



MARKET INSIGHTS

Spain consolidates its position as the world's leading producer and exporter in the pork sector¹

According to the latest Pork Barometer, Spain has consolidated its position as the world's leading producer and exporter of pork, recording a 4% increase in pig slaughtering during the first quarter of 2025 compared to the same period the previous year. This growth has led to a stronger presence in key markets such as China (+9.8%) and South Korea (+38.9%).

However, the sector is facing growing pressure on profit margins, due to stable prices in the domestic market and intense competition in both European and non-EU destinations. Additionally, the ongoing tariff war between the U.S. and China has hindered the recovery of certain pork products, such as belly cuts.

Meanwhile, the interprofessional organization INTERPORC has raised concerns over the risk of African Swine Fever (ASF) spreading and has issued a set of reinforced biosecurity measures for the entire production chain, including health controls, temporary import reductions, quarantines, disinfection protocols, and active surveillance. Although strengthened, the Spanish pork sector must quickly adapt to this new scenario in order to maintain its leadership position.

Analysis of the Fundación Valenciaport

The global pork sector: structure and international trade

As part of the agri-food sector, the **pork industry** plays a **crucial role** in the **global economy**. With its high **production efficiency**, it is not only a key component of the agri-food industry but also an **essential pillar** of **livestock farming** performance. However, the slowdown in Chinese pork production—largely due to the outbreak of African Swine Fever (ASF)—combined with the implementation of stricter environmental regulations in the European market, significantly impacted global output. That said, global production appears to be recovering, with a notable rebound in 2024, when total output reached 116.45 million tonnes.

In this context, the following table provides an overview of the **main pork-producing countries** worldwide. **China** continues to strengthen its position as the leading market, topping both production and consumption rankings, with a global production share of 49%, followed by the European Union (18%) and the United States (11%)—countries that hold the same positions in terms of **consumption**.

¹ Original news published by "Qcom" and available at: https://www.qcom.es/porcino/periodico-digital-qcom.es-el-punto-de-encuentro-de-la-cadena-agroalimentaria/espana-se-consolida-como-primer-productor-y-exportador-mundial-del-sector-porcino_71131_0_0_1_638892_55689016383000_in.html

Table 1: Top Pork-Producing and -Consuming Countries Worldwide

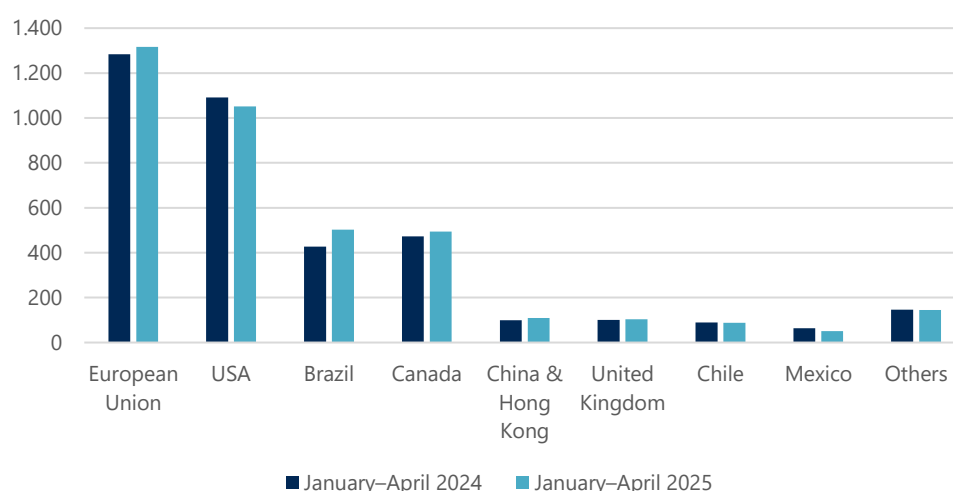
Country	% of Global Production	Total Production in 2024 (in thousand tonnes)	Total Consumption in 2024 (in thousand tonnes)
China	49%	57.060	58.269
European Union	18%	21.250	18.336
United States	11%	12.612	9.922
Brazil	4%	4.500	2.972
Russia	4%	4.315	4.098
Vietnam	3%	3.785	3.880
Canada	2%	2.090	-
Mexico	1%	1.590	2.844
South Korea	1%	1.455	2.176
Japan	1%	1.288	2.751
Rest	6%	5.501	6.740

Source: Own elaboration based on data from the United States Department of Agriculture

Likewise, focusing now on international trade, the following graph shows a breakdown of the **main pork-exporting countries**. The ranking places the **EU** in a **leading** position, supported by the high **production efficiency** of the European pork sector and its strong **sanitary standards**. In this context, the EU **exports** around **13%** of its total production, with the majority destined for the East Asian market—particularly **China**.

