

7 MARKET NEWS for pigmeat

7. October 2026 | Week 41



MARKET SITUATION

The market situation is unchanged from last week.

A large supply of pigmeat continues to put pressure on prices on the European market. Fresh hams and other cuts therefore continue to trade at unchanged or slightly declining prices on the European market.

Continued subdued demand is reported from the UK bacon market.

Demand in Asia is reported to be stable.

Slaughterings in Denmark

Weekly slaughter figures from slaughterhouses reporting to L&F's slaughter database.
Condemned pigs/sows are not included in the slaughter figures.

	Week 36	Week 37	Week 38	Week 39	Week 1-39 2026:25
Total receipts	307,340	320,389	336,247	326,824	+7.8 %

EU

African Swine Fever (ASF)

Below is the latest update from the European Commission's reporting system on cases of African swine fever in EU countries, as well as Serbia, Ukraine, Moldova, Bosnia and Herzegovina, Kosovo, Albania, Montenegro, Kosovo and North Macedonia.

	Period 24 Sep. - 30 Sep.		YTD 1 Jan. - 30 Sep.		2025		2024	
	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar
Estonia		1		83	11	259		36
Latvia		22	1	593	12	1,266	7	961
Lithuania		1		859	9	788	8	561
Poland		28	10	1,721	18	3,351	44	2,311
Italy		12	3	1,096	1	667	31	1,205
Ukraine			9	7	19	34	70	15
Czech Republic						1		27
Romania	7		317	297	472	281	220	186
Hungary		6	6	625		823		474
Bulgaria			1	283		939	1	717
Slovakia			3	134	1	185	1	165
Serbia			217	65	233	62	310	101
Moldova			25	23	52	26	13	6
Montenegro								1
Bosnia and Herzegovina			13	10	52	27	33	38
Croatia			130	106	53	255	6	39
North Macedonia						8	4	51
Finland		2		43				
Belgium								
Spain*		4		373		27		
Germany		12		719		1,992	10	966
Sweden								8
Greece				1	4	77	5	21
Albania							1	3
Total	7	88	735	7,038	937	11,068	764	7,892

* World Organisation for Animal Health.

Foot-and-Mouth Disease

Below is the latest update from the European Commission's reporting system on cases of foot-and-mouth disease (FMD) in EU Member States and Turkey.

	Period 24 Sep. - 30 Sep.	YTD 1 Jan. - 30 Sep.	2025	2024
Slovakia			6	
Cyprus		121		
Greece	2	202		
Turkey		54	1,712	97
Germany			1	
Hungary			5	
Total		377	1,724	97

Germany

New case of African swine fever detected in Brandenburg

According to ISN, citing the German Friedrich Loeffler Institute (FLI), African swine fever (ASF) has again been detected in a wild boar in the Barnim district of Brandenburg. This is the first time since February 2022 that the disease has been detected in the area.

The infected wild boar was found within the existing high-risk area along the Oder River, where protective fencing and restrictions are already in place. The authorities are implementing the necessary control measures, including the establishment of a restriction zone II.

Since ASF re-emerged in neighbouring Uckermark in July 2026, a total of 42 cases have been recorded in the area. As the new cases are located within existing restricted areas, the consequences for the German pig sector and trade in pigs and pigmeat are assessed to be limited.

Boeser takes over Vion's slaughterhouse in Crailsheim

According to ISN, Boeser Frischfleisch took over Vion's slaughterhouse in Crailsheim, Baden-Württemberg, on 28 September 2026. With the acquisition, Boeser is returning to slaughterhouse operations while expanding its business from primarily pigmeat to include beef.

The slaughterhouse employs around 600 people and slaughters approximately 1 million pigs and 95,000 cattle annually. Boeser states that the existing supply arrangements with farmers, producer organisations and other customers will continue unchanged.

The sale forms part of Vion's strategy to focus its activities on the Benelux countries. Premium Food Group was originally expected to take over the slaughterhouse, but the transaction was rejected by the German competition authorities. Boeser subsequently entered into an agreement to purchase the facility in April 2026. The purchase price has not been disclosed.

For producers in the region, the change of ownership primarily means continued marketing opportunities for pigs and cattle through one of southern Germany's largest slaughter facilities.

EU

May/June 2026 pig census

Eurostat has published the preliminary results of the May/June 2026 pig census for 13 of the 15 participating EU countries. Results have now also been published for France and Ireland, while data for Italy and Romania are still pending. Unlike the December census, which covers all EU countries, this census includes only the largest pig-producing Member States.

The results for May/June 2026 are shown below compared with the same census the previous year.

The results continue to indicate broadly stable developments in the EU pig population. This applies to both the total pig population and the breeding herd. The figures for France and Ireland do not change this overall picture.

