



pig watch

2025 | 6th EDITION



Image: Kallerna, Wikimedia Commons



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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 complimentary technical support to companies committed to improving the conditions of animals, assisting them in implementing sustainable and animal welfare practices.

We rely on a specialized technical team, whose actions and materials are all grounded in technical and scientific data. Our goal is to foster an industry that is more attentive to and concerned about animal suffering, and to promote better-informed consumers regarding the origin of their food, encouraging critical and conscious consumption.

Learn more about our work at alianima.org/en

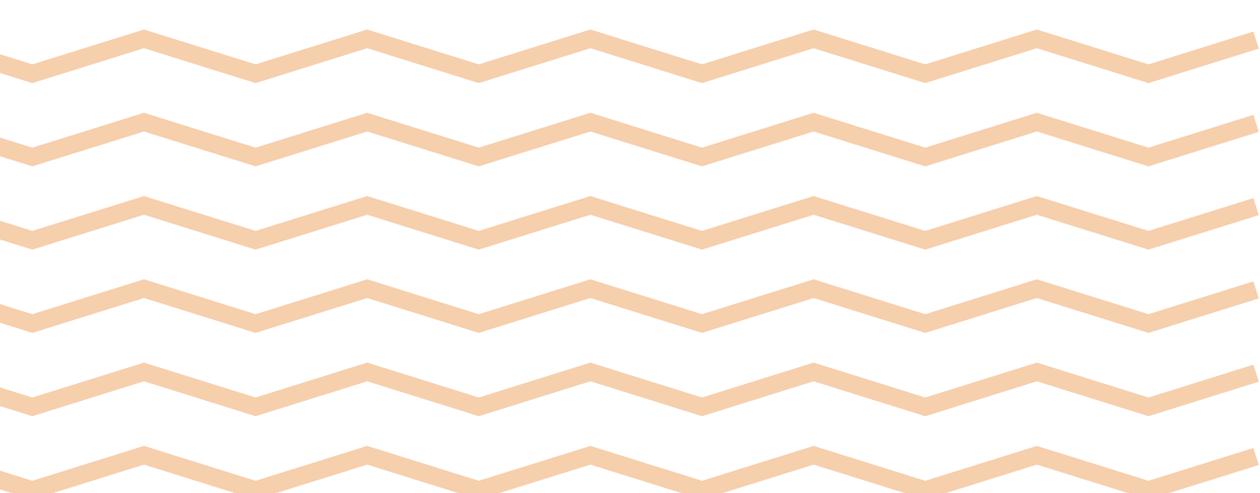


2. ABOUT ANIMAL WATCH

Animal Watch is a platform developed by Alianima to increase transparency regarding public commitments made by companies in the food and hospitality sectors in Brazil related to animal welfare, facilitating their monitoring by civil society, and ensuring that such commitments are effectively fulfilled.

In addition, the platform also provides information and news about our activities and about the reality of the food production chain, highlighting the industry's role in promoting significant changes in how animals are treated — aiming to encourage more critical consumption, greater corporate responsibility, and to stimulate concrete progress in promoting animal welfare in the country.

Access at observatorioanimal.com.br/en



2.1 ABOUT PIG WATCH

Pig Watch, the annual report produced by Alianima, reaches its sixth edition in 2025, consolidating itself as the primary tool for monitoring and transparency of pig welfare policies in the sector.

This year, the questionnaires were improved, becoming an essential instrument not only to track the progress of public commitments to eliminate gestation crates, but also to highlight the adoption of best practices in the Brazilian pig industry.

As in every year, the publication of results encourages transparency between the food industry and consumers and contributes to identifying the sector's main challenges. This enables understanding of the factors that hinder an effective transition, supports companies committed to meeting established deadlines, and provides technical assistance grounded in Alianima's expertise in animal welfare.

Since its first edition in 2020, Pig Watch has received broad participation from contacted companies and attracted the interest of national media. Over the years, consistent progress has been observed in group housing for breeding females, as well as in other best practices for pig welfare across different production stages. Nevertheless, Alianima reiterates the importance of corporate transparency and responsibility to ensure the transition is ethical, effective, and in line with the principles of animal welfare and One Health.

Access: observatoriosuino.com.br/en



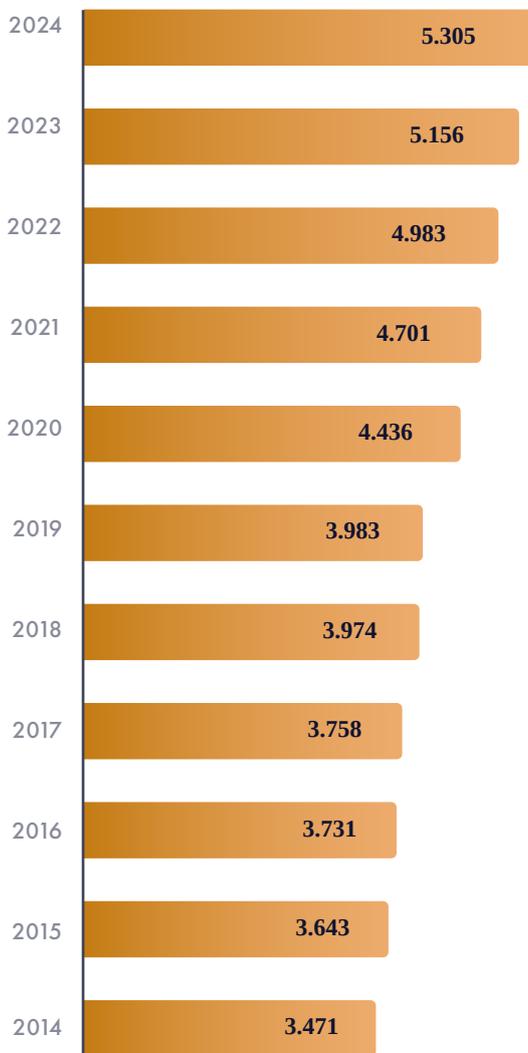
Image: Kallerna, Wikimedia Commons

3. OVERVIEW OF BRAZILIAN PIG FARMING

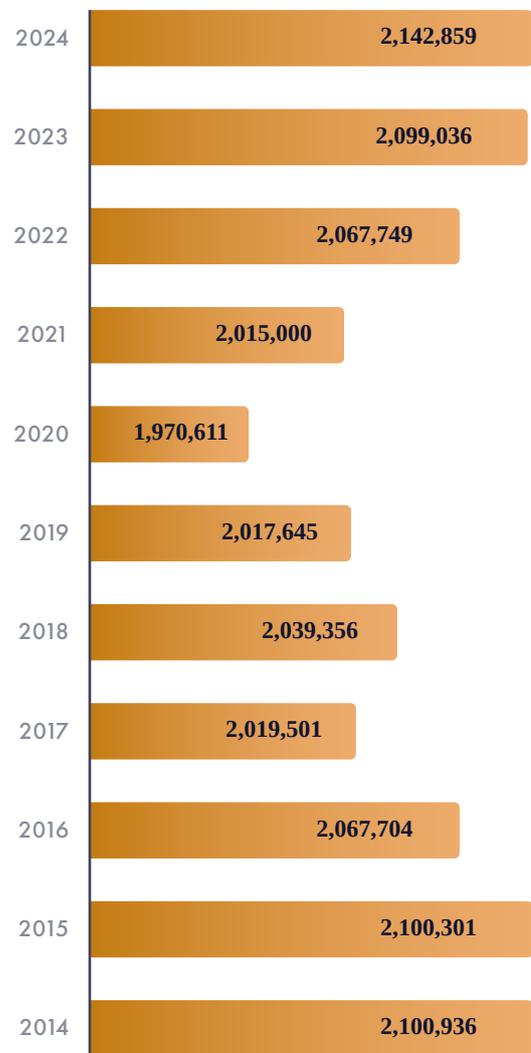
Brazilian pig farming remains primarily composed of integrated producers, as well as processing and exporting companies that play a central role in the production chain. In this context, the implementation of animal welfare best practices is consolidated not only as an ethical commitment regarding the animals' quality of life but also as a competitive advantage for Brazil in the global market.

In 2024, Brazil produced 5.3 million tons of pork, with 46.6 million animals slaughtered and 2.1 million active breeding sows. Production increased by 2.9% compared to the previous year and by a more significant 52.8% over the last decade.

BRAZILIAN PORK PRODUCTION (MILLION TONS)



ACTIVE BREEDING SOWS (HEADCOUNT)



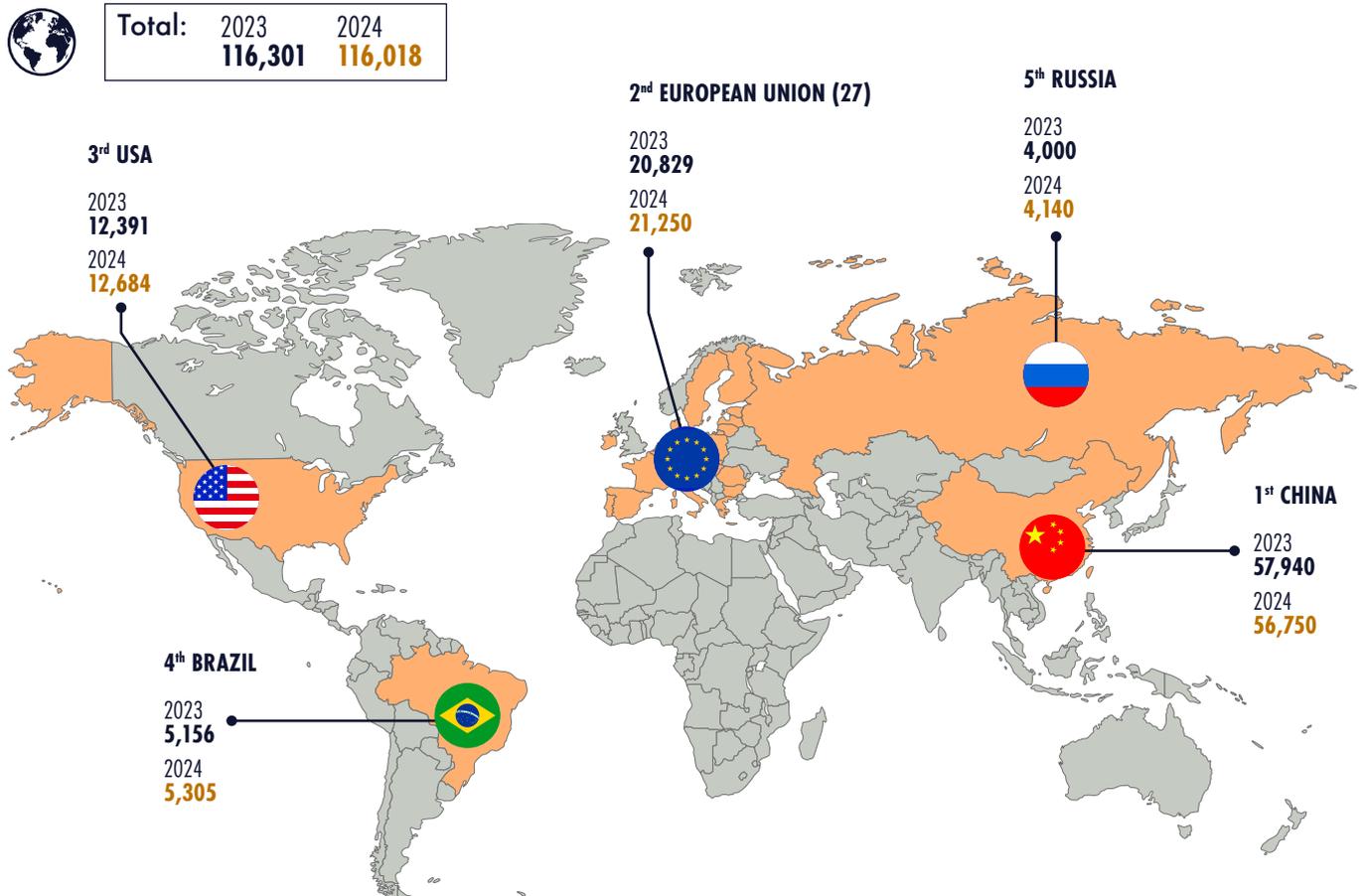
Source: ABPA

1. 2025 Annual Report of the Brazilian Association of Animal Protein (ABPA). Available at: <https://abpa-br.org/wp-content/uploads/2025/04/ABPA.-Relatorio-Anual-2025.pdf>

The numbers confirm Brazil's position, once again, as the fourth largest producer and exporter of pork in the world, behind only China, the European Union, and the United States. Interestingly, the country has held the fourth position in the global ranking since at least 2015².

GLOBAL PORK PRODUCTION (THOUSAND TONS)

PRODUCTION



Total:	2023	2024
	116,301	116,018

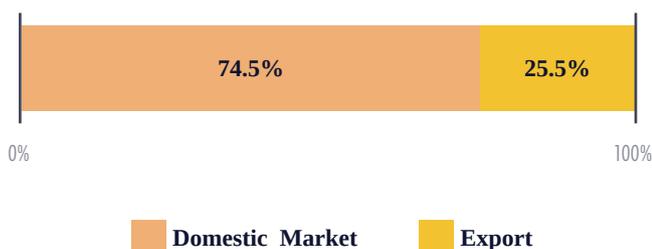
Others:	2023	2024
	15,985	15,889

Source: USDA / ABPA

Exports	2023	2024
USA	3,095	3,244
European Union (27)	3,125	3,000
Canada	1,327	1,440
Brazil	1,230	1,353
Chile	263	265
Others	1,052	1,011

2. Brazilian Association of Animal Protein (ABPA) Annual Reports, 2015–2024. Available at: <https://abpa-br.org/abpa-relatorio-anual/>

DESTINATION OF BRAZILIAN PORK PRODUCTION IN 2024



Approximately one-quarter of the pork production was exported. In 2024, Brazil exported to 94 different markets — four more than in 2023 — reaching all five continents. Asia once again stood out as the leading importer of Brazilian pork, accounting for 63.8% of total exports, mainly to the Philippines, China, Hong Kong, Japan, and Singapore, which together purchased 774,939 tons³.

Regarding pig welfare, it is important to note that, in the global regulatory context, the use of gestation crates is completely banned in countries such as Norway, Sweden, Switzerland, the United Kingdom, and New Zealand (which will complete its transition in 2025), as well as in 11 U.S. states: Arizona, California, Colorado, Florida, Maine, Massachusetts, Michigan, New Jersey, Ohio, Oregon, and Rhode Island⁴. In the European Union, the practice has been prohibited since 2013, being allowed only during the first 28 days after insemination.

In Brazil, the Normative Instruction No. 113/2020⁵, in force since 2021, established guidelines for good handling practices and animal welfare in pig farms, including the use of gestation crates for no more than 35 days after

insemination. Even though legal deadlines are extensive, several national companies and cooperatives have stood out for adopting more ambitious commitments, providing for the elimination of gestation crates between 2025 and 2031⁶. This stance demonstrates leadership and reinforces the sector's role in aligning with consumer and global market demands, consolidating animal welfare as part of the future of Brazilian pig farming.



MAIN GUIDELINES OF THE NORMATIVE TEXT INCLUDE:

- **Restrictions on the use of gestation crates for up to 35 days starting in January 2045.**
- **Mandatory use of analgesia and anesthesia in all surgical castration procedures starting in January 2030.**
- **Restrictions on tail docking, which may be tolerated when only the final third of the tail is removed, and with procedures that minimize pain and health implications for the animals.**
- **Prohibition of ear notching starting in January 2030.**
- **Prohibition of teeth clipping, with grinding permitted only when necessary.**
- **Weaning of piglets at an average age of 24 days or older, starting in January 2045.**
- **Prohibition of electric prods and aggressive handling practices.**
- **Mandatory access to environmental enrichment.**

3. 2025 Annual Report of the Brazilian Association of Animal Protein (ABPA).