On the other hand, and close behind the EU, is the **United States**, which has managed to sustain an upward growth trend by capitalizing on the contraction of Chinese pork production. Meanwhile, **Canada and Brazil**—ranked third and fourth among the world's top pork exporters—have strengthened their positions as **strong competitors** in the sector during 2024. This is partly due to the growing uncertainty in the global economic landscape and the escalating tensions between the United States and China, which also had an impact on the EU pork industry.

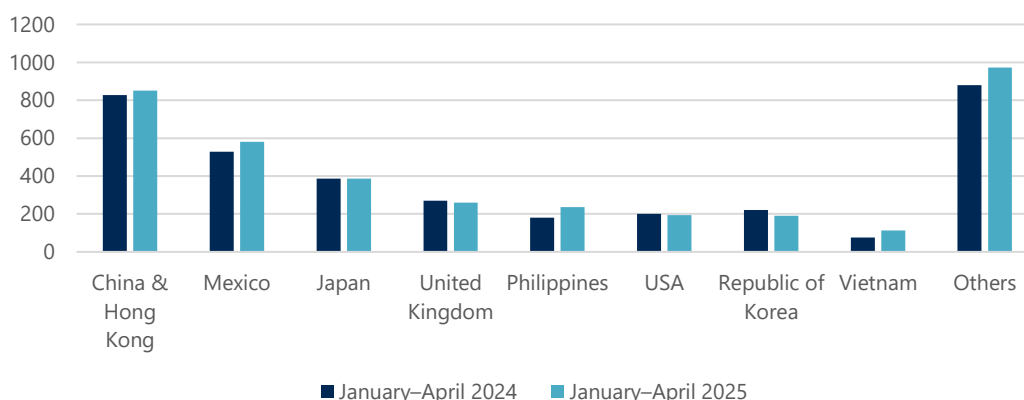
Graph 1: Leading Pork-Exporting Countries (in thousand tonnes)



Source: Own elaboration based on data from Eurostat

At the same time, in terms of **imports**, **China** continues to hold a prominent position as the **world's leading importer of pork**, a status largely attributable to the region's high domestic consumption. Together with Hong Kong, China's pork imports between January and April 2024 reached **827 thousand tonnes**. Similarly, for the same period in 2025, imports increased by approximately 3%. Additionally, Mexico, Japan, and the United Kingdom also play a significant role as major pork-importing countries.

Graph 2: Leading Pork-Importing Countries (in thousand tonnes)



Source: Own elaboration based on data from Eurostat

Given the growing importance of international trade in the development of the pork sector—both globally and regionally—it is essential to analyze the factors shaping this exchange. The following section examines the main elements that influence the management of **international trade**, from **current agreements** to **emerging risks** affecting the sector's **competitiveness**.

International Trade Management

International trade in the **pork sector** is shaped not only by the logic of **supply and demand** but also by an increasingly complex web of **regulations, agreements, and restrictions**. Beyond the numbers, understanding how this trade is structured is essential to anticipate trends and identify opportunities.

Today, pork internationalisation—especially from Europe, with Spain playing a leading role—takes place in a **context governed by multiple trade agreements** and shaped by commercial **barriers, geopolitical tensions**, and increasingly demanding **sanitary requirements**.

In this regard, **market opening** has been a **strategic** priority for the EU. Agreements such as **CETA** (Comprehensive Economic and Trade Agreement) with Canada, **treaties** with **Japan and South Korea**, and the recent **modernisation of the deal with Mexico** have paved the way by reducing tariffs and facilitating trade. Others, like the **EU–Mercosur** agreement, still pending ratification, hold great potential. In parallel, ongoing negotiations with India, Australia, and New Zealand could open **new trade routes** in the coming years.

