Market analysis and forecast for beef and pork production in Germany 2025/2026

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Thünen Working Paper 274

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Zusammenfassung

In einer globalen Betrachtung sind die Schweine- und Geflügelfleischmärkte eher ausgeglichen. Geflügelfleisch wurde sowohl mehr erzeugt als auch nachgefragt. Dagegen entstand am Rindfleischmarkt ein starker Nachfrageüberhang, der zu weltweit deutlichen Preiserhöhungen führte.

In Deutschland stagniert die mengenmäßige Nachfrage nach Fleisch und Fleischerzeugnissen bei anhaltend hohem Preisniveau sowohl auf Erzeuger- als auch auf Konsumebene. Die Entwicklung wird begleitet durch eine Verschiebung der Nachfrage hin zu eher preisgünstigen Produkten.

Der Rückgang der Rinder- und Schweinebestände in Deutschland in den vergangenen 5 bis 10 Jahren ist verbunden mit um circa 20% geringeren Schlachtungen. Das führt zu deutlichen Anpassungen in der Schlachthof- wie auch Fleischverarbeitungsstruktur.

Auch in Deutschland zeigt sich eine Verknappung des Schlachtrinderangebotes mit der Folge enorm gestiegener Erzeugerpreise im laufenden Jahr 2025. Trotz des hohen Erzeugerpreisniveaus werden weiterhin Kälber in großer Zahl exportiert und nicht gemästet. Offensichtlich ist die Rentabilität der Mast weiterhin vielfach nicht gegeben.

Für das Jahr 2025 ist von einem Rückgang der Schlachtmenge Rindfleisch von knapp 7 % auszugehen. Für 2026 wird eine leichte Steigerung um knapp 2 % geschätzt. Unsicherheit besteht hierbei hinsichtlich der Auswirkungen der Blauzungenkrankheit auf die Erzeugung, so dass die angenommene Zunahme wohlmöglich nicht eintritt.

Seit Mitte des Jahres 2023 ist sowohl EU-weit als auch in Deutschland der Erzeugerpreis für Schlachtschweine bis Juli 2025 deutlich um fast 20 % gesunken. Der Schweinebestand sinkt nach Jahren massiver Schrumpfung aktuell nur noch geringfügig in Deutschland. Dagegen geben weiterhin viele Betriebe die Schweinehaltung auf; aktuell mehr als 3 % gegenüber dem Vorjahr.

Wie schon im Jahr 2024 wird es auch 2025 zu einer geringfügigen Ausdehnung der Schlachtmenge Schweinefleisch kommen. Tatsächlich konnten auch in 2024 und voraussichtlich 2025 leicht größere Mengen exportiert werden, trotz der weiterhin präsenten ASP. Seit 2023 stagniert der inländische Verbrauch.

Für 2026 wird mit einer Fortsetzung der eher stagnierenden Entwicklung von Erzeugung und Verbrauch gerechnet.

Keywords: Fleischerzeugung, Fleischnachfrage, Schweinefleisch, Rindfleisch, Fleischverbrauch, Marktanalyse

Summary

From a global perspective, the pork and poultry markets are fairly balanced. Poultry meat production and demand both increased. In contrast, there was a strong excess of demand on the beef market, which led to significant price increases worldwide.

In Germany, demand for meat and meat products is stagnating in terms of volume, with prices remaining high at both producer and consumer levels. This development is accompanied by a shift in demand towards more affordable products.

The decline in cattle and pig stocks in Germany over the past 5 to 10 years has been accompanied by a reduction in slaughtering of around 20%. This has led to significant adjustments in the structure of slaughterhouses and meat processing.

Germany is also experiencing a shortage of slaughter cattle, resulting in a huge increase in producer prices in the current year 2025. Despite the high producer price level, large numbers of calves continue to be exported rather than fattened. It is clear that fattening is in many cases still not profitable.

A decline in beef slaughter volumes of just under 7% is expected for 2025. A slight increase of just under 2% is estimated for 2026. There is uncertainty here regarding the impact of bluetongue disease on production, so the assumed increase may well not materialise.

Since mid-2023, the producer price for slaughter pigs has fallen significantly by almost 20% both across the EU and in Germany, and this trend is expected to continue until July 2025. After years of massive decline, the pig population in Germany is currently falling only slightly. However, many farms are still giving up pig farming; currently more than 3% compared to the previous year.

As in 2024, there will be a slight increase in the volume of pork slaughtered in 2025. In fact, slightly larger quantities were exported in 2024 and are expected to be exported in 2025, despite the continued presence of ASF. Domestic consumption has been stagnating since 2023.

The rather stagnant development of production and consumption is expected to continue in 2026.

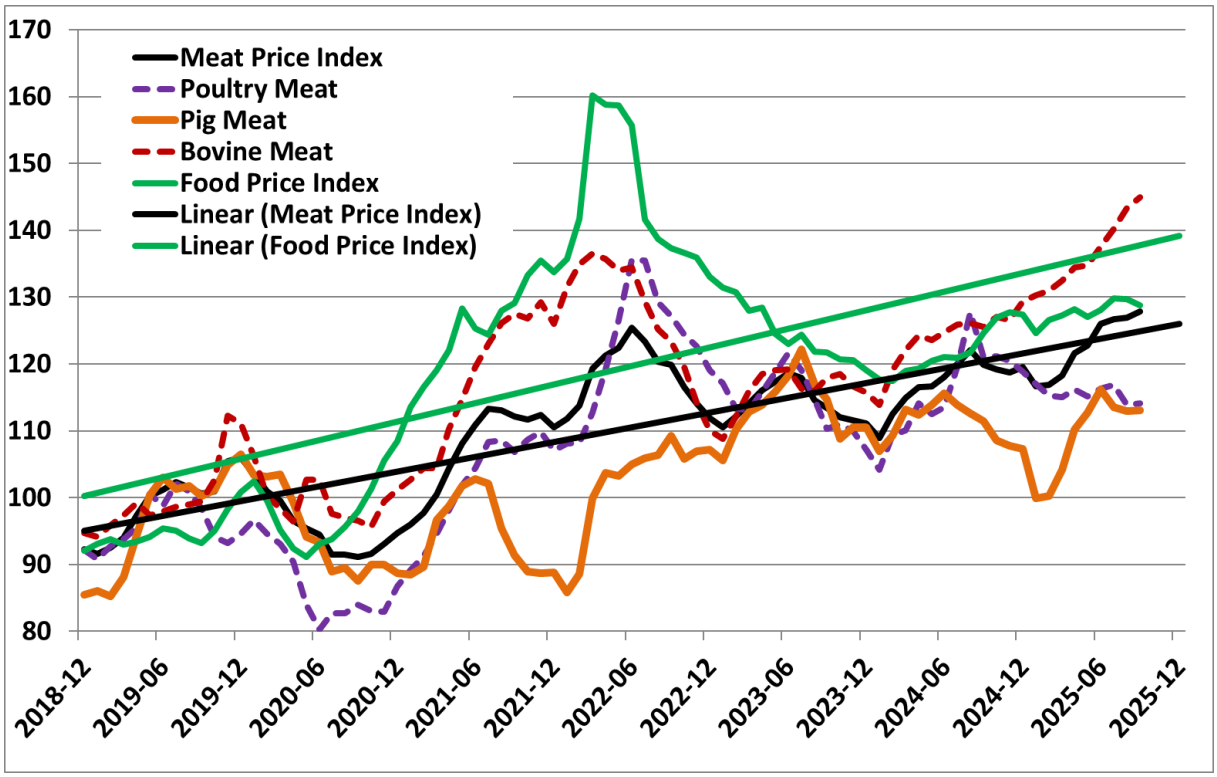
Keywords: Meat production, meat demand, pork, beef, meat consumption, market analysis

1 Highlights of the global meat markets

(Fig. 1 and Tables 1-4):

- While global prices for poultry and pork remain at the level recorded since 2023 despite fluctuations, the price of beef rose to an unprecedented high in 2025 (FAO 2025e) .
- Despite increased demand for poultry meat, the world market price did not rise because production was also expanded in many regions of the world.
- Global pork production remains stable, with declines in production in China, among other places, being offset by expansions for example in the US, Brazil and the EU (FAO 2025b) .
- The global beef market is characterised not only by an enormous increase in prices, but also by strong growth in trade. Imports increased significantly, particularly in the USA and China, while production declined in many countries (Fleischwirtschaft.de 2025b) .
- Longer-term projections of developments are produced by various organisations using macroeconomic computer models. The model results are discussed intensively with market experts in terms of their plausibility and adjusted if necessary (OECD/FAO ongoing) . Globally, the OECD/FAO assume that poultry meat consumption will grow by 21% over the next 10 years up to 2034, beef consumption by 13% and pork consumption by 5% (OECD/FAO 2025) , p. 86.

Figure1 : FAO Food and Meat Price Indices; monthly data (2014-2016 = 100)



Source: (FAO 2025e, 2025d)

Table1 : Meat balances by meat type in world regions (Mill. t cwe)

Region	2013	2023	2024 v/s	2025 s	Δ 2013-2023 (%)	Δ 2023-2024 (%)	Δ 2024-2025 (%)	2013	2023	2024 v/s	2025 s	Δ 2013-2023 (%)	Δ 2023-2024 (%)	Δ 2024-2025 (%)
	Production				**Pork**			*Consumption*						
Africa	1,25	2,1	2,1	2,1	69,1	0,0	0,2	1,4	2,3	2,3	2,3	60,2	0,0	0,3
Asia	65,65	68,9	68,2	68,1	5,0	-1,0	-0,2	64,0	74,0	72,9	72,8	15,7	-1,5	-0,1
Central America	1,47	2,2	2,2	2,3	53,1	-0,4	1,9	2,2	3,7	4,0	4,1	68,5	6,3	2,7
Europe	27,28	28,2	29,0	28,9	3,6	2,6	-0,4	25,7	25,8	26,6	26,6	0,6	3,1	-0,2
Northern America	12,51	14,7	14,9	15,0	17,4	1,4	0,7	9,6	11,4	11,4	11,5	18,6	-0,6	1,1
Oceania	0,50	0,6	0,6	0,6	21,8	0,8	2,8	0,8	0,8	0,9	0,9	8,5	5,3	1,0
South America	5,02	7,9	8,1	8,2	57,8	1,5	2,4	4,3	6,7	6,8	6,8	56,3	1,5	1,2
World	**113,99**	**124,7**	**125,1**	**125,2**	**9,4**	**0,3**	**0,1**	**108,3**	**124,8**	**124,8**	**125,0**	**15,2**	**0,0**	**0,2**
	Production				**Poultry**			*Consumption*						
Africa	5,37	8,0	8,2	8,4	48,2	3,6	1,8	6,9	10,1	10,6	10,8	46,6	4,2	1,8
Asia	40,21	58,8	60,5	61,7	46,2	2,9	2,0	42,2	62,7	64,5	65,6	48,7	2,9	1,8
Europe	18,28	23,0	23,9	24,2	26,1	3,6	1,3	17,4	22,2	22,9	23,2	28,1	3,2	0,9
Northern America	21,34	25,4	25,6	25,8	19,2	0,4	1,0	17,3	21,8	22,3	22,6	26,1	2,3	1,5
Oceania	1,30	1,7	1,8	1,8	30,4	3,7	3,0	1,3	1,7	1,8	1,9	34,2	4,1	2,6
South America	19,42	23,4	23,7	24,2	20,7	1,2	1,9	15,2	18,5	18,7	18,9	21,7	0,9	1,3
World	**110,15**	**146,3**	**149,8**	**152,4**	**32,8**	**2,4**	**1,7**	**105,8**	**145,2**	**149,1**	**151,4**	**37,2**	**2,7**	**1,6**
	Production				**Beef**			*Consumption*						
Africa	6,72	7,3	7,4	7,5	8,3	1,8	0,8	7,0	7,7	7,9	8,0	9,3	3,2	1,1
Asia	17,08	22,2	22,5	22,6	29,9	1,3	0,4	18,5	27,8	28,7	28,8	50,5	3,3	0,2
Central America	2,33	3,0	3,1	3,1	30,4	1,1	1,3	2,3	2,9	3,0	3,0	23,4	4,7	1,0
Europe	10,16	10,0	10,3	10,2	-1,5	3,1	-1,1	11,2	10,1	10,4	10,4	-9,6	3,1	-0,7
Northern America	12,74	13,6	13,6	13,4	7,0	-0,1	-1,9	12,6	13,7	14,1	14,1	8,3	3,0	0,2
Oceania	3,00	3,0	3,3	3,4	-0,6	11,1	1,1	1,0	0,9	0,9	0,8	-11,0	4,2	-7,3
South America	15,69	17,4	18,3	18,0	10,8	5,3	-1,8	13,1	13,2	13,4	12,9	1,1	1,0	-3,3
World	**67,95**	**76,5**	**78,5**	**78,0**	**12,6**	**2,6**	**-0,6**	**66,0**	**76,3**	**78,5**	**78,1**	**15,6**	**2,9**	**-0,5**
	Import				**Pork**			*Export*						
Africa	0,25	0,2	0,2	0,2	-25,4	0,0	1,6	0,0	0,0	0,0	0,0	-43,3	11,8	0,0
Asia	3,37	5,2	4,9	4,9	54,8	-6,8	0,0	0,5	0,1	0,2	0,2	-71,5	10,4	5,7
Central America	0,81	1,7	2,0	2,0	114,7	12,5	2,7	0,2	0,3	0,2	0,2	70,6	-10,3	-4,3
Europe	8,78	1,1	1,1	1,1	-87,2	-2,0	3,4	10,2	3,5	3,5	3,4	-65,2	-2,1	-0,7
Northern America	0,74	0,9	0,9	0,8	17,4	-1,3	-5,3	3,6	4,1	4,4	4,3	15,3	6,2	-1,6
Oceania	0,32	0,3	0,3	0,3	-14,4	15,0	0,0	0,0	0,0	0,0	0,1	9,1	2,1	20,4
South America	0,21	0,4	0,5	0,5	93,4	24,3	4,9	0,9	1,7	1,8	2,0	83,3	7,0	7,9
World	**14,57**	**9,8**	**9,8**	**9,9**	**-32,6**	**-0,3**	**0,7**	**15,4**	**9,8**	**10,1**	**10,2**	**-36,3**	**3,0**	**0,6**
	Import				**Poultry**			*Export*						
Africa	1,57	2,3	2,4	2,5	45,0	5,7	1,8	0,1	0,1	0,1	0,1	44,3	-5,7	4,8
Asia	6,18	7,5	7,7	7,8	20,8	3,2	0,9	2,5	3,5	3,7	3,9	38,3	7,7	3,3
Central America	0,99	2,1	2,1	2,2	110,8	1,7	4,3	0,0	0,0	0,0	0,0	39,3	10,3	4,7
Europe	4,80	2,4	2,5	2,5	-50,4	5,3	-1,2	5,2	3,2	3,4	3,5	-38,9	7,5	2,3
Northern America	0,32	0,4	0,4	0,4	26,9	5,4	-0,7	4,3	4,1	3,7	3,6	-5,0	-8,4	-3,1
Oceania	0,08	0,1	0,1	0,1	43,9	5,9	-4,0	0,1	0,1	0,1	0,1	39,2	-1,4	-1,4
South America	0,48	0,3	0,4	0,5	-27,1	28,7	4,2	4,4	5,3	5,5	5,7	20,1	3,9	4,0
World	**14,84**	**15,1**	**15,8**	**15,9**	**1,7**	**4,4**	**1,2**	**16,6**	**16,2**	**16,6**	**16,9**	**-2,1**	**2,3**	**1,9**
	Import				**Beef**			*Export*						
Africa	0,58	0,5	0,6	0,7	-15,3	28,5	6,3	0,1	0,1	0,1	0,1	-33,0	31,5	8,3
Asia	3,41	7,3	8,0	8,0	114,6	9,1	0,6	2,0	1,7	1,7	1,8	-11,1	-1,0	3,6
Central America	0,25	0,4	0,4	0,5	39,0	25,2	3,4	0,3	0,5	0,5	0,5	87,1	-2,1	4,7
Europe	4,11	1,1	1,1	1,2	-74,2	7,3	2,9	3,1	1,0	1,0	1,0	-69,2	7,1	-1,1
Northern America	1,44	1,8	2,3	2,4	27,0	24,2	7,2	1,6	1,8	1,8	1,7	16,2	-1,2	-7,4
Oceania	0,05	0,0	0,0	0,0	-9,3	-4,1	-2,1	2,1	2,2	2,5	2,6	4,2	13,5	4,1
South America	0,56	0,5	0,5	0,5	-15,2	10,5	3,8	2,8	4,6	5,4	5,6	65,2	18,0	2,4
World	**10,46**	**11,6**	**13,0**	**13,3**	**10,5**	**12,6**	**2,4**	**11,9**	**11,9**	**13,1**	**13,2**	**-0,2**	**9,8**	**1,4**

Source: (FAO lfd, 2025a, 2025b)

Table 2 highlights the enormous importance of Asia. This is not surprising given Asia's large share of the global population. On the other hand, however, it also emphasizes the low production and low consumption in Africa. In

some regions of Africa, sufficient food and protein supplies are not guaranteed for a significant proportion of the population (FAO 2025c) . Table 3 also describes deficits and surpluses. It is clear that global production and consumption are by no means balanced, which means that international trade is of great importance. After all, more than 10% of global production/consumption is traded internationally (Table 4).

