

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

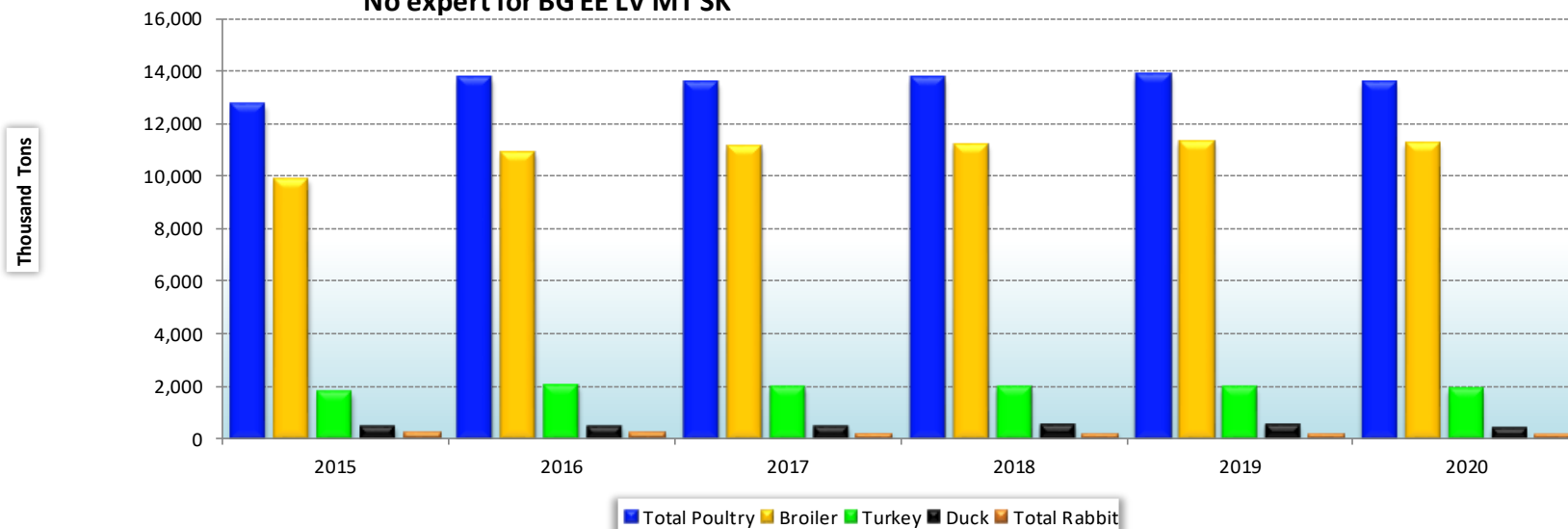
22 July 2020

FORECAST

Experts EU production forecast on Poultry and Rabbit

Missing or incomplete data for BE EL HR LT NL SI

No expert for BG EE LV MT SK



	2015	2016	2017	2018	2019	2020	% 2019/ 2018	% 2020/ 2019
Total Poultry	12,699	13,747	13,577	13,718	13,886	13,558	+ 1.2%	- 2.4%
Broiler	9,877	10,885	11,106	11,172	11,318	11,206	+ 1.3%	- 1.0%
Turkey	1,789	1,990	1,937	1,921	1,947	1,889	+ 1.4%	- 3.0%
Duck	474	477	439	517	511	395	- 1.3%	- 22.7%
Total Rabbit	243	228	210	191	180	171	- 5.6%	- 5.3%

EU market situation for Poultry
22 July 2020




































FORECAST

EU production of poultry (expert forecast Spring 2020)

Source : Experts WG

Qty in Tonnes

% change

	2018	2019	2020	%2019/2018		%2020/2019	
PL	2 582 290	2 706 940	2 647 400		4.8		-2.2
DE	1 821 600	1 833 500	1 750 500		0.7		-4.5
FR	1 790 400	1 760 300	1 646 200		-1.7		-6.5
ES	1 427 200	1 373 600	1 419 500		-3.8		3.3
IT	1 314 000	1 324 000	1 338 000		0.8		1.1
NL	1 119 000	1 119 000	1 119 000		0.0		0.0
HU	668 650	687 980	596 990		2.9		-13.2
RO	423 000	465 000	415 000		9.9		-10.8
BE	424 800	416 800	420 400		-1.9		0.9
PT	341 700	348 300	345 000		1.9		-0.9
IE	217 000	233 000	237 000		7.4		1.7
SE	222 100	228 800	228 400		3.0		-0.2
CZ	192 800	195 500	196 500		1.4		0.5
EL	192 000	192 000	192 000		0.0		0.0
DK	158 500	168 500	166 500		6.3		-1.2
FI	136 400	140 400	144 400		2.9		2.8
AT	138 589	139 130	139 530		0.4		0.3
LT	140 000	140 000	140 000		0.0		0.0
BG	102 000	102 000	102 000		0.0		0.0
SK	86 000	86 000	86 000		0.0		0.0
HR	83 000	84 500	84 500		1.8		0.0
SI	69 450	71 370	74 740		2.8		4.7
CY	25 580	26 900	26 900		5.2		0.0
LV	21 000	21 000	21 000		0.0		0.0
EE	15 000	15 000	15 000		0.0		0.0
MT	6 000	6 000	6 000		0.0		0.0
EU	13 718 059	13 885 520	13 558 460		1.2		-2.4

