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Report Highlights:

The EU cattle herd is forecast to shrink further in 2026 and 2027 because of high input costs, strict and burdensome EU regulations, and the spread of animal diseases. EU domestic beef prices are anticipated to rise due to the limited domestic supply, the EU import ban on Brazilian beef, and constrained availability from alternative sources. The EU swine sector is still subject to the swine cycle. Good revenues in 2025 caused elevated slaughter during the first half of 2026. The findings of African Swine Fever in Spain in December 2025, however, resulted in export restrictions and an oversupply of pork on the EU market. This new reality is projected to press pork production and exports during the second half of 2026 and in 2027.

Executive Summary – EU Meat Sector Diverges from Global Market

Cattle and Beef – Further Rising Beef Prices Ahead with Ban on Brazilian Beef

Herd Size and Calf Crop: Despite high carcass prices, the herd size will continue to shrink in 2026 and 2027 because of high input costs, mounting regulations, and spread of animal diseases. A limited expansion of the beef cow herd is forecast in Central and Southern EU.

Slaughter and Trade: With the lower supply of animals, slaughter will inevitably fall but could temporarily rise in the summer. EU domestic, as well as international, trade of live cattle is hampered by animal diseases.

Beef Production: In line with falling slaughter, EU beef production is forecast to decline in 2026 and 2027, somewhat tempered by higher slaughter weights as relatively more adult cattle are slaughtered.

Beef Domestic Sales and Trade: The EU ban on Brazilian beef and the enforcement of the EU Deforestation-free supply chain Regulation (EUDR) will buoy beef prices and further squeeze beef consumption. EU beef exports will shrink based on the falling supply.

Swine and Pork – The Sector Restructures and Increasingly Focuses on the EU Market

Herd Size and Pig Crop: The pig crop peaked in early 2026 due to a large initial sow herd. But EU carcass prices have plummeted due to the detection of African swine fever (ASF) in Spain in December 2025. In 2027, both piglet production and swine herd will gradually decline.

Slaughter and Trade: The hike of slaughter during the first half of 2026 is forecast to level off as farmers have limited their uptake of new piglets in response to the lower profitability. In 2027, slaughter is forecast to fall throughout the EU with the most significant cuts in Western EU.

Pork Production: In line with higher slaughter and heavier weights, EU pork production will increase in 2026. In 2027, EU pork production is forecast to decline for the first time since 2023. Major reductions are expected in Spain, France, Germany, the Netherlands, and Hungary.

Pork Domestic Sales and Trade: Spanish pork banned by export markets is redirected to the EU domestic markets, while other EU producers fail to fully replace Spanish pork on third country markets. The rising domestic supply is supporting sales in Southern and Central Europe.

Cattle

Animal Numbers, Cattle	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks	71,896	71,896	70,850	71,583	0	71,500
Dairy Cows Beg. Stocks	19,222	19,222	19,050	19,015	0	18,820
Beef Cows Beg. Stocks	10,082	10,082	9,950	10,082	0	10,000
Production (Calf Crop)	22,700	23,450	22,500	23,000	0	22,800
Total Imports	16	16	15	10	0	8
Total Supply	94,612	95,362	93,365	94,593	0	94,308
Total Exports	636	761	670	600	0	600
Cow Slaughter	9,900	9,754	9,700	9,460	0	9,300
Calf Slaughter	5,150	5,035	5,080	4,885	0	4,800
Other Slaughter	6,600	6,783	6,570	6,685	0	6,850
Total Slaughter	21,650	21,572	21,350	21,030	0	20,950
Loss and Residual	1,476	1,446	1,395	1,463	0	1,398
Ending Inventories	70,850	71,583	69,950	71,500	0	71,360
Total Distribution	94,612	95,362	93,365	94,593	0	94,308
(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. The TDM 2025 export figure is revised by deducting abnormal high monthly exports to Algeria, Egypt, Brazil, and the United States.

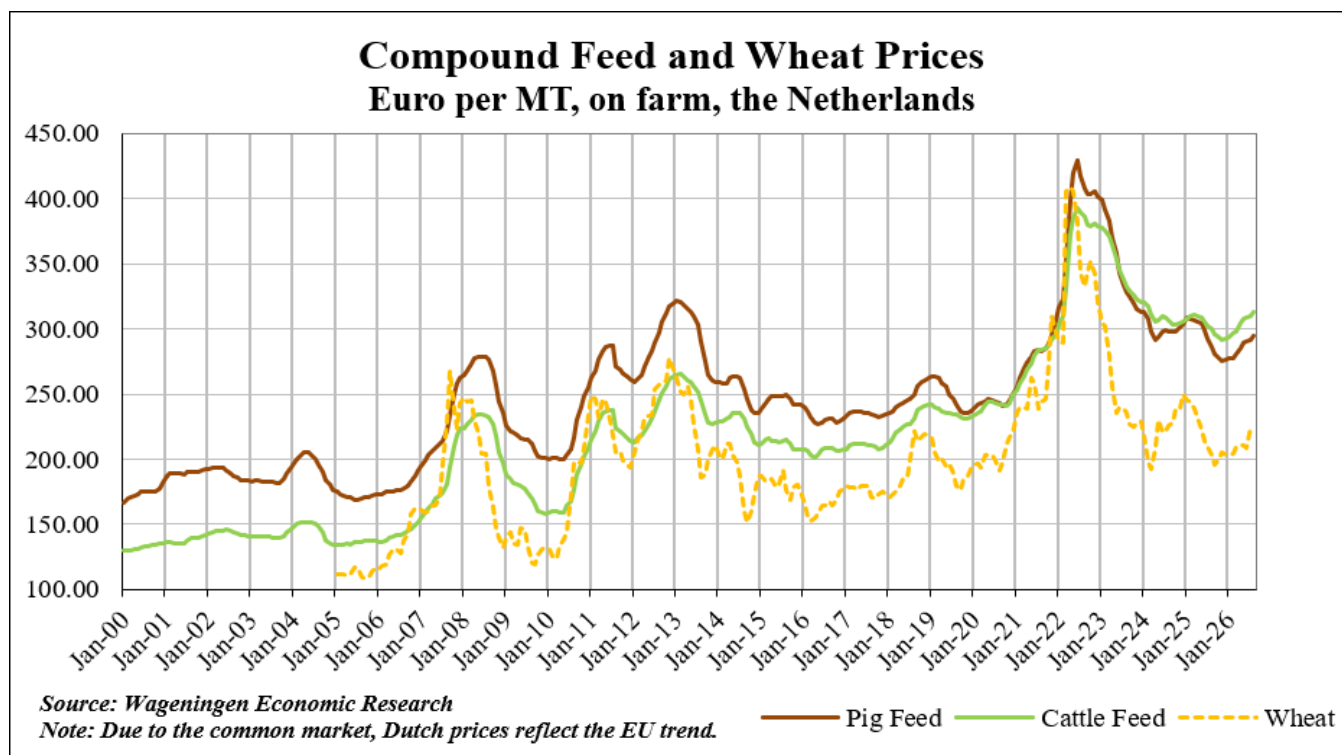
The Cattle Herd Is Contracting Due to High Costs, Strict Regulations, and Animal Diseases

The 2025 EU cattle ending inventory has been revised upwards based on the latest Eurostat census and balanced by a higher calf crop and lower slaughter. The resultant higher calf/cow ratio can be explained by a recovery from the [Bluetongue Virus \(BTV\) outbreaks](#), which were most severe in 2024. The EU cattle herd has been contracting since 2017 by on average nearly one million head per year. During 2020 – 2024 there was an acceleration of decline up to a reduction of 1.85 million animals in 2024. During 2025, the contraction slowed down at 1.05 million head partly because of the relatively high milk price (see graph below) which encouraged farmers to hold on to their cattle. Another reason for the slower pace of contraction was the elevated price for beef carcasses which incentivized farmers in mainly Central Europe to build their beef cow herd. However, the underlying reasons for the herd contraction haven't changed since 2017. As stated in earlier reports, cattle farmers' incomes are under pressure by high costs of energy, labor, and land. Other critical factors include stringent environmental and animal welfare regulations and a shortage of successors for family farms. These challenges are present to varying degrees across most EU Member States. Ultimately, the continuous influx of new EU mandates demands additional financial investment and management adaptations, further straining profit margins. This ongoing accumulation of requirements has created significant uncertainty among cattle farmers. The ongoing spread of livestock diseases also plays an increasing negative role for both the dairy and beef sector, specifically Foot and Mouth Disease (FMD), BTV, (with several serotypes present: BTV-8, BTV-4 and more recently BTV-3), Epizootic Hemorrhagic Disease (EHD), and Lumpy Skin Disease

(LSD). While the spread is reduced by vaccination and natural immunity, new diseases and varieties are evolving and spreading. The above-mentioned diseases generally don't cause mass mortality but negatively affect productivity, such as calf production and milk deliveries, and the transport of animals.

