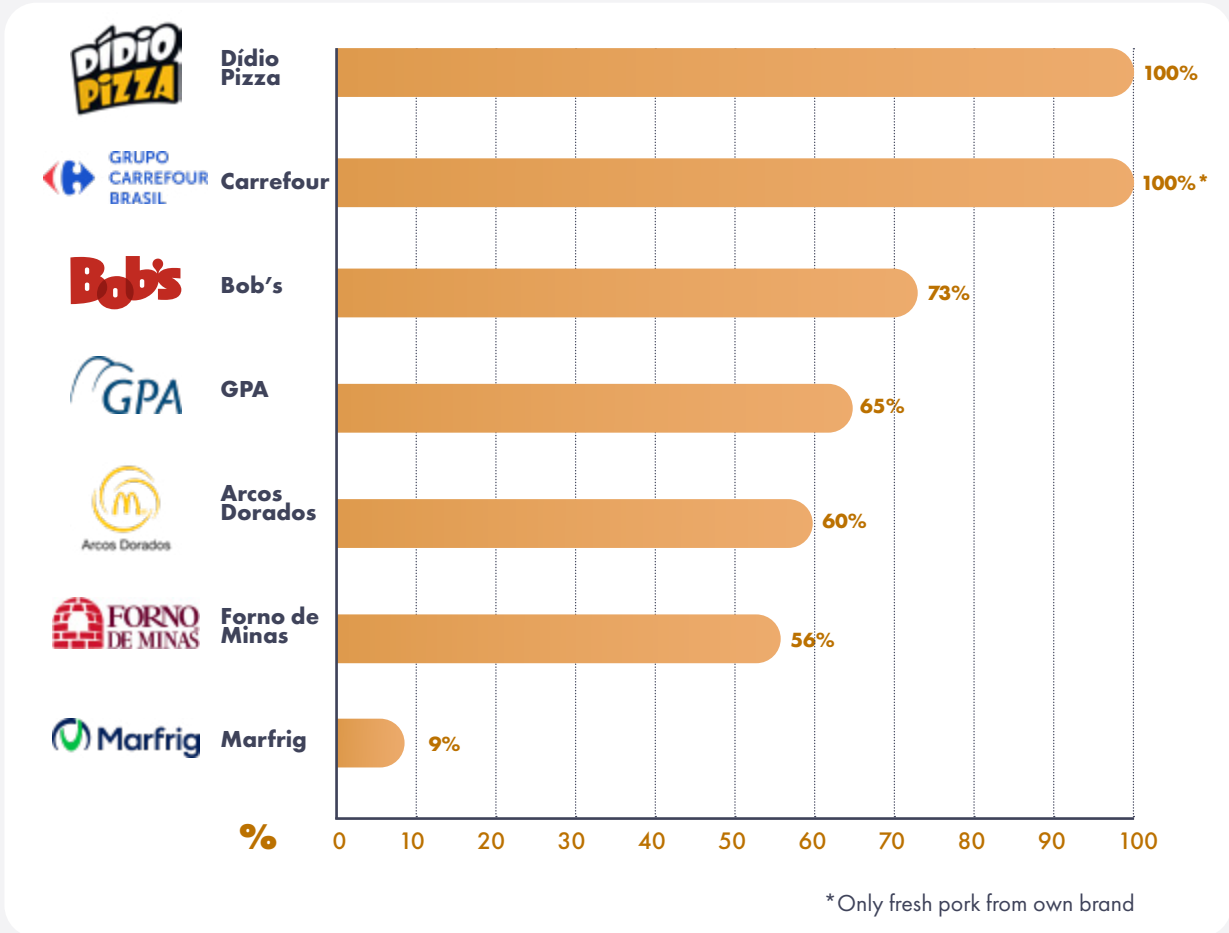
Since the companies in the buyers group have also published commitments to sourcing pork exclusively from suppliers adopting group housing systems, the Pig Watch seeks to understand the progress of these corporate animal welfare policies.

Despite a reduction in the number of companies responding to the survey, it is quite satisfying to observe that **100%** of the pork supplied to **Dídio Pizza** and **Carrefour** (the latter referring only to fresh pork from its own brand, excluding other brands sold by the Group and processed own-brand products) continues to come from sows housed in group systems.

Similarly, there has been significant progress in the case of **Bob's** and a slight improvement for **Forno de Minas**. However, as these companies and **Dídio Pizza** reported being unable to obtain this information from their suppliers, it is questionable how they estimate these values.



? What **PERCENTAGE** of pork in your supply chain comes from group gestation systems?



Arcos Dorados showed a slight increase compared to the previous year, but it has still not set a deadline for achieving 100% of its suppliers, which makes its animal welfare policy weak and controversial.

Furthermore, it is concerning to note that 44% of the companies have never reported progress, which is particularly troubling given that nearly half of them have a deadline until 2025.

PERCENTAGE OF PORK MEAT SOURCED FROM SUPPLIERS THAT HOUSE SOWS IN GROUP PENS BY COMPANY AND YEAR

Company	Deadline	2023	2024
Antaris Franchising	2026	did not participate	no response
Arcos Dorados	no deadline	58%	60%
B.Lem Padaria Portuguesa	2026	5% ¹	no response
Bob's	2025	61%	73%
Bloomin' Brands	2029	never responded	
Burger King	2025	never responded	
Carrefour	2022	100% ²	100% ²
Casa do Pão de Queijo	2026	never responded	
Ciao Pizzeria Napoletana	2025	never responded	
Dia	2028	unknown by the company	no response
Dídio Pizza	2026	100%	100%
Divino Fogão	2029	did not participate	no response
Forno de Minas	2029	54%	56%
GPA	2028	59%	65%
Grupo Trigo	2025	never responded	
Habib's	2026	did not participate	no response
Halipar	2025	never responded	
Hippo Supermercados	2026	60%	no response
Hotel Unique	2026	61%	no response
Madero	2027	never responded	
Marfrig	2026	1% ³	9%
Monster Dog	2026	never responded	
St. Marche	2028	never responded	
Subway	2025	never responded	
Unidasul	2026	never responded	

