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Report Highlights:

Driven by strong internal demand, EU chicken meat production is expected to continue growing in 2025 and 2026. In 2025, Poland will remain the largest EU chicken meat producer, accounting for more than 21 percent of total EU production. The EU trade surplus in chicken meat is expected to decrease in 2025 and 2026 with higher imports while exports will be constrained by HPAI related bans and less competitive EU chicken meat.

DISCLAIMER

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Executive Summary

Driven by strong internal demand, EU chicken meat production is expected to grow in 2025 and 2026.

In 2025, Poland will remain the largest EU chicken meat producer, accounting for more than 21 percent of all EU production. After years of growth fueled by both domestic and export demand, Polish chicken production is anticipated to decline by 3.8 percent in 2025 due to HPAI outbreaks in hatcheries in the first months of 2025 that limited chick supply and Newcastle Disease (ND) outbreaks affecting major broiler producing regions of the country. The decline in Polish production in 2025 will be more than offset by gains in France and Spain, as well as Germany, Czech Republic and Hungary, allowing total EU production to grow marginally. However, it is anticipated that Polish growth will resume in 2026. The EU chicken industry generally operates on a short two to three-month production cycle which is very reactive to market conditions and external events. USDA forecasts are therefore based on information that is available at the time of publication.

EU chicken meat trade surplus is expected to decrease in 2025 and 2026 as imports are growing, and exports are declining slightly.

The UK is the second largest supplier of poultry meat to the EU. UK and EU poultry traders are adapting to post-Brexit conditions, complying with EU veterinary rules and other requirements. The UK maintains a competitive advantage in shipping fresh/chilled chicken meat to the EU, while importing less expensive frozen Ukrainian chicken meat at zero duty. In 2025, EU imports of Brazilian chicken meat will benefit from the lifting of EU sanitary restrictions and the HRI demand for competitively priced chicken cuts. EU imports of chicken meat from China are also expected jump significantly in 2025. Chinese chicken producers located in Shandong province benefit from the tariff rate quotas on heat-treated chicken meat that were negotiated in 2019.

While EU chicken meat imports from Ukraine have doubled since 2022, Ukrainian exporters now face increasing constraints with EU regulations and export licenses.

EU chicken meat exports are anticipated to decline in 2025 and 2026.

The UK remains the largest customer for EU chicken meat. Exports of low-priced frozen cuts (mostly dark meat) and mechanically deboned chicken meat to sub-Saharan Africa are expected to decrease. The hike in EU chicken prices combined with a rise in the value of the Euro (EUR) versus other currencies, including the U.S. Dollar (USD) is negatively impacting the competitiveness of EU chicken meat. While several trade bans related to Highly Pathogenic Avian Influenza (HPAI) have been lifted, others are expected to continue to constrain EU chicken meat exports.

Despite food inflation and higher energy costs, EU chicken meat consumption is expected to remain strong in 2025 and 2026.

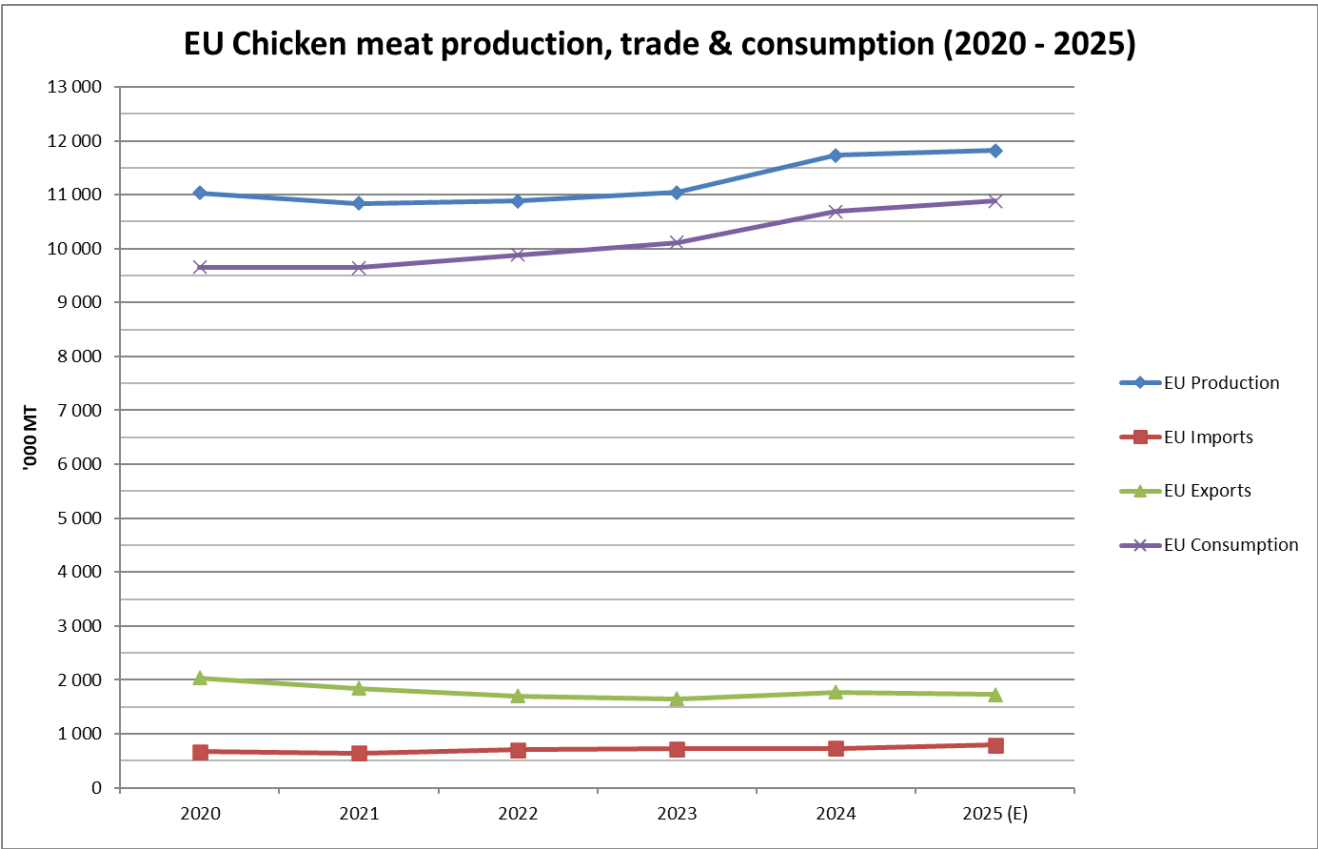
Convenient to use and less expensive relative to other animal protein, chicken meat is a popular animal protein. EU chicken consumption is increasing in line with demographic growth. Consumption is also slowly increasing on a per capita consumption basis. While premium production schemes like organic, free range, and GMO-free fed chicken have gained a lot of support throughout the EU, consumption of less expensive chicken meat cuts is growing at a much faster rate compared to more premium products like breasts and whole birds.

Production, Supply and Distribution:

Chicken Meat PS&D Table

Meat, Chicken Market Year Begins European Union	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	11490	11729	11750	11820	0	11970
Total Imports (1000 MT)	730	729	720	790	0	800
Total Supply (1000 MT)	12220	12458	12470	12610	0	12770
Total Exports (1000 MT)	1771	1772	1800	1730	0	1720
Human Consumption (1000 MT)	10449	10686	10670	10880	0	11050
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	10449	10686	10670	10880	0	11050
Total Use (1000 MT)	12220	12458	12470	12610	0	12770
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	12220	12458	12470	12610	0	12770
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Figure 1



Source FAS Posts

Production

Estimates for EU production in 2024 have been revised due to newly available production data from Belgium, France, Germany, Italy, Spain and Poland. **EU chicken meat production is expected to increase by 0.8 percent in 2025.** This increase is driven by sustained domestic demand, even if exports are declining. While economic conditions throughout Europe have improved since the COVID-19 crisis, market conditions continue to favor less expensive animal protein. **Production growth is expected to continue in 2026.**

An estimated 98 percent of all EU chicken production consists of broiler meat. The remaining 2 percent is primarily meat produced from laying hens and roosters. According to data from the European Food Safety Authority (EFSA), as of June 2025, Europe had [the lowest number](#) of recorded HPAI cases in poultry and wild birds since 2019/2020. The impact on the EU chicken meat sector is generally limited, but in some countries, such as Poland, outbreaks in reproduction and hatching farms led to a shortage of chicks, impacting production growth in 2025.