FORECAST

EU production of duck (expert forecast Spring 2020)

Source : Experts WG

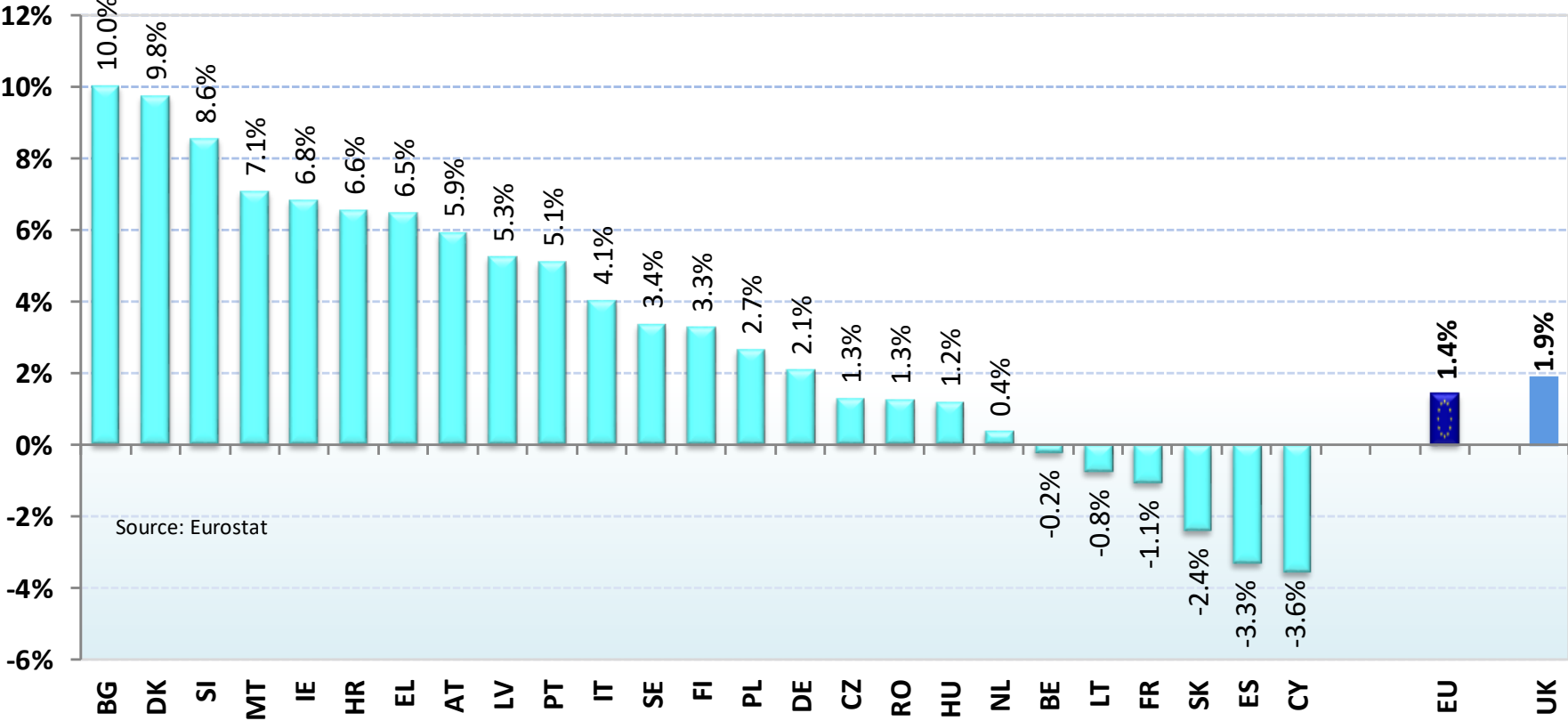
Qty in Tonnes

% change

	2018	2019	2020	%2019/2018		%2020/2019	
FR	226,300	220,700	165,500	-2.5		-25.0	
HU	122,900	118,390	60,370	-3.7		-49.0	
PL	44,960	52,200	53,000	16.1		1.5	
DE	41,400	39,100	36,000	-5.6		-7.9	
BG	22,000	22,000	22,000	0.0		0.0	
NL	19,000	19,000	19,000	0.0		0.0	
CZ	12,200	11,000	11,000	-9.8		0.0	
PT	10,600	10,600	10,000	0.0		-5.7	
IE	5,800	5,800	5,800	0.0		0.0	
IT	6,000	4,000	4,000	-33.3		0.0	
ES	3,200	4,600	4,500	43.8		-2.2	
DK	1,200	1,500	1,500	25.0		0.0	
SK	600	600	600	0.0		0.0	
HR	500	500	500	0.0		0.0	
AT	419	600	650	43.2		8.3	
EL	100	100	100	0.0		0.0	
LT	5	5	5	0.0		0.0	
BE							
SI							
SE							
RO							
FI							
CY							
LV							
EE							
MT							
EU	517,184	510,695	394,525	-1.3		-22.7	