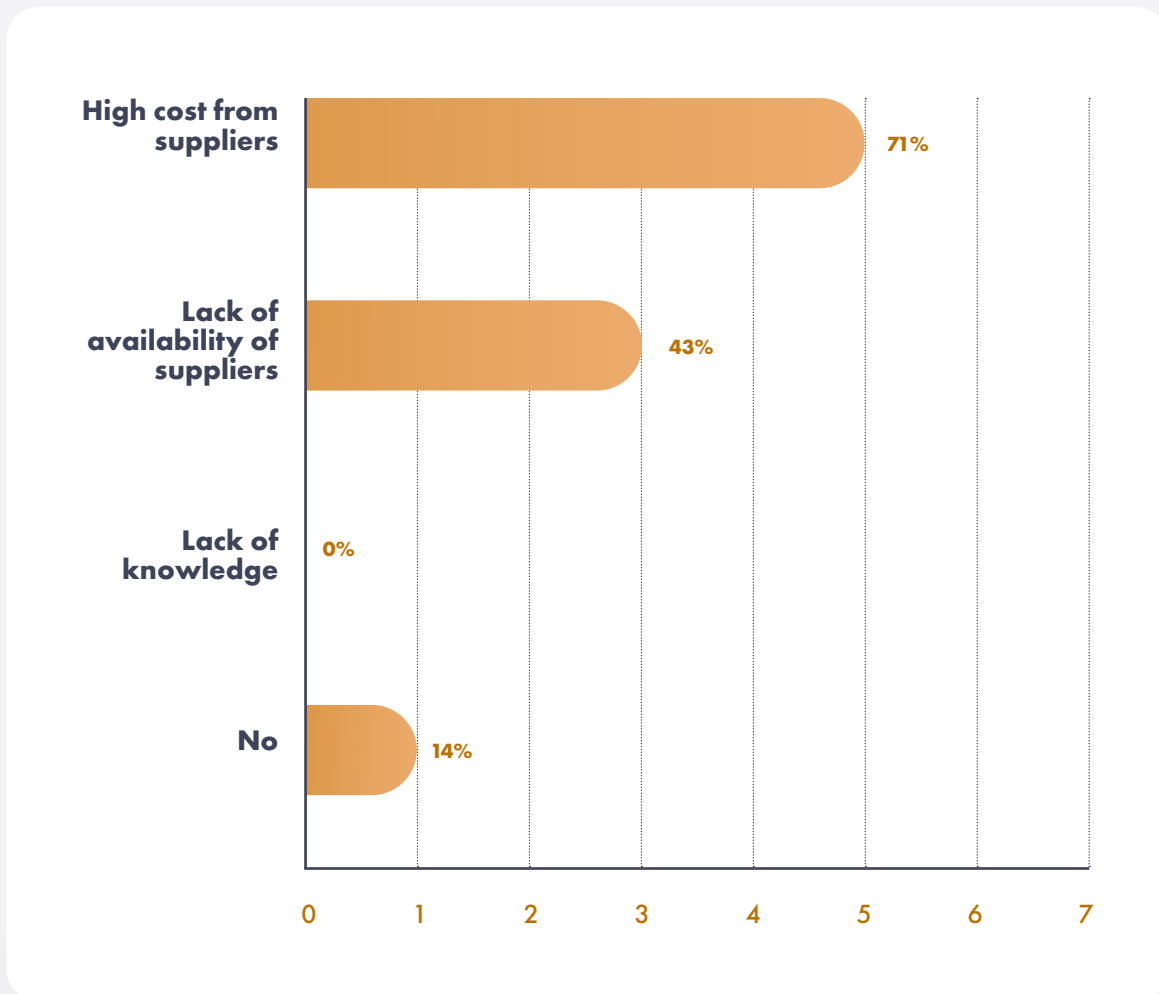
¹ Estimate due to lack of supplier data

² Only fresh meat from the company's own brand

³ Data from only 15% of suppliers

All responding companies, except **Dídio Pizza**, reported facing some difficulty in sourcing pork from farms free of gestation crates:

? Has the company encountered **DIFFICULTIES** in obtaining more supply of products from gestation crate-free systems?



Bob's

“We know that cost is part of this gestation system. Bob's, together with its suppliers, has established aligned commitments to better shape the value chain.”



Arcos Dorados
McDonald's

“Difficulties in chain traceability”



(Atacadão, Carrefour,
Sam's Club, Nacional, Super
BomPreço and TodoDia)

“The increase in supplier costs impacts the final product price, making it unaffordable for many Brazilian consumers.”



(Pão de Açúcar, Extra
and Compre Bem)

“We conduct third-party audits on the farms of our fresh pork suppliers. The audit protocol was developed in accordance with the Animal Welfare Policy and the Animal Welfare and Biosecurity Guidelines, created with support from ABCS. The results of the audits indicated that the suppliers are at different stages of maturity on this issue and face difficulties in meeting the criteria for gestation crate-free farms, which require significant investments and structural changes. To develop and support the suppliers, we have established action plans to continuously assess compliance with the commitment and identify opportunities. Additionally, we promote training sessions and engagement webinars throughout the year.”

5.2 FARROWING HOUSING AND PIGLET MANAGEMENT

For the first time, the Pig Watch asked companies about offering more physical space for sows in the farrowing crates and the average weaning age of piglets. It is understandable that animal welfare improvements are implemented gradually, and as the most critical issues evolve in industrial pig farming, the next ones should be brought into the corporations in a continuous progress.

The farrowing crates are problematic just like the gestation crates due to the limited space, but also because, at this stage, sows feel the need to build a nest in a quiet and secluded place to give birth to their piglets with a minimum of comfort and safety, which is not possible with the way they are housed in the industry. And although the crates are supposedly designed to prevent sows from crushing their piglets, this remains the leading cause of piglet mortality in the farrowing crate. In other words, the system is inefficient and harms the welfare of the animals.

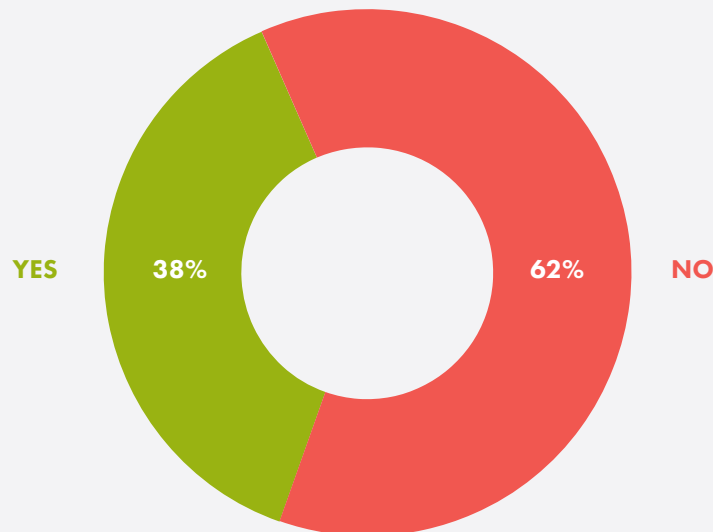


5.2.1 Suppliers

At this first stage, companies were asked if they had future plans to provide more space for sows in the farrowing crate, with at least 4.32 m².