Available at: <https://abpa-br.org/wp-content/uploads/2025/04/ABPA.-Relatorio-Anual-2025.pdf>

4. Farm Animals Confinement Bans by State - ASPCA.

Available at: <https://www.aspc.org/improving-laws-animals/public-policy/farm-animal-confinement-bans>

5. NI 113/2020 – Ministry of Agriculture and Livestock (MAPA)

6. Animal Watch.

Available at: <https://observatorioanimal.com.br/compromissos/suinos-livres-de-celas-de-gestacao/>

4. METHODOLOGY

The sixth edition of Pig Watch follows the same methodology established in previous editions, utilizing two distinct questionnaires: one for pork producers (suppliers) and another for buyers, including restaurant chains and supermarkets.

All companies operating in Brazil that, by the end of 2024, had publicly committed to eliminating the use of gestation crates were invited to participate. The questionnaires were sent by email in August 2025, and companies were given one month to submit their responses. Companies that did not respond to the questionnaire were listed as “non-respondents.”

In May of this year, the merger between **BRF S.A.** and **Marfrig Global Foods S.A.** was officially completed, resulting in the creation of **MBRF**. The company responded to this edition through a single supplier questionnaire.

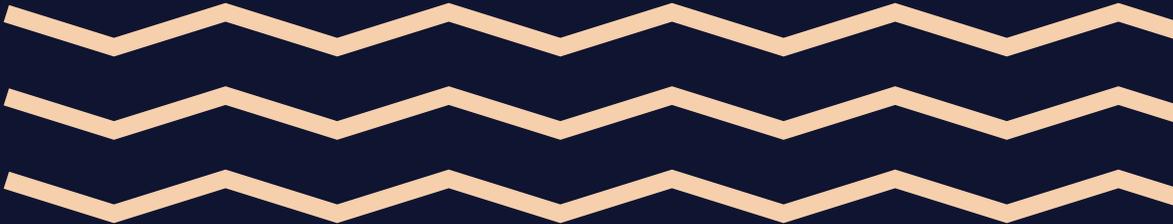
Quitanda, part of Grupo Raízes, holds a partial commitment adopted in 2024 and is the only brand within the group committed to pig welfare. Although its commitment does not cover the entire supply chain, the company was included in this edition of Pig Watch due to its established dialogue with the initiative.

Grupo Carrefour Brasil, which, since 2020, has maintained a pig welfare policy only for its private-label fresh meat line (Sabor & Qualidade), remains included in this edition due to its relevance in the sector and history of transparent dialogue, **even though its commitment has not undergone the desirable updates since the previous edition.**

Below is the list of companies contacted, categorized by sector and organized in alphabetical order with their respective deadlines:

SUPPLIERS	DEADLINES
Alegria Foods 	2029
Alibem Alimentos 	2031
Aurora Coop 	2026
Frimesa 	2026
JBS Brasil (Seara Alimentos) 	2025
Master Agroindustrial* 	2031
MBRF 	2026
Pamplona Alimentos S.A. 	2026
Pif Paf Alimentos 	2029

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

 <p>Antaris Food Brands (Johnny Rockets, Dickey's Barbecue Pit, Boulangerie Carioca) Deadline: 2026</p>	 <p>Arcos Dorados (McDonald's) No Deadline</p>	 <p>B.Lem Padaria Portuguesa Deadline: 2026</p>	 <p>Bob's (BFFC) Deadline: 2025</p>	 <p>Bloomin' Brands (Outback Steakhouse, Aussie) Deadline: 2029</p>
 <p>Burger King (Zamp) Deadline: 2025</p>	 <p>Casa do Pão de Queijo Deadline: 2026</p>	 <p>Ciao Pizzeria Napoletana Deadline: 2025</p>	 <p>Dídio Pizza (San Marzan) Deadline: 2026</p>	 <p>Divino Fogão Deadline: 2029</p>
 <p>Forno de Minas Indústria de Alimentos (McCain) Deadline: 2029</p>	 <p>GPA (Pão de Açúcar, Extra) Deadline: 2028</p>	 <p>Grupo Carrefour Brasil (Carrefour, Atacadão) Deadline: 2022</p>	 <p>Grupo Dia Deadline: 2028</p>	 <p>Grupo Madero Deadline: 2027</p>
 <p>Grupo Marche Deadline: 2028</p>	 <p>Grupo Trigo (Spoleto, Koni Store, LeBonTon, Gurumê, Gendai, China in Box) Deadline: 2025</p>	 <p>Habib's Deadline: 2026</p>	 <p>Halipar (Grietto, Montana Grill, Jin Jin, Croasonho) Deadline: 2025</p>	 <p>Hippo Supermercados Deadline: 2026</p>
 <p>Hotel Unique Deadline: 2026</p>	 <p>Mercadinhos São Luiz* Deadline: 2031</p>	 <p>Monster Dog Deadline: 2026</p>	 <p>Quitanda (Grupo Raízes)* Deadline: 2027</p>	 <p>Subway Deadline: 2025</p>
 <p>UnidaSul Deadline: 2026</p>				

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

✓ SUPPLIER QUESTIONNAIRE:

- Proportion of breeding sows housed in groups during gestation.
- Period during which breeding sows remain in crates after insemination.
- Experience with the pre-implantation system.
- Plans to provide more space and environmental enrichment for breeding sows in the farrowing phase.
- Average weaning age of piglets.
- Implementation of best practices in piglets handling, including the end of surgical castration without anesthesia, teeth grinding, tail docking, and ear notching.
- Use of antimicrobials as growth promoters, metaphylaxis, and prophylaxis.
- Use of ractopamine.
- Transparency with buyers regarding pork supply from group-housed animals.
- Challenges faced in transitioning to group housing, improving piglet management, and reducing antimicrobial use.

✓ BUYER QUESTIONNAIRE:

- Percentage of pork purchased from suppliers that maintain breeding sows in group housing.
- Availability of information from suppliers on the proportion of products purchased exclusively from farms using group housing systems.
- Companies' inclination to require additional pig welfare practices from suppliers, including ending the use of antimicrobials for non-therapeutic purposes.
- Difficulties encountered in obtaining pork from crate-free suppliers.

All contacted companies were aware of Pig Watch's transparency policy and, therefore, consented to the publication of results on the Animal Watch platform.



Image: Saharalyn, Wikimedia Commons

BUYERS' RANKING

Approximately 25% of buyer commitments have 2025 as their target year for full implementation, yet most of those companies have not publicly reported their progress. In addition, irregularities have been identified over recent years of monitoring—such as the **absence of deadlines, incomplete coverage of operations or supply chains, and partial commitments**—which can hinder the expected advances.

For that reason, a classification and ranking of these companies was carried out for the first time to highlight these inconsistencies, so they can be corrected as soon as possible.

Scores for the ranking were assigned to each company according to the following table:



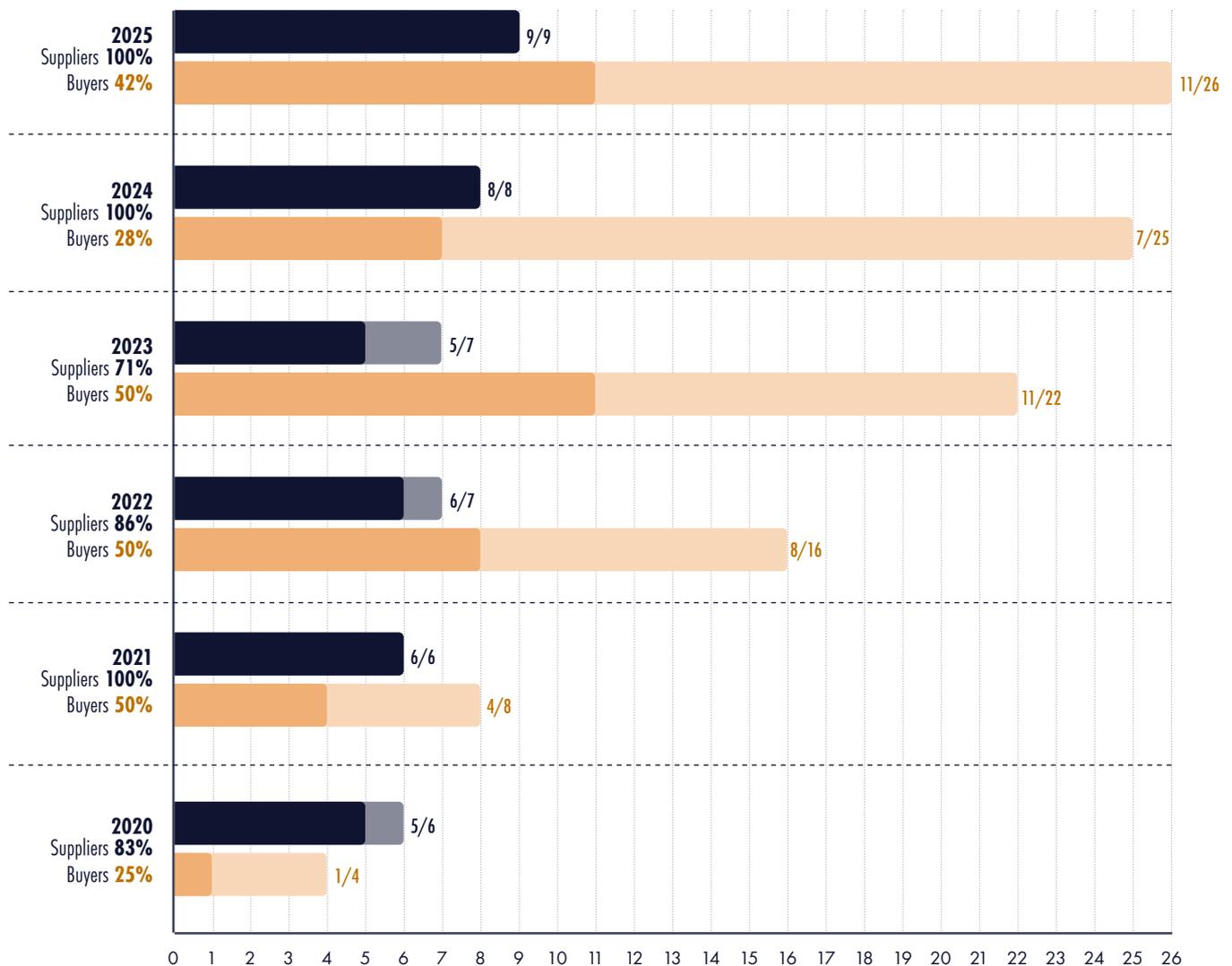
CRITERION EVALUATED	SCORE
Position in Transparency Ranking	<ul style="list-style-type: none"> • Responded to all possible editions: 130 • Responded to the latest edition but not to all: 100 • Did not respond only to the latest edition: 90 • Did not respond to the two latest editions: 30 • Never responded: 0
Current percentage of transition achieved	• 2 points per percentage point achieved
Public and accessible commitment	<ul style="list-style-type: none"> • No: 0 • Yes: 100
Scope of the commitment	Partial (only some products/brands): 50 Full (all operations): 150
Has or plans to have public commitments on other pig-welfare practices	No: 0 Yes: 100
Maximum total possible score	680 points

Companies with higher scores rank better, demonstrating greater transparency and engagement with their announced pig-welfare commitments.

5. RESULTS

5.1 RESPONSE RATES

DISTRIBUTION OF PARTICIPATING COMPANIES BY SECTOR AND YEAR



HIGHLIGHTS:

- Of the **35 companies surveyed**, 20 responded (57.1%), a 6.1% increase from the previous edition.
- For the second consecutive year, Pig Watch obtained a **100% response rate from the supplier group**.
- The buyers' group response rate **increased by 14 percentage points**, although it **remained below 50%**.
- Since the first edition of Pig Watch, there has been a significant increase in the number of companies with public commitments: **25 new commitments in 5 years**, 88% of which belong to the buyers' group.

5.2 TRANSPARENCY RANKING

SUPPLIERS

 (Responded to all possible editions)



ALIBEM

(JBS)
(Seara and Swift)

master

MBRF

(Marfrig, Perdigão and Sadia)



 (Did not respond to all editions)



Frimesa

PifPaf

 (Never responded)

BUYERS

 (Responded to all possible editions)



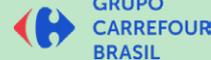
(San Marzan)



(McCain)



(Pão de Açúcar, Extra)



(Carrefour, Atacadão)



(Grupo Raízes)

 (Responded to the latest edition but not to all)



(Johnny Rockets, Dickey's Barbecue Pit, Boulangerie Carioca)



(McDonald's)



(Casa do Pão de Queijo)



(Grilletto, Montana Grill, Jin Jin, Croasonho)



 (Did not respond only to the latest edition) **Bob's**
(BFFC)

 (Did not respond to the last two editions)



 (Never responded)



(Outback Steakhouse, Aussie)



(Zamp)



(Spoleto, Koni Store, LeBonTon, Gurumê, Gendai, China in Box)



5.3 GESTATION HOUSING

SUPPLIERS: DOES YOUR COMPANY PROVIDE SPECIFIC INFORMATION ON THE PORTION OF PORK THAT COMES FROM CRATE-FREE FARMS TO EACH OF YOUR REQUESTING BUYERS?

BUYERS: DO YOUR COMPANY'S SUPPLIER(S) PROVIDE INFORMATION ON THE PORTION OF PORK THAT COMES FROM CRATE-FREE FARMS, IF REQUESTED?

