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Report Highlights:

While the EU cattle sector continues to struggle with environmental and animal welfare regulations and the further spread of animal diseases, the EU swine sector is finding a new balance after the falling pork exports to China. Low feed prices have been a positive factor for both sectors. In line with lower production and rising prices, EU beef exports are forecast to decrease after the spike in exports to Türkiye in 2024. The EU swine sector is increasing its focus on the domestic market and attempting to diversify exports, which are forecast to drop to 2.9 million metric tons in 2025, and decline further in 2026.

Executive Summary – EU Consumers Are Turning to Pork

Cattle and Beef – ***Regulations and Animal Diseases Are Paralyzing the Sector***

Herd Size and Calf Crop: The herd size and calf crop are forecast to shrink further through 2026. The cattle sector is facing multiple limiting factors related to high input costs (for energy, loans, and labor), and restrictive environmental and animal welfare regulations.

Slaughter and Trade: After a rise in 2024, slaughter is projected to fall in 2025 and 2026 as the supply of young animals is declining. Both EU internal and export sales of live animals are constrained by the further spread of animal diseases.

Beef Production: In 2025 and 2026, EU beef production is anticipated to decrease. However, in 2025 the drop will be somewhat tempered by increasing slaughter weights. Animals are slaughtered at a higher weight due to relatively low feed prices, high carcass prices, and restricted access to young animals.

Beef Domestic Sales and Trade: As a result of shrinking production and strictly regulated imports, beef is getting increasingly expensive on the EU market, which is restraining domestic consumption as well as exports.

Swine and Pork – ***EU Swine Sector Finds New Balance After Falling Chinese Imports***

Herd Size and Pig Crop: The herd size and pig crop are forecast to shrink through 2026 due to mainly restructuring in Northwestern Europe in response to environmental regulations.

Slaughter and Trade: In 2025, EU slaughter is forecast to increase based on elevated slaughter during the first half of the year. During 2026, slaughter is anticipated to find a new balance at a slightly lower level.

Pork Production: In 2025, EU pork production is expected to increase based on elevated slaughter further supported by higher weights at slaughter. In 2026, lower slaughter will be tempered by the higher weights.

Pork Domestic Sales and Trade: Due to increasing beef and poultry meat prices, EU consumers are turning to pork. The EU sector is increasing its focus on the domestic market and attempting to diversify exports as it realizes that the past sales to China cannot be replaced.

Cattle

Animal Numbers, Cattle	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks	73,745	73,745	71,822	71,896	0	70,580
Dairy Cows Beg. Stocks	19,913	19,912	19,226	19,221	0	19,050
Beef Cows Beg. Stocks	10,319	10,328	10,087	10,082	0	9,950
Production (Calf Crop)	23,350	23,350	23,200	22,900	0	22,700
Total Imports	6	7	5	15	0	10
Total Supply	97,101	97,102	95,027	94,811	0	93,290
Total Exports	815	808	780	700	0	700
Cow Slaughter	10,380	10,344	10,200	9,950	0	9,800
Calf Slaughter	5,800	5,592	5,750	5,300	0	5,100
Other Slaughter	6,720	6,951	6,550	6,850	0	6,750
Total Slaughter	22,900	22,887	22,500	22,100	0	21,650
Loss and Residual	1,564	1,511	1,247	1,431	0	1,400
Ending Inventories	71,822	71,896	70,500	70,580	0	69,540
Total Distribution	97,101	97,102	95,027	94,811	0	93,290
(1,000 HEAD)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Source: Eurostat and FAS Offices. Includes backyard slaughter.

This Year's Slaughter Is Forecast to Fall More Significantly Than Anticipated
The trends forecast in the EU Livestock Semi-annual for the EU cattle sector are kept in this report. FAS Post 2024 cattle numbers are adjusted based on minor updates by Eurostat and the Trade Data Monitor (TDM) and the loss figures revised accordingly. For this year, the Post numbers are adjusted significantly based on recent Eurostat monthly official and annual backyard slaughter figures. As forecast in the EU Livestock Semi-annual, cow, calf, and total cattle slaughter levels are falling after the rise of slaughter in 2024. But monthly Eurostat statistics for the first half of the year show a more significant reduction than earlier anticipated, with reductions of 3.9 percent, 10.3 percent, and 4.8 percent, respectively. In absolute terms, the most significant reductions are reported in the Netherlands, Germany, France, Spain, Ireland, and Poland.

The Dutch, Belgian, and Irish Sector Are Under Pressure by Environmental Regulations
During the first half of 2025, Dutch slaughter plummeted mainly due to the reduction of calve slaughter. Since 2024, imports of calves have been restricted and as a result Dutch imports from Denmark and Ireland have been cut. A reduction of veal farmers and lower veal sales may also play a role. Dutch cow slaughter is also on the decline after an increase in 2024. In 2024, the Netherlands lost its EU derogation to spread more manure on dairy pastures (related to water quality regulations). In the long term, the water quality and nitrogen regulations could result in less animals per farm, and to a lesser extent farm sales and buyouts. (for more information see the GAIN report - Dutch Loss of Manure Derogation, published on June 6, 2024). A similar situation is reported in Ireland, where the sector lost part of its nitrate derogation with the remainder under scrutiny and the cattle herd is on the decline despite high

prices for milk and beef. Also, the Belgian cattle sector is under pressure by environmental regulation, especially in Flanders, where it is failing to meet its conservation obligations under the EU Habitats Directive. About 25 percent of the beef farms are indicating that they are planning to stop their activities by 2030.

Germany and Austria Are Introducing Higher Animal Welfare Standards

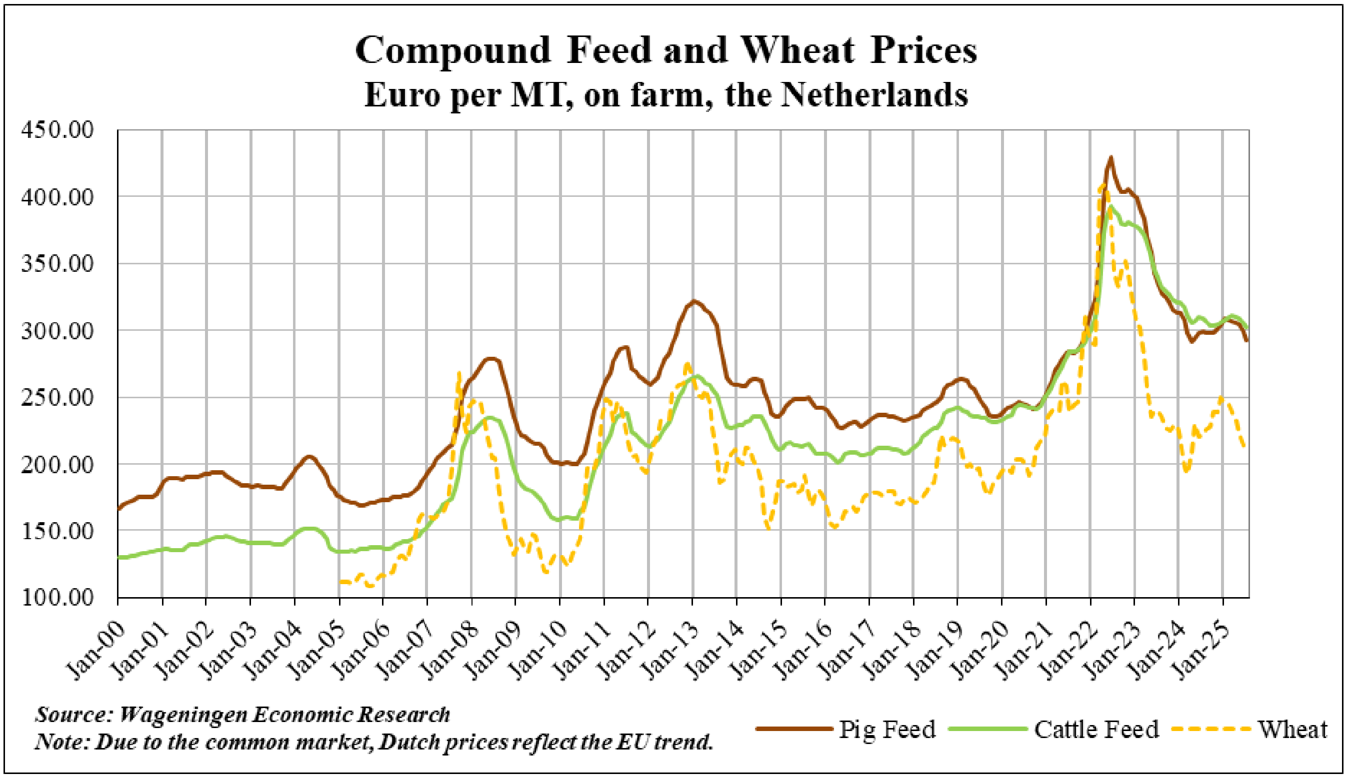
In Germany, a wide variety of factors is causing the decline of slaughter. In the past ten years, many German farmers went out of business because of low and volatile milk prices, increasingly strict environmental regulations (see Policy section), and animal welfare standards that required investments they or farm successors were not able or willing to make. Many retailers announced that they are planning to source beef and milk only from farms which adhere to higher standards of animal welfare (e.g. Rewe, Lidl and Edeka, and ALDI Süd). There are five levels of standards (Haltungsform Stufe one to five), which for example require more space per animal, genetically modified (GM)-free feed, and outdoor access. In addition, many farms are struggling with the consequences of the Bluetongue Virus (BTV) outbreak last year. German herd performance remains lower, with numerous cows aborting or failing to conceive altogether. For Austrian beef producers, Germany is the main foreign market. Austria basically introduced these animal welfare standards (“Mehr Tierwohl”) to not lose out on the German market. But the market for the higher animal welfare standards is not growing as hoped by the producers. Organic beef and veal sales are still at a very low level as not many consumers are willing to pay price premiums of over 80 percent.