However, opening markets does not guarantee access. Many countries still impose **tariffs** on specific products—particularly processed pork—and apply increasingly **strict non-tariff barriers**. **Requirements** related to **traceability, animal welfare, residue control, and sanitary protocols** are now standard in destinations like China, Japan, or South Korea, forcing European exporters to constantly adapt.

Complying with these standards—from Halal certifications to inspections by SENASICA (Mexico's National Service for Agri-Food Health, Safety and Quality)—involves an **operational burden**, but it also represents an **advantage**: it positions **European products** as **benchmarks** in **food safety and quality**.

All of this unfolds in an **unstable global environment**. The war in Ukraine, rising logistics costs, and mounting regulatory pressure around sustainability are reshaping the rules of the game. At the same time, **Asian demand** continues to grow, and many markets increasingly value European standards, opening up new opportunities for the sector.

Spain, in this context, has not only adapted but has positioned itself as one of the world leaders in pork exports, combining quality, responsiveness, and a commercial strategy focused on market diversification.

The Pork Sector in Spain: Structure and International Trade

In Spain, the pork sector continues to establish itself as a **key pillar** of the **national economy**. Its growth over recent decades has been especially significant, representing around **16% of Final Agricultural Production** and nearly **9.5% of industrial GDP** in the past year. Within the livestock segment, pork leads the way, accounting for nearly **44% of Final Livestock Production**.

Despite declines in production volumes in recent years—mainly due to a drop in exports to certain European markets—domestic production saw a strong rebound in 2024, reaching close to **5 million tonnes**. This positions Spain as the **leading pork producer in Europe**, with a production share of approximately 23.5%, ahead of Germany (20.31%) and France (9.93%).

At the same time, the sector has reinforced its position within the agri-food industry, posting **revenues of €25 billion** last year and generating over **415,000 jobs**.

In the current context, and facing growing international uncertainty, the Spanish pork industry has doubled down on **digitalisation, innovation, and technological investment**. Special emphasis has been placed on **automating** certain **processes** and **applying Artificial Intelligence** in livestock farms to sustain efficiency.