	ANSWERED YES	ANSWERED NO
SUPPLIERS	<ul style="list-style-type: none"> • Alegria Foods • Alibem Alimentos • Aurora Coop • Frimesa • JBS Brasil (Seara Alimentos) • Master Agroindustrial • MBRF • Pamplona Alimentos • Pif Paf Alimentos 	
BUYERS	<ul style="list-style-type: none"> • Arcos Dorados (McDonald's) • Casa do Pão de Queijo • GPA • Grupo Carrefour Brasil • Halipar • Hotel Unique • Quitanda 	<ul style="list-style-type: none"> • Dídio Pizza

DID NOT REQUEST INFORMATION FROM SUPPLIERS:

• Hippo • Forno de Minas • Antaris Food Brands

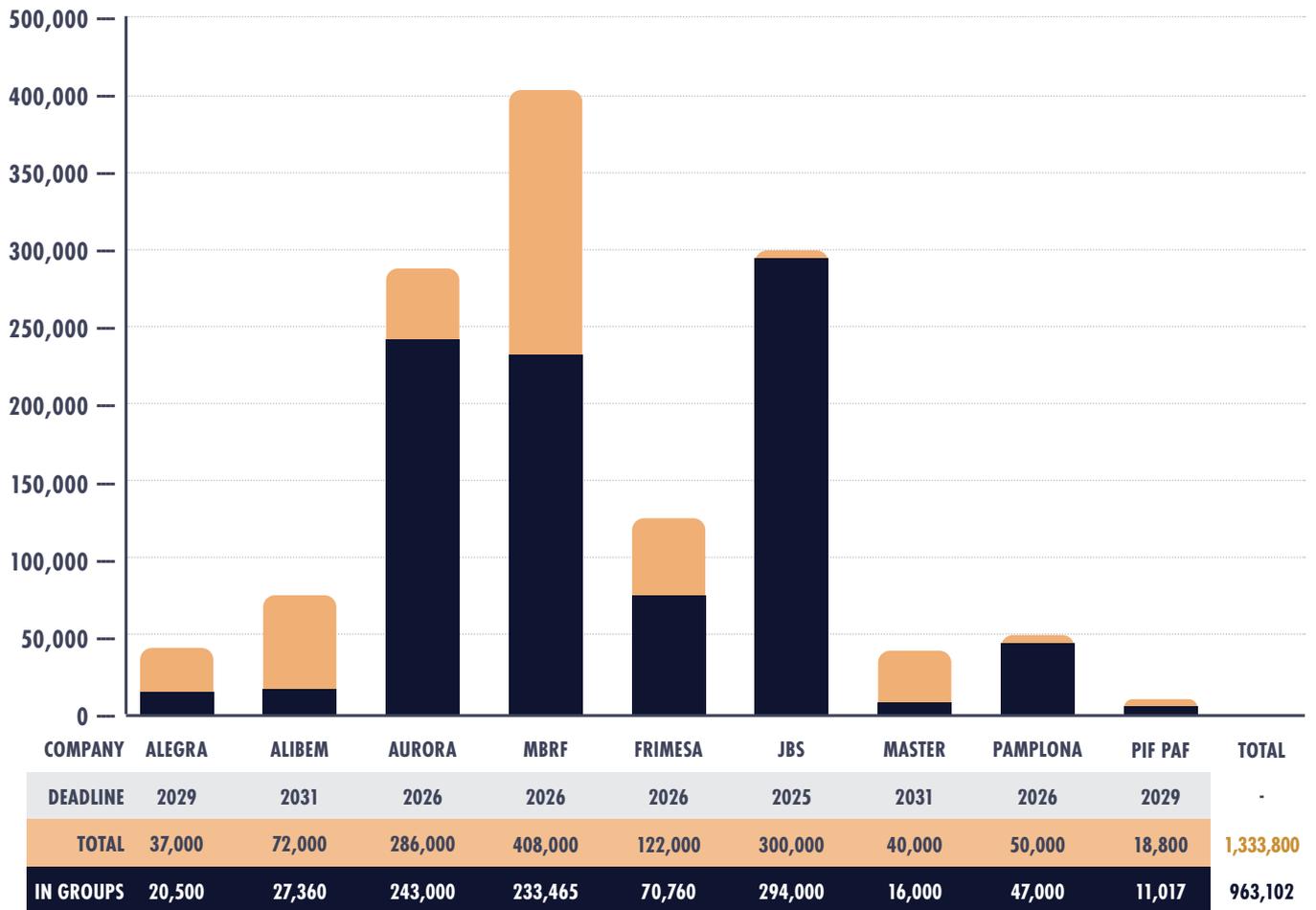


HIGHLIGHTS:

- Buyers **must** be informed about the origin of the product purchased, as they are committed to no longer using pork that comes from farms that house sows in gestation crates.
- Only **Dídio Pizza** reported, for the second year in a row, that it was unable to receive a response. **Suppliers must provide this information.**
- 100% of suppliers have always stated that they can provide the information to buyers.
- For buyers who claim they are unable to obtain information or have not requested it from their suppliers, the question remains as to **how they estimated their respective reported transition percentage** (item 5.3.2).

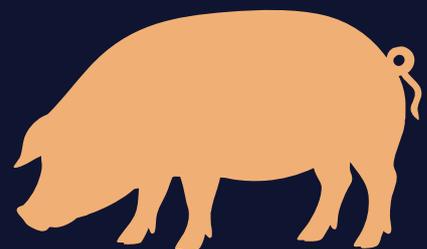
5.3.1 Suppliers

PROPORTION OF SOWS HOUSED IN GROUPS AMONG THE TOTAL OF EACH COMPANY

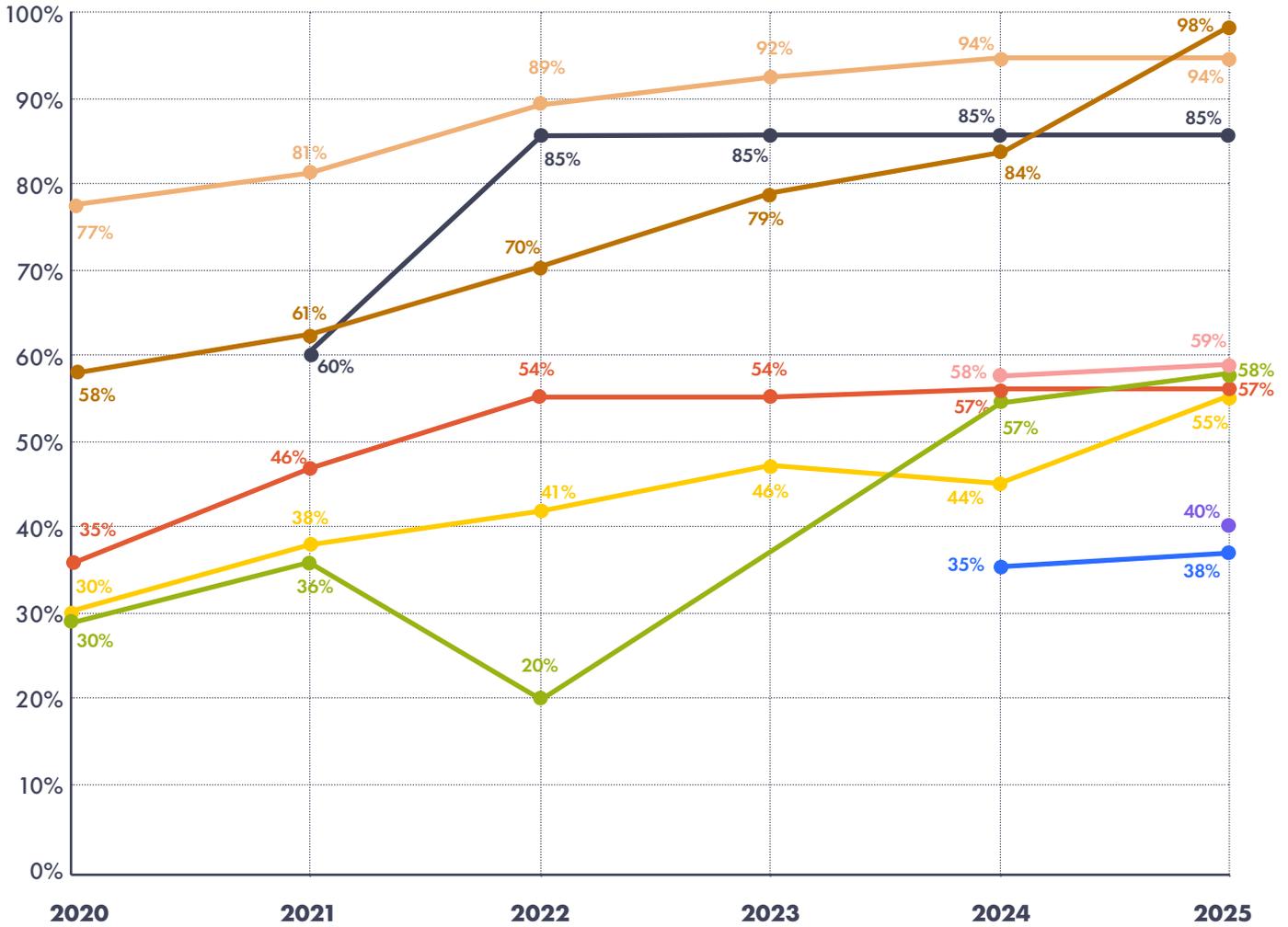


HIGHLIGHTS:

- Considering the number of active sows housed in Brazil, according to the latest annual report from ABPA, the total number of sows reported by committed suppliers represents **62.2% of the national herd**.
- **JBS (Seara)** has a deadline by the end of 2025, and all indications suggest that it will complete its transition on time or shortly thereafter.
- **Alibem** and **Master** had a lower proportion of sows housed in groups, but published their commitments more recently (2023 and 2024, respectively), leaving them with a longer deadline to complete their transitions (2031).
- As in the last edition, **MBRF** houses a significantly larger number of sows than **JBS** and **Aurora**; however, the latter still has fewer sows housed in groups.
- **Pamplona** presents an advanced transition, potentially reaching 100% within its 2026 deadline.



PERCENTAGE OF SOWS HOUSED IN GROUPS BY COMPANY AND YEAR



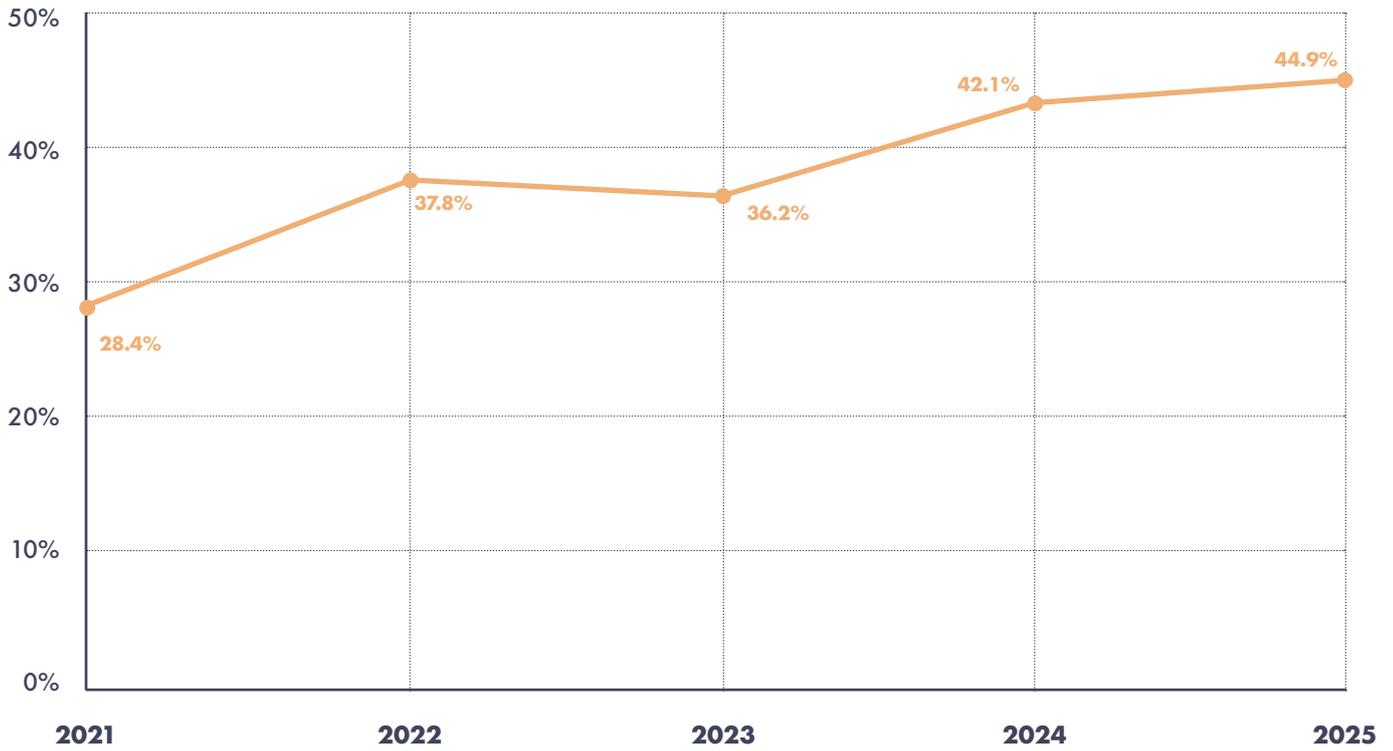
• ALEGRIA • ALIBEM • AURORA • MBRF • MASTER • FRIMESA • JBS • PAMPLONA • PIF PAF



HIGHLIGHTS:

- **JBS** increased its year-to-year carryover by 14 percentage points, reaching 98%, in time for its 2025 deadline.
- **Alegria** ranked second in percentage progress, with an 11 percentage point increase, despite a slight decline in the previous edition.
- **Aurora** and **MBRF** have a 2026 deadline, but have not made any progress over the past years.
- **Frimesa** has the same 2026 deadline, but has made some progress, although it does not appear to be enough to complete the transition by next year.

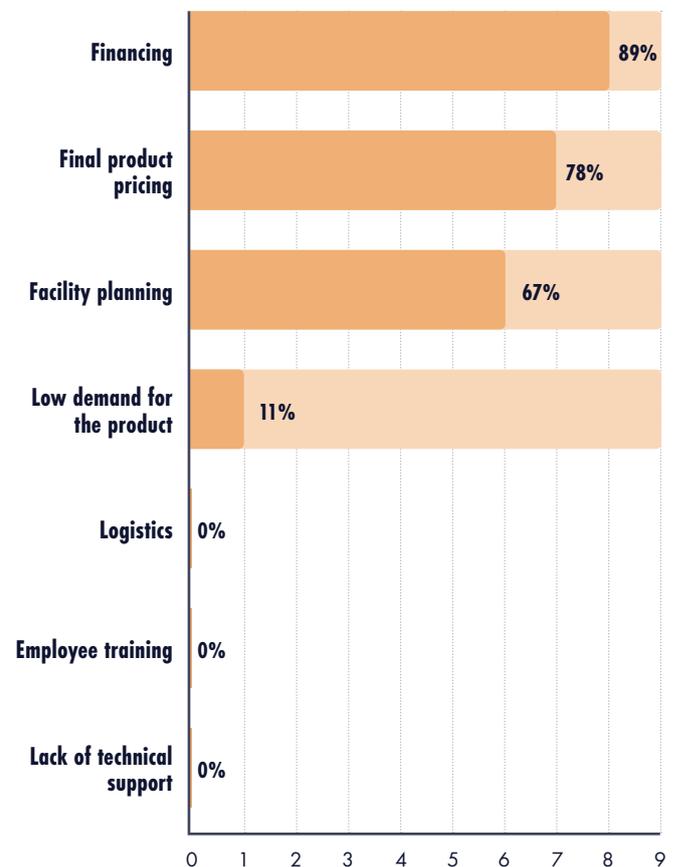
ESTIMATED PERCENTAGE OF SOWS HOUSED IN GROUPS IN BRAZIL PER YEAR



HIGHLIGHTS:

- The values in the graph are estimates based on the number of active sows housed in Brazil, as reported by ABPA in its annual report.
- Compared with last year, the Brazil-wide increase was only 2.8 percentage points.
- There was a significant 16.5% increase in sow group housing over the last four years.

? HAS THE COMPANY ENCOUNTERED DIFFICULTIES IN PROCEEDING WITH THE TRANSITION TO GROUP HOUSING?



- For the third consecutive year, **Pamplona** experienced no difficulties in transitioning to group housing.
- Unlike last year, producers did not mark lack of technical support as a difficulty, reflecting a possible search for knowledge and learning.
- Financing remains, as in previous years, the main difficulty encountered by almost all respondents.
- This year, more participants reported challenges, with pricing of the final product (from 4 to 7 companies) and facility planning (from 3 to 6 companies) being the most frequently mentioned, following financing (from 6 to 8 companies).

MBRF



(Marfrig, Perdigão and Sadia)

“The challenges associated with the transition from individual to group housing of sows have remained constant over the years. In addition to the already widely recognized challenges, it is essential to consider that most farms were originally designed for individual housing. Converting them to a crate-free model requires significant investments in infrastructure, management, and equipment, which is often not economically viable or can directly impact farm operations and efficiency. Each project requires practical and customized solutions that take into account regional specificities and the economic conditions of producers.”

ALIBEM

“The company is continuing its migration to group housing, as outlined in its public commitment. However, the high investment costs for farm adaptations, limited credit lines, project complexity, and high interest rates are ultimately slowing down the process.”

(JBS)

(Seara and Swift)

“The reduction in the number of females directly impacts the income of families involved in the activity, impacting the conditions for economic sustainability and the retention of the number of people on the property.”



**AURORA
COOP**

“Significant investments are needed from producers, through financing from credit institutions for the construction of new facilities and for the adaptation of structures already built.”