Driven by consumer demand, the expansion of free-range / organic chicken production in several EU Member States is a growing concern for EU veterinary authorities. The smaller and more specialized production systems are believed to be more vulnerable to HPAI outbreaks. Chickens roaming outside are more likely to encounter wild birds that carry the HPAI virus.

Poland is the largest chicken producer in the EU, accounting for more than 21 percent of all EU chicken production. Close to 70 percent of Poland's production is exported to EU (44 percent of the production) or to extra-EU countries (26 percent of the production). FAS Warsaw estimates that, due to HPAI outbreaks in hatcheries in the first months of 2025 and continuing Newcastle disease (ND) outbreaks in major broiler producing regions, Polish chicken production will decline by 3.8 percent in 2025, but growth will resume in 2026. After struggling with high energy and feed costs in 2022, the economic situation of the Polish poultry sector improved significantly as feed costs declined and wholesale / retail prices increased. As there continues to be a shortage of non-GMO feed, the idea of reducing or eliminating GE soybean meals from feed rations is unrealistic. The Polish government extended the suspension of the GE feed ban to January 1, 2030.

In addition to reporting 85 HPAI outbreaks in poultry farms, most of them in turkeys' and laying hens' farms, Poland also experienced several ND outbreaks, with 33 cases reported in broiler farms in the first semester of 2025. In response to increasing ND threat, the Polish government introduced additional disease control measures. The new provisions on biosecurity and guidance for stocking henhouses in ND infected areas entered into force in April 2025, while the provisions on the obligatory ND vaccination of chicks and turkeys entered into force in May 2025.

Poultry production in **Spain**, the second largest EU chicken meat producer, in 2025 is expected to expand driven by positive production margins, the absence of HPAI outbreaks in commercial animals prior to July 2025, steady domestic demand, together with the price competitiveness compared to other EU Member States and third country markets. Further growth is foreseen for 2026. The Spanish poultry sector is highly concentrated in a handful of companies. Poultry farms and meat processing facilities are facing a consolidation process horizontally, with large groups such as [Vall Companys](#) increasing their market share. Beyond internal consolidation, the positive economic results of the poultry sector have sparked the interest of international investors, such as the Ukrainian group [MHP](#), which since Spring 2025 now owns a majority share capital of [Uvesa](#), or the Dutch group [Plukon](#), which continues to expand its presence by facility acquisitions in central Spain.

In **France**, chicken meat production is slowly increasing driven by domestic demand. While French extra-EU exports have stagnated (mainly due to higher costs), the French domestic retail market for chicken meat remains

buoyant. French households generally prefer to purchase chicken products that have been produced in France. The HRI sector is a notable exception, where most chicken meat is imported.

Like beef and pork production, chicken meat production in **Germany** is expected to grow only marginally in 2025 and 2026. Stricter regulations on animal husbandry under the Animal Welfare Initiative are lowering population densities on German farms. Today, it is almost impossible to obtain permits for new sheds, which is a significant factor limiting growth in production.

In **Italy**, chicken meat production is expected to grow in 2025 and 2026 and will likely reach record levels not achieved since before the HPAI outbreaks in 2020.

After a continuous reduction of chicken production in **Netherlands** since 2018, production is foreseen to slightly increase in 2025 and 2026, benefiting from lower competition from Polish production and lower imports from Ukraine. From 2018 to 2024, Dutch chicken production declined due to the larger share of “slow growth” birds. About 40 to 50 percent of Dutch production is now dedicated to this form of higher-end production. The Dutch retail market is almost exclusively dedicated to fresh chicken products under the scheme “Better Life”. This animal welfare label was first introduced in 2007. The “Better Life” label is owned by the Dutch Society for the Protection of Animals (SPA). SPA cooperates with producers and retailers throughout the supply chain. Currently, the “Better Life” label is one of the most successful sustainability labels in Europe. It is ten times larger than the organic label used by the meat sector and has quickly become a standard for the sale of chicken meat in supermarkets.

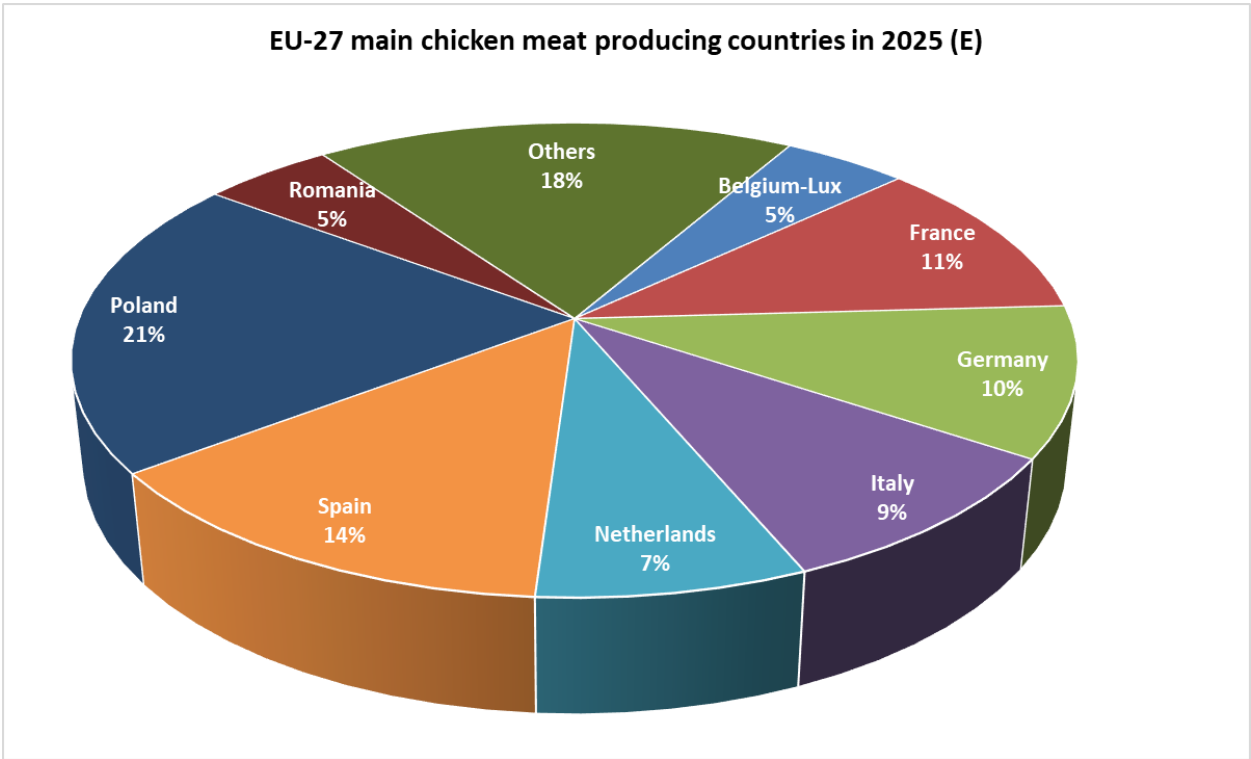
In **Romania**, the chicken industry is expected to stay flat in 2025 and rise moderately in 2026 (+1.2 percent) due to sluggish internal demand driven by the rising cost of living.

Chicken meat production is slowly growing in **Belgium** despite a 10 percent decline in the number of poultry farms. This trend underscores the growing concentration of production in the Flanders region.

Although HPAI outbreaks negatively affected **Hungary**’s poultry industry, the impact on chicken operations was contained thanks to immediate quarantine measures and the mandatory closed-house systems in place. Chicken production is anticipated to slowly grow in 2025 and 2026 due to predictable domestic demand and increasing investment. At the same time, an estimated 15 percent of Hungarian poultry producers gave up their business since 2023, leading to an inevitable consolidation of production.

The Ukrainian company MHP announced in April 2025 that it will shelve its plans to build three chicken farms (producing 6 million chicken birds annually) in **Croatia** by 2027. MHP also owns the local company Perutnina Ptuj (purchased in 2018) and recently announced that it wants to increase revenues to one billion euros by 2027. They now plan to grow their business organically and not through external purchases. Another Ukrainian company, Petrinja Chicken Company (PCC), also announced a EUR500 million (USD580 million) investment in Croatia for the production of 150,000 MT of chicken meat annually by 2026. Farms would be fully vertically integrated and export 30 percent of production. Of exports, 90 percent would be destined for other EU member states with the remainder to Asia.

