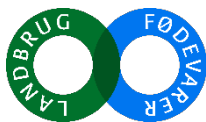


MARKET NEWS for pig meat



Market analysis

1 July 2025

Week 27

MARKET SITUATION

Europe: Trading in legs and other cuts is at unchanged prices this week.

UK: Stable trade

Asian markets: Demand is stable.

Slaughtering in Denmark

Weekly slaughtering figures from slaughterhouses that report their slaughtering figures to DAFC's slaughter database. The figures exclude culled pigs.

	Week 22	Week 23	Week 24	Week 25	Weeks 1-25 2025:24
Total	215,172	229,840	227,827	282,716	0.7



USA

Futures

Chicago (\$ per 100 lbs carcase weight)	Lean Hog			Pork Cutout		
	27/6	20/6	Change	27/6	20/6	Change
2025						
Jul	113.25	112.78	0.47	121.55	121.25	0.30
Aug	110.28	112.45	-2.17	116.70	116.40	0.30
Oct	94.63	96.03	-1.40	108.40	108.10	0.30
Dec	85.70	86.63	-0.93	96.00	95.95	0.05
2026						
Feb	87.18	87.65	-0.47	96.95	96.90	0.05
Apr	89.58	89.30	0.28	98.08	98.03	0.05
May	92.25	91.80	0.45	104.68	104.63	0.05
Jun	98.55	97.65	0.90	110.25	109.98	0.27
Jul	98.45	97.68	0.77	111.38	111.33	0.05
Aug	97.00	96.30	0.70	109.90	109.85	0.05
Oct	81.55	81.10	0.45	102.30	102.25	0.05
Dec	73.45	72.45	1.00	90.15	90.10	0.05

Conversion factors:

1 lb = 0.4536 kg

1 \$ = DKK

6.3750



African Swine Fever

According to the EU Commission's reporting system for the outbreak of disease, outbreaks of ASF have been reported for the following countries, plus Serbia, Ukraine, Moldova, Bosnia-Herzegovina, Kosovo, Albania, Montenegro, and North Macedonia

Countries	Period 19 June - 25 June		Year to date 1 Jan - 25 June		2024		2023	
	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar
Estonia				35		36	2	53
Latvia		1	1	636	7	961	8	730
Lithuania		4		463	8	561	3	436
Poland	1	41	1	2,351	44	2,311	30	2,686
Italy		12	1	430	31	1,205	17	1,050
Ukraine		1	15	25	70	15	38	9
Czech Republic						27		56
Romania	4	3	168	131	220	186	737	289
Hungary		17		609		474		403
Bulgaria				271	1	717	3	653
Slovakia		1	1	155	1	165		535
Serbia			18	28	310	101	992	213
Moldova		3	35	14	13	6	18	6
Montenegro						1		
Bosnia-Herzegovina			8	13	33	38	1,511	29
Croatia		1	1	8	6	39	1,124	13
North Macedonia				7	4	51	16	47
Kosovo							9	4
Belgium								
Germany		41		1,604	10	966	1	887
Sweden						8		60
Greece			3	74	5	21	6	2
Albania					1	3		
Total	5	125	252	6,854	764	7,892	4,515	8,161

Foot and mouth disease

The following provides an update from the EU Commission's reporting system for foot & mouth disease in EU countries and Turkey.

Countries	Period 19 June - 25 June	Year to date 1 Jan - 25 June	2024	2023
Slovakia		6		
Turkey		174	97	350
Germany		1		
Hungary		5		
Total		186	97	350



USA

Stable pig population continues

The results of the U.S.' pig census of 1 June 2025 were published last week by the USDA.

Compared to the same census of one year ago, the results show a largely unchanged pig population. The breeding herd fell by 0.5 per cent while piglets and finishers are 0.4 per cent up on one year ago.

Similar stability is reflected in expected farrowings, which are almost on a par with the year before.

'000 head	2025 1 June	2024 1 June	% change
Breeding herd	5,979	6,008	-0.5
Piglets and finishers	69,158	68,884	0.4
Total	75,137	74,892	0.3
	2025	2024	
Expected farrowings:			
June - Aug	2,974	2,985	-0.4
Sept - Nov	2,946	2,925	0.7

According to U.S. media, the results of the 1 June census are slightly higher than expected by the majority of U.S. analysts.



USA

Decline in pig meat storage

With the USDA as the source, the following table shows the latest calculations for U.S. storage of pig meat as at 31 May 2025 compared to the previous month and to one year ago.

1,000 pounds	31 May 2024	30 Apr 2025	31 May 2025	% change last month	% change last year
Picnics	5,511	7,215	6,997	-3.0	27.0
Legs	109,351	88,514	107,866	21.9	-1.4
Bellies	71,938	56,959	53,013	-6.9	-26.3
Loins	34,280	37,470	36,525	-2.5	6.5
Ribs	76,332	95,443	80,335	-15.8	5.2
Butts	20,224	18,105	16,100	-11.1	-20.4
Trimming	43,344	45,583	45,092	-1.1	4.0
By-products	78,681	70,130	69,562	-0.8	-11.6
Other	42,814	36,763	35,493	-3.5	-17.1
Total pig meat	482,475	456,182	450,983	-1.1	-6.5
Beef	412,648	419,232	407,786	-2.7	-1.2
Poultry	1,172,357	1,075,973	1,102,720	2.5	-5.9

Total storage in May was 1.1 per cent down on the previous month and 6.5 per cent lower compared to one year ago.

 **GERMANY**
Three new cases of African Swine Fever suspected in North Rhine-Westphalia

Three new cases of wild boar with African Swine Fever are suspected in North Rhine-Westphalia. They have not yet been confirmed by the German authorities.