Of the suppliers, 38%, or three out of eight companies — **Alibem, BRF, and Pamplona** — responded positively. For those who stated that they do not plan to increase the space allocated to the sows and their litters, a justification for the response was requested.

? Does the company have future plans to provide more space for sows in the farrowing crate, with at least 4.32 m²?



Yes: Alibem, BRF and Pamplona

No: Alegra, Aurora, Frimesa, JBS and Pif Paf



Alegra Foods



Aurora Coop



Frimesa

“We will comply with the requirements of IN 113.”



JBS Brasil (Seara)

“At the moment, we are focused on the adaptation to gestation housing, which has been quite a big challenge, as it is the housing where the female spends most of her time. Regarding the farrowing area, we have not yet found a ‘recipe’ that allows us to evolve while offering or maintaining the competitiveness of the process.”



ALIMENTOS

Pif Paf

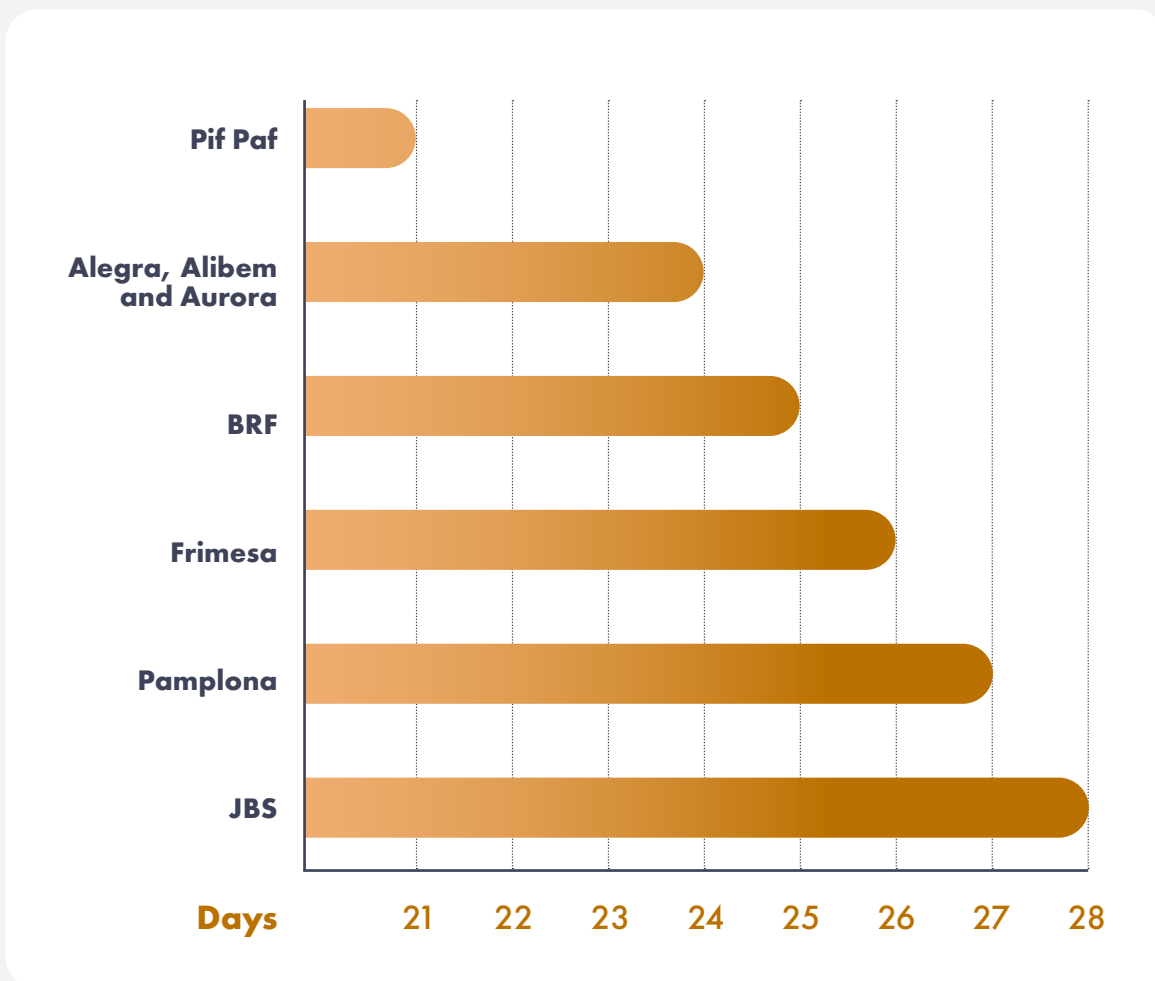
“Currently, we aim to provide the sows in the farrowing phase with the maximum possible comfort, in cages that allow the sows to stand and rest without simultaneously touching both sides of the cage, and without touching the upper and side bars of the cage, as per the requirements of IN 113. However, in the future, we intend to conduct studies to evaluate this improvement process.”

Regarding the average weaning age, IN 113 itself already provides for the sector’s adaptation to at least 24 days of age. However, it sets a timeline that is excessively long for this implementation, until the year 2045.

This parameter deserves attention, as weaning is already a stressful stage due to the separation from the mother, change of environment and food, and mixing with other animals. When done too early, it can harm the development of piglets, posing significant challenges to their health, welfare, and even affecting their behavior. Their digestive and immune systems need to be sufficiently prepared, and it is preferable that they are already socialized before this management.

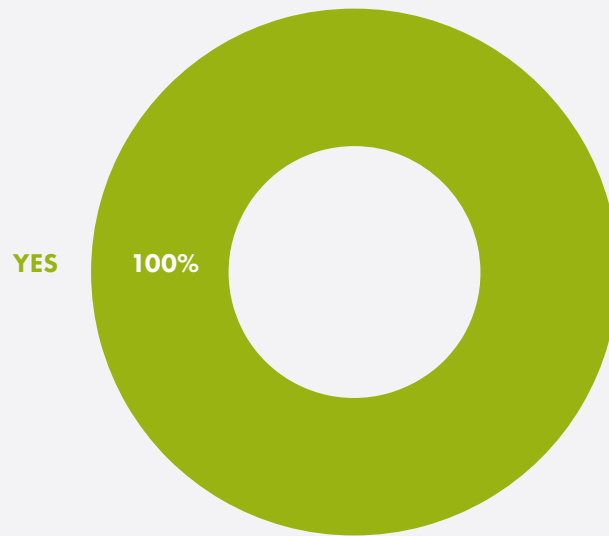
From the responses, only **Pif Paf** recommends a weaning period of less than 24 days.

? What is the average **WEANING** age of the piglets set by the company?