Figure 2



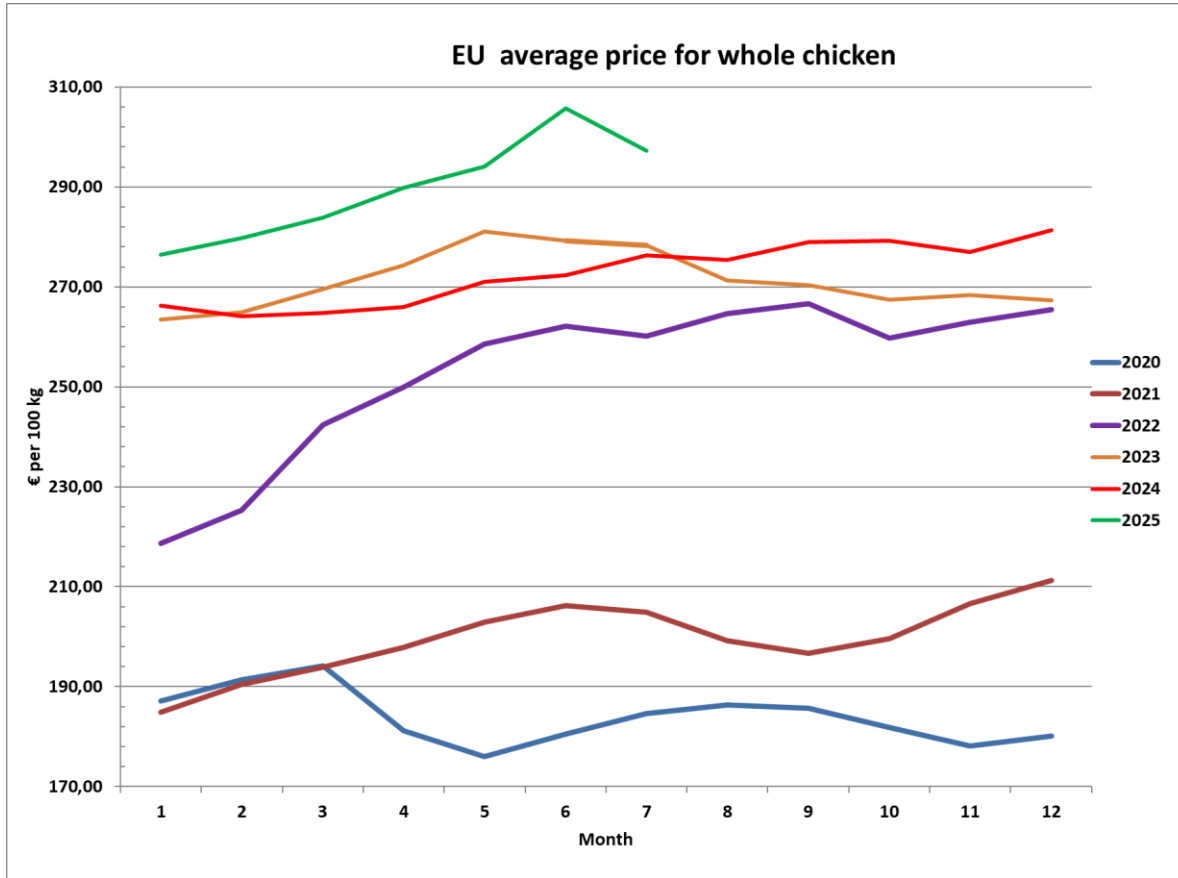
(Source FAS Posts)

Price

Historically high EU chicken prices

After historically high prices in 2021 and 2022, the average price of EU chicken meat stabilized in 2023, benefiting from lower feed costs. It rose in 2024 fueled by the strong internal demand, and initial data for the first six months of 2025 show further increase, well above the 2022 levels, indicating that prices are again rising, also driven by the demand.

Figure 3

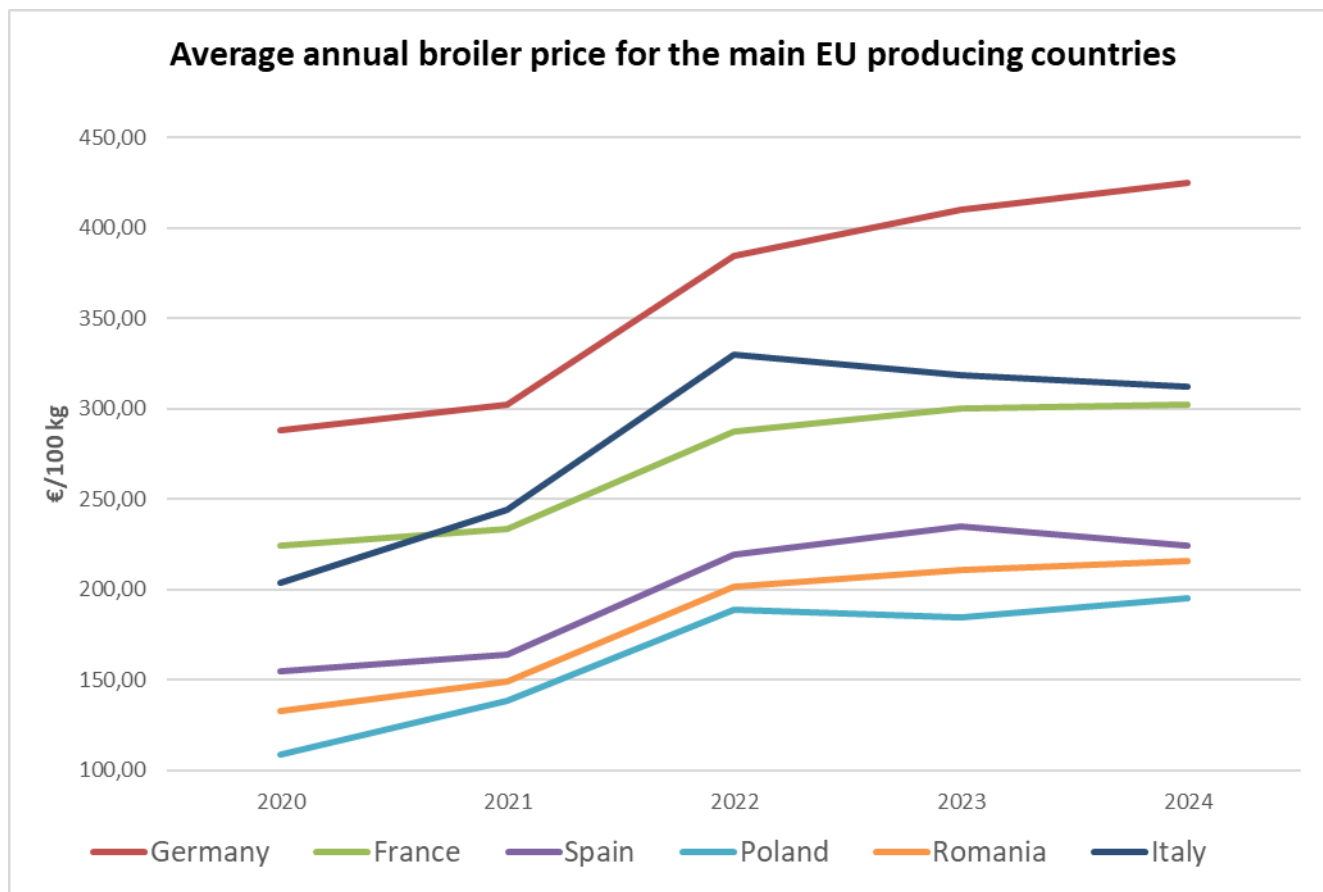


(Source: European Commission, data for broilers only)

But significant price differentials within the EU

Within the EU there are significant price differences between Member States. This is particularly true for broiler meat. On average, chicken prices in Germany are 2 EUR per kilo (USD1.06 per lb) higher than in Poland. The average price differential with France is 1 EUR per kilo (USD 0.53 per lb). This is why Polish chicken meat shipments to other EU Member States have increased significantly in recent years, to the point of even displacing inexpensive imported Brazilian chicken meat.

