

Symposium of the Animal Task Force & EAAP Commissions on “Livestock Farming Systems” and “Sheep & Goat”:

European resilient livestock farming systems in a continuously changing world

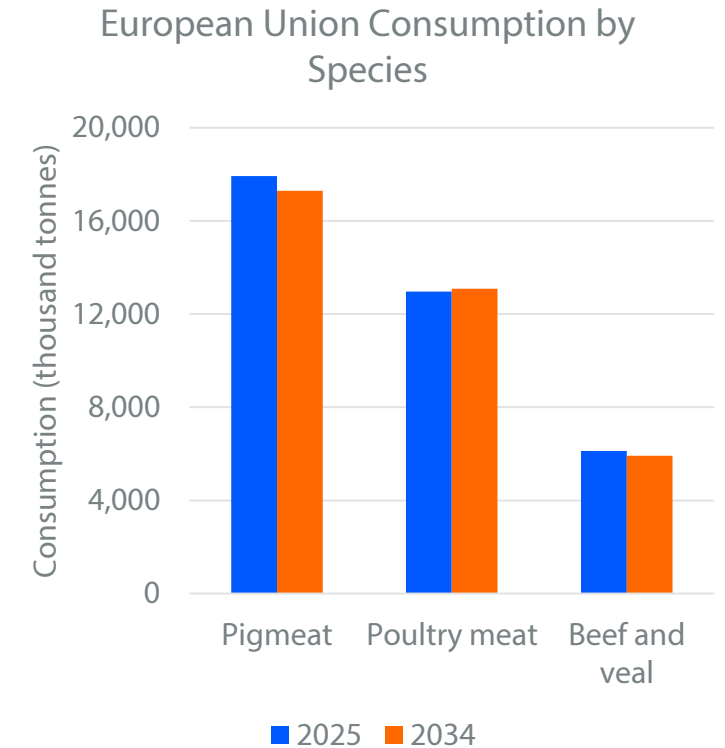
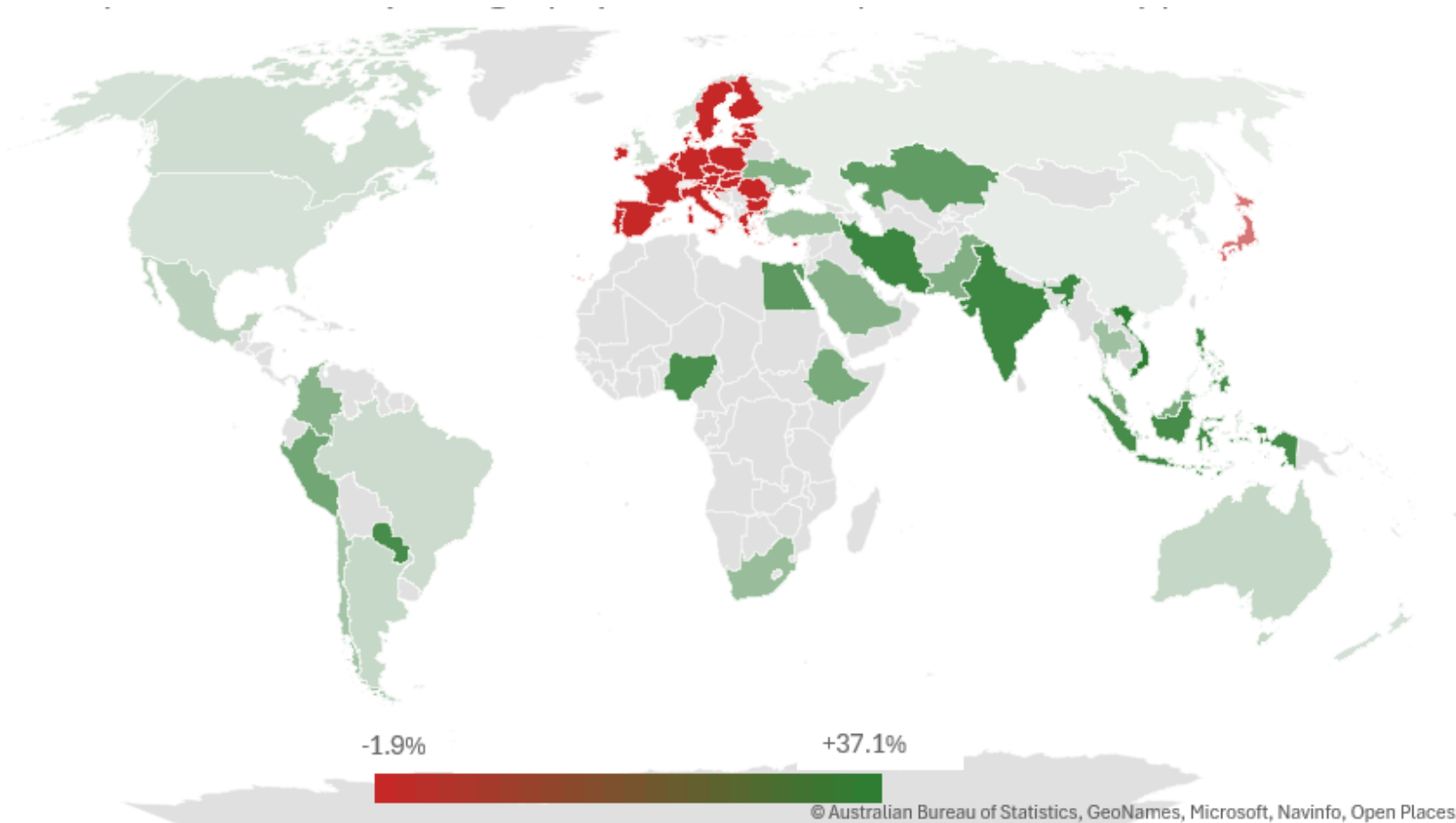