Table2 : Meat balances in the world regions

Region	2013	2023	2024 pre/est	2025 est	Δ 2013-2023 (%)	Δ 2023-2024 (%)	Δ 2024-2025 (%)	2013	2023	2024 pre/est	2025 est	Δ 2013-2023 (%)	Δ 2023-2024 (%)	Δ 2024-2025 (%)
	Production							Consumption						
Africa	13,3	17,3	17,8	18,0	30,1	2,4	1,2	15,4	20,1	20,8	21,1	30,8	3,3	1,4
Asia	122,9	149,9	151,2	152,4	21,9	0,9	0,8	124,6	164,5	166,1	167,2	32,0	0,9	0,7
Central America	7,5	11,3	11,5	11,7	50,2	1,8	1,9	9,2	14,6	15,2	15,6	58,3	4,0	2,4
Europe	55,7	61,3	63,2	63,3	10,0	3,1	0,1	54,2	58,2	60,0	60,1	7,3	3,1	0,1
Northern America	46,6	53,7	54,0	54,2	15,4	0,6	0,2	39,6	46,9	47,8	48,3	18,6	1,8	1,0
Oceania	4,8	5,3	5,7	5,8	10,1	7,6	1,8	3,0	3,4	3,6	3,6	13,2	4,4	-0,3
South America	40,1	48,7	50,1	50,4	21,5	2,7	0,6	32,6	38,4	38,8	38,7	17,9	1,1	-0,3
World	**292,1**	**347,6**	**353,4**	**355,6**	**19,0**	**1,7**	**0,6**	**280,2**	**346,2**	**352,3**	**354,5**	**23,6**	**1,7**	**0,6**

Source: (FAO lfd, 2025a, 2025b)

Table3 : Meat surpluses and deficits in the world regions

Region	2013	2023	2024 p/e	2025 est	2013 (%)	2023 (%)	2024 (%)	2025 (%)
	Surplus/Deficit (Mill. t cwe)				Calculated Self-Suffiency Rate			
Africa	**-2,0**	**-2,8**	**-3,0**	**-3,1**	**87**	**86**	**85**	**85**
Asia	**-1,7**	**-14,7**	**-14,9**	**-14,9**	**99**	**91**	**91**	**91**
Central America	**-1,7**	**-3,4**	**-3,7**	**-3,9**	**81**	**77**	**75**	**75**
Europe	**1,5**	**3,1**	**3,2**	**3,2**	**103**	**105**	**105**	**105**
Northern America	**7,0**	**6,8**	**6,3**	**5,9**	**118**	**115**	**113**	**112**
Oceania	**1,8**	**1,8**	**2,1**	**2,2**	**158**	**154**	**158**	**162**
South America	**7,6**	**10,4**	**11,3**	**11,7**	**123**	**127**	**129**	**130**
World	**11,9**	**1,4**	**1,2**	**1,1**	**104**	**100**	**100**	**100**

Source: (FAO lfd, 2025a, 2025b)

Table4 : Global meat export and import shares

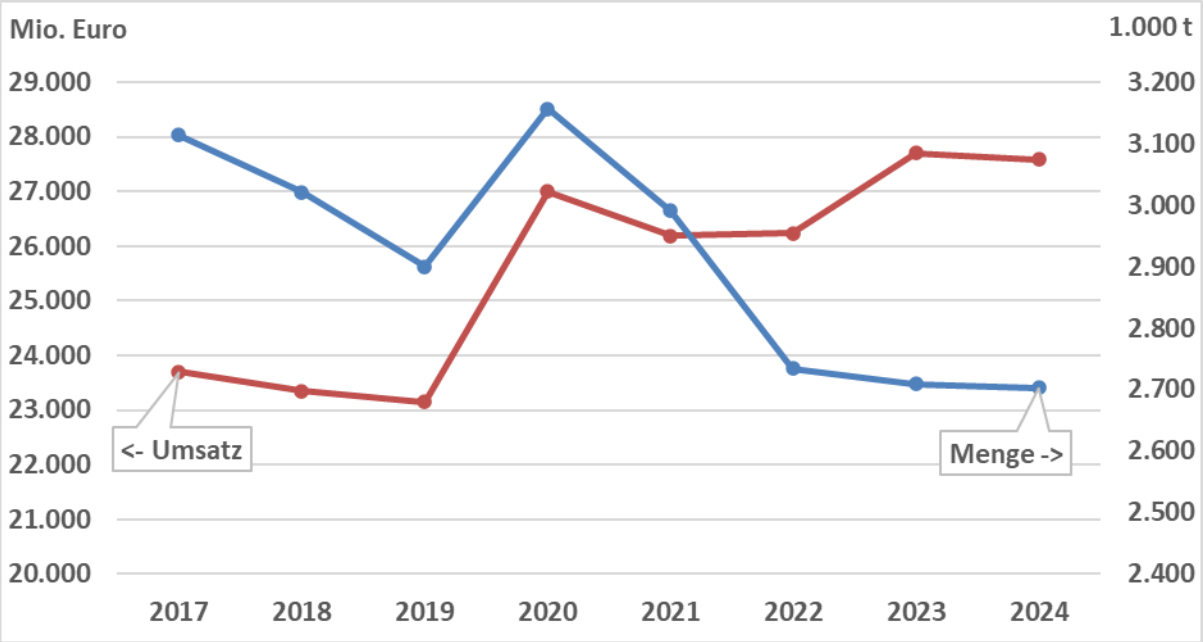
World	2013	2023	2024 pre/est	2025 est	Δ 2013-2023 (%)	Δ 2023-2024 (%)	Δ 2024-2025 (%)
Production	292,1	347,6	353,4	355,6	**19,0**	**1,7**	**0,6**
Export	43,9	37,9	39,8	40,3	**-13,6**	**4,8**	**1,4**
Export Share of Production	15%	11%	11%	11%	-27,4	3,1	0,7
Consumption	280,2	346,2	352,3	354,5	**23,6**	**1,7**	**0,6**
Import	39,9	36,5	38,6	39,1	**-8,5**	**5,7**	**1,5**
Import Share of Consumption	14%	11%	11%	11%	-26,0	3,9	0,8

Source: (FAO ongoing, 2025a, 2025b)

2 The German Meat Market

Figure 2 highlights two significant societal changes in the recent past: in 2020, lockdowns imposed to combat the coronavirus pandemic led to a temporary decline in out-of-home consumption. This caused a sharp rise in private household purchases, including purchases of meat, meat products, sausages and poultry. The impact of inflation due to energy supply bottlenecks triggered by Russia's war against Ukraine is evident in the decline in purchase volumes despite growing turnover.

Figure2 : Private household purchases of meat and meat products, including poultry



Source: (AMI GmbH ongoing b) [AMI based on Yougov Shopper Panel] own calculations

Another effect is not only a decline in consumer spending, but also a shift towards cheaper products (see Table 5). Comparing 2020 and 2024, there was significantly less demand for higher-priced meats such as beef and pork, and only slightly less demand for cheaper poultry or mixed beef/pork, i.e. minced meat.

Discounters and hypermarkets also benefited in terms of shopping locations (Table 5). They offer meat and meat products at lower prices than other marketing channels (Table 6).

Until 2021, i.e. until inflation flared up, organic meat and meat products recorded strong growth. Since then, demand has stagnated while turnover has continued to rise due to increasing product prices in this segment.

Until 2022 demand for meat substitutes also rose sharply in private household purchases. Since then, both volume and sales in this segment have stagnated. Since 2023, there have on average been no price increases (Table 6). It is currently unclear to what extent meat substitutes will become cheaper than meat products in the future. If this is the case, it is quite possible that these product categories will gain additional market share.

The latest development, comparing the changes between 2023 and 2024 or the changes in the first half of 2024 and 2025, indicates a diminishing consumer reluctance.

Table5 : Meat, Meat Products and Meat Substitute Purchases by Private Households

AMI according to YouGov Shopper Panel	1.000 t product weight					%			Mill. Euro					%		
	2020	2021	2022	2023	2024	2023 → 2024	1. Hj. 24 → 1. Hj. 25	2020 → 2024	Jahr 2020	Jahr 2021	Jahr 2022	Jahr 2023	Jahr 2024	2023 → 2024	1. Hj. 24 → 1. Hj. 25	2020 → 2024
Total Meat	**1.156**	**1.088**	**958**	**925**	**913**	-1%	-3%	-21%	**9.367**	**9.000**	**8.634**	**8.906**	**8.986**	+1%	+2%	-4%
Beef	324	313	255	247	258	+4%	-11%	-20%	3.217	3.166	2.927	3.009	3.212	+7%	+1%	-0%
Pork	592	554	506	470	455	-3%	+1%	-23%	4.214	3.945	3.854	3.880	3.828	-1%	+1%	-9%
Minced Meat (Pork/Beef)	182	168	157	164	164	+0%	-3%	-10%	1.121	1.079	1.232	1.340	1.357	+1%	+5%	+21%
Veal/Lamb/Other Meat	58	54	40	43	36	-17%	+7%	-37%	815	810	621	677	589	-13%	+8%	-28%
Meat Products	**1.460**	**1.389**	**1.317**	**1.312**	**1.291**	-2%	+0%	-12%	**14.429**	**13.956**	**14.198**	**15.070**	**14.790**	-2%	-0%	+3%
Poultry Meat	**540**	**513**	**459**	**472**	**499**	+6%	+2%	-8%	**3.202**	**3.229**	**3.408**	**3.725**	**3.814**	+2%	+6%	+19%
Total Organic Meat	**83**	**96**	**88**	**89**	**90**	+2%		+8%	**1095**	**1267**	**1272**	**1315**	**1362**	+4%		+24%
Share of Total Organic Meat in Total Meat	2,6%	3,2%	3,2%	3,3%	3,3%	+2%		+26%	4,1%	4,8%	4,8%	4,7%	4,9%	+4%		+22%
Meat Substitutes	**49**	**65**	**72**	**70**	**73**	+4%	-2%	+49%	**552**	**751**	**837**	**847**	**876**	+3%	-2%	+59%
Share of Meat Substitutes in Total Meat	**1,6%**	**2,2%**	**2,6%**	**2,6%**	**2,7%**	+5%	-2%	+74%	**2,0%**	**2,9%**	**3,2%**	**3,1%**	**3,2%**	+4%	-3%	+55%
Total Meat/Meat Products/Sausages/Poultry	**3.156**	**2.991**	**2.734**	**2.709**	**2.703**	-0,2%	-0,6%	-14%	**26.998**	**26.185**	**26.240**	**27.700**	**27.590**	-0,4%	+1,4%	+2%
Discount	**1.285**	**1.190**	**1.134**	**1.163**	**1.188**	+2,1%	+1,1%	-8%	**9.101**	**8.686**	**9.646**	**10.397**	**10.462**	+0,6%	+2,6%	+15%
Hypermarkets	**449**	**415**	**369**	**356**	**349**	-1,8%	-2,2%	-22%	**3.287**	**3.065**	**3.024**	**3.163**	**3.133**	-0,9%	-1,3%	-5%
Food-Full-Range Provider	**844**	**829**	**766**	**749**	**750**	+0,2%	-3,1%	-11%	**8.070**	**8.134**	**8.115**	**8.535**	**8.657**	+1,4%	+0,1%	+7%
Butcheries	**395**	**371**	**308**	**299**	**270**	-9,8%	+0,7%	-32%	**4.667**	**4.378**	**3.783**	**3.953**	**3.621**	-8,4%	+2,6%	-22%
Other Shopping Facilities	**183**	**186**	**156**	**142**	**146**	+2,4%	+0,7%	-20%	**1.873**	**1.922**	**1.672**	**1.653**	**1.717**	+3,9%	+2,9%	-8%

Source: (AMI GmbH ongoing b) [AMI based on Yougov Shopper Panel] own calculations

