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Report Highlights:

Driven by strong internal demand, EU chicken meat production is expected to continue growing in 2027. In 2027, 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 increase in 2027 with significantly lower imports if the EU ban on Brazilian chicken meat which started in September 2026 continues into 2027 while EU Exports could be slightly constrained by increased competition from Brazilian meat in export markets.

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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Executive Summary

Driven by strong internal demand and lower import competition, European Union (EU) chicken meat production is expected to grow in 2027 by more than two percent. The impact of the 2026 droughts and heatwaves in western and central Europe on feed grain prices and availability will raise production costs. However, as seen in previous periods of high feed costs, chicken meat producers are expected to pass those increases to the retail sector.

In 2027, 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 further increase by 3.8 percent in 2027. Production in every other EU country will increase, except for the Netherlands where increased competition from imports, both from EU and non-EU suppliers, will hamper the production. EU chicken meat production may also benefit in 2027 from the absence of competition from Brazilian chicken meat due to the EU ban which started on September 3, 2026.

As of June 2026, Europe had the lowest number of recorded Highly Pathogenic Avian Influenza (HPAI) cases in poultry and wild birds since 2019/2020. The impact of HPAI on the EU chicken meat sector is generally limited as most cases concerned laying hens, turkeys and duck farms.

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.

The EU chicken meat trade surplus is expected to increase in 2027 as imports will be curtailed by the ban on Brazilian chicken meat that was set on September 3, 2026. As it is assumed that the ban on Brazil will extend through 2027, EU chicken imports will decline as Brazil will not be fully replaced by other suppliers such as Thailand, UK, Ukraine and China. On the other hand, exports may slightly decline as the EU is likely to face increased competition from Brazil in its traditional markets as Brazil seeks alternative markets for displaced shipments.

The European Commission voted in May 2026 to remove Brazil, the largest supplier of chicken meat to the EU, from the list of countries authorized to export animal-origin products to the EU due Brazil's non-compliance with EU rules on antimicrobial use in animal production. The ban took effect on September 3, 2026. This report assumes that Brazil will not be able to export chicken meat to the EU in the last quarter of 2026 and for the entirety of 2027, as policies in place at the time of the report are assumed for the duration of the forecast period.

Thailand is now forecast to be the largest supplier of chicken meat to the EU in 2027. Imports from Thailand primarily consist of cooked chicken meat, as well as processed and salted poultry preparations.

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.

While EU chicken meat imports from Ukraine have doubled since 2022, the implementation in 2025 of the revised EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) limits EU imports of sensitive agricultural products from Ukraine. Consequently, EU imports of Ukrainian chicken meat are expected to remain stable in 2027.

EU imports of chicken meat from China are also expected jump significantly in 2027. Chinese chicken producers located in Shandong province benefit from the tariff rate quotas on heat-treated chicken meat that were negotiated in 2019.

EU chicken meat exports are anticipated to decline by 1.3 percent in 2027, as the EU is likely to face increased competition from Brazil as it seeks alternative markets, including traditional EU export markets, for displaced product.

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 also negatively impacting the competitiveness of EU chicken meat. In 2026, several countries that have historically imported EU chicken meat such as the Philippines, have removed their HPAI restrictions on EU poultry meat.

Despite food inflation and higher energy costs, EU chicken meat consumption is expected to remain strong in 2027.

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. Chicken-based fast-food chains are also booming across Europe, driven by rising poultry consumption, affordability, and consumer preferences shifting away from red meat, combined with a preference for quick-service meals among younger generations.

Production, Supply and Distribution:

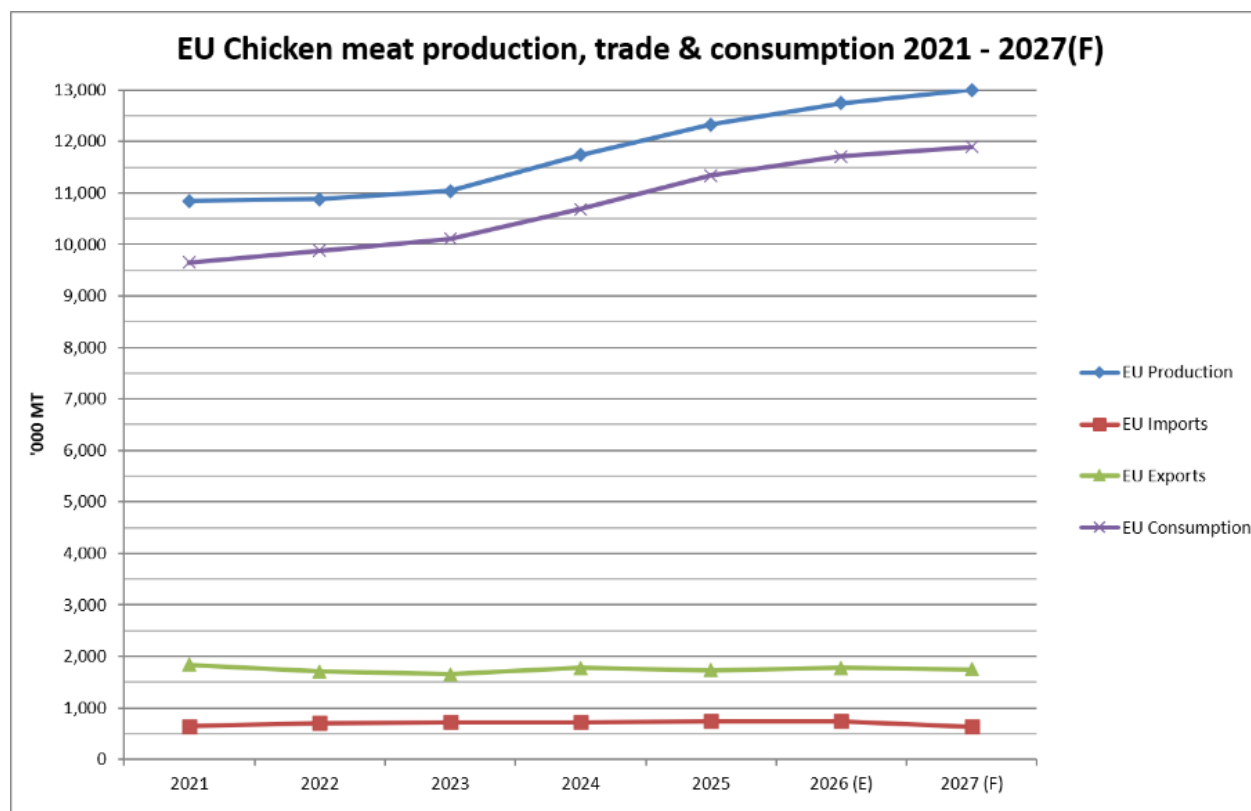
Chicken Meat PS&D Table

Meat, Chicken Market Year Begins European Union	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	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)	12090	12326	12250	12740	0	13000
Total Imports (1000 MT)	743	743	760	740	0	640
Total Supply (1000 MT)	12833	13069	13010	13480	0	13640
Total Exports (1000 MT)	1744	1735	1750	1773	0	1750
Human Consumption (1000 MT)	11089	11334	11260	11707	0	11890
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	11089	11334	11260	11707	0	11890
Total Use (1000 MT)	12833	13069	13010	13480	0	13640
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	12833	13069	13010	13480	0	13640

(1000 MT)

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Figure 1



(Source: FAS Posts)

Production

Estimates for EU production in 2025 have been revised due to newly available production data from Austria, Belgium, Germany, Czech Republic, Hungary and Poland.

EU chicken meat production is expected to increase by 2 percent in 2027 after a 3.4 percent growth in 2026. This increase is driven by sustained domestic demand and lower competition from Brazil due to the EU ban on Brazilian chicken meat which started on September 3, 2026 (see Trade section). Market conditions in the EU continue to favor less expensive animal protein.

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 2026, 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.

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, and chickens roaming outside are more likely to encounter wild birds that carry the HPAI virus.

The heatwaves and severe drought that impacted most of western and central Europe in the late spring and summer of 2026 had a negative impact on the EU poultry sector, with thousands of birds (mostly laying hens) dying from excessive heat. The direct impact on the chicken sector seems to be limited. The limited

availability and increased price of feed are more impactful, raising production costs. However, as seen in previous periods of high feed costs, producers should be able to pass increased costs to the retail sector.