“Navigating the Future of Animal Protein in a Changing Global Landscape”

Eva Gocsik
Rabobank

Global animal protein demand to grow in the next decade

But Europe goes against the trend



Source: OECD-FAO, RaboResearch 2026

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Europe's population peaks, income growth slows

Finding growth in increasing volumes will be challenging

Region grouping by dynamics

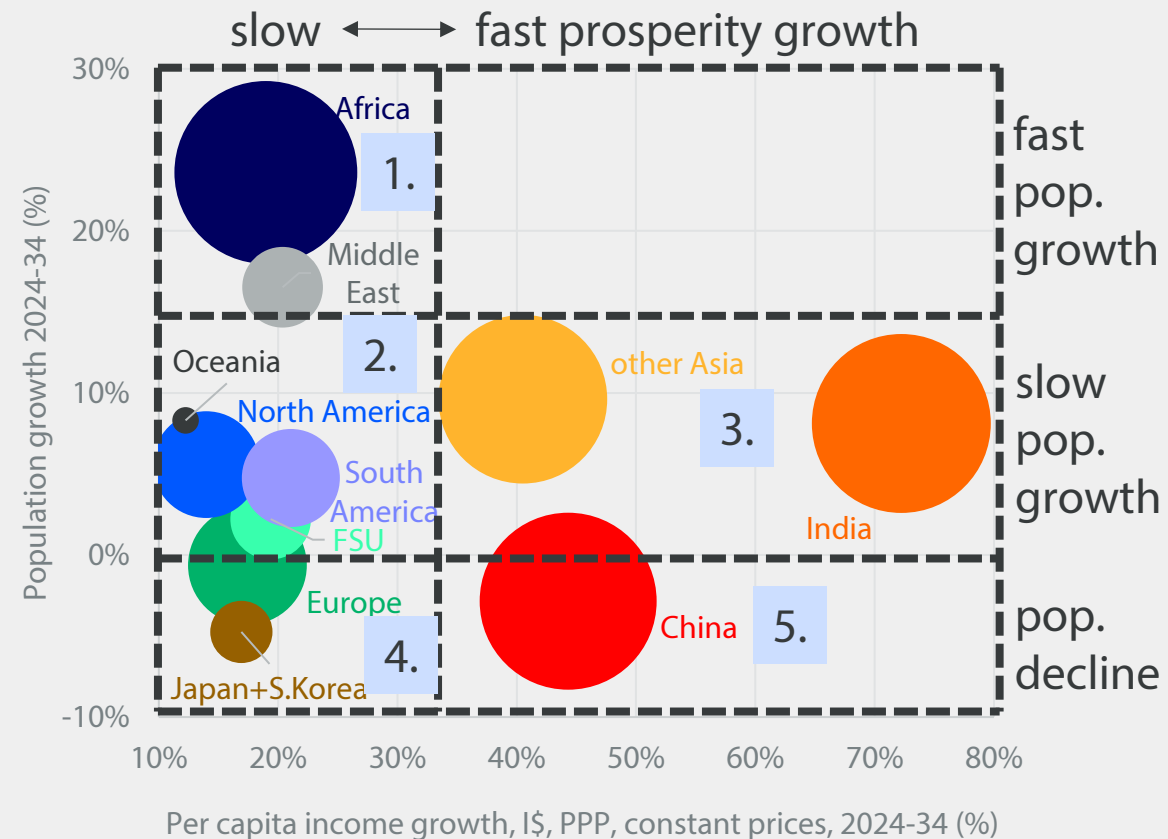
Group 1: **Booming laggards**: Fast growing population but little prosperity growth: Africa and the Middle East

Group 2: **Stable laggards**: Slow population growth and little prosperity growth: Oceania, North America, South America, FSU

Group 3: **Climbing the economic ladder**: Fast prosperity growth, slow population growth: Other Asia and India