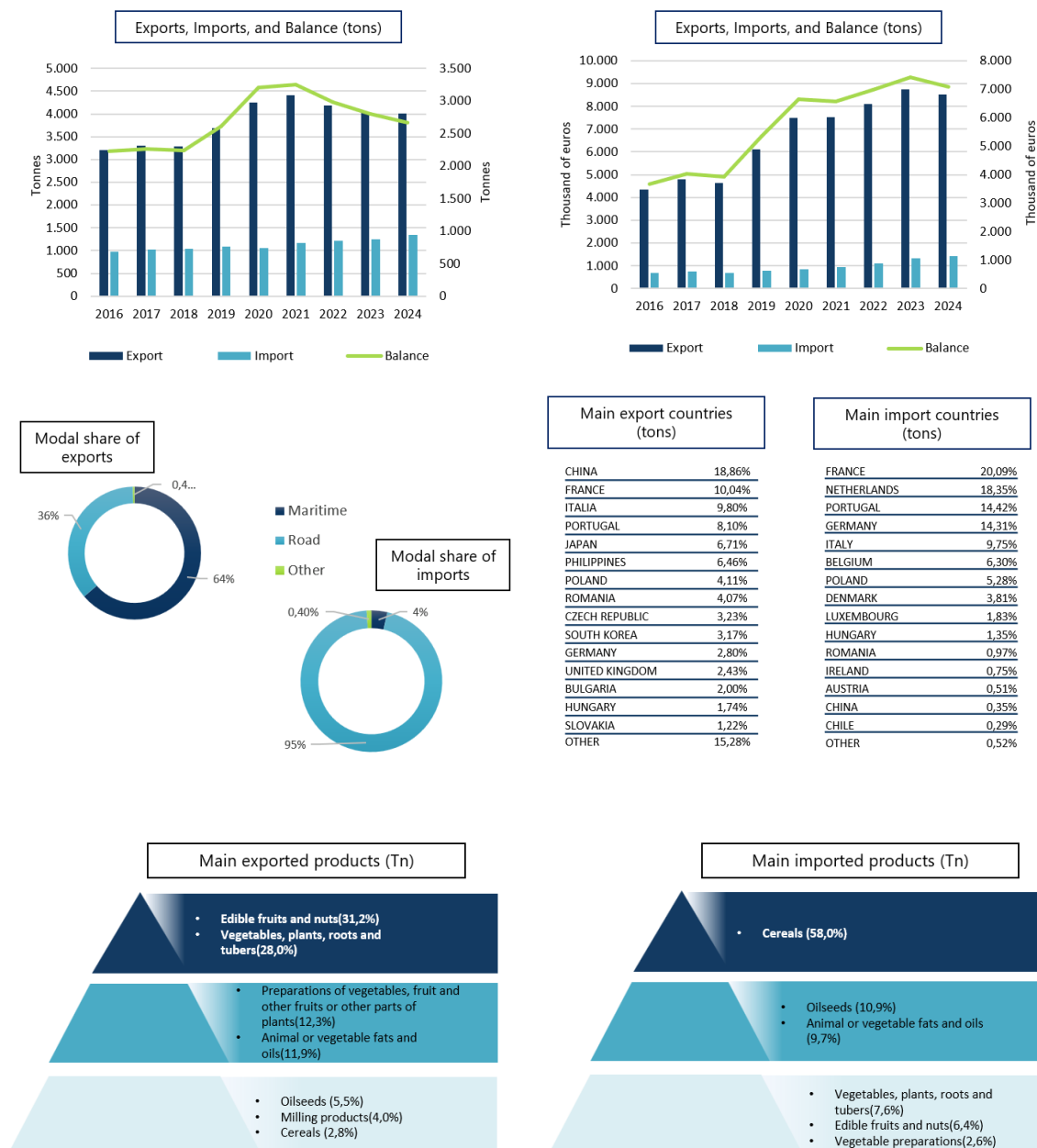
From a trade perspective, although **exports** have seen a slight decline in recent years, Graph 3 shows a **moderately upward trend** over the period. In 2024, Spanish pork exports reached nearly €8.52 billion, far exceeding imports, which totaled over €1.43 billion, resulting in a trade surplus of €7.09 billion. Similarly, in volume terms, a comparable trend is observed, with exports exceeding imports by close to 3 million tonnes.

Regarding **export destinations**, while the EU has historically been a key market for Spanish pork exports, the contraction of Chinese production and the significant rise in

its demand have pushed EU countries into second place. By 2024, **China** had become the **top destination for Spanish pork exports**, accounting for **18.86%** of total shipments. France and Italy followed, with export shares of 10.04% and 9.80%, respectively.

As for the main product categories in Spain's pork trade, in volume terms, the leading **export is fresh or chilled pork meat**, with a 65.27% share. Conversely, **live pigs** top the list of imports, accounting for 27.32%.

Graph 3: Spanish Pork Sector International Trade in Figures

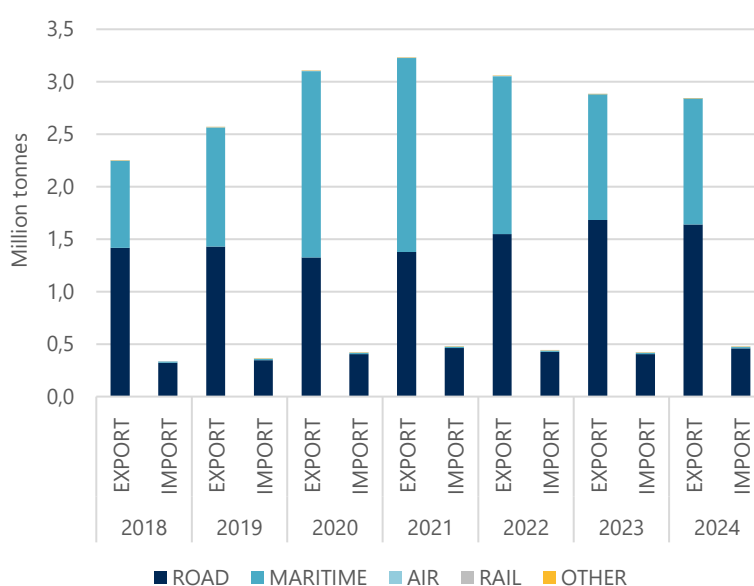


Source: Own elaboration based on data provided by the Spanish Tax Agency (Agencia Tributaria)