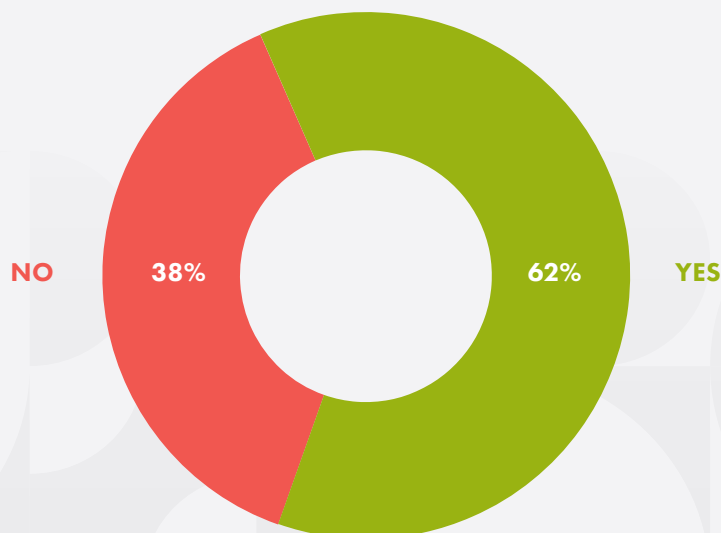
Moving on to the management of piglets, which is commonly addressed in the Pig Watch, a positive development was observed regarding the castration of male pigs. All companies confirmed that they have already banned the surgical method without pain control. Until the 2023 edition, only **Alegria** had not yet eliminated the procedure. Committed to the 2025 deadline, the company has managed to complete it ahead of schedule. Considering that IN 113 mandates the requirement starting from 2030, it is very positive to witness 100% of these suppliers already meeting the target.

? Has the company already banned the surgical **CASTRATION** of male piglets without anesthesia?



The practice of teeth grinding shows more instability. **Alegra, Aurora, and Frimesa** responded that they have not banned the procedure, whereas **Alegra** had stated in the previous year that they had ceased it. On the other hand, **Frimesa** has set a deadline to ban the practice by 2025.

? Has the company already banned the **TEETH GRINDING**?





Alegra Foods



Aurora Coop

“We will follow the recommendations of Normative Instruction 113, meaning this procedure will only be carried out in cases of extreme necessity (injuries to the sows’ mammary system or injuries to the piglets’ faces). Additionally, it will be limited to the tips of the canine teeth, using specific equipment and always under the guidance of the veterinary team.”



Frimesa

“Teeth grinding is performed only in cases of injuries to the sows’ mammary system. We have already conducted tests in farms experiencing this issue, and the sows do indeed suffer significant injuries. We are investigating the potential causes, as most farms do not perform teeth grinding and do not encounter such injuries, while others resort to it due to problems, particularly with first-parity sows.”



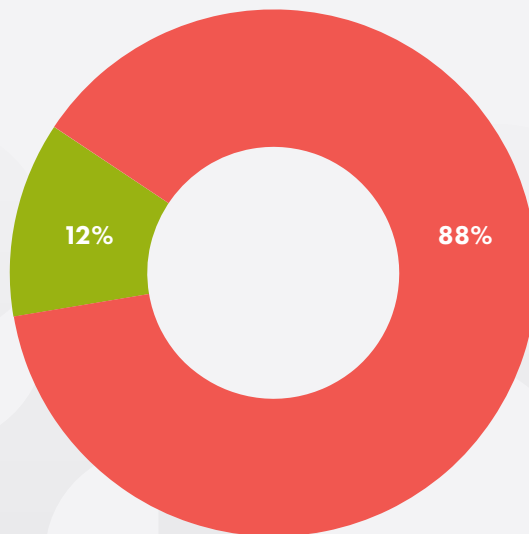
Has the company already banned **EAR NOTCHING**?

YES

12%

88%

NO



The practice of ear notching showed similar results to the previous edition, with only **BRF** reporting the complete elimination of this procedure as a means of animal identification. Despite not reporting any challenges, **Pamplona** maintains its deadline for eliminating ear notching by 2026, the same as **Frimesa**, while **Pif Paf** has set a deadline of 2024. Meanwhile, **JBS**, which had previously brought its deadline forward to 2027, indicated in this edition that it no longer has a defined deadline. It is worth noting that IN 113 establishes 2030 as the deadline to eliminate this practice, a date also adopted by **Alegra, Alibem, and Aurora.**”



“Difficulty in finding an effective and viable method.”



“The available identification alternatives (ear tags, tattoos, and microchips) are being evaluated. However, their feasibility is influenced by factors such as the pain caused during application, the potential loss of identification over the animal’s lifetime, material costs, and the management of ear tissue post-identification (in cases of disposal).”

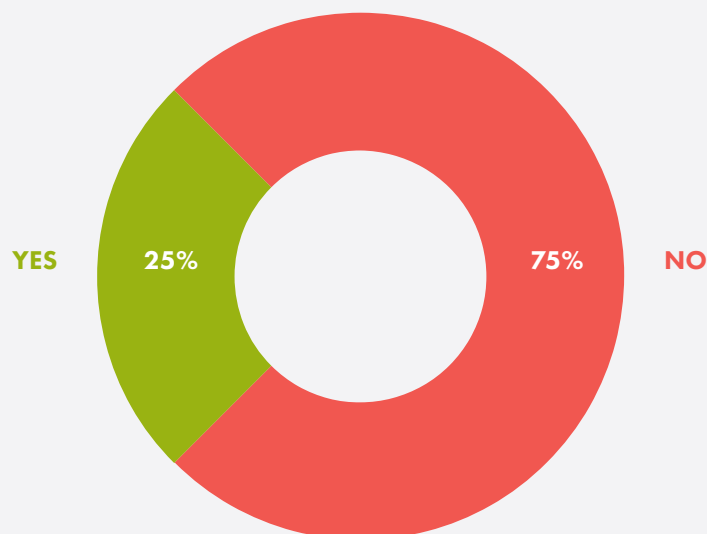


JBS Brasil (Seara)

“Difficulty in finding alternatives that ensure process traceability.”



Does the company intend to ban TAIL DOCKING?



Lastly, tail docking is the most complex practice to be eliminated due to the persistent biting behavior among piglets. Only **BRF** and **Frimesa** intend to ban it, although without a set deadline. Similarly to teeth grinding, **Alegra** had mentioned last year that it also intended to abolish this practice, but now it has joined **Aurora**, which will simply comply with IN 113.

Regarding the reasons why suppliers do not intend to eliminate tail docking, all cited the lack of viable alternatives, with the majority (62%) also reporting previous negative or unsuccessful experiences and productivity losses.



