

Europe: Trading in legs and other cuts is stable and at largely unchanged prices.

Asian markets: Demand is stable.

Weekly slaughtering figures from slaughterhouses that report their slaughtering figures to

DAFC's slaughter database. The figures exclude culled pigs.

	Week 33	Week 34	Week 35	Week 36	Weeks 1-36 2025:24
Total	282,958	279,111	278,275	279,337	+3.2 %

Futures

[illegible]



African Swine Fever

The table below provides an update from the EU Commission's reporting system for outbreaks of African Swine Fever in EU countries plus Serbia, Ukraine, Moldova, Bosnia-Herzegovina, Kosovo, Albania, Montenegro and North Macedonia.

Country	Period 4 Sept - 10 Sept		Year to date 1 Jan - 10 Sept		2024		2023	
	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar	Pigs	Wild boar
Estonia		15	10	124		36	2	53
Latvia	3	17	11	827	7	961	8	730
Lithuania		14	5	531	8	561	3	436
Poland	1	39	17	2,729	44	2,311	30	2,686
Italy		9	1	535	31	1,205	17	1,050
Ukraine			17	29	70	15	38	9
Czech Republic				1		27		56
Romania	17		323	154	220	186	737	289
Hungary		5		690		474		403
Bulgaria		1		275	1	717	3	653
Slovakia			1	159	1	165		535
Serbia	1		125	44	310	101	992	213
Moldova	1		47	16	13	6	18	6
Montenegro						1		
Bosnia-Herzegovina			18	15	33	38	1,511	29
Croatia	7		24	15	6	39	1,124	13
North Macedonia				7	4	51	16	47
Kosovo							9	4
Belgium								
Germany		47		1,834	10	966	1	887
Sweden						8		60
Greece			4	74	5	21	6	2
Albania					1	3		
Total	30	147	603	8,059	764	7,892	4,515	8,161

Foot & Mouth disease

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

Countries	Period 4 Sept - 10 Sept	Year to date 1 Jan - 10 Sept	2024	2023
Slovakia		6		
Turkey	133	731	97	350
Germany		1		
Hungary		5		
Total	133	743	97	350



USA

Pig producers urge a political solution to Proposition 12 regulations

More than 100 U.S. pork producers from 20 U.S. states travelled to Washington last week in an attempt to put pressure on Congress to find legislative solutions to California's Prop. 12 regulations, U.S. media report.

Large sections of the U.S. pigmeat industry have long pushed for politicians to do something about the current Prop.12 regulations, which the industry says is driving up costs for consumers, threatening small family farms and disrupting trade between the U.S. states.

During meetings with members of Congress, pig producers stressed that without legislative intervention, pigmeat prices could continue to rise.

Pigmeat producers want the upcoming farm bill to include legislation that would limit Prop. 12 rules to only apply to Californian producers and not everyone supplying meat to the state.

In May 2023, the U.S. Supreme Court approved California's Prop. 12 legislation by a vote of 5-4: legislation that prohibits the sale of meat from pigs that were born and bred in accordance with the state's animal welfare regulations.

Earlier this year, the U.S. Supreme Court rejected a request to reconsider Prop. 12 legislation in California.



CHINA

USDA expects stable Chinese production and slightly falling pigmeat imports in 2026

The USDA has updated its projections for China's production, consumption and trade in pigmeat in 2025 and 2026.

As can be seen from the table below, the USDA expects Chinese production and import of pigmeat in 2026 to be not far from 2024's and 2025's levels.

The USDA's forecast for 2026 is based on a projection for stable Chinese slaughtering numbers, but with lower carcase weights compared to 2024 and the first half of 2025. Secondary fattening has proved to be a challenge and has led to increased carcase weight and increased production. With political focus and shifting behaviour among the largest producers, slaughter weight is expected to be reduced going forward.

The USDA's projections for production in 2025 have been upgraded by 1 per cent compared to their most recent projection from March 2025. This is due to the fact that production in the first six months of 2025 was 1.3 per cent higher compared to the same period in 2024.