The Role of Maritime Transport in the International Trade of the Pork Sector

Maritime transport plays a key role in the pork sector's logistics chain in Spain, especially in **connecting with non-EU markets**. While **road transport** remains the dominant mode in terms of total volume, **maritime traffic** has gained significant ground in recent years and has become a strategic channel to meet international demand. Between 2018 and 2024, road transport maintained its leadership in both exports and imports. However, during 2020 and 2021, amid an **exceptional surge in demand and disruptions in global supply chains**, maritime transport temporarily surpassed road transport in export volume, reaching a peak of over 1.8 million tonnes in 2021 (Graph 4).

Graph 3. Modal Share in Pork Sector Exports and Imports.



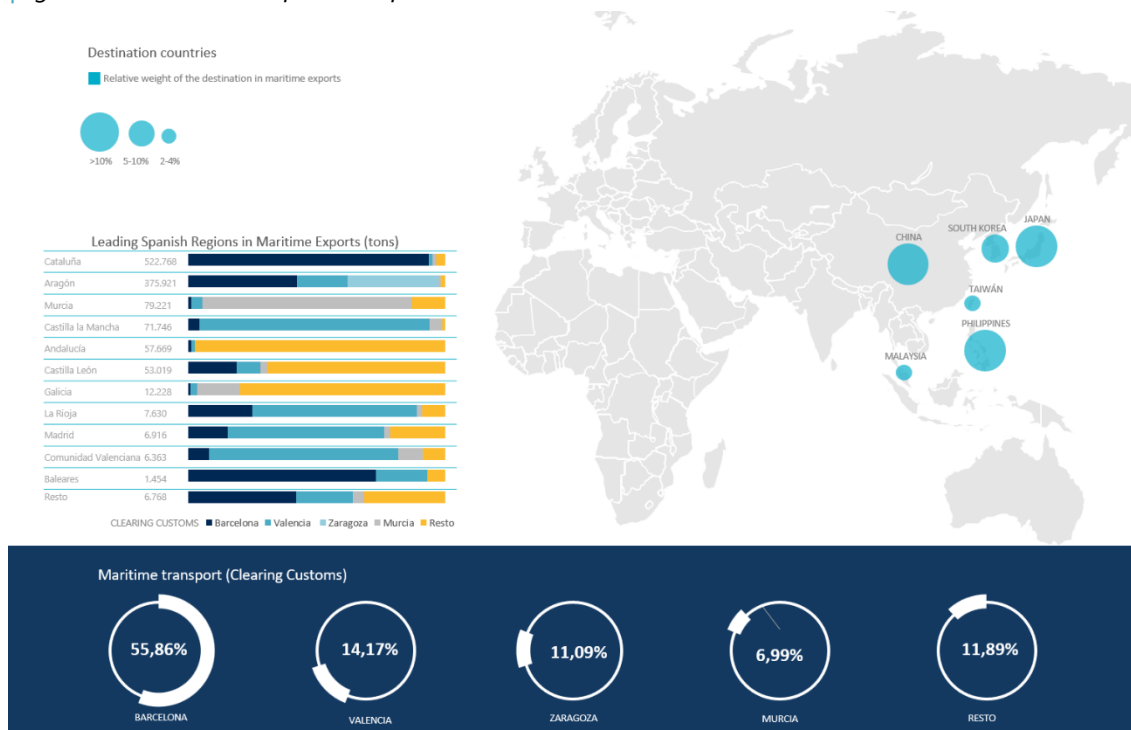
Source: Own elaboration based on data provided by the Spanish Tax Agency (Agencia Tributaria)

Once the key role of maritime transport in pork exports has been established, it becomes essential to **characterize its structure and scope**, as shown by the data in Figure 1. Maritime exports are primarily destined for **Southeast Asia**, with China, Japan, South Korea, the Philippines, and Taiwan as the main destinations. This **geographical concentration** requires robust logistics chains capable of preserving the product throughout long-distance journeys.

From the perspective of origin, the most active **autonomous communities** in maritime exports are Catalonia, Aragon, Murcia, and Castilla-La Mancha. Although many operations are managed through ports located near these regions, there is also a **growing participation of inland customs offices**, reflecting a distributed logistics structure based on platforms well connected to seaports. This network confirms the

strategic value of both coastal hubs and inland logistics areas in supporting the international trade of pork.

