USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** May 13, 2025

Report Number: PL2025-0007

Report Name: Animal Diseases Shake Polish Poultry Industry

Country: Poland

Post: Warsaw

Report Category: Agricultural Situation, Pest/Disease Occurrences, Poultry and Products

Prepared By: Anna Galica

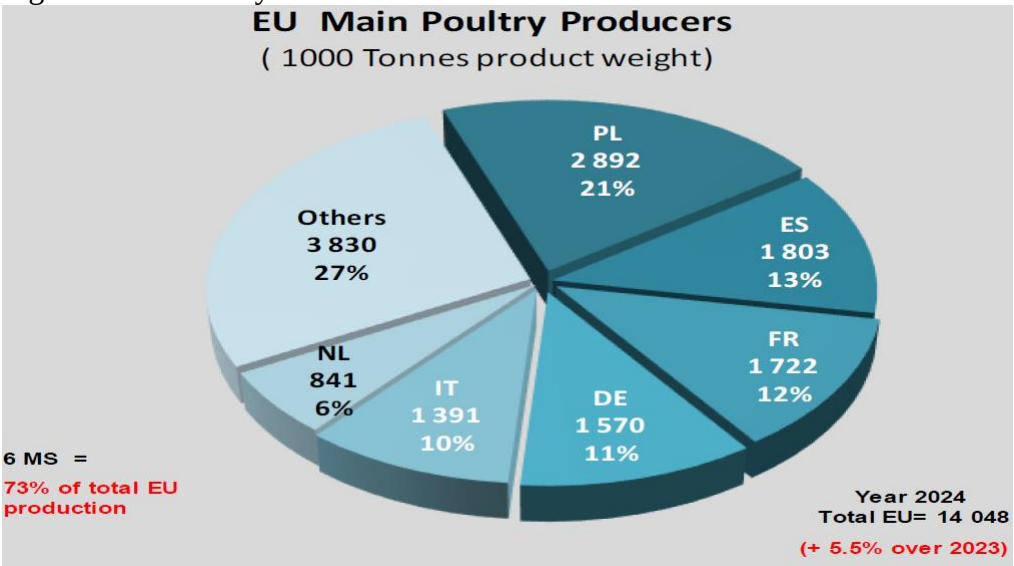
Approved By: Levin Flake

Report Highlights:

Poland is the largest EU poultry meat producer, accounting for 21 percent of total EU production. Despite expectations for rising poultry production in 2025 due to growing demand and lower production costs, the spread of animal diseases throughout the country in March and April 2025 have begun to weigh on Polish production. Highly pathogenic avian influenza infections have continued on large poultry farms leading to the introduction of additional biosecurity measures agreed with the EU. Moreover, expanding Newcastle disease (ND) infections invoked regulatory actions including mandatory ND vaccination.

Poland is the largest EU poultry meat producer, accounting for 21 percent of EU production, with 2024 Polish production amounting to 2.9 million metric tons (MT). According to the latest data available, chickens account for 89 percent of Polish poultry population (of which 25 percent are laying hens and 75 percent are broilers), turkeys account for seven percent, ducks for three percent, and geese for one percent.

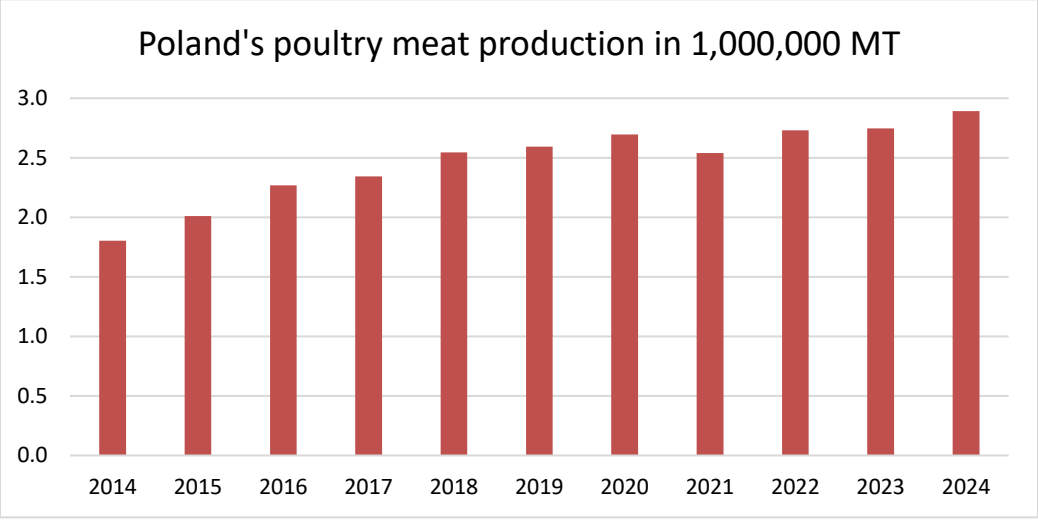
Figure 1. EU Poultry Meat Production in 2024



PL – Poland, ES – Spain, FR – France, DE – Germany, IT – Italy, NL – the Netherlands
Source: European Commission

Polish poultry production has seen rapid development since 2004, when Poland joined the European Union, supported by growing domestic consumption and export demand.

