Market evolution: Live animals (CN 01) — 2015–2025

Introduction

This report examines the evolution of European Union external trade in live animals (CN 01) between 2015 and 2025. The product group covers live horses, bovine animals, swine, sheep and goats, poultry and other live animals. All trade figures refer to transactions with non-EU partners. Three central dynamics structure the analysis: the power of rising unit values to lift export revenues even as volumes shrink, a profound geographical reorientation of EU live animal exports, and a shifting internal pattern of member-state specialisation and product composition.

Soaring export prices drive revenue growth despite shrinking volumes

Overall export value rises steadily while export volumes contract

Between 2015 and 2025 the value of EU live animal exports grew by 37.2 %, from €2.71 billion to €3.72 billion. Over the same period the shipped quantity fell by 13.6 %, from 533 thousand tonnes to 460 thousand tonnes. The divergence is explained by a strong increase in implicit unit prices, which jumped by 58.9 % (from €5 093 to €8 091 per tonne).

Overview of EU trade in live animals

Indicator	2015	2025	Change
Export value (€)	2.71 bn	3.72 bn	+37.2 %
Export quantity (tonnes)	532 984	460 321	–13.6 %
Export unit price (€/t)	5 093	8 091	+58.9 %

Import growth is volume-driven, with only moderate price increases

Imports of live animals into the EU also rose in value (+42.1 %, from €598 million to €850 million), but the growth was propelled almost entirely by larger volumes (+29.1 %), while unit prices crept up by just 10.2 %. This indicates that EU buyers absorbed more animals at relatively stable unit costs, in contrast to the much sharper price escalation on the export side.

Indicator	2015	2025	Change
Import value (€)	598 mn	850 mn	+42.1 %
Import quantity (tonnes)	17 535	22 630	+29.1 %
Import unit price (€/t)	34 094	37 562	+10.2 %

The trade surplus widens, reinforcing the EU’s net-exporter position

The export–import gap expanded from €2.12 billion in 2015 to €2.87 billion in 2025 (a rise of 35.8 %), confirming that live animals remain a structural net-export sector for the Union. The combination of rising export unit values and a comparatively moderate increase in import expenditure pushes the surplus ever higher, even as physical export tonnages have declined.

A dramatic geographic reorientation of EU live animal exports

Traditional MENA destinations collapse; Israel and Algeria become pivotal

The top export partner list reveals a profound shift. Turkey, once the second-largest buyer, saw its imports from the EU collapse by 92.4 % (from €322 million to €25 million). Libya (–77.9 %) and Lebanon (–55.8 %) recorded similarly steep declines. In their place, Israel emerged as the second most important destination, with exports soaring by 469.7 % to €351 million. Algeria (+141.2 %) and Jordan (+62.2 %) also grew substantially, while the “Other” category expanded by 74.1 %, indicating a broadening of export outlets.

Top trade partners

Export partner	2015 (€ mn)	2025 (€ mn)	Change
United Kingdom	504.8	746.4	+47.9 %
Israel	61.7	351.3	+469.7 %
Algeria	71.7	173.0	+141.2 %
Jordan	77.9	126.3	+62.2 %
Lebanon	208.6	92.2	–55.8 %
Libya	224.1	49.6	–77.9 %
Turkey	321.8	24.6	–92.4 %
Other	1 244.0	2 161.0	+74.1 %

The United Kingdom remains the unwavering anchor of both exports and imports

The United Kingdom stands out as the single most stable and dominant partner on both sides. EU exports to the UK grew by 47.9 % to €746 million, while imports from the UK rose by 39.5 % to €603 million. The UK's consistent position underscores the deep-rooted, mutually important live-animal trade links that survived Brexit. On the import side, the UK accounted for more than 70 % of total EU live animal imports in 2025, leaving the import market highly concentrated (HHI around 5 200). In contrast, export concentration is low (HHI ≈ 840), reflecting the diversity of non-EU buyers.

High volatility and a price shock in Morocco highlight supply risks

Several export markets exhibit exceptionally volatile quantities. Morocco's coefficient of variation (CV) reached 0.99, driven by a major price shock in 2022 when its import prices jumped 32.3 % above the baseline while volumes temporarily collapsed. Turkey (CV 0.62), Libya (0.62) and Saudi Arabia (1.03) also show large swings, often linked to changing health protocols, political instability or economic conditions in the Middle East and North Africa. On the import side, supplies from Chile (CV 2.52) and Belarus (0.89) have been highly erratic, though their value shares remain small.