Table6 : Average value of purchases by private households

AMI according to YouGov Shopper Panel	Average Value (Euro/kg)										
	2017	2018	2019	2020	2021	2022	2023	2024	1. Hj. 2023	1. Hj. 2024	1. Hj. 2025
Total Meat	**7,04**	**7,16**	**7,39**	**8,10**	**8,27**	**9,02**	**9,63**	**9,84**	**9,43**	**9,61**	**10,11**
Beef	**9,22**	**9,41**	**9,49**	**9,92**	**10,13**	**11,49**	**12,17**	**12,45**	**11,99**	**12,12**	**13,66**
Pork	**6,11**	**6,15**	**6,37**	**7,11**	**7,12**	**7,61**	**8,25**	**8,41**	**8,10**	**8,33**	**8,38**
Minced Meat (Pork/Beef)	**5,21**	**5,30**	**5,50**	**6,16**	**6,43**	**7,86**	**8,16**	**8,26**	**8,12**	**8,09**	**8,82**
Veal/Lamb/Other Meat	**13,47**	**13,65**	**14,22**	**14,11**	**14,99**	**15,58**	**15,60**	**16,29**	**15,17**	**15,92**	**16,09**
Meat Products	**8,74**	**8,85**	**9,18**	**9,88**	**10,05**	**10,78**	**11,48**	**11,46**	**11,35**	**11,44**	**11,40**
Poultry Meat	**5,44**	**5,59**	**5,72**	**5,93**	**6,29**	**7,42**	**7,90**	**7,64**	**7,90**	**7,59**	**7,88**
Total Organic Meat	**13,21**	**13,24**	**13,35**	**13,14**	**13,26**	**14,42**	**14,85**	**15,12**	**14,92**	**14,98**	
Meat Substitutes				**11,27**	**11,56**	**11,63**	**12,09**	**11,98**	**11,96**	**11,97**	**12,04**
Total Meat/Meat Products/Sausages/Poultry	**7,61**	**7,73**	**7,98**	**8,55**	**8,76**	**9,60**	**10,23**	**10,21**	**10,11**	**10,12**	**10,32**
Discount	**6,30**	**6,44**	**6,62**	**7,08**	**7,30**	**8,50**	**8,94**	**8,81**	**8,88**	**8,79**	**8,91**
Hypermarkets	**6,55**	**6,73**	**6,95**	**7,31**	**7,39**	**8,18**	**8,89**	**8,97**	**8,78**	**8,89**	**8,97**
Food-Full-Range Provider	**8,22**	**8,43**	**8,85**	**9,56**	**9,81**	**10,59**	**11,40**	**11,54**	**11,26**	**11,41**	**11,79**
Butcheries	**10,81**	**11,04**	**11,43**	**11,80**	**11,80**	**12,30**	**13,20**	**13,40**	**12,98**	**13,33**	**13,59**
Other Shopping Facilities	**9,34**	**9,32**	**9,83**	**10,26**	**10,33**	**10,70**	**11,60**	**11,77**	**11,43**	**11,57**	**11,81**

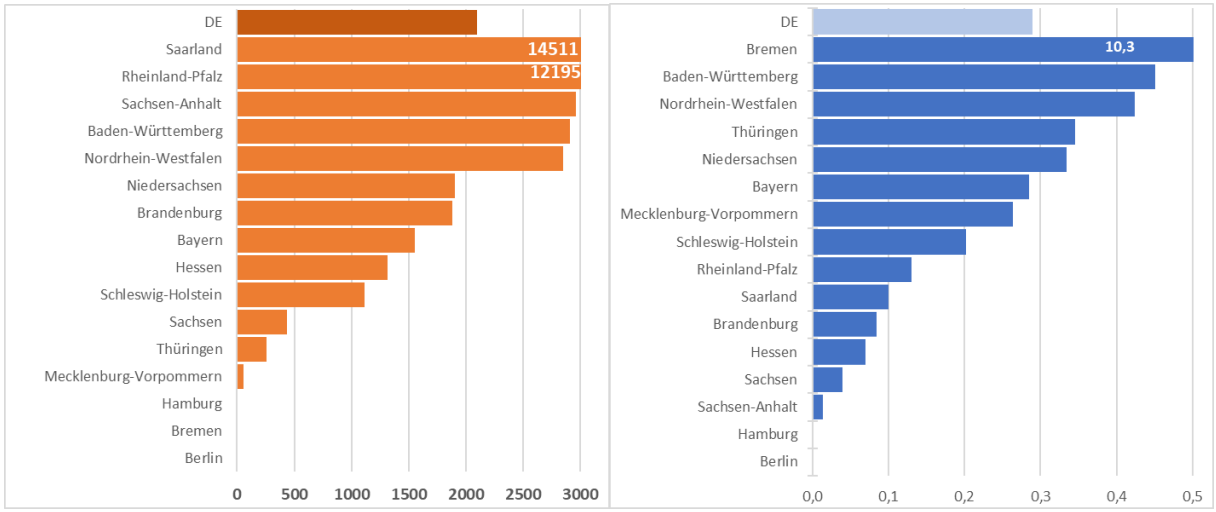
Source: (AMI GmbH ongoing b) [based on GfK household panel], own calculations)

There is an increasing concentration process taking place at the level of slaughter and meat processing. The decline in slaughtering is forcing this development (see, for example, (Lehmann 2024)). While 59.4 million pigs were slaughtered in 2016, this figure fell to just 44.4 million in 2024, representing a decline of 15 million or 25%. In 2016, 3.26 million large cattle were slaughtered, while in 2024 the figure was 2.72 million, representing a decline of 540,000 or 17% in slaughtering (Statistisches Bundesamt ongoing b) . However, consolidation did not proceed evenly across all companies. According to the ISN slaughterhouse ranking, the 10 largest pig slaughtering companies slaughtered approximately 44.2 million pigs in 2018 and 36.3 million in 2023. This represents a decline of 18% and increased the market share of the 10 largest slaughterhouses from 74% in 2016 to 82% in 2023. The decline was obviously greater among smaller slaughterhouses and/or the takeover of smaller companies by larger companies led to the smaller decline among the top 10 companies (Lz 2020; Editorial LZ 2024) .

The concentration process is also associated with regional concentration and the resulting lack of sufficient slaughter facilities in other regions. Fig. 3 provides a rough estimate, showing that slaughter rates in a federal state vary greatly depending on the livestock population there. This leads to discussions as to whether livestock farmers in some regions still have sufficient sales opportunities for their animals ready for slaughter.

Figure3 : Number of Slaughters per Livestock Population in 2024

Slaughterings per pig (pig population) in 2024 Slaughterings per bovine animal (cattle population) in 2024

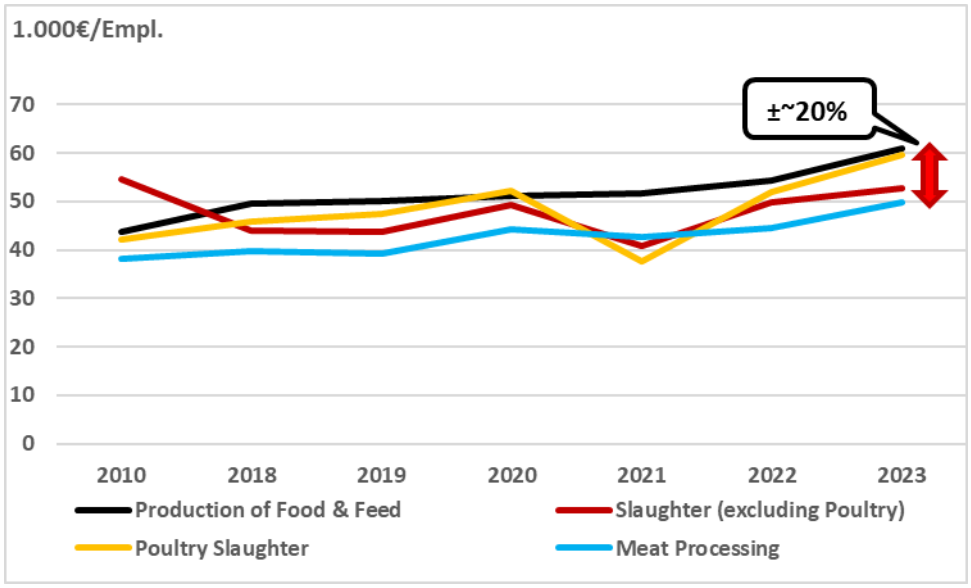


Source: (Statistisches Bundesamt, ongoing b)

There has also been a huge consolidation process in meat processing in recent years. In 2019, the second and third largest sausage manufacturers in the national ranking, Kemper and Reinert, merged (Lenders 2019) . Further mergers, takeovers and investments are currently being discussed (Fleischwirtschaft.de 2025a) . Meat processing companies without their own slaughterhouses come under financial pressure, especially in phases with high slaughter animal prices, as they cannot always pass on the rising raw material costs to their customers, i.e. usually food retailers, so that in such cases margins decline or even losses have to be accepted. For this reason, reports of plant closures, consolidation processes and mergers are becoming more frequent, especially during periods of high prices at producer level (see also (Fleischwirtschaft.de 2023; Marco Kitzmann 2023)).

Fig. 4 shows that meat processing in particular has low labour productivity. One reason for this may well be high input costs, which reduce value added when there are limited opportunities to adjust the value of products. In any case, the low GVA per employee indicates only limited potential for productivity-enhancing investments.

Figure4 : Gross value added per employee



Source: (Statistisches Bundesamt, ongoing c)

3 The German Market for Beef; Cattle Population until May 2025

(Table 7 and Figures 5–11):

- Over the past 10 years, the number of dairy farms has fallen by more than a third, from 75,000 to 48,000; as a result, structural change in dairy farming continues unabated. The decline tends to be more pronounced in the western federal states.
- The dairy cow stocks have somewhat declined further over the past two years. The decline is more pronounced in the eastern federal states, with the result that there has been no increase in average stocks.
- Over the past 10 years, the dairy cow herd has shrunk by more than 700,000 cows, or 17%. Accordingly, fewer calves are being born, which also reduces the basis for cattle fattening.
- In suckler cow farming, new farms have been added for the fourth year in a row, while the herd size tends to stagnate. These may well be hobby farms with two or three cattle, as indicated by the decline in average herd sizes.

Table7 : Cattle Population in May 2025

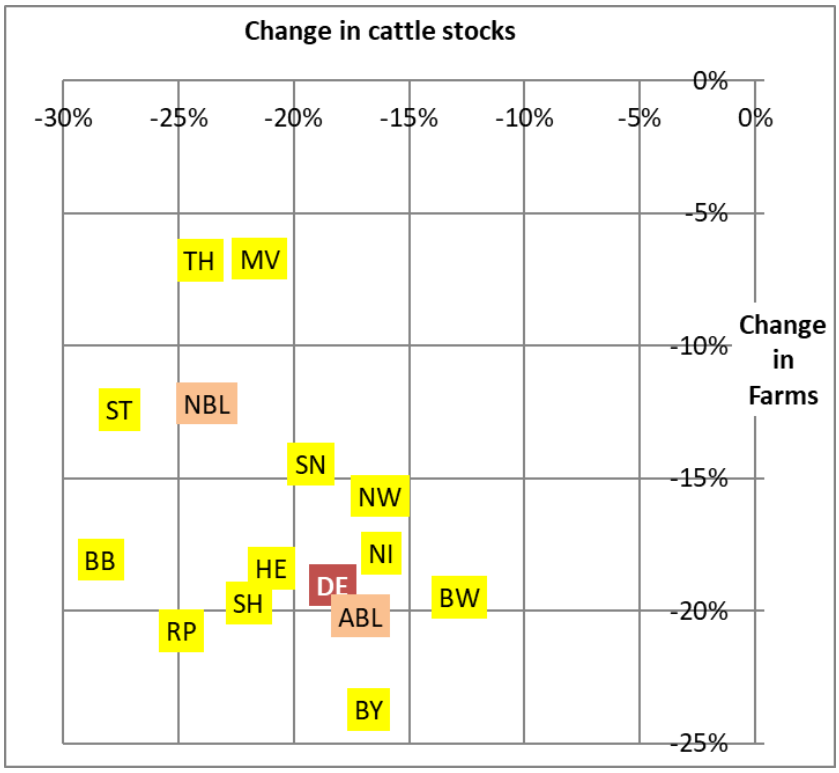
	May Census	Farms			Livestock			Average Herd Size		
		with Cattle	of which: with Dairy-cows	of which: with other cows	Cattle	Dairy-cows	Other cows	Cattle	Dairy-cows	Other cows
Germany		Amount						Number per Farm		
	2015	*151.365*	*74.762*	*50.557*	*12.653.071*	*4.286.651*	*682.014*	*84*	*57*	*13*
	2022	128.523	53.677	49.100	10.986.304	3.817.321	612.407	85	71	12
	2023	126.592	51.674	49.792	10.936.798	3.775.191	623.390	86	73	13
	2024	124.585	49.452	50.354	10.626.827	3.668.290	628.393	85	74	12
	2025	122.567	47.719	50.689	10.335.327	3.578.405	621.116	84	75	12
		Change (%)								
	23 to 22	-1,5	-3,7	1,4	-0,5	-1,1	1,8	1,1	2,7	0,4
	24 to 23	-1,6	-4,3	1,1	-2,8	-2,8	0,8	-1,3	1,5	-0,3
	25 to 24	-1,6	-3,5	0,7	-2,7	-2,5	-1,2	-1,1	1,1	-1,8
	25 to 15	-19,0	-36,2	0,3	-18,3	-16,5	-8,9	0,9	30,8	-9,2
	25 to 15*)	-2,1	-4,4	0,0	-2,0	-1,8	-0,9	0,1	2,7	-1,0
	***) = annual growth rate**									
Former Federal Territory (incl. Berlin)		Amount						Number per Farm		
	2015	*129.344*	*70.587*	*38.225*	*10.323.085*	*3.504.938*	*409.777*	*80*	*50*	*11*
	2022	108.438	50.421	36.613	9.076.004	3.175.806	372.457	84	63	10
	2023	106.571	48.482	37.102	9.044.321	3.145.241	383.506	85	65	10
	2024	104.834	46.364	37.593	8.789.933	3.059.936	391.114	84	66	10
	2025	103.226	44.703	37.899	8.558.990	2.983.590	390.327	83	67	10
		Change (%)								
	23 to 22	-1,7	-3,8	1,3	-0,3	-1,0	3,0	1,4	3,0	1,6
	24 to 23	-1,6	-4,4	1,3	-2,8	-2,7	2,0	-1,2	1,7	0,7
	25 to 24	-1,5	-3,6	0,8	-2,6	-2,5	-0,2	-1,1	1,1	-1,0
	25 to 15	-20,2	-36,7	-0,9	-17,1	-14,9	-4,7	3,9	34,4	-3,9
New Federal States (excl. Berlin)		Amount						Number per Farm		
	2015	*22.021*	*4.175*	*12.332*	*2.329.986*	*781.713*	*272.237*	*106*	*187*	*22*
	2022	20.085	3.256	12.487	1.910.300	641.515	239.950	95	197	19
	2023	20.021	3.192	12.690	1.892.477	629.950	239.884	95	197	19
	2024	19.751	3.088	12.761	1.836.894	608.354	237.279	93	197	19
	2025	19.341	3.016	12.790	1.776.337	594.815	230.789	92	197	18
		Change (%)								
	23 to 22	-0,3	-2,0	1,6	-0,9	-1,8	-0,0	-0,6	0,2	-1,6
	24 to 23	-1,3	-3,3	0,6	-2,9	-3,4	-1,1	-1,6	-0,2	-1,6
	25 to 24	-2,1	-2,3	0,2	-3,3	-2,2	-2,7	-1,2	0,1	-3,0
	25 to 15	-12,2	-27,8	3,7	-23,8	-23,9	-15,2	-13,2	5,3	-18,3

Source: (Statistisches Bundesamt, ongoing b) , own calculations

Figures 5 to 8 below show the development of livestock numbers and farms in cattle and dairy farming. It is striking that the decline in farms is less pronounced in the eastern federal states than in the western federal states, while

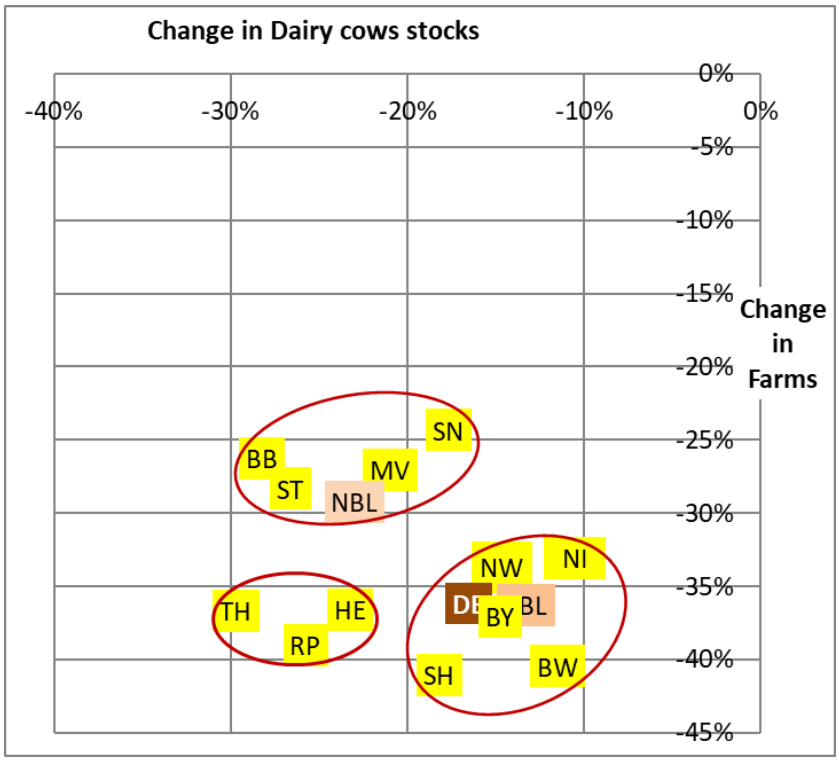
the decline in livestock numbers is less pronounced in the western federal states. As in the previous two years, the number of farms and dairy herds in Schleswig-Holstein is declining at an above-average rate, with the result that one in five dairy farms there has been abandoned since 2023.