“One reason for not banning tail docking is the increase in carcass condemnations at slaughterhouses. Even in enriched environments, following technical guidelines, cases of tail biting among pigs continue to emerge and worsen, negatively impacting animal welfare due to the injury caused and the potential consequences of infection, as well as the inflicted pain. Therefore, the company recommends tail docking for piglets according to the guidelines set forth by IN 113.”



Alegra Foods



Aurora Coop

“Banning tail docking may lead to animal welfare issues, such as the occurrence of tail biting and injuries among the animals, resulting in reduced weight gain and productivity losses. We do not ban tail docking because we follow the recommendations of IN 113, ensuring that the procedure is carried out only on the last third of the tail and within the first three days of the piglets’ life. We also adhere to the technical procedures recognized by the World Organization for Animal Health’s Sanitary Code.”



BRF S.A.
(Sadia and Perdigão)

“Difficulties regarding the increased occurrence of tail biting, leading to higher mortality and a greater number of animals with severe injuries, particularly during the nursery phase. Tail biting is associated with multiple factors, such as environment, poor living conditions, and stocking density. However, despite extensive implementation of environmental enrichment and density adjustments, these measures have not yet been sufficient to curb cases of tail biting. By 2025, the use of analgesics for tail docking will be implemented, and environmental enrichment will be applied in 100% of the pens.”



Frimesa

“Many challenges have been encountered in banning tail docking. We implemented this ban on some newer properties with better structural conditions, appropriate stocking density, and environmental enrichment, and faced a serious problem with tail biting. Animal welfare became extremely compromised due to severe and extensive injuries, with complete tail loss, often accompanied by bleeding, necrosis, and myiasis, as well as animals with multiple abscesses throughout their bodies (joints) and loss of mobility. Several companies in Brazil have joined ABPA in a study group to explore possible solutions to reduce this impact.”

5.2.2 Buyers

For the companies in the buyers group, the topic of farrowing housing and piglet management was asked in a simpler way to understand if they require other pig welfare practices from their suppliers.

Bob's claims to require from its suppliers the end of surgical castration of males without pain control and teeth grinding, requirements that were absent in 2023 and in its animal welfare policy publication.

Carrefour maintains its requirements regarding castration and tail docking, and has also required the use of environmental enrichment since 2022, which was not reported last year.

Dídio Pizza states that it requires the end of farrowing crates, but in addition to not including it in the publication of its commitment, it may have confused it with gestation housing, stating that its supplier is already in line with this requirement.

The same misunderstanding may have been made by **GPA**, which claimed to require the ban on farrowing crates, although this detail does not appear in its public policy, unlike other elements such as the elimination of beta-agonists (such as ractopamine) for its own-brand products and environmental enrichment in various stages of production.



Marfrig, on the other hand, continues to require from its suppliers the immunocastration of males instead of the surgical method, as well as the non-application of tail docking, and the implementation of environmental enrichment with a deadline set for 2028.

? Has the company already required other pig WELFARE PRACTICES from its suppliers?

Company	Ban Surgical Castration Without Anesthesia	Ban Teeth Grinding	Ban Ear Notching	Ban Tail Docking	Deadline
Arcos Dorados (McDonald's)	✗	✗	✗	✗	n/a
Bob's	✓	✓	✗	✗	2025
Carrefour ¹	✓ ²	✗	✓ ³	✗	2025 ² /2022 ³
Dídio Pizza	✗	✗	✗	✓	no deadline
Forno de Minas	✗	✗	✗	✗	n/a
GPA	✓	✗	✓	✓	2028
Marfrig	✓	✗	✓	✗	2026

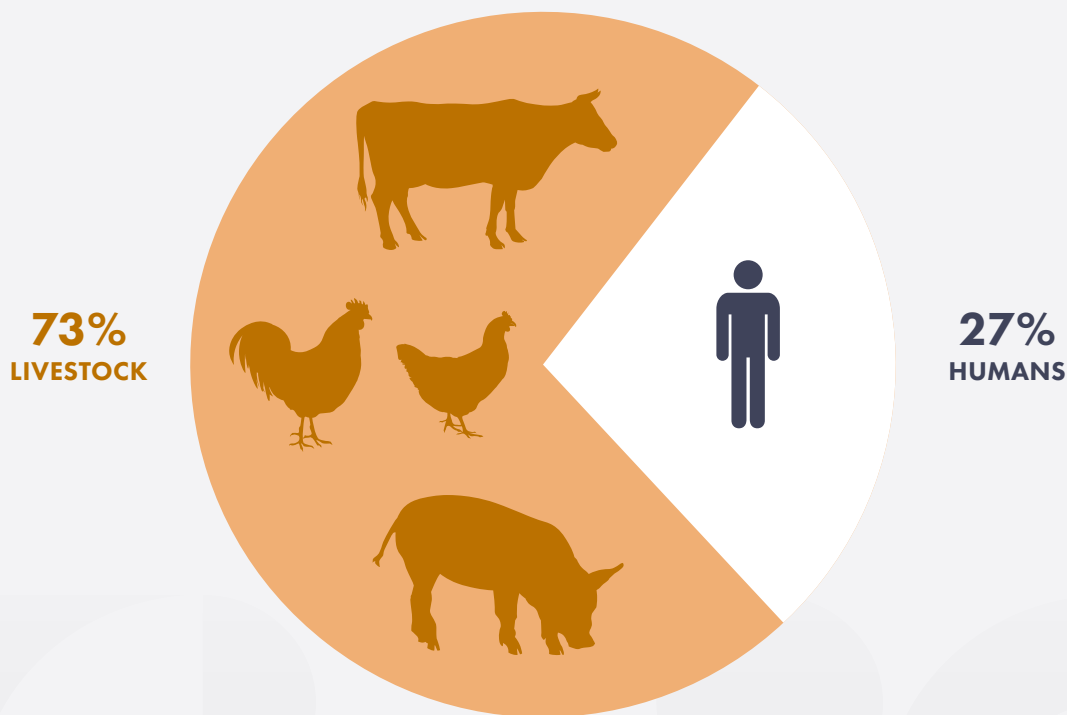
¹Only for *in natura* own-brand meat.

5.3 USE OF ANTIMICROBIALS

In the last section of the Pig Watch questionnaires, the use of antimicrobials in pig farming was addressed, a critical topic in One Health.

Some studies in recent years estimate that 73% of all these drugs sold globally are used in farmed animals³, with a significant portion of the active ingredients also being used in human medicine.