? WHAT IS THE HOUSING PERIOD OF PREGNANT SOWS KEPT IN CRATES BEFORE BEING MOVED TO GROUP HOUSING?

Company	Up to 7 days (pre-implantation)	28 days	35 days	Does the company have a public commitment to reduce this period to up to 7 days (pre-implantation)?
Alegria	26.8%	0%	73.2%	Yes. for new facilities
Alibem	0%	0%	100%	Yes. for new facilities
Aurora	0%	0%	100%	Yes. for new facilities
Frimesa	4.2%	0%	95.8%	No
JBS	54.1%	8.5%	37.4%	Yes. for new facilities
Master	0%	100%	0%	No
MBRF	7.3%	92.7%	0%	Yes. for new facilities
Pamplona	63.8%	0%	36.2%	Yes. for new facilities
Pif Paf	46.9%	26.8%	26.3%	No



HIGHLIGHTS:

PRE-IMPLANTATION:

- From last year to this year, **Alegria, Frimesa,** and **Pamplona** were the only companies that increased the percentage of sows in the pre-implantation system.
- **Aurora, Master,** and **Alibem** do not have the system.
- Unfortunately, all the remaining companies maintained or reduced the number of sows in the pre-implantation system.
- **Pamplona** and **JBS** remain the only companies that have more than half of their herd housed in this system.

28 DAYS:

- All of the sows housed in groups by **Master** are kept in individual crates for the first 28 days of gestation.
- **MBRF** has more than 50% of its herd kept in crates for 28 days.

35 DAYS:

- All of the sows housed in groups by **Alibem** and **Aurora** are kept in individual crates for the first 35 days of gestation.
- **MBRF** does not have any sows housed in crates for 35 days.

Last year, companies were asked whether they intended to reduce the time sows are kept in crates by adopting the pre-implantation system. Only three companies (**Alegra**, **Aurora**, and **Pif Paf**) said they did not intend to. This year, the question was more concrete: whether the company has a public commitment to the pre-implantation system.



HIGHLIGHTS:

- 67% of companies have made public commitments to ensure that all new facilities are adapted to pre-implantation systems.
- The language regarding **Aurora/Alegra's** pre-implantation commitment is not yet available in the "Our Commitments" section of the company's website. This section should be updated to ensure greater transparency.
- Unfortunately, **Frimesa**, **Master**, and **Pif Paf** have not yet made any commitments regarding pre-implantation systems. **Frimesa**, in the previous edition, indicated its intention to do so, but backtracked in its response in this edition.



"We comply with current legislation."



"At this time, we have no plans for new projects, and for this reason, we do not have this commitment."



"We work with five different pork suppliers (Copacol, Copagril, Lar, C.Vale, and Primato), and we've seen them react to the potential reduced productivity [with pre-implantation systems]. Therefore, we're moving forward first with data collection and visits to those who already have a well-implemented pre-implantation system, so we can later determine what deadline we can meet in our public commitment."

? HAS THE COMPANY EXPERIENCED ANY ADVANTAGES AND/OR DISADVANTAGES WITH THE PRE-IMPLANTATION SYSTEM?

The companies' responses were similar to last year's, with reproductive losses, fighting, difficulty maintaining adequate body condition scores, higher implementation costs, and the need for more space cited as disadvantages. Regarding the advantages, animal welfare, physical and mental health of the animals were the most cited, along with improved breeding stock performance.



Have no experience with pre-implantation systems.



Advantages: “No”.

Disadvantages: “No”.



Advantages: “No”.

Disadvantages: “Difficulty in keeping females within the ideal body score and identifying sick females early, which can cause an increase in female mortality.”



Advantages: “No”.

Disadvantages: “The farms in our group are quite old, so productivity has been severely compromised by pre-implantation systems. We’re looking to learn about the experiences of those who have had success with pre-implantation systems.”



Advantages: “Improvement in stereotypes, animal behavior, volume of water consumed, zootechnical performance, and the occurrence of urogenital infections.”

Disadvantages: “Greater need for space to allocate structures on rural properties and space to allocate sheds.”



(Marfrig, Perdigão and Sadia)

Advantages: “By allowing greater freedom of movement and social interaction, this model helps reduce chronic stress, improves sow behavior, and encourages the expression of natural behaviors. With the appropriate use of monitoring and management technologies, it is possible to maintain production efficiency while meeting the animals’ needs.”

Disadvantages: “The need for more physical space is a challenge for properties with limited infrastructure, requiring significant investments in adaptations. Management also becomes more complex, as competition between sows can lead to differences in body condition scores and compromised productive performance. Furthermore, monitoring individual sows - especially regarding health and return to estrus (heat) - becomes more difficult, requiring more skilled labor. Despite the previously mapped challenges, our experience with the model has already reduced the gaps in productive results, enabling the consolidation of the system.”

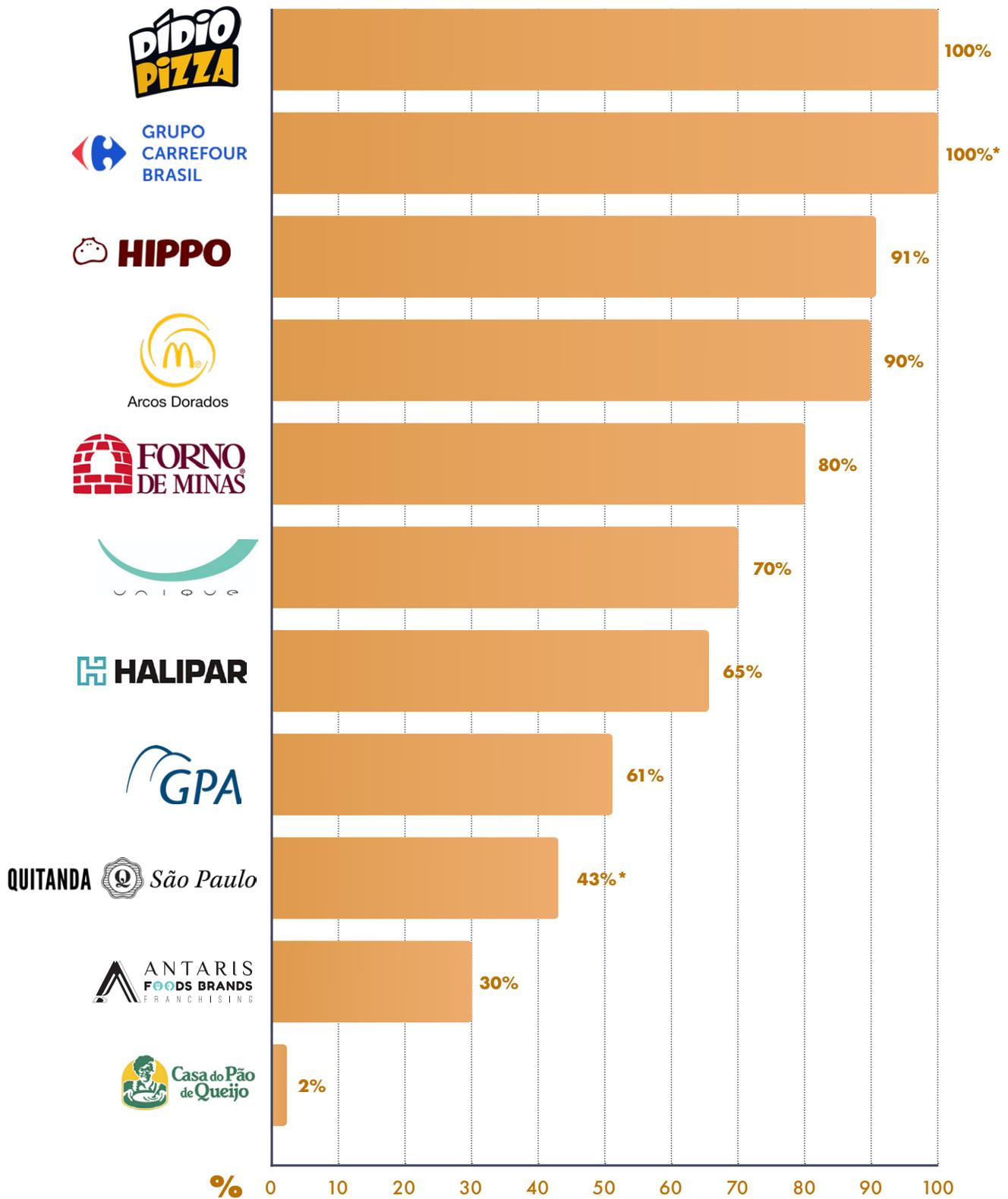


Advantages: “Improved animal welfare, with displays of natural behaviors.”

Disadvantages: “Space, embryonic losses, behavioral problems, costs of adapting facilities, production, and new facilities.”

5.3.2 Buyers

? WHAT PERCENTAGE OF PORK IN YOUR SUPPLY CHAIN COMES FROM CRATE-FREE SYSTEMS



*Partial commitment

Company	Deadline	2023	2024	2025
Antaris Food Brands	2026	-	No report	30%
Arcos Dorados	No deadline	58%	60%	90%
B.Lem Padaria Portuguesa	2026	5%	Stopped reporting	
Bob's	2025	61%	73%	No report
Bloomin' Brands	2029	⚠ NEVER REPORTED		
Burger King	2025	⚠ NEVER REPORTED		
Carrefour	2022	100%*	100%*	100%*
Casa do Pão de Queijo	2026	No report		2%
Ciao Pizzeria Napoletana	2025	⚠ NEVER REPORTED		
DIA	2028	Unknown to the company	Stopped reporting	
Dídio Pizza	2026	100%	100%	100%
Divino Fogão	2029	-	NEVER REPORTED	
Forno de Minas	2029	54%	56%	80%
GPA	2028	59%	65%	61%
Grupo Trigo	2025	⚠ NEVER REPORTED		
Habib's	2026	-	⚠ NEVER REPORTED	
Halipar	2025	No report		65%
Hippo	2026	60%	No report	91%
Hotel Unique	2026	61%	No report	70%
Madero	2027	⚠ NEVER REPORTED		
Mercadinhos São Luiz	2031	-	No report	
Monster Dog	2026	⚠ NEVER REPORTED		
Quitanda	2026	-	43%*	
St. Marche	2028	⚠ NEVER REPORTED		
Subway	2025	⚠ NEVER REPORTED		
UnidaSul	2026	⚠ NEVER REPORTED		

- Not committed at the time

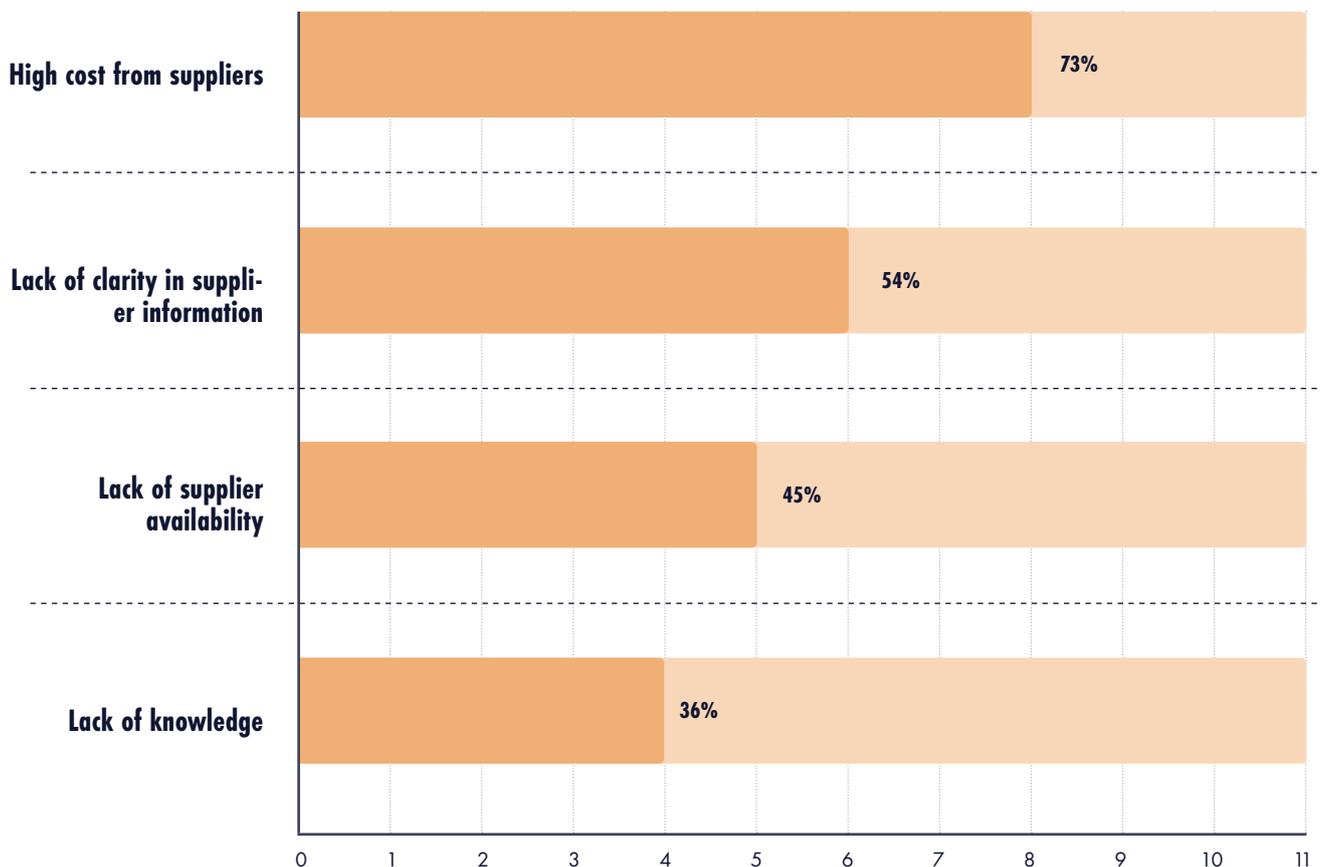
*Partial commitment



HIGHLIGHTS:

- **Dídio Pizza** maintained 100%, but this is questionable, as it reported not having obtained information from its supplier(s).
- **Carrefour** also maintained 100%, despite being a partial commitment, only for private-label fresh meat.
- **Hippo** and **Forno de Minas** reported increases of 31 and 24 percentage points, respectively, but raised doubts by reporting that they had not requested information from suppliers.
- **Arcos Dorados** continues to report and show good progress (30%) year-over-year, despite not having a public commitment.
- **Hippo** increased by 31% and **Hotel Unique** by 10% over the past two years.
- **GPA** was the only company to decrease its transition percentage, falling from 65 to 61% since the last edition.
- 42% of committed companies **NEVER** reported any transition status. Despite the 2% drop in the number of companies that did not respond since last year, the situation is **CONCERNING** due to the lack of transparency from buyers and the approaching deadline.
- Four buyers responded to the questionnaire for the first time: **Antaris Foods Franchising, Casa do Pão de Queijo, Halipar, and Quitanda.**

? HAS THE COMPANY ENCOUNTERED DIFFICULTIES IN OBTAINING CRATE-FREE PRODUCTS?





HIGHLIGHTS:

- This year, **Casa do Pão de Queijo** was the only company not to report difficulties in making the transition, but reported very little progress since committing in 2022.
- The high cost of the product remains, for another year, the primary difficulty encountered by most buyers, followed by a lack of clarity in information and a shortage of suppliers.



Arcos Dorados
(McDonald's)

“High cost, difficulty in obtaining financing for the facilities’ adjustments, carrying out renovations on farms that are already in operation, and low product pricing.”