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 the EU (44 percent of the production) or to extra-EU countries (26 percent of the production). FAS Warsaw estimates that Polish chicken production is expected to increase by 3.7 percent in 2027, after an eight percent growth in 2026, driven by the improved economic situation of the Polish poultry sector as feed costs declined in 2025 and in the first semester of 2026 and wholesale / retail prices increased. Analysts believe that the potential increase in feed costs in the last quarter of 2026 and early 2027 will be passed to the consumer.

Poland prolonged the suspension of the GE feed ban until January 1, 2030. As explained by the government, it was necessary to postpone the ban, because there are currently not enough alternative high-protein raw materials to eliminate soybean meal from feed production. Thus, the prolongation eliminated the risk of increased feed costs for the Polish poultry industry.

Poultry diseases remain the main threat for the Polish poultry sector. Polish authorities reported 128 HPAI outbreaks in poultry farms in 2025 and 143 outbreaks in the first semester of 2026, most of them in turkeys' and laying hens' farms. The Polish Chief Veterinary Officer (CVO) submitted a self-declaration to the World Organization for Animal Health (WOAH) on Poland regaining an HPAI-free status in poultry as of July 28, 2026. Poland also experienced several Newcastle Disease (ND) outbreaks, with 52 cases reported in commercial poultry farms in the first semester of 2026. In response to the increasing ND threat, the Polish government introduced additional disease control measures in 2025 and extended them into 2026. They included provisions on biosecurity, guidance for stocking henhouses in ND infected areas, and provisions on the obligatory ND vaccination of chicks and turkeys in force since May 2025.

Poultry production in **Spain**, the second largest EU chicken meat producer in 2027, is expected to expand production driven by positive margins, steady domestic demand, together with strong price competitiveness compared to other EU Member States and third country markets. Spanish chicken meat prices have risen faster than feed costs resulting in positive feeding margins for the industry. 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 domestic groups increasing their market share through acquisitions. 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 has owned a majority share of [Uvesa](#) since the spring of 2025. In June 2026, MHP also announced an agreement to acquire Payán Hermanos, a poultry company in Granada. Following these acquisitions, MHP expects to be among the major industrial players in Spain's meat and poultry sector. The Dutch group [Plukon](#), which continues to expand its presence through facility acquisitions in central Spain, agreed in May 2026 to acquire Avimosa, a fully integrated Spanish poultry company based in Madrid and Toledo with operations spanning feed production, hatching, farming, and processing.

Spain has been free from HPAI since February 2026. On the other hand, Spain experienced several outbreaks of ND, leading to the implementation of vaccination programs in impacted regions.

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. More than 50 percent of the chicken meat consumed in France is now imported, most of it from other EU countries (notably Poland and Germany). The largest French (and EU) poultry company, [LDC](#) (Lambert Dodard Chancereul), has significantly strengthened its position in recent years through acquisitions of competitors and poultry meat processors. In February 2026, LDC secured approval to acquire [France Poultry](#), the French leader in frozen chicken exports previously owned by the Saudi group [Almunajem](#). The long-distance export chicken business

is set to be phased out starting in 2027, while LDC plans to build a new specialized chicken slaughterhouse, with operations expected to begin in early 2028.

Chicken meat production in **Germany** is expected to grow only marginally (by less than 1.5 percent) in 2026 and 2027. Chicken population densities on German farms are increasing as a consequence of the difficulties to obtain permits for new sheds, which is a significant factor limiting growth in production. To maximize their slaughtering capacity, chicken meat processors imported more live chickens for slaughtering, mainly from the Netherlands, accounting for up to six percent of total slaughters in 2025. The trend was discontinued in the first half of 2026, mainly due to logistical reasons.

In **Italy**, chicken meat production is expected to grow in 2026 and 2027 and will likely reach levels not achieved since before the HPAI outbreaks in 2020.

In the **Netherlands**, despite record income for Dutch chicken producers, production is now foreseen to stabilize or slightly decrease in 2026 and 2027, due to competition from Poland and extra-EU imports, notably from Thailand. About 40 to 50 percent of Dutch production is now dedicated to the form of higher-end production marketed as “slow growth” birds by the Dutch retail market 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. Another factor for the stagnation and potential decrease of the Dutch poultry industry is the government plans to reduce nitrogen emissions. On June 26, 2026, the new Dutch Cabinet proposed a EUR 20 billion nitrogen plan to reduce nitrogen emissions from agriculture and other sectors and restore nature by 2035. The plan introduces new farm-level ammonia emission standards and nitrogen-sensitive zones around Natura2000 areas (15 areas with one-kilometer zones and around 85 areas with 500-meter zones). How this will precisely affect farmers remains unclear. The plan has political support in the Parliament but will also require approval in the Senate.

In **Romania**, the chicken industry is expected to increase by six percent in 2026 and three percent in 2027 driven by strong domestic and export demand. Despite persisting high inflation, chicken consumption is forecast to recover in the following two years, after declining in 2025. No HPAI outbreaks have been detected in commercial farms in 2026.

Prospects for **Bulgarian** chicken production in 2026 and 2027 are positive, with annual growth of more than 2.5 percent. Consumer demand remains strong, with an increase in retail and food service sales. The vertical consolidation of chicken production in Bulgaria continued in 2026, and large farms now account for 99 percent of Bulgaria’s total chicken production.

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 to more than 80 percent of the total Belgian production. The growth in Belgian production is achieved primarily through economies of scale—fewer specialized poultry farms, but larger houses and more birds per farm.

Among animal products, poultry is the most stable sector in **Hungary**. Although HPAI outbreaks negatively affected Hungary’s poultry industry in previous years, the impact on chicken operations was contained thanks to immediate quarantine measures and the mandatory closed-house systems in place. As the number of HPAI outbreaks declined dramatically, due to changes in bird migration routes resulting from climate emergency events leading to severe droughts, and the reduction of wetland areas, Hungary regained its HPAI-free status on May 8, 2026. Hungarian chicken production is anticipated to slowly grow in 2026 and 2027 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.

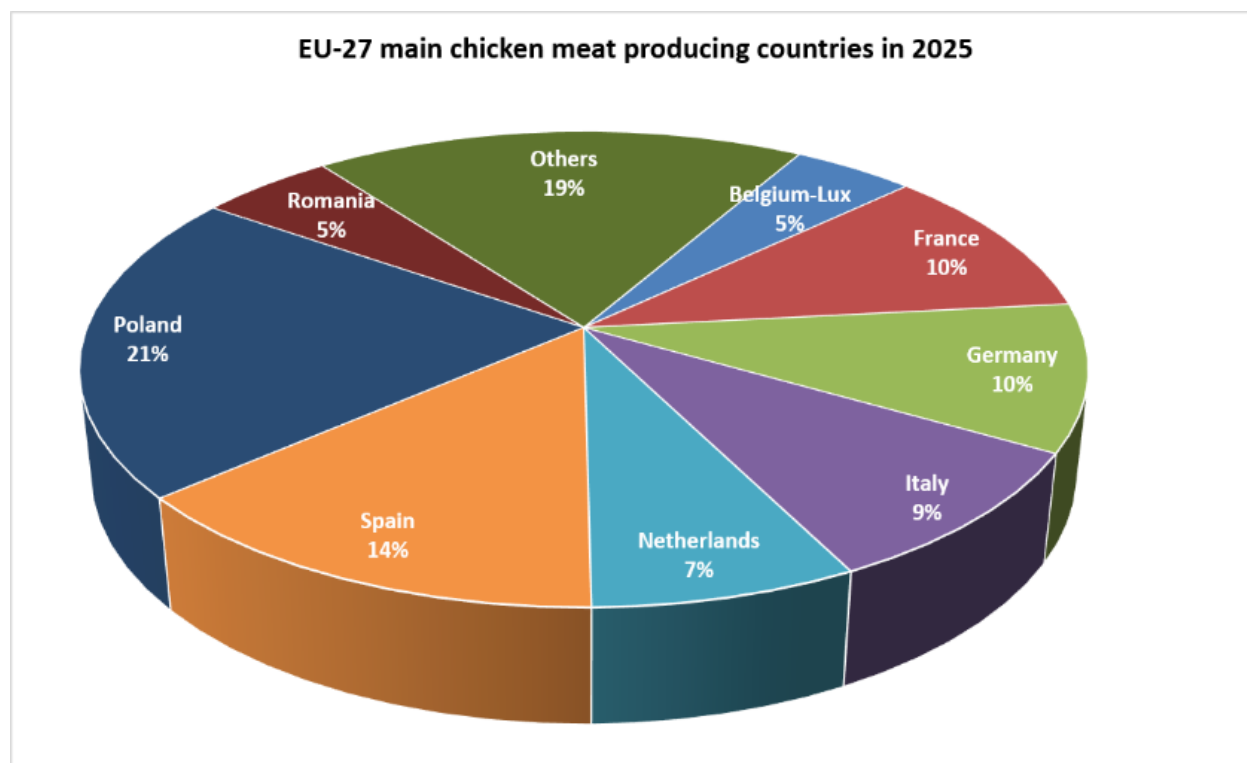
The Ukrainian company MHP announced in April 2025 that it will shelve its plans to build three chicken farms (producing six million chicken birds annually) in **Croatia** by 2027. MHP also owns the local company Perutnina Ptuj (purchased in 2018) and recently announced that it wants to increase revenues to one billion euros by 2027. They now plan to grow their business organically and not through external purchases. The EUR 608 million (USD 700 million) project of another Ukrainian company, Premium Chicken Company (PCC), was censured in March 2026 by the Croatian Ministry of Environmental Protection and Green Transition which suspended the development of the poultry processing complex in Sisak, ruling that the project does not comply with the city's current spatial and urban plans. The project had strong opposition from local citizens and local authorities. It was planning a production of 150,000 MT of chicken meat annually.