The French Sector Is Struggling with Higher Input Costs and Animal Diseases

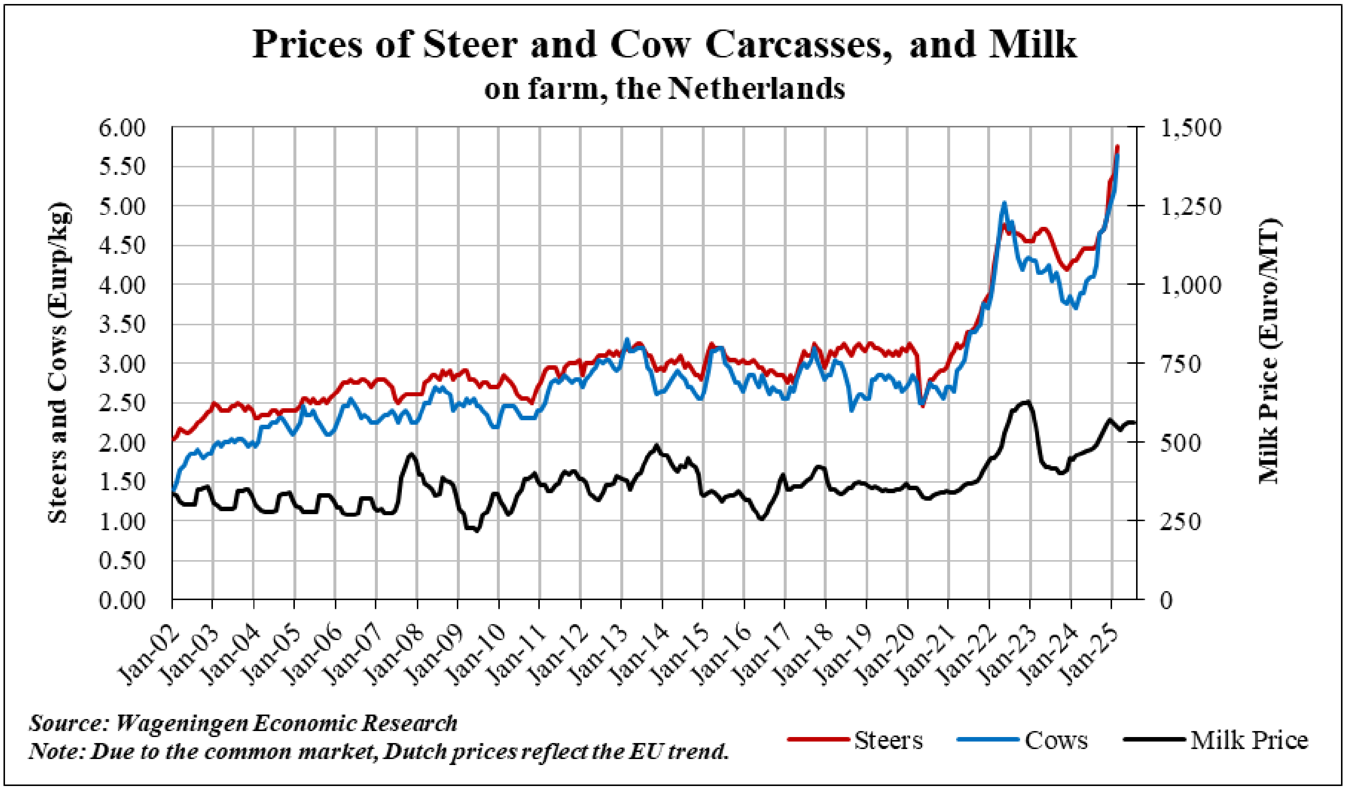
In France, overall cattle slaughter declined in 2024 and is anticipated to drop again in 2025 and 2026 due to the lower supply of animals. Despite lower feeding costs (see graph), ranchers continue to face high costs for operating the farm, in particular labor and energy. The cattle herd was also impacted by several disease outbreaks, notably BTV in the northern half of France and Epizootic Hemorrhagic Disease (EHD) in the southern half of France. It led to abortions, and lower fertility. In addition, the Lumpy Skin Disease (LSD) is affecting dairy herds in the Southeast of France since the summer of 2025, leading to the culling of hundreds of dairy cows. A vaccination program is underway, but its impact will not be visible before the end of 2025.

Animal Disease Outbreaks Have Reduced Spain’s and Poland’s Access to Young Livestock

Spain’s cattle herd continues to contract, despite high prices paid to farmers, feed affordability (see graphs below), and ample forage supplies for grazing available in the spring of 2025. Drivers for this herd reduction include restricted access to animals to be fed, which are normally sourced from other EU Member States. The restricted import supply is caused by a range of animal diseases which affect fertility and calf crops as well as the transport of young animals. In Spain, fertility has been negatively affected by Epizootic Hemorrhagic Disease (EHD) outbreaks since 2023. The situation started to reverse in 2025 with outbreaks under control and a vaccine authorized as of July 4, 2024. As LSD is advancing in the EU, Spain’s cattle sector is being extremely vigilant and Spain’s Official Veterinary Services have strengthened epidemiological surveillance of live animal movements from France and Italy. LSD can increase mortality in young cattle and reduce productivity, particularly in dairy cows. While Polish slaughter increased slightly during the first five months of 2025, it is forecast to fall during the remainder of the year. In 2024, Polish slaughter increased partly driven by the imports of animals from the Baltic region, Czechia, and Slovakia. But like the Spanish sector, the spread of animal diseases and resulting transport restrictions is limiting the access to young animals for fattening and slaughter.



Negative Market Factors Cause a Rise in Slaughter in Hungary and Romania
On March 5, 2025, the Hungarian National Food Chain Safety Office identified a Foot and Mouth Disease (FMD) outbreak at a cattle operation in Győr-Moson-Sopron County, marking the first occurrence in 50 years. The sector quickly adapted to the FMD situation, applying regionalization within the EU market. However, many operations had to shift focus to the domestic market, as non-EU export destinations such as Türkiye and Balkan countries (Kosovo, Albania, Serbia) imposed a ban on Hungarian exports of cloven-hoofed live animals and certain fresh products. On June 6, 2025, the EU lifted all FMD-related restrictions and protection and surveillance zones. However, the veterinary service is still working to restore the country’s FMD-free status. Overall, the FMD outbreaks have negatively affected the country’s bovine production and trade. As a result, more cattle are expected to be slaughtered domestically. Hungarian slaughter increased by 26 percent during the first half of 2025. In Romania, the current challenges with the feed and pasture quality are forecast to support domestic cattle slaughter as well as exports. Slaughter was 22 percent higher during the first half of 2025. As a result, the Romanian cattle herd is projected to shrink further in 2026. In Czechia, Croatia and Greece cattle numbers are now stabilizing and even showing slight growth. But the sectors in these countries remain under pressure due to high labor, transportation, and maintenance costs, leaving many beef producers barely breaking even.



In Parts of the Balkan and Central Europe the Trend Is More Commercialization

In Bulgaria, the beef herd in 2025 is expected to either stagnate or return to growth, driven by the rising importance of commercial farms. These farms, covering both dairy and beef production, now account for over 60 percent of the national cattle inventory. This reflects a broader trend seen across parts of the Balkans and Central Europe: greater commercialization and sector concentration, with less backyard slaughter and higher efficiency. For more information see the GAIN report - Bulgarian Livestock and Products Market Update, published on July 26, 2024.

EU Exports of Live Cattle Are Restricted Due to Animal Diseases and Transport Restrictions

Exports of live cattle to third countries are an important revenue for cattle farmers in Central Europe, the Balkan region, and the Iberian Peninsula. These exports, particularly to non-EU countries, are mainly comprised of finished cattle intended for slaughter. During 2024 and 2025, several EU Member States have seen sales of their cattle restricted due to the spread of animal diseases such as FMD and BTV (see for the situation in Hungary the paragraph above). In addition, since the beginning of 2024, live cattle exports to Türkiye are subject to stricter EU animal welfare regulations as well as new Turkish sourcing policies. For more information see the FAS GAIN report - Turkish Government Establishes Feeder Cattle Quota for 2024, published January 30, 2024. In January 2025, the Turkish Ministry of Agriculture released additional restrictions for live cattle imports. For more information see the FAS GAIN report - More Restrictions on Live Cattle Exports to Türkiye, published November 14, 2024. New EU animal welfare legislation, which is expected this year, has the potential to further restrict live cattle exports to third countries (for more information, see the Policy section of this report). Despite the hurdles, EU exports to Morocco (from Spain and France) and Israel (from Romania) increased during the first half of 2025.

Mounting Regulations and Diseases Are Forecast to Further Press the Sector in 2026
Overall, the continuous flow of new EU requirements requires additional financial investments and a change of farm management, pressing profit margins even further. As a result of the mounting requirements, there is considerable insecurity among cattle farmers. In addition, animal diseases play an increasing negative role for both the dairy and beef sector, specifically FMD, BTV, (with several serotypes present: BTV-8, BTV-4 and more recently BTV-3), and EHD. For more information see the Policy section of this report and GAIN reports - Bluetongue Disease Outbreak in the Netherlands Despite Vaccinations - Impacting Sheep and Dairy Sector, and - Bluetongue Disease Reaches Three Nordic Countries. Based on the current disease situation and dim outlook for the cattle sector, the calf crop is adjusted to a lower level and the loss to a higher level than projected in the Semi-annual, resulting in a 2025 ending stock of 70.6 million head of cattle, 1.83 percent lower than the beginning stock. In 2026, the contraction of the cattle herd, calf crop, and slaughter is forecast to continue though at a slower pace with slight improvements of the calf / cow and loss ratio. The most significant reductions of slaughter are projected in France, Poland, the Netherlands, Germany, and Ireland. Significant increases are not foreseen in any of the EU Member States. With the lower influx of young animals and relatively higher slaughter ratio compared to 2025, the ending inventories are forecast to decline to 69.5 million head, a reduction of 1.47 percent.

