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Report Highlights:

Driven by strong internal demand and larger exports, and with fewer HPAI outbreaks, EU chicken meat production is expected to grow by two percent in CY 2026. In 2026, Poland will remain the largest EU chicken meat producer, accounting for more than 22 percent of total EU production. The EU trade surplus in chicken meat is expected to increase in CY 2026 as HPAI related bans are lifted and imports from Ukraine are increasingly constrained by EU policy and regulations.

DISCLAIMER

The PSD data contained in this report are the result of a collaborative effort by USDA FAS offices in the European Union to consolidate estimates. Official USDA data for the EU are reported on the USDA FAS PSD Online website - https://apps.fas.usda.gov/psdonline/

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Commodity: Chicken, Meat

Table 1

Chicken Meat Production, Supply and Distribution

Meat, Chicken	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	11729	11735	11820	12090	11970	12250
Total Imports (1000 MT)	729	723	775	743	840	760
Total Supply (1000 MT)	12458	12458	12595	12833	12810	13010
Total Exports (1000 MT)	1772	1772	1750	1743	1725	1775
Human Consumption (1000 MT)	10686	10686	10845	11090	11085	11235
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	10686	10686	10845	11090	11085	11235
Total Use (1000 MT)	12458	12458	12595	12833	12810	13010
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	12458	12458	12595	12833	12810	13010
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

European Union (EU) chicken meat production in calendar year (CY) 2026 is forecast to grow by 1.3 percent after a three percent growth in CY 2025. Significantly fewer Highly Pathogenic Avian Influenza (HPAI) outbreaks in major EU producing countries, lower competition from Ukrainian chicken exports to the EU, and the strong dynamism of the domestic demand help support the growth in production. Chicken meat production also benefited from lower energy and feed prices in 2025 supporting producers' income, particularly in Poland and Spain, the two largest EU chicken meat producers. This trend is expected to continue in 2026, further expanding production in those countries.

In several countries, such as the Netherlands, Belgium and Germany, environmental constraints such as the reduction on nitrogen emissions will constrain production expansion in CY 2026. French chicken meat production increased again in CY 2025, fueled by strong internal consumer demand, and the growth is expected to continue in CY 2026.

In the wake of the HPAI outbreaks, EU Member States are continuing to reinforce surveillance and biosecurity measures on poultry farms and in some cases even instituting temporary bans on free-range farms. (For more information on diseases, see Policy section.)

In Poland, an increasing number of Newcastle Disease (ND) cases have been reported. In 2025, Poland reported 53 outbreaks of ND in commercial broiler farms out, of a total of 83 cases in poultry farms, leading to the culling of almost 7.1 million broilers. In addition, some trading partners banned imports of poultry meat from the impacted regions, with the exception of heat-treated products. In response to the 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 on April 29, 2025, while the provisions on the obligatory ND vaccination of chicks and turkeys entered into force on May 13, 2025. Similarly, Spain lost its ND-free status in December 2025, for the first time since 2022. (For more information on diseases, see Policy section.)

Consumption

EU domestic consumption of chicken meat is expected to increase by 1.4 percent in CY 2026 as both retail sales and consumption in the HRI sector will continue to increase.

Over the longer term, chicken meat consumption is expected to continue growing as consumer preferences continue to favor chicken over other animal protein sources. Chicken meat is generally more affordable than other meats. European consumers also generally consider chicken meat to be healthier, more versatile, and easier to prepare.

Trade

Imports

EU chicken meat imports are expected to increase by one percent in CY 2026, after a 5.4 percent increase in CY 2025, driven by the strong demand within the European HRI sector, which accounts for the largest share of imported chicken. Imports from the United Kingdom (now the largest chicken meat supplier to the EU) declined by eight percent in CY 2025 due to the strict sanitary controls imposed by the EU, remaining well below their pre-Brexit levels. No rebound in UK shipments is expected for CY 2026.

At 136,000 MT, EU imports of Ukrainian chicken meat remained flat CY 2025 as a direct consequence of the EU decision to implement reinforced safeguard measures to protect EU farmers. At the same time, the Ukrainian government set up export licenses, thus limiting Ukrainian chicken meat exports to the EU. The implementation of the revised DCFTA (Deep and Comprehensive Free Trade Agreement) since October 2025 (see Policy section) is expected to limit further growth of EU imports of Ukrainian chicken meat in CY 2026.

Chicken meat imports from Thailand benefited from the lower competition from Ukraine and grew by 16 percent in CY 2025. Imports of chicken meat (mostly cooked chicken meat and chicken offal) from China grew by 36 percent in 2025 to more than 55,000 MT, most of it going to the Asian style HRI sector. Further growth of imports from China is anticipated in CY 2026. On the other hand, imports from Brazil declined slightly, capped by the EU quota system.