(Atacadão, Carrefour, and Sam's Club)

“The transition to crate-free farms represents a complex challenge for producers, involving economic, technical, and management aspects. One of these is the financial investment to replace individual crates with group housing, which requires significant renovations to the facilities, including flooring adaptations and movable partitions, that will directly impact production costs and the final product. Furthermore, managing sows in groups requires separating the animals by size, temperament, or gestation stage to reduce fighting and stress, and also requires a dedicated team for constant supervision. The adaptation period of sows in groups can affect their nutrition and health, and consequently, lead to a drop in pregnancy and embryonic mortality rates. In Brazil, we are unaware of any suppliers that meet the requirement of having 100% crate-free sows throughout gestation. We are aware of suppliers that are committed and conducting tests to reduce crate time, but they face productivity challenges.”



(Pão de Açúcar and Extra)

“There’s a lack of stakeholders committed to animal welfare in the pork supply chain. This scenario generates price competition, hindering the competitiveness of those investing in more ethical and sustainable production models, and discouraging suppliers from investing in the transition to pig production that incorporates welfare criteria.”

5.3.2.1 Buyers Ranking

Ranking	Company	Score
1	Dídio Pizza (San Marzan)	680
2	Forno de Minas	640
3	HIPPO Supermercados	632
4	GPA	602
5	Grupo Carrefour Brasil	580
6	Arcos Dorados (McDonald's)	530
7	Hotel Unique	490
8	Halipar	480
9	Quitanda	466
10	Antaris Food Brands	410
11	Bob's (BFFC)	386
12	Casa do Pão de Queijo	354
13	B.LEM Padaria Portuguesa	280
	Grupo Dia	280
14	Bloomin' Brands (Outback Steakhouse)	250
	Ciao Pizzeria Napoletana	250
	Grupo Madero	250
	Grupo Trigo	250
	Habib's	250
	Mercadinhos São Luiz	250
	Burger King (Zamp)	250
	St Marche	250
	UnidaSul	250
15	Divino Fogão	150
	Monster Dog	150
	Subway (Zamp)	150



ALERTS!



**GRUPO
CARREFOUR
BRASIL**

- Carrefour did not rank higher due to the partial scope of its commitment.



Arcos Dorados

- Arcos Dorados (McDonald's) did not rank higher because it lacks a public commitment (accessible and with a deadline).

Bob's

- Bob's (BFFC) failed to respond for the first time, with its deadline expiring in 2025, and removed the commitment from public access, ranking 11th place.



TRIGO



SUBWAY

- Ciao Pizzeria Napoletana, Grupo Trigo, Burger King (Zamp) and Subway (Zamp) have 2025 deadlines and HAVE NEVER REPORTED ANY PROGRESS.



- B.Lem Padaria Portuguesa has a 2026 deadline and has failed to report for two editions.

HABIB'S



UnidaSul Distribuidora Alimentícia S.A.

- Habib's, Monster Dog and UnidaSul have 2026 deadlines and HAVE NEVER REPORTED ANY PROGRESS.

The items evaluated for each company in the **ranking composition** can be seen in the table below:

COMPANY	% TRANSITION 2025	SCOPE OF THE COMMITMENT	COMMITMENT PUBLICLY AVAILABLE	TRANSPARENCY RANKING	OTHER PIG WELFARE POINTS
Didio Pizza (San Marzan)	100	Full	✓	●	✓
Forno de Minas	80	Full	✓	●	✓
Hippo Supermercados	91	Full	✓	●	✓
GPA	61	Full	✓	●	✓
Grupo Carrefour Brasil	100	Partial	✓	●	✓
Arcos Dorados	90	Full	✗	●	✓
Hotel Unique	70	Partial	✓	●	✓
Halipar	65	Full	✗	●	✓
Quitanda	43	Partial	✓	●	✓
Antaris Food Brands	30	Full	✗	●	✓
BFFC (Bob's)	73*	Full	✗	●	✗
Casa do Pão de Queijo	2	Full	✓	●	✗
B.LEM Padaria Portuguesa	No Report	Full	✓	●	✗
Grupo Dia	No Report	Full	✓	●	✗
Bloomin' Brands	No Report	Full	✓	●	✗
Ciao Pizzeria Napoletana	No Report	Full	✓	●	✗
Grupo Madero	No Report	Full	✓	●	✗
Grupo Trigo	No Report	Full	✓	●	✗
Habib's	No Report	Full	✓	●	✗
Mercadinhos São Luiz	No Report	Full	✓	●	✗
Burger King	No Report	Full	✓	●	✗
St Marche	No Report	Full	✓	●	✗
UnidaSul	No Report	Full	✓	●	✗
Divino Fogo	No Report	Full	✗	●	✗
Monster Dog	No Report	Full	✗	●	✗
Subway	No Report	Full	✗	●	✗

*last available report

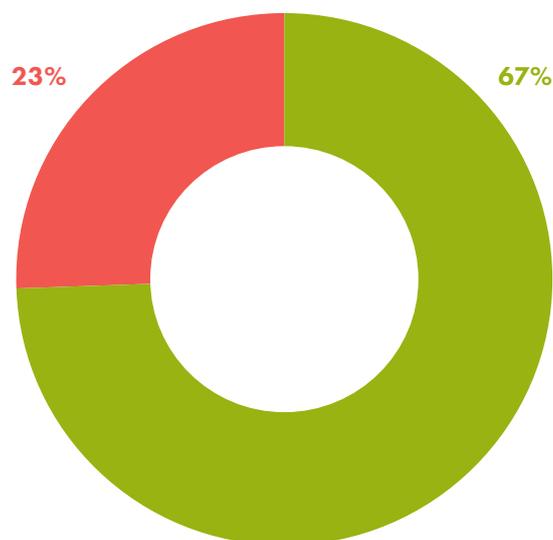
5.4 FARROWING HOUSING AND MANAGEMENT

Just as gestation crates, farrowing crates represent a significant animal welfare issue. In addition to drastically restricting the movement of breeding sows, these structures disregard an essential behavior: the need for females to prepare a nest in a quiet, secluded place to give birth in comfort and safety. In practice, this natural behavior is prevented by the current system.

Thus, the 2025 edition continues to raise questions regarding animal welfare, particularly during the farrowing phase, such as the availability of more physical space for breeding sows, while also introducing a new question about the provision of environmental enrichment for nest building. Animal welfare improvements tend to be implemented gradually; however, it is essential that, as progress is made on the most critical issues, companies incorporate new demands to ensure a continuous process of evolution.

5.4.1 Suppliers

? DOES THE COMPANY PLAN TO PROVIDE MORE SPACE FOR SOWS DURING THE FARROWING PHASE, WITH A MINIMUM AREA OF 1.8 M X 2.4 M?



- **Yes, for new facilities:** Alegria, Alibem, Aurora, Master, Pamplona, JBS
- **No:** MBRF, Frimesa, Pif Paf



HIGHLIGHTS:

- An increase of 29% in the number of suppliers who report having plans to provide more space in the farrowing phase for breeding sows.
- **JBS**, which had responded negatively last year, citing difficulties and still much work to do with crate-free housing, this year reported having plans, as did **Alegria** and **Aurora**.
- **Frimesa** and **Pif Paf** still have no plans to provide more space for farrowing sows.
- **MBRF**, which in 2024 reported plans, showed a setback in this edition.

Frimesa

“We have not yet reached this point of discussion; we need to move forward on issues that are still pending (group housing and pre-implantation systems).”

Pif Paf

“For the moment, the topic has not yet been discussed.”

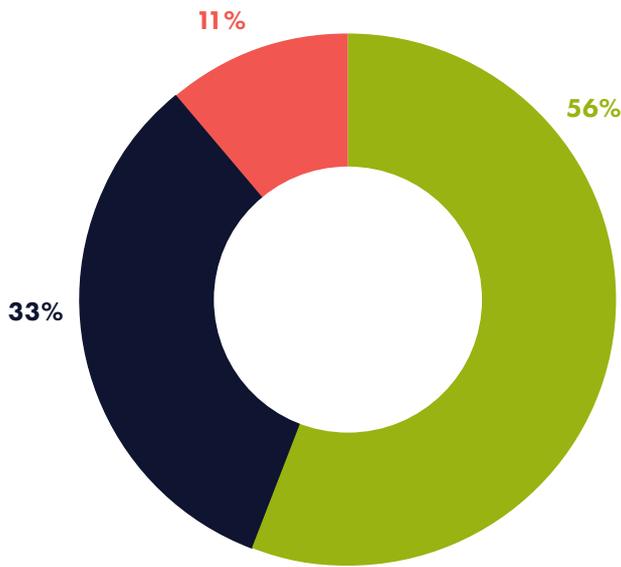
MBRF



(Marfrig, Perdigão and Sadia)

“We will prioritize the completion of the transition from individual housing to group housing before starting the transition of farrowing structures. In addition, there is still no consensus on the best way to adapt farrowing systems without harming piglet welfare.”

? DOES THE COMPANY PLAN TO PROVIDE ENVIRONMENTAL ENRICHMENT IN THE FARROWING PENS TO HELP SOWS BUILD NESTS?



- For all facilities
- For new facilities
- No

• 89% of suppliers plan to provide environmental enrichment in the farrowing pens for sows, either across all farms (**Alegra**, **Aurora**, **MBRF**, and **Pif Paf**) or only in new facilities (**Frimesa**, **Master**, and **Pamplona**), demonstrating a focus on animal welfare during the farrowing phase.

• Only **JBS** reported not having plans to provide environmental enrichment, not even for new facilities, due to a “limited hydro-sanitary system for treating nesting materials.”

• Providing environmental enrichment for nesting is stipulated in NI 113, which should require all companies to have implementation plans.

? WHAT IS THE AVERAGE WEANING AGE OF PIGLETS?

Company	2024	2025
Frimesa	26 days	24 days
JBS	28 days	25 days
MBRF	25 days	26 days
Pif Paf	21 days	23 days
Alegra	24 days	24 days
Alibem	24 days	24 days
Aurora	24 days	24 days
Master	-	24 days
Pamplona	27 days	27 days

• 89% (8/9) of suppliers adopt an average weaning age of 24 days or more, indicating that the sector is aligning with the requirements of NI 113.

• Only **Pif Paf** still weans piglets at less than 24 days, but managed to increase the average by 2 days from one year to the next.

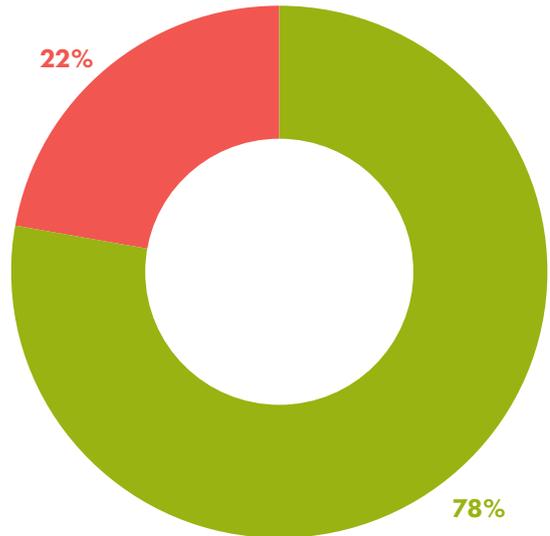
? HAS THE COMPANY BANNED THE SURGICAL CASTRATION OF MALE PIGLETS WITHOUT ANESTHESIA?



**Yes
100%**

• For the second consecutive year, 100% of companies do not perform surgical castration without anesthesia.

? HAS THE COMPANY BANNED TEETH GRINDING?



• **Yes:** Alibem, MBRF, Frimesa, Master, Pamplona, Pif Paf, JBS

• **No:** Alegra, Aurora



HIGHLIGHTS:

- This year, **Frimesa**, which had set 2025 as the deadline to ban teeth grinding, reported that it successfully stopped performing the procedure.
- Only **Alegra** and **Aurora** still perform teeth grinding, with no scheduled date to ban the practice.

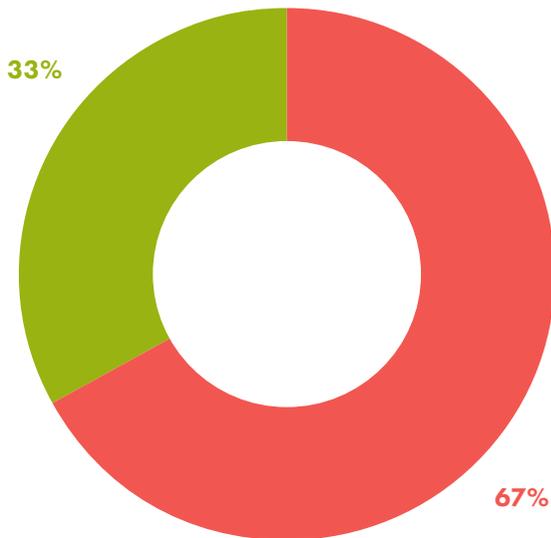


Image: iStock



“We do not have a timeline to ban teeth grinding as this practice is only carried out under the guidance of a veterinarian and in cases where there are lesions on the sows’ mammary glands, which compromise the sow’s welfare, or in cases of facial injuries in the litter.”

? HAS THE COMPANY BANNED EAR NOTCHING?



- **Yes: MBRF, Master, Pif Paf**
- **No: Alegra, Alibem, Aurora, Frimesa, Pamplona, JBS**



HIGHLIGHTS:

- **MBRF, Master** and **Pif Paf** have eliminated ear notching.
- **Pif Paf** uses ear tags as an alternative, as does **MBRF**, which also uses tattoos.
- **Master**, with a fully integrated production cycle, can refrain from individually identifying animals.

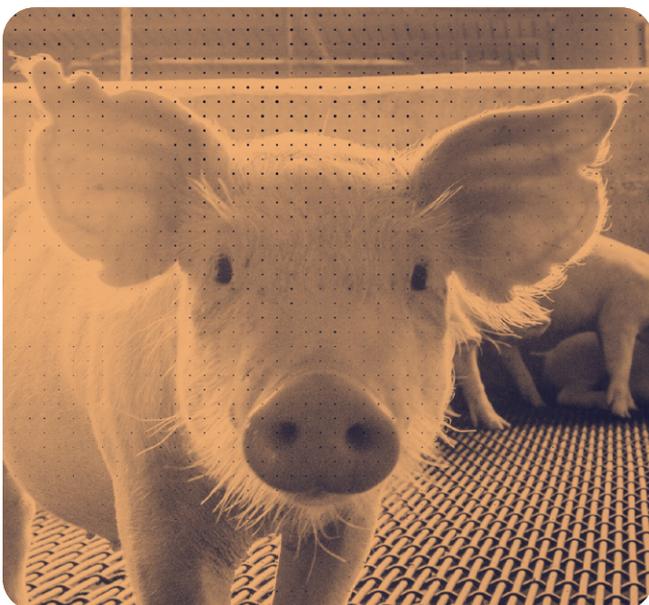


Image: iStock

? HAS THE COMPANY FACED DIFFICULTIES IN BANNING EAR NOTCHING?



Deadline: 2029

“Finding viable alternatives that do not compromise traceability in the production chain.”

ALIBEM

Deadline: 2030

“Available identification alternatives (ear tags, tattoos, chips) are being studied; however, feasibility is affected by factors such as: pain caused during application, potential loss of identification over the animal’s lifetime, material cost, and the disposal of ears after identification (if discarded).”

Frimesa

Deadline: 2025

Reported no difficulties.



Deadline: 2026

“The lack of viable alternatives, e.g., high cost of ear tags and potential loss during handling. Disqualification of tattooed ears at the slaughterhouse and loss of traceability.”