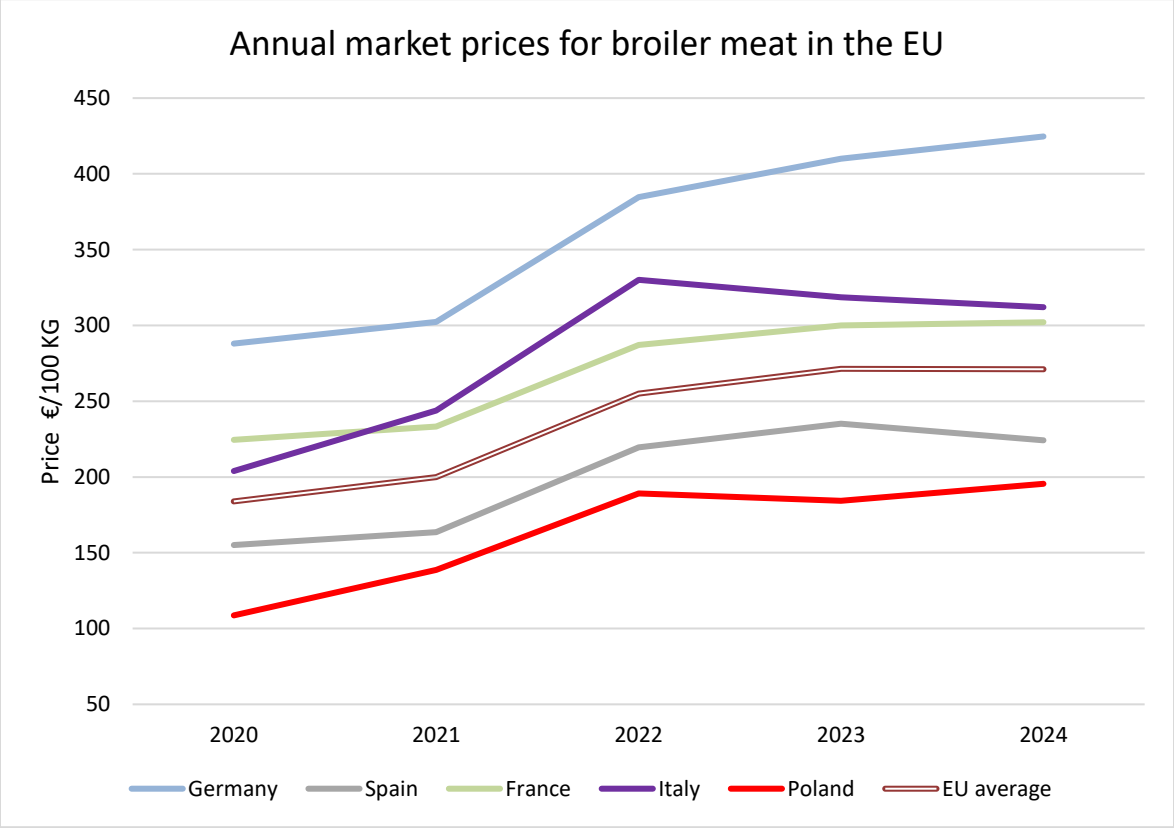
Figure 2. Poland's Production of Poultry Meat (Chicken, Turkey, Duck, Geese) in 2014-2024



Source: EUROSTAT

Poultry meat is perceived in Poland as healthier, cheaper, and easier to cook, which persuaded Poles to increase poultry meat consumption, even despite the fact that pork remains the most consumed type of meat in Poland. Outside the country, Polish producers have been able to offer broiler meat cheaper than the other EU competitors, which resulted in growing demand for Polish production. Currently the EU accounts for around 60 percent of Polish broiler meat exports, with 40 percent directed to non-EU countries.