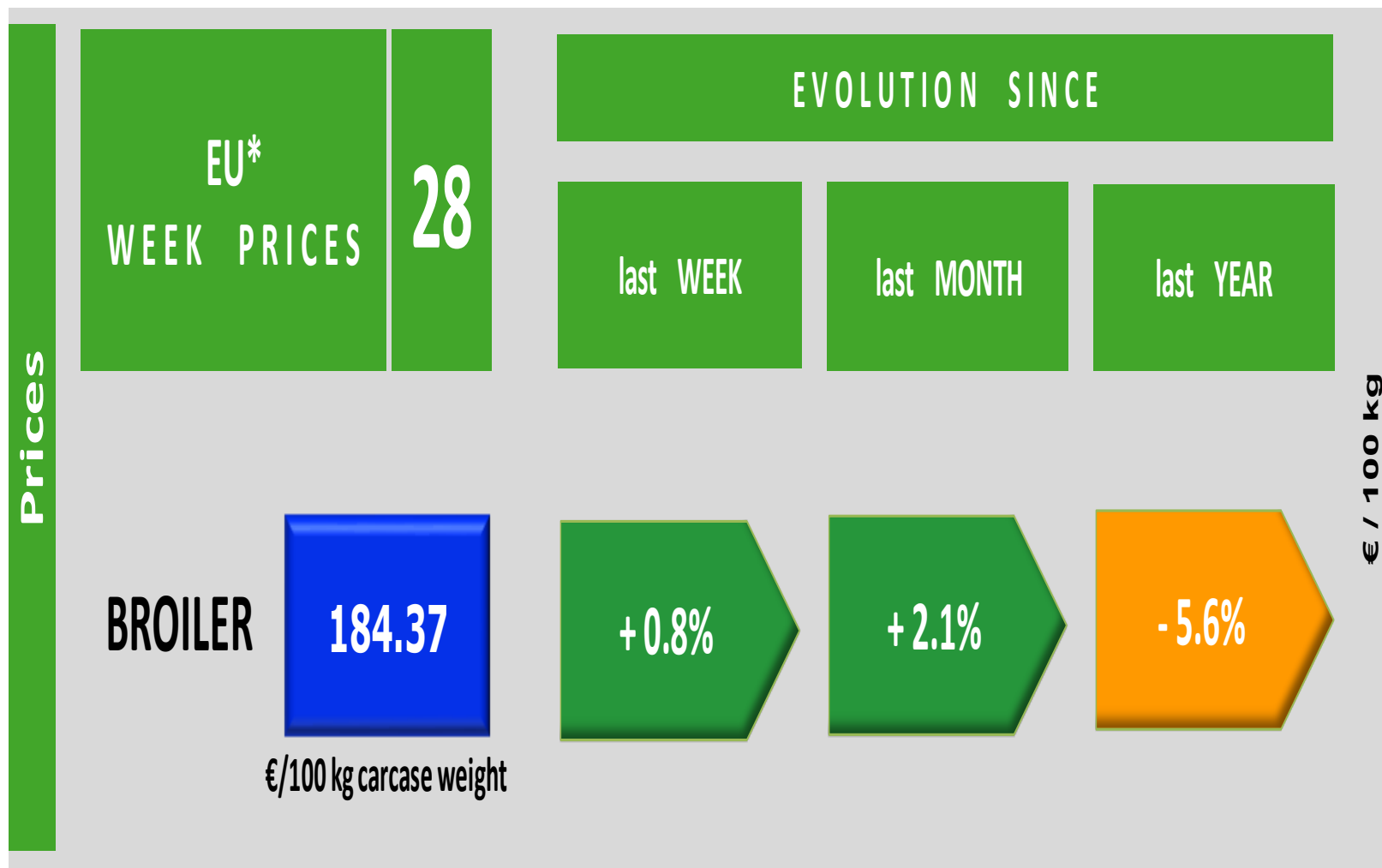
PRODUCTION

Change in Poultry Meat Production in %
2020/2019 (up to April)