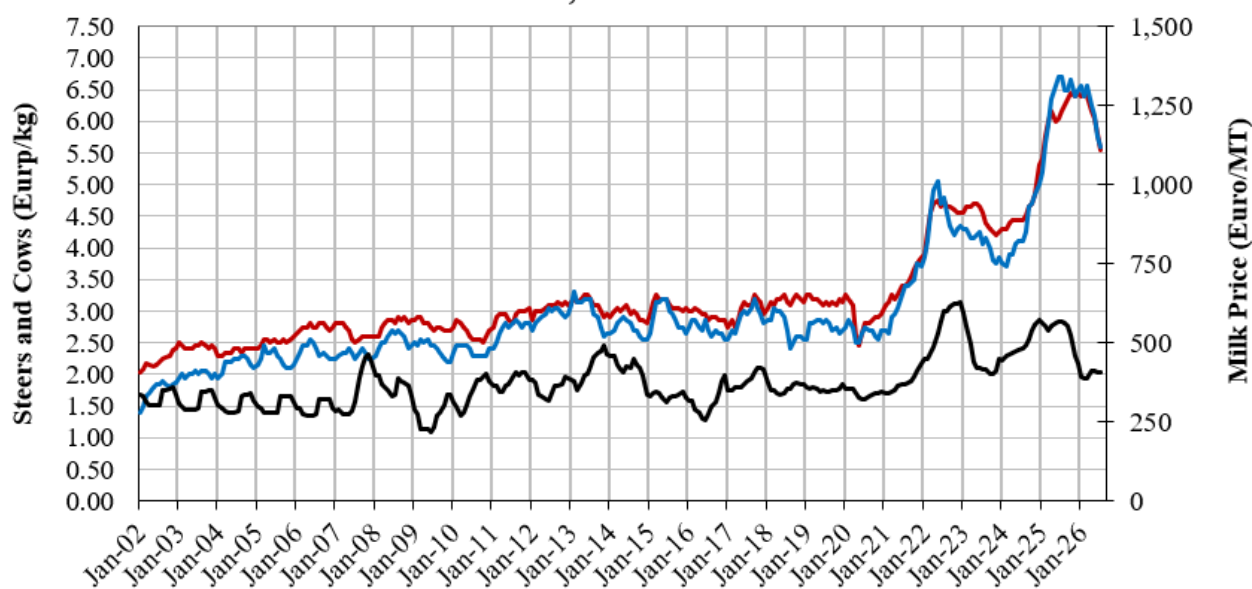
Despite a Drought-Driven Spike, Slaughter Is Forecast to Decline in 2026 and 2027

With the lower supply of animals and farmers holding to their cattle, EU official slaughter declined by 3.85¹ percent during the first half year of 2026. In absolute terms, in 2026, the most significant reductions of slaughter are reported in France, Germany, Belgium, and Austria. Extrapolating this reduced slaughter level through the whole year, the EU cattle herd will expand for the first time in ten years. However, as of July 2026, a heat wave and drought entered the EU (see [Grain and Feed Quarterly](#), published July 30, 2026) which is forecast to negatively affect the fodder supply until the next season. The extreme weather conditions are probably most pronounced in Hungary and France where more frequent heatwaves are reaching extreme temperatures. The shortage and low fodder quality and increased risk of aflatoxin contamination in corn and silage are likely to negatively affect reproductive performance, feed intake, and mortality rates. The limited feed availability is expected to accelerate livestock slaughter schedules in the second half of 2026. Overall EU cattle slaughter is forecast to decline by about 2.5 percent during 2026, resulting in slightly lower ending inventories at the end of the year. Taking in mind the relatively low milk prices and high beef prices, the reduction is anticipated to be more pronounced for the dairy cow herd than the beef cow herd. With the smaller cow herd, the supply of young animals will inevitably fall further in 2027. Based on the lower supply and increasing incentive to build the beef cattle, herd slaughter is forecast to decline by 0.38 percent next year. Below is a summary of the situation in the different EU Member States.



¹ The official 2026 half year cattle and swine slaughter figures are based on a Post estimate of the Danish June slaughter figure.

Prices of Steer and Cow Carcasses, and Milk on farm, the Netherlands



Source: Wageningen Economic Research

Note: Due to the common market, Dutch prices reflect the EU trend.

— Steers — Cows — Milk Price

In Contrast to the Contracting French Sector, the Sector in Germany Tends to a Stabilization

The French cattle herd is projected to decline further in 2026 and 2027. High overall production costs continue to squeeze the fattening sector. Both dairy and beef herds are shrinking as less competitive dairy farmers exit the industry and others cull older cows. Since 2020, insect-borne disease outbreaks like the BTV in the north and EHD in the south have caused abortions and lower fertility. Additionally, a 2025 LSD outbreak forced the culling of hundreds of cows in the southeast, though a vaccination program halted its spread in 2026. Finally, a severe summer drought in 2026 has drastically cut forage availability, likely forcing further herd reductions late this year. The German dairy as well as beef cow herd are forecast to slightly expand this year supporting a higher calf crop. However, stricter animal welfare standards are adding to the already high costs of production. In Germany, many retailers announced that they are planning to source beef and milk only from farms which adhere to higher standards of animal welfare. There are five levels of standards. Higher levels require more space per animal, genetically modified (GM)-free feed, and outdoor access (for more information see the previous [Annual](#)).

The Dutch and Belgian Dairy Sectors Are Restricted by Environmental Regulations

On June 26, 2026, the Dutch Cabinet has proposed a nitrogen plan worth €20 billion until 2035 to reduce nitrogen emissions from agriculture and other sectors and restore nature. The plan introduces new farm-level ammonia emission standards, a maximum of 2.6 livestock units per hectare by 2035 for dairy farming, and nitrogen-sensitive zones around specified nature reserves. The plan has support in Parliament but must still be approved by the Senate. How this will precisely affect farmers remains unclear, but in the long term, the water quality and nitrogen regulations will inevitably result in less animals per farm, and to a lesser extent farm sales and buyouts. Also, the Belgian cattle sector is under

pressure by environmental regulations, especially in Flanders, where it is failing to meet its conservation obligations under the EU Habitats Directive. Although beef production volumes are falling, cattle prices and the sector's total production value have increased strongly. A similar situation was anticipated in Ireland, where the EU manure derogation was expected to end in January 2026. However, on December 9, 2025, Ireland was granted a further three-year extension to its nitrate derogation, allowing Irish dairy and beef farmers to avoid more stringent EU nitrogen restrictions. This extension was granted under certain conditions related to grassland and nutrient management which favor dairy farming above beef cattle farming. As a result, the dairy cow herd is forecast to expand and the beef cow herd to contract in 2026. After a reduction in 2026, slaughter is projected to recover in 2027. For more information see GAIN report - [Ireland's Nitrate Derogation Extended Another Three Years](#), published December 31, 2025.

The Beef Cattle Herd is Expanding in Central Europe, the Balkan Region, and Spain

Stagnant or even expanding herd numbers are reported in Central Europe (Poland, Czechia, Slovakia, Slovenia, and Romania) and the Balkan Region (Bulgaria and Greece) driven by the rising share of commercial farms and a shift from dairy to beef production. In Romania and Bulgaria, for instance, the beef cow number is forecast to keep rising in both 2026 and 2027, encouraged by good pasture situation, on one side, and strong beef demand, on the other. Additionally, the falling milk prices, in opposition with the beef prices, represent another factor stimulating farmers' orientation to beef breeds. In Poland, cattle inventories are even forecast to increase significantly due to high profitability of beef production observed since 2025. While dairy cow numbers are expected to further decrease in 2027, as less efficient and older cows are being slaughtered. Expansion of the cattle herd is also reported in Spain. After hitting a bottom at the end of 2024, total cattle numbers started a pace of recovery in 2025, which is forecast to continue in 2026 and 2027. The expansion of the Spanish herd is for a large part based on the import of animals for fattening. The beef sector benefits from historically high global beef prices and strong EU demand. The fastest-growing cattle categories are calves which are a key input for domestic feedlots. However, calves demand in the second half of 2026 is expected to be negatively affected by the limited pasture availability and rising feed costs eroding margins.

EU Cattle Exports Are Constrained by the Spread of Animal Diseases

Exports of live cattle to third countries are an important revenue source 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. In 2023, Türkiye was the main destination for EU cattle exports. But 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 previous [Annual](#)). In 2025 and 2026, EU exports of live cattle to Türkiye were nearly absent. Currently the main destinations for EU cattle exports are Israel, non-EU Balkan countries (Kosovo, Albania, Bosnia and Herzegovina, Serbia, and Montenegro) and the United Kingdom. During 2025 and 2026, several EU Member States have seen sales of their cattle restricted due to the spread of animal diseases such as FMD, BTV, and LSD. For instance, BTV outbreaks in Poland have severely hit ruminant exports, excluding two-thirds of the country's territory from trade. Montenegro, Ukraine, Russia, Belarus, Kazakhstan, and Kyrgyzstan introduced bans. Türkiye and Algeria also enforce strict regional buffer zones. Specific restrictions might also apply to BTV-vaccinated animals, but currently the BTV vaccine available in Poland is not financed by the government. 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). During the first half year of 2026,

major reductions of EU cattle exports are reported for shipments to Morocco and Lebanon while expansion of exports is limited to slight increases to Tunisia, the Gaza Strip and West Bank, Azerbaijan, and Kazakhstan. Overall, EU cattle exports are forecast to decline to 600,000 head in 2026 and remain at that level in 2027.

Beef

Meat, Beef and Veal	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	21,650	21,572	21,350	21,030	0	20,950
Beginning Stocks	0	0	0	0	0	0
Production	6,410	6,390	6,350	6,335	0	6,300
Total Imports	463	462	465	480	0	400
Total Supply	6,873	6,852	6,815	6,815	0	6,700
Total Exports	595	596	575	560	0	500
Human Dom. Consumption	6,278	6,256	6,240	6,255	0	6,200
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	6,278	6,256	6,240	6,255	0	6,200
Ending Stocks	0	0	0	0	0	0
Total Distribution	6,873	6,852	6,815	6,815	0	6,700
(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.