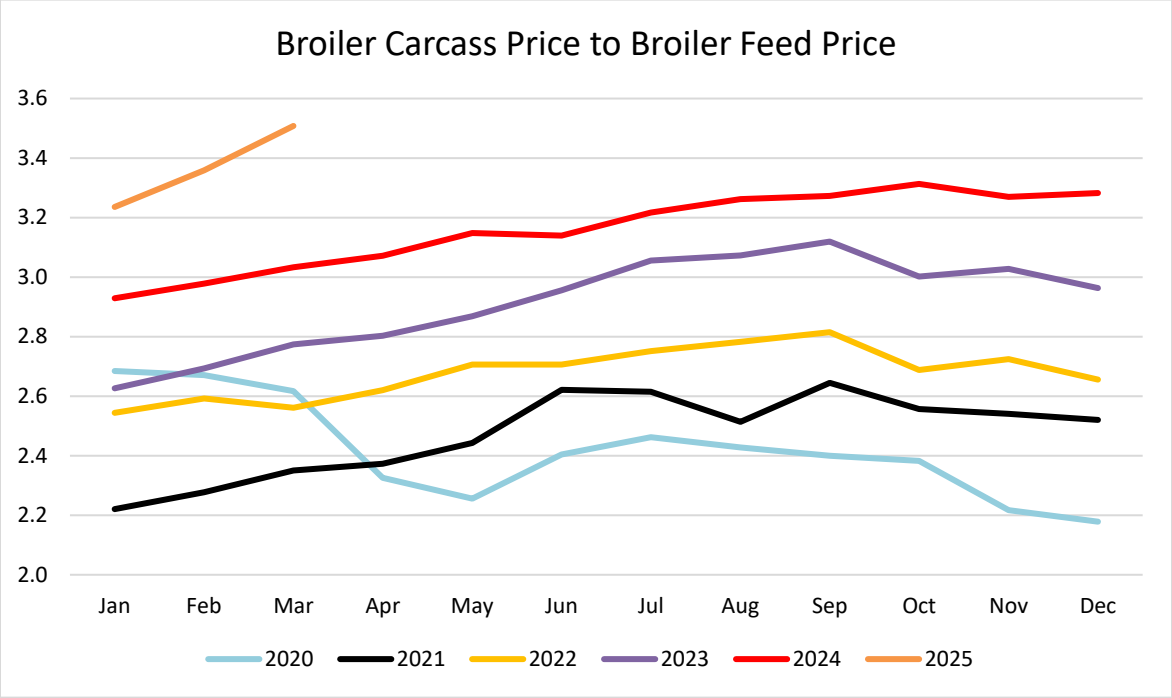
Figure 2. Average Annual EU Broiler Meat Prices in the EU by Major Producers



Source: FAS Warsaw based on data from the European Commission

The profitability of poultry production is determined by broiler slaughter prices and input costs. According to the industry, feed costs account for around 70 percent of all production costs. In 2024 the average prices for broilers for slaughter started to grow and simultaneously the price for 1,000 kg of broiler feed was declining, favoring better margins of poultry producers.

Figure 3. Monthly Relation of the Price for 1,000 kg of Broiler for Slaughter to 1,000 kg of Broiler Feed



Source: FAS Warsaw based on data from the Polish Ministry of Agriculture and Rural Development and Polish Central Statistical Office

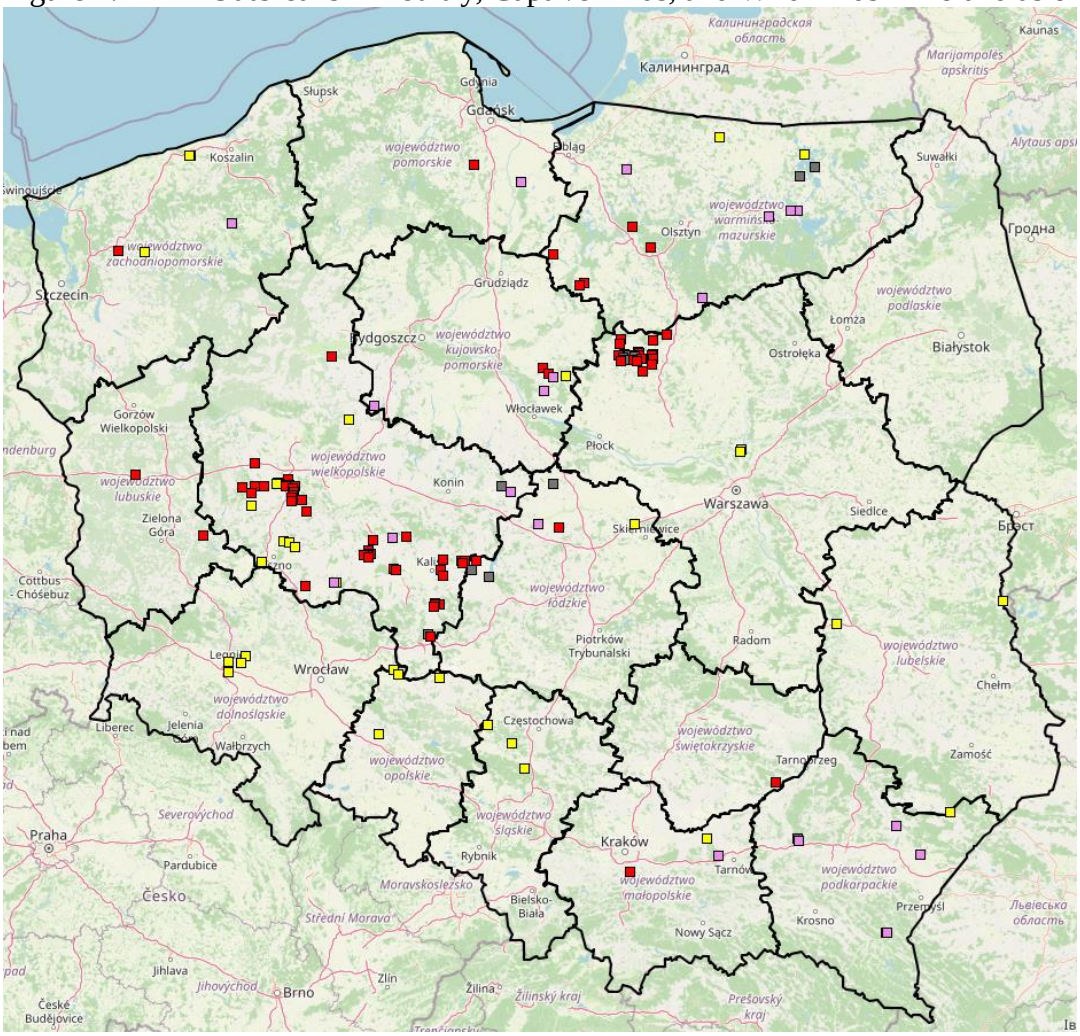
Increasing production resulted in a chicken slaughter increase of 6.5 percent in 2024. This trend continued at the beginning of 2025, however the spread of highly pathogenic avian influenza (HPAI) and Newcastle disease (ND) in Poland has started to negatively weigh on poultry production.