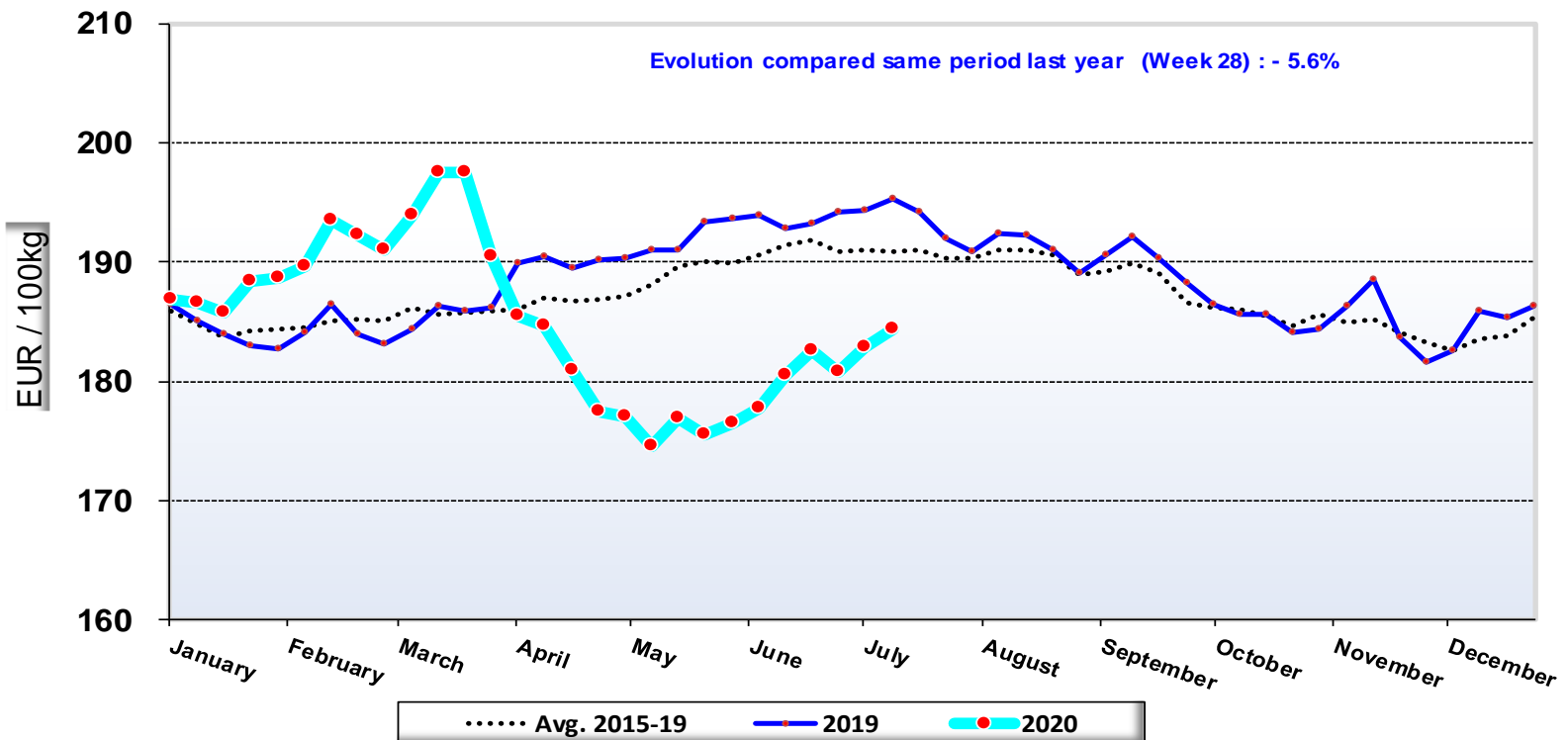
Source: Eurostat

PRICES



Evolution of the weekly EU* average price for **Broiler**

Latest price ==> 184.37 EUR/100 kg



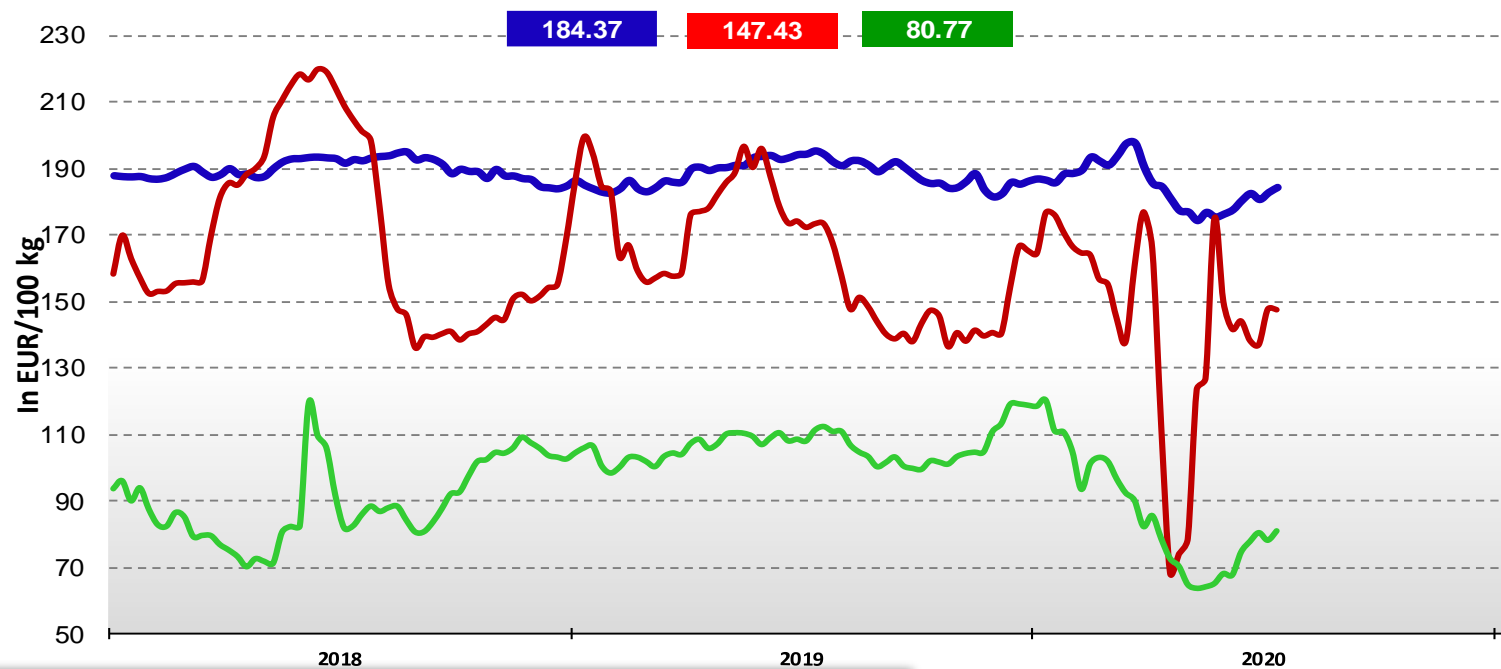
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

* EU without UK

PRICES

EU EVOLUTION BROILER

Broiler prices in EU, USA and Brazil



Sources : EU = weighted average of country prices - Broiler 65%
 US = weekly USDA prices - Fresh chicken grade A, Chicago
 BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