Chicken meat production in **Slovakia** is forecast to remain stable in 2027, following strong growth in 2026. Investments in slaughtering and processing facilities strengthened the competitiveness of the sector, while lower feed costs than in recent years continue to support profitability. Further expansion is expected to slow as existing processing capacity becomes more fully utilized, although HPAI remains the principal production risk.

The Slovak poultry sector continues to expand its role as a regional processing and trading hub. Domestic consumption is expected to increase only modestly, while production growth is increasingly supported by processing activity and export opportunities. As an example, 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 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.

In **Czechia**, Chicken meat production is forecast to increase moderately in 2027, following continued growth in 2026. Investments in modern production facilities are expected to support production. However, further expansion is likely to remain gradual because of labor shortages, regulatory costs, and continued uncertainty related to HPAI.

Figure 2



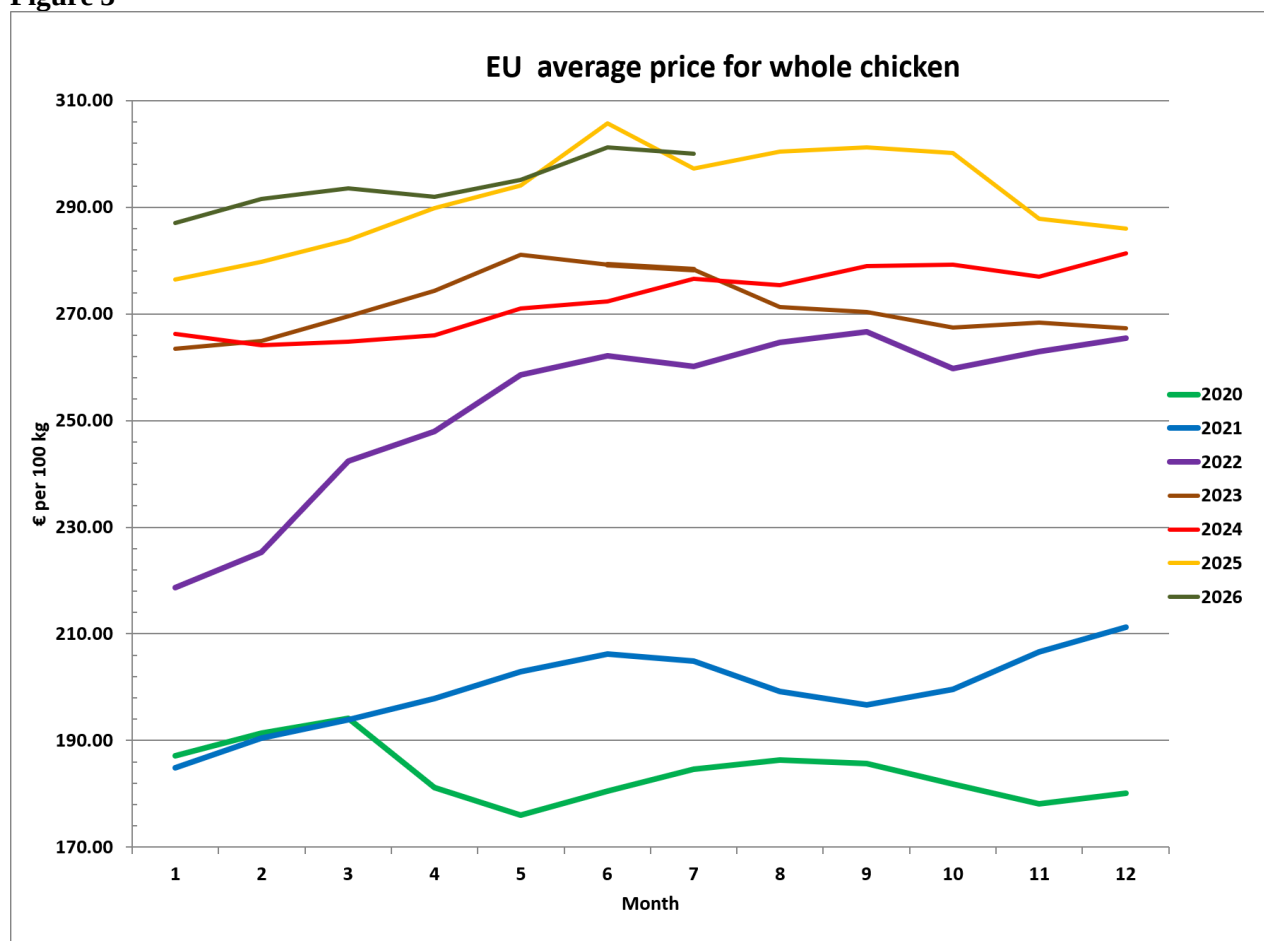
(Source: FAS Posts)

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 and 2025 fueled by strong internal demand, and initial data for the first six months of 2026 show further increase, well above the 2022 levels, indicating that prices are again rising, also driven by demand. Weaker competition from imports in 2027 should Brazil not being able to export to the EU, combined with higher feed cost as heatwaves and drought in 2026 in western and central Europe reduced grain crops, may further fuel price inflation in chicken meat.