As expected, the census does not yet reflect the economic challenges affecting the sector in the recent period. These are not expected to become visible until the results of the forthcoming December pig census.

As always, the results of pig censuses should be interpreted with caution. They are sample-based estimates and therefore subject to some uncertainty. In addition, several countries have so far published only preliminary figures, which may be revised in the final results.

1,000 head	Total pig population			Breeding sows			Pregnant sows		
	2026	2025	% change	2026	2025	% change	2026	2025	% change
Spain*	33,104	33,751	-1.9	2,683	2,616	2.6	1,721	1,714	0.4
Germany*	21,044	20,913	0.6	1,407	1,394	0.9	1,003	1,011	-0.8
France	11,503	11,896	-3.3	836	853	-2.0	585	583	0.3
Denmark	12,190	11,887	2.5	1,138	1,148	-0.9	703	707	-0.6
Netherlands	9,188	9,848	-6.7	748	793	-5.7	484	513	-5.7
Poland*	9,206	9,124	0.9	614	614	0.0	433	423	2.4
Italy		7,977			617			484	
Belgium*	5,132	5,262	-2.5	334	340	-1.8	271	275	-1.5
Romania		2,923			221			134	
Hungary	2,808	2,848	-1.4	253	257	-1.6	152	169	-10.1
Austria	2,470	2,486	-0.7	202	208	-2.8	137	141	-2.8
Portugal*	2,305	2,199	4.8	225	222	1.4	153	150	2.0
Ireland	1,636	1,556	5.1	139	136	2.2	87	86	1.2
Czech Republic	1,433	1,441	-0.6	119	123	-3.3	74	77	-3.9
Sweden*	1,253	1,333	-6.0	110	113	-2.7	78	79	-1.3
EU-11*	113,272	114,544	-1.1	8,808	8,817	-0.1	5,881	5,928	-0.8
Serbia*	2,223	2,606	-14.7	340	397	-14.4	127	210	-39.5

*=preliminary figures

Ukrain

Ukrainian pigmeat production under pressure from ASF and the war

The United States Department of Agriculture (USDA) has updated its expectations for Ukraine's pigmeat production, consumption and trade in 2026 and 2027.

According to USDA, Ukraine's pig population and pigmeat production are expected to remain under pressure in both 2026 and 2027. Lower pig prices, the economic consequences of the war and African swine fever (ASF) have particularly affected smaller and less efficient producers, while larger industrial farms are gradually expanding production.

Pigmeat production is expected to decline slightly from 2025 to 2026 before increasing modestly in 2027. At the same time, the pig population is expected to decline in 2026, followed by a moderate recovery in 2027 driven by industrial producers.

The Ukrainian pigmeat sector remains strongly focused on the domestic market. ASF outbreaks and the lack of regionalisation significantly limit export opportunities, and pigmeat exports are therefore expected to remain very modest. Imports, however, are expected to remain relatively high, as domestic production cannot fully meet demand. Imports originate primarily from EU countries.

USDA expects lower pigmeat prices and increased imports to support a slight increase in consumption in both 2026 and 2027. The report also notes that Russian attacks on energy, storage and logistics infrastructure continue to pose a significant risk to pigmeat production and distribution in Ukraine.

For beef, USDA expects both the cattle population and production to decline significantly in 2026 and 2027, while exports continue to be supported by high international prices and strong demand for live cattle and beef.

Slaughter weight, 1,000 tonnes	2025	2026	2027
Slaughterings (head)	6,692	6,650	6,700
Production	605	600	610
Pigmeat imports	40	50	45
Pigmeat exports	3	1	2
Consumption	642	649	653

USA

Future prices

Chicago (\$ per 100 lbs carcass weight)	Lean Hog			Pork Cutout		
	2/10	25/9	Change	2/10	25/9	Change
October 2026	77.88	78.23	-0.35	107.28	107.28	0.00
December 2026	70.13	69.03	1.10	95.13	95.13	0.00
Feb. 2027	71.33	70.33	1.00	97.73	97.73	0.00
Apr. 2027	76.35	75.93	0.42	99.83	99.83	0.00
May 2027	81.00	80.70	0.30	105.20	105.20	0.00
June 2027	89.90	89.25	0.65	110.55	110.55	0.00
July 2027	92.03	91.23	0.80	111.90	111.90	0.00
Aug. 2027	92.23	91.15	1.08	110.75	110.75	0.00
October 2027	78.63	76.63	2.00	103.15	103.15	0.00
December 2027	71.70	69.90	1.80	91.00	91.00	0.00
Feb. 2028	75.10	73.50	1.60	93.60	93.60	0.00
Conversion to DKK/kg:						
1 lb = 0.4536 kg						
1 USD = 6.6580 DKK						

Brazil

Brazilian pig prices increase for the first time this year

According to the Brazilian analysis institute CEPEA, prices for live pigs and half carcasses increased in September for the first time in 2026. The price increase was primarily due to a lower supply of pigmeat combined with stronger domestic demand.