Chinese consumption of pigmeat has declined somewhat in favour of poultry, eggs, dairy products and seafood and the USDA expects this shift in consumer demand to continue. A slight decline in consumption of pigmeat in China is therefore expected.

Chinese pigmeat imports are expected to show a slight decline in 2026 following a modest rise in 2025. The forecast for stable Chinese pig production means that the need to import pigmeat is less than in previous years. By-products continue to account for the majority of imports. USDA expects that tariffs on U.S. pigmeat will also affect U.S. exports to China in 2026. The report does not address the recent Chinese tariffs on pigmeat from the EU.

Carcase weight, 1,000 tonnes	2024	2025	2026
Slaughterings (million head)	702.6	703.0	703.8
Production	57,060	57,150	57,150
Pigmeat imports	1,306	1,330	1,306
Pigmeat exports	97	100	105
Consumption	58,269	58,380	58,345



USDA expects stable Japanese production and increasing pigmeat imports in 2026

The USDA has updated its projections for Japan's production, consumption and trade in pigmeat in 2025 and 2026.

As shown in the table below, the USDA expects both production and imports of pig meat in 2026 to be on a par with the previous two years.

Japan's pigmeat market is characterised by stable production, robust consumption and strategic adjustments in imports – a trend that is expected to continue in 2026.

Japanese producers are focused on maximising profits by meeting quality standards that allow access to higher prices without increasing overall production.

Pigmeat consumption in Japan is expected to remain strongly driven by demand from households and the food industry. This will be offset by weaker demand for processed products that are affected by price rises. The retail sector increasingly uses frozen, imported pigmeat in order to meet consumer preferences for convenience and lower costs.

Imports of pigmeat are expected to decline in H2 2025 due to large inventories but are expected to rise again in 2026 to offset the continued high domestic demand.

The USDA also highlights that imports of frozen pigmeat, particularly from Brazil, have increased in 2025. This is happening at the cost of imports of fresh pigmeat and due to the retail sector's increased demand for frozen pigmeat.

Carcase weight, 1,000 tonnes	2024	2025	2026
Slaughtering	16,265	16,050	16,050
Production	1,288	1,270	1,270
Pigmeat imports	1,487	1,460	1,480
Pigmeat exports	2	2	2
Consumption	2,751	2,760	2,765



USDA expects Brazil's production and export of pigmeat in 2026 to increase

The USDA has updated its projections for Brazil's production, consumption and trade in pigmeat in 2025 and 2026.

As can be seen from the table below, the USDA expects production and exports of pigmeat in 2025 and 2026 to be higher than in 2024.

The USDA expects production to increase by 3 per cent in 2025 and by 1 per cent in 2026. Brazilian pig producers posted strong earnings in 2025 and this is expected to continue in 2026. Earnings improved as a result of lower production costs and increased global demand for Brazilian pigmeat.

In general, the forecast for Brazilian production, consumption and trade is based on strong foreign and domestic demand, increased availability of feed due to record-high production of maize and soybeans, as well as a devalued Brazilian currency which makes Brazilian pigmeat cheaper in the global market.

Pigmeat consumption in Brazil, however, is expected to remain stable in 2025 and 2026 despite the increased supply. Inflation is expected to impact pigmeat consumption in 2025 and 2026. Beef and poultry are favoured over pigmeat. As pigmeat prices have increased in Brazil, this has also had a negative impact on domestic demand.

The USDA expects Brazil to become the third largest exporter of pigmeat in 2026, with a rise in exports of 14 per cent in 2025 and 2 per cent in 2026. The forecast is based on increased availability of pigmeat, strong external demand, increased purchases from new markets, promotion of exports to existing markets and an animal health status free from both African Swine Fever and Foot & Mouth Disease.

The USDA expects that Brazilian pigmeat exports in 2025 and 2026 will account for 37 per cent of Brazil's total pigmeat production.

Carcase weight, 1,000 tonnes	2024	2025	2026
Slaughtering	46,000	47,005	47,370
Production	4,500	4,750	4,815
Pigmeat imports	3	3	2
Pigmeat exports	1,531	1,750	1,790
Consumption	2,972	3,003	3,027