Figure 3

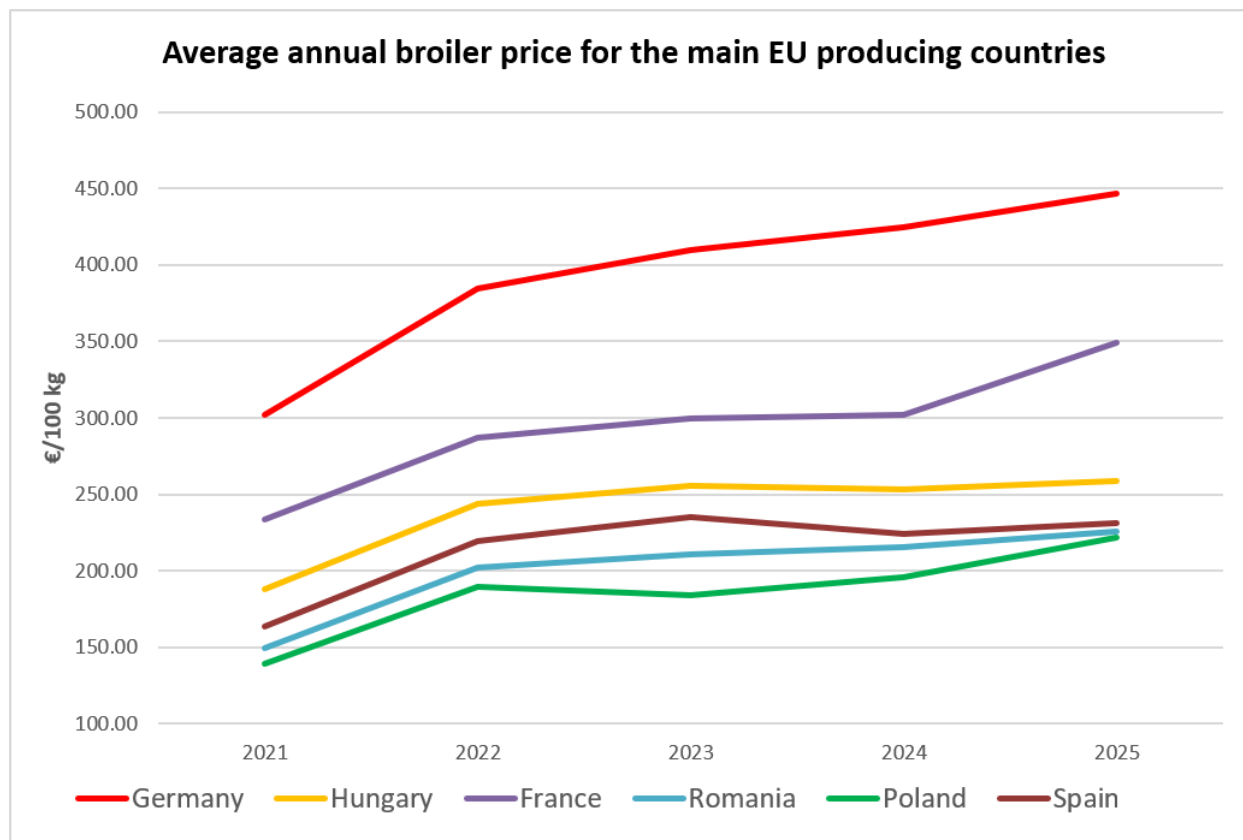


(Source: European Commission, data for broilers only)

But significant price differentials within the EU

Within the EU, there are significant price differences between Member States. This is particularly true for chicken meat. On average, chicken prices in Germany are 2 EUR per kilo (USD 1.06 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. However, the figure below shows that Polish chicken prices are climbing and are now almost on par with Romanian and Spanish chicken prices, illustrating a slow erosion of Polish price competitiveness within the EU.

Figure 4



(Source: European Commission, data for broilers only)

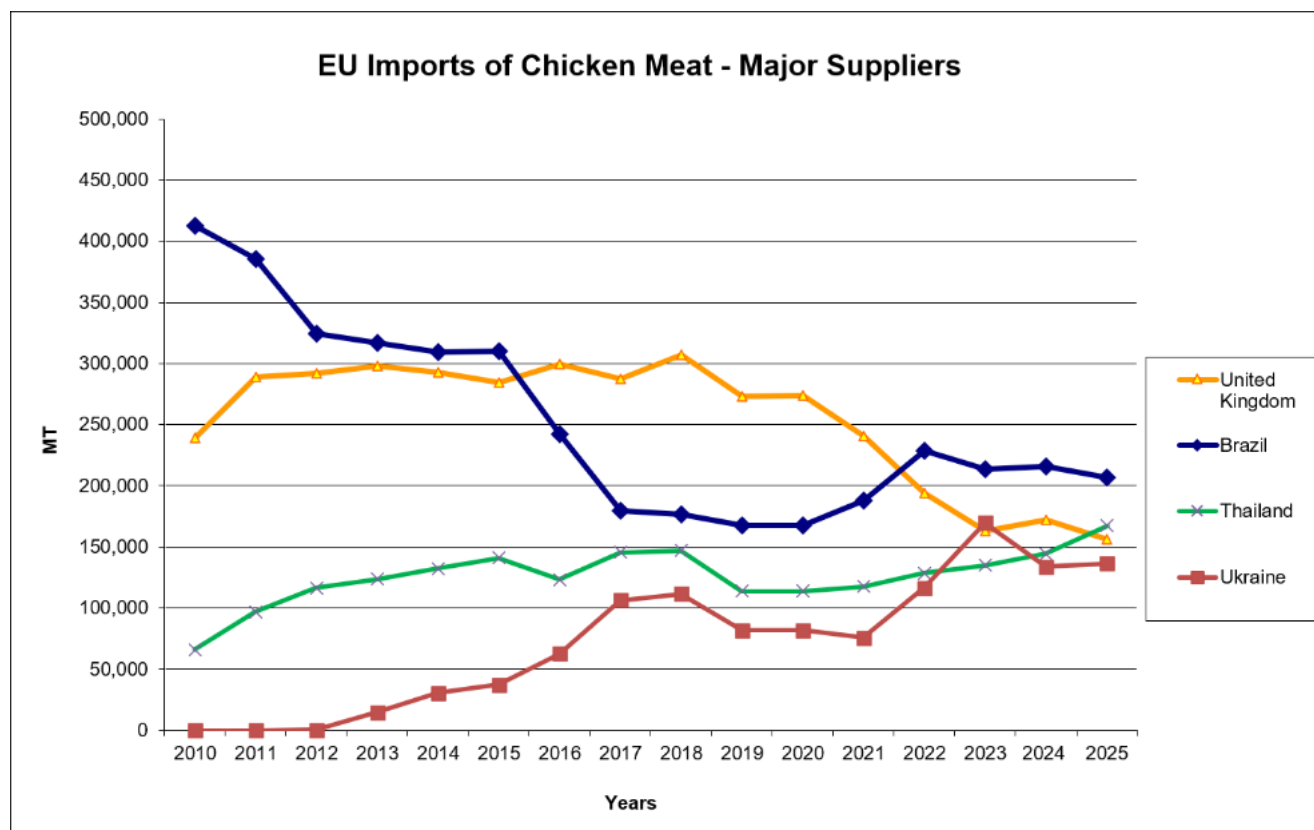
Trade

The EU chicken meat trade surplus is expected to increase in 2027 as EU imports will decline due to the delisting, as of September 3, 2026, of Brazil as a country eligible to export animal products to the EU. As it is assumed that the ban on Brazil will extend through 2027, EU chicken meat imports will decline as Brazil will not be fully replaced by other suppliers such as Thailand, UK, Ukraine and China. Exports may slightly decline, as the EU is likely to face increased competition as Brazil seeks alternative markets for displaced shipments. The UK is the EU's **third largest supplier and is also the leading customer** of EU chicken meat. **However, the balance of trade favors the EU. The EU exports almost four 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 the 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 2027, under an EU trade ban enacted on September 3, 2026, **Brazil is expected to be kept out of the EU market, losing its status as the largest supplier of chicken meat to the EU**, ahead of the Thailand and UK.

Despite the approval of the MERCOSUR Agreement (see Policy section), the European Commission's Standing Committee on Plants, Animals, Food, and Feed (SCoPAFF) voted in May 2025 to **remove Brazil from the list of countries authorized to export animal-origin products to the European Union** due to Brazil's non-compliance with EU rules on antimicrobial use in animal production. **The ban took effect on September 3, 2026**, though an EU inspection mission visited Brazilian facilities starting in August 2026 to review practices. This report assumes that Brazil will not be able to export chicken meat to the EU in the last quarter of 2026 and for the entirety of 2027, as policies in place at the time of the report are assumed for the duration of the forecast period.

Thus, even if Thailand, UK, Ukraine and China export more chicken meat to the EU in 2027, partly replacing imports from Brazil, **total EU imports of chicken meat in 2027 will be considerably lower until the EU remove its imports ban**. On the other hand, EU imports of Brazilian chicken in the first half of 2026 jumped by almost 30 percent over the same period in 2025. This increase was partly due to a front-loading strategy by Brazilian exporters rushing to ship products before the anticipated EU ban. It also followed a four-month (from June to September 2025) EU ban on Brazilian chicken meat due to an HPAI outbreak in Brazil.

Thailand is forecast to be the largest supplier of chicken meat to the EU in 2027 on the assumption that imports from Brazil do not resume. Imports from Thailand primarily consist of cooked chicken meat, as well as processed and salted poultry preparations. The demand for Thai chicken meat is supported by the strong demand within the European hotel, restaurant, and institutional (HRI) sector.