Highly Pathogenic Avian Influenza (HPAI)

In 2025, as of May 6, Poland has reported 85 HPAI outbreaks in poultry, with the last one reported on May 2, 2025. In 2024, 50 HPAI outbreaks in farmed poultry were confirmed.

The 85 HPAI outbreaks were detected in commercial poultry farms located in 11 Polish provinces. The majority of outbreaks (43) were detected in the western Wielkopolskie province, followed by the central Mazowieckie (21), and northern Warmińsko-mazurskie (7) provinces. Mazowieckie and Wielkopolskie provinces are the ones with the largest poultry population in Poland, accounting for 22 and 23 percent, respectively.

Figure 4. HPAI Outbreaks in Poultry, Captive Birds, and Wild Birds in Poland as of May 6, 2025

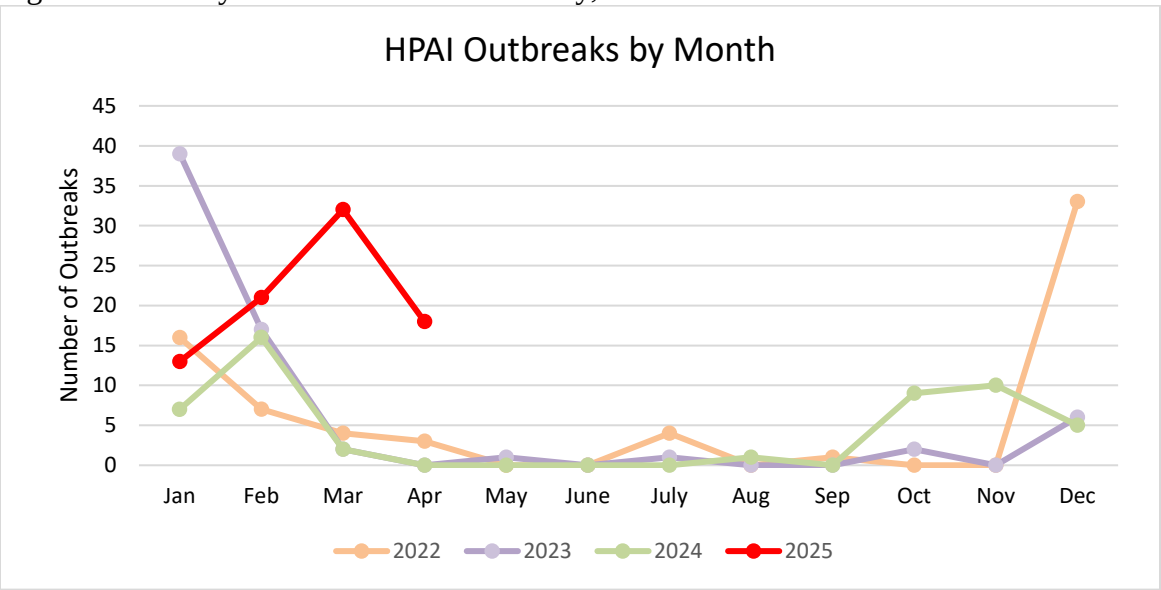


Red square – 2025 HPAI outbreaks in poultry
Purple square – 2025 HPAI outbreaks in captive birds
Yellow square – 2025 HPAI outbreaks in wild birds
Source: General Veterinary Inspectorate