Beef

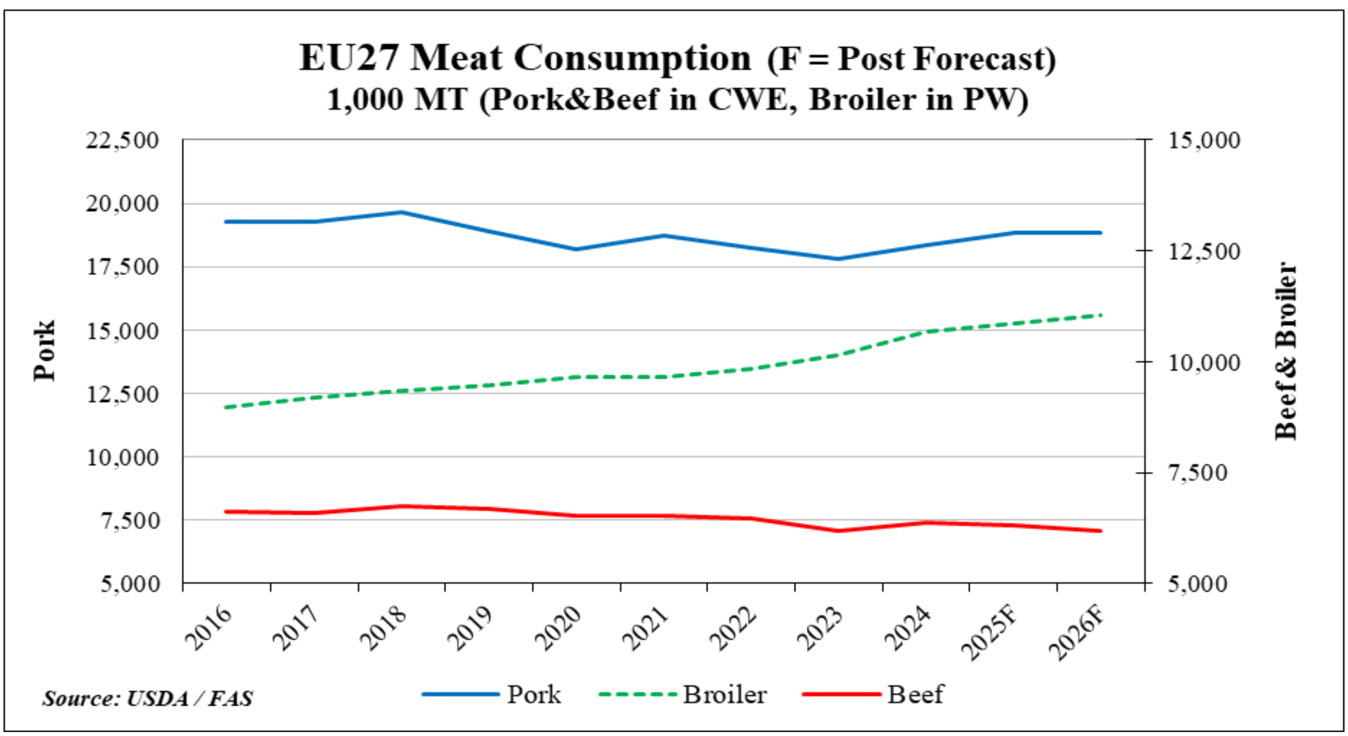
Meat, Beef and Veal	**2024**		**2025**		**2026**	
Market Year Begins	**Jan 2024**		**Jan 2025**		**Jan 2026**	
European Union	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Slaughter (Reference)	22,900	22,887	22,500	22,100	0	21,650
Beginning Stocks	0	0	0	0	0	0
Production	6,630	6,661	6,550	6,540	0	6,425
Total Imports	391	391	395	400	0	400
Total Supply	7,021	7,052	6,945	6,940	0	6,825
Total Exports	672	672	670	640	0	625
Human Dom. Consumption	6,349	6,380	6,275	6,300	0	6,200
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	6,349	6,380	6,275	6,300	0	6,200
Ending Stocks	0	0	0	0	0	0
Total Distribution	7,021	7,052	6,945	6,940	0	6,825
(1,000 HEAD), (1,000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Source: Eurostat and FAS Offices. Includes backyard slaughter.

In Line with a Downward Revision of 2025 Slaughter, Beef Production Is Cut Accordingly
The 2024 beef balance is adjusted based on new Eurostat slaughter figures, matching the adjustments made to the 2024 cattle balance. Subsequent to the revision of 2025 slaughter to a lower level, 2025 beef production is revised to a lower level accordingly. However, the reduction is somewhat tempered by the higher than anticipated average slaughter weight for 2025. This upward revision of the average slaughter

weight is based on the restricted access to young animals for fattening (for more information see the Cattle section), which, with the low feed prices and high carcass prices, inclined farmers to fatten their animals at a higher weight than normal. Overall, EU beef production is forecast to total 6.54 MMT carcass weight (CW), 1.82 percent lower than achieved in 2024.

Restricted Beef Imports and Domestic Production Are Curtailing Consumption
The lower domestic beef supply is forecast to continue buoying prices and attract beef from the global market, despite import tariffs and quotas. During the first half of 2025, EU beef imports rose by 3.84 percent. Major increases were reported by TDM for imports from Argentina, Uruguay, and the United States. During 2025, the unit value of the beef imports from Argentina and Uruguay rose significantly to €12.36 per kg (+10.3 percent) and €12,21 per kg (+15.3 percent), respectively. The unit value of beef imports from the United States only rose 0.4 percent to €18.93 per kg (source TDM), underlining traders' statements that high quality beef prices has hit the ceiling. Major reductions of beef imports by the EU were reported for the United Kingdom and Brazil. Access to Brazilian beef is restricted due to concerns about Brazil's ability to guarantee the product is free from growth hormones. During the first half of the year, EU imports of fresh, and generally high value, beef cuts increased by 1.6 percent and of generally lower value frozen beef by 10.0 percent. This trend indicates that EU demand for lower value beef cuts is growing, commonly used for processing, but also shows that the demand for fresh beef remains strong. It should be noted that demand for higher quality beef, commonly served at high-end restaurants and steak houses, has still not recovered from the level reported before the food service lockdowns during the pandemic. Due to the limited domestic EU beef production and restricted imports, EU beef consumption is on the decline with poultry and pork gaining market share (see graph). During the last quarter of 2025, imports are forecast to be temporarily elevated in anticipation of the EU Deforestation-free Supply Chain Regulation (EUDR), earlier scheduled to be implemented by the end of 2024, but postponed to the end of 2025 (see the Policy section of this report). These stocks are anticipated to press imports through 2026 to the same level as expected for 2025.



The Mercosur Deal Could Attract More Beef to the EU Market

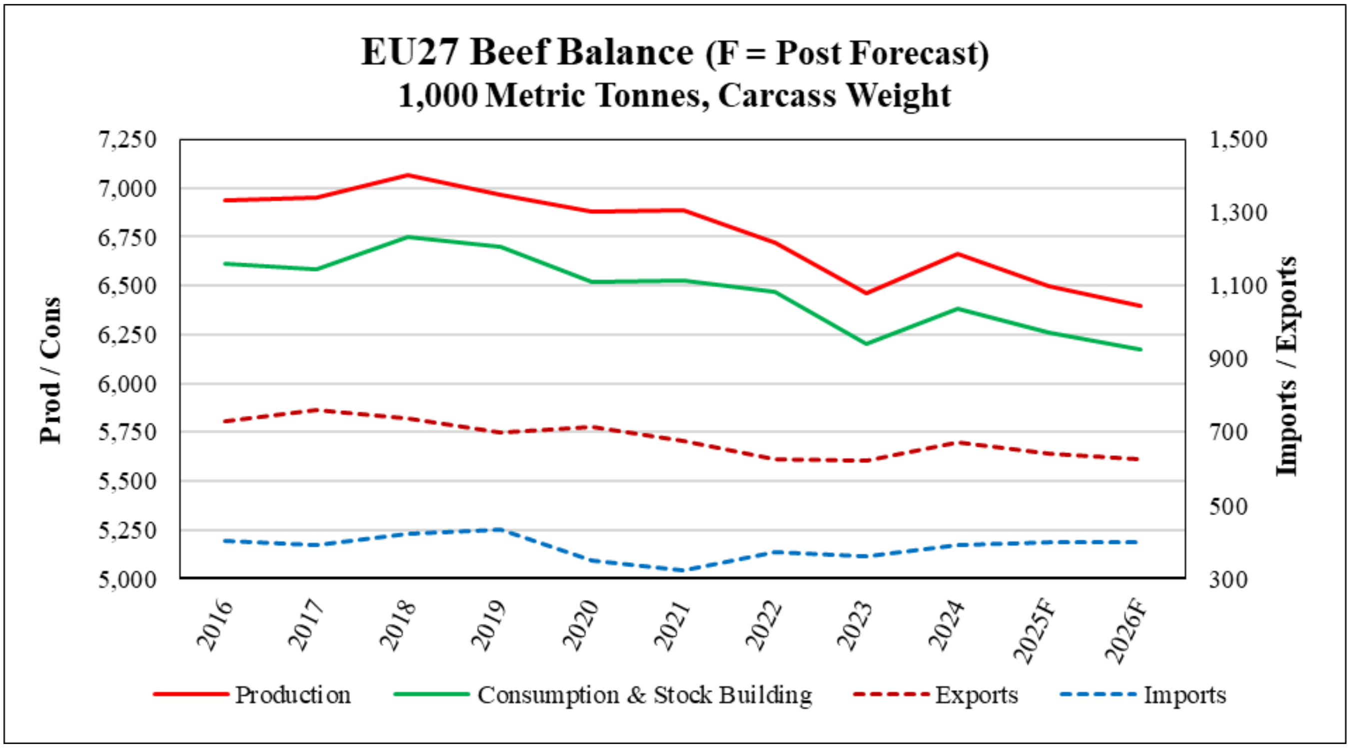
On December 6, the European Commission (EC) announced that President von der Leyen and her counterparts from the Mercosur countries finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. The agreement still needs to be approved by the European Parliament and the Council. The agreement, if approved, could potentially allow 99,000 MT PW of Mercosur beef to enter the EU market with a 7.5 percent duty (for more information see the Policy section of this report). The EU has an out-of-quota MFN (Most Favored Nation) ad-valorem equivalent duty on beef and beef products of approximately 60 percent. The Hilton Quota for high quality beef offers an import tariff of 20 percent.

