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Foot-and-Mouth Disease (FMD) in Europe - situation update in Europe

Since 2025, Europe has reported several FMD events after years without cases in the European Union. In parallel, serotype SAT1 (historically uncommon in much of Western Eurasia) has expanded from the Near East towards Europe, including detection in Türkiye (May 2025, near the Iraqi border) and, later, outbreaks in the Eastern Mediterranean in 2026. This has increased perceived risk of introduction/spread in south-eastern Europe and has driven intensified surveillance, movement controls, and preparedness measures, including access to appropriate vaccine antigens for rapid response.

Timeline of Key Outbreaks:

- **Cyprus (February 2026):** FMD outbreaks notified; confirmed serotype SAT1. The European Commission reported the provision of SAT1 vaccine doses to support response operations.
- **Greece (March 2026, Lesbos Island):** confirmation of an FMD outbreak with identification of SAT1 and adoption of emergency measures (restricted zones and EU-level veterinary support).
- **Germany (January 2025):** FMD outbreak, serotype O (case in water buffalo); status subsequently reported as restored to FMD-free.
- **Hungary and Slovakia (March 2025):** FMD outbreaks, serotype O, close to their shared border; control measures were implemented and both later regained FMD-free status in 2025.
- **Regional context (2025–2026):** international bodies (WOAH/FAO/EuFMD) highlighted the expansion of SAT1 beyond its historical range and recommended strengthened risk assessment, surveillance, and preparedness.

Country	Date	Serotype	Status
Germany	January 2025	O	Contained, FMD-free status restored
Hungary / Slovakia	March 2025	O	Border outbreaks, controlled
Turkey	May 2025	SAT1	Re-emerging after decades of absence
Cyprus	February 2026	SAT1	Vaccination + EU support
Greece (Lesbos)	March 2026	SAT1	Restricted zones implemented

Chart 1: Key Outbreak Events FMD

Outbreak & control

Detection of FMD (SAT1 or O) → restriction zones (protection/surveillance) → stamping-out and/or emergency vaccination → heightened biosecurity & cleaning/disinfection

Local dairy supply & operations

Clinical disease (yield ↓) + culling (herd size ↓) → milk availability → in affected zone
Movement controls → tanker routing constraints / collection delays → processing disruptions & extra costs ↑ → occasional diversion/dumping risk ↑

Prices & trade effects

Local volatility ↑ (farm-gate/spot) → intra-EU re-routing partially offsets shortages (where feasible).
If market-access restrictions widen or persist → exportable surplus ↓ / sourcing shifts → risk premium ↑ in storable commodities (SMP/WMP, butter, AMF) → global price volatility ↑

- **SAT1 serotype and susceptibility:** the SAT1 detection in Türkiye (May 2025) described in this document aligns with international alerts about SAT1 expanding beyond its historical range. The appearance of SAT1 in the Eastern Mediterranean (Cyprus and Greece, 2026) reinforces the need to sustain vigilance in the wider region.
- **Introduction pathways:** risk increases with movements of animals and products, vehicle/equipment traffic, and indirect contamination via fomites. The base document already highlights efficient spread via contact and airborne routes, and the role of fomites.
- **Typical EU response measures:** stamping-out, movement restrictions, zoning (protection/surveillance), and—where appropriate—emergency/suppressive vaccination to support rapid control.
- **Practical recommendations:** strengthen biosecurity on farms and in transport (cleaning and disinfection), reinforce clinical awareness and early reporting; regularly review risk assessments and contingency plans.

Market Impact Assessment: EU Cow's Milk Market and Global Extrapolation (as of April 2026)

The market impact of foot-and-mouth disease (FMD) on cow's milk is driven less by consumer demand (FMD is not a food safety issue) and more by supply-side shocks and market-access constraints: (i) direct production losses in infected herds (temporary yield drops, fertility setbacks), (ii) culling (stamping-out) and the time required to rebuild herds, (iii) movement restrictions that disrupt milk collection and animal logistics, and (iv) loss (or partial loss) of "FMD-free" status that can trigger trade limitations for live animals and certain animal products. The magnitude of impact depends on outbreak scale, geography (density of dairy regions), and the policy choice between stamping-out only vs. combining with emergency vaccination.were implemented and both later regained FMD-free status in 2025.

EU cow's milk market impact (local)