The 2025 outbreaks have led to the culling of 7.7 million birds on the infected farms and an additional 4 million poultry in 65 contact farms. Despite the fact that most HPAI outbreaks were reported on slaughter turkey farms (29 farms), egg production was the most impacted by the disease, as 48 percent of all culled birds were laying hens. Moreover, five outbreaks were confirmed on broiler farms, with 1.2 million birds culled, and 12 outbreaks on hen reproductive farms, where over 865,000 birds were culled. Such a loss of reproductive hens poses a threat to Polish potential to rebuild poultry stocks.

In previous years HPAI outbreaks followed a seasonal pattern, with infections increasing in the winter months - when the virus circulation was facilitated by migratory birds - and HPAI detections decreasing in spring and summer. In 2025, the winter infection peak has been prolonged with the highest HPAI outbreak numbers recorded in March.

Figure 5. Monthly HPAI Outbreaks in Poultry, 2022-2025



Source: FAS Warsaw based on General Veterinary Inspectorate's data

In March and April HPAI infections were spreading in large commercial farms. As a result, at the beginning of April 2025, the European Commission (EC) informed the Polish Chief Veterinary Officer (CVO) that the assessment of the epizootic situation in relation to HPAI in Poland raises deep concern. In the EC's opinion, the measures taken by the Polish side to limit the occurrence of HPAI infections in poultry were insufficient, which threatened the epizootic safety on the intra-EU market.

In connection with the above, the EC planned to launch the procedure under Article 259 of Regulation (EU) 2016/429 of the European Parliament and of the Council, i.e. the adoption of extraordinary measures against Poland in connection with the serious risk of the spread of the disease. The extraordinary measures presented by the EC would initially concern a ban on the introducing new birds to the commercial farms in the following provinces: Wielkopolskie, Łódzkie, Kujawsko-Pomorskie, Mazowieckie and Warmińsko-Mazurskie, as well as restrictions on the movement of poultry, except for the movement to slaughterhouses. These provinces make up 64 percent of Poland's poultry production.

As a result of negotiations, on April 15, 2025, an action plan was developed, in cooperation with representatives of the leading poultry industry associations and poultry and egg producers. Thirteen key directions were jointly agreed upon, which were presented to the EC as an alternative to the planned decisions to introduce extraordinary measures.

The actions that are subject to immediate implementation by poultry producers and breeders and the Veterinary Inspection, are as follows:

1. Extending the time between poultry placements to 14 days combined with additional official disinfection control.
2. Increasing the surveillance zone in the event of confirmation of an outbreak by an additional 5 km.
3. Control of verified biosecurity plans by veterinarians, with particular emphasis on the current epizootic situation at the county level, signed by the veterinarian managing the flock. Cases of an

outbreak and the occurrence of inconsistency of the factual state with the biosecurity plan will result in no compensation being awarded.

4. Introduction of weekly monitoring in restricted areas - bird health status and sampling in cooperation with the veterinarian managing the flock and the district veterinarian (DVO).
5. Adjustment of the stocking density of facilities by imposing a maximum stocking density defined by the DVO for each farm where new bird introduction is planned in the coming weeks; prohibition of issuing derogations for increasing the stocking density;
6. Farms where outbreaks occurred - minimum break in production 40 days from final disinfection, admission to production after DVO inspection, verification of cleanliness tests confirming the absence of HPAI and ND viruses; introduction of indicator animals and keeping only indicator animals for 21 days;
7. Catching teams during loading - in surveillance zones, extended by 5 km, creation by the farms of schedules and zones/areas of activity/work of specific groups of people by indicating them (as an element of biosecurity) - the principle of "the entire hen house full - the entire hen house empty".
8. Assignment of employees to individual farms - employees dedicated to only one farm with a ban on work, and even incidental movement to other facilities (a list of personnel with declarations of no contact with poultry and wild birds living outside the workplace, and having knowledge of the ban on contact with poultry and wild bird carcasses for 72 hours before starting work).
9. Poultry Hatcheries - sending the schedule of transports of eggs and one-day-old chicks at least 72 hours in advance to the DVO competent for the place of business and to the DVO competent for the place of destination.
10. A ban on organizing exhibitions, fairs, shows and other gatherings of birds in the provinces where HPAI outbreaks have not been extinguished during the period of restrictions.
11. Notification of transports - sending the schedule of transports of eggs and day-old chicks at least 72 hours in advance to the DVO competent for the place of business and to the DVO competent for the place of destination; the DVO of destination introduces a ban on placing chicks if the result of the biosecurity check is unsatisfactory.
12. Requirement to disinfect vehicles delivering feed/receiving animal by-products each time before entering the farm (to be included in biosecurity plans);
13. Issuance by the DVO of a regulation pursuant to Art. 45 sec. 1 point 4 and 11 of the Act on the Protection of Animal Health and Combating Infectious Animal Diseases from the moment of HPAI suspicion until the results of the test are obtained, by which the DVO will prohibit the re-stocking of farms within a 3 km area (after obtaining the result - respectively - the territorial extension of the ban or repeal of the regulation)