Increased Slaughter Weights Partly Mitigate Tight Domestic Beef Supplies

The 2025 EU beef balance is revised with updated Eurostat slaughter statistics. Although the revision is only minor, it underscores the falling domestic beef supply in the EU. In 2026, lower cattle slaughter is partly outbalanced by the heavier weights at official slaughter, which on average increased by more than two percent to 305 kg during the first half year of 2026. The higher slaughter weights can be explained by the relatively large share of adult cattle slaughtered. It should be noted that the heat wave and drought are expected to somewhat lower the average slaughter weights. For example, in Spain, recurring heatwaves are reducing carcass weights and increasing feed costs in the context of limited pasture availability. As a result of the limited domestic beef supply, EU beef imports rose by 17.5 percent during the first half of 2026, almost fully attributable to imports from Brazil, which increased by 56 percent.

New Veterinary Rules Are Likely to Block EU Beef Imports from Brazil for Two Years

On January 20, 2026, the European Commission (EC) and its counterparts from the Mercosur countries [signed](#) a political agreement for an EU-Mercosur partnership. The agreement allows 99,000 MT Product Weight Equivalent (PWE) of Mercosur beef to enter the EU market with a 7.5 percent duty (for more information see the Policy section of this report). However, EU beef imports from Brazil are anticipated to be significantly affected by the Veterinary Medicinal Products Regulation (VMPR). The EU identified third countries that have “proven their compliance with the EU restrictions on antimicrobial use in food-

producing animals.” The rules formally apply on September 3, 2026. Because according to the EC, Brazil has not proven to be compliant it is no longer be able to export livestock products to the EU. From August 24 to September 3, EC auditors have been [inspecting](#) poultry and honey producers in Brazil to assess compliance with EU antimicrobial rules, but not beef, and the checks will reportedly finish too late to prevent an expected halt to exports by September 3. In 2025, the EU imported 130,000 MT Carcass Weight Equivalent (CWE) of beef from Brazil, with a value of \$813 million, covering 28 percent of the imported beef volume. About sixty percent of the EU beef imports from Brazil is frozen, annually 50,000 to 80,000 MT CWE, which is about half of the frozen beef imported by the EU.

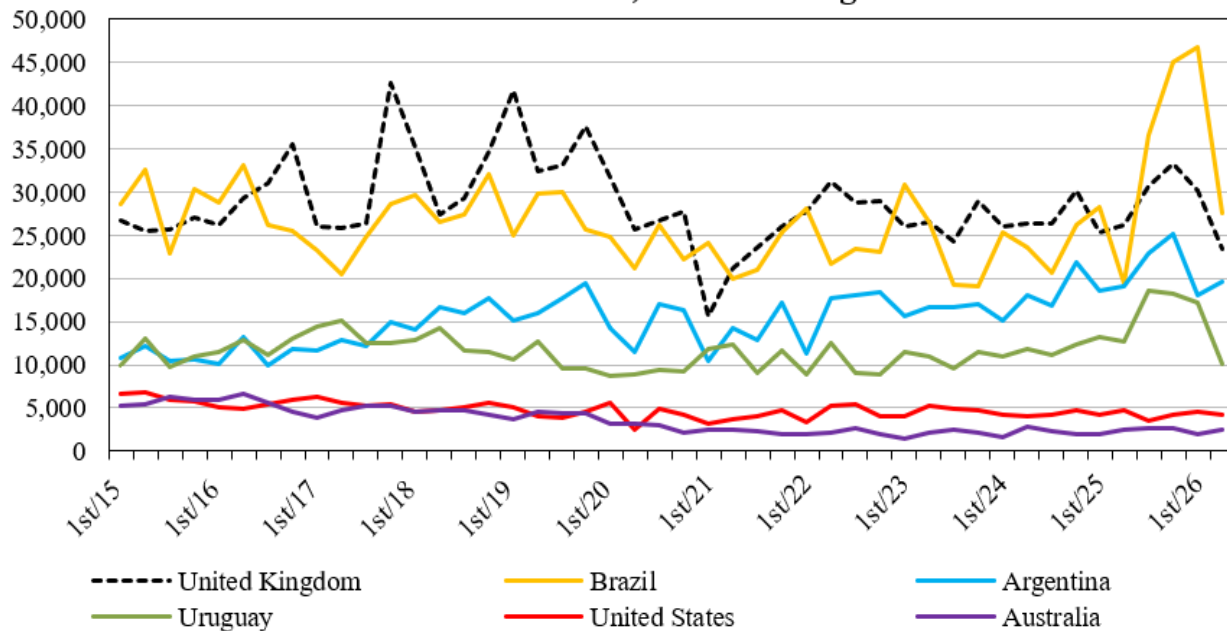
In 2026 and 2027 EU Imports Will Fall Due to the VMPP, EUDR, and Limited Global Supply

As a result, in 2026, the EU will lose nearly a quarter year of beef imports from Brazil. Assuming stock building of Brazilian beef took place during the third quarter of 2026 and imports from alternative sources will reach a maximum level during the full second half of the year (historically about 100,000 MT CWE per quarter), EU beef imports are estimated to fall to 480,000 MT CWE. The main alternative sources are the United Kingdom, Argentina, Uruguay, the United States, Australia, New Zealand, and a few African countries, such as Namibia and Botswana. The other top five suppliers of frozen beef to the EU are the United Kingdom, Argentina, Uruguay, and Namibia. Stock building of beef is further buoyed by the enforcement of the EU Deforestation-free supply chain Regulation EUDR in 2027 (for more information see the Policy section of this report). This foreseen stock of beef held by the private sector inflates beef consumption this year and will be consumed in 2027. In 2027, EU beef imports are expected to further decline to 400,000 MT CWE based on the maximum exportable supply from alternative sources (100,000 MT CWE per quarter). The onerous EUDR requirements are anticipated to restrict the EU from importing more volumes of beef from alternative sources next year. Traders have taken this situation already into account by seeking producers in compliance with the EUDR, but overall, the imports from Brazil can only be partially replaced, which will further support higher prices in the EU. The countries most compliant with the EUDR and best positioned to increase their beef exports are the [United Kingdom](#), [Uruguay](#), and to lesser extent [Argentina](#).

As Supply Tightens, EU Beef Consumption Will Inevitably Fall in 2026 and 2027

In 2027, the average slaughter weight is forecast to slightly decline based on higher fodder prices. Overall EU beef production is projected to further fall to 6.3 MMT CWE next year. The tight EU beef balance will be eased by lower exports, but consumption will inevitably further decline next year. The soaring beef prices are pressing down sales with poultry and pork gaining market share. However, trends vary, with some countries even reporting an upward trajectory. In Germany and Austria for instance beef consumption remains strong as mounting inflationary pressures are incentivizing people to cook more at home where ground beef and burgers are a popular and an affordable option. In addition, the broader protein trend is drawing consumers back to red meat as a protein source. While in Spain, the increasing beef consumption in the HRI channel is expected to partially compensate for the decline at the household level resulting in an overall upwards trend. In Romania and Bulgaria beef consumption is supported by an expanding domestic supply, however, consumer demand is still price sensitive.

Quarterly EU27 Beef Imports Metric Tonnes, Carcass Weight

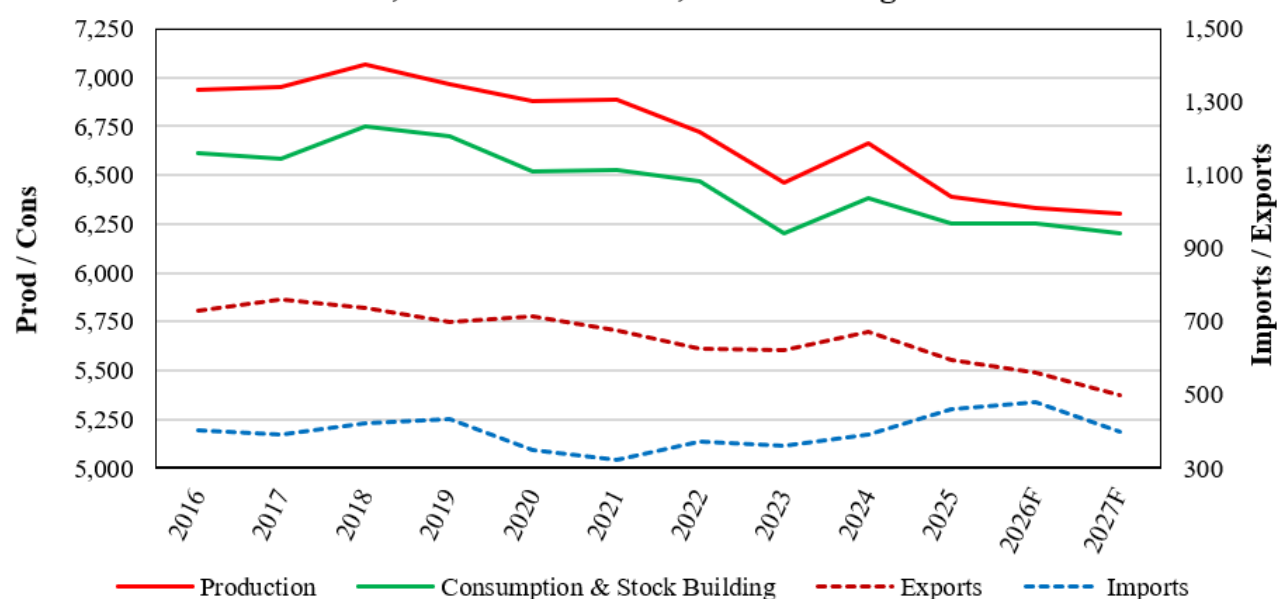


Source: TDM

The Main Producers Increasingly Focus on the EU Domestic Market

Based on the lower availability, EU beef exports are anticipated to fall to 560,000 MT CWE this year. In addition, beef pushed out of the EU market by the VMPP and EUDR is anticipated to compete with EU beef on the global market, mainly in Africa, the Middle East, and Asia. During the first half year, EU shipments fell to the United Kingdom while exports to Türkiye recovered. On the UK market, EU beef experiences strong competition from Brazil, Australia, and New Zealand. Within the Turkish market the EU still covers more than ninety percent of the beef import market, with Ukraine as the main competitor. The main exporting EU Member States (Ireland and Poland) remain active in marketing their beef in third countries. While total Irish exports are on the decline, an increasing share is directed to the EU market (France, Italy, Germany, Spain, and Scandinavia). Also, Polish beef exports fell during the first half of 2026. In 2025, as noted for Irish exports, an increasing share is shipped to the EU market (Germany, Italy, France). In 2026, however, exports to Türkiye recovered from the dip reported last year.