Figure 4



(Source: European Commission, data for broilers only)

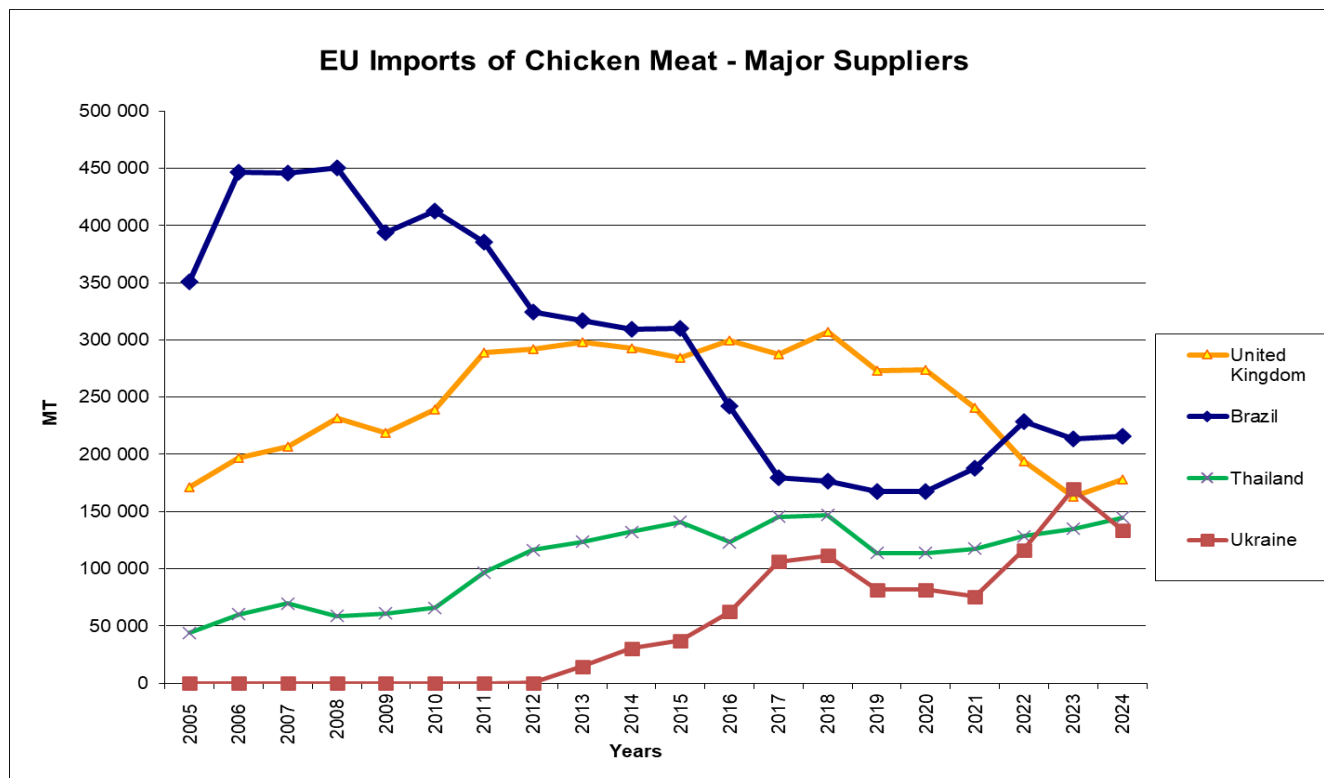
Trade

The EU chicken meat trade surplus is expected to decrease in 2025 as EU imports will significantly increase (plus 8.4 percent). Exports are expected to shrink by 2.4 percent. The UK is the EU's **second largest supplier and leading customer** of chicken meat. **However, the balance of trade favors the EU. The EU exports almost 4 times more volume to the UK than it imports.**

EU imports

EU imports of chicken meat are regulated by [Regulation \(EU\) 2020/760](#) that sets [tariff rate quotas](#) (TRQ) for specific HS code category. Products imported above the existing quotas are subject to the [EU ad valorem tariff](#). For more information about applicable tariffs, check <https://trade.ec.europa.eu/access-to-markets/en/home>

Figure 5



(Source Trade Data Monitor)

In CY 2025, **Brazil is expected to keep its status as the largest supplier of chicken meat to the EU**, ahead of the UK. Since Brexit, the UK is considered to be an extra-EU trading partner, and therefore non-EU trade arrangements apply. This includes [prohibiting](#) imports of chilled and frozen minced poultry meat as well as mechanically separated poultry meat. Imports of chicken meat from the UK declined sharply since 2021 as UK exporters face increasing border controls and inspections.

Following a system audit led by the EU's DG Sante in October and November 2023, the EU has acknowledged that Brazil has improved controls on poultry meat sent to Europe. The audit noted that Brazil largely addressed the recommendations of previous audits in 2017 and 2018. On September 4, 2025, Brazil [announced](#) that, after it regained the HPAI free status it had lost in May 2025, the EU will gradually and fully open its market to Brazilian poultry.

In 2021, Brazil requested [WTO consultations](#) with the European Union with respect to measures on importation of certain poultry meat preparations from Brazil, in particular salted poultry meat and turkey meat with pepper. The request concerned the EU's food safety criteria for salmonella on fresh poultry meat and certain poultry meat preparations. At that time, Brazil noted that there is no technical or scientific justification for the application of stricter microbiological criteria, and therefore Brazil views this measure as discriminatory and as a violation of the rules of the Agreement on Sanitary and Phytosanitary Measures of the WTO. Since then, the case has not moved forward.

The completion of the [EU-MERCOSUR Free Trade Agreement](#) discussions announced in early September 2025 could eventually facilitate Brazilian exports of poultry meat to the EU following a final ratification of this

Agreement¹. Several EU Member States have been very vocal in expressing their concerns regarding agricultural commodities, notably France. Under the agreement, there would be a gradual phase out of 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 TRQs with a 5-year phase in period:

- 90,000 metric tons (carcass weight equivalent) for boneless poultry meat
- 90,000 metric tons (carcass weight equivalent) for bone-in poultry meat

Ukraine is the third largest supplier of chicken meat to the EU. The Russia-Ukraine war, which began in 2022, ushered significant changes to the [2014 Deep and Comprehensive Free Trade Agreement \(DCFTA\)](#) between the EU and Ukraine. The EU-Ukraine DCFTA set Tariff Rate Quotas (TRQs) for chicken parts and whole birds. On May 30, 2022, the EU enacted [EU regulation 2022/870](#) that established an Autonomous Trade Measure (ATM) to support the Ukrainian economy. The 2022 ATM established temporary free-trade measures to supplement the trade concessions of the DCTA. Ukrainian chicken meat was made immediately eligible to enter the EU without tariffs or quotas. With this measure in place, EU chicken meat imports from Ukraine almost doubled in 2022 and further increased in 2023.