Figure5 : Development of Cattle Stocks and Cattle Farms in the Federal States*) May 15 → May 25 in %



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

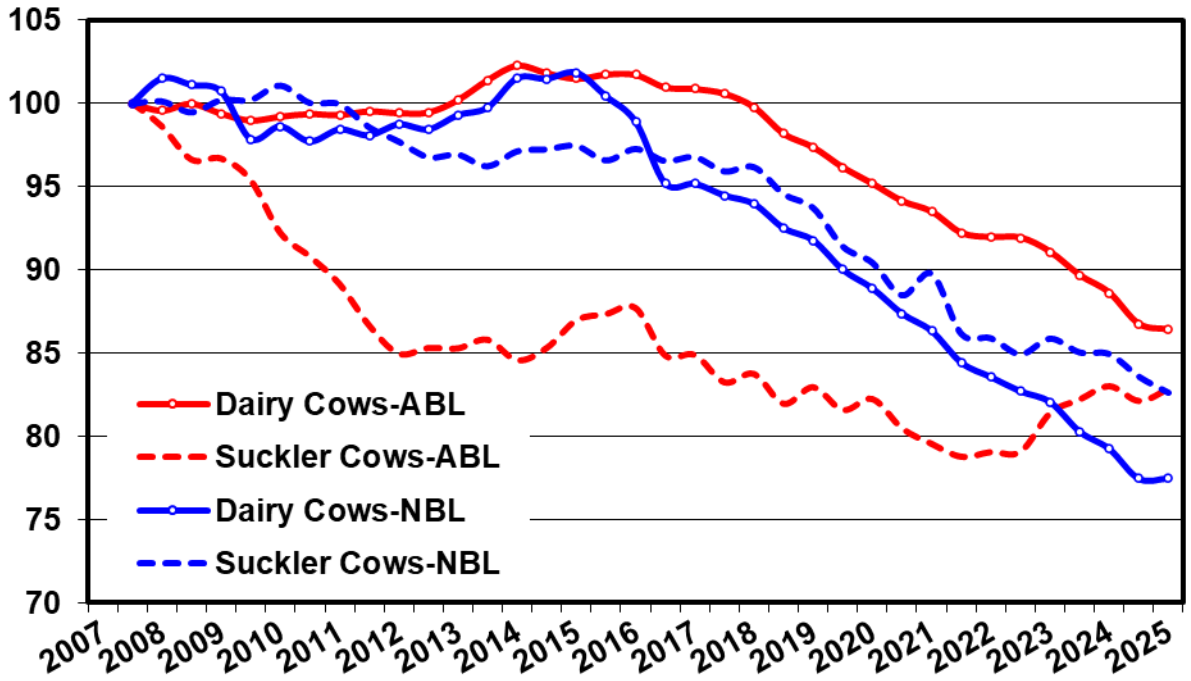
Figure6 : Development of Dairy Cow Stocks and Dairiy Farms in the Federal States May 15 → May 25 in %



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

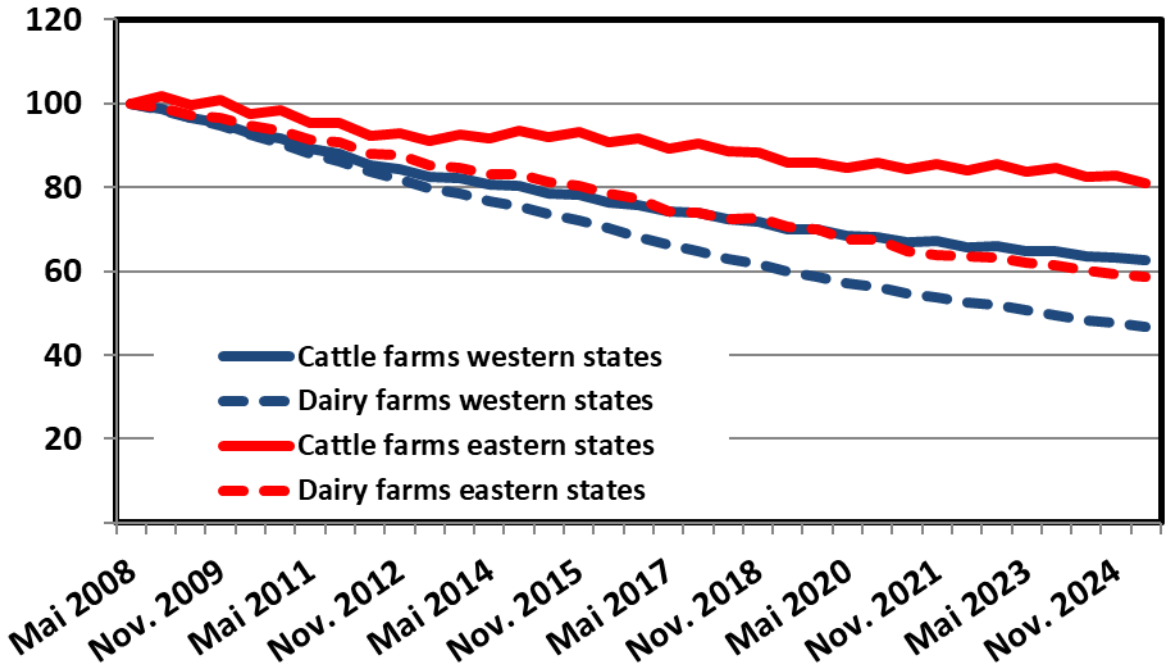
Figures 7 & 8 clearly show that this is a rather continuous process of structural change.

Figure7 : Development of Cattle and Dairy Cow Stocks until May 2025 (2007 = 100)



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

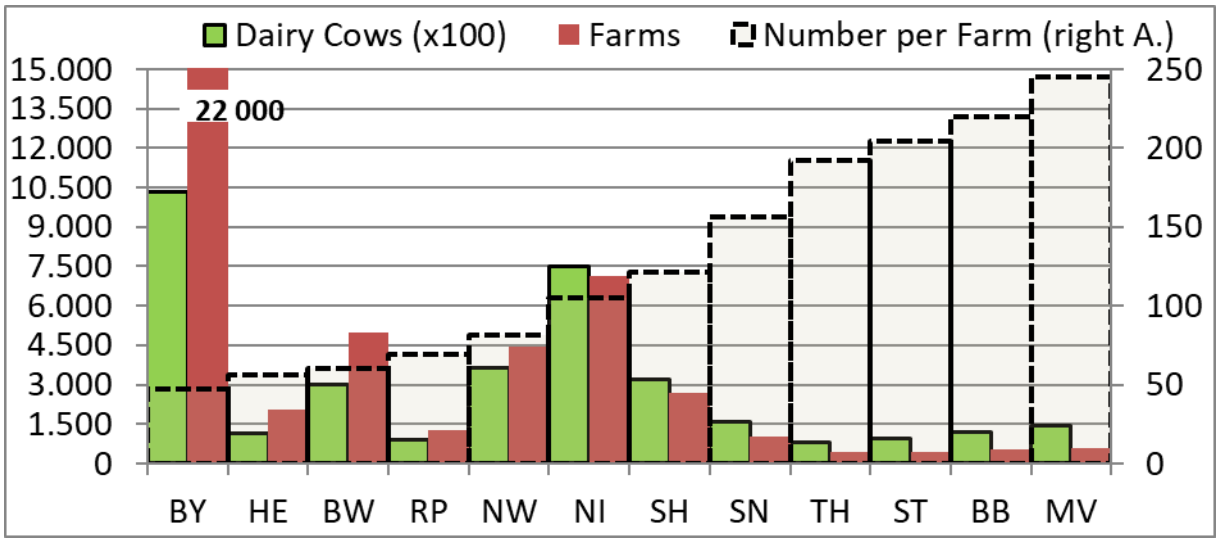
Figure8 : Development of Cattle and Dairy Cow Farming until May 2025 (May 2008 = 100)



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

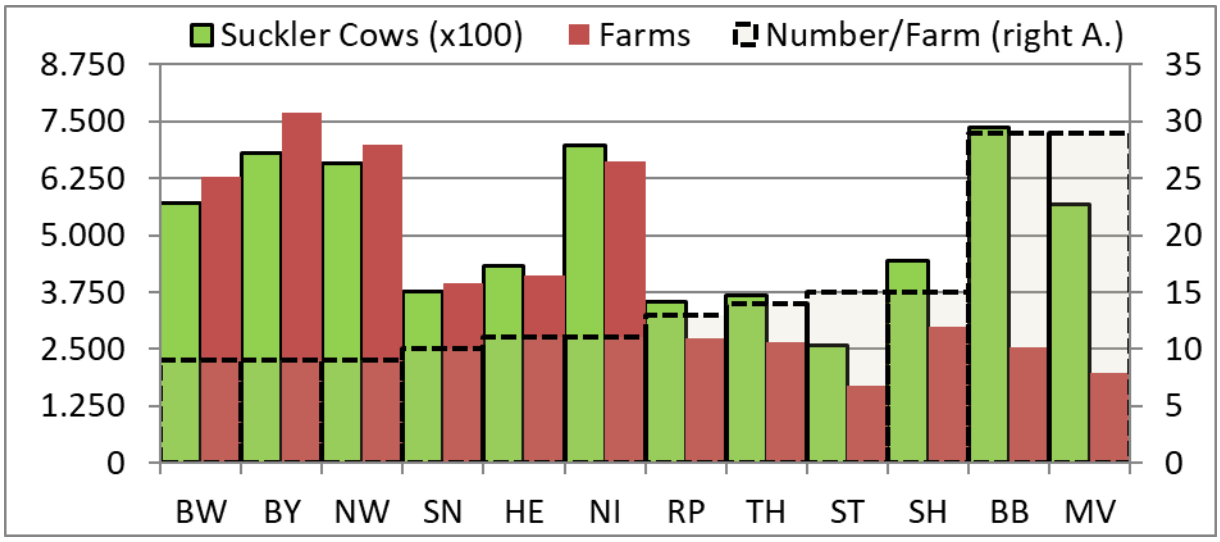
Fig. 9 shows the different average farm structures in dairy farming in Germany. In contrast, suckler cow farming is less heterogeneous (Fig. 10). The low average herd size per farm indicates that hobby farming plays a significant role here.

Figure9 : Structure of Dairy Farming in the Federal States (May 2025)



Source: (Statistisches Bundesamt, ongoing b)

Figure10 : Structure of Suckler Cow Farming in the Federal States (May 2025)



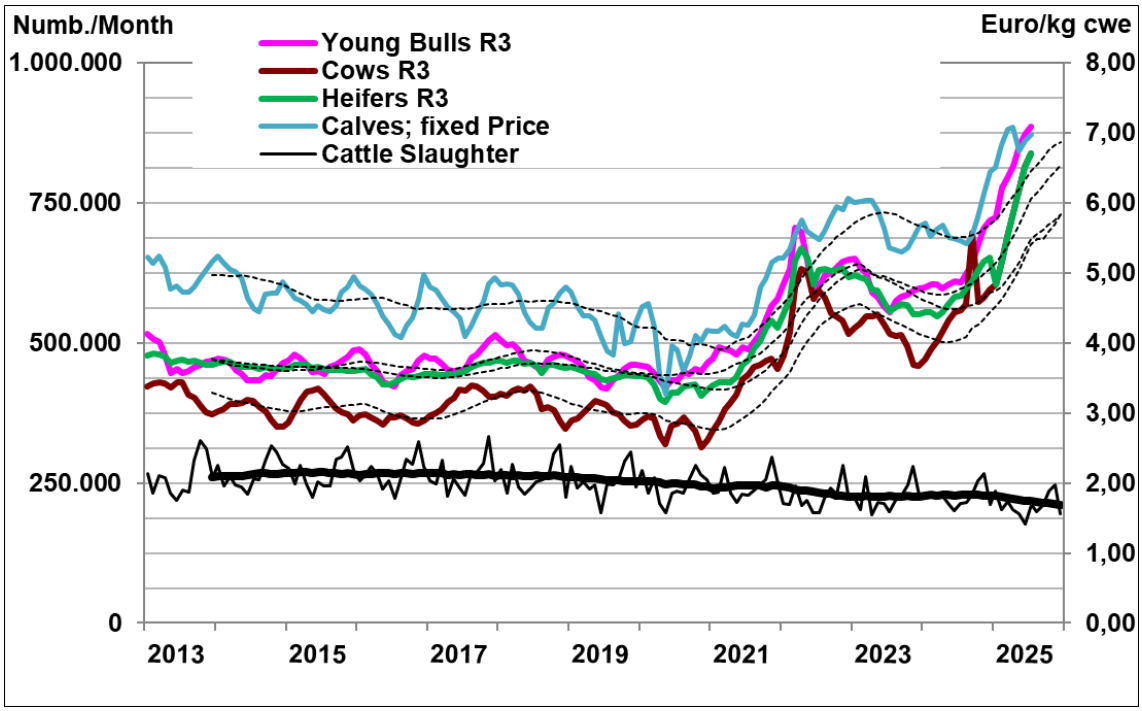
Source: (Statistisches Bundesamt, ongoing b)

4 Beef: Slaughtering and Producer Prices

(Figs. 11-15):

In addition to the parallel price development of cows, heifers, bulls and calves, Fig. 11 shows the exceptional high price phase. This is due to both domestic conditions (shortage of livestock) and strong international demand for beef (especially from China and the USA) combined with a shortage of supply in some parts of the world (see, for example, (Fleischwirtschaft.com 2024; Hans-Wilhelm Windhorst 2025) . At the same time, the following figures clearly show that domestic beef production has not responded to price developments with increased production. Obviously, production conditions and cost structures do not allow for any noticeable expansion. In addition, cattle farming in Germany is dominated by milk production, and dairy breeds are simply less suitable for targeted beef production.