EU27 Beef Balance (F = Post Forecast) 1,000 Metric Tonnes, Carcass Weight



Swine

Animal Numbers, Swine	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	132,136	132,136	127,000	131,450	0	129,800
Sow Beginning Stocks	10,214	10,214	9,950	10,291	0	10,220
Production (Pig Crop)	230,000	235,000	228,000	235,300	0	234,500
Total Imports	10	10	10	10	0	10
Total Supply	362,146	367,146	355,010	366,760	0	364,310
Total Exports	735	729	710	760	0	720
Sow Slaughter	3,870	3,366	3,750	3,400	0	3,390
Other Slaughter	225,130	226,296	221,250	227,100	0	225,910
Total Slaughter	229,000	229,662	225,000	230,500	0	229,300
Loss and Residual	5,411	5,305	5,100	5,700	0	5,290
Ending Inventories	127,000	131,450	124,200	129,800	0	129,000
Total Distribution	362,146	367,146	355,010	366,760	0	364,310

(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 Will Increase Based on Good Farmer Revenues Last Year

The 2025 EU swine balance has been updated based on significant higher Eurostat ending inventories than anticipated in the [Semi-annual](#) report. The higher inventories are balanced by a higher piglet crop. Throughout the EU, swine farmers maximized the use of the sow herd and piglet supply, taking advantage of the relatively low feed prices and high carcass prices (see graph below). As a result of good farmer revenues in 2025, the EU swine sector started with a higher beginning sow stock in 2026. In absolute terms, the sow stock increased most significantly in Spain, Denmark, Germany, Poland, Hungary, and Romania. Based on the expanded breeding herd, the EU is forecast to produce more piglets than last year, despite the finding of African swine fever (ASF) in Spain (for more information see the GAIN report: [African Swine Fever Hits Wild Fauna in Spain](#), published December 17, 2025). This hike in supply caused an increase in official slaughter by 1.44² percent during the first half of this year. While carcass and piglet prices were already declining during the last quarter of 2025 due to a pork oversupply, and Chinese tariffs on Spanish, Dutch and German pork (for more information see the [Semi-annual](#)), prices plummeted after the detection of ASF in Spain. Based on this new reality farmers are anticipated to have limited their uptake of new piglets, which is forecast to level off slaughter during the remainder of the year. Overall, EU slaughter is projected to increase by 0.36 percent to 230.5 million head. Swine inventories are estimated to shrink to 129.8 million head.

The New Reality Will Press Pig Production and Slaughter Next Year

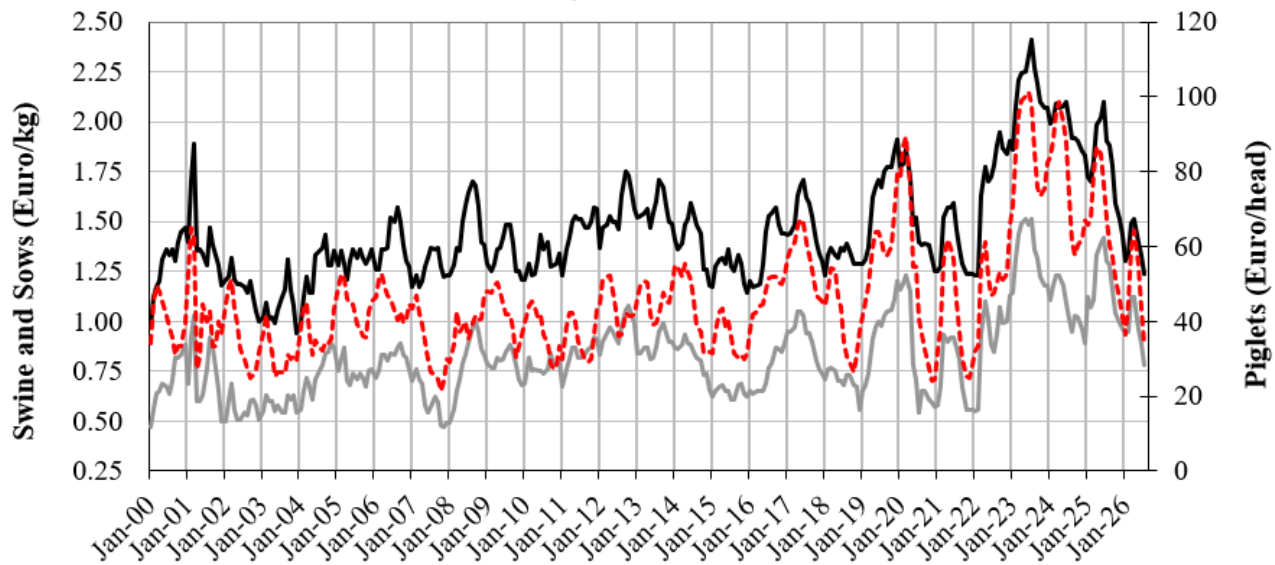
Because the demand for piglets by the Spanish sector plummeted, piglet prices fell significantly in 2026 (see graph). As a result of the suppressed piglet prices, the EU breeding sector is projected to start with a lower sow stock in 2027 and produce less weaned piglets in 2027. In absolute terms, the largest cuts in pig crop are forecast in Germany, the Netherlands, Denmark, and Hungary. The largest cuts in slaughter are forecast in Spain and Germany. With the lower supply of animals, EU slaughter is forecast to fall by 0.52 percent to 229.3 million head, and swine inventories by 0.62 percent to 129 million head, which is a record low. Below is a summary of the situation in the different EU Member States.

ASF Detection in Spain Triggers EU-wide Restructuring, with the Spanish Sector Benefitting

Following the detection of ASF in Spain and the subsequent drop in hog prices, Spanish swine farmers are operating at a loss, leading some to consider exiting the industry. Post anticipates that the closure of less efficient farms will clear the way for more competitive producers, accelerating a structural reorganization of the sector. Because the price slump has spread across the EU, this restructuring will also be manifested at the EU level. However, Spain's highly integrated industry structure, combined with its flexible feed sourcing and export access, means the crisis may ultimately hit other EU Member States harder. Spain currently appears to be absorbing the low prices and is causing competitors such as Germany, France, the Netherlands, and Belgium difficulties in exporting pork to other EU countries.

² The official 2026 half year cattle and swine slaughter figures are based on a Post estimate of the Danish June slaughter figure.

Prices of Swine, Sows and Piglets on farm, the Netherlands



Source: Wageningen Economic Research

Note: Due to the common market, Dutch prices reflect the EU trend.

— Swine — Sow - - - Piglet

Environmental Regulations Restrict the Dutch and Belgian Swine Sectors

The Dutch sector still needs to restructure to reach their nitrogen reduction emission goals (for more information see the previous [Annual](#)). The detection of ASF in Spain reinforced the anticipated restructuring and contraction of the Dutch breeding sector. During the first five months of 2026, Dutch exports of piglets to Spain fell by 43 percent. To reduce national nitrogen emissions the Dutch Government has two funding programs in place to incentivize intensive livestock farmers to sell their farms through buy-out schemes. Similarly, Belgium has made a buy-out program available for the livestock sector. Major drivers for terminating farms are environmental and animal welfare regulatory pressure, particularly the nitrogen policy of the Belgian Flemish region to reduce nitrogen emissions by 2030 as stipulated by EU regulations. Pig farming is also affected by lower profitability and volatile prices, combined with high energy and feed costs. The voluntary farm buy-out scheme is accelerating the decline.

The Danish Sector Is Subject to New Policy Goals

Since 2023, the Danish sector significantly downsized its slaughter capacity. 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. As earlier anticipated, the Danish sector has felt limited pressure from the ASF findings in Spain. Because Spain is ranking only as the eleventh market for Danish piglets, Denmark been able to sustain their piglet exports during the first half of this year. In addition, has the Danish sector been able to benefit from the lost market share of Spanish pork on the global market. During the first half year Danish slaughter increased by 6.4 percent, and pork exports to third countries by 7.6 percent. On June 3, 2026, the new Danish government outlined their coalition agreement which plans a further restructuring of pig production along with stricter animal welfare rules. For the pig sector reform, Denmark seeks to reduce live piglet exports and boost processing to support domestic food supply and employment.