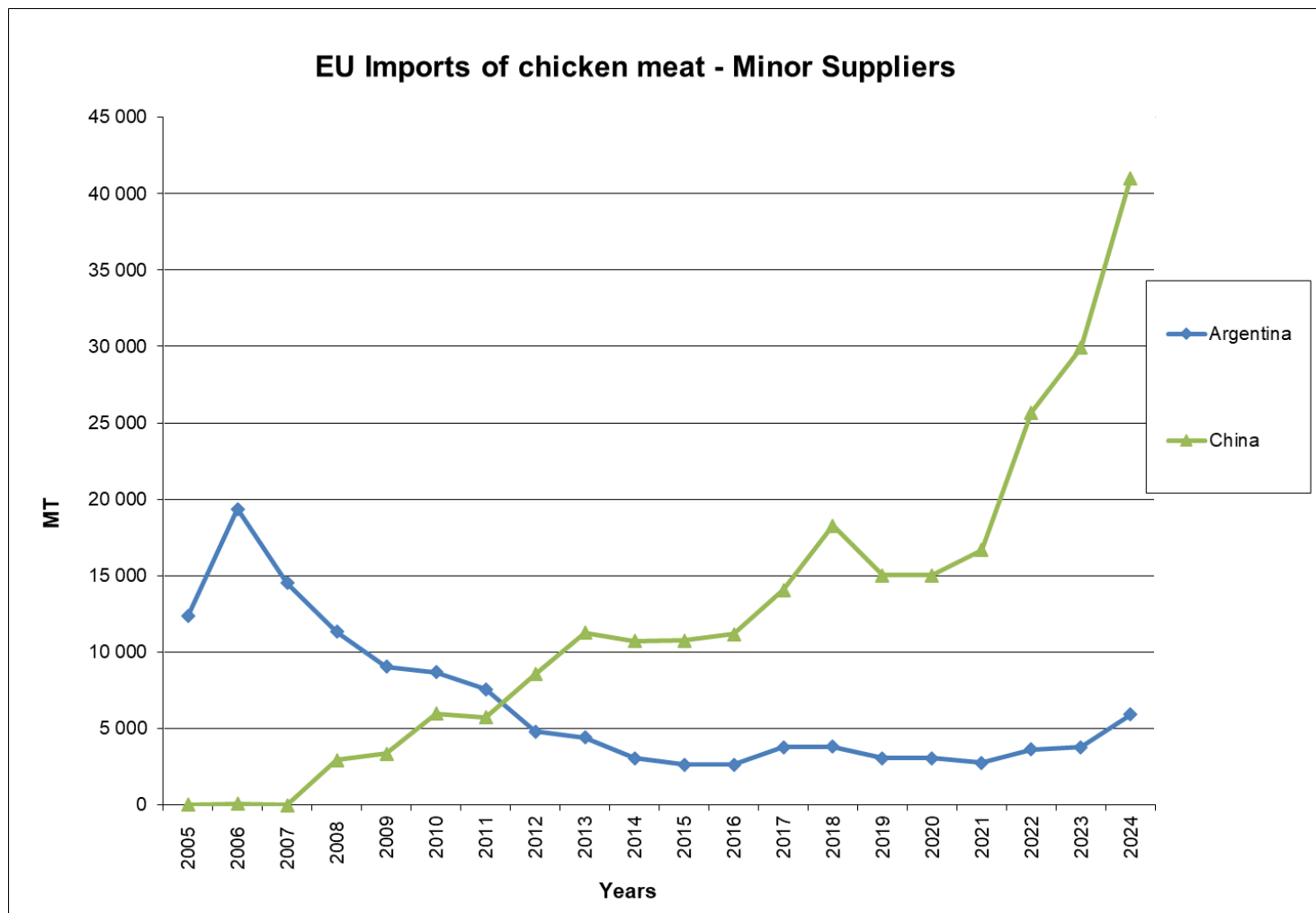
As of June 6, 2025, the EU-Ukraine trade relationship reverted to the 2014 [Deep and Comprehensive Free Trade Area \(DCFTA\)](#). The European Commission published [Regulation 1132/2025](#) which prorates the quotas for the seven months remaining of 2025. Once thresholds are met, standard tariffs apply. On June 30, 2025, the European Commission announced that it 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 still needs to be approved by the EU Member States, but it is expected to be finalized before the end of 2025.

Consequently, **EU imports of Ukrainian chicken meat are expected to decline in 2025 and 2026** compared to previous years.

A significant share of the Ukrainian chicken meat exports to the EU goes to Slovakia, where it is processed by a local Company named [EU Poultry](#) which has a partnership with the Ukrainian company MHP. The proximity of the Slovakian facility to the Ukrainian border has facilitated shipments of chilled chicken meat from the Ukrainian slaughterhouses. The final product can then be sold as an EU processed product, essentially bypassing the need to declare Ukrainian origin to the final consumer.

¹ As the agreement is not yet ratified by all parties nor has an implementation date, the EU-MERCOSUR Free Trade Agreement is not considered in the forecast.

Figure 6



(Source Trade Data Monitor)

Argentinian chicken meat exports to the EU have significantly decreased due to rising competition with Brazil but benefited in 2025 from a currency advantage to slightly regain some market shares. On the other hand, **Chinese chicken meat exports to the EU have increased significantly** since 2021, and in 2025, China is no longer a minor supplier. Chinese chicken producers located in Shandong province benefit from the tariff rate quotas on heat-treated chicken meat that were negotiated in 2019.

The United States is not a supplier to the EU as the EU does not accept Pathogen Reduction Treatments (PRTs) that are commonly used by U.S. poultry processors.

EU Exports

After a 7 percent increase in 2024, **EU chicken meat exports are expected to decline by 2.4 percent in 2025**, driven by lower expected exports to United Kingdom, Saudi Arabia, Vietnam, Philippines, Ukraine, Guinea and Cuba more than offset higher expected volumes to Ghana, Democratic Republic of Congo, Mozambique and Benin. Several countries, like the Philippines, that have historically imported EU chicken meat, have now removed their HPAI restrictions on EU poultry meat. The hike in EU chicken prices combined with a rise in the

EUR value versus other currencies, including the USD, is partly responsible for the decline in exports as EU chicken exports are less competitive in most export markets.

HPAI Affecting EU exports of chicken meat

List of countries temporarily banning EU poultry and egg products from HPAI affected Member States	List of countries restricting EU poultry products based on EU regionalization protocols
China	Armenia
South Africa	Belarus
South Korea	Cuba
	Egypt
	Hong Kong
	Japan
	Kazakhstan
	Mexico
	Russia
	Saudi Arabia
	Taiwan
	Ukraine
	United Arab Emirates

Thailand, and Japan have all banned imports of poultry meat and products from EU countries that have introduced HPAI vaccination programs. The United States restricts the importation of live poultry and unprocessed poultry products from regions that vaccinate against HPAI. If requested by the country, USDA Animal and Plant Health Inspection Service (APHIS) will evaluate the HPAI vaccination program to determine what, if any, modifications to those restrictions are warranted. APHIS evaluated France’s HPAI duck vaccination program and then lifted restrictions on live poultry from unvaccinated flocks and unprocessed poultry products from species other than ducks.

More updated information on HPAI trade restrictions can be found on the EU Commission [trade barrier website](#).

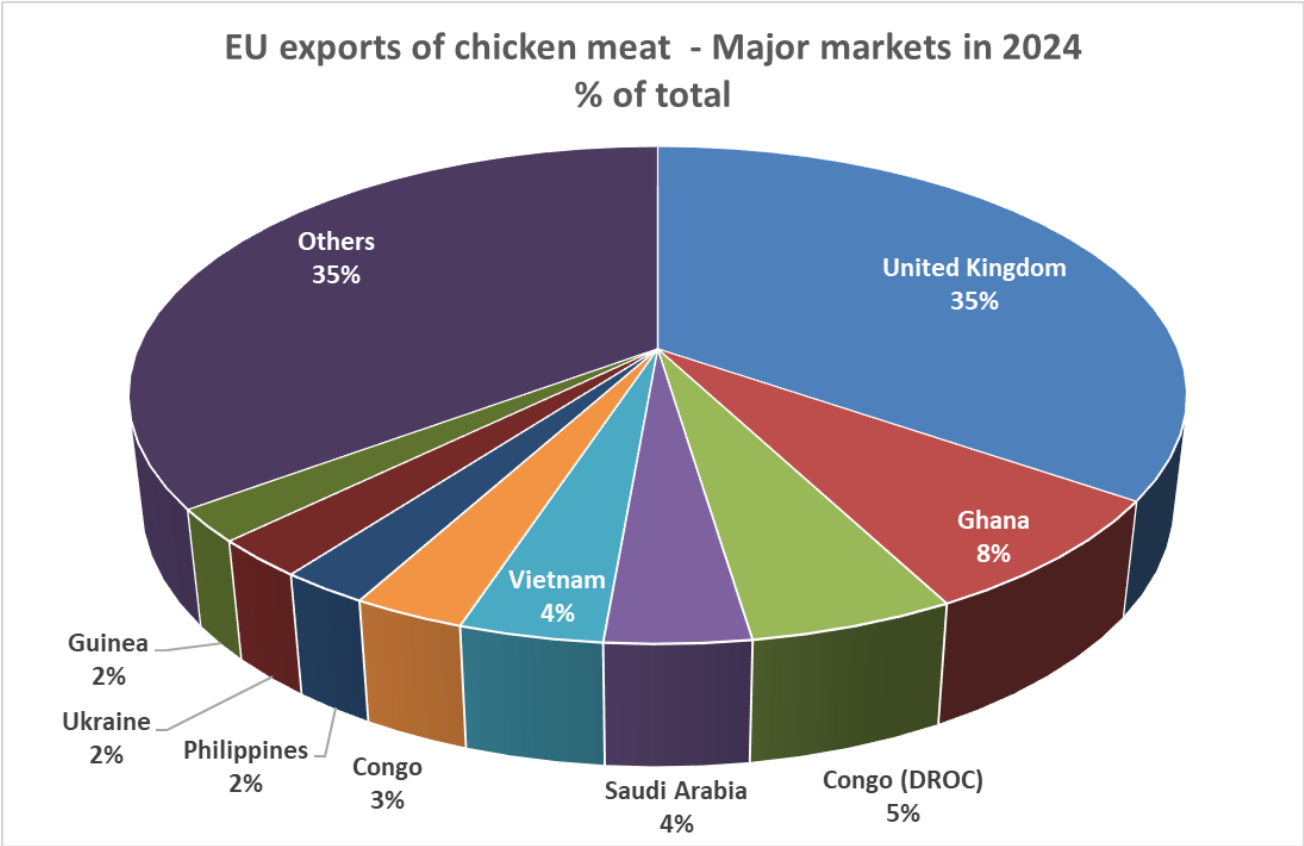
The UK is the largest customer of EU chicken meat. Dark chicken meat cuts are exported to Africa

The UK is now the single largest market for EU chicken meat, accounting for 35 percent of EU exports. EU exports to the UK consist of mostly fresh and chilled chicken cuts (close to half of exports) as well as preserved or prepared chicken meat and offal. Sub-Saharan countries led by Ghana, Democratic Republic of Congo, Congo and Guinea are major outlets for low-priced, frozen chicken meat cuts (mostly dark meat and mechanically deboned chicken meat). Vietnam, Philippines and Cuba are also major export markets for low-cost EU frozen chicken cuts.