With the High Price, EU Beef Is Losing Its Competitiveness on Export Markets

While the high beef prices are forecast to attract more volume to the EU market this year, beef exports are losing their competitiveness. During the first half of 2025, EU beef exports declined by 7.3 percent, with major reductions reported for shipments to Türkiye. Since the start of 2024, Türkiye switched from live cattle imports to beef imports (see Cattle section and the Livestock and Products Annual for Türkiye, published September 24, 2024). As a result, EU beef exports to Türkiye surged last year. This year, however, the high prices quoted for EU beef supplies are hampering sales on the Turkish market. Currently, the main growth market for EU beef exports is Switzerland. The second largest growth market is Algeria with Spain as the main supplier. After being virtually closed to Spanish exports between 2022 and 2023, Spanish beef exports to Algeria have soared since 2024, offsetting the reduction in sales to other EU Member States in 2024. Reportedly, the country's cold storage availability allows Algeria to import meat in addition to live animals.

In Line with Slaughter, Beef Production and Exports Are Forecast to Further Fall in 2026

In 2026, EU beef production is projected to further fall based on the lower slaughter levels and only slightly increasing to stagnant slaughter weights. With the lower EU supply, the availability of exports is also forecast to decline. The main exporting EU Member States (Poland and Ireland) remain active in marketing their beef in third countries. Export expansion is mainly foreseen in Asia. Poland recently received veterinary approval for exports to China and Vietnam. Ireland reports increased exports to Asia, in particular the Philippines and Hong Kong. Animal diseases remain a constraint for EU beef exports, for instance for Germany and earlier reported for Hungary (see Cattle section). With the confirmation of the FMD, Germany lost its recognition as "free from foot-and-mouth disease without vaccination" by the World Organization for Animal Health. Several countries (e.g. Canada, United Kingdom, Mexico, South Korea) have already put import restrictions in place on German meat.

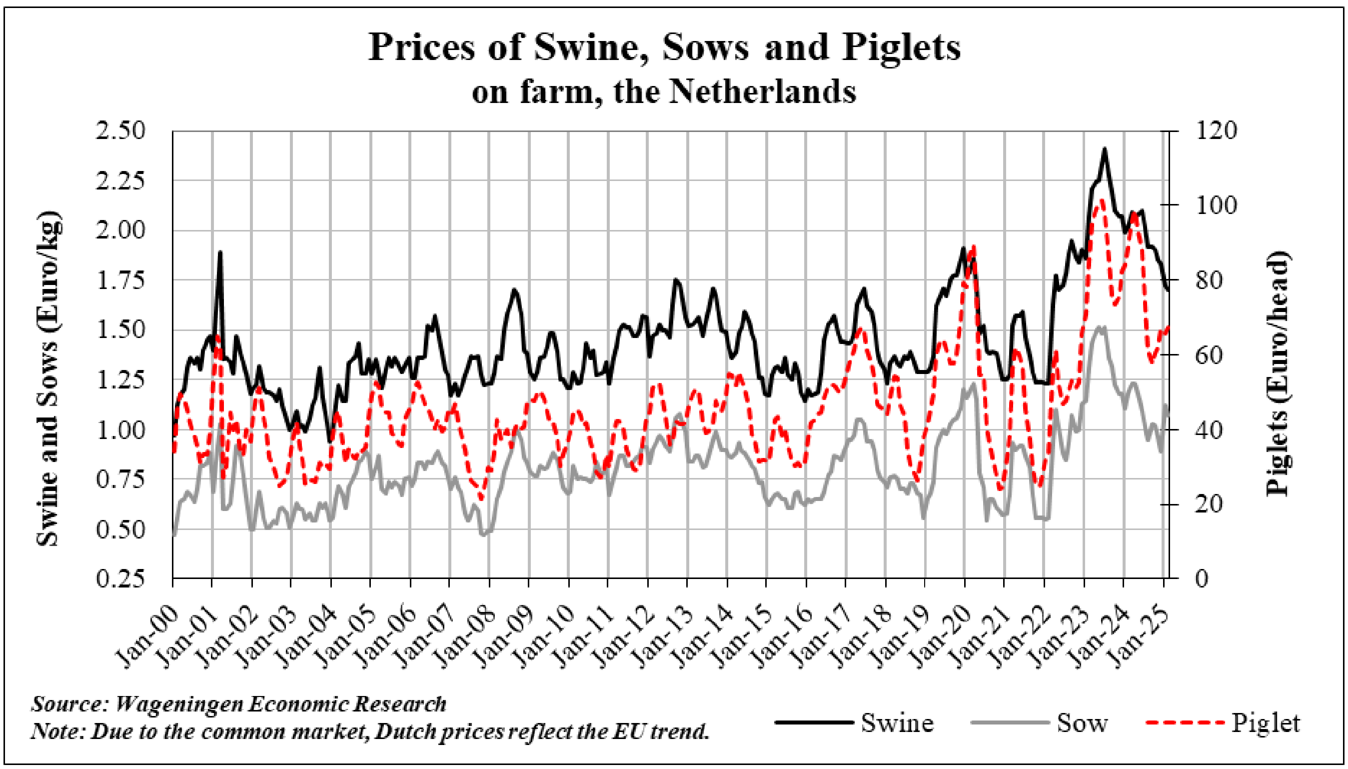


Swine

Animal Numbers, Swine	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	132,862	132,862	132,141	132,136	0	129,650
Sow Beginning Stocks	10,512	10,518	10,151	10,214	0	10,150
Production (Pig Crop)	230,700	230,700	225,000	228,000	0	227,500
Total Imports	9	9	10	8	0	8
Total Supply	363,571	363,571	357,151	360,144	0	357,158
Total Exports	1,185	1,187	1,000	800	0	740
Sow Slaughter	3,350	3,999	3,350	3,820	0	3,650
Other Slaughter	220,450	220,322	218,150	220,580	0	219,350
Total Slaughter	223,800	224,321	221,500	224,400	0	223,000
Loss and Residual	6,445	5,927	5,951	5,294	0	5,018
Ending Inventories	132,141	132,136	128,700	129,650	0	128,400
Total Distribution	363,571	363,571	357,151	360,144	0	357,158
(1,000 HEAD)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Source: Eurostat and FAS Offices. Includes backyard slaughter.

Post's Forecast of a Reduction in Slaughter Is Revised to an Expansion in 2025
FAS Post 2024 swine numbers are adjusted based on updates by Eurostat and the Trade Data Monitor (TDM) and loss figures revised accordingly. The most significant revision is the new Eurostat statistics of slaughter other than in slaughterhouses which show a higher backyard slaughter in Romania, Bulgaria, Hungary, and Croatia. In total, backyard slaughter of swine increased from 3.4 million head in 2023 to 4.0 million head in 2024. This trend can partly be explained by the favorable local feed supplies (see graph above) and good domestic demand for pork. This report's update of the 2025 balance is more significant compared to the revision of the 2024 balance. In the Semi-annual report swine slaughter was forecast to decline in 2025. Post's current forecast is a further expansion of slaughter based on an increase of official slaughter of 1.61 percent during the first half of the year. A lower supply of hogs during the remainder of the year, only a slight annual increase of 0.04 percent is anticipated. Slaughter increased most significantly in Spain (5.1 percent) and Germany (0.8 percent), and throughout Central Europe including Bulgaria (15.2 precent), Romania (9.5 precent), the Baltic States (5.3 precent), Poland (4.5 precent), Slovenia (4.4 precent), Hungary (3.6 precent), and Czechia (3.2 precent). Major reductions were reported for the Netherlands (-6.8 percent), Belgium (-2.3 percent), Denmark (-1.0 percent), France (-0.6 percent), and Italy (-0.6 percent). The increased slaughter level is due to an upward revision of the sow herd by Eurostat and by FAS Posts' forecast of a higher piglet / sow ratio and lower loss ratio than anticipated in the Semi-annual. The latter two corrections reflect the increased profitability of fattening as a result of sustained high carcass prices and low feed prices (see graphs). The carcass prices are sustained at a relatively high level due to an increase in domestic demand, particularly in Central and Southern Europe (for more information see the Pork section).



Despite Improving Margins, German Farmers Are Reluctant to Invest in Animal Welfare
The increase of German slaughter is most noteworthy taken in account the difficult situation the German swine sector has been in during the past decade. TDM trade figures show an increase of pork exports (to

EU Member States and foreign markets combined) since mid-2024. Due to the current good fattening margins, German pig producers are in a rather good economic situation and production is projected to about stabilize at the current level as it reportedly reached its maximum capacity. But despite the current improved economic situation, pig farming is not expected to experience a great comeback in Germany. German farmers continue to face major challenges due to ever-increasing demands from consumers, as well as new legal requirements regarding animal welfare and transportation. As of March 2026, a new mandatory national livestock labeling system for fattening pigs apply (for more information see the Annual and GAIN report - New Mandatory Animal Husbandry Labeling Law, published on September 26, 2023). In general, there is an unwillingness to undertake greater investments among farmers. The funds provided by the federal program to promote the conversion of animal husbandry systems, for example, are barely being utilized. The program's goal is to support pig farmers to convert their barns to free-range barn (level 3), free-range/pasture (level 4) and organic (level 5) husbandry systems. Only around €18 million of the €200 million earmarked for 2025 are used by farmers.