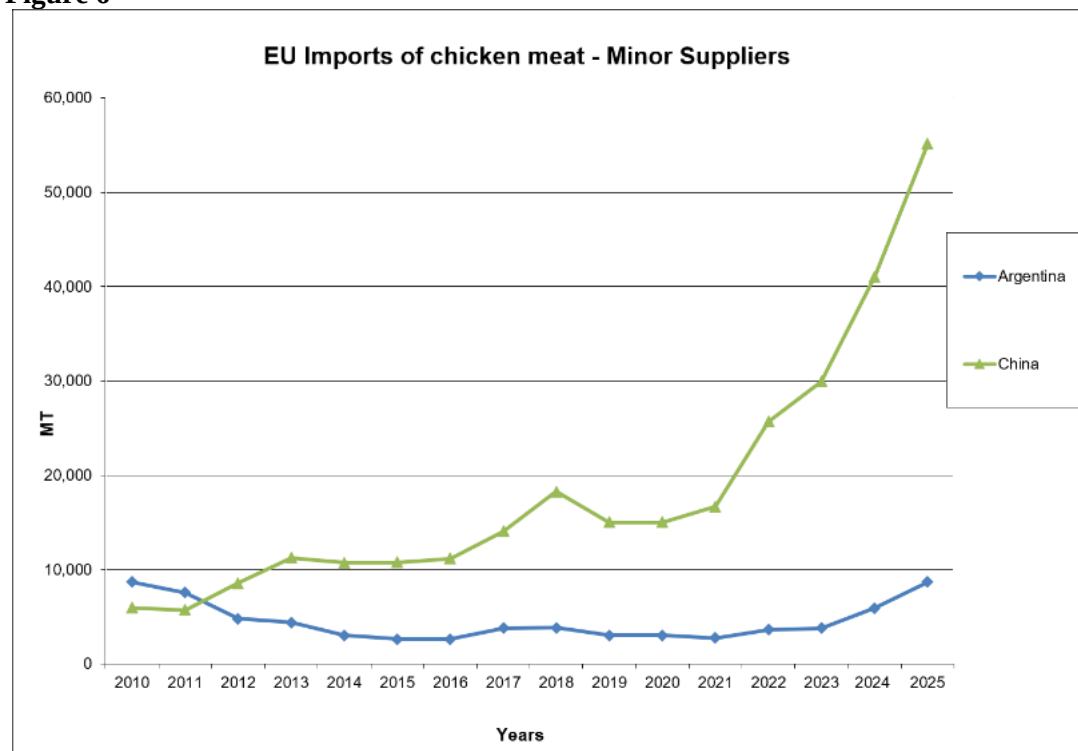
Since Brexit, the UK is considered to be an extra-EU trading partner, and therefore non-EU trade arrangements apply. This includes [prohibiting](#) imports of chilled and frozen minced poultry meat as well as mechanically separated poultry meat. Imports of chicken meat from the UK declined sharply since 2021 as UK exporters face increasing border controls and inspections, and further decline is forecast for 2026. However, a slight increase is expected in 2027, as UK chicken may regain competitiveness should the EU ban on Brazilian chicken meat extend through 2027.

Ukraine is the fourth 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 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.

On October 29, 2025, the revised EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) entered into force ([Regulation \(EU\) 2025/2199](#)), updating 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. As part of the agreement, Ukraine committed to gradually align its agricultural production standards with the EU by 2028.

Consequently, **EU imports of Ukrainian chicken meat are expected to remain stable in 2026 and 2027** compared to previous years.

Figure 6



(Source: Trade Data Monitor)

Argentinian chicken meat exports to the EU have significantly decreased due to rising competition with Brazil but benefited temporarily in 2025 from a currency advantage to slightly regain some market share. With

the stabilization of the Pesos/Euro exchange rate, this advantage is disappearing in 2026, leading to significantly lower Argentina chicken meat exports in the first six months of 2026. On the other hand, **Chinese chicken meat exports to the EU have increased significantly** since 2021. Chinese chicken producers located in Shandong province benefit from the tariff rate quotas on heat-treated chicken meat that were negotiated in 2019. EU imports of China chicken meat could exceed 70,000 MT in 2026.

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 1.8 percent increase in 2026 driven by higher exports to Ghana, Congo, Vietnam, Guinea and Philippines, **EU chicken meat exports are expected to slightly decrease by 1.3 percent in 2027**, as the EU is likely to face increased competition from Brazil as the loss of the EU market forces Brazil to seek alternative markets, including traditional EU markets, for displaced product.

In 2026, several countries, like the Philippines, that have historically imported EU chicken meat, have removed their HPAI restrictions on EU poultry meat. The hike in EU chicken prices combined with a rise in the value of the Euro versus other currencies, including the U.S. Dollar is also negatively impacting the competitiveness of EU chicken meat.

HPAI Affecting EU exports of chicken meat

Table 1

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. However, the Polish poultry industry sees good prospects in the finalization of the HPAI regionalization plan agreed with South Korea (with the extension of the list of approved exporting plants), The opening of the market for heat-treated products in Japan, and the district level regionalization agreement with the Philippines. After approving the health certificate in September 2025, Polish poultry exports to the Philippines rose by 67 percent in the first quarter of 2026. There is also an HPAI regionalization agreement for Polish poultry meat with the People’s Republic of China, but exports of poultry meat and products remain stalled by Chinese administrative procedures.

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

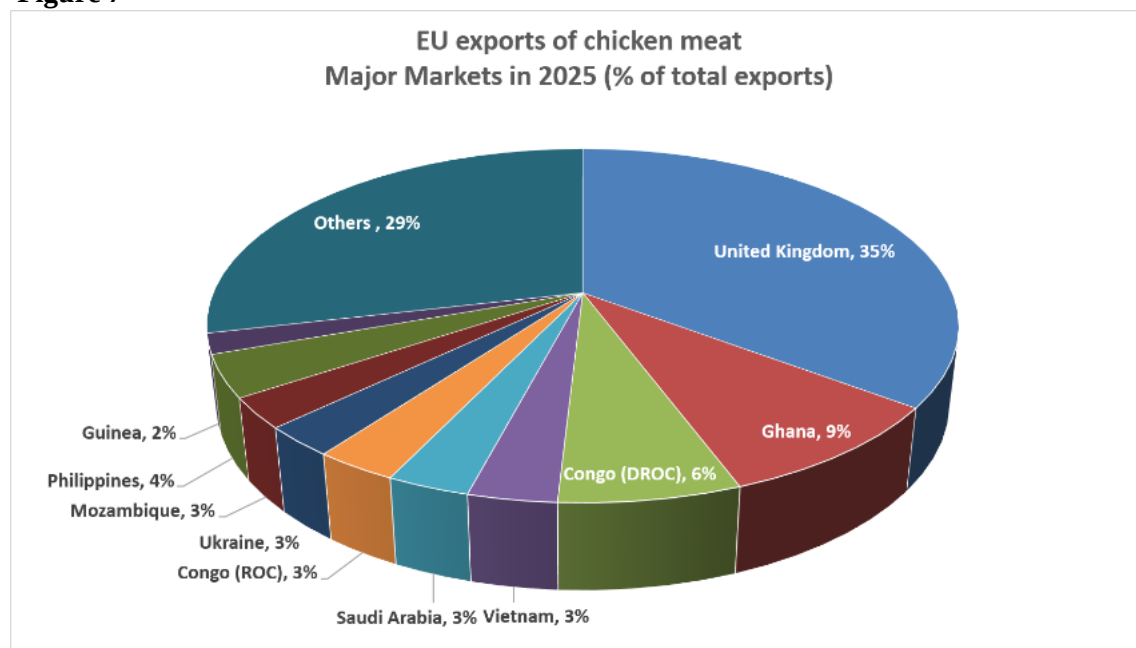
The UK is the largest customer of EU chicken meat. Dark chicken meat cuts are exported to Africa.

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 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, the Philippines and Cuba are also major export markets for low-cost EU frozen chicken cuts.

EU exports of frozen whole chickens to Saudi Arabia are anticipated to decline in 2026 as Brazilian, Ukrainian and Russian chicken meats are more competitive than EU chicken meat on the Saudi market.