After several years of decline, EU exports of frozen whole chickens to Saudi Arabia stabilized in 2024 but a decline is now estimated for 2025 as Brazilian, Ukrainian and Russian chicken meats are more competitive than EU chicken meat on the Saudi market.

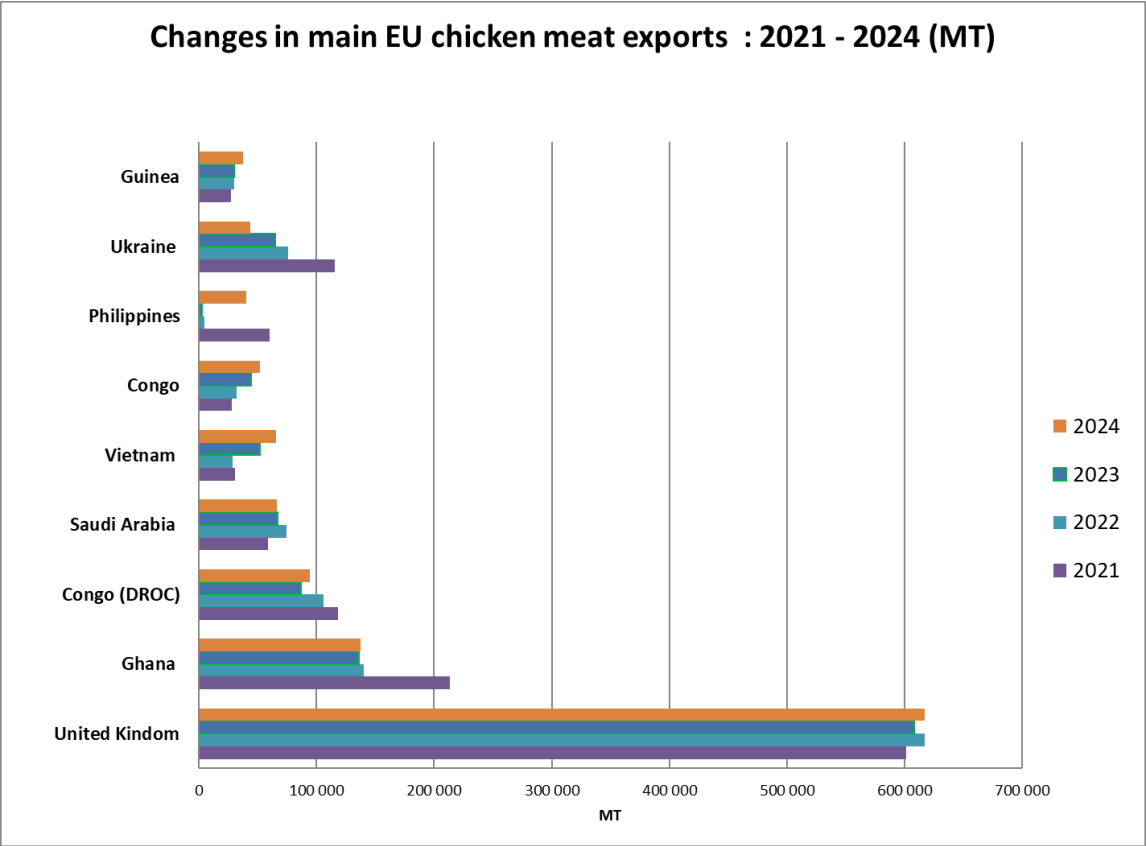
EU domestic consumers prefer breast and premium white meat cuts. Thus, the EU primarily exports dark meat cuts. Despite increasing production costs, EU dark meat remains price competitive in the international market.

Figure 7



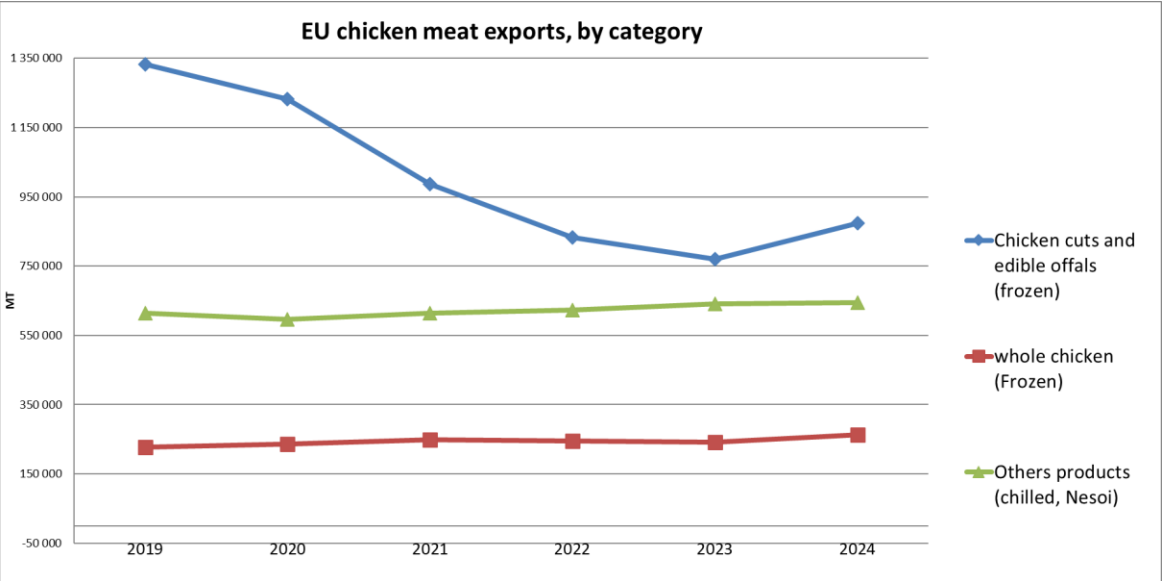
(Source Trade Data Monitor data)

Figure 8



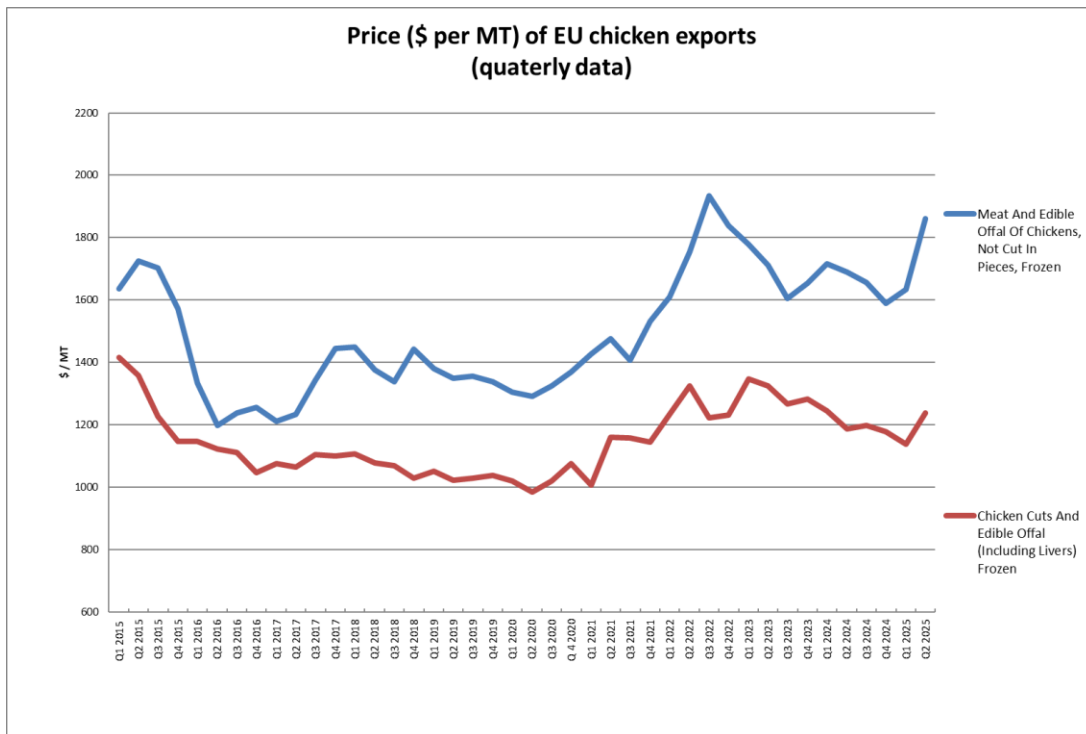
(Source Trade Data Monitor, FAS Posts estimates)