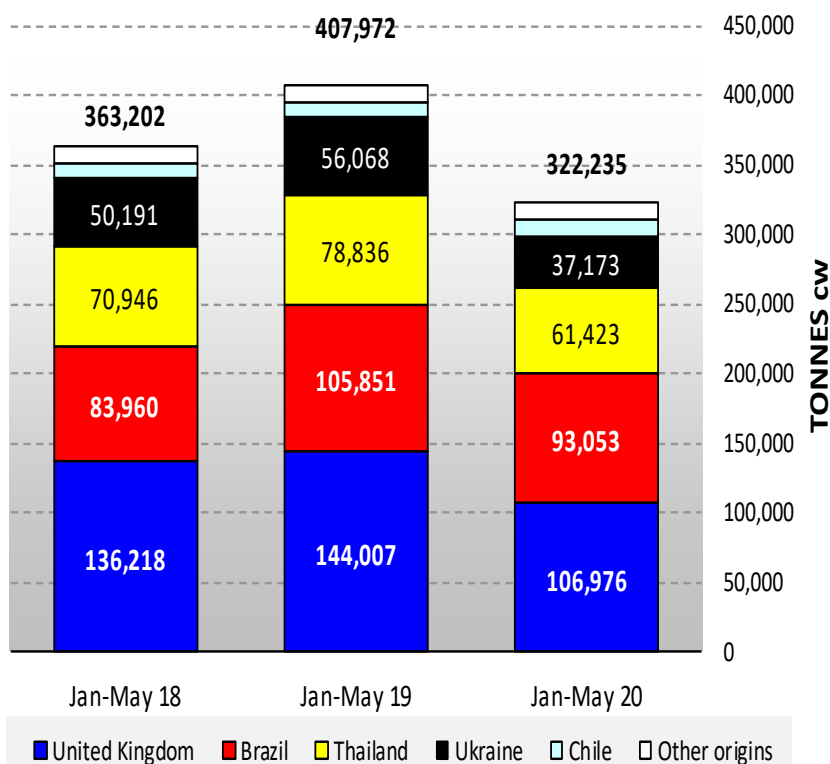
— EU — US — BR

Imports of Poultry meat from selected origins

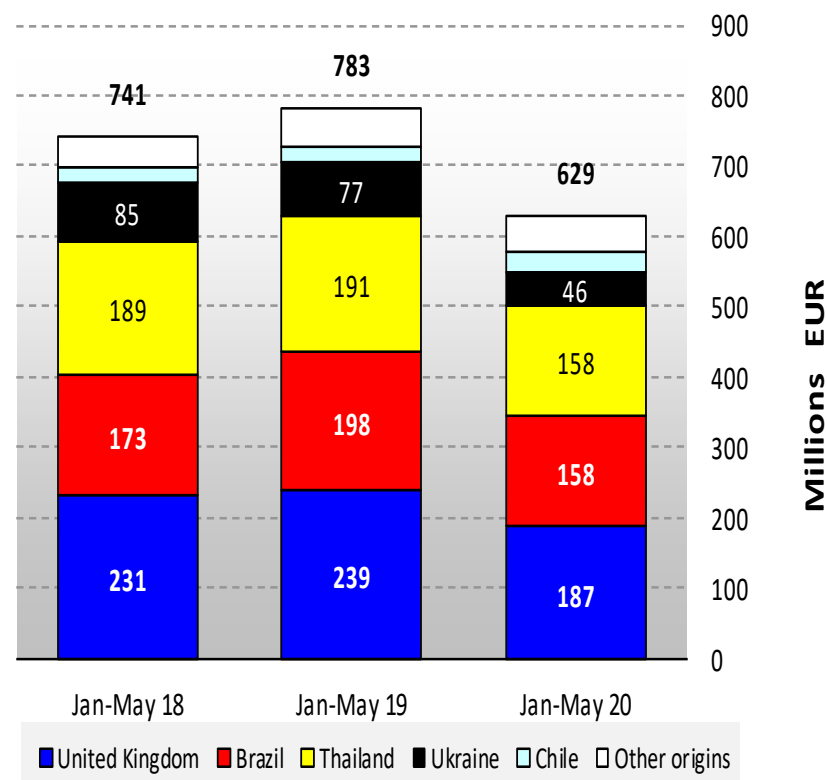
	2016		2017		2018		2019		Jan-May 20		Compared to Jan-May 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom up to Apr 20	322,234	33.0%	338,975	37.1%	325,164	36.0%	340,232	36.4%	106,976	33.2%	#N/A
Brazil	399,968	40.9%	318,421	34.9%	232,212	25.7%	235,530	25.2%	93,053	28.9%	- 12.1%
Thailand	168,015	17.2%	140,474	15.4%	173,177	19.2%	172,747	18.5%	61,423	19.1%	- 22.1%
Ukraine	48,026	4.9%	80,128	8.8%	123,411	13.7%	133,819	14.3%	37,173	11.5%	- 33.7%
Chile	16,979	1.7%	9,165	1.0%	21,156	2.3%	19,610	2.1%	12,095	3.8%	+ 20.0%
China	12,994	1.3%	14,674	1.6%	17,060	1.9%	21,878	2.3%	7,149	2.2%	- 21.8%
Argentina	2,856	0.3%	3,118	0.3%	3,990	0.4%	4,071	0.4%	1,600	0.5%	+ 7.7%
Switzerland	2,548	0.3%	2,736	0.3%	2,901	0.3%	2,554	0.3%	1,026	0.3%	- 14.1%
Other Destinations	3,786	0.4%	5,612	0.6%	4,810	0.5%	4,171	0.4%	1,740	0.5%	
Total to Third Countries	977,406		913,304		903,882		934,610		322,235		
% change			- 7%		- 1%		+ 3%		- 21.0%		
Total (without UK)	655,172		574,329		578,717		594,378		215,258		
% change			- 12%		+ 1%		+ 3%		- 18.5%		