On April 15-16, 2025, further meetings between the CVO and the EC were held, at which the EC adopted the proposed alternative actions and it was agreed that the above measures will apply only in three clusters, referred to as Further Restricted Zones (FRZ):

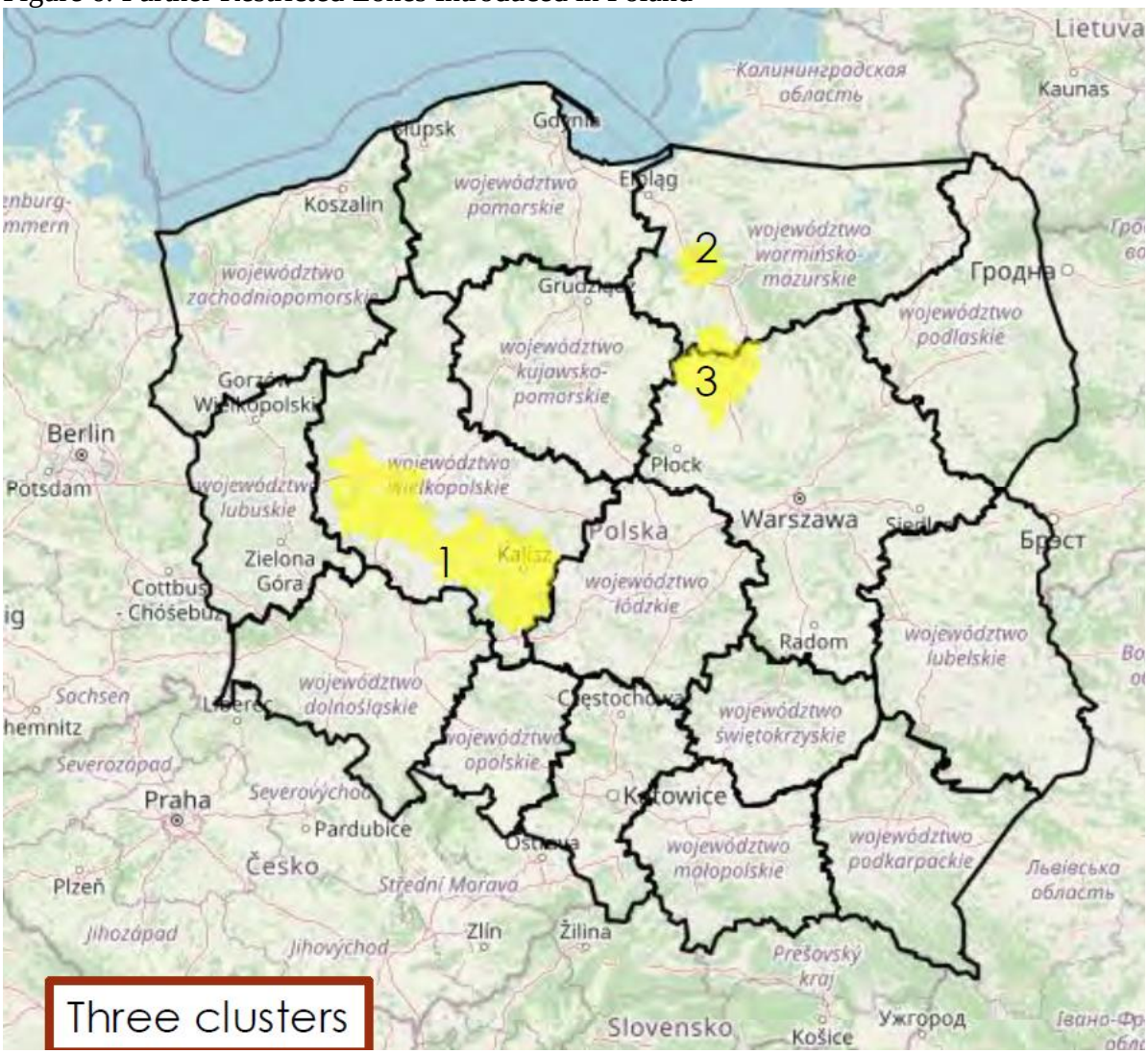
(1) Wielkopolska covering the entire counties of Grodzisk, Kościan, Kalisz, Jarocin and parts of the counties of Krotoszyn, Nowy Tomyśl, Szamotuły, Wolsztyn, Poznań, Śrem, Gostyń, Pleszew, Ostrów and Ostrzeszów within the administrative boundaries of the communes, where restrictions appropriate for infected and at risk areas, designated in connection with HPAI outbreaks, are currently in force.
(2) Warmia and Mazury, covering the area of administrative territories of communes where restrictions appropriate for infected and endangered areas are currently in force, designated in

