EU TRADE EXPLORER

Market evolution: Meat and edible offal (CN 02) — 2015–2025

Introduction

This report analyses the European Union's external trade in **Meat and edible offal** (Harmonised System heading 02) with non-EU countries over the years 2015 to 2025. The product group covers fresh, chilled, frozen, salted, dried or smoked meat and offal of bovine animals, swine, sheep, goats, poultry and other species, as well as pig and poultry fat. The analysis draws on official trade data from the EU Trade Dashboard. Over the decade the EU remained a net exporter, but the composition of trade, the set of key partners and the price dynamics underwent significant changes.

1. Inflated prices drive value growth while trade surplus widens

Export and import values both rise substantially despite falling volumes

Between 2015 and 2025 the value of EU meat exports grew by **32.8%**, from €13.0 bn to €17.3 bn, while import value increased by **38.2%**, from €4.8 bn to €6.6 bn. This growth was achieved in spite of a contraction in traded quantities: export volume decreased by 4.0% (from 6.27 to 6.02 million tonnes) and import volume by 4.3% (from 1.24 to 1.19 million tonnes). Consequently, the entire value increase was driven by rising unit prices.

Unit prices surge across both flows, more than doubling for some products

Export prices climbed **38.3%**, from €2,074 to €2,868 per tonne, and import prices surged **44.4%**, from €3,851 to €5,560 per tonne. The acceleration was particularly pronounced after 2021; import prices, for instance, jumped from €3,438 per tonne in 2021 to €5,560 in 2025. Price developments were not uniform across products, as will be shown in Section 3.

The EU's meat trade surplus expands by almost 30 percent

The trade balance, consistently positive throughout the period, rose from €8.2 bn in 2015 to **€10.6 bn** in 2025, an increase of 29.6%. The surplus peaked at €14.9 bn in 2020, driven by an exceptional export performance to China, and then returned to a still-elevated level above €10 bn by 2025. The table below summarises the headline trade figures.

Indicator	2015	2025	Change (%)
Exports (€ bn)	13.0	17.3	+32.8
Export quantity (mn t)	6.27	6.02	–4.0
Export price (€/t)	2,074	2,868	+38.3
Imports (€ bn)	4.79	6.62	+38.2
Import quantity (mn t)	1.24	1.19	–4.3
Import price (€/t)	3,851	5,560	+44.4
Trade balance (€ bn)	8.21	10.64	+29.6

Source: EU trade in meat and edible offal.

2. Partner diversification and supply shocks redraw the trade map

Concentration falls as the EU broadens its import sources and export destinations

The Herfindahl-Hirschman Index (HHI) for the geographical concentration of trade declined for both flows. Import concentration dropped from 1,716 to 1,462 (–14.8%), while export concentration fell from 1,713 to 1,380 (–19.4%). This indicates a more diversified portfolio of partners, reducing reliance on any single market. The trend is mirrored by the market concentration (HHI) data.

China’s boom-and-bust cycle and the steady role of the United Kingdom

China was the most volatile export destination. Deliveries to China soared from €1.7 bn in 2015 to a peak of **€7.4 bn in 2020**, following the African Swine Fever crisis, but then contracted to €2.0 bn in 2025. Over the whole period the value still increased by 14.2%, yet the path was extremely erratic (coefficient of variation of quantity flows: 0.424). In contrast, the United Kingdom remained the largest and most stable export market, growing from €4.8 bn to €5.7 bn (+17.5%). On the import side, the UK was also the top supplier, with €1.5 to €1.8 bn (+20.3%).

Ukraine’s rapid rise, Latin American gains, and the Hong Kong collapse

Imports from Ukraine exhibited the strongest relative growth (+601.8%), climbing from €65 mn to €459 mn, facilitated by trade liberalisation measures. Other major suppliers also recorded significant increases: Argentina (+88.4% to €795 mn), Uruguay (+64.1% to €485 mn) and Brazil (+21.2% to €1.15 bn). Among export destinations, the Philippines expanded by 217.4% (to €715 mn), South Korea by 65.9% (to €912 mn) and Ghana by 143.8% (to €224 mn). Meanwhile, exports to Hong Kong collapsed by **66.2%**, falling from €591 mn to €200 mn.