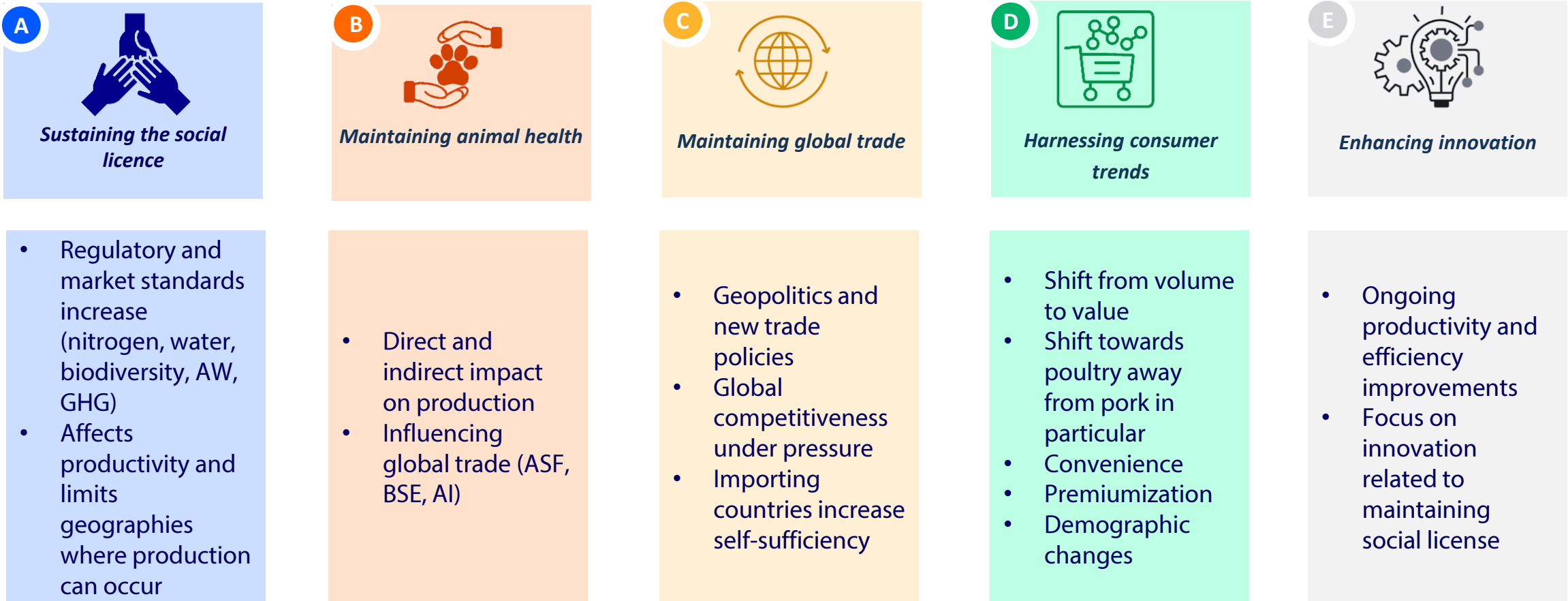
Group 4: **Shrinking laggards**: Declining population and little prosperity growth: Europe and Japan + South Korea

Group 5: **Shrinking but climbing**: Fast prosperity growth and population decline: China



Europe's AP market will be influenced by supply and demand side factors

Five major drivers will shape Europe's AP market



Social and environmental standards rise

EU policy and national governments set the direction



The strategy includes measures to create:

A **resilient**
livestock sector
prepared for
crisis

A **competitive**
livestock sector
in the EU and
globally

A **sustainable**
livestock sector
with high animal
welfare

A livestock sector
**fit for all farms
and regions**

Excellence
in livestock
production

Denmark's pig sector faces major reforms under new government - AHDB

Carbon tax, welfare changes could reshape European pork supply

Dutch cabinet agrees plan to slash nitrogen pollution levels

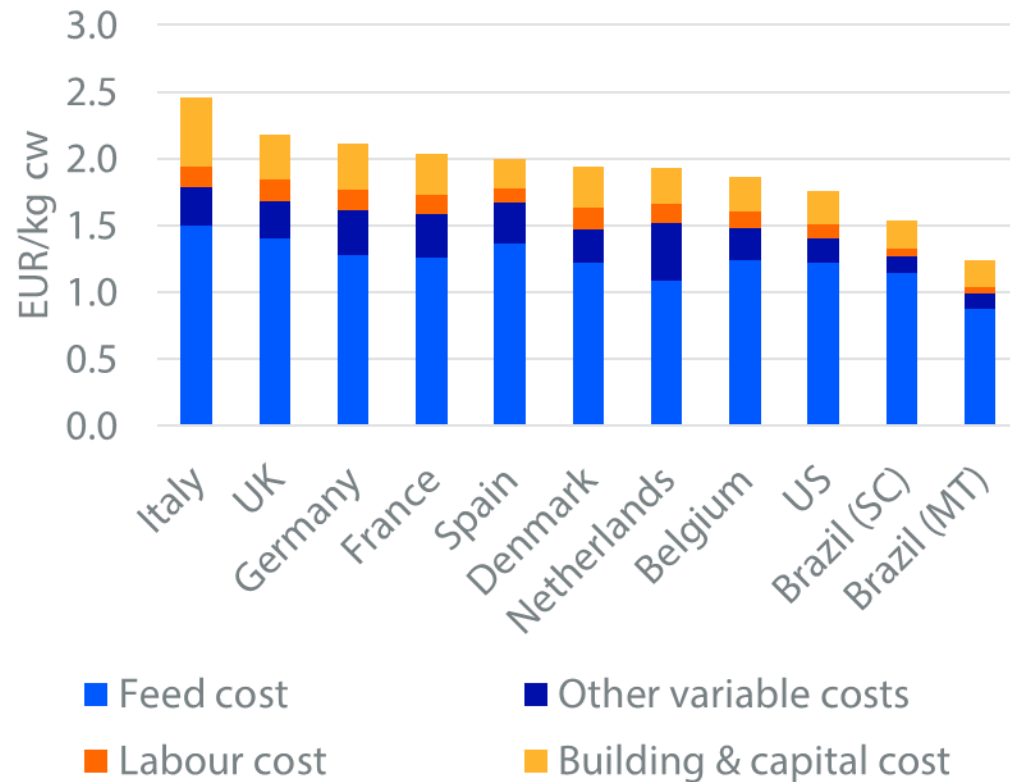
June 26, 2026

Defra announces biggest animal welfare reforms in a generation

Europe is a relatively high-cost producer

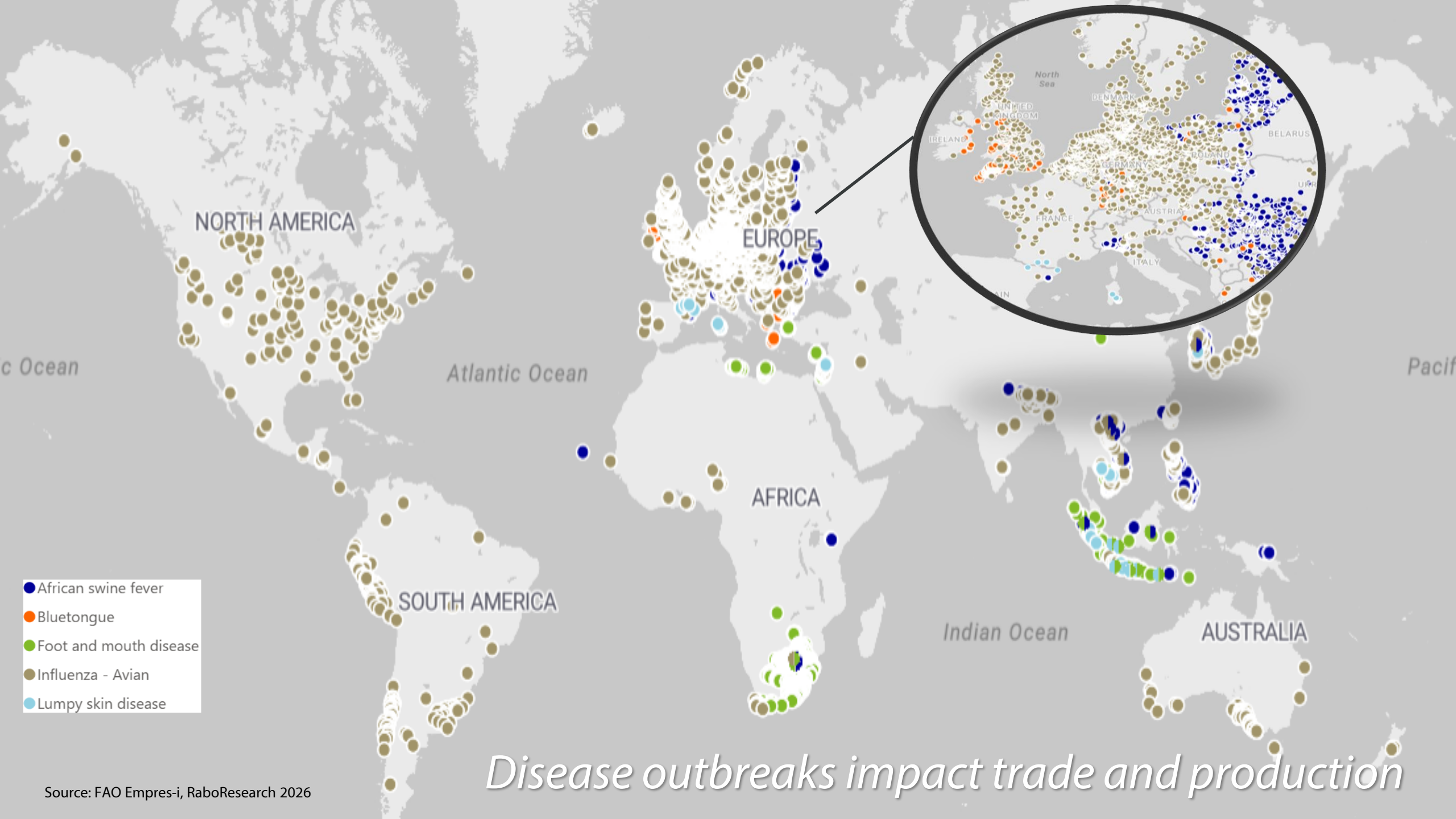
Tightening social and environmental demands may raise cost further in Europe

Pig production costs in Europe higher than in US and Brazil



Top3 low-cost chicken producers are outside the EU

	Cost price difference vs Germany
Brazil	-25/-30%
Ukraine	-20/-25%
Thailand	-15/-20%
Poland	-5/-10%
Hungary	-5/-10%
Netherlands	Same
Spain	Same
Italy	+3/+5%
United Kingdom	+3/+5%
France	+5/+7%
Denmark	+7/+9%
Sweden	+7/+9%