French and German Slaughter Forecast to Decline Following a 2024–2025 Recovery

A significant cut in slaughter is forecast in France. Even though the French sector lacks competitiveness compared to the Spanish, Danish, and Dutch sector, slaughter increased in 2025 for the second successive year. In 2026, however, the worsening market conditions curbed this trend. Like French slaughter, German slaughter recovered in 2024 and 2025 and is projected to decline this year. German pig farmers (particularly sow farmers) face challenges from amendments to the Animal Welfare Livestock Ordinance (for more information see the [Semi-annual](#) report). Without new market incentives, many German farmers are likely to exit production, as current low carcass prices make operations unprofitable. According to major slaughter companies, brutal competitive displacement is currently underway as prices are too low to achieve a profit yet too high to remain competitive on the EU market.

Italian Swine Sector Remains Driven by High-Value Products

Italian producers continue to face pressure from rising input costs, ongoing uncertainty related to ASF, and growing competition from imported pork, which has contributed to lower hog prices and reduced domestic self-sufficiency. At the same time, the sector is showing important signs of resilience. Protected Designation of Origin (PDO) products remain a key strength of the industry, with relatively stable volumes and a strong ability to command value in the market. A growing export value, to both EU and third country export markets, highlights the competitiveness of Italian pork products.

In Central and Southeastern Europe, the Sector Is Commercializing and Integrating Further

Swine slaughter in Central Europe (Poland, Baltics, Czechia, and Slovakia) and Southeastern Europe (Romania, Bulgaria, Greece, Croatia) is forecast to decline slightly, stabilize, or in some cases increase. Although carcass prices fell, abundant local feed (see [Grain and Feed Quarterly](#), published July 30, 2026) and low piglet prices keep efficient producers profitable. Furthermore, EU co-financed farm modernization programs are boosting private investments and industry concentration in these Member States. For instance, the Romanian government designed an investment program to enhance breeding. The Romanian piglet import data published for January-May 2026 shows a decrease of 60 percent. A notable exception is Hungary. Hungary reported an ASF finding in its domestic pig herds for the third time in a row since June 2026. The findings come at a sensitive time for Hungary's livestock industry. Persistently low carcass prices, drought and heat stress, and expected increases in feed costs are all straining the swine sector. These uncertainties are forecast to lead to declines in swine inventories both in 2026 and in 2027

Pork

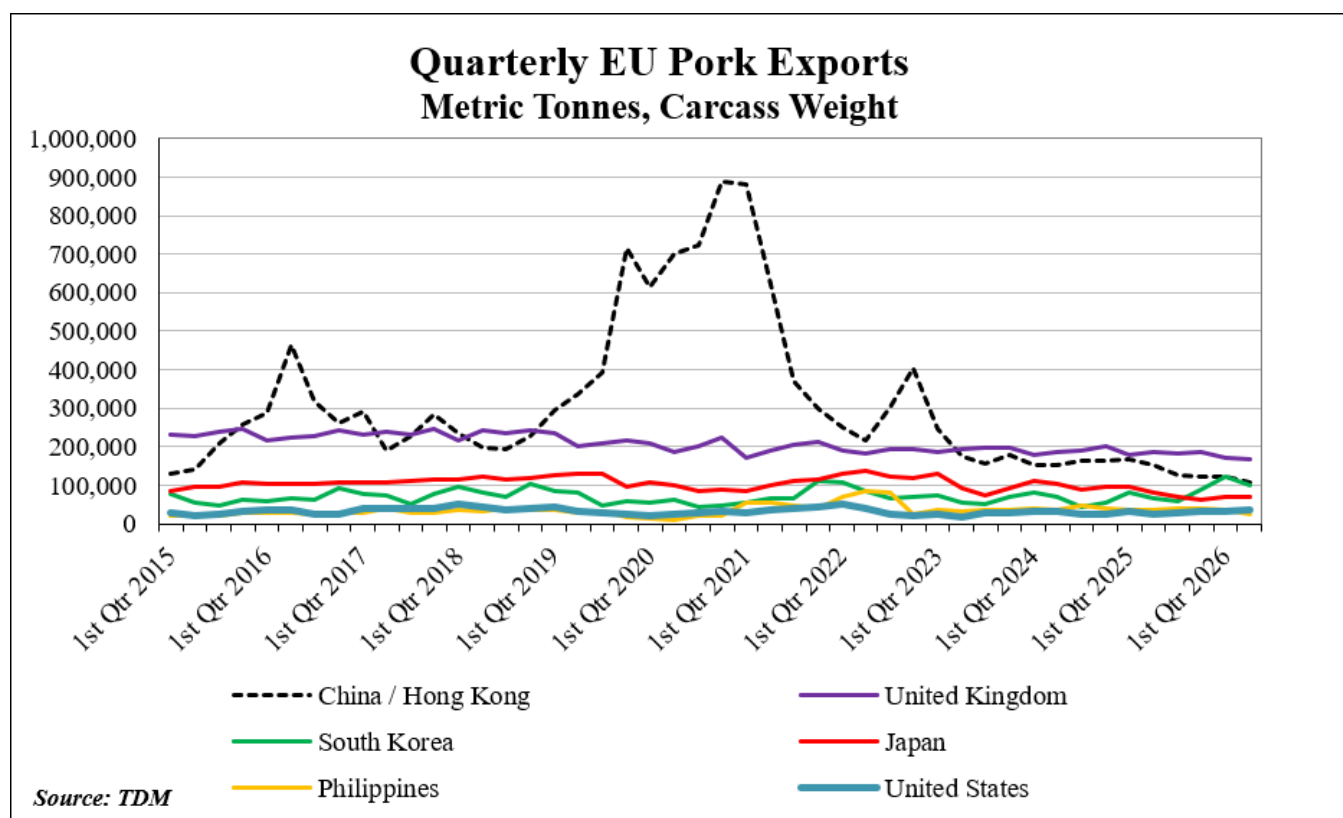
Meat, Swine	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	229,000	229,662	225,000	230,500	0	229,300
Beginning Stocks	0	0	0	0	0	0
Production	21,950	22,014	21,690	22,120	0	22,000
Total Import	97	97	100	115	0	120
Total Supply	22,047	22,111	21,790	22,235	0	22,120

Total Exports	3,030	3,028	2,800	3,050	0	2,950
Human Dom. Consumption	19,017	19,083	18,990	19,185	0	19,170
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	19,017	19,083	18,990	19,185	0	19,170
Ending Stocks	0	0	0	0	0	0
Total Distribution	22,047	22,111	21,790	22,235	0	22,120
(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.

Pork Production Will rise in 2026, Slowing in the Second Half

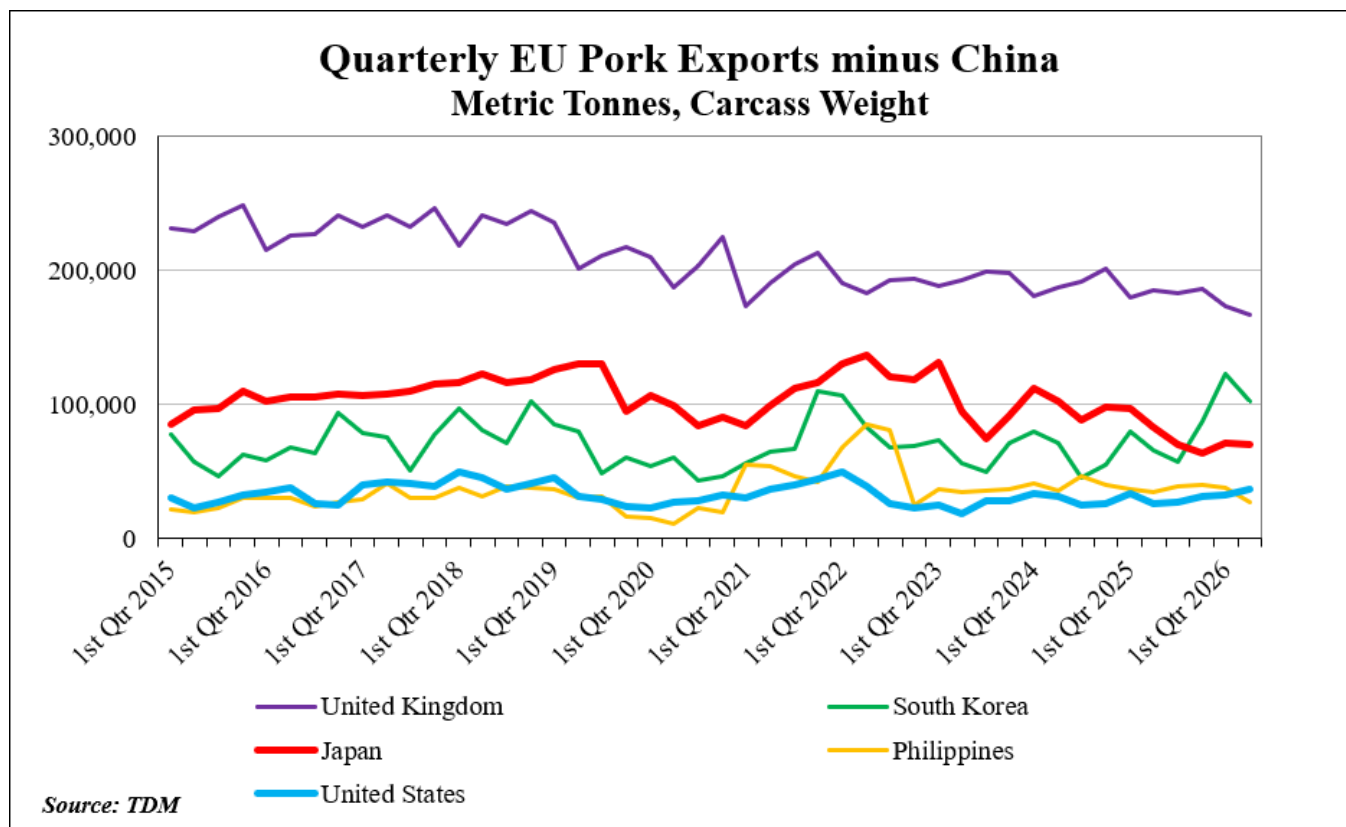
Based on Eurostat annual slaughter statistics, 2025 EU pork production is revised to a slightly higher level and balanced by consumption. During the first half year of 2026, Eurostat official slaughter statistics show an increase in pork production by 1.70 percent. Because of the finding of ASF in Spain in December 2025, the supply of hogs is forecast to level off during the second half to year (see Swine section). In addition, the heat stress and higher feed prices are forecast to pressure slaughter weights. During the first half year, average official slaughter weights increased by 0.26 percent but are forecast to level off to an increase by only 0.12 percent at the end of the year. As a result, EU pork production over the whole year is projected to increase by 0.48 percent to 22.12 MMT CWE in 2026.