PROPORTION OF GLOBAL ANTIMICROBIAL USE BETWEEN HUMANS AND ANIMALS IN LIVESTOCK



³ Tiseo, K., Huber, L., Gilbert, M., Robinson, T. P., & Van Boeckel, T. P. (2020). Global Trends in Antimicrobial Use in Food Animals from 2017 to 2030. *Antibiotics* (Basel, Switzerland), 9(12), 918. Available at: <<https://doi.org/10.3390/antibiotics9120918>>

In 2013, global consumption of all antimicrobials in farmed animals was estimated at 131,109 tons, and it is projected to reach 200,235 tons by 2030⁴. This massive quantity is due not only to the industrial scale of livestock farming (mainly intensive), but also to the way it has been administered to animals. Billions of animals receive antibiotics as growth promoters and preventively, driven by the sector’s desire to accelerate weight gain and the sanitary challenges imposed by the confinement of a high number of individuals with low genetic variability. This abundant and improper use has been identified as one of the main factors contributing to antimicrobial resistance (AMR), including in humans⁵.

In industrial pig farming, this issue is even more pronounced with the early weaning of piglets, which, as mentioned earlier, undergo a lot of stress from the abrupt changes in their diet and environment, exposure to new pathogens, and fights between newly mixed animals. As a result, many pigs in this phase suffer from diarrhea, which is fatal for many. Therefore, antibiotics are applied to their diet.



4 Van Boeckel, T. P., Glennon, E. E., Chen, D., Gilbert, M., Robinson, T. P., Grenfell, B. T., Levin, S. A., Bonhoeffer, S., & Laxminarayan, R. (2017). Reducing antimicrobial use in food animals. *Science* (New York, N.Y.), 357(6358), 1350–1352. Available at: <<https://doi.org/10.1126/science.aao1495>>

5 Tang, K. L., Caffrey, N. P., Nóbrega, D. B., Cork, S. C., Ronksley, P. E., Barkema, H. W., Polachek, A. J., Ganshorn, H., Sharma, N., Kellner, J. D., & Ghali, W. A. (2017). Restricting the use of antibiotics in food-producing animals and its associations with antibiotic resistance in food-producing animals and human beings: a systematic review and meta-analysis. *The Lancet. Planetary health*, 1(8), e316–e327. Available at: <[https://doi.org/10.1016/S2542-5196\(17\)30141-9](https://doi.org/10.1016/S2542-5196(17)30141-9)>



APPROACHES TO ANTIMICROBIAL USAGE

GROWTH PROMOTER

This is the **most controversial**, since low and constant doses of these drugs are administered through feed, creating an ideal situation for the **selection of pathogens resistant to antimicrobials**. Increased productivity and animal growth are sought by increasing the absorption efficiency of nutrients from the feed. **Its use should be avoided as much as possible**, and the use of different classes of these drugs for this purpose was prohibited by the Ministry of Agriculture and Livestock.

PROPHYLACTIC

Adopted in cases of imminent risk of disease occurrence/outbreaks, for preventive purposes. Most of the time, it also involves the administration of antimicrobials through feed or water, but in much higher doses than growth promoters. Even so, maintaining this use in the medium and long terms **favors the selection of resistant microorganisms and should be avoided**.

METAPHYLACTIC

It involves treating a group of animals after clinical signs appear in some individuals and when there is a risk of spread to others. Provides consequences similar to the prophylactic use.

THERAPEUTIC

It refers to the treatment of already established and diagnosed diseases, which would be the **most correct use** of these medications, preferably administered individually, orally or by injection.

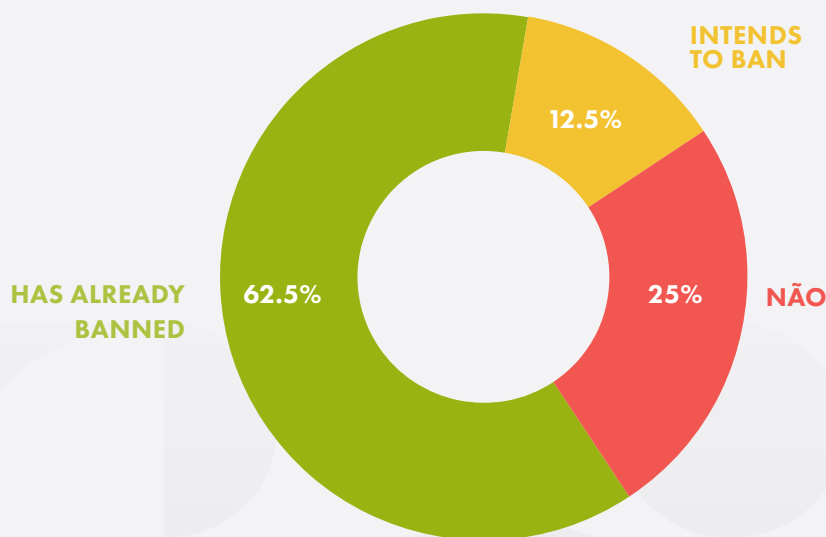


5.3.1 Suppliers

The companies were first questioned about the use of antimicrobials as growth promoters. Although most have already banned this type of medication application, it is concerning that **Alegria**, which had previously expressed the intention to eliminate this use, is now aligned with **Aurora** in continuing to use the most risky form of antibiotics. Both declare that there is a lack of alternatives, an increase in production costs, and productivity losses as reasons to maintain the use.

Furthermore, **Pif Paf** stated that it intends to stop using growth promoters with these drugs, but without a deadline for completion, although it did not report any difficulties in the process.

? Does the company intend to ban or has it already banned the use of antimicrobial as **GROWTH PROMOTERS?**



ALREADY BANNED



Alibem Alimentos



BRF S.A.
(Sadia and Perdigão)



Frimesa



JBS Brasil (Seara)



Pamplona Alimentos S.A.

INTENDS TO BAN



ALIMENTOS

Pif Paf
(no deadline)

IT DOES NOT INTEND TO BAN



Alegra Foods



Aurora Coop



Alegra Foods



Aurora Coop

“We miss products that can replace growth promoters while providing the same levels of efficacy, performance, and health, and that are cost-competitive. We understand that by banning the use of growth promoters, there could be a significant increase in the number of sick animals, associated with low health protection, which could pose a major risk to animal welfare and result in economic losses.”