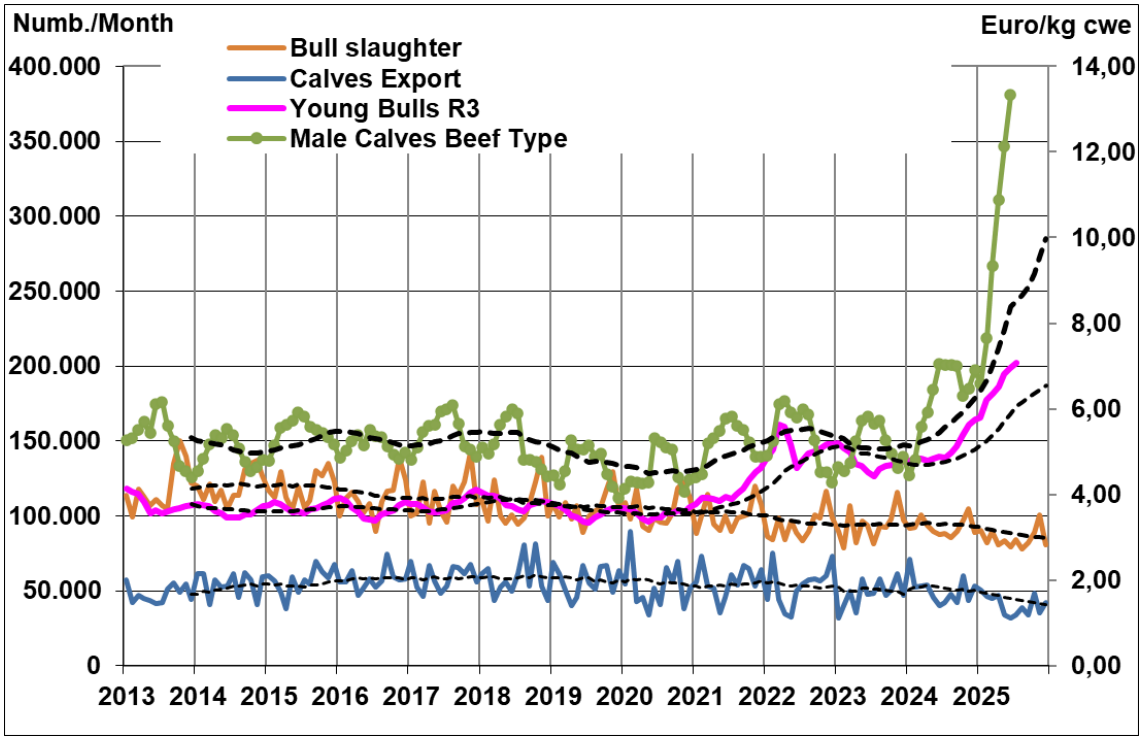
Figure11 : Selected Cattle and Calf Prices (and 12-month moving average)



Source: (AMI GmbH ongoing c; BMEL 2025)

Fig. 12 shows that, despite high producer prices, not only is bull slaughtering declining, but large quantities of calves continue to be exported, primarily to the Netherlands to specialised calf fattening farms. What is striking and surprising in its magnitude is the price development of meat-oriented bull calves, which are reaching unprecedented levels.

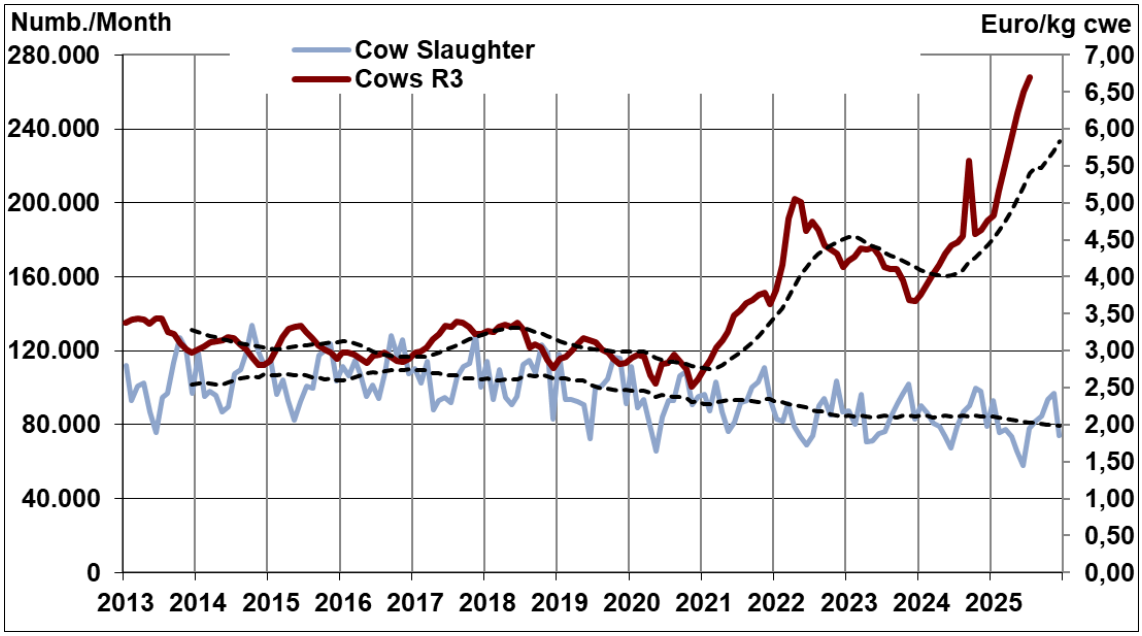
Figure12 : Slaughterings, Prices of Young Bulls (and 12-month moving average)



Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

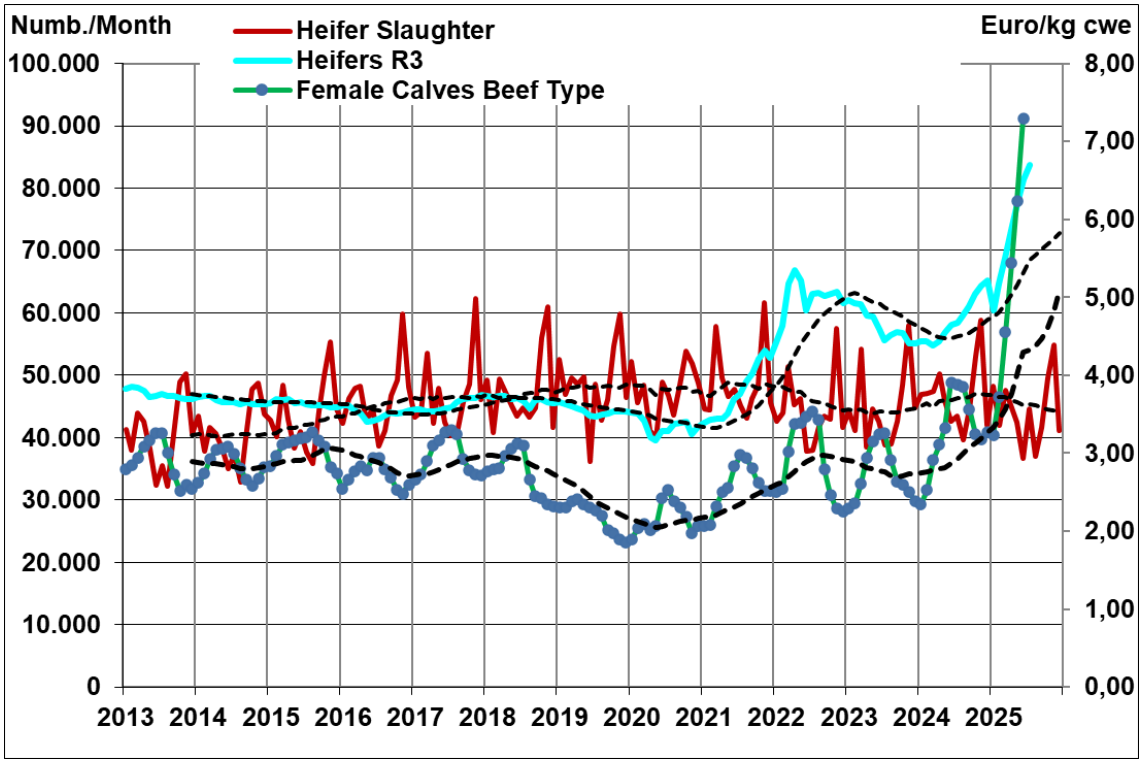
The trend described for bull slaughter can be applied to the trend in cow, heifer and even calf slaughter. Meat-type female calves have also recently been sold at exceptionally high prices. The sharp increase in milk yield per cow, combined with a slight increase in milk production, is reducing the cattle population and thus the potential for beef production. Specialised beef cattle farming is only attractive to a limited extent, as land shortages and in particular expensive rental of land often prevent the necessary cost-effective feed supply.

Figure13 : Slaughterings, Prices for Dairy Cows (and rolling 12-month average)



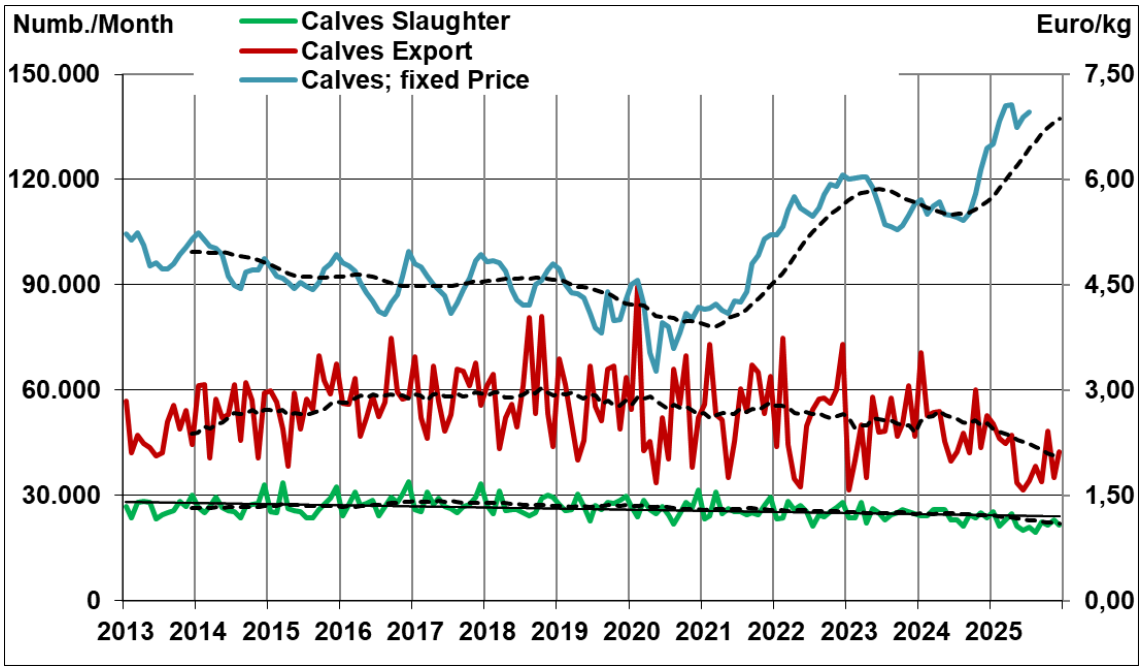
Source: (BMEL 2025; Statistisches Bundesamt ongoing b)

Figure14 : Slaughterings, Prices for Heifers (and rolling 12-month average)



Source: (BMEL 2025; Statistisches Bundesamt ongoing b)

Figure15 : Slaughterings, Exports, Prices for Calves (and rolling 12-month average)



Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

5 Beef production, Beef Balance and Forecast until 2026

(Tables 8 & 9)

- In 2024, the supply of slaughter animals stagnated. The year 2025 is expected to see a very significant decline in slaughtering and beef production. On the one hand, the outbreak of bluetongue disease has led to an overall decline in animal performance and health (Reimink 2025) . This applies to Germany as well as across the EU (Olaf Zinke 2025) . The consequences are lower fattening performance and even the death of infected animals. From a market perspective, this leads to a lower supply of slaughter animals and beef.
- In addition, cattle stocks are declining both globally and within the EU. In the USA, the lowest cattle stock in 75 years has been recorded, while demand for beef has risen exceptionally (Fleischwirtschaft.com 2025) .
- As calf exports from Germany are currently 20% below last year's levels, a slight increase in the fattening of heifers and bulls is expected. At the same time, high milk prices mean that dairy farms are reluctant to cull dairy cows. This is likely to result in a slight increase in cow slaughtering in the coming year. Furthermore, against the backdrop of the current price rally, market experts assume that cattle farmers will delay sales in order to benefit from higher slaughter weights while producer prices remain high and may even rise further (Olaf Zinke 2025) .
- The extent to which bluetongue disease has led to a market-relevant decline in calf births is not entirely clear. Consequently, there is uncertainty regarding the forecast for production development. If the very high producer prices were primarily caused by a shortage of animals due to bluetongue disease, production in 2026 will not achieve the slight increase shown here.