As the boar were found close to five previously confirmed cases, no changes need to be made to the restricted zones should the virus be confirmed.

Further analyses of the virus found in North Rhine-Westphalia have been undertaken. The analyses shows that the virus probably originated from Italy. The type of virus in North Rhine-Westphalia differs from previously known cases in Germany.

North Rhine-Westphalia is one of the major pig production areas in Germany where many pigs are produced and slaughtered.

 **GERMANY**
Pig population in North Rhine-Westphalia shows a slight change

ISN in Germany reports that preliminary figures from the May census for the pig population of North Rhine-Westphalia shows that the pig population is more or less unchanged compared to one year ago.

The number of pig farms in North Rhine-Westphalia fell by 2.5 per cent over the period, making the total number around 5,100.

The pig population totalled 5.78 million pigs, which is 0.2 per cent higher compared to the same time last year. There were more piglets and finishers, but the breeding population showed a slight decline.

 **POLAND**
First case of African Swine Fever at a domestic pig farm in 2025

According to international media, Poland has reported its first case of African Swine Fever at a domestic farm in 2025.

The affected farm is approx. 50 km from Gdansk, and has around 1,300 pigs. The area has been badly affected by African Swine Fever among the wild boar population. That the virus has entered a domestic pig farm comes as no great surprise, report the media.

 **SPAIN**
Sigma Alimentos invests EUR 157 million in a new factory in Valencia

According to a press release from the Mexican food company, Sigma Alimentos, the company is investing EUR 157 million in Spain: in a new factory in Valencia and expansion of capacity at the factory in Castilla y León. They wish to restore the company's production capacity after floods in Q4 2024 rendered their factory in Torrente unusable.

The majority of financing is expected to come from insurance payouts and government initiatives. The company expects to have restored production capacity by 2027.

Sigma produces 1.8 million tonnes of food products in 17 different countries and employs more than 47,000 employees.



Agreement to improve animal welfare by 2040 concluded

International news media report that the Dutch Minister of Agriculture Femke Wiersma has entered into an agreement with representatives from animal welfare organisations, the agricultural sector and market participants to boost animal welfare in Dutch livestock farming.

The agreement outlines how animal welfare will be gradually improved by 2040 while still ensuring farmers of a fair income. The proposed measures could have a major economic impact on the sector. Supermarkets, processing companies and other market players, therefore, need to take responsibility for selling products at a fair price so that farmers are guaranteed a fair income even with higher costs.

As regards the pig sector, there are stricter requirements for daylight, the design of housing and the climate. There is also a focus on loose lactating sows and a reduction in stock rates in barns.

A newly established body will monitor and report on the extent to which the objectives of the agreement are being achieved. In 2028, 2033 and 2038, the authority is scheduled to review whether all the prerequisites for taking the next steps have been met.

The agreement is based on the draft ordinance on animal-friendly livestock 2024, which the minister sent out for consultation last week. The ordinance is expected to be presented to the Dutch parliament in the autumn.



Pigmeat Statistics 2024 now available

Pigmeat Statistics is now available in both Danish and English on the Danish Agriculture & Food Council's website.

The publication compiles key figures and analyses on Danish and international pig production and provides a comprehensive overview of the structure of the industry, its economy and trade.

Pigmeat Statistics 2024 contains data on the following areas:

- Structure of the pig herd in Denmark and the EU
- Development in the pig herd and production nationally and globally
- Slaughtering structure and employment
- Pig prices and the economy of pig production
- Exports and imports of pig meat, volumes and values, by country and product
- Common Agricultural Policy for pig meat and global trade

See more at [Pigmeat Statistics 2024](#)


Stable pig meat imports continue

The table below shows Japan's total imports of pig meat, including fresh/frozen pig meat, for the period January-May 2025 compared to the same period last year.

Total pig meat			
Tons	2025 Jan-May	2024 Jan-May	% change 2025:24
USA	126,193	145,313	-13.2
Canada	110,720	109,560	1.1
Spain	78,260	67,752	15.5
Brazil	48,825	24,076	102.8
Mexico	44,408	54,192	-18.1
Denmark	19,811	31,012	-36.1
Chile	19,065	21,697	-12.1
France	7,009	8,610	-18.6
China	6,663	6,009	10.9
Holland	6,672	6,953	-4.0
Ire	4,152	4,946	-16.1
Thailand	3,045	3,361	-9.4
UK	982	206	376.7
Finland	732	673	8.8
Austria	632	130	386.2
Portugal	436	98	344.9
South Korea	199	203	-2.0
Belgium	107	8	1237.5
Others	306	204	50.0
Total	478,217	485,003	-1.4

0203 Fresh/frozen pig meat			
Tonnes	2025 Jan-May	2024 Jan-May	% change 2025:24
Canada	105,526	102,984	2.5
USA	85,989	101,338	-15.1
Spain	77,075	66,689	15.6
Brazil	45,436	22,171	104.9
Mexico	39,570	50,148	-21.1
Denmark	17,286	24,468	-29.4
Chile	14,338	17,234	-16.8
France	6,793	8,477	-19.9
Holland	6,656	6,847	-2.8
Ireland	1,682	2,620	-35.8
UK	981	206	376.2
Austria	586	72	713.9
Finland	526	537	-2.0
Portugal	422	78	441.0
Belgium	93	2	4550.0
Others	45	66	-31.8
Total	403,004	403,937	-0.2

N.B.

Due to summer holidays, Market News will not be published next week.

The next issue will come out in week 29.