Polish and Spanish Slaughter Is Expanding but Will Flatten Next Year

About 45 percent of the Danish piglet exports go to Germany, with another 45 percent going to Poland. As a result of sustained low feed prices and relatively high carcass prices, Polish swine farmers are seeking to fill their stables. However, in 2026, Polish slaughter is forecast to flatten due to the limited availability and related high prices of piglets. Spain has the largest slaughter capacity in the EU and is forecast to further strengthen this position in 2025 sustained by the combination of positive fattening margins, favorable sanitary status, and improved piglet availability at more competitive prices. In 2026, Spanish slaughter is forecast to flatten due to a limited in-country pig crop, combined with regulatory hurdles ranging from animal welfare requirements entering into force in March 2026 and a lengthy process to grant approval for new production sites (for more information see the Annual of 2024). Producers are managing to expand production by acquisitions of pre-existing facilities where efficiency is being improved.

In Central Europe and Balkan Region, the Sector is Investing in Increased Efficiency

In Hungary, the downward trend in the number of pigs stopped in 2023, and continued to grow in 2024, partly because of EU co-financed farm modernization support programs. As a result, there has been a strong concentration in the industry. The Romanian swine herd shows signs of recovery being anticipated to increase in both 2025 and 2026. The robust domestic pork demand and the low feed prices support sector development. Additionally, the government-funding programs to enhance the breeding farm capacity and increase the number of delivered piglets has stimulated investment in existing or new farms, despite the ASF risk. Bulgarian slaughter increased partly due to a lack of ASF outbreaks and higher private investments in the sector. Overall, the margins of Bulgarian swine farmers were good in 2024, and the expectations are that this will continue in 2025 and 2026 if the epizootic situation is favorable (for more information see the GAIN report - Bulgarian Livestock and Products Market Update, published on July 26, 2024). In Greece and Croatia, the sector is benefitting from the pork sales to the thriving tourist sector, and in both countries the sow and total swine herd is forecast to increase in 2025.

The Danish Sector Refocused. The Dutch Sector Still Needs to Restructure

Over the last, two years, the Danish sector significantly downsized its slaughter capacity (for more information see the Annual of 2024). The Danish sector is concentrating on breeding and producing more value-added pork products emphasizing sustainability and quality, with an increased focus on the

EU domestic market. On November 18, 2024, the Danish government reached a climate agreement, instituting pivotal changes with an agricultural carbon tax and changing 15 percent of agricultural land into forest during the 2025 – 2030 period. This policy will likely lead to more intensive and larger-scale farming. Cuts of carbon emissions are planned to be made throughout the chain. The main changes, however, will be on the farm, selecting feeds with a lower climate impact and increasing the production of biogas from manure. To counter falling slaughter, Danish Crown, the main slaughterer in Denmark, raised their settlement price to the farmer to a more competitive level in early May of 2025. In addition, the company implemented a strategy to work more closely with their suppliers to ensure an optimal utilization of their slaughter capacity. As a result, Danish slaughter is forecast to increase in September of this year and stabilize in 2026. The Dutch Government has two funding programs in place to tempt intensive livestock farmers to sell their farms, in an effort to bring national nitrogen emissions down. The Wageningen University expects Dutch pork production will shrink by ten to fifteen percent in the coming years based on the signing up of swine farmers for the government stoppers programs. In 2024, incomes of Dutch pig farmers halved to €211,000 following a peak year in 2023. This was due to falling prices and increased costs for disposing manure, though this income is still well above the five-year average.

Due to Further Restructuring in Northwestern Europe, EU Total Slaughter Will Fall in 2026
The French piglet crop is expected to continue to decline in 2025. Pig producers feel the pinch of higher production costs and lack competitivity compared to the Spanish, Danish, and Dutch sector. However, French pork production is now foreseen to slowly increase in 2025 and 2026 with a higher carcass weight due to better genetics enhanced by lower feed prices. In Italy, a decrease was observed in the number of swine beginning stocks in 2025, primarily attributable to factors such as bureaucratic complexity, the limited competitiveness of enterprises, and challenges in obtaining credit. There is a notable decrease in pigs allocated for Protected Designation of Origin (DOP) products probably due to price disparity between foreign and domestic hams which may have pushed consumers to choose cheaper alternatives. Overall, for the EU, despite the positive economic factors this year, in 2026, the pig crop and subsequent slaughter is forecast to fall based on a significant restructuring of the sector in the Netherlands, and in lesser extent Belgium and Denmark, and further contraction of the French and German sector.

Pork

Meat, Swine	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	223,800	224,321	221,500	224,400	0	223,000
Beginning Stocks	0	0	0	0	0	0
Production	21,250	21,278	21,050	21,630	0	21,600
Total Imports	100	100	100	105	0	110
Total Supply	21,350	21,378	21,150	21,735	0	21,710
Total Exports	3,014	3,013	2,900	2,900	0	2,850
Human Dom. Consumption	18,336	18,365	18,250	18,835	0	18,860

Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	18,336	18,365	18,250	18,835	0	18,860
Ending Stocks	0	0	0	0	0	0
Total Distribution	21,350	21,378	21,150	21,735	0	21,710
(1,000 HEAD), (1,000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

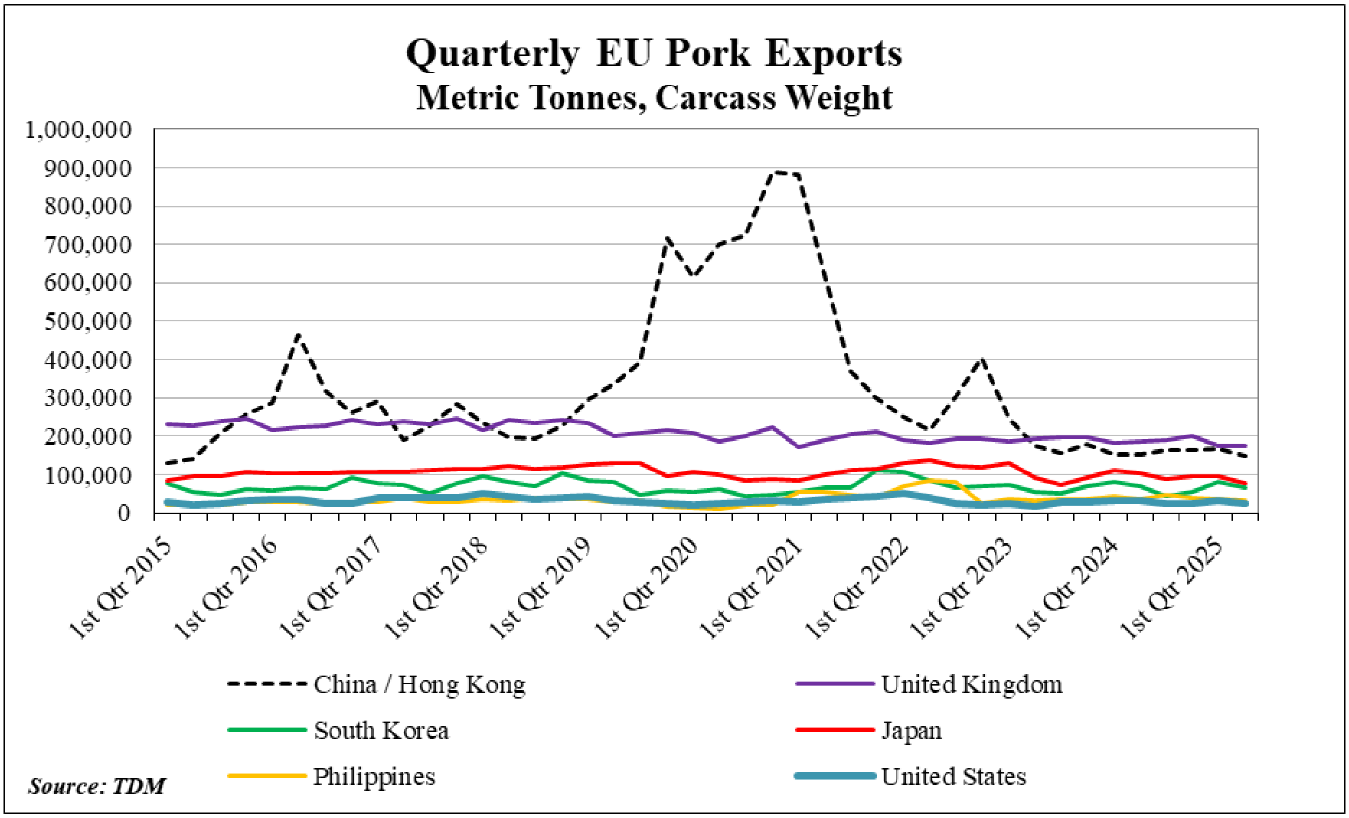
Not official USDA data. Source: Eurostat and FAS Offices. Includes backyard slaughter.