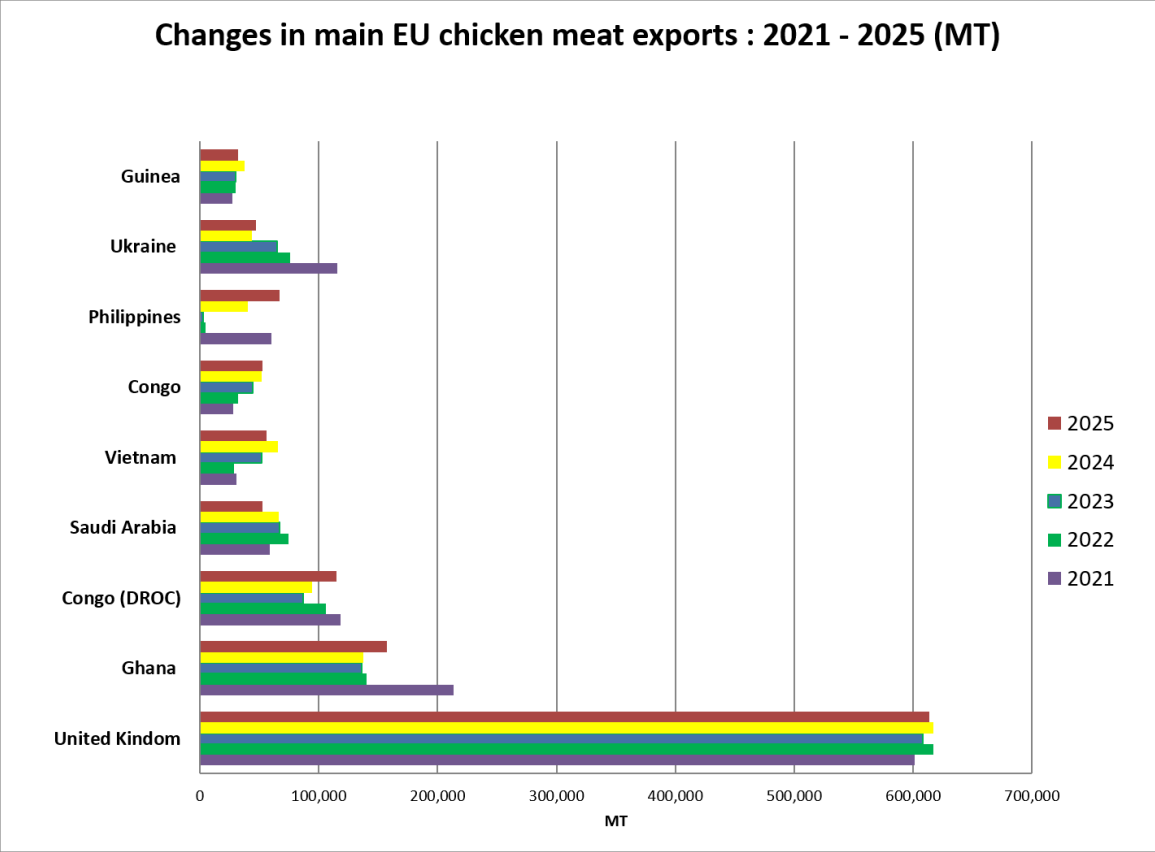
EU domestic consumers prefer breast and premium white meat cuts. Thus, the EU primarily exports dark meat cuts. Despite increasing production costs, EU dark meat remains price-competitive on the international market.

Figure 7



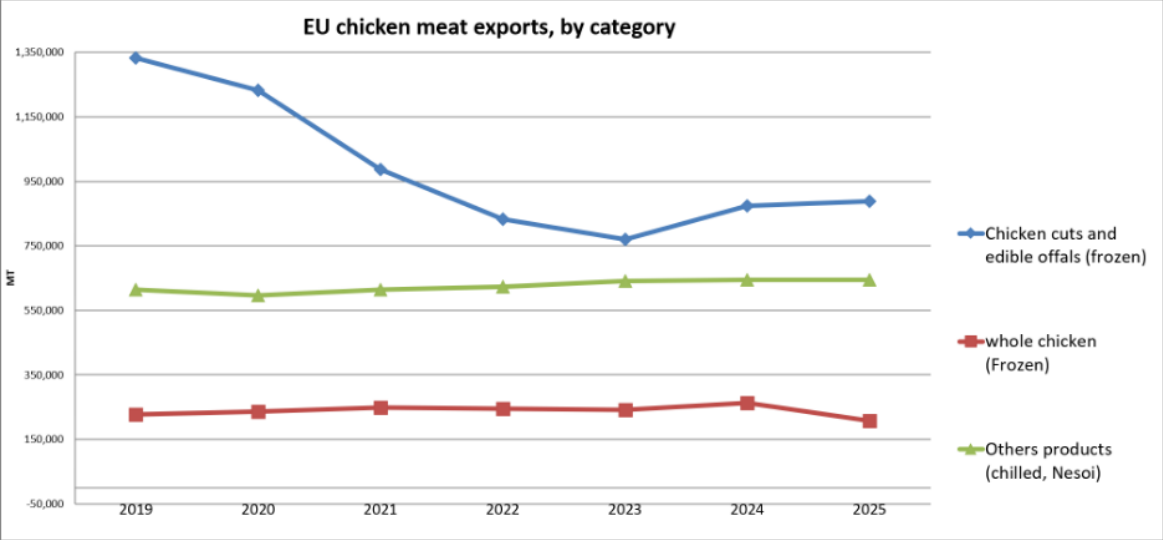
(Source: Trade Data Monitor data)

Figure 8



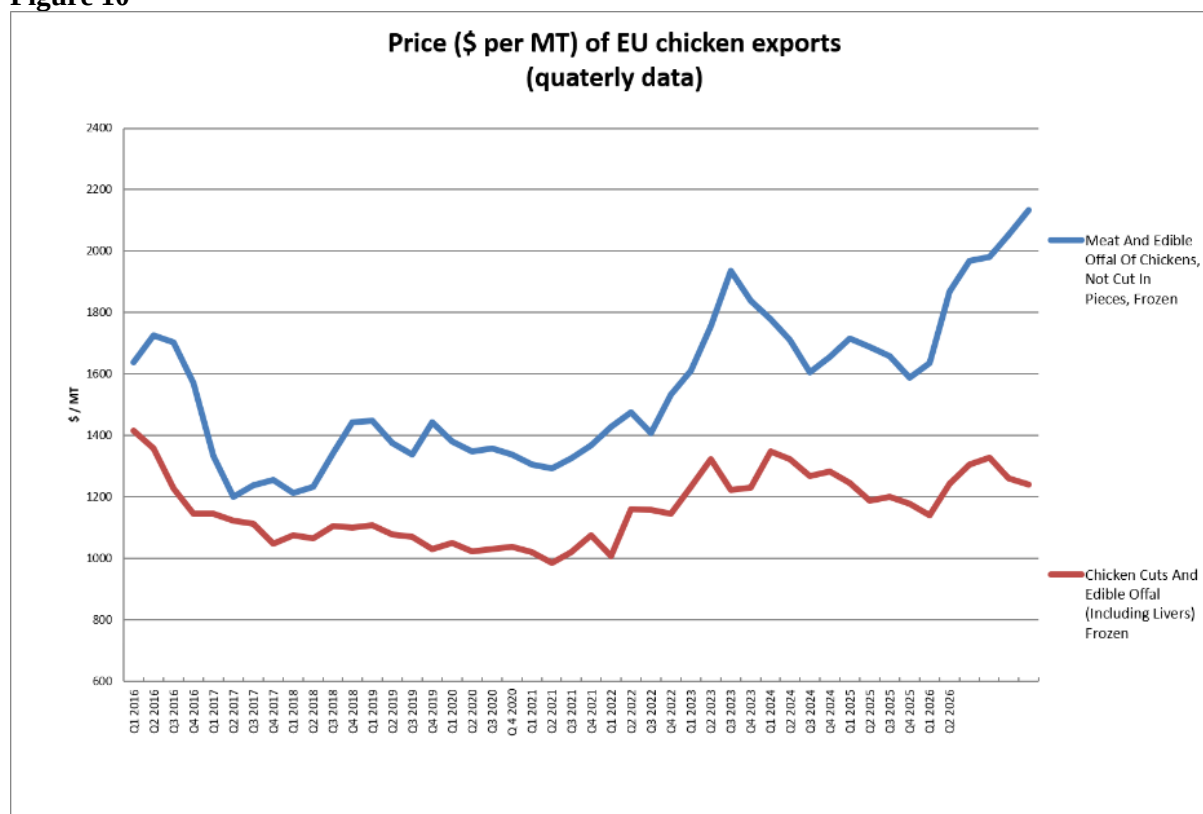
(Source: Trade Data Monitor)