Despite a Cut in Spanish Pork Exports, EU Total Exports Are Expanding

With the larger pork supply, EU pork exports rose by 2.1 percent during the first half of 2026. The most significant expansions were reported to South Korea and Vietnam. Because the EU pork supply is

forecast to level off during the remainder of the year, EU pork exports are projected to only marginally increase over the whole year. But these aggregated EU statistics mask the trade dynamics which resulted from the detection of ASF in Spain. After the United States, Spain is the second largest pork exporter in the world (in value to third countries). Spanish pork exports to third countries declined by eleven percent during the first half of 2026. Major reductions were reported for exports to Japan, China, Philippines, Malaysia, and Taiwan. However, not all third country markets cut their imports from Spain. The United Kingdom, South Korea, the Philippines, the United States, and Serbia accepted regionalization, allowing trade from unaffected regions. In absolute terms Spanish exports rose most significantly to South Korea, Vietnam, Chile, the United States, and Singapore. While China's preferential tariff decision and acceptance of regionalization allow Spain to maintain a comparatively competitive position in China.



Other EU Producers Fail to Fill the Gaps Left by Spanish Exporters

Spanish pork exports which were destined for third countries were partly re-directed to EU domestic markets, suppressing domestic carcass prices throughout the EU (for more information see the Swine section). Spanish exports rose to almost all pork deficit EU Member States: Portugal, Italy, Poland, Romania, Czechia, Bulgaria, Hungary, Croatia, and Greece. Even though, the partial exit of Spain in some third country export markets (most prominently Japan, but also to a lesser extent Malaysia and Taiwan among others) left a gap which created opportunities for other prominent EU pork producing countries. During, the first half year of 2026 Danish pork exports to third country markets increased by 7.6 percent, with the most significant increase reported for Japan, Philippines, and Taiwan. But Denmark and other EU suppliers can only partially fill this gap left by Spanish exporters. Specialty products like cured hams will be difficult to replace. In addition, the EU experiences strong competition from the United States and Brazil (see graph below). This effect is most pronounced on the Japanese market

where the United States, Canada, and Brazil significantly increased exports at the expense of Spanish exports without any significant replacement by EU exporters.

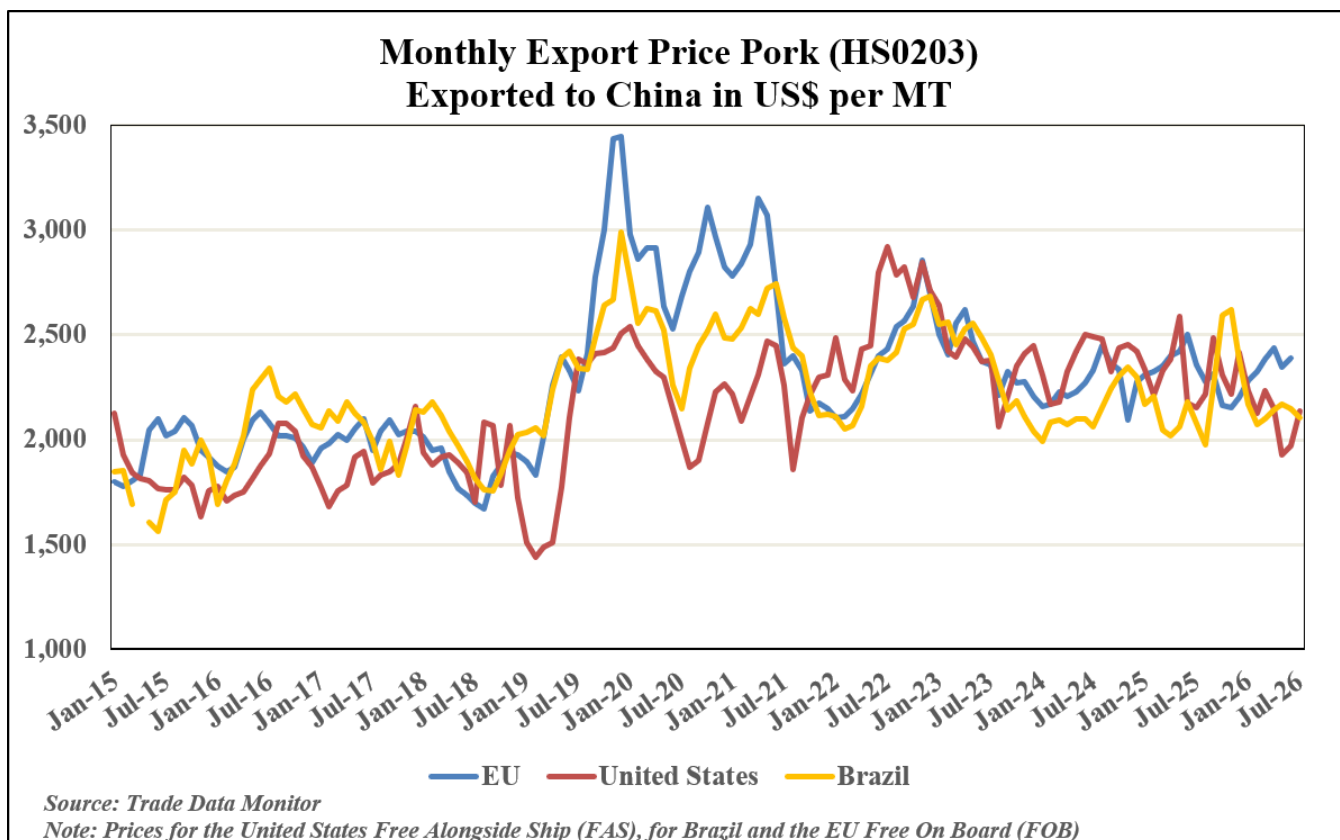
Lower Production and Domestic Focus Drives EU Pork Exports to a Ten-Year Low

In 2027, EU pork production is forecast to decline for the first time since 2023. Major reductions are expected in Spain, France, Germany, the Netherlands, and Hungary. A significant production increase is not anticipated in any of the other EU Member States. Although EU pork production is forecast to fall, EU consumption is expected to remain strong, based on the favorable price of pork compared to beef and chicken breasts. This steady domestic demand for pork supports the EU meat sector's strategic shift toward prioritizing the EU internal market. Exporters now primarily utilize international export channels only for specific cuts, which receive higher prices in foreign markets compared to the EU. This strategic shift was originally triggered by China's sudden reduction in pork imports in 2022, which exposed the EU sector's dependency on a single market. FAS Beijing [reports](#) that China's pork imports have declined for several consecutive years and could reach their lowest level since 2016 in 2026. In 2027, Chinese pork imports are forecast to remain stable as lower domestic production will offset a weakening demand.

Even if Chinese import demand would rebound, the EU pork sector is unlikely to fully benefit, because as explained above, the EU's increasing focus on the EU domestic market. In addition, the EU sector experiences strong competition from Brazil and the United States on the Chinese market, amplified by Chinese tariffs on Spanish, Dutch and German pork. On September 5, 2025, the Chinese ministry placed anti-dumping duties of 15.6 up to 62.4 percent as from September 10 (for more information see the [Semi-annual](#)). At the same time EU exporters have not been able to significantly expand pork shipments to alternative third countries during the past decade (see graph). While Spain had long been the main EU producer pro-actively expanding its global footprint, the detection of ASF curbed initial production and export expectations. While the Danish, Dutch, and Belgian sector are facing radical reforms imposed by their governments (see swine section). In 2027, EU pork exports are projected to be cut by 100,000 MT CWE, to the lowest level since 2015.