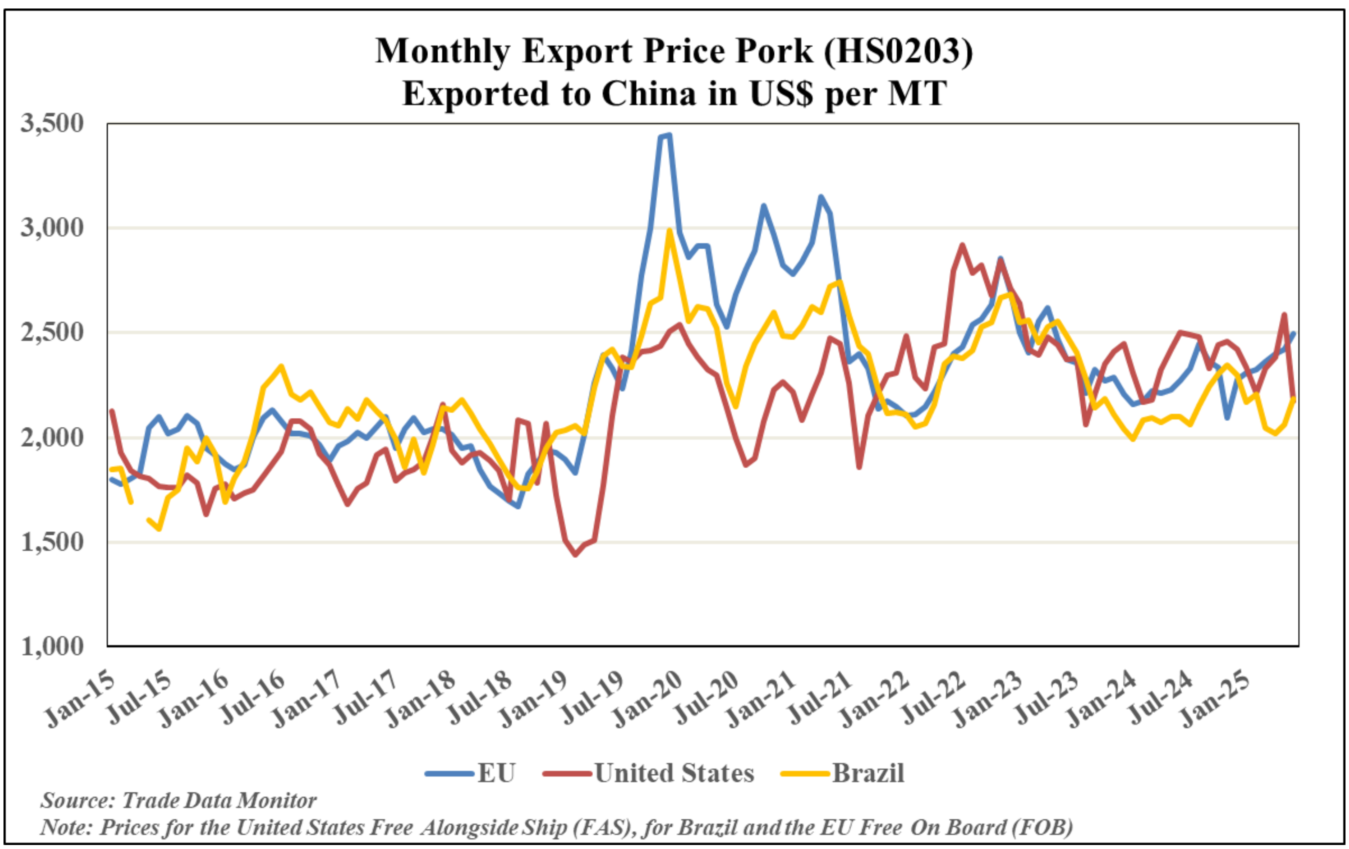
Following the Revision of Slaughter, EU Pork Production Is Revised Up for 2025

The 2024 pork balance is adjusted based on new Eurostat official and backyard slaughter statistics, matching the adjustments made to the 2024 swine balance. Concurring with the revision of 2025 slaughter, 2025 pork production is revised to a higher level, further reinforced by a higher weight at slaughter than projected in the Semi-annual report. Similar to beef, this upward revision of the average EU slaughter weight is based on the restricted access to young animals for fattening, which, combined with the low feed and high carcass prices, inclined farmers to fatten their animals at a higher weight than projected. Limited availability of piglets is reported in Poland and Spain. Higher slaughter weights are commonly correlated with a high fat content, but improved animal genetics allow higher carcass weights without affecting the leanness of the meat. Overall, 2025 EU pork production is forecast at a total 21.63 MMT carcass weight equivalent (CWE), 1.65 percent higher than achieved in 2024. Next year, EU pork production is projected to slightly decline because of a lower slaughter level, somewhat tempered by a higher slaughter weight based on sustained low feed prices.

EU Pork Exports Prices Are Rising. Spain Is Seeking to Diversify Exports in Asia

In 2025, pork *imports* are forecast to increase slightly based on improving shipments from the United Kingdom to Ireland and France. On August 29, 2025, the European Commission (EC) proposed legislation that would create a tariff rate quota (TRQ) for U.S. pork (25,000 MT PW). This legislation still needs to be adopted by the European Parliament and the Council of the EU (for more information see the Policy section). During the first half year, EU pork *exports* declined by 1.8 percent, with reductions for shipments to the United Kingdom, Japan, and the United States (see graph). The increase in the EU's pork export prices (partly as an effect of the devaluating US$ against the €) has reduced its competitiveness in export markets (see graph further below). Another barrier to EU exports is import bans imposed in response to the presence of animal diseases such as ASF and FMD, which impacted German pork exports to third countries. Due to the FMD outbreak on January 10, 2025, German pork exports beyond the EU were temporarily halted. On April 14, 2025, Germany regained its full FMD-free status by the World Organization for Animal Health (WOAH), allowing trade with third countries to resume. EU pork exports have increased, driven mainly by shipments to Asian markets such as China, Malaysia, Taiwan, and Vietnam. Spain is the world's second-largest pork exporter after the United States and is working to further diversify exports within Asia. Growth opportunities are reported in South Korea, the Philippines, and Vietnam, partly due to ASF outbreaks in those countries. This diversification helps offset stagnant exports to other EU Member States and to China, which remain Spain's primary markets.


Quarterly EU Pork Exports
Metric Tonnes, Carcass Weight
1,000,000
900,000
800,000
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0
1st Qtr 2015
1st Qtr 2016
1st Qtr 2017
1st Qtr 2018
1st Qtr 2019
1st Qtr 2020
1st Qtr 2021
1st Qtr 2022
1st Qtr 2023
1st Qtr 2024
1st Qtr 2025
China / Hong Kong
United Kingdom
South Korea
Japan
Philippines
United States
Source: TDM

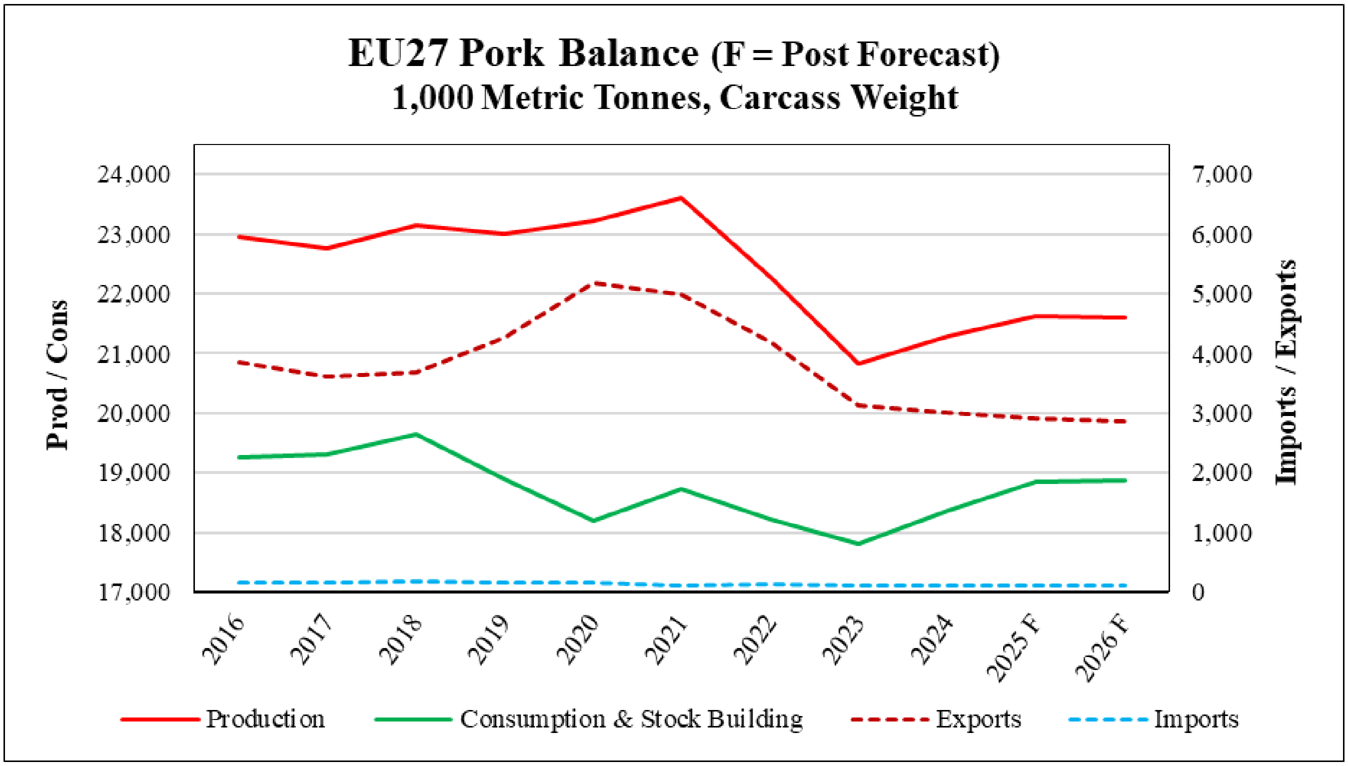

Monthly Export Price Pork (HS0203)
Exported to China in US$ per MT
3,500
3,000
2,500
2,000
1,500
1,000
Jan-15
Jul-15
Jan-16
Jul-16
Jan-17
Jul-17
Jan-18
Jul-18
Jan-19
Jul-19
Jan-20
Jul-20
Jan-21
Jul-21
Jan-22
Jul-22
Jan-23
Jul-23
Jan-24
Jul-24
Jan-25
EU
United States
Brazil
Source: Trade Data Monitor
Note: Prices for the United States Free Alongside Ship (FAS), for Brazil and the EU Free On Board (FOB)

The United Kingdom and United States Offer Specific Opportunities for EU Pork Exports
Beside Asia, the United Kingdom is a likely market to expand sales, as it is the closest sizable export market for the EU. The main items shipped to the United Kingdom are fresh boneless pork and bacon. However, as of July 2024, the United Kingdom banned the introduction of pig meat and pork products from countries where ASF virus has been detected, both in wild fauna and in pig farms. The United Kingdom only exempts heat-treated pig meat products. The closure of the British market for German pork has had a noticeable impact, as the United Kingdom was previously the largest third-country buyer of German pork. One of the factors supporting sales to the United States is the implementation of the Proposition 12 regulation in California requiring that animals are given more humane living conditions, including increased space and freedom of movement. Some EU producers benefitted from this animal welfare requirement by introducing specific production concepts (such as the Good Farming Balance of Vion). A U.S. tariff of fifteen percent on EU pork imports could however impede this trade (see Policy section). Another market for potential export growth is Mexico. On January 17, 2025, the EU and Mexico announced the conclusion of a new free trade agreement (FTA) which includes a tariff rate quota (TRQ) of 10,000 MT PW at zero percent for pork loins (see Policy section).