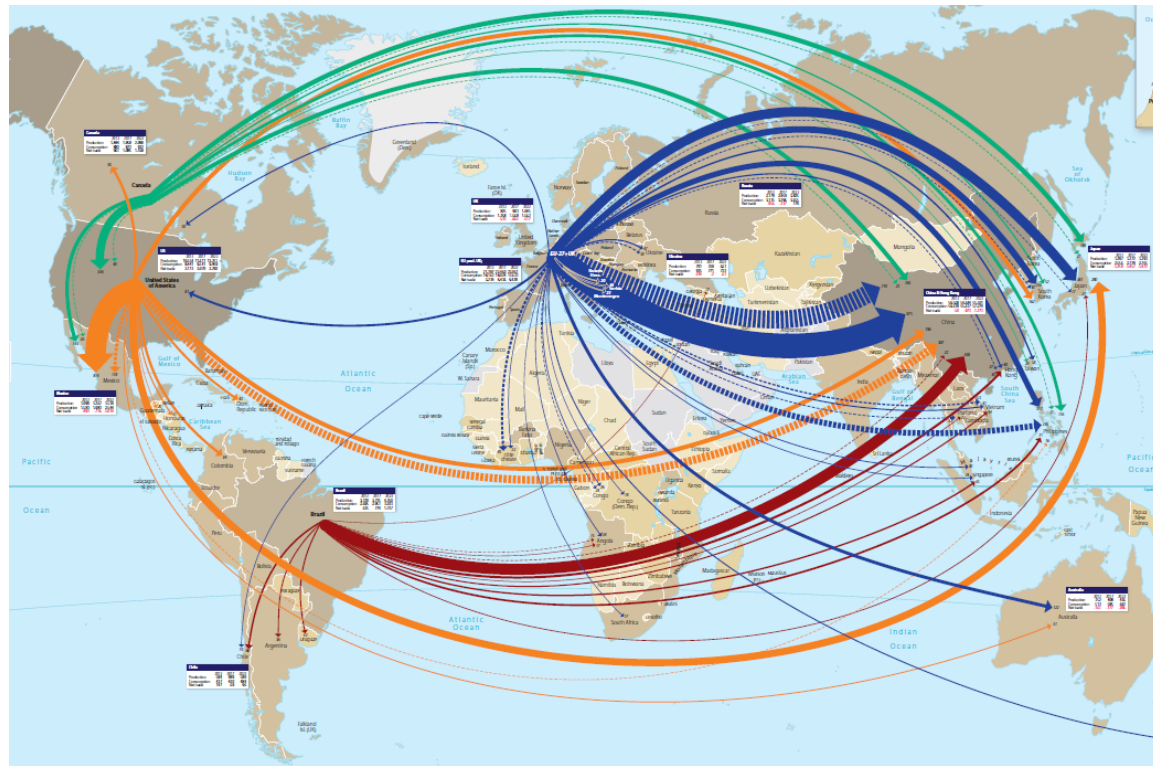


Disease outbreaks impact trade and production

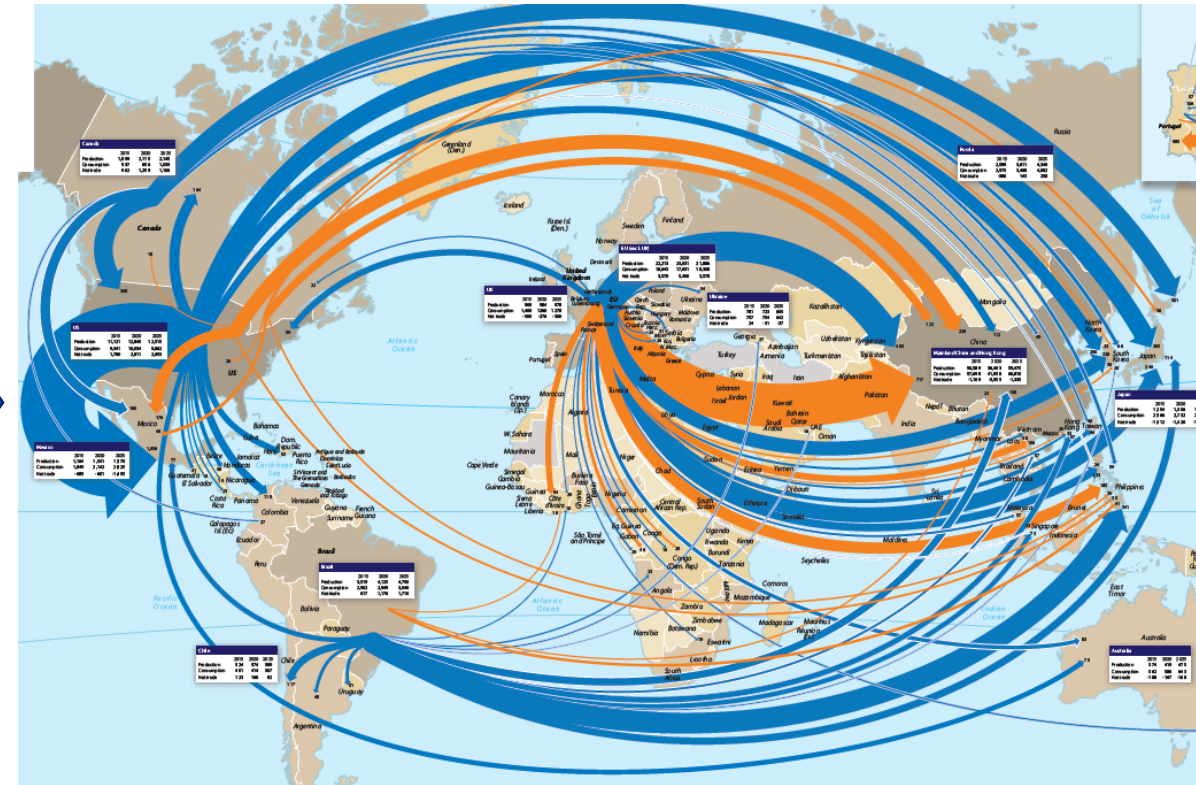
Pork trade slowing and shifting

Europe facing changes in global demand and increasing competition

2022



2025



Europe's animal protein sector is caught in the crossfire

of geopolitical tensions, rising protectionism, and shifting trade liberalization efforts