EU poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

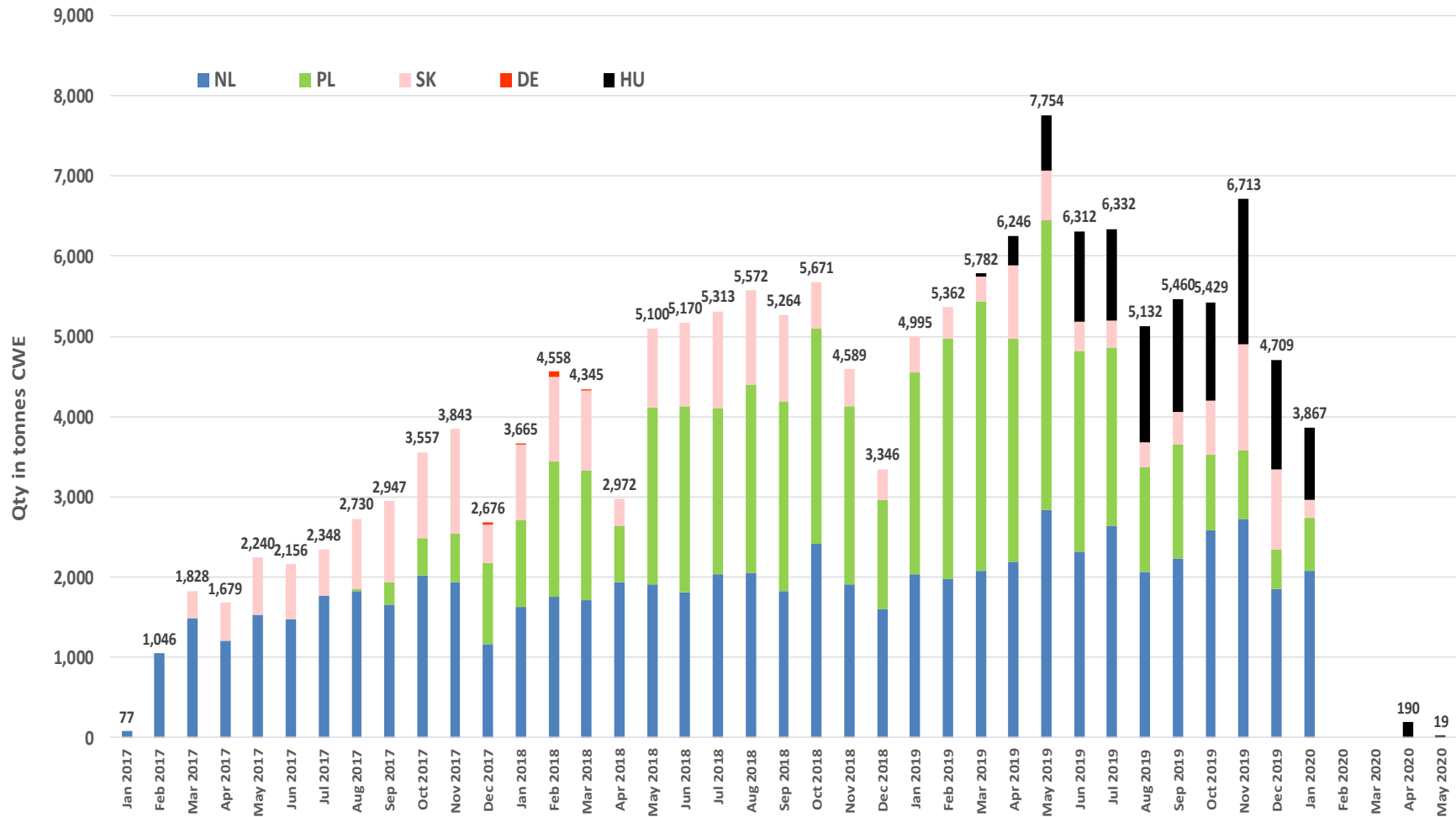