Figure 9



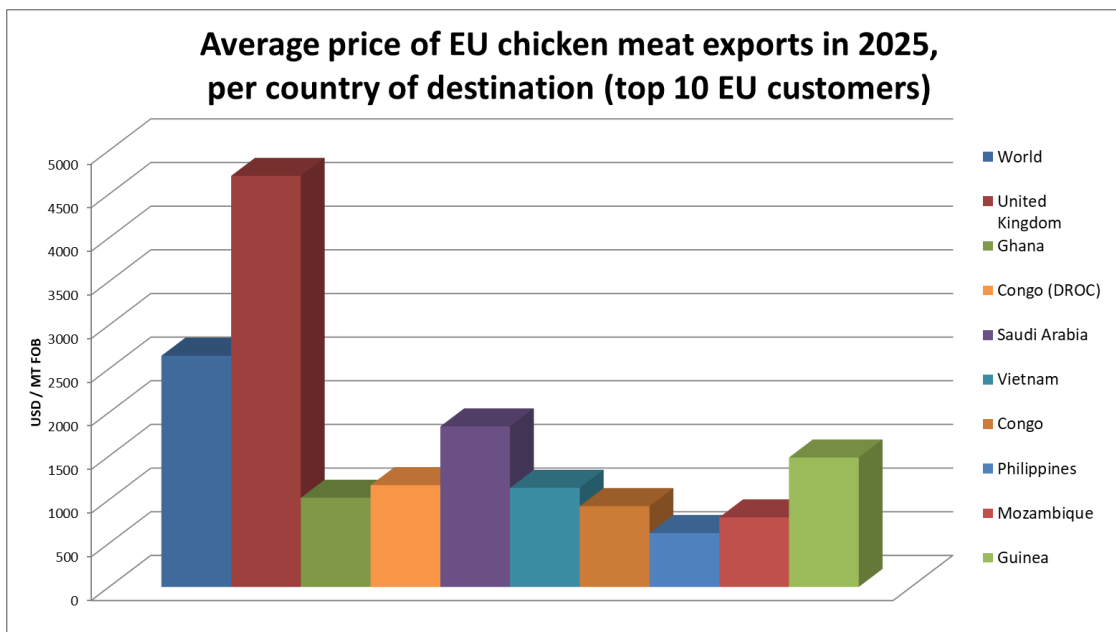
(Source Trade Data Monitor)

Figure 10



(Source Trade Data Monitor)

Figure 11



(Source Trade Data Monitor, data for Jan- June 2025)

Domestic Consumption

Chicken meat consumption will continue to grow

Numerous data sources indicate that **consumption of chicken meat is growing faster in the EU compared to other animal proteins**, even as the price difference with pork meat has recently narrowed in many EU counties. After pork, it is the second largest meat consumed in the EU. EU chicken meat consumption is expected to grow by 1.8 percent in 2025 and 1.6 percent in 2026. Data show that growth in chicken consumption is closely related to demographic growth, and per capita consumption is expected to increase slightly. EU chicken meat consumption in 2025 and 2026 will likely continue to benefit by the influx of 6 million Ukrainian war refugees in Europe as well as a steady flow of migrants from the southern hemisphere.

As the lower-priced source of animal protein, chicken meat remains somewhat more insulated from the pressures of high food inflation and energy costs in Europe. Market studies on price and income elasticity of demand generally show that EU consumers substitute from beef or pork meat to chicken meat while lowest-income consumers tend to reduce their purchases of animal protein altogether, switching to carbohydrate products such as bread and pasta.

In most EU countries, **chicken meat is popular in institutional cafeterias, as there are fewer religious restrictions compared to beef and pork**. This aspect is increasingly important as communities are becoming more diverse. This is especially true for food service and tourism. In the EU, sales of less expensive cuts, such as legs and wings, are also increasing. In several EU countries, such as Germany, France and Poland, the shift to chicken meat consumption is also aided by the perception that it is a healthier and leaner meat, and it is generally easier to prepare.

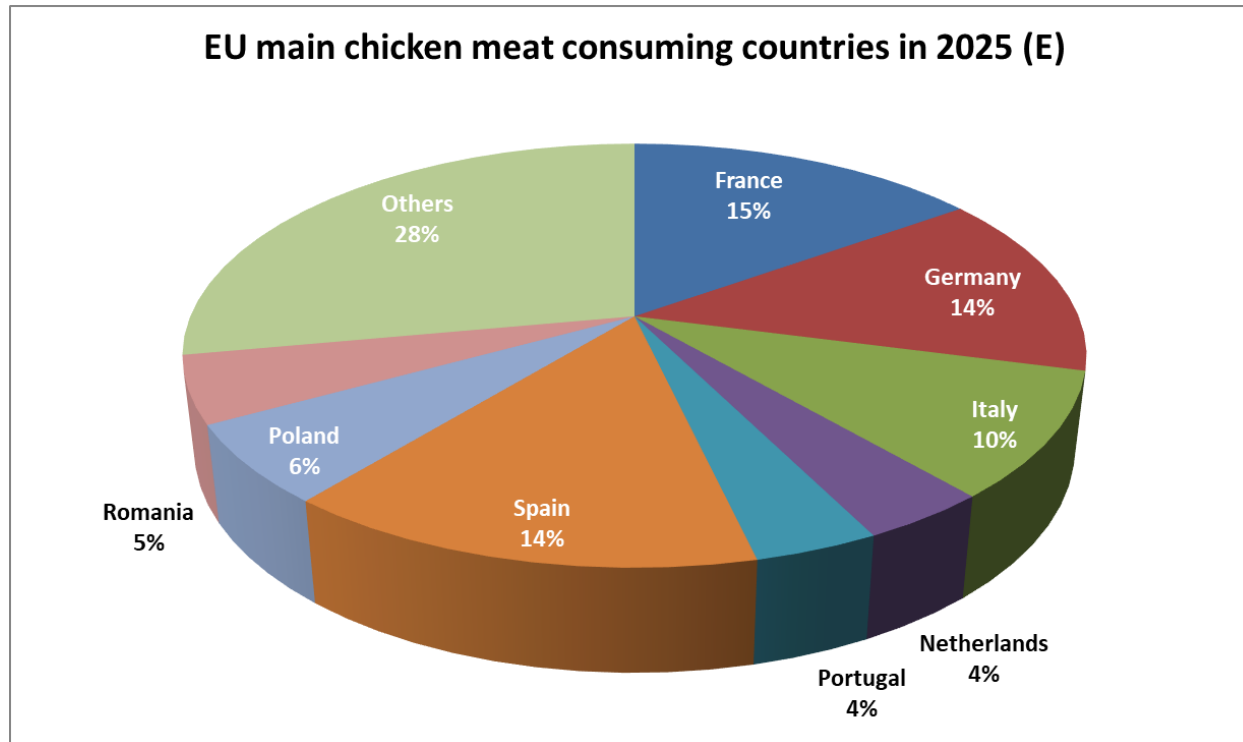
Demand is increasing for chicken produced with specific methods or feeds but remains a small portion of consumption.