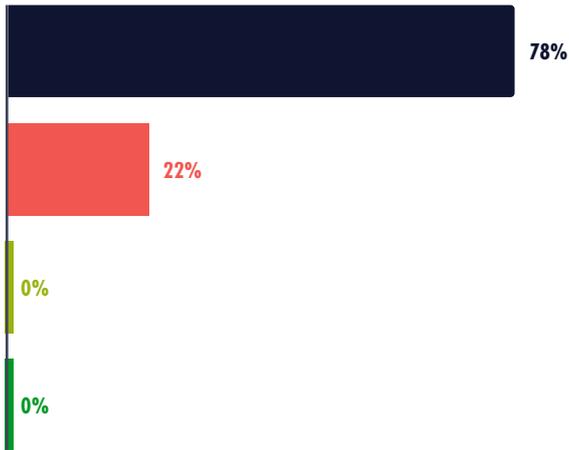


(Seara and Swift)

Deadline: 2027

“Identifying the origin of animals when mixing animals from different locations.”

? HOW IS PIGLET TAIL DOCKING PERFORMED?



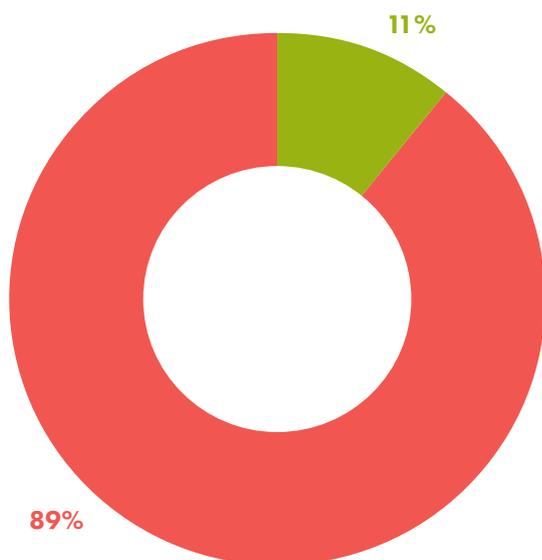
- **With anesthesia**
- **With pain-reducing medication**
- **Tail cut of up to one-third:**
Alegra, Alibem, Aurora, MBRF, Master, Pamplona, JBS
- **None of the options: Pif Paf, Frimesa**



HIGHLIGHTS:

- **Pif Paf** and **Frimesa** are the only companies still performing tail docking without restricting the cut to the final third of the tail, as stipulated by NI 113

? DOES THE COMPANY INTEND TO BAN TAIL DOCKING, EVEN WITHOUT A SET DEADLINE?



- **Yes: MBRF**
- **No: Alegra, Alibem, Aurora, Frimesa, Master, Pamplona, Pif Paf, JBS**

MBRF



(Marfrig, Perdigão and Sadia)

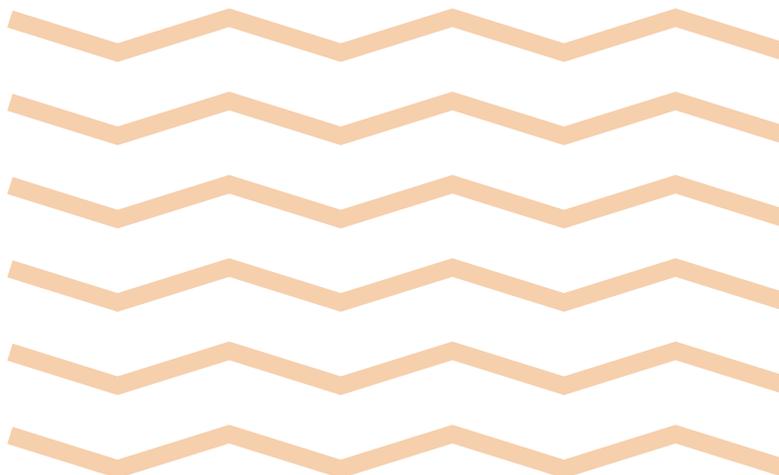
No deadline

“Although a complete ban of the procedure is desirable from an animal welfare perspective, operational realities and production impacts still present significant barriers. Tail biting cases remain recurrent, particularly in critical phases such as the nursery, despite enrichment, density control, and environmental improvements.”

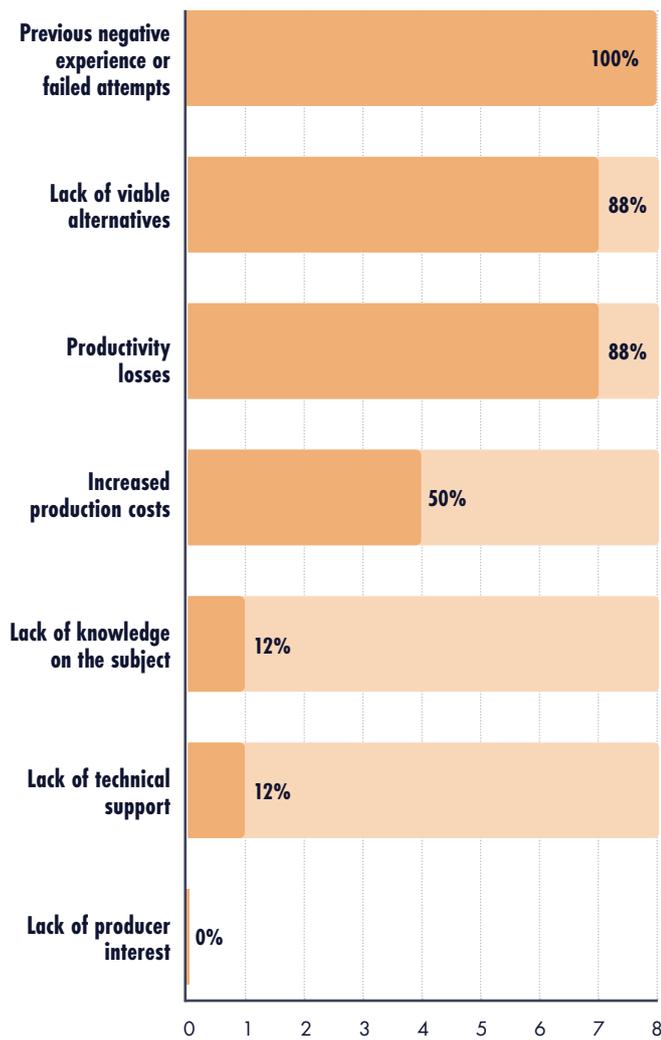
RESPONSES OVER THE YEARS REGARDING THE COMPANIES’ INTENTION TO BAN TAIL DOCKING

Response	2023	2024	2025
Yes	40%	25%	11%
No	60%	75%	89%

It is worth noting the decreasing trend in companies’ intentions to ban tail docking over the years, with only **MBRF** reporting a positive response this year. Tail docking remains the most challenging procedure to eliminate due to the multifactorial nature of tail biting among piglets.



? PWHY DOES THE COMPANY NOT INTEND TO BAN TAIL DOCKING?



“Completely banning tail docking in pigs may cause animal welfare issues, such as cannibalism (tail biting) and injuries in other body regions, leading to weight loss and productivity declines. Aurora Coop follows the technical recommendations described in Normative Instruction No. 113, of December 16, 2020, which advises performing tail docking only on the final third of the tail, and by the third day of the piglet’s life. It also complies with technical procedures recognized by the WOA (World Organisation for Animal Health) Code of Practice.”

• All producers who do not intend to ban tail docking reported **previous negative experiences**.

• A positive point is that there is **producer interest** in the topic, which is the first step in seeking viable alternatives.



“Increased condemnations at the slaughterhouse. Keeping the tail intact, even in enriched environments as per technical guidance, favors the occurrence and aggravation of tail biting among pigs, which negatively affects animal welfare due to the injuries, potential infections, and pain caused. Therefore, the company recommends performing tail docking according to IN 113/2020 guidelines.”



“The multifactorial nature of tail biting and the lack of knowledge about this abnormal behavior remain major challenges in intensive commercial pig farming.”



“In August, we began tests with a specific product to reduce pain in pigs during the tail-docking procedure, with support from the product supplier.”



(Seara and Swift)

“An increase in cannibalism when caudectomy is not performed is harmful to animal welfare.”

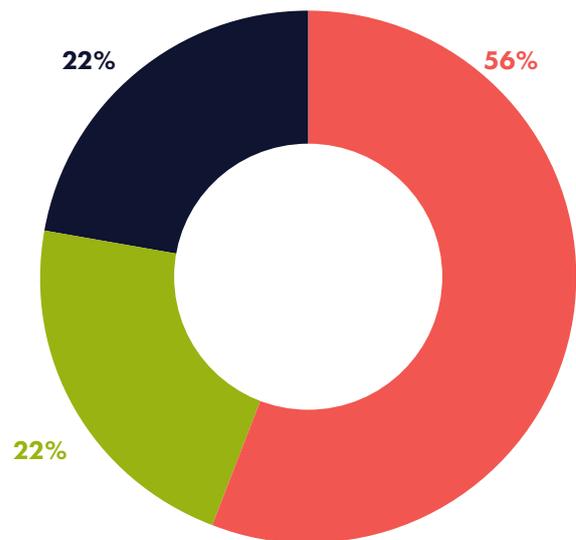
USE OF RACTOPAMINE

Ractopamine is a beta-agonist feed additive used during finishing to **increase lean meat deposition in pigs**, improving feed conversion and carcass yield. However, studies point to serious animal welfare concerns, such as increased sensitivity to pre-slaughter stress, higher mortality, and behavioral and physiological alterations⁷.

Beyond animal welfare, ractopamine may also pose risks to human health. Maximum consumption limits have been established since 2012, but the European Food Safety Authority (EFSA) considered the data insufficient to confirm the substance's safety, leading the European Union to adopt a "zero tolerance" policy for ractopamine. Recent research has also raised the possibility of additional risks, including the induction of genes linked to tumor growth in humans⁸.

Currently, more than 160 countries prohibit ractopamine use, including the European Union, China, Russia, and Thailand. In Brazil, the substance is regulated by the Ministry of Agriculture and Livestock (MAPA) as a zootechnical feed additive for pigs. Due to the global trend toward banning ractopamine, this year's Pig Watch edition included a question about its use to understand how the industry is addressing this issue.

? DOES THE COMPANY USE RACTOPAMINE?



- No
- Some farms
- All farms



HIGHLIGHTS:

- The majority of suppliers (56%) reported using ractopamine in all farms, which is concerning.
- **Aurora** and **MBRF** reported using it in some farms.
- **Alibem** and **Pamplona** are the only companies that reported not using it.

7. [Marchant-Forde JN, et al. The effects of ractopamine on the behavior and physiology of finishing pigs. J Anim Sci. 2003;81\(2\):416-22.](#)

8. [Fan FS, et al. Consumption of meat containing ractopamine might enhance tumor growth through induction of asparagine synthetase \(ASNS\). Eur J Cancer Prev. 2022;31\(1\):82-9.](#)

5.4.2 Buyers

? DOES THE COMPANY HAVE A PUBLIC COMMITMENT REGARDING OTHER PIG WELFARE PRACTICES?

PRACTICES	COMPANY
No, and does not intend to publish	Casa do Pão de Queijo
No, but intends to publish	Halipar, Hippo, Hotel Unique, Quitanda and Dídio Pizza
Ban surgical castration without anesthesia	GPA and Carrefour
Ban tail docking	GPA and Carrefour
Ban ear notching	GPA and Carrefour
Ban ractopamine use	GPA and Carrefour
Ban teeth grinding	GPA and Carrefour
Provide more space for farrowing sows	GPA

- **Casa do Pão de Queijo** is the only company that does not intend to publish any additional pig welfare commitments.

- **GPA** and **Carrefour** reported having commitments to ban various practices, but neither has clear language establishing a definitive ban on teeth grinding, tail docking, or ractopamine use, limiting themselves to partial restrictions or exceptions.

- For a commitment to be recognized, companies must adopt clear and objective language that effectively establishes a definitive ban.

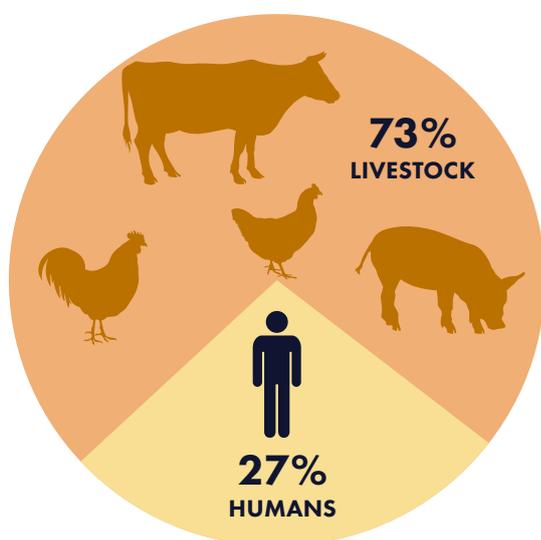
QUITANDA  *São Paulo*

“This is a very delicate topic with small suppliers, as they do not have control or information about the raw materials. We would like more support from Alianima to raise supplier awareness and encourage sourcing from producers who follow pig welfare practices.”

5.5 USE OF ANTIMICROBIALS

In this edition of the Pig Watch Report, **antimicrobial use in pig farming** was again addressed, as it is **one of the most urgent topics within the One Health perspective**. It is estimated that **around 73% of all antimicrobials sold globally are intended for animal use**, and many of these active ingredients are also used in human medicine, thereby increasing the risk of antimicrobial resistance.

PROPORTION OF GLOBAL ANTIMICROBIAL USE BETWEEN HUMANS AND LIVESTOCK⁹



In response, **Alianima has engaged intersectorally in the Antimicrobial Resistance Working Group, which is linked to the One Health Committee established by the Brazilian Ministry of Health**. This work aligns with the National Plan for the Prevention and Control of Antimicrobial Resistance (PAN-BR), which integrates multiple ministries and establishes actions to reduce the indiscriminate use of antibiotics in both human and animal health. Alianima's participation highlights the importance of including animal welfare in these discussions, demonstrating how best management practices can contribute to rational antimicrobial use.



POSSIBLE WAYS OF USING ANTIMICROBIALS IN ANIMAL PRODUCTION:

GROWTH PROMOTER

The **most controversial** usage. Small, continuous doses of antimicrobials are administered through feed, creating an ideal environment for the **selection of antimicrobial-resistant pathogens**. The goal is to increase productivity and animal growth by improving nutrient absorption efficiency. Producers **should minimize their use as growth promoters**, and MAPA **has prohibited** the application of multiple classes of these drugs for this purpose.

PROPHYLACTIC

Used in situations with imminent risk of disease occurrence or outbreaks, for preventive purposes. Most often, antimicrobials are administered via feed or water, but in much higher doses than growth promoters. Even so, maintaining this use over the medium and long term **promotes the selection of resistant microorganisms and should also be avoided**.

METAPHYLACTIC

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

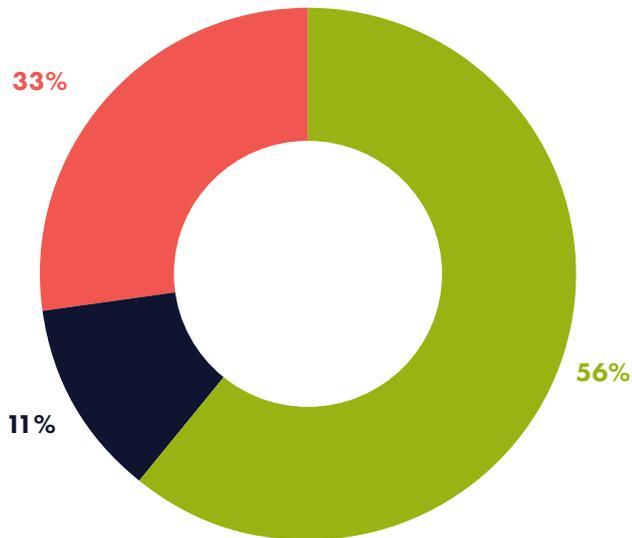
THERAPEUTIC

Refers to the treatment of diseases that are already established and diagnosed. Therapeutic use is considered the **most appropriate use of these drugs**, preferably administered individually, either orally or by injection.