- **Local supply shock is geographically concentrated.** The EU outbreaks reported since 2025 have been limited to specific zones/islands. Therefore, EU-wide raw milk volumes are unlikely to move materially unless outbreaks reach major dairy basins. However, local milk availability can fall sharply if large dairy holdings are culled or collection is interrupted by restriction zones.
- **Farm-gate price effects are asymmetric.** In affected areas, farmers may face immediate income loss (milk discarded due to movement restrictions, reduced yields, herd depopulation). In non-affected areas, tighter supply and higher risk premia can support higher farm-gate prices, particularly for spot milk. The net EU-level price effect depends on how quickly milk can be re-routed and processed.
- **Processing and logistics constraints matter.** Restriction zones (e.g., protection/surveillance radii) can complicate tanker routing, staffing, and on-farm access. Even if milk is safe, movement controls on susceptible animals and their products can delay collection, increase costs (biosecurity, disinfection), and lead to temporary dumping or diversion to lower-value uses.
- **Intra-EU trade typically re-optimizes rather than collapses.** When only a region is restricted, the EU single market can partially offset local shortages through reallocation of raw milk and dairy commodities. That said, "friction" increases: more documentation, testing, route constraints, and sometimes precautionary purchasing by buyers.
- **Case example (Mediterranean islands, 2026):** Public reporting on the Cyprus response indicates substantial culling alongside vaccination (EU-supplied vaccine doses) and a large compensation/support package, illustrating how FMD can translate into local milk production loss and a need for public financial support while the sector rebuilds.
- **Risk premium and hedging behaviour.** Even with small outbreaks, the combination of (a) uncertainty about spread and (b) policy-driven movement restrictions can increase volatility in dairy ingredient pricing (butter, SMP/WMP), especially where buyers build inventories.

Channel	Mechanism	Expected Local Impact
On-farm milk output	Clinical disease reduces yield; secondary effects on reproduction and condition	↓ (temporary; can be severe in affected herds)
Herd size (culling)	Stamping-out removes producing animals; rebuild takes months/years	↓ (medium-term supply loss in affected zones)
Collection & processing logistics	Restricted zones, disinfection, route changes, labour constraints	Costs ↑; risk of temporary dumping/diversion ↑
Prices (farm-gate/spot)	Local scarcity + uncertainty vs. local distress selling/milk disposal	Volatility ↑; direction depends on policy/logistics
Trade and market access	Status and zoning rules affect eligible flows	Potential constraints on some flows; substitution to domestic/ EU market

Chart 2: Impact channels (EU market) and expected direction

Global extrapolation (world dairy market)

- **Global transmission is primarily through trade rebalancing, not consumer avoidance.** When an exporting region faces restrictions (or buyers adopt precautionary sourcing rules), import demand shifts to alternative suppliers (e.g., other EU Member States outside restricted zones, New Zealand, the United States, or Latin America), tightening availability and lifting international prices for storable dairy commodities (SMP/WMP, butter, AMF).
- **EU outbreaks can matter disproportionately if they hit major exporting basins.** Small, localised outbreaks (islands or border regions) mainly create local disruptions. A wider epizootic affecting large dairy regions would reduce exportable surplus, potentially increasing global benchmark prices and volatility.
- **Risk premia and policy uncertainty amplify volatility.** Even without large volume changes, uncertainty about zonal eligibility, duration of measures, and vaccination policy can lead traders and processors to build inventories, widening spreads between spot and forward prices.
- **Endemic regions already embed FMD costs into global supply curves.** In parts of Africa, the Middle East and Asia where FMD is endemic, ongoing productivity losses and vaccination costs are structural. Periodic surges or new serotypes (e.g., SAT1 moving into previously unexposed populations) can temporarily raise regional milk deficits, increasing import needs for milk powders and butterfat.
- **Net global outcome:** typically higher price volatility with a modest upward bias for tradable dairy commodities under "containment but recurring outbreaks"; a more pronounced upward move if outbreaks broaden into major exporting areas or trigger sustained multi-market restrictions.

Horizon	EU Local Market (Raw Milk)	Global Dairy Market
0-3 months	Disruption driven by movement restrictions, collection logistics, and immediate culling; sharp local income shock possible; spot volatility ↑	Limited volume effect unless trade bans broaden; sentiment-driven volatility ↑ for powders/ butter; buyers diversify origins.
3-18 months	Rebuilding herds and restocking constrain supply in affected areas; investment delays; higher biosecurity costs persist.	If outbreaks expand into major exporters, reduced exportable surplus and sustained risk pre-mia can lift benchmark prices; otherwise effects fade as supply chains re-route.

Chart 3: Scenario overview

Resources

- **European Commission (DG SANTE):** information on outbreaks and FMD control measures (including updates on Greece and Cyprus, 2026).
- **WOAH (WAHIS) notifications and communications** on the international expansion of SAT1 (April 2026)**.**
- **FAO:** rapid risk assessments (SAT1) and EuFMD materials on regional risk and preparedness.
- **Spanish Ministry of Agriculture (MAPA):** technical note/update on the situation in south-eastern Europe (April 2026) and biosecurity recommendations.
- **European Commission (DG SANTE)** interview/overview on EU measures and trade protection during the 2025 FMD events (published 16 April 2025).
- **European Parliament Research Service (EPRS), briefing:** Foot and mouth disease: Fresh cause for concern (January 2025).
- **DEFRA (UK), Foot and mouth disease (FMD) in Cyprus and Greece,** preliminary outbreak assessments (published 26 March 2026; updated 24 April 2026).
- **British Agriculture Bureau, update: FMD in Cyprus and Greece (19 March 2026) –** figures on culling, vaccination coverage, and compensation package as publicly reported.
- **National Audit Office (UK), report:** The 2001 Outbreak of Foot and Mouth Disease (June 2002) – historical benchmark on economy-wide costs in a large-scale event.