China's Comprehensive Retaliation
Against U.S. Tariffs

**China puts anti-dumping tariff of up to
18.9% on pork imports from EU**

**China introduces 55% safeguard
tariff on beef imports**

Deforestation law: Parliament
adopts changes to postpone and
simplify measures

Press Releases [PLENARY SESSION](#) [ENVI](#) 17-12-2025 - 12:31

**EU-Mercosur interim trade agreement
starts to provisionally apply**

European animal protein industry consolidates

As herd numbers decline for varying reasons

Danish Crown closing pork plant in Denmark



Danish Crown closes pork plant, as German pig production falls

By ALISTAIR DRIVER — January 24, 2023 2 Mins Read

Danish Crown to close slaughtering facility

Pilgrims UK confirms plant closures at Bury St Edmunds and Coalville

By Michelle Perrett
08-Nov-2022 - Last updated on 08-Nov-2022 at 13:32 GMT



Compaxo neemt slachtactiviteiten Pali Group over

12 december 2023 Zevenaar Slachterij en verwerking 1 reactie

News 16 June 26

Van Loon Group and Van Rooi receive final approval for merger

Vion to close German meat plant, sell three others

German meat giant Tönnies is to buy two of the factories.

Eszter Racz | January 16, 2024

ABP announces acquisition of German beef processing facility



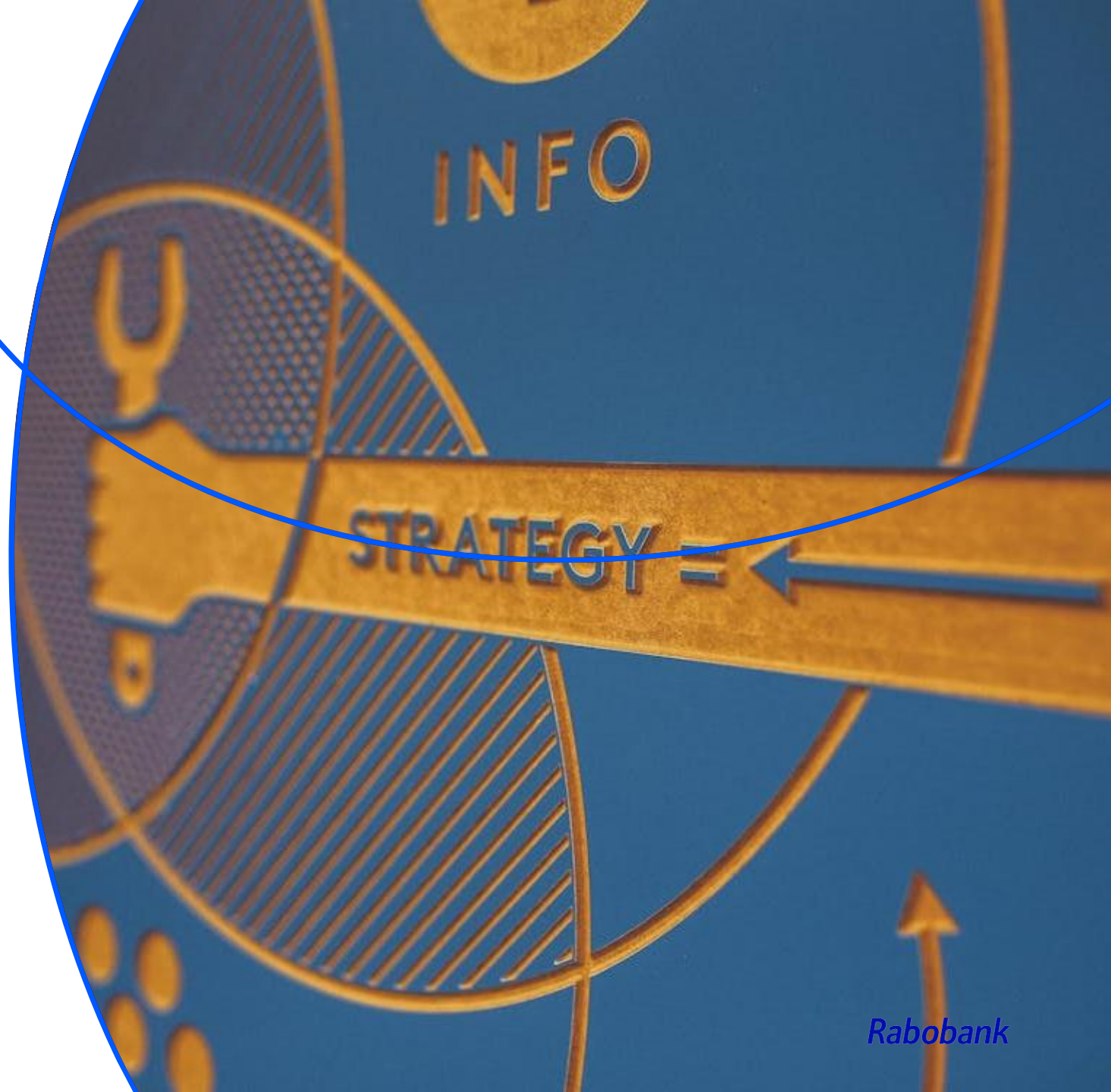
By Breifne O'Brien
May 1, 2026 7:17 PM

OSI Group Expands German Slaughter Operations with Acquisition of Vion's Waldkraiburg Facility

2026-04-22

How does the industry respond?