Figure 9



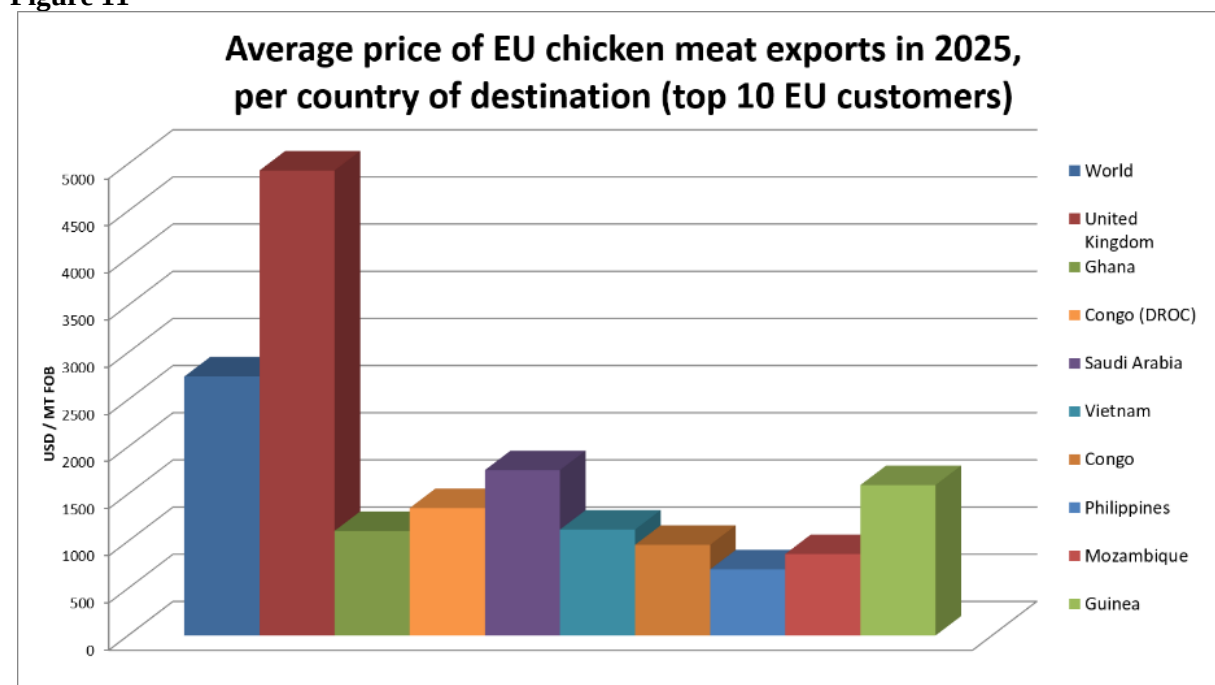
(Source: Trade Data Monitor)

Figure 10



(Source: Trade Data Monitor)

Figure 11



(Source: Trade Data Monitor)

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 recently narrowed in many EU countries. After pork, it is the second largest meat consumed in the EU. EU chicken meat consumption is expected to grow by 1.6 percent in 2027, following a 3.3 percent growth 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 2026 and 2027 will likely continue to benefit by the influx of six 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.

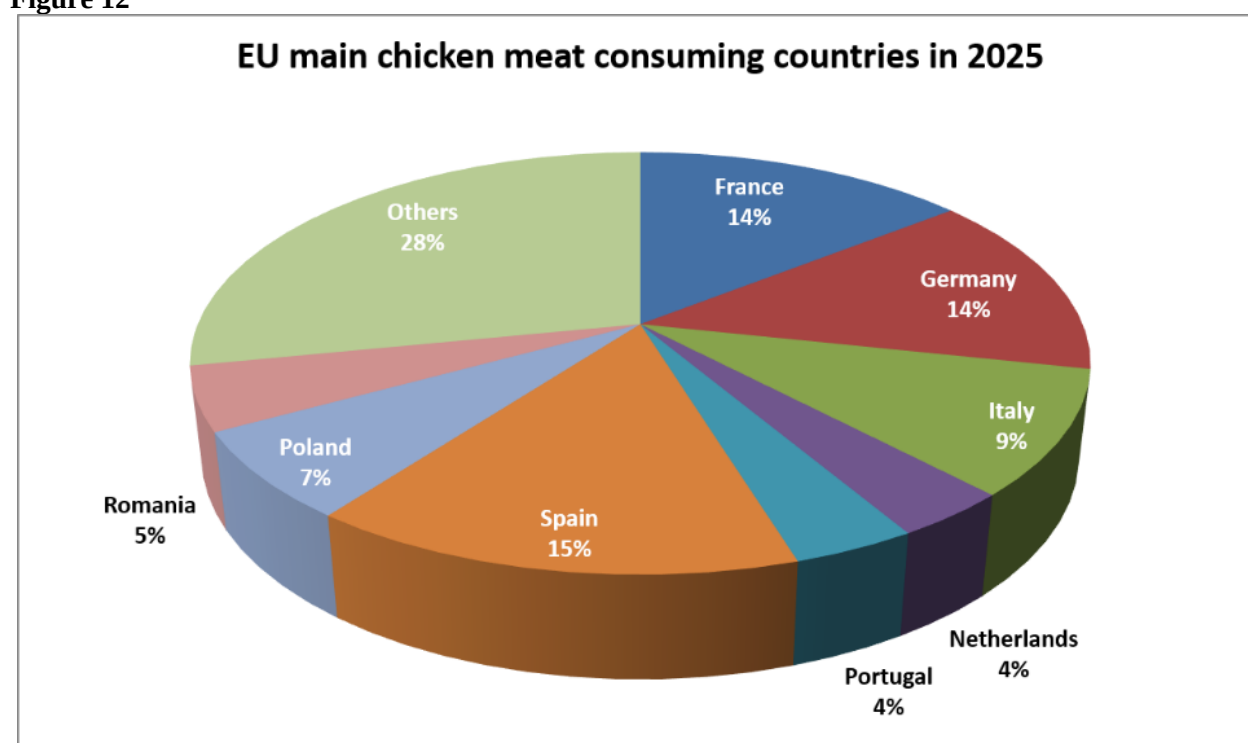
The development of chicken meat fast-food restaurants in Europe

Chicken-based fast-food chains are booming across Europe, driven by rising poultry consumption, affordability, and shifting consumer preferences away from red meat, combined with a preference for quick-service meals among younger generations, and major multi-unit franchise agreements. The expansion of

delivery apps like Uber Eats, Just Eat, and Deliveroo also support the expansion of fast-casual chicken brands via storefronts or ghost kitchens without heavy upfront dine-in real estate.

Major global players like [KFC](#) (which operates more than 2,200 restaurants across Europe and plans to double its European presence over the next five years) and emerging regional chains are rapidly expanding their footprints across France, Belgium, Poland, Germany, and the Netherlands. Over the past five years, chicken fast-food chains have exploded across France. Today, they account for a market worth EUR1.2 billion, an increase of eight percent in just one year. Originally from Louisiana, [Popeyes](#) has opened 25 restaurants in France in barely three years, with more in the pipeline. [Church's Texas](#) Chicken chain announced in 2025 plans for a large international presence targeting 900 new units, with recent franchise deals focusing on Germany, Hungary, and initial footprints planned for the UK, France, Italy, and Spain. [Belchicken](#), an emerging young company, is also expanding its presence, with the goal of more than 300 restaurants across Europe - including France, Germany and the Netherlands - by 2026.