CEPEA also reports that the Brazilian slaughtering and processing industry experienced a more stable and intensive level of activity during the month, contributing to higher prices for both live pigs and half carcasses. Prices for some cuts, however, continued to develop weakly and declined during September.

A market survey conducted by CEPEA also shows that market participants expect positive market developments at the beginning of October. Slaughterhouses and processing companies are building stocks ahead of the year-end holidays, while household demand typically increases at the beginning of the month. This supports expectations of continued strength in the Brazilian pig market in the short term.

Pigmeat exports up 4.8% in the first nine months of the year

The table below shows the official figures for Brazil's exports of fresh and frozen pigmeat in January-September 2026 compared with the same period in the previous two years.

The figures show a 4.8% increase in exports in the first three quarters of 2026, and Brazil thus continues to expand exports of fresh and frozen pigmeat. In the first nine months of the year, Brazil exported fresh and frozen pigmeat to 100 different countries.

Exports to the Philippines, China and Hong Kong declined compared with the same period last year, while exports to Japan increased in particular. Exports to Malaysia also increased significantly during the period.

0203				
Fresh/frozen pigmeat				
Tonnes	Jan. - Sep. 2024	Jan. - Sep. 2025	Jan. - Sep. 2026	% change 2026:2025
Philippines	143,262	240,891	222,678	-7.6
Japan	64,569	83,996	142,387	69.5
Chile	81,772	90,621	95,471	5.4
China	164,834	115,573	85,014	-26.4
Hong Kong	65,497	71,233	55,560	-22.0
Argentina	7,968	38,645	48,674	26.0
Mexico	31,020	53,813	47,633	-11.5
Singapore	63,422	57,199	44,916	-21.5
Vietnam	36,002	44,898	43,285	-3.6
Uruguay	33,752	38,493	40,841	6.1
Georgia	17,565	18,768	26,051	38.8
South Korea	19,387	16,292	21,913	34.5
Angola	16,497	14,527	16,152	11.2
Malaysia	512	108	15,840	14566.7
Côte d'Ivoire	8,226	11,595	14,434	24.5
Peru	4,657	5,747	13,733	139.0
Congo (DROC)	8,160	9,684	11,674	20.5
Dominican Republic	12,014	4,014	10,594	163.9
South Africa	3,093	2,550	9,712	280.9
UAE	9,930	10,134	8,941	-11.8
Canada	6,397	7,923	6,058	-23.5
Cuba	4,193	4,622	5,424	17.4
Liberia	4,944	5,189	5,404	4.1
Puerto Rico	11,603	7,633	5,210	-31.7
Russia	2,816	839	4,756	466.9
USA	13,897	8,193	4,452	-45.7
Albania	4,578	4,270	4,238	-0.7
Haiti	4,372	1,835	3,509	91.2
Congo (ROC)	1,137	1,512	2,009	32.9
Armenia	1,386	1,058	1,777	68.0
Others	14,533	13,224	14,006	5.9
Total	861,995	985,079	1,032,346	4.8

Brazilian pigmeat production expected to continue growing in 2027

According to Conab, Brazil's authority for agricultural statistics, food supply and market analysis under the Ministry of Agriculture, the country's pigmeat production is expected to reach 5.93 million tonnes in 2026. This corresponds to an increase of 4.8% compared with the previous year. Growth is driven by a larger breeding herd and continued productivity improvements in the Brazilian pig sector.

Higher production makes it possible to increase exports by 6.5% to 1.58 million tonnes without reducing supplies to the domestic market. Domestic consumption is therefore expected to increase by 4.3% to 4.36 million tonnes.

For 2027, Conab expects the positive trend to continue. Pigmeat production is expected to increase by a further 3.7% to 6.15 million tonnes, while exports are expected to grow to 1.65 million tonnes. At the same time, domestic supplies are expected to increase by 3.6% to 4.52 million tonnes.

For the other meat categories, Conab expects continued growth in poultry meat production in both 2026 and 2027, while beef production is expected to decline due to a lower supply of cattle for slaughter and rebuilding of the cattle population.

Philippines

Philippines considers higher tariff on pig jowls

According to several international media outlets, the Philippine authorities' proposal to raise the tariff on imported pig jowls is facing opposition from both Canada and the US pig sector. The proposal aims to limit imports and strengthen local pig producers by reclassifying pig jowls from by-products to regular pigmeat.

