

Vertical Coordination in the US Pork Industry: Status, Motivations, and Expectations

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In addition to horizontal consolidation at the input, production, and processing subsectors, the US pork industry is becoming more vertically aligned. The largest hog producers and pork processors were surveyed regarding their involvement in vertical coordination arrangements and their plans for future involvement in such programs. Motivation for entering these vertical agreements was examined as was the rate of adoption. Structural and regional implications of these results for the pork industry are discussed. © 1997 John Wiley & Sons, Inc.

Introduction

Concerns about the pork industry becoming vertically integrated like the broiler industry in the United States were first voiced in the 1960s, but little change was noted until the last decade. **The US**

pork industry is rapidly evolving from one of relatively small independent producers and processors connected by the spot market to a contract-coordinated industry involving fewer and substantially larger firms. Many fear that the pork sector will become highly consolidated and vertically integrated, affecting the viability of independent producers and processors and the rural communities where much of the industry is based. Others argue that the trends reflect a maturing industry positioning itself to be more competitive in a global protein market.

The current coordination arrangements between hog producers and packers were the subjects of surveys conducted for the USDA Packers and Stockyards Program in 1994 by Hayenga, et al.¹ In 1995, a large number of hog producers were surveyed on similar issues by Grimes and Rhodes.² These studies focus on the largest packers and hog producers/contractors likely to be the driving forces in changes in pork-sector coordination and

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