Table8 : Beef Production (as of 07/2025)

Attribute		2010	2020	2024		2025		2026	
				prel.	d (%)	prel./est.	d (%)	est.	d (%)
Slaughter Bulls&Oxen	1.000 t cwe	593	516	466	-0,5	429	-7,8	435	1,2
	1.000 head	1.583	1.278	1.147	-1,1	1.056	-7,9	1.073	1,6
	kg/head	375	404	406	0,5	406	0,1	405	-0,3
Slaughter Cows	1.000 t cwe	409	348	323	0,9	306	-5,1	312	2,0
	1.000 head	1.341	1.110	1.012	-0,3	952	-5,9	972	2,1
	kg/head	305	314	319	1,2	322	0,9	321	0,0
Slaughter Heifers	1.000 t cwe	154	179	179	6,2	169	-5,4	170	0,3
	1.000 head	528	570	561	4,6	530	-5,5	531	0,2
	kg/head	292	315	319	1,5	319	0,1	320	0,1
Slaughter Cattle	1.000 t cwe	1.156	1.044	967	1,1	905	-6,5	917	1,3
	1.000 head	3.452	2.957	2.720	0,4	2.539	-6,7	2.576	1,5
	kg/head	335	353	356	0,8	356	0,2	356	-0,1
Slaughter Calves	1.000 t cwe	44	46	45	0,6	41	-8,4	45	9,5
	1.000 head	322	315	291	-2,3	265	-9,0	303	14,4
	kg/head	136	147	155	2,9	156	0,7	150	-4,2
Slaughter Young cattle	1.000 t cwe	5	3	3	-3,2	2	-18,9	3	13,4
	1.000 head	30	19	17	-8,6	13	-19,9	15	13,5
	kg/head	169	170	186	5,9	188	1,3	188	-0,1
Slaughter Summe	**1.000 t cwe**	**1.205**	**1.094**	**1.016**	**1,1**	**949**	**-6,6**	**965**	**1,7**
	1.000 head	**3.804**	**3.291**	**3.027**	**0,0**	**2.817**	**-7,0**	**2.893**	**2,7**
	kg/head	**317**	**332**	**336**	**1,1**	**337**	**0,4**	**334**	**-1,0**
GIP Bulls&Oxen	1.000 t cwe	590	514	467	-0,3	430	-8,0	436	1,4
	1.000 head	1.568	1.275	1.156	-0,6	1.058	-8,5	1.078	1,9
	kg/head	377	403	404	0,3	407	0,6	405	-0,5
GIP Cows	1.000 t cwe	398	351	325	1,0	309	-4,9	314	1,5
	1.000 head	1.298	1.122	1.025	0,0	962	-6,1	977	1,5
	kg/head	306	313	317	1,0	321	1,2	321	0,0
GIP Heifers	1.000 t cwe	179	200	188	5,2	175	-7,2	177	1,0
	1.000 head	619	643	595	3,6	551	-7,5	556	1,0
	kg/head	289	311	316	1,6	317	0,3	317	0,0
GIP Cattle	1.000 t cwe	1.167	1.065	981	1,2	914	-6,8	927	1,4
	1.000 head	3.485	3.040	2.777	0,5	2.571	-7,4	2.611	1,6
	kg/head	335	350	353	0,7	356	0,6	355	-0,2
GIP Calves	1.000 t cwe	54	62	64	4,7	57	-10,4	62	8,4
	1.000 head	777	948	906	4,8	778	-14,1	845	8,6
	kg/head	70	66	70	-0,1	73	4,3	73	-0,2
GIP Young cattle	1.000 t cwe	5	3	3	-3,2	2	-18,9	3	13,4
	1.000 head	30	19	17	-8,6	13	-19,9	15	13,5
	kg/head	169	170	186	5,9	188	1,3	188	-0,1
GIP Summe	**1.000 t cwe**	**1.227**	**1.130**	**1.048**	**1,4**	**974**	**-7,1**	**991**	**1,8**
	1.000 head	**4.292**	**4.007**	**3.699**	**1,5**	**3.362**	**-9,1**	**3.470**	**3,2**
	kg/head	**286**	**282**	**283**	**-0,1**	**290**	**2,2**	**286**	**-1,4**

GIP: Gross Indigenous Production; Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

- The decline in domestic demand until 2023 was halted in 2024. However, very high beef prices will lead to a renewed decline in demand in 2025. In all likelihood, low domestic production will be partially offset by growing beef imports.
- Due to the slight increase in beef production assumed for 2026, demand is also expected to rise slightly. However, these quantities may also be exported due to the tight supply on the international market.

Table9 : Balance Sheet for Beef and Veal (1.000 t cwe) (as of 07/2025)

Blance sheet items	2010	2020	2021	2022	2023		2024		2025		2026	
						d (%)		d (%)	prel./est.	d (%)	est.	d (%)
GIP	1.227	1.130	1.109	1.012	1.034	2,2	1.048	1,4	974	-7,1	991	1,8
Import, live animals	29	13	15	15	8	-46,1	6	-30,3	6	3,5	7	21,9
Export, live animals	51	50	44	32	37	16,2	38	1,6	31	-18,5	34	8,2
Slaughter	1.205	1.094	1.080	995	1.005	1,0	1.016	1,1	949	-6,6	965	1,7
Import, meat	467	572	564	565	528	-6,5	520	-1,6	550	5,9	534	-3,0
Export, meat	687	556	582	564	561	-0,6	556	-0,9	540	-2,9	529	-2,0
Total consumption	985	1.110	1.063	996	972	-2,4	980	0,8	959	-2,1	970	1,1
kg per capita	12,0	13,5	13,0	12,0	11,7	-2,9	11,7	0,4	11,4	-2,4	11,5	0,8
of which human consumption 1)	786	886	848	795	776	-2,4	782	0,8	765	-2,1	774	1,1
kg per capita	9,6	10,8	10,4	9,6	9,3	-2,9	9,4	0,4	9,1	-2,4	9,2	0,8
SSR (%)	125	102	104	102	106	4,7	107	0,6	102	-5,5	102	0,7
Prices: (Euro je kg)									(Jan-Jul)			
Producer price 2)	2,69	3,07	3,61	4,68	4,32	-7,6	4,56	5,4	6,05	32,8		
Consumer price 3)	5,57	7,12	7,35	8,92	9,44	5,7	9,73	3,1	10,41	7,1		
Market margin 4)	2,87	4,04	3,74	4,24	5,11	20,5	5,17	1,1	4,36	-15,6		
Population (millions)	81,751	82,049	81,940	82,799	83,254	0,6	83,511	0,3	83,768	0,3	84,027	0,3

The differences in totals are due to rounding. - prel. = preliminary. est. = estimate. d (%) = annual rate of change, calculated using unrounded source data. This applies to the Gross Indigeneius Production (GIP), Self-Sufficiency Rate (SSR) and per capita consumption. - Population. Based on the 2022 census. - 1) Human consumption = food consumption, excluding bones, pet feed and losses. 2) Euro per kg cw e, excluding VAT, all classes. 3) Consumer price: Survey on the price index for the cost of living (base: 2020 = 100), 4) Market margin = including producer and consumer prices, excluding VAT.

Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

Differenzen in den Summen durch Rundungen. - v = vorläufig. - S = Schätzung. - d (%) = jährliche Veränderungsraten, anhand nicht gerundeter Ausgangsdaten berechnet, ebenso Selbstversorgungsgrad (SVG) und Pro-Kopf-Verbrauch. - Ew. = Einwohner. - Ab 2006 auf Zensus 2010 beruhend, daher Bruch in der Zeitreihe - 1) Menschlicher Verzehr = Nahrungsverbrauch, ohne Knochen, (Heimtier-)futter, Verluste. - 2) Euro je kg SG, warm, ohne MwSt, alle Klassen. -3) Verbraucherpreis: Erhebung zum Preisindex für die Lebenshaltung (Basis: 2020 = 100); Erzeuger- und Verbraucherpreis OHNE MwSt

6 The German Market for Pork

Within the EU, pig stocks fell only slightly by 0.7% to just under 132 million animals (Dec. 2023 -> Dec. 2024) following the massive decline from December 2021 to December 2023. Accordingly, production is expected to remain stable or increase to some extent (European Commission DG agri 2025). The average EU producer price for class E pigs fell for the second year in a row from €249.66/tonne in July 2023 to €204.86/tonne in July 2025 (-17%) (European Commission DG agri 2023) . The gross margin for pig fattening calculated by the European Commission has been consistently positive from mid-2022 to the current figures for July 2025 due to a similar decline in the cost of feed and piglets. Slaughterhouses in Germany are currently paying producer prices that are barely above average: While the German producer price for HKl E slaughter pigs in July 2024 was still 7 euro/tSG higher (221.62 compared to the EU average of 214.82), in July 2025 it will only be 1 euro/tSG higher (205.83 compared to 204.86) (European Commission DG agri 2025) .

7 Pig Population until May 2025

(Figs. 16–18 & Table 10)

As already described for the EU, pig stocks in Germany have also stabilised since 2023 (Table 11). Since 2015, the number of fattening pigs has fallen by a good 23%, and the number of breeding sows by 31%. The decline was slightly stronger in the eastern than in the western federal states.

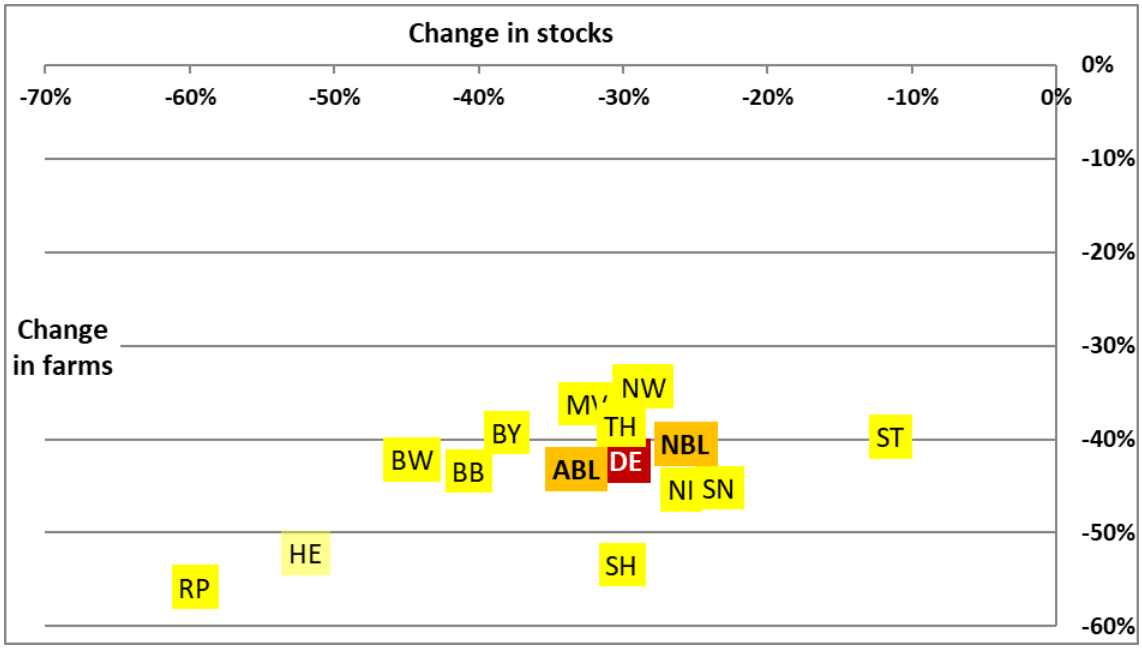
Table10 : Pig Population until May 2025

	May Census	Farms			Livestock			Average Herd Size		
		with Pigs	of which: with Breeding Sows	of which: with Fattening Pigs	Pigs	Breeding Sows	Fattening Pigs	Pigs	Breeding Sows	Fattening Pigs
Germany		Amount						Number per Farm		
	2015	*25.917*	*9.900*	*21.824*	*28.099.492*	*2.024.344*	*12.160.021*	*1084*	*204*	*557*
	2023	16.200	5.270	13.560	20.949.700	1.393.800	9.679.300	1293	264	714
	2024	15.770	5.130	13.160	21.174.200	1.413.900	9.453.500	1343	276	718
	2025	15.250	4.900	12.760	20.917.300	1.395.700	9.389.000	1372	285	736
		Change (%)								
	23 to 22	-9,3	-9,6	-10,1	-6,2	-6,7	-5,6	3,4	3,2	5,0
	24 to 23	-2,7	-2,7	-2,9	1,1	1,4	-2,3	3,8	4,2	0,6
	25 to 24	-3,3	-4,5	-3,0	-1,2	-1,3	-0,7	2,2	3,3	2,4
	25 to 15	-41,2	-50,5	-41,5	-25,6	-31,1	-22,8	26,5	39,3	32,1
	25 to 15*)	-5,2	-6,8	-5,2	-2,9	-3,7	-2,6	2,4	3,4	2,8
	***) = annual growth rate**									
Former Federal Territory (incl. Berlin)		Amount						Number per Farm		
	2015	*24.970*	*9.395*	*21.068*	*23.785.069*	*1.538.079*	*10.994.723*	*953*	*164*	*522*
	2023	15.560	4.950	13.070	17.895.700	1.038.500	8.885.900	1150	210	680
	2024	15.140	4.800	12.680	18.013.400	1.048.800	8.680.200	1190	219	685
	2025	14.620	4.590	12.280	17.717.100	1.030.600	8.531.300	1212	225	695
		Change (%)								
	23 to 22	-9,5	-8,3	-9,9	-5,7	-6,9	-4,5	4,3	1,6	5,9
	24 to 23	-2,7	-3,0	-3,0	0,7	1,0	-2,3	3,5	4,1	0,7
	25 to 24	-3,4	-4,4	-3,2	-1,6	-1,7	-1,7	1,9	2,8	1,5
	25 to 15	-41,4	-51,1	-41,7	-25,5	-33,0	-22,4	27,2	37,1	33,1
New Federal States (excl. Berlin)		Amount						Number per Farm		
	2015	*948*	*505*	*756*	*4.314.423*	*486.265*	*1.165.298*	*4551*	*963*	*1541*
	2023	640	320	490	3.054.000	355.300	793.400	4772	1110	1619
	2024	630	330	480	3.160.800	365.100	773.300	5017	1106	1611
	2025	610	300	450	3.146.600	358.200	816.400	5158	1194	1814
		Change (%)								
	23 to 22	-4,6	-6,7	-10,3	-9,3	-6,3	-16,4	0,8	12,2	2,4
	24 to 23	-1,6	-3,1	-2,0	3,5	2,8	-2,5	5,1	-0,4	-0,5
	25 to 24	-3,2	-9,1	-6,3	-0,4	-1,9	5,6	2,8	7,9	12,6
	25 to 15	-35,7	-40,6	-40,5	-27,1	-26,3	-29,9	13,3	24,0	17,7

Source: (Statistisches Bundesamt, ongoing b)

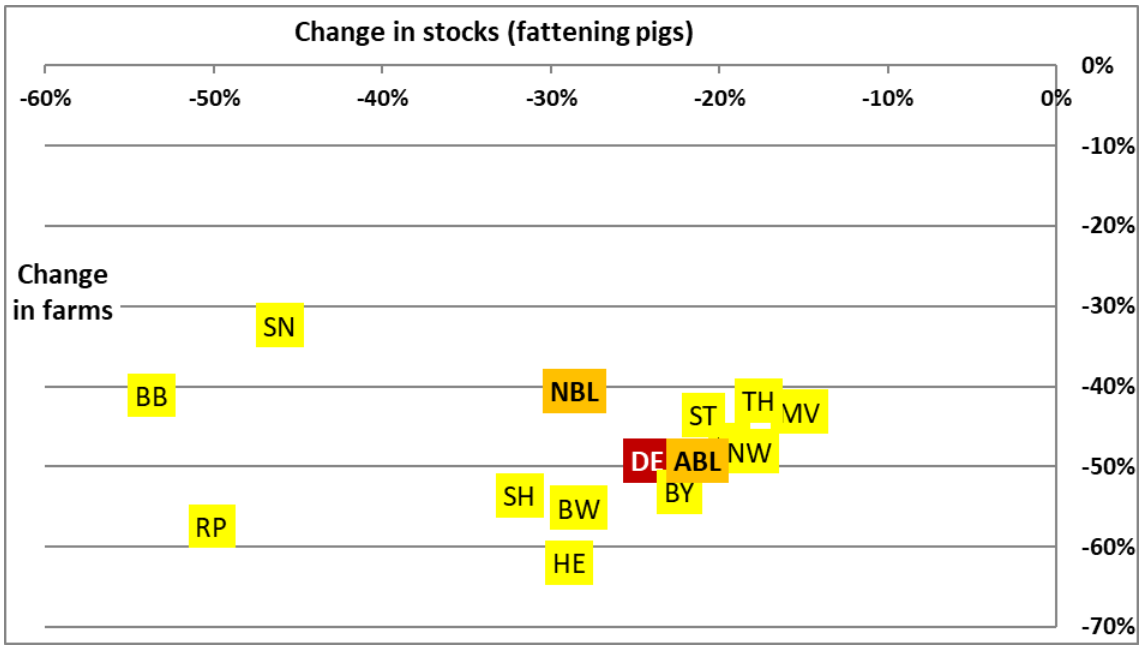
The decline in pig farms is much more pronounced, meaning that the growth in farm size continues unabated. In many cases, farms are expanding by leasing stables from farms that are giving up production rather than by extending or building new stables on their own farms. The latter is also fraught with obstacles due to the high building permit requirements (Ruth Beverborg 2016). The development of farms in the eastern federal states cannot be adequately described (see the crossed-out cells), since the Federal Statistical Office only provides rounded figures. This makes it impossible to conduct a detailed analysis of farm developments at a regional level. The following two figures clearly show the enormous structural change that has taken place over the past 10 years. In several federal states, 50% of farms gave up pig farming within 10 years.