connection with outbreak no. 64/2025 in Ostróda and Olsztyn districts and part of communes in Działdowo district - as part of the Masovian cluster.

(3) Masovian, covering the Żuromin district, part of the Mława and Płońsk districts, where restrictions appropriate for areas are currently in force infected and at risk, designated in connection with HPAI outbreaks.

The updated scope of the FRZ was specified in Commission Implementing Decision (EU) 2025/858 of 29 April 2025 amending the Annex to Implementing Decision (EU) 2023/2447 concerning emergency measures in relation to outbreaks of HPAI in certain Member States.

Figure 6. Further Restricted Zones Introduced in Poland



Source: European Commission

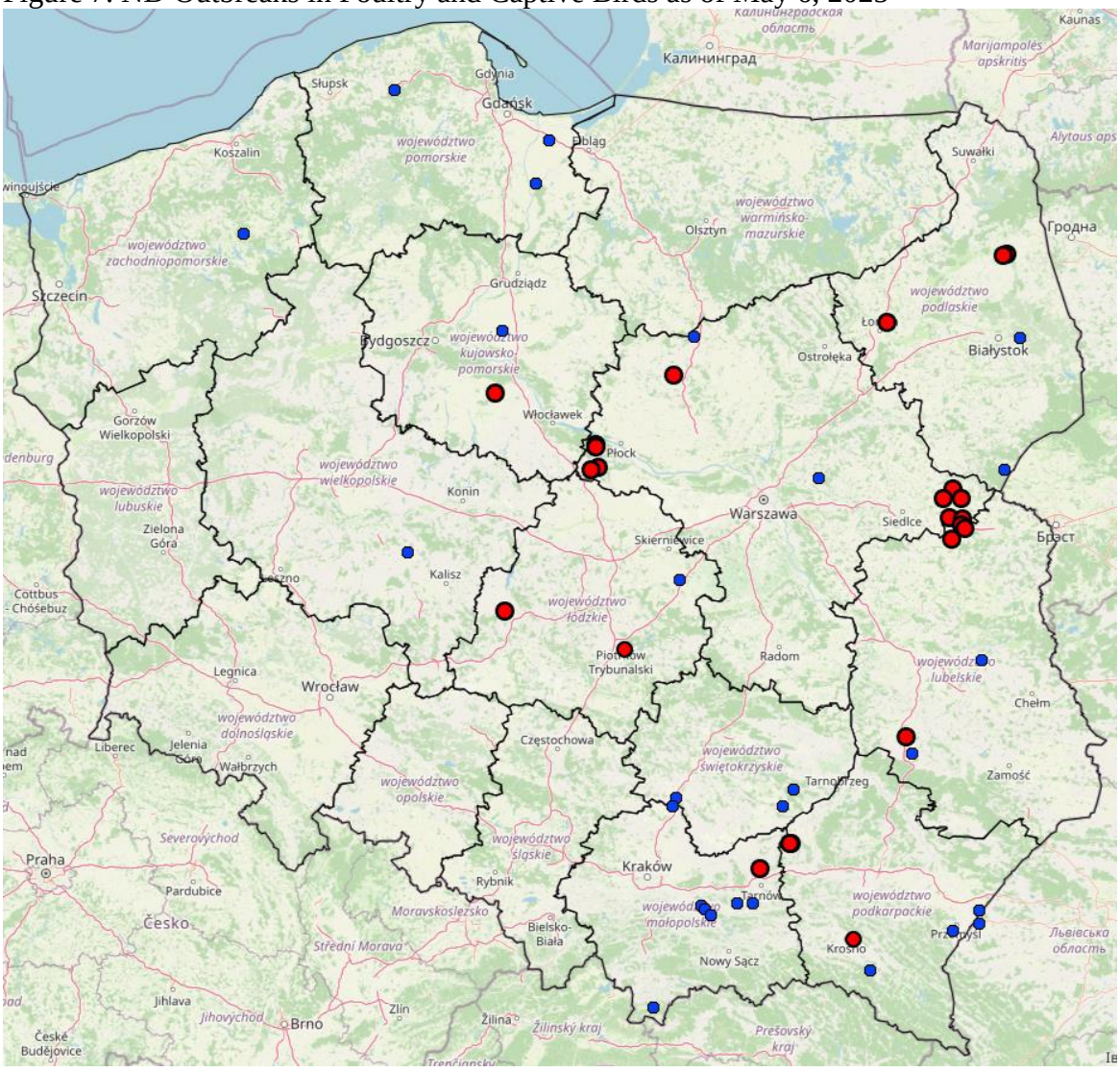
The measures agreed with the EC were implemented immediately in Poland by the Provision of the CVO issued on April 15, 2025, published on April 18, 2025. They will continue to apply until 30 days have passed since the last outbreak in the cluster.

