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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 2 percent in CY 2025. In 2025, 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 2025 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	2023		2024		2025	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
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)	11084	11040	11385	11490	11530	11750
Total Imports (1000 MT)	722	723	720	729	700	700
Total Supply (1000 MT)	11806	11763	12105	12219	12230	12450
Total Exports (1000 MT)	1649	1653	1780	1768	1810	1800
Human Consumption (1000 MT)	10157	10110	10325	10451	10420	10650
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	10157	10110	10325	10451	10420	10650
Total Use (1000 MT)	11806	11763	12105	12219	12230	12450
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	11806	11763	12105	12219	12230	12450
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

European Union (EU) chicken meat production in calendar year (CY) 2025 is forecast to grow by more than 2 percent after a 4.1 percent growth in CY 2024. Significantly fewer Highly Pathogenic Avian Influenza (HPAI) outbreaks in major EU producing countries and the lower competition from Ukrainian chicken exports to the EU helped support the production growth which also benefited from the strong dynamism of the domestic demand. Chicken meat production also benefited from lower energy and feed prices in 2024 supporting producers' income, particularly in Poland, the leading EU producer.

In several countries such as the Netherlands and Belgium, environmental constraints such as the reduction on nitrogen emissions are slowing down production expansion. After years of decline, French chicken meat production increased sharply in CY 2024, fueled by a strong consumer demand which can be partly attributed to the large foreign attendance during the 2024 Paris Olympic games.

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 see Policy section).

In Poland, an increasing number of Newcastle Disease (ND) cases have been reported. As of 31 December 2024, Poland reported 29 outbreaks of ND in non-commercial flocks of poultry, and 12 ND outbreaks in commercial poultry farms, leading to the culling of almost 2.2 million broilers and some bans in trading partners limited to the impacted regions and not applicable to heat-treated products.

Consumption

EU domestic consumption of chicken meat is expected to increase by 2 percent in CY 2025 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

EU chicken meat imports increased 1 percent in CY 2024 but are expected to decline by 3 percent in CY 2025 as a consequence of smaller imports from Ukraine. The European HRI sector accounts for the largest share of imported chicken. Imports from United Kingdom (now the largest chicken meat supplier to the EU) grew 8 percent but remained well below their pre-Brexit levels due to the strict sanitary controls imposed by the EU.

At 133,500 MT, EU imports of Ukrainian chicken meat declined by more than 36 percent in CY 2024 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 de facto limiting Ukrainian chicken meat exports to the EU. According to market analysts, the European Commission does not intend to extend its regulation on the abolition of customs duties on Ukraine’s agricultural products (ATM - Autonomous Trade Measures), set to expire on June 5, 2025. Instead, the DCFTA (Deep and Comprehensive Free Trade Agreement) would be reinstated, with limited import quotas.

Imports from Thailand and Brazil benefited from the lower competition from Ukraine and grew by 7 percent. Imports of chicken meat (mostly cooked chicken meat and chicken offals) from China grew by 36 percent in 2024 to above 40,000 MT, most of it going to the Asian style HRI sector.

In CY 2024, EU chicken meat exports grew by 7 percent driven by 26 percent increase in EU chicken meat exports to Vietnam (66,000 MT), an 8 percent increase to the Democratic Republic of Congo (94,000 MT) as well as a whopping 25-time increase in exports to Philippines (40,500 MT) as HPAI related bans were lifted. Overall, the stabilization of production costs in the EU in CY 2024 increased EU chicken meat export competitiveness in African markets.

On the other hand, EU chicken meat export to Ukraine continued to decline to 44,000 MT as the war continues to disrupt trade flows and the price-competitive domestic production competes with EU-sourced chicken cuts. This is notably the case for mechanically separated meat (MSM) which used to be exported from Poland to Ukraine but is now produced and consumed locally while high value cuts are exported to the EU.

The UK remained the largest market for EU chicken meat (up 1 percent), driven by strong Polish and German chicken meat exports and despite strong competition from Thai, Brazilian, Chinese and Ukrainian chicken meat.

South Africa, which used to be a major customer of EU chicken (up to 122,000 MT in CY 2019) imported less than 2,300 MT in CY 2022 and imported close to 27,000 MT in CY 2024, following the lifting of some HPAI restrictions.

Even if fewer cases are reported, continuing HPAI outbreaks in 2025 may continue to impact EU chicken meat exports combined with competition from cheap Ukrainian chicken meat. 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 moderately from CY 2024 levels in the year ahead.

Policy

Deforestation-free supply chains

On December 23, 2024, the European Union published Regulation 2024/3234 amending the EU Deforestation Regulation (EUDR - Regulation 2023/1115) in the Official Journal. For more information about the EUDR, please see European Institutions Finalize Deforestation-Free Supply Chain Regulation.

This amendment postpones the date of application of the EUDR by one year to December 30, 2025, for most operators and June 30, 2026, for small and medium sized operators. The amendment also stipulates that the benchmarking of countries should be published by June 30, 2025. For more information about the postponement, please see EU Deforestation Regulation - Revised Implementation Timeline for 2025.

Increased Tariffs on Russian and Belarusian Goods

On May 30, 2024, the European Union adopted Council Regulation (EU) 2024/1652 which increases the tariffs on imports into the EU of grains, oilseeds and preparations used in feed and other products from Russia and Belarus. These measures concern products originating in or exported directly or indirectly from Russia and Belarus to the EU. They do not affect transit through the EU from both countries to other third countries. These measures entered into force on July 1, 2024.

On January 28, 2025, the European Commission proposed to increase tariffs by an additional 50 percent on top of the common rate for imports of certain goods originating in or exported directly or indirectly from Russia and Belarus. The list includes live animals and meat. The proposal still needs to be adopted by the Council and the European Parliament.

Trade/Tariffs

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on oilseeds. 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 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 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. The text still needs to be formally approved by the European Parliament and the EU Council. The FTA with Mexico agreement abolishes customs duties for most goods, including agricultural products. European Geographic Indications will be protected in Mexico.

For Poultry, Mexico will be allocated a new poultry TRQ of 6,667 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. The EU will benefit from a 20,000 MT zero duty TRQ for exporting poultry legs to Mexico.

Veterinary Medicinal Products Regulation (VMP Regulation)

On October 8, 2021, the EU published Regulation (EU) 2021/1756 concerning official controls to ensure compliance with the prohibition on the use of certain antimicrobials.

On October 7 ,2024, the European Union published Commission Implementing Regulation (EU) 2024/2598, which outlines 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 is the last regulation to effectively extend the restriction on the use of certain antimicrobial medicines to third countries, required by article 118 of 2019/6. The new rules specify which countries can send these products to the EU and will take effect on September 3, 2026. The United States is included in all categories except for equine products (not applicable).

It is important to note that the EU has required two additional animal health attestations to be included on health certificates since September 3, 2024, but isn't requiring the new attestations to be attested until the actual implementation of the VMP Regulation on September 3, 2026. Between these two dates, trading partners are permitted to either delete or cross out the new attestations.

Highly Pathogenic Avian Influenza (HPAI) Situation Update

Since the autumn of 2021, HPAI outbreaks have plagued the EU poultry sector. However, during the 2024/25 period, fewer cases have been reported than in previous years. France implemented a vaccination program for its domestic duck flocks in the fall of 2023 with EU approval.

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

Attachments:

No Attachments