



Brussels,
AGRI.E/PV/KS(2026) 2307449

MINUTES

Meeting of the Expert Group Meat Market Observatory

Thursday 12 February 2026

Chair: AGRI E3 Animal Products

1. Approval of the agenda and of the minutes of previous meeting

2. Nature of the meeting: non-public virtual meeting

3. List of points discussed

1. Pigmear Market Situation
2. Beef Market Situation
3. Contribution from member organisation

4. Conclusions/recommendations/opinions

4.1 Pigmear Market Situation

- Market conditions are currently challenging for EU pigmeat producers, with decreasing producer prices, increasing production, China's additional import duties and African swine fever (ASF) outbreaks.
- EU production has been increasing last year, on both increased slaughter and higher slaughter weights.
- Prices have been on a downward trend in recent months, intensified by an outbreak of ASF in Spain, the EU's biggest producing and exporting MS. The imposition of additional duties by China in the wake of their antidumping investigation also played a role, although the final determination is much lower than the preliminary announcement.
- Pigmear prices started stabilizing in recent weeks, and piglet prices are back on an increasing trend.
- With high production costs and lower prices, producer margins are under pressure.

- EU exports went up in January-October last year, with China and the UK as main destinations.
- Participants expressed concerns about the pigmeat price level and producers operating at a loss, as well as about third country closures because of ASF.

4.2 Beef Market Situation

- The EU beef market is strong and stable with producer prices at historically high levels, stimulated by a solid internal and external demand and limited supply.
- Producer margins have improved despite high prices for live animals.
- Trade was dynamic until October 2025, with a largely positive EU trade balance.
- Participants expressed concerns on the reduction of production and on the possible impacts of trade agreements (e.g. Mercosur and Australia).

4.3 Contributions from member organisations

- EuroCommerce presented data on retail sales and prices for meat products.
- After significant volume losses in 2021-2024, overall food retail sales are now more stable as we come out of the worst of the cost-of-living crisis.
- However, consumers are still cautious and price sensitive when shopping for food. Considerations linked to health and short supply chains continue to be important for consumers.
- Beef is seeing some significant price increases which translate into fewer sales. Poultry continues to perform well, and pigmeat is also seeing some sales volume growth in France, Italy and Spain

5. Next steps

The Observatory will keep monitoring the situation and evolution of the beef and veal, and pigmeat markets, paying particular attention to challenges emerging from EU production and price evolution, international trade, and changing consumption patterns.

6. Next meeting

The next meeting of the Meat MO is scheduled for 29 October 2026 (tbc).

7. List of participants

See enclosed list of organisations present.

List of participants– Minutes

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ORGANISATION
CEJA
CLITRAVI
COGECA
COPA
EUROCOMMERCE
U.E.C.B.V.