Canada warns that raising the tariff from 10-15% to 25% will increase costs for the food industry and lead to higher prices for processed meat products such as sausages, in which pig jowls are used as a raw material. Canada also emphasises that imports help secure pigmeat supplies in the Philippine market.

The US industry organisation National Pork Producers Council (NPPC) also opposes the proposal. The organisation argues that, under international tariff rules, pig jowls should continue to be classified as by-products rather than regular pigmeat. NPPC refers to corresponding practice in the USA and Europe.

The Philippine Department of Agriculture maintains that a higher tariff could limit imports and improve conditions for local pig producers. To avoid significant consumer price increases, the authorities have also opened the possibility of introducing a price ceiling on imported pig jowls.

Pig jowls are among the most imported pigmeat products in the Philippines, with imports of around 130,000 tonnes over the last three years.

Japan

Increased pigmeat imports in the first eight months of 2026

The table below shows Japan's total pigmeat imports, including fresh and frozen products, in January-August 2026 compared with the same period the previous year.

Total Japanese pigmeat imports increased by 6.0% in the first eight months of the year.

Imports increased from all major exporting countries except Spain.

The positive trend of rising imports from Denmark also continued in August, after Japanese imports from Denmark were lower at the beginning of the year.

Total pigmeat			
Tonnes	2026 Jan. - Aug.	2025 Jan. - Aug.	% change 2026:25
USA	229,483	205,229	11.8
Canada	204,372	180,054	13.5
Brazil	107,452	75,014	43.2
Mexico	80,409	71,448	12.5
Spain	45,363	124,940	-63.7
Denmark	36,916	28,780	28.3
Chile	36,633	31,307	17.0
Netherlands	19,340	10,124	91.0
France	12,863	11,109	15.8
China	11,662	11,025	5.8
Ireland	10,631	6,842	55.4
Thailand	4,899	4,950	-1.0
UK	4,261	1,415	201.1
Belgium	2,330	171	1262.6
Austria	1,619	700	131.3
Finland	1,568	1,308	19.9
Portugal	1,439	868	65.8
South Korea	177	282	-37.2
Taiwan	104	80	30.0
Others	313	363	-13.8
Total	811,834	766,009	6.0

0203			
Fresh/frozen pigmeat			
Tonnes	2026 Jan. - Aug.	2025 Jan. - Aug.	% change 2026:25
Canada	194,979	171,151	13.9
USA	159,739	139,147	14.8
Brazil	104,536	70,405	48.5
Mexico	72,199	64,080	12.7
Spain	43,718	122,935	-64.4
Denmark	31,216	24,854	25.6
Chile	27,105	23,219	16.7
Netherlands	19,325	10,093	91.5
France	12,484	10,805	15.5
Ireland	6,408	2,788	129.8
UK	4,261	1,415	201.1
Belgium	2,294	150	1429.3
Austria	1,518	633	139.8
Portugal	1,366	830	64.6
Finland	1,315	1,010	30.2
Australia	4	61	-93.1
Total	682,466	643,576	6.0

Australia

USDA expects Australian production to remain unchanged in the coming years

The United States Department of Agriculture (USDA) has updated its expectations for the Australian beef and pigmeat markets in 2026 and 2027.

For pigmeat, Australian production is expected to remain largely unchanged in the coming years. Production is forecast at 472,000 tonnes in 2026 and to increase slightly to 475,000 tonnes in 2027.

Although producer economics were previously supported by low feed costs and high producer prices, production growth has been constrained by demand. High retail pigmeat prices have weakened competitiveness, particularly against poultry meat, which remains the cheapest source of animal protein for Australian consumers.

USDA nevertheless expects total pigmeat consumption to increase moderately from 2026 to 2027 as a result of population growth. Per capita consumption, however, is expected to continue declining slightly.

USDA expects pigmeat imports to remain stable in both 2026 and 2027. Imported pigmeat is used primarily for processed products such as ham, bacon and other meat products, while the fresh pigmeat market continues to be dominated by domestic production. Exports are expected to decline slightly in 2027 due to increased international competition and relatively high Australian prices.

USDA's report thus points to an Australian pig market characterised by stable production and imports, while higher prices and competition from poultry meat limit growth opportunities.

For beef, USDA expects production and exports to reach record levels in 2026. In 2027, both production and exports are expected to decline slightly, while remaining at historically high levels due to a large and productive cattle population and continued strong international demand.

Slaughter weight, 1,000 tonnes	2025	2026	2027
Slaughterings (head)	5,753	5,730	5,760
Production	475	472	475
Pigmeat imports	214	220	220
Pigmeat exports	46	42	40
Consumption	643	650	655