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 is the basis of current and future 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 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. Notably, the proposal simplifies environmental requirements (GAECs, or good agro-environmental conditions) linked to eco-payments for farmers. 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 European Commission unveiled the much-anticipated plan for the next CAP as part of its 2028–2034 EU budget. The proposal marks a major reform, scraping the CAP's two-pillar structure and merging farm funding into broader National and Regional Partnership Plans. The new CAP aims to prioritize performance-based spending, tighter targeting of income support, and greater Member State control. While environmental objectives remain, implementation would shift largely to national discretion. 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. The poultry sector has no coupled income support and limited dedicated market instruments, engaging with the CAP mainly through crisis tools such as compensation for avian influenza outbreaks. Under the next CAP, the former agricultural reserve would be replaced by a strengthened "Unity Safety Net" backed by an EUR 6.3 billion (USD 7.2 billion) fund for market disturbances and emergencies, an instrument of particular relevance to a sector exposed to recurrent disease-related shocks. More information in 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 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 permitting requirements. The updated Directive applies 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, with implications for the poultry sector. Additional information is available on the website of the EC at: <https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/>. The EU concluded negotiations with Australia in March 2026 and with Indonesia in September 2025; in both agreements, poultry is treated as a sensitive product and receives no meaningful new access to the EU market.

Mercosur: On December 6, 2024, the European Commission [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 European Commission had reached a preliminary agreement with Mercosur countries, but amendments were made to several sectors, including agriculture. The agreement includes a bilateral safeguard clause in case increased imports cause - or even threaten to cause - serious injury to relevant sectors, including agricultural sectors. This safeguard clause also covers imports under TRQs in the agreement.

The 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 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 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 a new duty-free poultry TRQ of 180,000 metric tons (carcass weight equivalent) with a 5-year phase in period, split evenly between:

- 90,000 metric tons for boneless poultry meat, including poultry preparations
- 90,000 metric tons for bone-in poultry meat

This quota represents 1.4 percent of total EU consumption and is lower than current imports from Mercosur, which reached 215,000 tons in 2025.

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new Free Trade Agreement. As with Mercosur, the agreement was split into a Modernized Global Agreement (MGA), requiring ratification by all EU Member States and Mexico, and an interim Trade Agreement (iTA) under exclusive EU competence. The iTA is expected to enter into force by the end of 2026. 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.

India: On January 27, 2026, the EU and India concluded negotiations on a free trade agreement, nearly two decades after talks were first launched in 2007. Sensitive European agricultural sectors are fully protected, with poultry, beef, honey, wheat, rice, sugar, and ethanol excluded from liberalization. India likewise excluded poultry, dairy, cereals, and soymeal from market access commitments. The agreement therefore creates no new poultry market access in either direction.

Thailand: Negotiations toward an EU-Thailand FTA remain ongoing and are directly relevant to the poultry sector, as Thailand is a major supplier of processed poultry to the EU. 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 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. 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 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. Calendar year (CY) 2025 TRQs were 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](#).

Table 2: TRQs for Ukraine as of October 29, 2025

Product	Annual Quantity (MT)	Quantity (MT) Jun 6, 2025 to Dec 31, 2025	Period
Poultry meat and poultry meat preparations	93,350 MT + 26,650 MT (for the CN code 0207 12 (10 90))	54,454 MT + 15,545 MT (for the CN code 0207 12 (10 90))	Jan-Dec

EU Tariff Reductions Under US-EU 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 of America 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 Commission 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. Annex I of Regulation 2026/1455 lists the goods which will be subject to zero tariffs. No poultry products are included in the scope of Regulation 2026/1455.

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

Veterinary Medicinal Products Regulation (VMP Regulation)

On January 28, 2022, the EU implemented the 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, and
- 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.

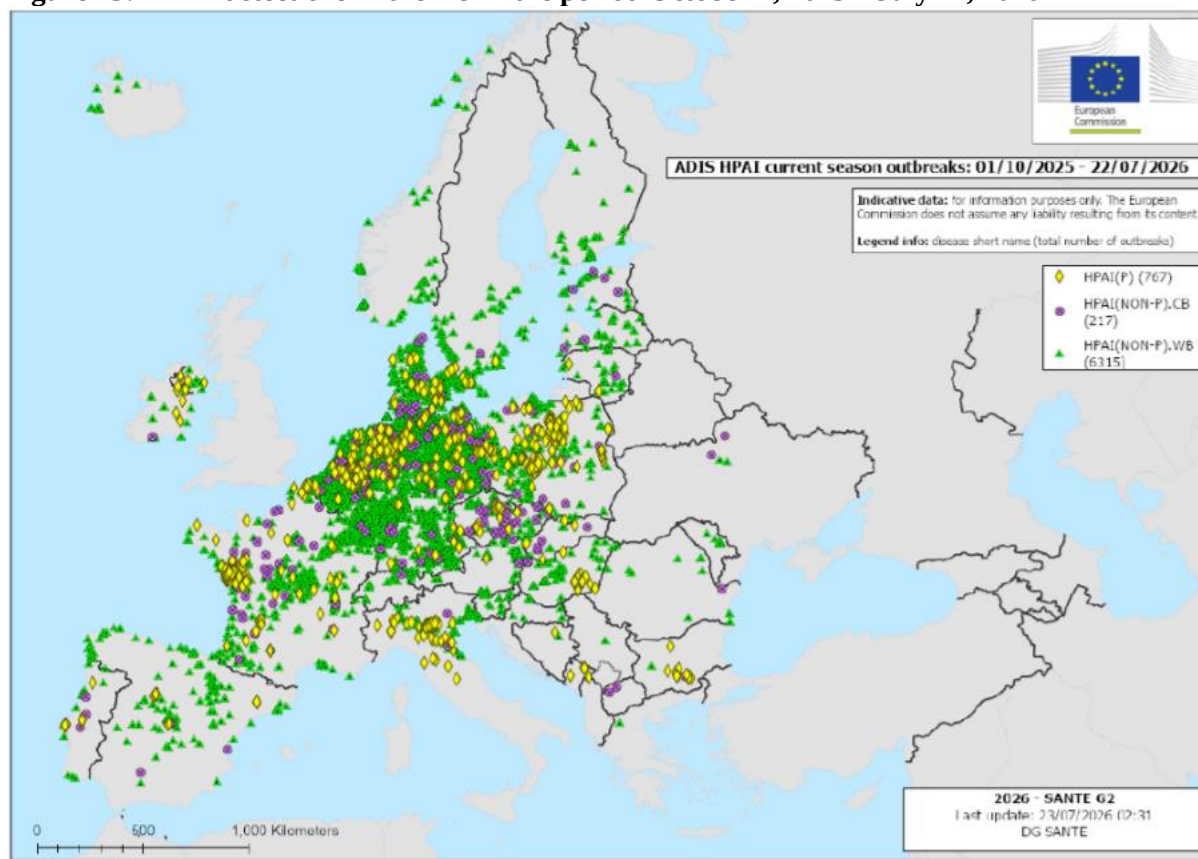
On February 12, 2024, [Commission Implementing Regulation \(EU\) 2024/399](#) was published in the Official Journal amending model certificates for the entry into the Union of consignments of certain products of animal origin and certain categories of animals. The new models will be implemented by the 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 was implemented on September 3, 2026.

Highly Pathogenic Avian Influenza (HPAI) Situation Update

HPAI activity in Europe remained significant throughout the 2025–2026 epidemic season, with 949 HPAI A(H5) virus detections reported in domestic (186) and wild (763) birds across 30 countries between February 28 and June 4, 2026. Compared to the same period last year, the number of detections in domestic birds was similar, while the number of detections in wild birds in the 2025–2026 epidemiological year was at least three times higher, due to the very high circulation of HPAI virus in waterfowl.

Figure 13: HPAI detections in the EU in the period October 1, 2025 – July 22, 2026



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

France is continuing and expanding its preventive vaccination strategy for domestic ducks (started in the 2023 season). The government continues to report sporadic HPAI outbreaks in vaccinated ducks, though to a lesser extent than in the previous two reporting periods, suggesting the vaccination campaign continues to reduce, though not eliminate, outbreak risk.

The Netherlands remains another EU Member State pursuing vaccination against avian influenza. The program launched by the Ministry of Agriculture, Fisheries, Food Security and Nature (LVVN) in 2025 is understood to continue into early 2027. Eggs from these vaccinated hens are sold only within the Netherlands.

Attachments:

No Attachments