Newcastle Disease (ND)

In 2025, as of May 6, Poland reported 24 outbreaks of Newcastle disease (ND) on commercial poultry farms, with the last one confirmed on April 29, 2025. ND was reported on 20 farms keeping broilers, three farms with mixed poultry species, and one farm with turkey production, leading to culling of over two million birds. In 2024, 21 ND outbreaks were confirmed.

Additionally, in 2025, as of May 6, Poland reported 27 ND outbreaks in captive birds (backyard farms) in 12 Polish regions, mostly in central and eastern Poland.

Figure 7. ND Outbreaks in Poultry and Captive Birds as of May 6, 2025



Red dot – ND outbreaks in poultry
Blue dot – ND outbreaks in captive birds
Source: General Veterinary Inspectorate

For eradication of ND, only local provisions on increased biosecurity or vaccination requirements applied. However, on April 25, 2025, the Minister of Agriculture and Rural Development signed a

regulation on the measures taken in connection with the occurrence of Newcastle disease. This is a measure aimed at increasing requirements and strengthening biosecurity by poultry producers, which was created in consultation with the poultry industry. The regulation introduces biosecurity requirements and the obligation to vaccinate chickens and turkeys kept on commercial farms and poultry hatcheries.

The most important principles introduced by the above regulation are as follows:

- Basic biosecurity measures apply (as in the case of HPAI) to all poultry farmers and will be adapted to the level of risk posed by commercial and non-commercial farms;
- Commercial farms are obliged to: apply enhanced biosecurity measures, which translates into the need for, among others, equipping the farm with disinfecting mats or basins (or other technical solutions) before entering and leaving buildings with poultry and before entering and leaving farms; applying biosecurity and personal protection measures; cleaning and disinfecting equipment and tools used to keep poultry;
- Farm owners are obliged to keep and store documentation on disinfectants, rodent control and disinfection, and poultry mortality, and to keep a register of means of transport for transporting poultry, eggs, feed, or animal by-products entering the farm. Also all people entering premises where poultry is kept must be registered;
- Farms must be equipped with a container for keeping carcasses of dead poultry, alternatively a room must be designated for keeping dead poultry;
- Farms must be equipped with disinfectants enabling ongoing, continuous disinfection for at least seven days, and the owners of these farms are required to maintain cleanliness and order around buildings where poultry, feed and bedding are kept; on farms, places should be designated for storing disinfectants (along with securing these places against access by unauthorized persons), storing manure, feed, and litter;
- On commercial farms where hens are kept operating in an infected area, an order is introduced to apply the principle of "all-in, all-out", which means that the entire hen house is emptied at one time;
- An obligation to vaccinate against ND will apply to chickens and turkeys kept on commercial farms (regardless of the number of poultry kept) and poultry hatcheries (before leaving the establishment). On commercial farms where up to 350 poultry are kept on average per year, such vaccinations will be carried out in accordance with the characteristics of the veterinary medicinal product; on farms with larger scale of production - on the basis of a vaccination program, which is an element of the mandatory biosecurity plan; the regulation also establishes a ban on introducing to and removing from farms (both commercial and non-commercial) chickens and turkeys not vaccinated against ND and a ban on introducing hatching eggs from unvaccinated hens and turkeys to poultry hatcheries;
- The vaccination obligation has been strengthened by ordering laboratory testing of the level of antibodies protecting chickens and turkeys against ND in order to assess the effectiveness of the vaccination program, together with the possibility of verification by DVO, who will also be authorized to issue recommendations regarding modification of such a program.

The provisions on biosecurity and the principles of stocking henhouses in the infected area covered by the above regulation entered into force on April 29, 2025, while the provisions on the vaccination requirement will enter into force on May 13, 2025.

The Polish Minister of Agriculture has stated that the new requirements might be a burden for producers, but in his opinion, they will translate into “fewer disease outbreaks in flocks and better meat quality". They would also ensure that all farms meet food safety standards and will allow Poland to maintain the large scale of exports and poultry meat consumption. The Polish poultry industry expects that these could limit further disease outbreaks and help ensure continued production growth once the HPAI restrictions are lifted.

Attachments:

No Attachments.