Figure 1. Pork Sector Exports in Spain, 2024



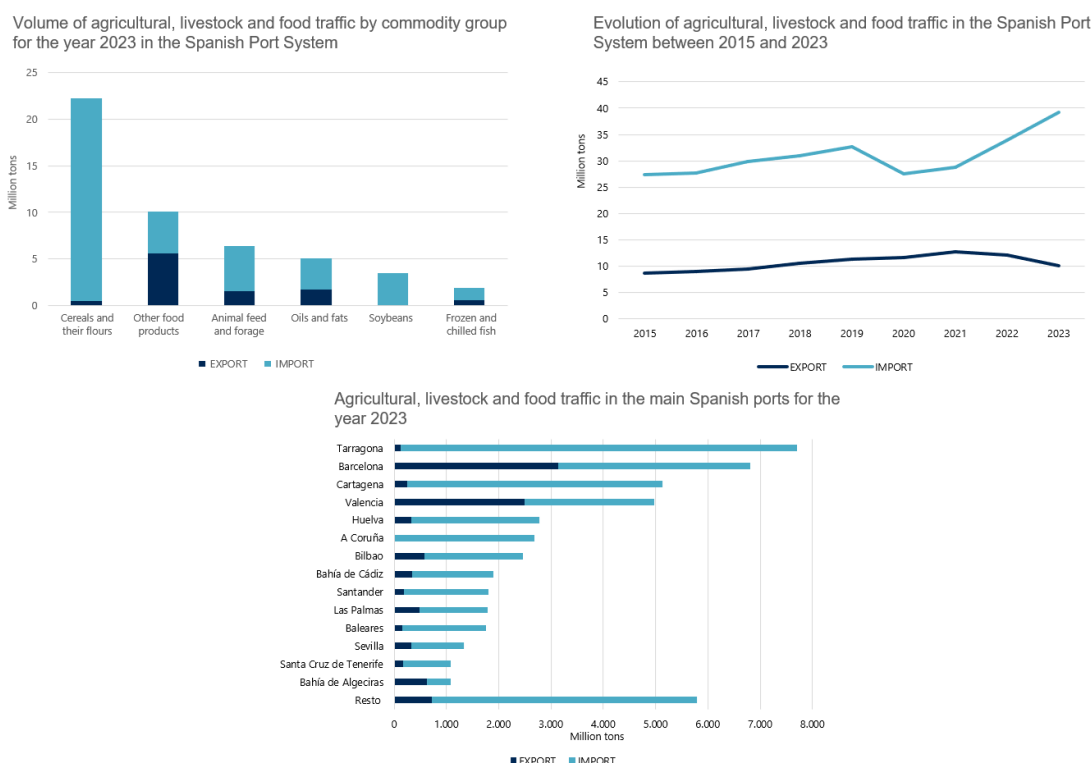
Source: Own elaboration based on data provided by the Spanish Tax Agency (Agencia Tributaria)

Maritime transport provides **capacity, flexibility, and global reach** to an increasingly export-oriented industry. In this context, the **Spanish port system** plays a crucial role not only in the export of finished products but also in the import of essential inputs for production, such as cereals, meals, and soybeans needed for feed manufacturing.

Although port statistics do not allow for completely precise isolation of pork-related flows, they do reflect their indirect weight within the **broader agri-food and livestock traffic** (Figure 2). According to data from Puertos del Estado, the **most relevant categories** in this area—such as feed, cereals, and soybeans—are directly linked to pork production and exports.

The evolution of these traffic flows in recent years demonstrates the **sector's strength**, with **Mediterranean ports** playing a leading role, including Tarragona, Barcelona, Cartagena, and Valencia. The latter has consolidated its position as a strategic logistics platform for agri-food trade, both for the import of raw materials and the export of high value-added processed products.

Figure 2: Port Traffic in the Agri-Food and Livestock Sector



Source: Own elaboration based on data provided by Puertos del Estado

Although official statistics do not always allow for the precise isolation of pork sector products, it is clear that a significant portion of this industry's international trade relies directly on **port logistics services**. The availability of regular maritime shipping lines, the presence of operators specialized in refrigerated cargo, and the customs infrastructure at major ports enable efficient handling of the demands of global agri-food trade.