China Imposed Preliminary Duties on EU Pork Imports
While EU pork exports to China have dropped significantly since 2021 (see graph above), the EU swine sector still heavily depends on the Chinese market for the exports of frozen cuts with bone in and non-muscle parts of the carcass (head, tails, feet, and other non-muscle parts under HS0206, which are not under the scope of this report). As consumer demand in China is not expected to recover, Chinese import demand is not forecast to grow (for more information the GAIN report – China Livestock and Products Semi-Annual, published March 7, 2025). In addition, China started an anti-dumping investigation on imports from Danish Crown, Vion (Dutch producer), and Litera Meat (Spanish producer). On June 10, 2025, China's Ministry of Commerce announced that the investigation into unfair competition against imports of certain pork products from the EU will be extended till December 2025, which brought optimism to industry operators. However, on September 5, the Chinese ministry placed anti-dumping duties of 15.6 to 32.7 percent for companies that collaborated with the investigation, up to 62.4 percent for all other producers as from September 10. The decision is preliminary and could be lifted before the investigation is finalized in December. Because of these duties, the EU will possibly lose a market volume of about one quarter of a year of exports to China, about 150,000 MT CWE (non-muscle parts not included). For these cuts, most frozen bone-in cuts, alternative markets are South Korea, Philippines, Japan, as well as the EU domestic market. For the non-muscle parts the alternative markets are not readily available. Based on this trade dependency, the import tariff on the products under HS0206 will likely lower the price for the whole carcass paid to the farmer. It should be noted that the revenue for these products will not be totally lost as they will be destined for other countries and other markets than for food. Given the country's large swine and pork production sector and its export orientation, Spain is the EU Member State that would likely be most adversely affected by the potential Chinese antidumping duties on EU pork.

Due to the Favorable Price, EU Pork Consumption Will Continue to Rise in 2025 and 2026
In 2024, EU pork consumption recovered from the record low level reported in 2023. The increase in demand is reported in Central Europe, the Balkan Region, and Southern Europe (except Italy) where pork is a key part of the cuisine. In these regions population growth, and the thriving tourism and food service sector play an important role in the increased domestic use of pork. Another important factor is

the favorable price level of pork compared to beef and in some regions also chicken meat; pork loin prices are lower than prices quoted for chicken fillets in Central Europe. In Central Europe, pork consumption is also affected by government support. For instance, the Hungarian government imposed a ten-percent cap on retailers' profit margins as of March 17, 2025, to control food inflation. This measure applies to various types of pork, including pork leg, neck, loin, and ribs, and aims to sustain or even increase domestic pork consumption. In 2026, EU pork consumption is forecast to slightly grow as a result of the sector's focus on the domestic market. For the same reason, and the lower domestic supply, EU exports are projected to decline in 2026.



Policy

EU Vision for Agriculture and Food

On February 19, 2025, the European Commission (EC) published a Communication to the European Parliament and Council laying down its Vision for Agriculture and Food for the 2024-2029 Von der Leyen II mandate. This document will be the basis of upcoming legislative proposals and other actions taken by the European Union (EU). The Vision lays down the need for the EU to ensure "a global level playing field" for its farmers and improve their competitiveness. To do so, the EC proposes the adoption of mirror clauses, notably with regards to pesticide residues, increased border controls, and the signature of Free Trade Agreements with more trade partners. The Vision calls for boosting domestic production and diversifying import supplies to reduce strategic dependencies for products like protein-rich animal feed.

Common Agricultural Policy (CAP)

On May 14, 2025, the EC published a proposal to simplify the CAP. The proposed measures target the administrative burden, controls, and the implementation of the CAP. Notably, the proposal simplifies environmental requirements (Good Agricultural and Environmental Conditions) linked to eco-payments for farmers. The proposal is now going through the EU legislative process, and it is expected to be adopted before the end of 2025.

On July 16, 2025, the EC unveiled the much-anticipated plan for the next CAP as part of its 2028–2034 EU budget. The proposal marks a major reform, scraping the CAP's two-pillar structure and merging farm funding into broader National and Regional Partnership Plans. The new CAP aims to prioritize performance-based spending, tighter targeting of income support, and greater Member State control. While environmental objectives remain, implementation would shift largely to national discretion. More information in GAIN report - European Commission Unveils CAP Reform with Budget Cut and Structural Change.

EU Deforestation Regulation (EUDR)

The EU published the EUDR (Regulation 2023/1115) to prevent products causing deforestation from entering the EU market. The proposal targets products which are identified by the EC as the main drivers of deforestation, including cattle, raw hides, and skins of cattle and leather. For more information, please see GAIN report - European Institutions Finalize Deforestation-Free Supply Chain Regulation. On December 23, 2024, the EU published Regulation 2024/3234 amending the EUDR in the Official Journal. This amendment postpones the date of entry into application of the EUDR by one year to December 30, 2025, for most operators and June 30, 2026, for small and medium sized operators. For more information on the latest updates on EUDR, please see GAIN report - European Commission Publishes New Guidance Document and Proposes Technical Changes to the EU Deforestation Regulation.

Industrial Emissions Directive

In August 2024, the EU published the new Industrial Emissions Directive (IED) in the Official Journal. The new text amends Directive 2010/75/EU which regulates the environmental impacts of EU's large-scale, high-pollution-risk industrial installations, and extends the scope to include the largest livestock farms in the EU, considered "agro-industrial installations." Farms in the scope need to comply with specific emissions conditions and permitting requirements. The updated Directive applies to pig farms with more than 350 livestock units (LSU), poultry farms with more than 300 LSU for laying hens, and 280 LSU for broilers. Cattle farming is not included in the IED's scope.

Trade/Tariffs

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on oilseeds. Additional information is available on the website of the EC at: https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/

New Zealand: On May 1, 2024, the EU's FTA with New Zealand entered into force. The trade agreement removes all tariffs at entry into force on EU agri-food exports to New Zealand. However, this is not the case for all agri-food imports into the EU with tariffs rate quotas for some products, notably beef with a tariff rate quota of 10 000 MT PW (Metric Tons Product Weight) to be imported with reduced duty of 7.5 percent. This volume will be gradually phased in over seven years from the entry into force of the agreement. This is limited only to high quality grass-fed beef.

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new FTA. Similar to the agreement with Mercosur, the text still needs to be formally approved by the European Parliament and the EU Member States. The agreement abolishes customs duties for most goods, including agricultural products. After its ratification, the agreement will offer free access for the EU for some products and a tariff rate quota (TRQ) of 10,000 MT PW at zero percent for pork loins. Mexico has also agreed to protect some EU Geographic Indicators (GIs) including Prosciutto di Parma.

Mercosur: On December 6, 2024, the EC announced that President von der Leyen and her counterparts from four Mercosur countries (Brazilian President Lula, Argentinian President Milei, Paraguayan President Peña, and Uruguayan President Lacalle Pou) finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. In 2019, the EU had reached a preliminary agreement with Mercosur countries, but amendments were made to several sectors, including agriculture. The agreement includes a bilateral safeguard clause in case increased imports cause - or even threaten to cause - serious injury to relevant sectors, including agricultural sectors. This safeguard clause also covers imports under TRQs in the agreement. The text still needs to be formally approved by the European Parliament and the EU Member States. Under the agreement, there is a gradual phase out duties on 91 percent of EU exports to Mercosur and 92 percent of Mercosur exports to the EU. Under the new agreement, 99,000 MT PW of Mercosur beef to enter the EU market with a 7.5 percent duty. 55 Percent of the quota will consist of fresh or chilled meat and 45 percent of lower-value frozen meat.

EU-Ukraine Trade Relationship

Since 2022 until June 5, 2025, the EU had granted Ukraine full trade liberalization, suspending import duties, quotas, and trade defense measures for imports from Ukraine on a temporary basis through the Autonomous Trade Measures (ATM) Regulation. As of June 6, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA). The EC published Regulation 1132/2025 which prorates the quotas for the seven months remaining of 2025. Once thresholds are met, standard tariffs apply. On June 30, 2025, the EC announced that it has reached an agreement in principle with Ukraine on the review of the DCFTA. As part of the agreement, Ukraine committed to gradually align its agricultural production standards with the EU by 2028. The agreement includes updated TRQs for livestock products. Please note that the agreement still needs to be approved by the EU Member States. This is expected to be finalized before the end of 2025.

EU-US Trade Relationship

On July 27, 2025, United States President Trump and European EC President von der Leyen announced a political agreement on tariffs and trade to rebalance the economic relationship between the world's two largest economies. For more information on the agreement, please refer to the White House Fact

Sheet and the EC's explanatory webpage. To ensure effective implementation of the political agreement, the EU published Implementing Regulation 2025/1727 suspending its retaliatory tariffs on certain U.S. products imposed by Implementing Regulation 2025/1564. Additionally, on August 29, 2025, the EC proposed legislation that would eliminate tariffs on most U.S. industrial goods and a basket of agricultural goods. It will create also TRQs for pork (25,000 MT PW). This still needs to be adopted by the European Parliament and the Council of the EU.

Updated U.S.-EU Beef Deal

In the spring of 2019, the United States and the EU concluded an updated agreement modifying the Memorandum of Understanding (MOU) on High Quality Beef (HQB). Under the new regime, 18,500 MT PW of hormone-free raised beef is reserved for the United States, increasing to 35,000 MT PW in year seven under the new agreement. The U.S. specific quota rose to 30,200 MT PW in calendar year 2024, however, the U.S. exported to the EU only 12,960 MT, which is decrease of 9.6 percent from 14,335 MT PW in 2023. Using only 43 percent of the quota means that 17,240 MT PW of the U.S. HQB quota went unused, valuing over $322 million (estimate) of lost export opportunity. For 2025, the HQB quota increased to 32,600 MT PW.