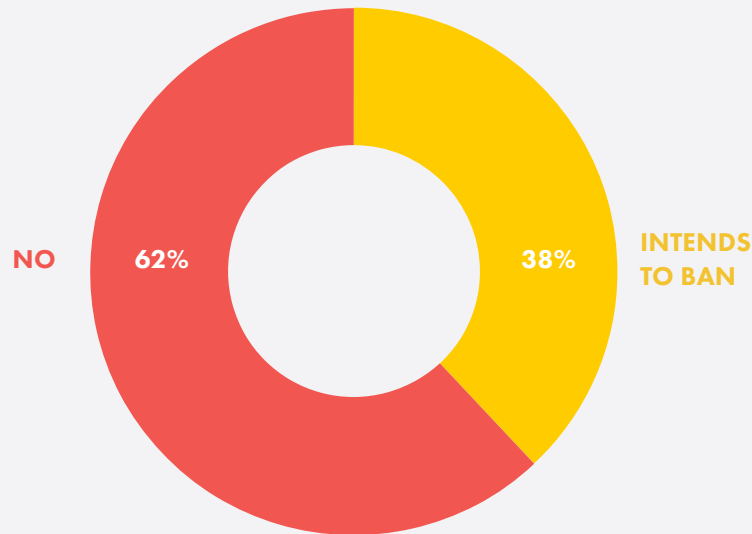
Regarding the preventive use of antibiotics, setbacks are also noticeable, such as **JBS**, which in 2023 declared that it had ceased this practice, and **Alegra**, again aligned with **Aurora**, whereas in the previous edition it intended to ban it. Meanwhile, **BRF** maintains its 2025 deadline.

Pif Paf stated that it intends to stop the preventive use, but again without a timeline for implementation, although it did not report any difficulties in the process.

Among the reasons provided for not abolishing this practice, productivity losses were the most commonly reported (80%), followed by increased costs and production (60%), lack of viable alternatives (40%), and previous negative or unsuccessful experiences (20%).



Does the company intend to ban or has it already banned the **PROPHYLACTIC** use of Antimicrobials?



INTENDS TO BAN



BRF S.A.
(Sadia and Perdigão)
(no deadline)



Frimesa
(no deadline)



ALIMENTOS
Pif Paf
(no deadline)

IT DOES NOT INTEND TO BAN



Alibem Alimentos



Alegra Foods



Aurora Coop



Pamplona Alimentos S.A.



JBS Brasil (Seara)



Alibem Alimentos

“We have faced increased sanitary challenges, mainly respiratory, enteric, and reproductive, with a consequent increase in production losses and high production costs. Studies with eubiotics are being conducted, however, without similar efficacy to the use of antibiotics prophylactically.”



BRF S.A.
(Sadia and Perdigão)

“The high number of infectious agents in pig farming has led to an increase in sanitary challenges, necessitating the return of prophylactic use of antibiotics for short periods and in a targeted manner. Additionally, there are a limited number of alternatives that are effective in combating microorganisms.”



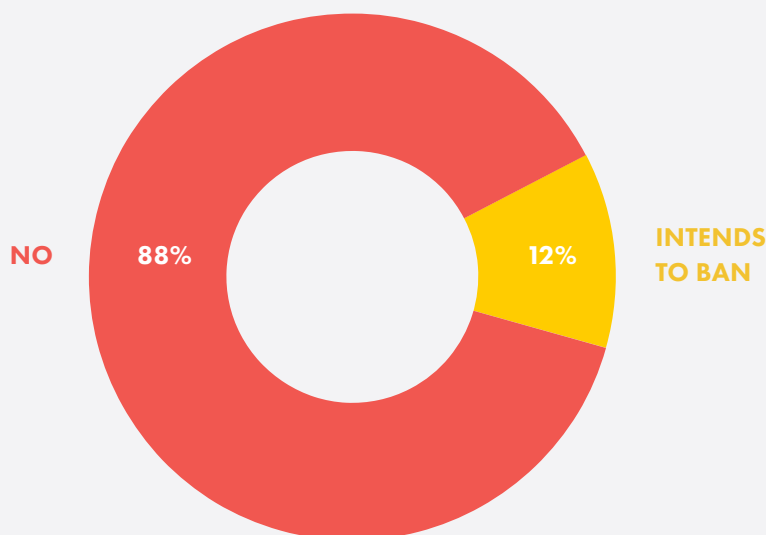
Frimesa

“Our production is located in an area with a high stocking density of pigs, which has increased the pressure of infection from various diseases. Aiming to reduce the impacts on animal welfare and productivity, as animals with compromised health lose their quality of life and reduce their performance, we have been working with the preventive use of antibiotics in certain life stages. However, we are committed to a biosafety project in collaboration with Embrapa, seeking to reduce pathogen entry into the farms so that excessive use of antibiotics is not necessary.”

Regarding the metaphylaxis use, the scenario is also unfavorable. Only **BRF** maintains its intention to discontinue this practice with the same deadline set earlier, in 2027. On the other hand, **Alegra, JBS, and Pamplona**, which had declared the same intention, have now joined **Aurora**.

When asked about the reasons for not banning the metaphylaxis use, 71% of the companies reported production losses, and 43% cited sanitary insecurity, lack of viable alternatives, and increased production costs, in addition to 29% who had negative or unsuccessful experiences.

? Does the company intend to ban or has it already banned the **METAPHYLACTIC** use of Antimicrobials?



INTENDS TO BAN



BRF S.A.
(Sadia and Perdigão)
(2027)

IT DOES NOT INTEND TO BAN



Alibem Alimentos



Alegra Foods



Aurora Coop



JBS Brasil
(Seara)



Frimesa



Pamplona Alimentos S.A.



ALIMENTOS

Pif Paf



Alibem Alimentos

“There is difficulty in controlling or even eradicating diseases among animals when metaphylactic use is not carried out.”



BRF S.A.
(Sadia and Perdigão)

“In addition to the reasons mentioned regarding the difficulties in banning prophylactic use, banning metaphylactic use is even more challenging, since pigs are raised in groups in the same environment and under the same management conditions. In the presence of sick animals in the facility, pathogens are already present in the environment, triggering clinical symptoms in different stages, making control and elimination more difficult.”



ALIMENTOS

Pif Paf

“We understand that the use of metaphylactic antibiotics is very important for animal health, as it helps prevent the spread of infectious diseases, reduces morbidity and mortality, and protects vulnerable animals. Additionally, it prevents secondary infections and contributes to the overall well-being of the animals. It is important to use these antibiotics responsibly to avoid antimicrobial resistance and ensure the effectiveness of treatment.”

In order to better understand how suppliers are addressing the reduction in the use of antimicrobials, the alternatives adopted by producers were explored.

All companies stated that they already use alternatives to antimicrobials. Sharing experiences and exchanging knowledge about the use of these products is crucial to driving the reduction of antimicrobial use as growth promoters, prophylaxis, and metaphylaxis.



Alegra Foods

- Eubiotics
- Minerals



Alibem Alimentos

- Eubiotics
- Vaccines
- Herd separation in sanitary pyramids



Aurora Coop

- Eubiotics
- Minerals



BRF S.A.
(Sadia and Perdigão)

- Eubiotics (exogenous enzymes)
- Nutraceuticals (synthetic amino acids)
- Minerals
- Raw material and feed quality control plan
- liquid energy system, and digestible amino acids in diet formulation

Frimesa

Frimesa

- Eubiotics (herbal)
- Minerals

JBS

JBS Brasil (Seara)

- Eubiotics

Pamplona

Pamplona
Alimentos S.A.