Exports

Competition from lower-priced Ukrainian chicken meat and continuing HPAI and ND outbreaks in CY 2026 (even if fewer cases were reported) may continue to restrain EU chicken meat exports. On the other hand, lower production costs due to lower energy and feed costs will continue to improve EU chicken meat competitiveness. Thus, EU chicken meat exports are expected to grow slightly, by two percent in CY 2026, regaining the CY 2024 level.

EU chicken meat exports declined by two percent in 2025. The decline was driven by a 14 percent decrease in EU chicken meat exports to Vietnam (56,000 MT), and a 21 percent decline to Saudi Arabia (52,000 MT), which were not offset by higher exports to Ghana (158,000 MT, up 15 percent), Democratic Republic of Congo (117,000 MT, up 23 percent) and the Philippines (67,000 MT, up 65 percent). Overall, EU chicken meat exports to sub-Saharan countries stagnated in CY 2025. There is hope that the lower production costs in the EU in CY 2026, combined with the higher profitability of white meat cuts in EU domestic markets, could increase the EU chicken meat export competitiveness (of mostly dark meat cuts) in those African markets.

The UK remained the largest market for EU chicken meat (down 0.5 percent in CY 2025), driven by strong Polish and German chicken meat exports and despite strong competition from Thai, Brazilian, Chinese and Ukrainian chicken meat. It is anticipated that it will remain the EU's largest market in CY 2026

Policy

Common Agricultural Policy (CAP)

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[1]. The simplifications were published in the Official Journal on December 19, 2025, for implementation starting in 2026.

EU Omnibus on Food and Feed Safety

On December 16, 2025, the European Commission published a proposal for an omnibus regulation to simplify and strengthen food and feed safety requirements in the EU. This Regulation seeks to amend ten legal acts to simplify EU food and feed legislation. However, the proposed regulation also includes certain provisions based on the EU's "mirror clause" concept that will impose EU environmental, food safety, and animal welfare production standards on imported products, thus creating new trade barriers.

[1] For more information, please see GAIN Report: EU Commission Proposes Common Agricultural Policy Revisions Following Farmer Protests.

Trade

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 European Commission announced that negotiations were finalized for an EU-Mercosur partnership agreement. Following this political agreement, the text was split into two parts: an Interim Trade Agreement (iTA), which covers trade and investment, and a broader Partnership Agreement (EMPA). On January 17, 2026, representatives from the EU and the four Mercosur countries (Argentina, Brazil, Paraguay, and Uruguay) formally signed the agreements in Asunción, Paraguay. The agreement includes a bilateral safeguard clause to protect agricultural sectors from serious injury or market disruption. On February 10, 2026, the European Parliament approved strengthened safeguard regulations that allow for the temporary suspension of tariff preferences if imports of sensitive products increase by more than five percent over a three-year average. The agreement is currently undergoing a legal review by the European Court of Justice (ECJ) following a request from the European Parliament in January 2026 to ensure its compatibility with EU treaties. 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.

Ukraine: The European Union 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. 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 EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) entered into force (Regulation (EU) 2025/2199). The new DCFTA updates the original agreement from 2014. 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. For more information, please see GAIN Report European Union Revises Import Quotas for Agricultural Products from Ukraine.

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 the main drivers of deforestation, including cattle. In December 2024, the EU postponed the date of entry into application of the EUDR by one year to December 30, 2025.

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. The new Regulation also calls on the Commission to publish a simplification review of EUDR by April 30, 2026. For more information about the changes introduced by Regulation 2025/2650, please see GAIN Report: EU Adopts Changes to Deforestation Regulation.

Highly Pathogenic Avian Influenza (HPAI) Situation Update

Since the autumn of 2021, HPAI outbreaks have plagued the EU poultry sector. However, since the 2024/25 period, fewer cases have been reported than in previous years, even if a slight surge among wildfowl was reported in 2025/26. France has implemented a vaccination program for its domestic duck flocks since the fall of 2023 with EU approval.

For more information, refer to the European Commission website : https://food.ec.europa.eu/animals/animal-diseases/diseases-and-control-measures/avian-influenza_en

Newcastle Disease (ND) Situation Update

Newcastle Disease (ND) is spreading to more countries in Europe, and in countries where the disease was already prevalent, the number of infected farms has been steadily increasing.

In addition to Poland, which reported several dozen cases in 2025, Spain reported its first case on a chicken farm in December 2025, with more reported in early 2026. ND was also detected in Slovakia and in small Bulgarian poultry farms in 2025.

In addition, Latvia and the Czech Republic reported outbreaks in non-commercial poultry farms in December 2025. More information on the ND situation in Europe can be found on the EU Animal disease web portal and the EU Animal Disease Information System (ADIS).

Attachments:

No Attachments