Consumption in Central and Southern Europe Is Supported by Falling Prices

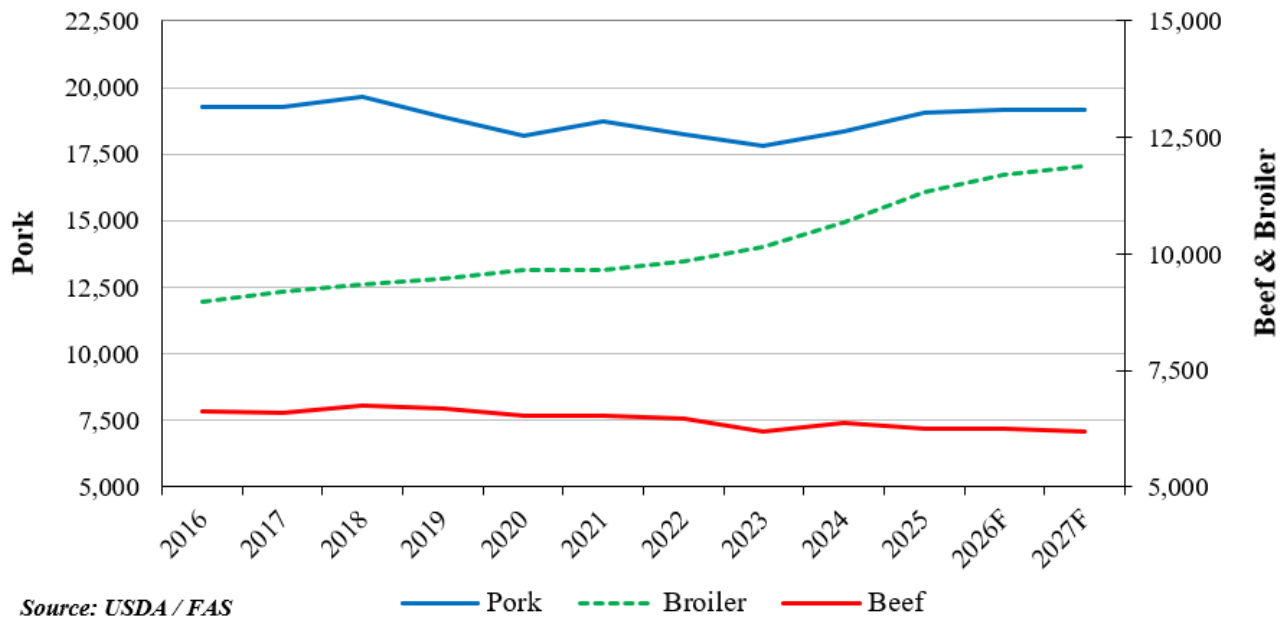
As further expansion of exports is restrained, 19.19 MMT CWE of pork is left for EU domestic consumption this year, the largest volume since 2018. In 2027, the domestic use is forecast to decrease only slightly. The elevated pork supply is expressed by falling prices and supporting consumption in Central and Southern Europe. This trend, consumers turning back to pork, is further amplified by the soaring beef prices and relatively high broiler prices (see [upcoming](#) EU Poultry Annual). In Central Europe and Southern Europe pork is a key part of the cuisine and its consumption is further supported by population growth, increased purchasing power, and the thriving tourism and food service sector. Spanish data indicates that fresh pork meat and processed products' demand remained strong in household consumption while the booming tourism activity also contributes to a steady demand in the HRI channel.



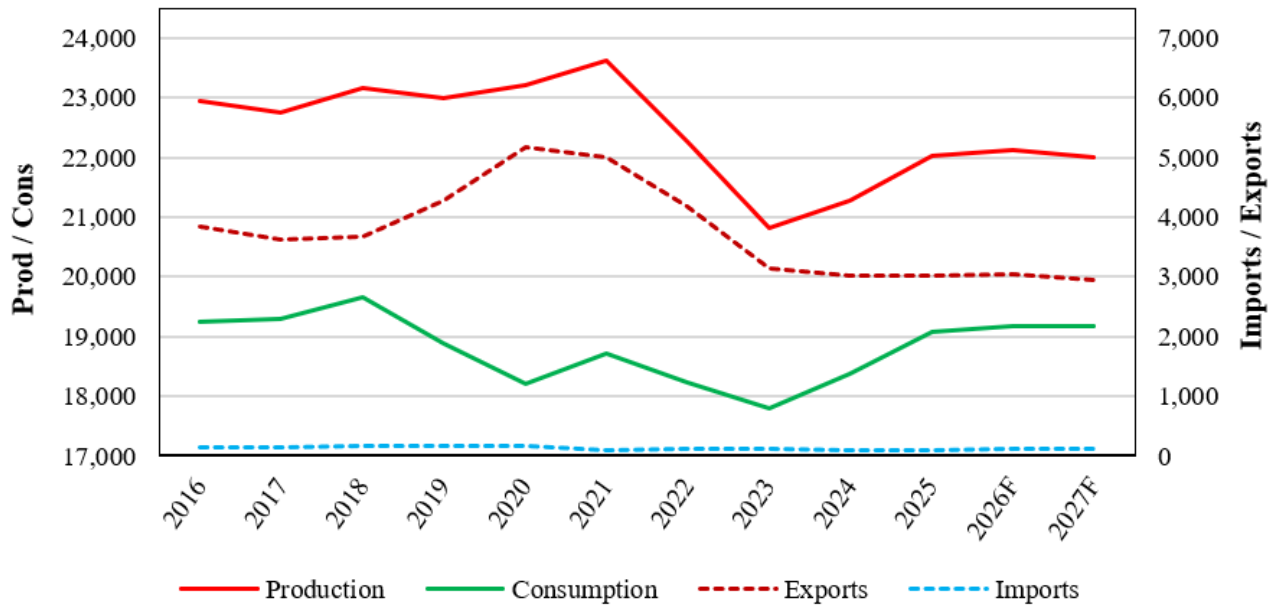
Potential Imports from Mercosur Are Worrying the Sector

In 2026, EU pork imports are forecast to increase to 115,000 MT CWE based on expanding imports from the United Kingdom. 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 PWE). This legislation still needs to be adopted by the European Parliament and the Council of the EU (for more information see the Policy section). Currently, imports from the United States have been limited due to stringent EU veterinary requirements. Also imports from Mercosur are limited but have the potential to become very competitive in the future and are reportedly worrisome for industry actors.

EU27 Meat Consumption (F = Post Forecast) 1,000 MT (Pork&Beef in CWE, Broiler in PW)



EU27 Pork Balance (F = Post Forecast) 1,000 Metric Tonnes, Carcass Weight



Policy Section

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 EU executive. 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 suppliers to reduce strategic dependencies for products like protein-rich animal feed.

Common Agricultural Policy

On May 14, 2025, the EC published a [proposal](#) to simplify the Common Agricultural Policy (CAP). The CAP is the EU's main agricultural support framework, renewed every seven years, providing income support to farmers, funding rural development, and regulating agricultural markets across Member States. The simplification was driven by widespread farmer protests over excessive red tape and administrative burden. The proposed measures target the administrative burden, controls, implementation of the CAP as well as the CAP crisis management tools. The proposal was adopted by the co-legislators in December 2025, published as Regulation (EU)2025/2649, and entered into force on January 1, 2026.

On July 16, 2025, the EC unveiled the plan for the next CAP as part of its 2028–2034 EU budget. The proposal marks a major reform, scrapping 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. The proposal is currently going through the EU legislative process: the European Parliament adopted its negotiating position on the EU budget in April 2026, and negotiations with the Council are ongoing, with a political agreement targeted by the end of 2026. Coupled income support remains a key CAP instrument for the beef and sheep sectors, and its treatment under the next CAP is being closely watched by livestock producers. The proposal also replaces the former agricultural reserve with a strengthened "Unity Safety Net" backed by a €6.3 billion fund for market disturbances and emergencies. More information in GAIN report: [GAIN report: European Commission Unveils CAP Reform with Budget Cut and Structural Change](#).

Industrial Emissions Directive

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

EU Deforestation Regulation

In June 2023, the EC adopted [Regulation 2023/1115](#), also known as the EU Deforestation Regulation (EUDR), aimed to prevent products causing deforestation entering the EU. The proposal targets products identified as main drivers of deforestation, including cattle.³ In December 2025, the EU published [Regulation 2025/2650](#) which delayed the EUDR's entry into application for another year until December 30, 2026. The Regulation also creates new definitions that provide simplifications to some, primarily EU, operators. For more information about the changes introduced by Regulation 2025/2650, please see GAIN Report: [EU Adopts Changes to Deforestation Regulation](#).

On May 4, 2026, the EC published a simplification review report on EUDR, delivering a package of measures aimed at reducing administrative burden while maintaining the regulation's environmental objectives. The package includes an updated guidance document, revised Frequently Asked Questions, and updates to the Information System. The package also includes a delegated act proposing changes to product scope: it removes cattle hides, skins and leather from the scope but adds frozen cattle tongues.

Please note that to allow businesses sufficient time to prepare, the new products added to the scope will become subject to the Regulation from December 30, 2027. Despite U.S. requests, the EC has not addressed key U.S. concerns with EUDR, including a request that producers in countries posing negligible risk not be required to produce due diligence statements or provide onerous geolocation data. For more information, please see GAIN report: [EU Commission Publishes Simplification Review Report on Deforestation Regulation](#).

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 Product Weight (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 32,600 MT PW in calendar year 2025, however, the U.S. exported to the EU only 12,665 MT, which is slight decrease compared to 12,960 MT PW imported in 2024. Using only 39 percent of the quota means that 19,935 MT PW of the U.S. HQB quota went unused. For 2026, the HQB quota increased to 35,000 MT PW.

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

Calendar Year	Amount available	Actual import	Unused quota	Filled quota (%)
2025	32,600	12,665	19,935	39
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

³ EUDR target products include cocoa, coffee, soy, palm oil, wood, rubber, and cattle.