9. 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>>

5.5.1 Suppliers

? DOES THE COMPANY INTEND TO BAN, OR HAS IT ALREADY BANNED, THE USE OF ANTIBIOTICS AS GROWTH PROMOTERS?



HIGHLIGHTS:

- **Frimesa**, which last year claimed to have banned growth-promoting antibiotics, has reversed its position and stated its intent to ban their use by 2027.
- **Alegra** and **Aurora** continue to use antibiotics as growth promoters, without reporting any barriers to banning them.
- **Pif Paf**, which last year intended to ban, this year joined **Alegra** and **Aurora** in continuing to use it, showing a regression.

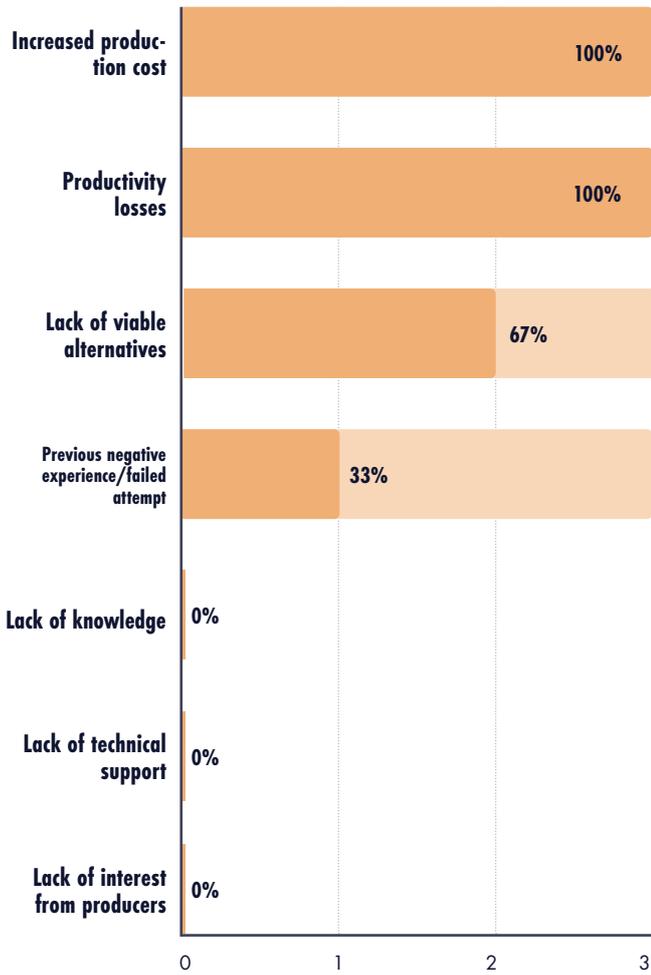
Already banned
Intends to ban
Does not intend to ban

Frimesa

“This topic was recently raised with our suppliers, and there was some resistance. Our animal welfare committee meetings will address it.”



? REASONS FOR NOT BANNING ANTIBIOTICS AS GROWTH PROMOTERS:



- There is knowledge, technical support, and producer interest, but companies still struggle to plan a ban.

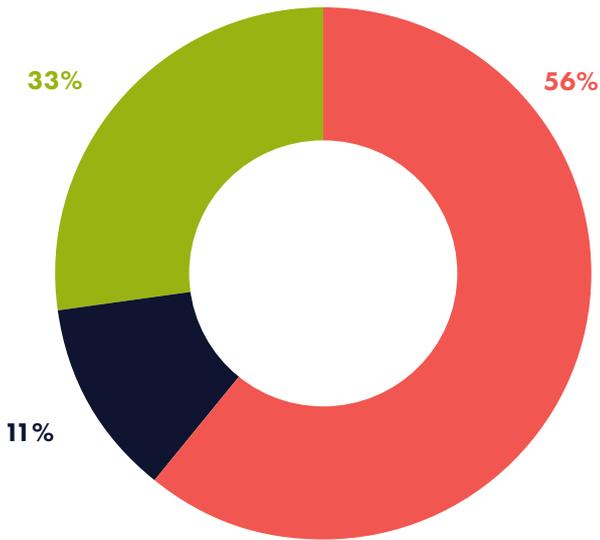


“Lack of products that can replace growth promoters while providing the same levels of efficiency, performance, health, and welfare at compatible costs. Banning growth promoters could significantly increase the number of sick animals and infection cases.”



Image: Microrao, Wikimedia Commons

? DOES THE COMPANY INTEND TO BAN OR HAS IT ALREADY BANNED THE PREVENTIVE (PROPHYLACTIC) USE OF ANTIBIOTICS?



Already banned
Intends to ban - no deadline
No

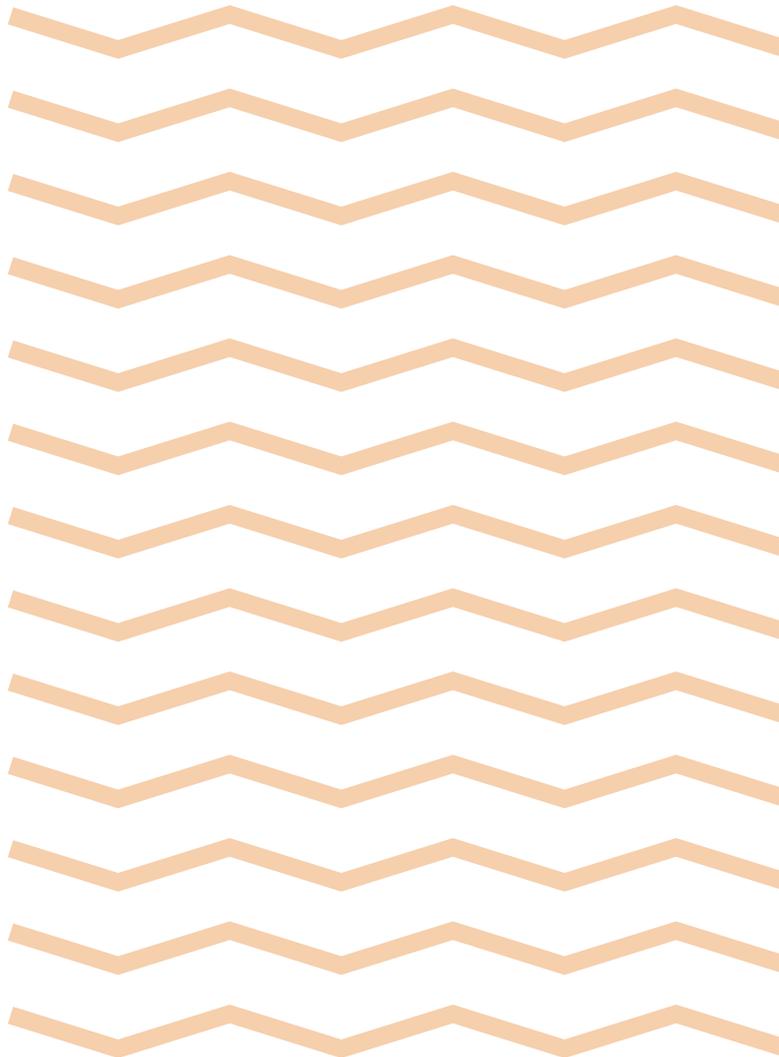
Pif Paf

“There are many challenges, and we intend to evaluate them through in-depth studies to achieve a positive experience. The company keeps the technical team updated, complying with current legislation.”

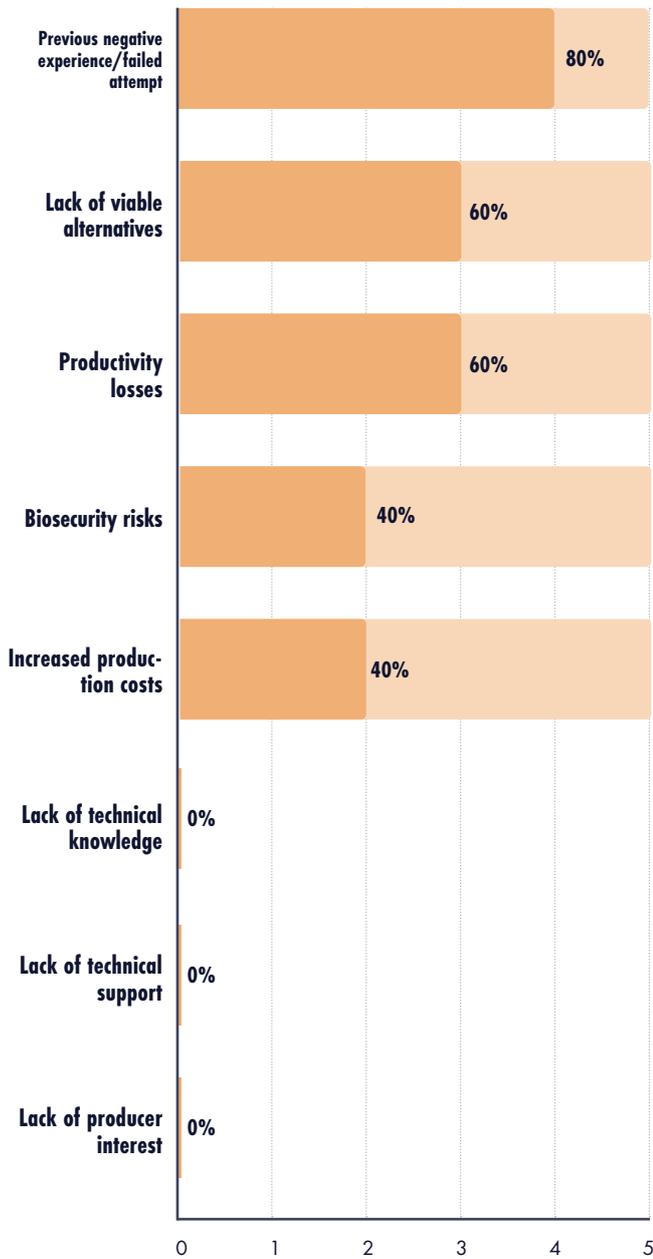


HIGHLIGHTS:

- As a positive development, **Alegria** and **Aurora** (which had not initially intended to ban it) and **MBRF** (which had a 2025 deadline) have already banned prophylactic use of antimicrobials.
- **Pif Paf** continues to report intentions to ban, but still without a deadline.
- **Alibem, Master, Pamplona,** and **JBS** do not intend to ban it.
- **Frimesa** had intended to ban, but this year reported otherwise.



? REASONS FOR NOT BANNING THE PREVENTIVE (PROPHYLACTIC) USE OF ANTIBIOTICS:



“Increased health challenges, particularly respiratory, enteric, and reproductive issues, resulting in higher productivity losses and production costs. Studies with eubiotics are ongoing but have not matched the efficacy of prophylactic antibiotic use.”

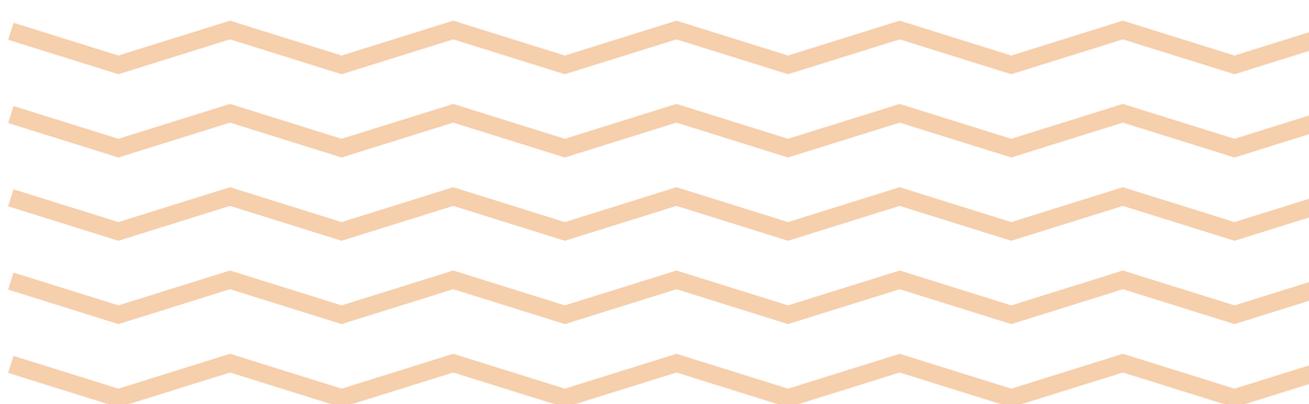


“Presence of multiple agents causing enteric and respiratory infections.”

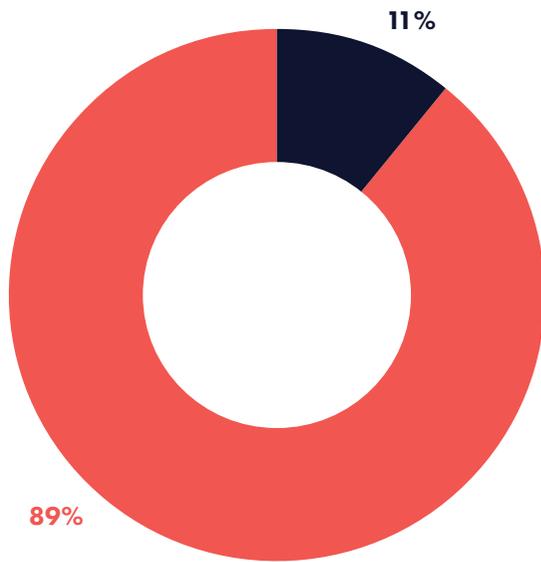


(Seara and Swift)

“Animals need medication to maintain welfare and stay free from illness.”



? DOES THE COMPANY INTEND TO BAN, OR HAS IT ALREADY BANNED, THE METAPHYLACTIC USE OF ANTIBIOTICS?



MBRF



(Marfrig, Perdigão and Sadia)

MBRF - deadline: 2027

“The significant increase of infectious agents in pig farms has intensified health challenges. In this context, the use of metaphylactic antibiotics is still necessary to preserve animal health and ensure production continuity. Current alternatives for effective microorganism control remain limited, emphasizing the importance of a strategic approach, well-defined protocols, constant monitoring, and responsible medication use.”