Figure16 : Development of Breeding Sow Farming in Germany May 2015 to 2025 (%)



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

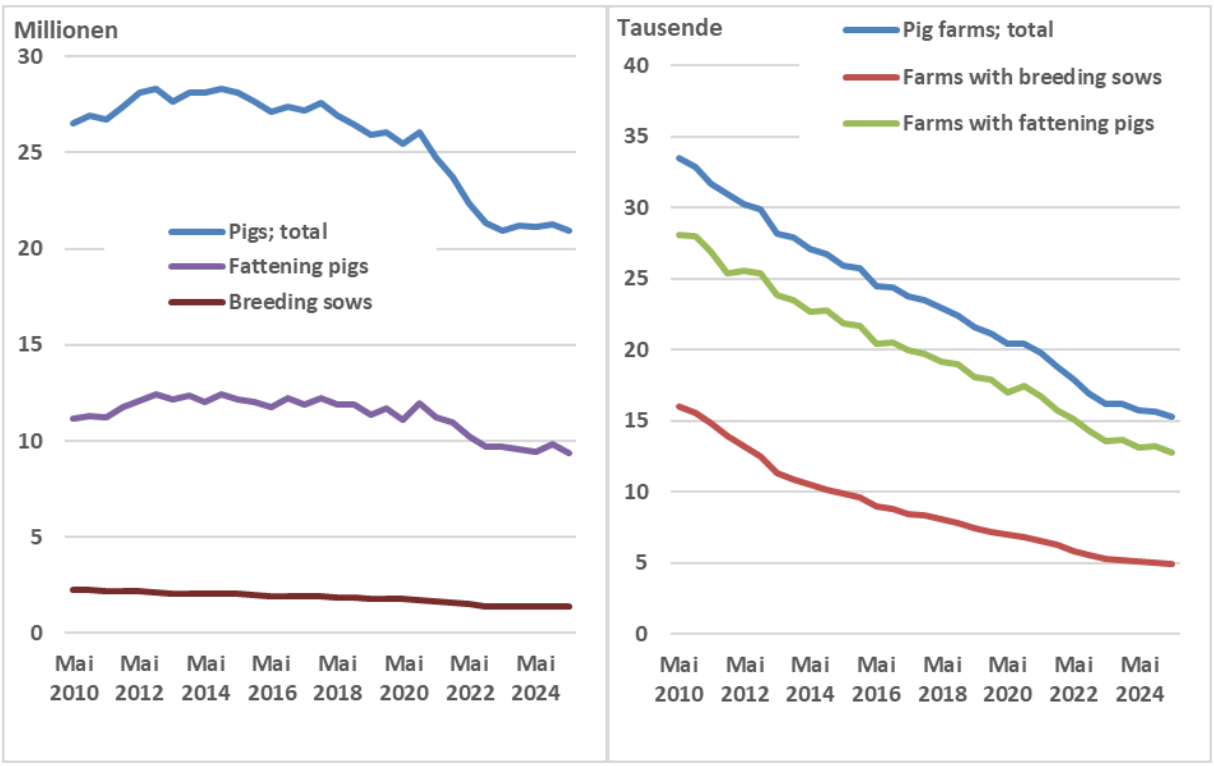
Figure17 : Development of Fattening Pig Farming in Germany May 2015 to 2025 (%)



*): NBL = German New federal States; ABL German former federal States; Source: (Statistisches Bundesamt, ongoing b)

The decline in the number of farms with pig farming has been a constant process for years (Figure 18). In addition, the massive decline in stocks between 2020 and 2023 is evident. Important reasons for this were the coronavirus pandemic, with the loss of out-of-home consumption, and the outbreak of ASF, with the closure of many export markets.

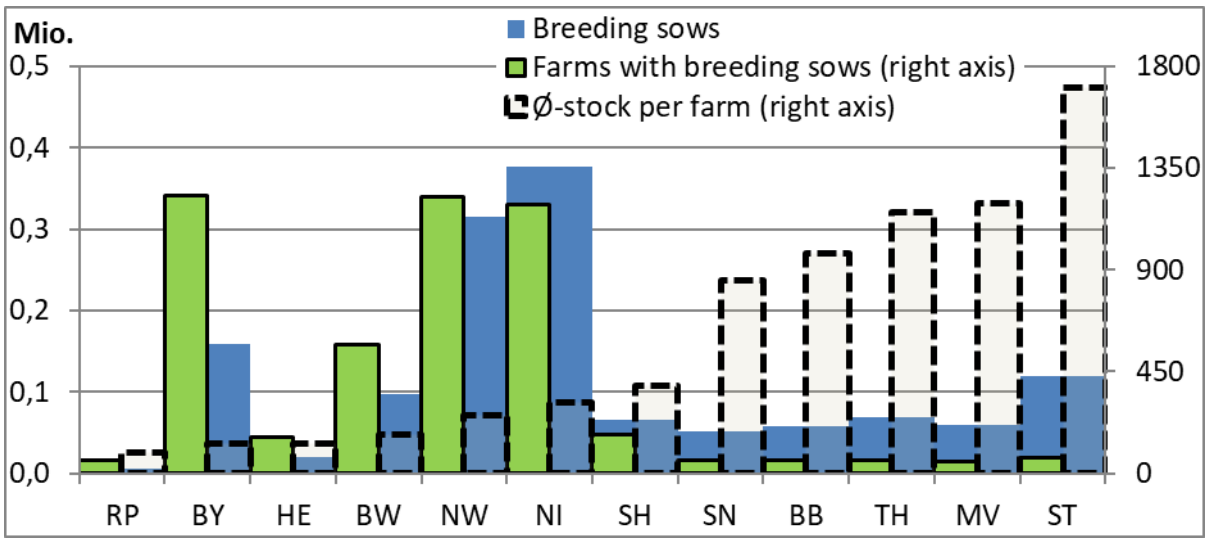
Figure18 : Development of Pig Farming in Germany



Source: (Statistisches Bundesamt, ongoing b)

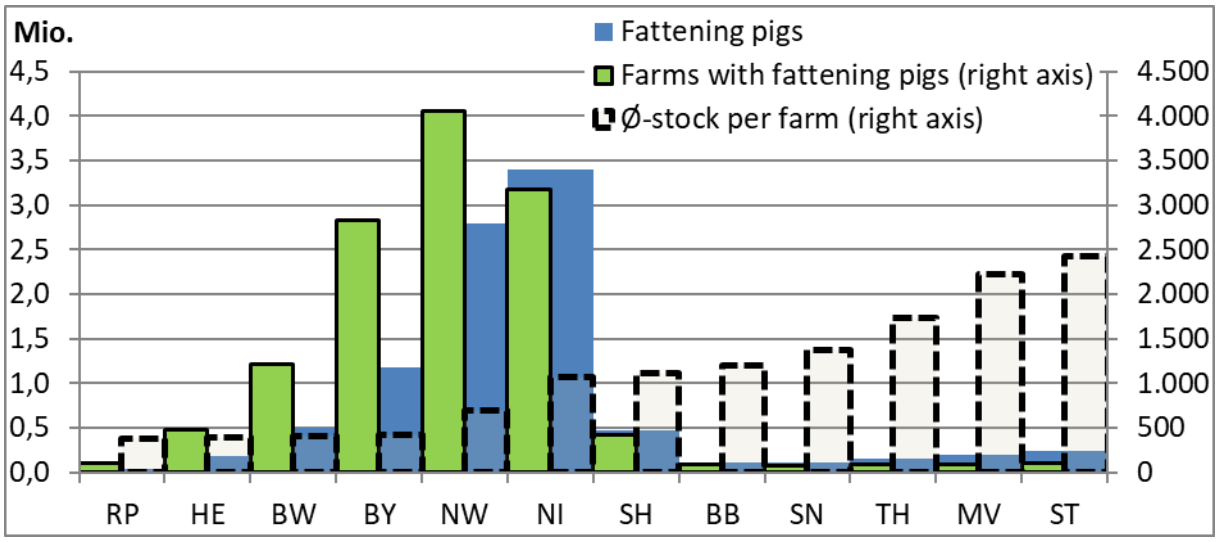
Similar to the situation in cattle farming, the average farm structures in pig farming vary greatly between the federal states (Figs. 19 & 20). Here, too, farms in the eastern federal states are larger. Breeding sow farming and piglet production are more important in the eastern federal states than pig fattening. Overall, pig farming is concentrated in Lower Saxony, North Rhine-Westphalia, Bavaria and Baden-Württemberg.

Figure19 : Structure of Breeding Sow Farming in Germany; May 2025



Source: (Statistisches Bundesamt, ongoing b)

Figure20 : Structure of Fattening Pig Farming in Germany; May 2025



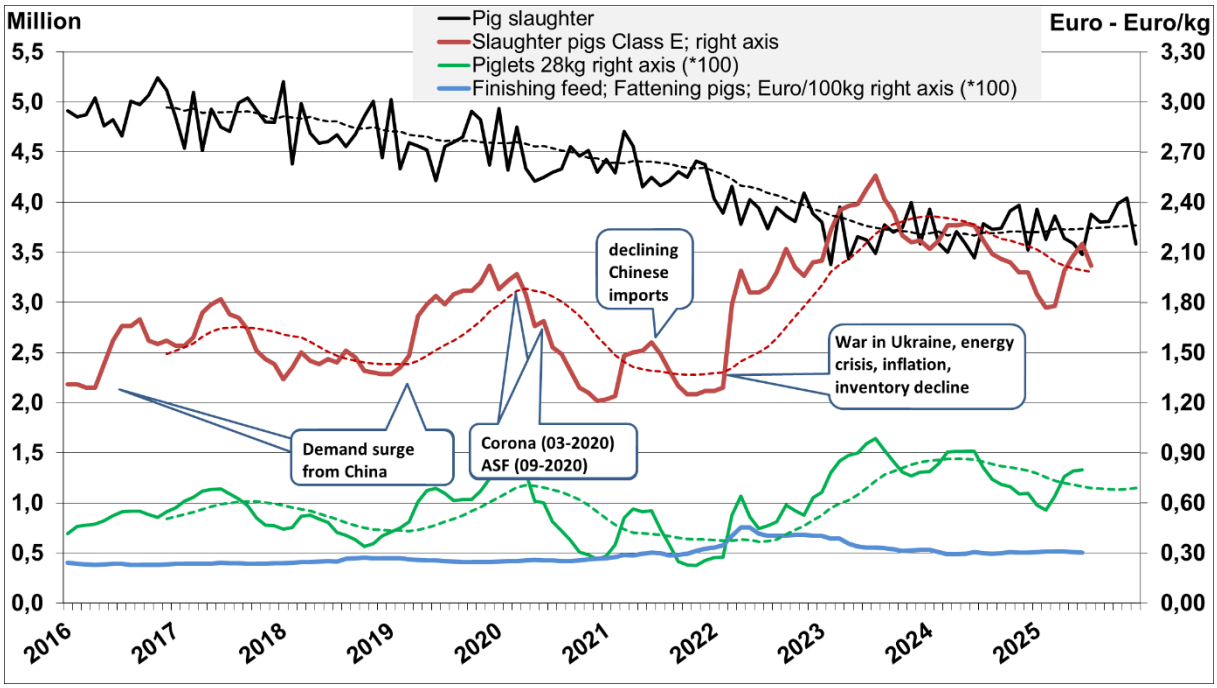
Source: (Statistisches Bundesamt, ongoing b)

8 Pork: Slaughtering and Producer Prices

- Figure 21 clearly shows the turbulence that has affected the pork market over the past 10 years.
- Ultimately, with the outbreak of ASF and the subsequent sharp decline in China's import demand, both the German and subsequently the EU pork industry came under pressure. There was an excessive supply of meat and producer prices for slaughter pigs fell accordingly.
- Figure 22 shows how German companies switched to EU markets: with the outbreak of ASF in Germany (red line in Figure 22), many important third countries such as China and South Korea immediately imposed an import ban on pork from Germany. These quantities were then diverted to EU countries. Spanish companies acted similarly when China imported much less pork in spring 2021, forcing them to divert significant quantities to other countries. These were primarily EU countries.
- It was only the massive stock adjustments across the EU that led to a shortage of slaughter pigs and a very sharp rise in producer prices.
- Since mid-2022, pig farming has been highly profitable (European Commission DG agri 2025) . Accordingly, both the livestock census results and the renewed increase in piglet imports indicate that the industry’s decline has come to an end (see Table 11).
- The adjustments shown at the slaughterhouse and meat processing level indicate that the industry does not expect a renewed expansion of pork production in Germany.
- This is consistent with the results of surveys: as in a survey of more than 1,000 sow and pig farmers conducted by the ISN in 2023 (schweine.net, ISN - Interessengemeinschaft der Schweinehalter Deutschlands e.V. - 2023) , according to the 2025 survey, around 30% of sow farmers and 16% of pig fattening farms intend to give up in the near future (schweine.net, ISN - Interessengemeinschaft der Schweinehalter Deutschlands e.V. 2025) .