- Eubiotics

Pif Paf

ALIMENTOS

Pif Paf

- Eubiotics



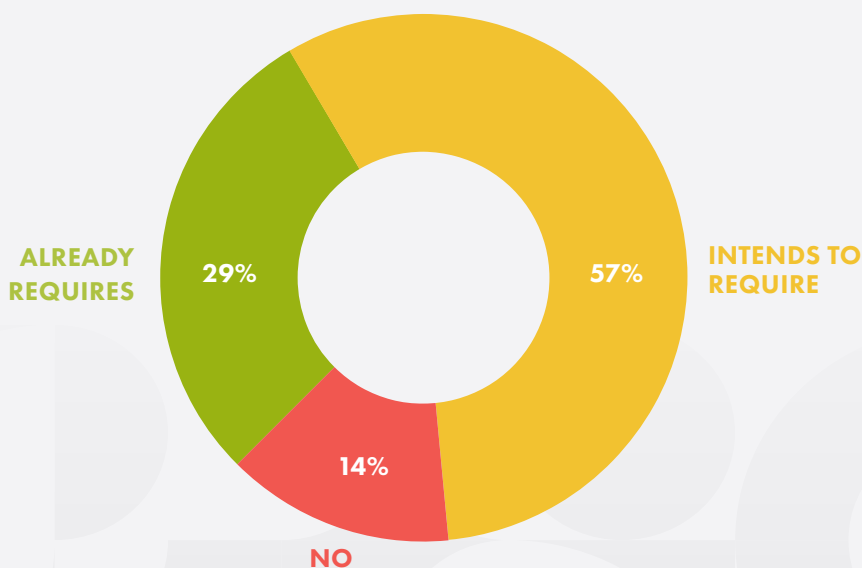
5.3.2 Buyers

Lastly, we addressed the buyer companies more briefly about how they have been handling the issue with their suppliers of pork meat.

Marfrig has stated since last year that it already requires the end of non-therapeutic antibiotic use. However, this is not clear in their public sustainability reports, where they only mention that the company is committed to not using high-risk antibiotics in the raising of animals, especially cattle, their main production chain.

Similarly, **Forno de Minas** maintained its response with a deadline until 2029, although it is not mentioned in their animal welfare policy, which is important for communicating with their suppliers and customers.”

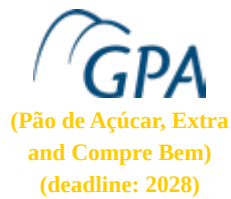
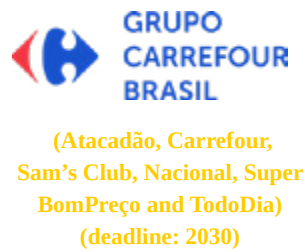
? Does the company already require or intend to require its suppliers to **END THE NON-THERAPEUTIC USE OF ANTIMICROBIALS?**



ALREADY REQUIRES



INTENDS TO REQUIRE



DOES NOT INTEND TO REQUIRE



Dídio Pizza

Although not directly linked to pig farming, it is very important that buyer companies take a stance on this issue, which strongly impacts One Health.

6. CONCLUSIONS

Four years after its first edition, the Pig Watch demonstrates the importance of monitoring the evolution of corporate commitments to animal welfare in pig farming, **with the participation of all the supplier companies approached.**

Over these years, this report highlights that the main challenge faced by producers is the **low availability of financing options to invest in facility infrastructure.** Smaller producers with older buildings deserve more attention from the sector, as they are more vulnerable to the economic risks involved and face more physical limitations when it comes to expanding these facilities.

Through discussions with representatives from these companies, it is also evident that the most recent properties are typically the hardest to adapt to the demands, which slows down the pace of commitment transition. Given that the first deadlines of 2025 and 2026 set by some of these suppliers are approaching, **it remains questionable whether they will actually be able to complete the process within the stipulated time.**

On a deeper level, it was positive to observe that most of these companies intend to transition to the **pre-implantation system**, with the goal of housing sows in individual stalls for as little time as possible. However, the testimonies indicate significant obstacles to adaptation, such as production losses and the need for more physical space.

Another positive aspect highlighted in this edition was that almost half of the participating suppliers expressed the intention to provide **more physical space for sows in the farrowing phase**, considering the fragility of this production stage, and acknowledging that this improvement is not even foreseen in IN 113. Additionally, 90% of these companies are already compliant with, or even exceed, the requirements of this regulation regarding **the average weaning age of piglets**, and for the first time, **100% stated that they no longer perform surgical castration of males without the use of analgesics or anesthetics.**

In contrast, other routine practices in the farrowing phase **have not** evolved significantly, such as the **abolition of teeth grinding, tail docking, and ear notching** (the latter being included in IN 113). Likewise, **the use of anti-microbials** has not reduced significantly, remaining a systemic challenge to reconcile the maintenance of animal health with the mitigation of the negative impacts of improper use of these drugs in the context of One Health.

Regarding the companies in the buyers group, this year's report received far fewer responses, indicating a **lack of commitment and transparency**. Animal welfare commitments should not be used as “humane-washing” tools in corporate marketing strategies, misleading consumers.

From the responses of the participating buyer companies, a concern arises about their representatives' understanding of certain aspects of pig farming, such as the difference between gestation and farrowing housing. If they claim to require other animal welfare demands, **these requirements must be clearly outlined in their respective public commitments**, ensuring clear communication with their suppliers.

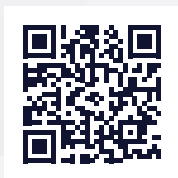
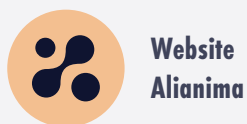
A repeatedly mentioned issue in the Pig Watch is the need to implement an efficient traceability system, so that committed companies can be aware of the origin and characteristics of the products they purchase. By ensuring this information, client companies can have more confidence in their institutional sustainability policies, with support from the supply chain. This way, companies can even enhance their commitments, as demonstrated by **Carrefour Brasil Group**, which has expanded its commitment to include processed meats from its own brand, or by **Arcos Dorados**, which is redefining a deadline to complete its transition.

Finally, Alianima once again thanks the participating companies. This continued dedication demonstrates **seriousness in their commitment and transparency** with consumers.

7. CONTACT

Join this great movement for animals!

If your company would like to obtain additional information about our work or clarify specific questions related to animal welfare, please contact us through the following channels:



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REALIZATION



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