Already banned

Intends to ban

MBRF



(Marfrig, Perdigão and Sadia)

Deadline: 2027

No



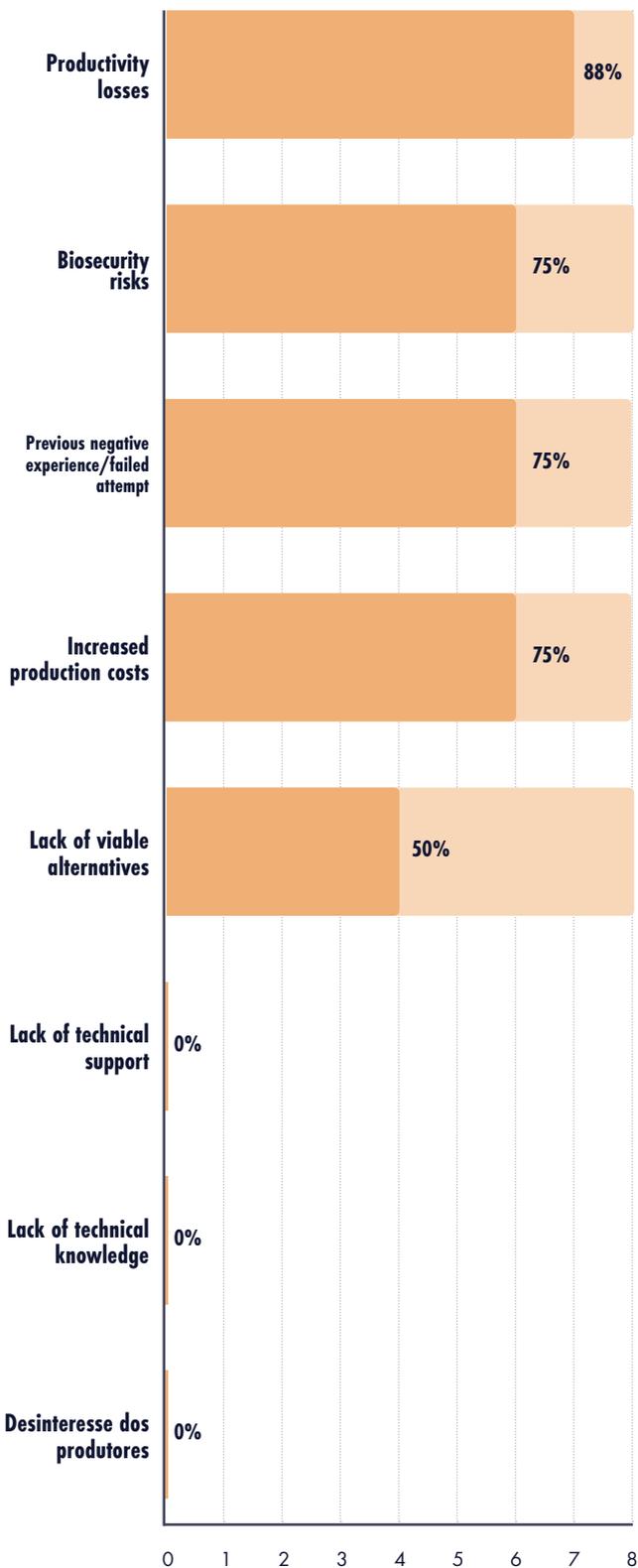
(Seara and Swift)



HIGHLIGHTS:

- For the third consecutive year, only **MBRF** plans to ban the use of metaphylactic antibiotics, with a 2027 deadline.

? REASONS FOR NOT BANNING METAPHYLACTIC ANTIBIOTIC USE:



“Banning metaphylactic antibiotic use may disrupt animal health balance, increasing disease incidence, sick animals, welfare risks, and economic losses.”



“Controlling or eradicating diseases is difficult without metaphylactic use.”



“Aurora Coop actively participates in antibiotic use discussions with Brazilian industry associations. We also encourage rational and responsible use of these substances in our technical team.”



“Mixing animals from different origins, endemic diseases, and ineffective vaccines in the Brazilian market complicates control measures.”



(Seara and Swift)

“Treatment is necessary for animals affected by diseases to prevent welfare compromise.”

? DOES THE COMPANY USE ALTERNATIVES TO ANTIMICROBIALS?

• All companies report using alternatives to antimicrobials, similar to those reported in last year's edition. However, these measures have not yet been sufficient to eliminate non-therapeutic antimicrobial use.

	<ul style="list-style-type: none"> • Eubiotics • Minerals
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	<ul style="list-style-type: none"> • Eubiotics • Expanded vaccination program • Segregated herds in sanitary pyramids
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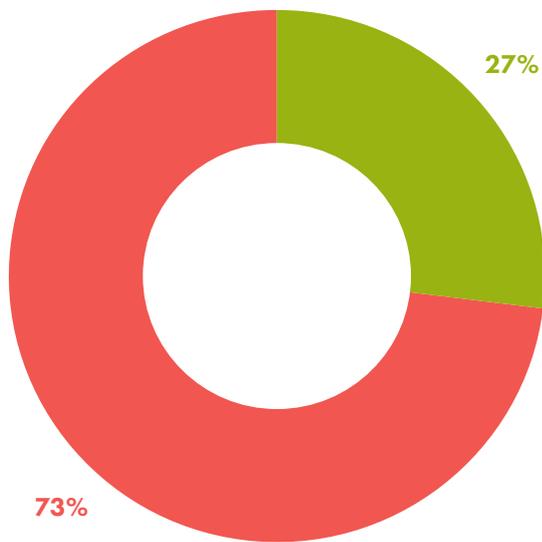
	<ul style="list-style-type: none"> • Eubiotics • Nutraceuticals • Minerals
---	---

	<ul style="list-style-type: none"> • Eubiotics (exogenous enzymes) • Nutraceuticals (synthetic amino acids) • Minerals • Raw material and feed quality control plan • Liquid energy system • Digestible amino acids in diet formulation • Anti-mycotoxin additives • Essential oils • Herbal extracts • Prebiotics • Probiotics • Microminerals • Functional fibers
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5.5.2 Buyers

As with section 5.4.2, this year we asked whether companies have public commitments requiring their suppliers to use antibiotics only for the treatment of sick animals—not just an abstract idea without direct company oversight or accountability.

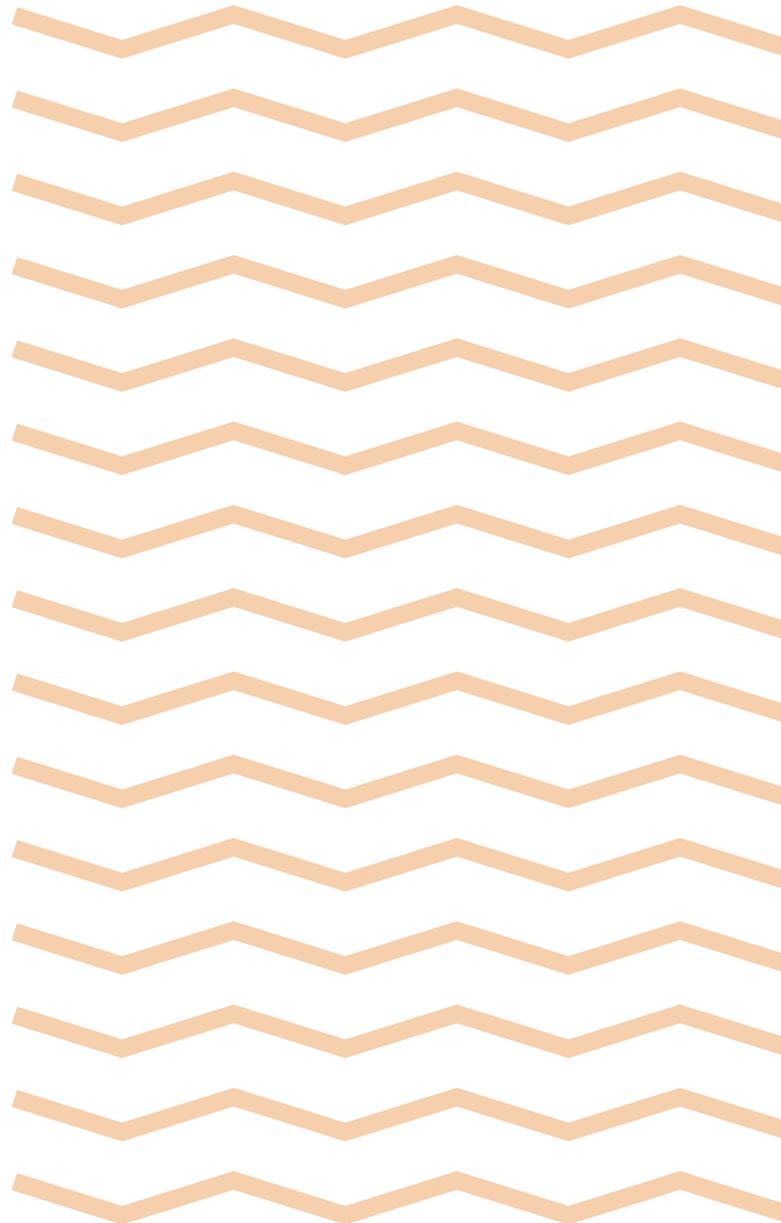
? DOES THE COMPANY HAVE A PUBLIC COMMITMENT REQUIRING SUPPLIERS TO RESTRICT ANTIBIOTIC USE TO TREATING SICK ANIMALS?



Yes		
No		

Only **Arcos Dorados**, **Carrefour**, and **GPA** reported public commitments. However, none explicitly ban prophylactic or metaphylactic use, as the public commitments' language is generic—e.g., “reduced use,” “responsible use”—and does not require antibiotics solely for treatment.

Buyers must be aware of their suppliers' practices, even if not directly involved in pig production, as this is a matter of public interest.



6. CONCLUSION

The *Pig Watch Report* reaches **its sixth edition, reaffirming the importance of monitoring corporate commitments to animal welfare** in pig farming and now offering a more precise and up-to-date view of progress and bottlenecks in the supply chain.

From the suppliers' perspective, **maintaining 100% participation for the second consecutive year** confirms the sector's recognition of the *Pig Watch Report* as a tool for transparency and commitment to animal welfare, despite challenges in implementing best practices.

Although this report is published annually, collecting and publishing **official data** on sow housing and other NI 113/2020 requirements would be extremely valuable. The *Pig Watch* estimate that **62% of the national herd is committed to group housing (45% already converted)** remains imprecise and highly dependent on complete supplier reporting.

The formalization of the **Technical Cooperation Agreement (ACT) between Alianima, the Ministry of Agriculture (MAPA), and the Brazilian Association of Pig Producers (ABCS)**, initiated earlier this year, could mitigate the lack of national data, recognizing producers' progress on NI 113/2020 standards, encouraging implementation, and allowing broader mapping of the national pig sector. This joint effort is ongoing, with updates expected for early 2026.

This year, progress was seen in group housing among most suppliers, as well as in public commitments to pre-implantation systems for new facilities. Notably, **JBS** achieved a 98% transition rate, demonstrating strong engagement in meeting its 2025 deadline and signaling to peers that clear goals and technical

execution can produce tangible results. With **44% of companies committed through 2026**, further progress is anticipated in the next edition.

In farrowing, the sector demonstrated greater discernment, **with more companies planning to allocate more space for sows and to provide environmental enrichment to support nesting behavior**. Positive milestones were also observed in piglet management, with **increased bans on teeth grinding and ear notching**. Conversely, **tail docking remains the most critical procedure, with continuing regression in elimination plans over the years**. Research on preventing this mutilation without compromising welfare from tail biting **remains crucial**.



Image: Kallerna, Wikimedia Commons

Regarding antimicrobial use, the situation is concerning. While **some companies have stopped prophylactic use, metaphylactic bans remain rare, and growth promoter bans show little adoption.** Additionally, **widespread ractopamine use threatens market access,** reputation, and increases animal health and stress vulnerabilities.

Among buyers, **response rates improved and transition percentages progressed.** However, significant gaps remain, including: (i) lack of transparency from most committed companies, especially those near deadlines (**23% by 2025, 35% by 2026**); (ii) inconsistencies between reported percentages and supplier information access; and (iii) partial commitments. Furthermore, adoption of additional public commitments (pre-implantation, farrowing, piglet management, antimicrobials,

ractopamine) remains exceptional. These points indicate **low awareness and demand for higher-welfare pig products among buyers.** Responsibility is shared: buyers must publicly demand improvements, and suppliers must meet those demands through a transparent, continuous process. Aligning transparency with execution transforms commitments from market intentions into tangible supply chain evolution, benefiting animals, humans, and the environment.

Suppliers and buyers are invited to formalize public commitments to animal welfare, strengthening sector coherence and ensuring systemic transformation. Alianima thanks the participating companies, whose individual contributions are essential for overcoming the identified bottlenecks and achieving the transition that society expects.

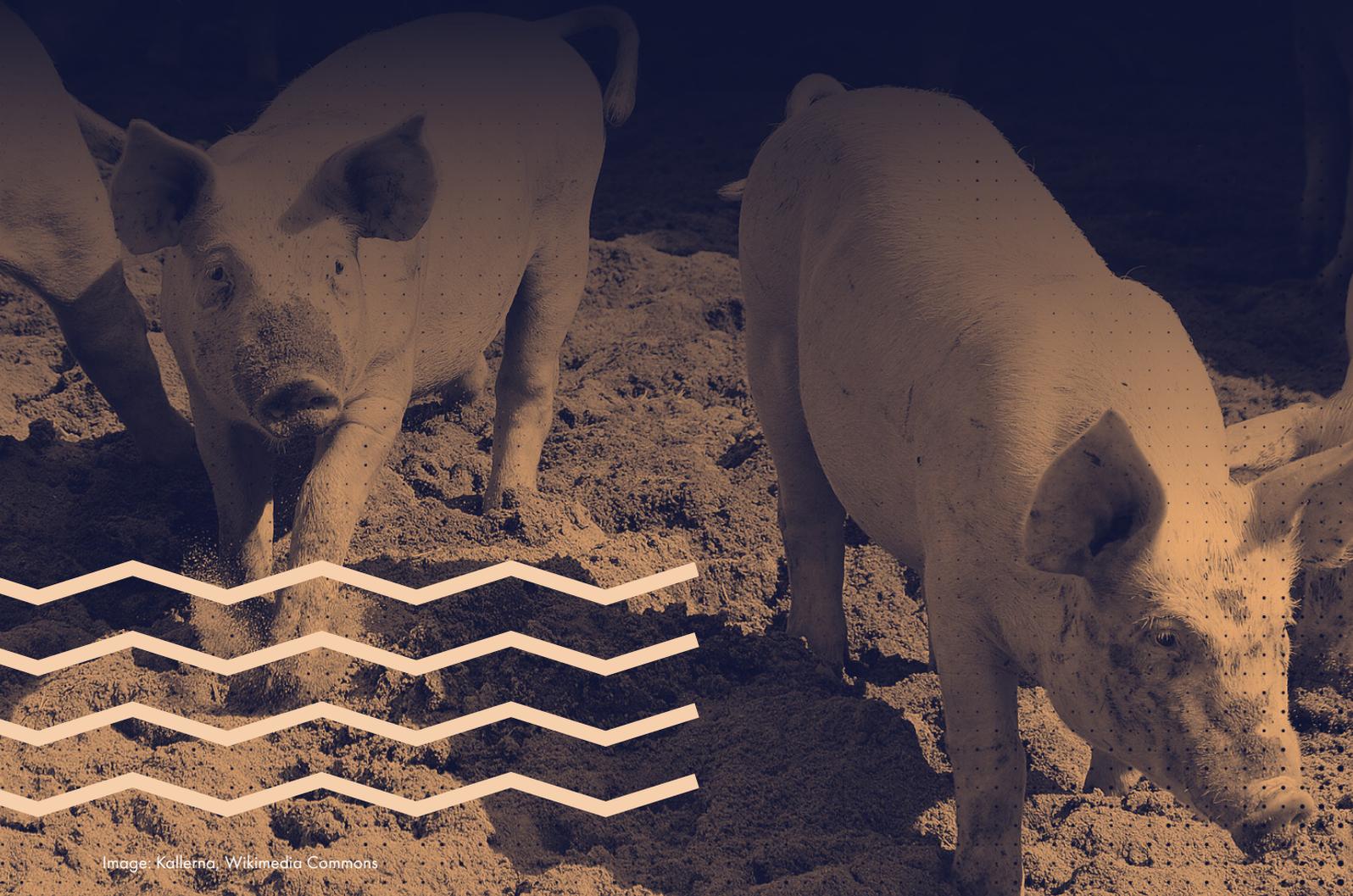


Image: Kallerna, Wikimedia Commons

11. CONTACT

JOIN THIS GREAT MOVEMENT FOR ANIMALS!

For companies seeking additional information about our work or specific questions on animal welfare, please contact us through the following channels:



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