To remain successful



Innovation is nothing new to animal protein

Plenty is happening in upstream stages



Genetics

Ongoing genetic progress in animal performance
Breeding for robustness and lower methane emissions
New genomic techniques



Animal health & nutrition

Nutritional strategies that support animal health
Lower-carbon feed and precision nutrition
Pilots with different vaccine strategies (HPAI)



Technology & production systems

Manure management and biogas installations
Automation and new production practices (animal welfare)

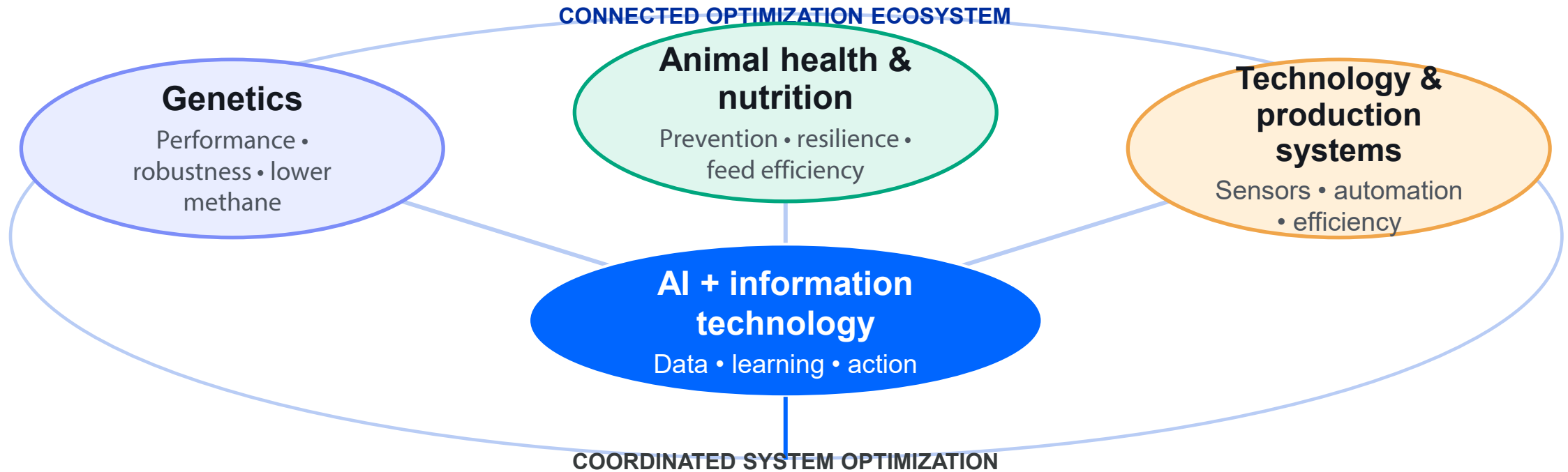


Measurement & digitalization

Precision sensing and data capture
Algorithms for early warning and decision support
Disease prevention and footprint calculations

AI has the potential to link innovation into one ecosystem

AI and shared data coordinate optimization across genetics, health and production



Higher added value

Cross-domain feedback removes hidden inefficiencies that point solutions cannot address alone.

Incentives needed to increase uptake of innovations

Supplier engagements focus on animal health, animal welfare, sustainability; but transition is not without risk

Industry

1

Denmark backs intact tails with €5.22 per pig

The scheme targets 3 million whole-tail pigs in 2027 and 6 million in 2028. (2026)

CoViVa makes March “Tail Month”

The Dutch pork-chain coalition puts extra focus on keeping pigs’ tails intact. (2026)

Upstream

2

Premium Food Group puts a price on healthier pigs

Bonuses reward healthy organs and intact tails; deductions penalize severe health problems.(2026)

Van Rooi shifts VOB pricing toward the market

The market-linked share rises from 50% to 62.9% as weekly demand trails supply. (2026)

Downstream

3

Albert Heijn funds lower-carbon pig and poultry chains

The retailer pays for a 3% CO₂ reduction in Beter voor Natuur & Boer supply chains. (2026)

Aldi raises chilled-meat welfare standards

All chilled meat and sausages move to higher welfare standards.(2023)