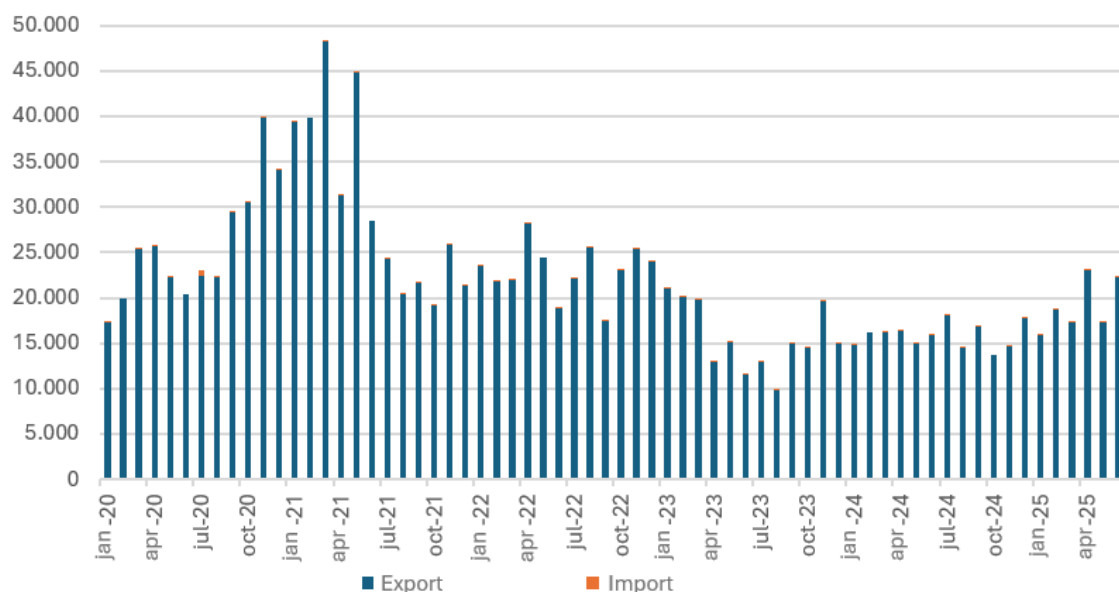
Within the Spanish port system, the **Port Authority of Valencia (APV)** holds a prominent position as a **logistics hub** for the agri-food sector. Its strategic location, facilities adapted for refrigerated cargo and dry bulk, and strong intermodal connectivity make the port a key point for both imports and exports in this sector.

Thanks to filtering by tariff codes, it has been possible to precisely define **maritime traffic related to pork at the APV**. The analyzed tariff codes include 0103 (live animals), 0203 (fresh, refrigerated, or frozen pork meat), and 0206 (edible offal), which together accurately represent the logistical dimension of the pork industry.

Between January 2020 and April 2025, traffic managed by the APV shows a **clear export orientation** (Graph 5). Loading operations significantly exceed unloading in both volume and frequency. The most active period was between late 2020 and mid-2021, when monthly peaks surpassed 50,000 tonnes, driven by strong international demand,

especially from Asia. From 2022 onwards, volumes stabilized with a slight downward trend, influenced by **the normalization of logistics flows** after the pandemic, **changes in Asian demand, and rising costs**. Nevertheless, export traffic remained solid throughout the period, with a visible rebound in the early months of 2025, possibly signaling a new phase of dynamism.

Graph 4. Port Traffic in the Agri-Food and Livestock Sector



Source: Own elaboration based on data provided by the Port Authority of Valencia (APV)

The analyzed data confirm the strategic role of the Port of Valencia as a key logistics platform for the international trade of the Spanish pork sector. Its export-oriented focus, centered on processed meat products and highly containerized operations, positions it as an efficient and specialized hub, especially in its connection with Asian markets. The stability of traffic, despite international volatility, demonstrates the resilience of the port infrastructure and its ability to adapt to new dynamics in global trade. In this context, the consolidation of the Port of Valencia as a pork logistics hub strengthens its importance within the Spanish port system and as a competitiveness driver for the entire agri-food supply chain.