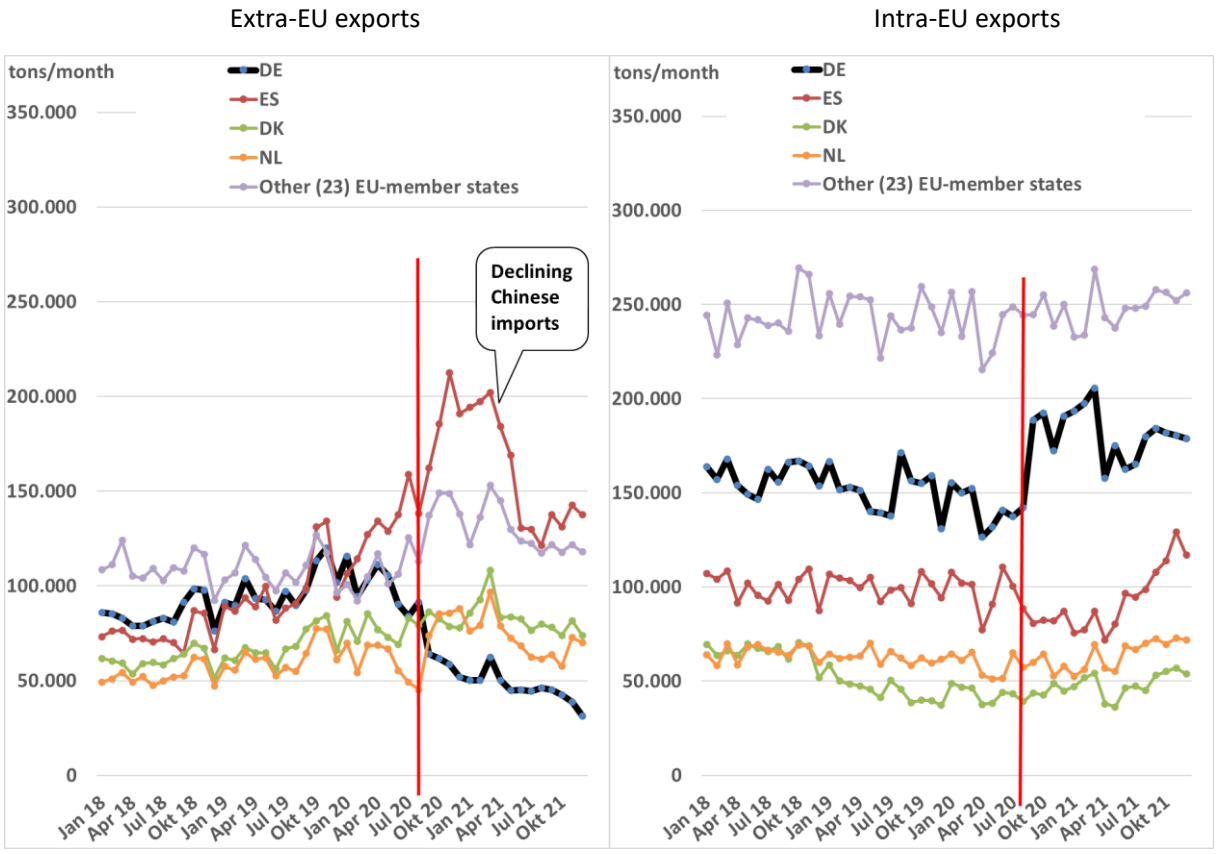
Figure21 : Slaughterings and Prices for Fattening Pigs, Piglets and Feed

(Monthly values; trend line = moving 12-month average)



Sources: (AMI GmbH ongoing c, ongoing a; BMEL 2025; Statistisches Bundesamt ongoing b)

Figure22 : Pork exports of selected countries



Source: (Eurostat 2025)

9 Pork Production, Balance and Forecast until 2026

(Tables 11 & 12)

- Since 2023, both slaughtering and gross own production have stabilised.
- The decline in imports of live pigs is mainly due to fewer imported slaughter pigs, as there is a shortage of slaughter animals across the EU.
- Production from own stock (BEE) has risen sharply, while the breeding sow population has stagnated.

Table11 : Pork Production, 1000 head (as of 07/2025)

Quarter, Year	2022	Change		2023	Change		2024	Change		2025	Change		2026	Change	
		absolute	in %		absolute	in %	prel.	absolute	in %	prel./est.	absolute	in %	est.	absolute	in %
GIP1)															
I	**9.770**	-1.410	-12,6	**8.722**	-1.047	-10,7	**8.556**	-166	-1,9	**9.305**	749	8,8	**9.104**	-201	-2,2
II	**9.667**	-413	-4,1	**8.414**	-1.252	-13,0	**8.119**	-295	-3,5	**8.380**	260	3,2	**8.813**	433	5,2
III	**9.648**	-791	-7,6	**8.653**	-995	-10,3	**8.827**	175	2,0	**9.204**	376	4,3	**9.039**	-165	-1,8
IV	**9.805**	-1.048	-9,7	**9.039**	-766	-7,8	**9.013**	-26	-0,3	**9.373**	359	4,0	**9.491**	118	1,3
Year	**38.889**	-3.661	-8,6	**34.829**	-4.061	-10,4	**34.516**	-313	-0,9	**36.261**	1.745	5,1	**36.447**	186	0,5
Import live animals															
I	**2.751**	-120	-4,2	**2.778**	27	1,0	**2.895**	117	4,2	**2.591**	-304	-10,5	**2.539**	-52	-2,0
II	**2.499**	-459	-15,5	**2.704**	205	8,2	**3.030**	325	12,0	**2.750**	-279	-9,2	**2.695**	-55	-2,0
III	**2.385**	-396	-14,2	**2.753**	369	15,5	**2.887**	133	4,8	**2.579**	-307	-10,6	**2.528**	-52	-2,0
IV	**2.407**	-271	-10,1	**2.740**	333	13,8	**2.865**	125	4,5	**2.576**	-289	-10,1	**2.524**	-52	-2,0
Year	**10.042**	-1.246	-11,0	**10.976**	934	9,3	**11.676**	700	6,4	**10.497**	-1.180	-10,1	**10.287**	-210	-2,0
Export live animals															
I	**433**	-167	-27,8	**370**	-64	-14,7	**426**	57	15,4	**471**	44	10,3	**400**	-71	-15,0
II	**419**	76	22,2	**406**	-13	-3,1	**411**	5	1,2	**423**	12	2,9	**400**	-23	-5,4
III	**482**	-46	-8,6	**444**	-39	-8,0	**455**	11	2,5	**463**	8	1,8	**440**	-23	-4,9
IV	**427**	-65	-13,2	**454**	27	6,3	**472**	17	3,9	**483**	11	2,3	**460**	-23	-4,7
Year	**1.762**	-202	-10,3	**1.674**	-88	-5,0	**1.764**	90	5,4	**1.839**	75	4,3	**1.700**	-139	-7,5
Slaughter															
I	**12.087**	-1.363	-10,1	**11.130**	-956	-7,9	**11.025**	-106	-1,0	**11.426**	401	3,6	**11.244**	-182	-1,6
II	**11.747**	-948	-7,5	**10.713**	-1.034	-8,8	**10.738**	25	0,2	**10.707**	-31	-0,3	**11.108**	401	3,7
III	11.550	-1.141	-9,0	**10.962**	-588	-5,1	**11.259**	297	2,7	**11.320**	61	0,5	**11.127**	-193	-1,7
IV	11.785	-1.254	-9,6	**11.326**	-459	-3,9	**11.407**	81	0,7	**11.466**	59	0,5	**11.555**	89	0,8
Year	**47.169**	-4.706	-9,1	**44.131**	-3.038	-6,4	**44.428**	298	0,7	**44.919**	491	1,1	**45.034**	114	0,3
Slaughterings at home/farm															
I	**22**	0	-1,9	**21**	-1	-2,5	**18**	-4	-16,7	**16**	-2	-11,6	**14**	-1	-7,6
II	**8**	0	5,1	**7**	-1	-9,2	**5**	-2	-28,8	**4**	-1	-19,2	**4**	0	-8,6
III	**5**	0	-7,3	**4**	-1	-17,7	**3**	-1	-32,2	**2**	0	-14,1	**2**	0	-14,1
IV	**21**	-2	-10,4	**18**	-3	-15,6	**15**	-3	-14,8	**14**	-1	-9,9	**12**	-1	-9,8
Year	**56**	-3	-4,9	**50**	-5	-9,8	**41**	-10	-19,1	**36**	-5	-12,1	**32**	-3	-9,0
Total supply															
I	**12.065**	-1.362	-10,1	**11.109**	-956	-7,9	**11.007**	-102	-0,9	**11.410**	403	3,7	**11.230**	-181	-1,6
II	**11.739**	-948	-7,5	**10.705**	-1.034	-8,8	**10.733**	28	0,3	**10.703**	-30	-0,3	**11.104**	401	3,7
III	**11.545**	-1.141	-9,0	**10.958**	-587	-5,1	**11.257**	298	2,7	**11.318**	61	0,5	**11.125**	-193	-1,7
IV	**11.764**	-1.252	-9,6	**11.308**	-456	-3,9	**11.392**	84	0,7	**11.452**	61	0,5	**11.543**	90	0,8
Year	**47.114**	-4.703	-9,1	**44.081**	-3.033	-6,4	**44.388**	307	0,7	**44.884**	496	1,1	**45.001**	118	0,3

prel. = preliminary. est. = estimate. d (%) = annual rate of change, calculated using unrounded source data. 1) GIP = Gross Indigeneius Production

Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

- Since 2023, the number of pigs slaughtered has again risen slightly.
- While pork exports are also expected to rise slightly in 2024 and 2025, imports are declining. It is clear that the domestic market is sufficiently supplied and offers less room for foreign goods.
- The underlying data indicate stable to slightly declining pork consumption in 2025 and 2026. One assumption is that high beef prices will lead to a partial shift to pork.
- Overall, domestic pork production remains significantly higher than domestic consumption. Despite the restrictions imposed by ASF on third-country markets, the industry is still managing to export considerable quantities.
- Accordingly, the self-sufficiency rate in Germany is between 130 and 140%.

Table12 : Pork Balance, 1000 t cwe (as of 07/2025)

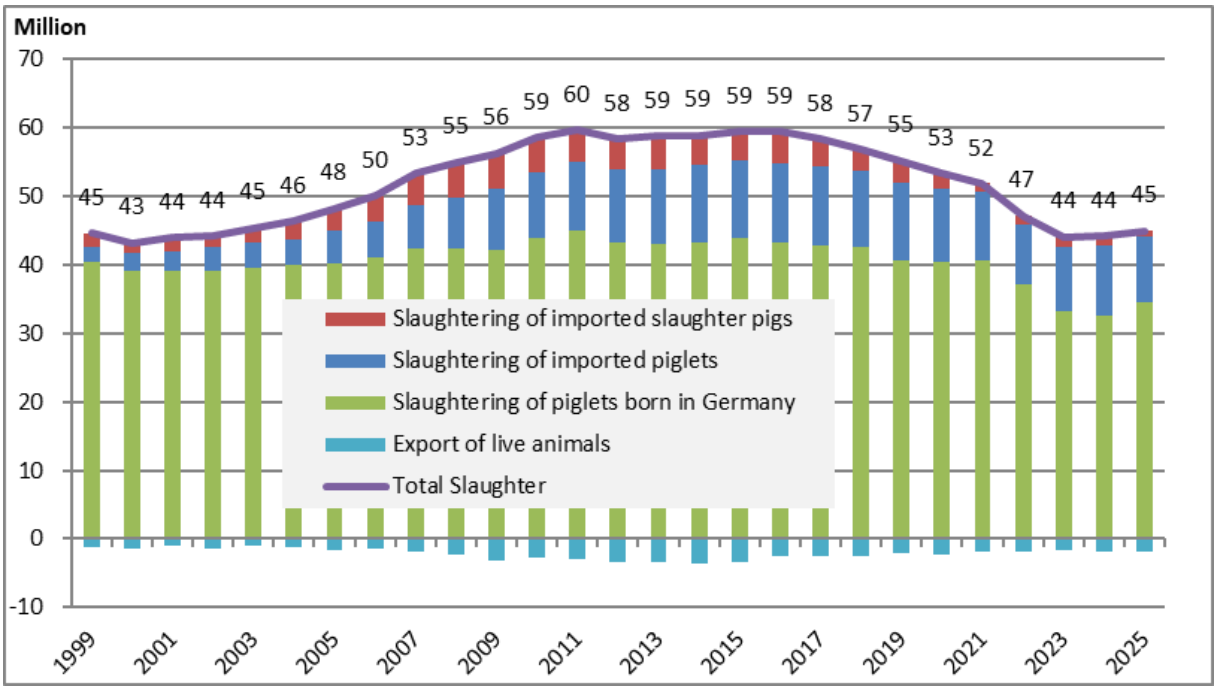
Blance sheet items	2010	2020	2021	2022	d (%)	2023	d (%)	2024 prel.	d (%)	2025 prel./est.	d (%)	2026 est.	d (%)
GIP	4.928	4.750	4.724	4.255	-9,9	3.939	-7,4	4.012	1,8	4.129	2,9	4.140	0,3
Import, live animals	688	442	323	306	-5,3	344	12,5	355	3,2	291	-18,1	285	-2,0
Export, live animals	127	75	76	69	-8,3	74	6,5	78	5,7	82	4,7	76	-7,5
Slaughter	5.488	5.117	4.971	4.492	-9,6	4.210	-6,3	4.289	1,9	4.338	1,2	4.349	0,3
Import, meat	1.289	1.151	1.084	1.055	-2,7	990	-6,2	963	-2,8	913	-5,2	876	-4,0
Export, meat	2.767	3.086	2.852	2.572	-9,8	2.217	-13,8	2.289	3,3	2.314	1,1	2.267	-2,0
Total consumption	4.011	3.182	3.204	2.975	-7,1	2.983	0,3	2.963	-0,7	2.938	-0,8	2.958	0,7
kg per capita	49,1	38,8	39,1	35,9	-8,1	35,8	-0,3	35,5	-1,0	35,1	-1,2	35,2	0,4
of which human consumptio	3.187	2.529	2.546	2.364	-7,1	2.370	0,3	2.354	-0,7	2.334	-0,8	2.351	0,7
kg per capita	39,0	30,8	31,1	28,6	-8,1	28,5	-0,3	28,2	-1,0	27,9	-1,2	28,0	0,4
SSR (%)	122,9	149,3	147,4	143,0	-3,0	132,1	-7,7	135,4	2,5	140,6	3,8	139,9	-0,4
Prices: (Euro je kg)													
Producer price 2)	1,38	1,61	1,38	1,85	33,9	2,32	25,4	2,15	-7,3				
Consumer price 3)	4,49	5,76	5,92	6,68	12,9	7,13	6,8	7,18	0,7				
Market margin	3,11	4,15	4,53	4,83	6,5	4,81	-0,4	5,02	4,5				
Population (millions)	81,751	82,049	81,940	82,799	1,0	83,254	0,6	83,511	0,3	83,768	0,3	84,027	0,3

The differences in totals are due to rounding. - prel. = preliminary. est. = estimate. d (%) = annual rate of change, calculated using unrounded source data. This applies to the Gross Indigeneius Production (GIP), Self-Sufficiency Rate (SSR) and per capita consumption. - Population. Based on the 2022 census. - 1) Human consumption = food consumption, excluding bones, pet feed and losses. 2) Euro per kg cwe, excluding VAT, all classes. 3) Consumer price: Survey on the price index for the cost of living (base: 2020 = 100), 4) Market margin = including producer and consumer prices, excluding VAT.

Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

Figure 23 paints a slightly different picture of pork production in Germany than the meat balance in Table 12, as it shows the composition of slaughtered pigs by origin. The expansion phase of pork production since 2004/2005 has been almost entirely fuelled by imports of live pigs. In 2016, imported pigs accounted for 27% of domestic slaughtering, compared with 26% in 2024. The decline in production since 2016, and particularly in the years 2021 to 2023, is due to both a drop in imports of slaughter pigs and a decline in domestic production. Overall, it is clear that domestic meat production is based to a considerable extent on imported live pigs.

Figure23 : Germany's Pork Balance in Units and by Origin



Source: (AMI GmbH ongoing c; BMEL 2025; Statistisches Bundesamt ongoing b, ongoing a)

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