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on livestock. Additional information is available on the website of the EC at:

<https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/>

Mercosur: On December 6, 2024, the EC [announced](#) that the EU and the four Mercosur countries (Brazil, Argentina, Paraguay, and Uruguay) finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. In 2019, the EC 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 tariff rate quotas in the agreement.

The agreement was split into two legal instruments: the EU-Mercosur Partnership Agreement (EMPA), requiring ratification by all EU Member States, and an Interim Trade Agreement (iTA) covering the trade pillar, which falls under exclusive EU competence. The iTA entered into provisional application on May 1, 2026, allowing EU companies to benefit from the agreement ahead of formal conclusion. The European Parliament has referred to the agreement to the European Court of Justice, placing the broader ratification process on hold pending the Court's opinion; formal entry into force still requires Parliament's consent.

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. Additionally, Mercosur countries will be allocated new duty free TRQs for:

- Beef: an additional quota of 99,000 MT at a 7.5 percent in-quota duty, split 55 percent fresh or chilled and 45 percent frozen. The existing 10,000 MT Hilton quota becomes duty-free on entry into force. The additional quota represents around 1.5 percent of total EU beef production.
- Pork: a 25,000 MT quota at a fixed in-quota duty of €83 per MT.

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new FTA expected to enter into force by the end of 2026. The agreement abolishes customs duties for most goods, including agricultural products. For livestock, the concession runs in the EU's favor: the agreement grants a 10,000 MT duty-free TRQ for EU pork loins entering Mexico, and does not open new access for Mexican beef, sheepmeat, or pork entering the EU.

India: On January 27, 2026, the EU and India concluded negotiations on a FTA. Sensitive European agricultural sectors are fully protected, with beef excluded from liberalization. The agreement therefore creates no new EU market access for livestock products.

Australia: On March 24, 2026, the EU and Australia concluded negotiations on a free trade agreement. The agreement establishes new livestock TRQs for Australian product entering the EU, phased in gradually:

- Beef: two quotas totaling 30,600 MT, phased in over 10 years — 16,830 MT duty-free subject to a grass-fed condition, and 13,770 MT at a reduced 7.5 percent duty. This represents around 0.5 percent of EU beef consumption.
- Sheep and goat meat: quotas totaling 25,000 MT duty-free, phased in over seven years, reserved for grass-fed meat, representing around 4 percent of EU consumption of sheep and goat meat.

A stricter bilateral safeguard mechanism applies to products subject to quotas, running for 15 years for beef and 12 years for sheepmeat. Entry into force is anticipated in late 2027.

Thailand: Negotiations toward an EU-Thailand FTA remain ongoing. As of the ninth negotiating round in June 2026, 15 of 24 chapters have been concluded, with agriculture still outstanding. Both sides target conclusion by the end of 2026.

EU Trade Measures in Response to the War in Ukraine

The EU granted Ukraine a temporary liberalization of trade with its Autonomous Trade Measures (ATMs) Regulation, which was in effect from June 4, 2022, until June 5, 2025. This regulation suspended import duties, quotas, and trade defense measures on Ukrainian exports to the EU, providing significant economic support during the Russia-Ukraine war.

Between June 6 and October 29, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA) via [Regulation 1132/2025](#) reintroducing import quotas on Ukrainian agricultural goods. On October 29, 2025, the revised DCFTA entered into force ([Regulation \(EU\) 2025/2199](#)). The revised DCFTA increases market access in both directions compared to the 2014 agreement, but limits EU imports of sensitive agricultural products compared to the levels under the ATMs. It also enshrines a new safeguard clause and provides for the alignment of Ukrainian and EU production standards. Calendar year (CY) 2025 TRQs are applied proportionally from June 6 to December 31, 2025, to the amount of 7/12 of the annual TRQ volumes. For more information, please see [GAIN Report European Union Revises Import Quotas for Agricultural Products from Ukraine](#).

TRQs for Ukraine as of October 29, 2025

Product	Annual Quantity (MT)	Quantity (MT) Jun 6, 2025, to Dec 31, 2025	Period
Beef meat	12,000 MT	7,000 MT	Jan-Dec
Pork meat	20,000 MT expressed in net weight + 20,000 MT expressed in net weight (for the CN codes 0203 11 (10) 0203 12 (19) 0203 19 (11-15-59) 0203 21 (10) 0203 22 (19) 0203 29 (11-15-59))	11,666 MT expressed in net weight + 11,666 MT expressed in net weight (for the CN codes 0203 11 (10) 0203 12 (19) 0203 19 (11-15-59) 0203 21 (10) 0203 22 (19) 0203 29 (11-15-59))	Jan-Dec
Sheep meat	2,250 MT	1,312 MT	Jan-Dec

EU Tariff Reductions Under EU-US Trade Deal

On June 30, 2026, the EU published [Regulation \(EU\) 2026/1455](#) on the adjustment of customs duties on the import of certain goods originating in the United States in the Official Journal. This Regulation entered into force on July 1, 2026. The Regulation will cease to apply on December 31, 2029, but the text foresees an extension of the period of application following a comprehensive assessment of the effects of this Regulation that the EC shall publish by June 30, 2029.

Regulation 2026/1455 implements the U.S.-EU Framework Agreement of Reciprocal, Fair, and Balanced Trade by eliminating tariffs on most U.S. industrial goods and on a basket of agricultural goods. In addition, this regulation creates 20 new tariff rate quotas (TRQs) for agricultural products, including:

- 25,000 MT for pigmeat at 0 percent duty
- 3,000 MT for bison meat at 0 percent duty

For more information, please see [GAIN report: Tariff Implementation of US-EU Agreement](#)

New EU Animal Welfare Legislation

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 \(horizontal\)](#) and [Directive 2008/119/EC on calves](#)

The EC aims to present a legislative proposal for the first sectors by Q4 2026, building on the [call for evidence](#) and [public consultation](#) contributions collected 2025.

The 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 stricter requirements for transporters, including training and certification for animals imported from third countries into the EU. The main impact is likely to be increased compliance costs and more frequent or intensive border checks, rather than a complete loss of access. The European Parliament is expected to vote on the file, including amendments ([2023/0448\(COD\)](#)) in 2026, 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 (VMPR)

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 VMPP 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 Union 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 started to apply from September 3, 2026.

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 more information [see this factsheet](#).

Since the beginning of the year 2026, there were several outbreaks across Europe:

- ASF in domestic pigs: Croatia (99), Hungary (1), Italy (3), Latvia (9), Poland (2), Romania (139), Slovakia (3), Bosnia and Herzegovina (8), Moldova (14), Serbia (175), Ukraine (5).
- ASF in wild boar: Bulgaria (278), Germany (651), Spain (52), Estonia (71), Greece (1), Croatia (94), Hungary (537), Italy (916), Lithuania (841), Latvia (461), Poland (1488), Romania (286), Slovakia (122), Bosnia and Herzegovina (7), Moldova (23), Serbia (65), Ukraine (7).

More information about the ASF situation in the EU is available online at: [African Swine Fever – EC](#)

Foot and Mouth (FMD) Disease Outbreaks

Following three FMD outbreaks reported in 2025, Greece and Cyprus notified the EC in 2026 of confirmed outbreaks of FMD within their territories. The circulating strain, SAT1, is genetically unrelated to the strains responsible for the 2025 outbreaks in Hungary, Slovakia, and Germany.

- Cyprus (February – June 2026): 121
- Greece (March – July 2026): 154

The EC adopted several Commission Implementing Decisions concerning interim emergency measures. The Commission Decision identifies at Union level the areas to be included in the restricted zones and provides additional measures, including restrictions on movements of susceptible animals from the

further restricted zone. To support containment efforts, the EC has delivered 1,029,000 doses of FMD vaccine to Cyprus.

More information about the current FMD situation in the EU is available online at EU FMD website: [Foot-and-mouth disease - Food Safety - European Commission](#)

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:

Xavier Audran from FAS Paris covering France
Tania de Belder from FAS Brussels covering Belgium and Luxembourg
Ornella Bettini from FAS Rome covering Italy
Sophie Bolla from the U.S. Mission to the EU covering EU policies
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
Anna Galica from FAS Warsaw covering Poland, Estonia, Latvia, and Lithuania
Gellert Golya from FAS Budapest covering Hungary and Slovenia
Marta Guerrero from FAS Madrid covering Spain and Portugal
Steve Knight from FAS London covering Ireland
Andreja Misir from FAS Zagreb covering Croatia
Antonia Rudolf from FAS Berlin covering Germany and Austria
Kristýna Spáčilová from the U.S. Mission to the EU covering EU policies

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	Dairy and Products Semi-annual	06/05/26
EU	Call for Evidence - EU Strategy for Livestock	03/25/26
Ukraine	Livestock and Products Semi-annual	03/19/26
EU	Livestock and Products Semi-annual	03/13/26
EU	EU Adopts Changes to Deforestation Regulation	01/05/26
Ireland	Ireland's Nitrate Derogation Extended Another Three Years	12/31/25
Spain	African Swine Fever Hits Wild Fauna in Spain	12/17/25
EU	Dairy and Products Annual	12/09/25
Lithuania	Bluetongue Disease Reaches Lithuania	11/24/25
EU	European Union Opened Public Consultation on the Revision of EU Legislation for On-Farm Animal Welfare	11/24/25
EU	Livestock and Products Annual	09/16/25
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	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
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

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