Price shocks hit imports in 2022 and reshape export earnings from China

The volatility and shock analysis identifies three major price shocks on imports in 2022: from **New Zealand** (+31.1% price shift), **Brazil** (+39.9%) and **Thailand** (+61.1%). These events reflect the global post-pandemic supply tightness and higher input costs. On the export side, a large positive price shock was detected for **China in 2019** (+44.4%), coinciding with the dramatic surge in Chinese demand and resulting price inflation for EU pork.

Top export partners	2015 (€ bn)	2025 (€ bn)	Change (%)
United Kingdom	4.81	5.65	+17.5
China	1.74	1.99	+14.2
Philippines	0.23	0.71	+217.4
Korea, Republic of	0.55	0.91	+65.9
Japan	1.14	1.09	–4.2
Hong Kong	0.59	0.20	–66.2
Ghana	0.09	0.22	+143.8

Top import partners	2015 (€ bn)	2025 (€ bn)	Change (%)
United Kingdom	1.47	1.77	+20.3
Brazil	0.95	1.15	+21.2
Ukraine	0.07	0.46	+601.8
New Zealand	0.67	0.82	+22.1
Argentina	0.42	0.79	+88.4
Uruguay	0.30	0.49	+64.1
Thailand	0.19	0.28	+45.4

Source: Top trade partners.

3. Product specialisation anchors EU competitiveness in pork and poultry

Pork and poultry dominate EU exports, while bovine and ovine meat lead imports

The product segment breakdown reveals a clear pattern. EU exports are overwhelmingly composed of **pork (CN 0203)** and **poultry (CN 0207)**, which together account for the majority of export value. In 2025, pork exports were worth €6.0 bn, up from €4.97 bn in 2015, and poultry exports reached €3.6 bn (€2.9 bn in 2015). On the import side, the largest categories are **fresh/chilled bovine meat (CN 0201)**, which grew from €1.56 bn to €2.25 bn, and **sheep & goat meat (CN 0204)**, up from €0.97 bn to €1.50 bn. Frozen bovine meat (CN 0202) also registered a sharp increase, from €0.45 bn to €0.89 bn.

Denmark, Poland, Spain and Ireland stand out as the most specialised meat exporters

According to the specialisation analysis for 2025, five member states exhibit a very strong revealed comparative advantage (RCA > 1.36) in meat exports:

Member state	RSCA	RCA	Share of EU meat exports	Share of total EU exports
Denmark	0.40	2.33	4.0%	1.7%
Poland	0.40	2.33	15.5%	6.6%
Spain	0.39	2.28	13.2%	5.8%
Ireland	0.33	1.98	4.1%	2.1%
Netherlands	0.15	1.36	19.8%	14.5%

Conversely, Malta, Sweden, Czechia, Finland and Slovakia are among the least specialised, with negative RSCA values below –0.71.

Within product categories, import prices for frozen bovine and poultry meat spike after 2022

Unit price trends varied markedly by product. For imports, the price of **poultry meat (0207)** rose from €1,567 to €2,335 per tonne between 2015 and 2025, while **frozen bovine meat (0202)** increased from €5,983 to €6,980 per tonne, with a notable jump after 2022. **Edible offal (0206)** prices nearly doubled, from €888 to €1,620 per tonne. On the export side, **fresh/chilled bovine meat (0201)** commanded the highest price, soaring from €5,020 to €8,555 per tonne, reflecting the premium placed on EU quality beef. **Processed and salted meats (0210)** also registered a strong price increase, from €3,794 to €6,284 per tonne. These price movements, combined with stable or slightly declining volumes, explain the overall value growth described in Section 1.

Conclusion

The EU's external trade in meat and edible offal underwent a profound transformation between 2015 and 2025. While total volumes contracted slightly, steep price increases, particularly after 2021, pushed both export and import values to record highs and widened the trade surplus. The geographical concentration of trade diminished, reflecting a deliberate diversification of both supply sources and export markets. China's demand shock, the enduring partnership with the United Kingdom, and the rapid emergence of Ukraine as a supplier stand out as pivotal shifts. Product specialisation remains strong, with pork and poultry anchoring exports and bovine and sheep meat dominating imports, while member states such as Denmark, Poland, Spain and Ireland preserve a pronounced competitive edge. Looking ahead, the ability of EU producers and traders to navigate price volatility, supply chain disruptions and evolving partner relationships will continue to shape the dynamics of this vital agricultural sector.

Generated on 2026-07-24 based on data from tradedashboard.eu

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at this address.