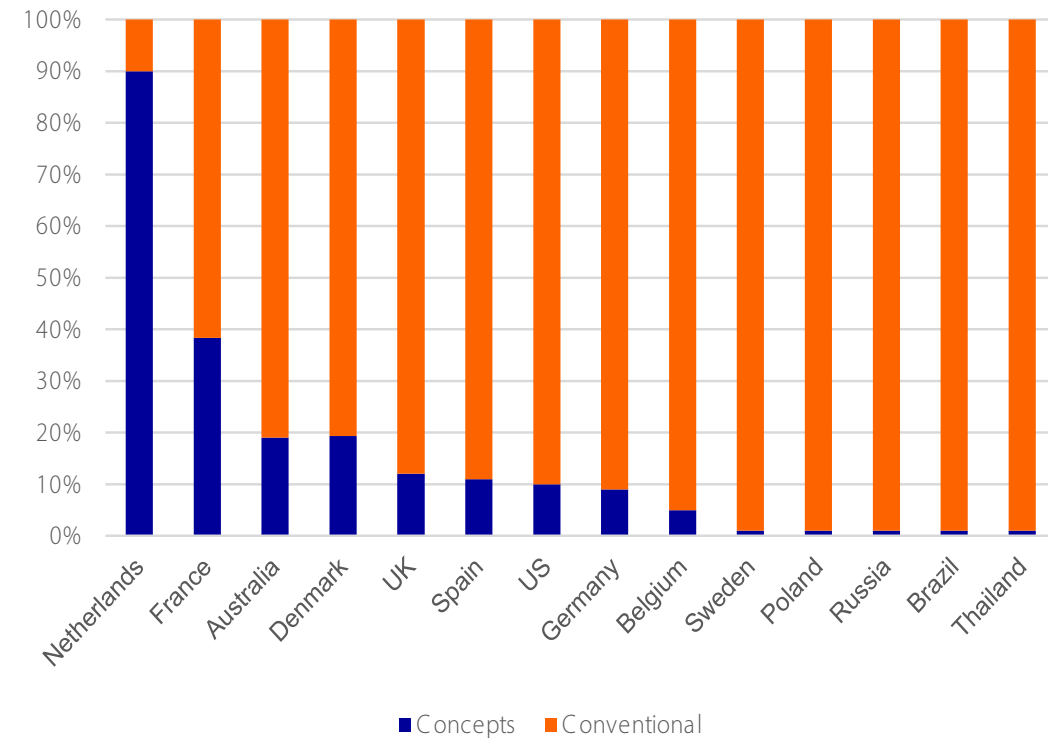
Sainsbury’s launches lower-carbon beef (2024)

Progress in some industries faster but not linear

Concept poultry share to rise from 8% to 15-20% in 2026



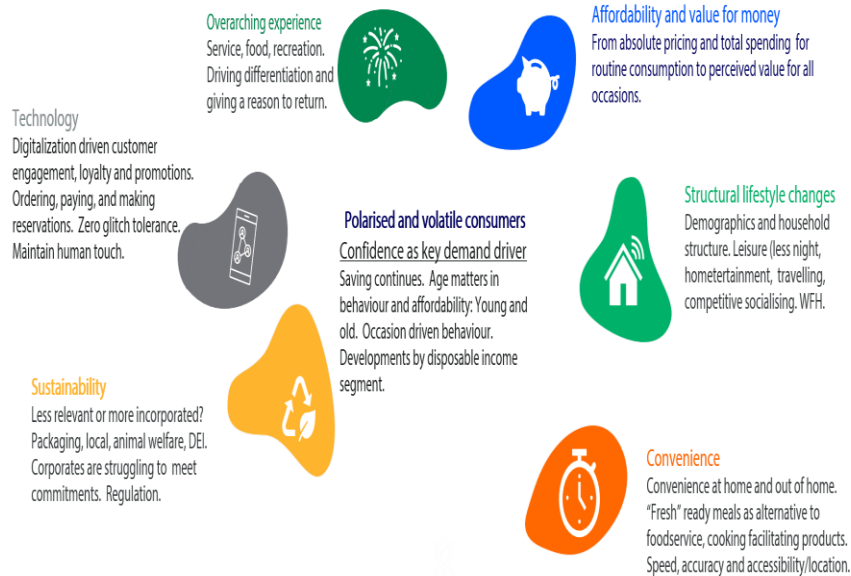
Concept prevalence varies by geography



Consumers need to remain in focus

To realize ROI on investments, product innovation needs to go hand in hand with shifting preferences

Key themes driving consumer food choices



Traditional approaches to add value remain



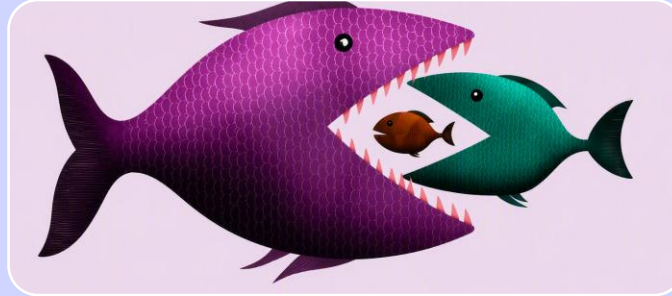
"Out-of-the box" products may also work



Key takeaways



Europe's AP sector
pressured from
different directions



Consolidation is
needed to reduce
inefficiencies



But innovation is key
to remain competitive
and address rising
environmental and
social demands



Contact details

Rabobank
RaboResearch
Food & Agribusiness

Office address
Croeselaan 18
3521 CB Utrecht

Postal address
P.O. Box 17100
3500 HG Utrecht
The Netherlands

 Rabobank	Rabobank Eva Gocsik, PhD Global Head Animal Protein
Mobile	+31 6 21572932
Email	eva.gocsik@rabobank.com

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A summary of the methodologies used by Rabobank can be found on our website.

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