U.S. HQB Exports to the EU (MT PW)

Calendar Year	Amount available	Actual import	Unused quota	Filled quota (%)
2024	30,200	12,960	17,240	43
2023	27,800	14,335	13,465	52
2022	25,400	13,502	11,898	53

Source: TDM and FAS Brussels

New EU Animal Welfare Legislation (AW)

In February 2025, as part of its Vision for Agriculture and Food, the EC announced its intention to revise the existing EU animal welfare legislation, including its commitment to phase out cages. This includes:

- Regulation (EC) No 1/2005 on the protection of animals during transport.
- Regulation (EC) No 1099/2009 on the protection of animals at the time of killing.
- Directives on on-farm welfare, including:
  - Directive 98/58/EC (horizontal)
  - Directive 2008/119/EC on calves

The EC aims to present a legislative proposal for the first sectors by Q4 2026. For more information please see GAIN report - EU Launches Call for Evidence on New On-Farm Animal Welfare Legislation.

The new EC's 2023 proposal on the protection of animals during transport is currently progressing through the legislative process and is under review by both the European Parliament and the Council. The proposal introduces new requirements for animals imported from third countries into the EU, necessitating additional training for inspectors, transporters, and veterinarians. As such it may potentially increase the administrative and financial burden across the entire process. The European Parliament is expected to vote on the file, including amendments (2023/0448(COD)) on October 2, 2025, while Council discussions continue in parallel. More information can be found in GAIN report - European Union: EU Proposes New Regulation on Animal Welfare During Transportation.

Veterinary Medicinal Products Regulation (VMP Regulation)

On January 28, 2022, the EU implemented the new framework for the Regulation (EU) 2019/6 on Veterinary Medicinal Products (VMPs). The main objectives of the legislation are as follows:

- to establish a modern, innovative and fit for purpose legal framework for VMPs,
- to provide incentives to stimulate innovation for VMPs and increase their availability,
- to strengthen the EU´s efforts to fight antimicrobial resistance.

On July 20, 2022, the EC adopted Implementing Regulation (EU) 2022/1255 that provided a list of antimicrobials reserved for human medicine. In February 2023, the EC adopted Delegated Act 2023/905 implementing Article 118 of the VMP Regulation imposing limitations on the use of antimicrobials for animals exported from third countries into the EU.

On February 12, 2024, Commission Implementing Regulation (EU) 2024/399 was published in the Official Journal amending model certificates for the entry into the EU of consignments of certain products of animal origin and certain categories of animals. The new models will be implemented by the respective exporting countries.

On October 7, 2024, the EU published Regulation (EU) 2024/2598 laying down the list of third countries or regions authorized for the entry of certain animals and products of animal origin intended for human consumption. This Regulation will start to apply from September 3, 2026. It is important to note that the EU is requiring the two additional animal health attestations to be included on the health certificates by September 3, 2024, yet not requiring the new attestations to be attested until the actual implementation of the VMP Regulation. Between these two dates, trading partners are permitted to either delete or cross out the new attestations.

African Swine Fever (ASF) Situation Update

African Swine Fever (ASF) was initially discovered in Lithuania and Poland in 2014. ASF has continued to spread across EU Member States. Since 2014, the EU implemented several special control measures, including zoning to tackle the disease. For the most recent list of initiatives taken or supported by the EC please see this table.

As for the first half of 2025, there were several outbreaks across Europe:

- ASF in domestic pigs: Estonia (8), Greece (4), Croatia (16), Italy (1), Lithuania (5), Latvia (7), Poland (14), Romania (281), Slovakia (1), Bosnia and Herzegovina (18), Moldova (45), Serbia (102), Ukraine (17).
- ASF in wild boar: Bulgaria (274), Czech Republic (1), Germany (1774), Estonia (100), Greece (74), Croatia (14), Hungary (676), Italy (525), Lithuania (511), Latvia (786), Poland (2667), Romania (153), Slovakia (159), Bosnia and Herzegovina (15), Moldova (16), North Macedonia (7), Serbia (42), Ukraine (29).

More information about the current ASF situation in the EU is available online at EU ASF website: [African swine fever - EC]

Foot and Mouth (FMD) Disease Outbreak

In 2025, Europe experienced several outbreaks of Foot-and-Mouth Disease (FMD). In January, Germany reported one case, followed by Hungary with five and Slovakia with six outbreaks in March. In response to the outbreaks, several Member States (MS), particularly those bordering Hungary and Slovakia, swiftly implemented import bans on animals and products that could carry the virus. The European Commission adopted several Commission Implementing Decisions concerning interim emergency measures, demarcating at EU level the areas to be included by MS in the restricted zone around the outbreak establishment and setting the duration of these restricted zones. On April 14, 2025, the World Organization for Animal Health (WOAH) fully reinstated Germany's "FMD-free country where vaccination is not practiced" status, effective immediately.

The last confirmed outbreak of FMD in the EU prior to 2025 occurred in the United Kingdom in 2007. More information about the current ASF situation in the EU is available online at EU ASF website: [Foot and mouth disease - European Commission]

Lumpy Skin Disease (LSD) Disease Outbreak

In 2025, the EU faced its first outbreaks of Lumpy Skin Disease (LSD), a viral disease affecting bovine animals, with cases reported in Italy and France. LSD, caused by a Capripoxvirus, is primarily transmitted by biting insects and under EU Animal Health Law it is classified as a disease that does not normally occur in the EU and requires immediate eradication upon detection. The disease emerged in Sardinia, Italy, in June, spreading to Lombardy and prompting emergency measures, including restricted zones and vaccination campaigns targeting 300,000 cattle. France reported its first outbreak later that month, leading to similar containment efforts and vaccination of 350,000 cattle. The EC continues to closely monitor the situation and may adopt additional emergency measures to support eradication and prevent further spread. More information about the current ASF situation in the EU is available online at EU ASF website: [Lumpy Skin Disease - EC]

DISCLAIMER

The numbers in the PSDs in this report are not official USDA numbers, but they result from a collaborative effort by FAS EU offices to consolidate PSDs from all 27 EU Member States.

This report is the result of collaboration among the following EU FAS colleagues:

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Tania de Belder from FAS Brussels covering EU Policies, Belgium, and Luxembourg
Ornella Bettini from FAS Rome covering Italy
Mila Boshnakova from FAS Sofia covering Bulgaria
Monica Dobrescu from FAS Bucharest covering Romania
Dimosthenis Faniadis from FAS Rome covering Greece
Bob Flach from FAS The Hague covering the Netherlands and Nordic countries

Jana Fischer from FAS Prague covering the Czech Republic and Slovak Republic
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Roswitha Krautgartner from FAS Vienna covering Austria
Andreja Misir from FAS Zagreb covering Croatia
Antonia Rudolf from FAS Berlin covering Germany
Marta Guerrero from FAS Madrid covering Portugal and Spain

Note: Effective January 1, 2021, the United Kingdom (UK) completed its departure from the European Union (EU). In this report, if not otherwise indicated, the term EU refers to the current EU27 (without the UK).

Conversion Rates: As a result of continuous efforts to improve data reliability, the "New Post" trade forecasts in this report reflect new conversion rates. Historical data revisions (from 2005 onward) were published in April 2020 in the PSD database (http://www.fas.usda.gov/psdonline).

Technical Note: The definition of Carcass Weight Equivalent/Product Weight Equivalent remains the same. All quantities (beef and pork) are reported in Carcass Weight Equivalent (CWE) unless otherwise noted as Product Weight Equivalent (PWE). CWE is the weight of an animal after slaughter and removal of internal organs, head, and skin. PWE is the actual weight of the meat product exported.

ABBREVIATIONS

EC: European Commission
EU: All twenty-seven Member States of the European Union.
MS: An EU Member State

Recent Livestock Related GAIN Reports from FAS Posts in Europe:

Country	Title	Date
EU	EU Launches Call for Evidence on New On-Farm Animal Welfare Legislation	07/15/25
Spain	Spanish Dried Fodder Production Expansion to Support Export Recovery	07/07/25
EU	Dairy and Products Semi-annual	05/21/25
EU	Livestock and Products Semi-annual	02/25/25
EU	EU Deforestation Regulation - Revised Implementation Timeline for 2025	02/12/25
Germany	First Outbreak of Foot-and-Mouth-Disease in Germany since 1988	02/02/25
UK	UK Imposes Foot and Mouth Restrictions on Germany	01/22/25
Denmark	Bluetongue Disease Reaches Three Nordic Countries	11/06/24
EU	Livestock and Products Annual	09/06/24
Netherlands	Bluetongue Disease Outbreak Impacting Sheep and Dairy Sector Despite Vaccine	08/22/24
Bulgaria	Livestock and Products Market Update	07/26/24
Netherlands	Dutch Loss of Manure Derogation	06/06/24
EU	Dairy and Products Semi-annual	05/22/24
EU	Livestock and Products Semi-annual	03/06/24

Czech Rep.	FAS Prague Showcases American Food Products During Thanksgiving Celebration	01/12/24
Bulgaria	Direct Versus Indirect Trade - Bulgaria's Hidden Market for US Ag Exports	12/21/23
Germany	New Mandatory Animal Husbandry Labeling Law	09/26/23
Sweden	First Case of African Swine Fever Found in Wild Boars in Sweden	09/22/23
EU	Livestock and Products Annual	09/15/23
Spain	Spanish Swine and Pork Production Driven Down by Lower Exports and Animal Welfare Regulations	09/09/23
Bosnia and Herzegovina	Veterinary Authorities Report First Outbreak of ASF in Bosnia and Herzegovina	07/06/23
Spain	Spanish Cattle Production May Decline Driven by Reduction of Exports and Drought	06/05/23

These GAIN Reports, and more, can be downloaded from the FAS website:
https://gain.fas.usda.gov/#/search

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Attachments:

No Attachments