EU IMPORTS of Poultry Meat (Millions EUR)



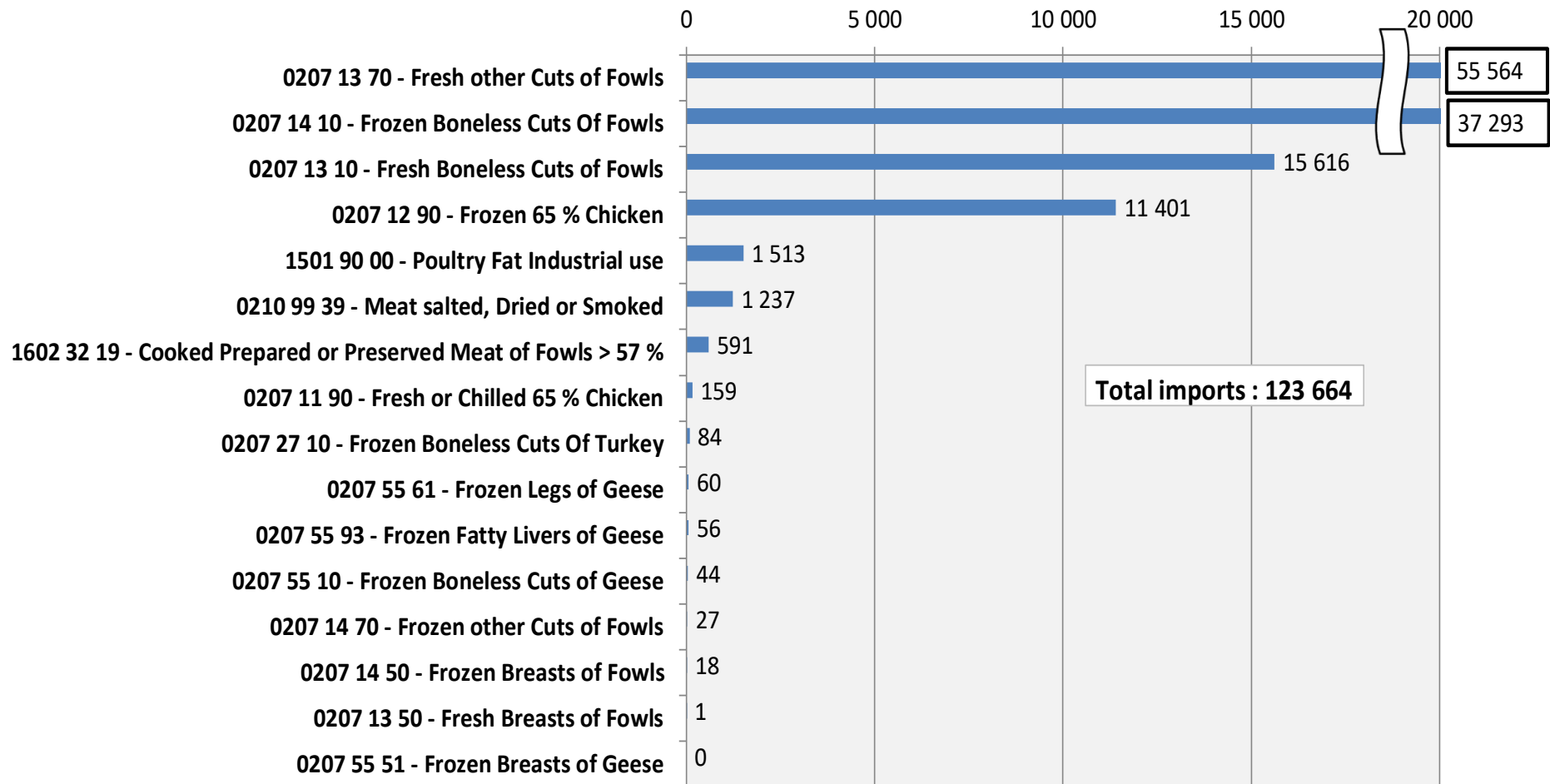
EU market situation for Poultry
22 July 2020