Consumer preferences for animal welfare, such as cage-free and free-range chickens, or type of feed, such as GMO-free chicken or organically produced chicken, are increasingly visible on the label and at the point of sale.

The free-range sector in France represents about 10 percent of total consumption. Media campaigns by animal rights organizations such as the L214 association in France have drawn attention to the mistreatment of chicken on poultry farms and slaughterhouses. This has not had a significant impact on chicken meat sales, but these efforts are boosting the development of non-conventional chicken production schemes.

The growth of specific production schemes is also significant in the Netherlands, Germany and Austria. In some cases, retail prices for these products are double the price of the more conventional options. Locally sourced chicken is also driving demand. In Austria, retailers are prominently advertising local and regional suppliers. At same time, this exposes the glaring conundrum of increasing consumer demand for locally produced chicken, while many communities are hardening their resistance to expanding poultry farms in their communities.

Figure 12



(Source FAS Posts)

Policy

EU Vision for Agriculture and Food

On February 19, 2025, the European Commission 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 Commission 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 European Commission published a [proposal](#) to simplify the CAP. The proposed measures target the administrative burden, controls, and implementation of the CAP, as well as the CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs, for good agro-environmental conditions) linked to eco-payments for farmers. It is way too early to forecast the impact of this proposal on chicken meat production. 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 European Commission unveiled the much-anticipated plan for the next Common Agricultural Policy (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. More information in GAIN report E42025-0004: [European Commission Unveils CAP Reform with Budget Cut and Structural Change](#).

The Green Deal

On December 11, 2019, the EC announced the [European Green Deal](#). With the Green Deal, the EU aims to be carbon neutral by 2050. Because the EU livestock sector is specifically identified as critical for the EU to reach its greenhouse gas (GHG) emission reduction targets, the EC commissioned an external [Study on the Future of EU Livestock](#) that was published in October 2020.

Industrial Emission proposal

On March 15, 2024, the European Parliament adopted the revision of the Industrial Emissions Directive (IED). The revised Directive awaits publication in the EU Official Journal. The new text amends [Directive 2010/75/EU](#) which regulates the environmental impacts around Europe’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 with specific emissions conditions and permit requirements. The updated Directive will apply to poultry farms with more than 300 livestock units (LSU) for laying hens and 280 LSU for broilers.

Trade Policy

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions. 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 European Commission [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 European Commission 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 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 of 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 TRQs with a 5-year phase in period:

- 90,000 metric tons (carcass weight equivalent) for boneless poultry meat
- 90,000 metric tons (carcass weight equivalent) for bone-in poultry meat

Mexico:

On January 17, 2025, the EU and Mexico announced the conclusion of a new Free Trade Agreement. As with 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.

Additionally, Mexico will be allocated a new poultry TRQ of 10,000 metric tons (carcass weight equivalent) with a 3-year phase in period for the following CN codes: ex 02071310, 02071320, 02071350, 02071360, 02071370, ex 02071410, 02071420, 02071450, 02071460, 02071470, 02072710, 16023211, 16023219, 16023230, 16023290.

EU-US Trade Relationship

On July 27, 2025, U.S. President Trump and European Commission 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 [European Commission's explanatory webpage](#).

To ensure effective implementation of the political agreement, the European Union published [Implementing Regulation 2025/1727](#), suspending its retaliatory tariffs on certain U.S. products imposed by [Implementing Regulation 2025/1564](#).

New EU Animal Welfare Legislation (AW)

In February 2025, as part of its [Vision for Agriculture and Food](#), the Commission 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 1999/74 on laying hens](#)
 - [Directive 2007/43 on broilers](#)

The Commission aims to present a legislative proposal for the first sectors by Q4 2026. For more information, please see GAIN [EU Launches Call for Evidence on New On-Farm Animal Welfare Legislation](#).

The new Commission'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, 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 Veterinary Medicinal Products 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 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 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.

Highly Pathogenic Avian Influenza (HPAI) Situation Update

The 2024-2025 (October to September) epidemic season started earlier, with detections of HPAI virus in migratory birds already in September 2024.

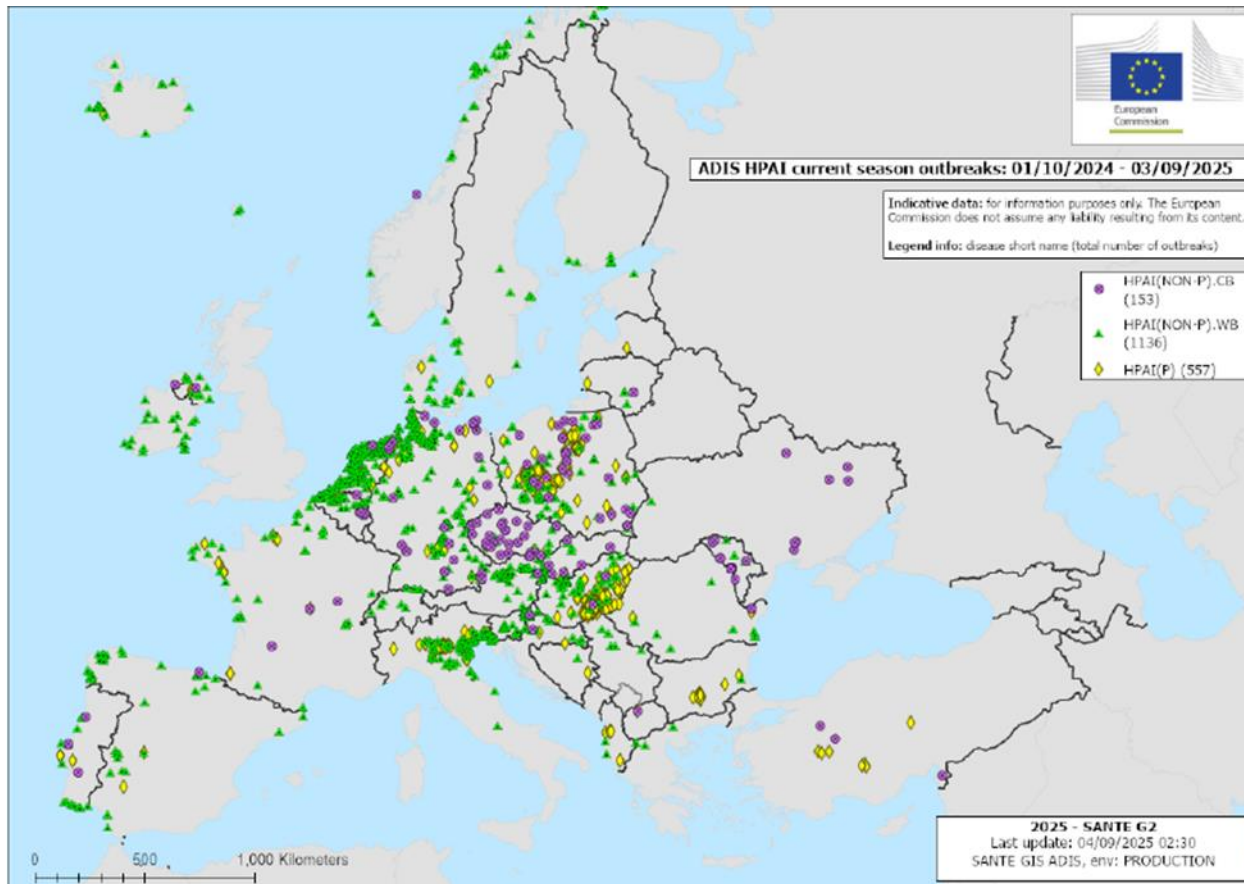


Figure 1: HPAI detections in the EU in the period October 1, 2024 –September 3, 2025

Source: European Commission: [Avian influenza - European Commission](#)

In 2023, with EU approval, France implemented a vaccination scheme for its domestic duck flocks targeting all commercial flocks over 250 birds. Following the [promising results](#), the [French Ministry of Agriculture continues](#) to fund 70 percent of the campaign costs, including vaccine procurement, storage, field vaccination, and active post-vaccination surveillance. Another vaccination campaign will start on 1 October 2025, 40 percent of the vaccination cost will be paid by the government, and 60 percent by the industry.

Related reports from FAS Posts in the European Union:

[Animal Diseases Shake Polish Poultry Industry Warsaw Poland PL2025-0007](#)

The GAIN Reports can be downloaded from the following FAS website:
<http://gain.fas.usda.gov/Pages/Default.aspx>

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Attachments:

No Attachments