Volatility of trade flows

Detected shock event (Morocco)

Selected export partner	Volatility (CV)
Morocco	0.99
Saudi Arabia	1.03
Turkey	0.62
Libya	0.62
United Kingdom	0.09

Shifting specialisation and product mix within the EU

Denmark, Croatia and France show the strongest revealed comparative advantage

In 2025 the most specialised EU exporters, measured by the Revealed Symmetric Comparative Advantage (RSCA) index, are Denmark (0.78), Croatia (0.54) and France (0.52). These countries allocate an outsized share of their total exports to live animals relative to the EU average. At the other end of the spectrum, Malta (–0.99), Finland (–0.88) and Italy (–0.86) have virtually no export orientation in this product group. Such stark differences highlight the strong geographic clustering of live animal production and trading platforms within the Union.

Specialisation map

Most specialised (RSCA)	Least specialised (RSCA)
Denmark 0.78	Malta –0.99
Croatia 0.54	Finland –0.88
France 0.52	Greece –0.88
Latvia 0.47	Italy –0.86
Lithuania 0.36	Sweden –0.83

Ireland and Romania surge as export champions, while France and Germany lose ground

The EU-level export dynamic is mirrored by large shifts among member states. Ireland’s extra-EU exports jumped by 60.8 % to €598 million, while Romania recorded the fastest growth (+167.0 %) reaching €436 million in 2025. Hungary (+72.7 %), Spain (+36.4 %) and the Netherlands (+17.8 %) also expanded. By contrast, France (–7.5 %) and Germany (–9.3 %) saw their export values contract, suggesting that the centre of gravity for live animal trade has moved towards north-western and eastern member states.

Top reporting member states

EU exporter	2015 (€ mn)	2025 (€ mn)	Change
Ireland	372.1	598.4	+60.8 %
Romania	163.2	435.8	+167.0 %
Netherlands	414.7	488.7	+17.8 %
France	449.9	415.9	–7.5 %
Spain	285.5	389.4	+36.4 %
Hungary	144.4	249.4	+72.7 %
Germany	293.7	266.4	–9.3 %

Poultry and horses gain value share as bovine exports lose momentum

The product composition of extra-EU exports has evolved markedly. While live bovine animals (0102) remain a large category, their export value stagnated, dipping from €1 016 million in 2015 to €993 million in 2025, after having peaked at €1 384 million in 2023. Meanwhile, all other major segments expanded vigorously. Shipments of live horses, asses and mules (0101) rose by 63.6 % to €1 322 million, sheep and goats (0104) more than doubled, swine (0103) climbed by 61.4 %, and poultry (0105) increased by 38.2 %. The “other live animals” category (0106) also grew by 51.7 %. On the import side, horses dominate (€477 million in 2025), but the fastest expansion came from poultry (+116.8 %) and sheep/goats (from €3.3 million to €52.1 million).

Product segment breakdown

EU export value by main CN subheading (€ million)

CN	Description	2015	2025	Change
0101	Horses, asses, mules, hinnies	808.0	1 322.4	+63.6 %
0102	Bovine animals	1 015.8	993.2	–2.2 %
0104	Sheep and goats	219.6	495.0	+125.4 %
0105	Poultry	339.8	469.7	+38.2 %
0103	Swine	129.7	209.4	+61.4 %
0106	Other live animals	174.8	265.2	+51.7 %

Conclusion

Between 2015 and 2025 the EU's external live animal trade has been defined by a powerful price-driven increase in export value, even as physical volumes contracted. The export geography was reshaped: Israel, Algeria and Jordan replaced collapsing markets like Turkey, Libya and Lebanon, while the United Kingdom remained the stable anchor on both sides. Internally, specialisation has deepened, with Ireland, Romania and the Baltics gaining export share at the expense of France and Germany, and the product mix has tilted towards horses, sheep, goats and poultry, reducing the earlier dominance of bovine animals. These trends, coupled with high volatility in several Mediterranean destinations, suggest that the sector is adapting to shifting sanitary, political and demand conditions, while continuing to secure a large and widening trade surplus.