Monthly imports from Ukraine under CN 2071370

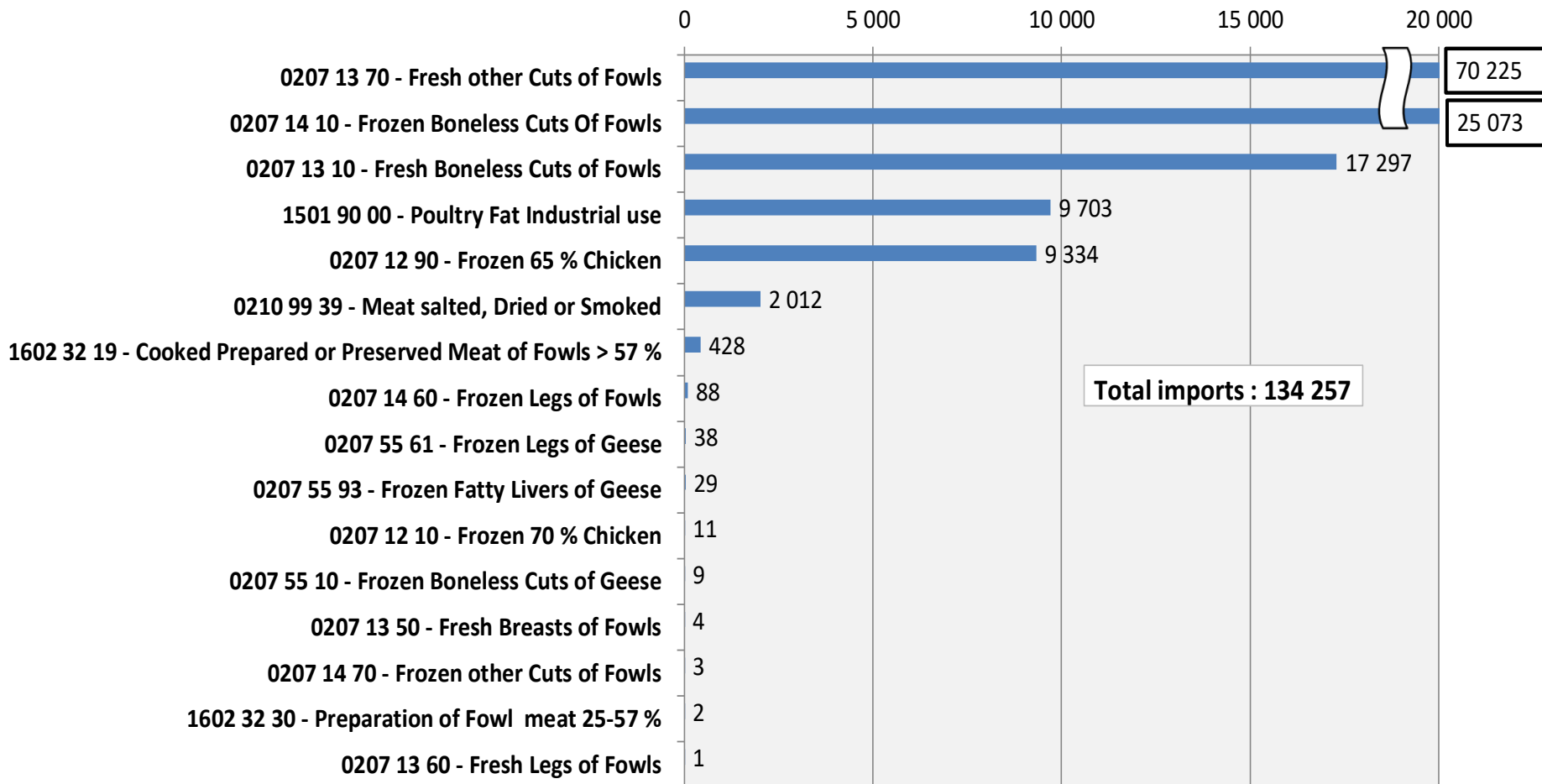


Source: Comext

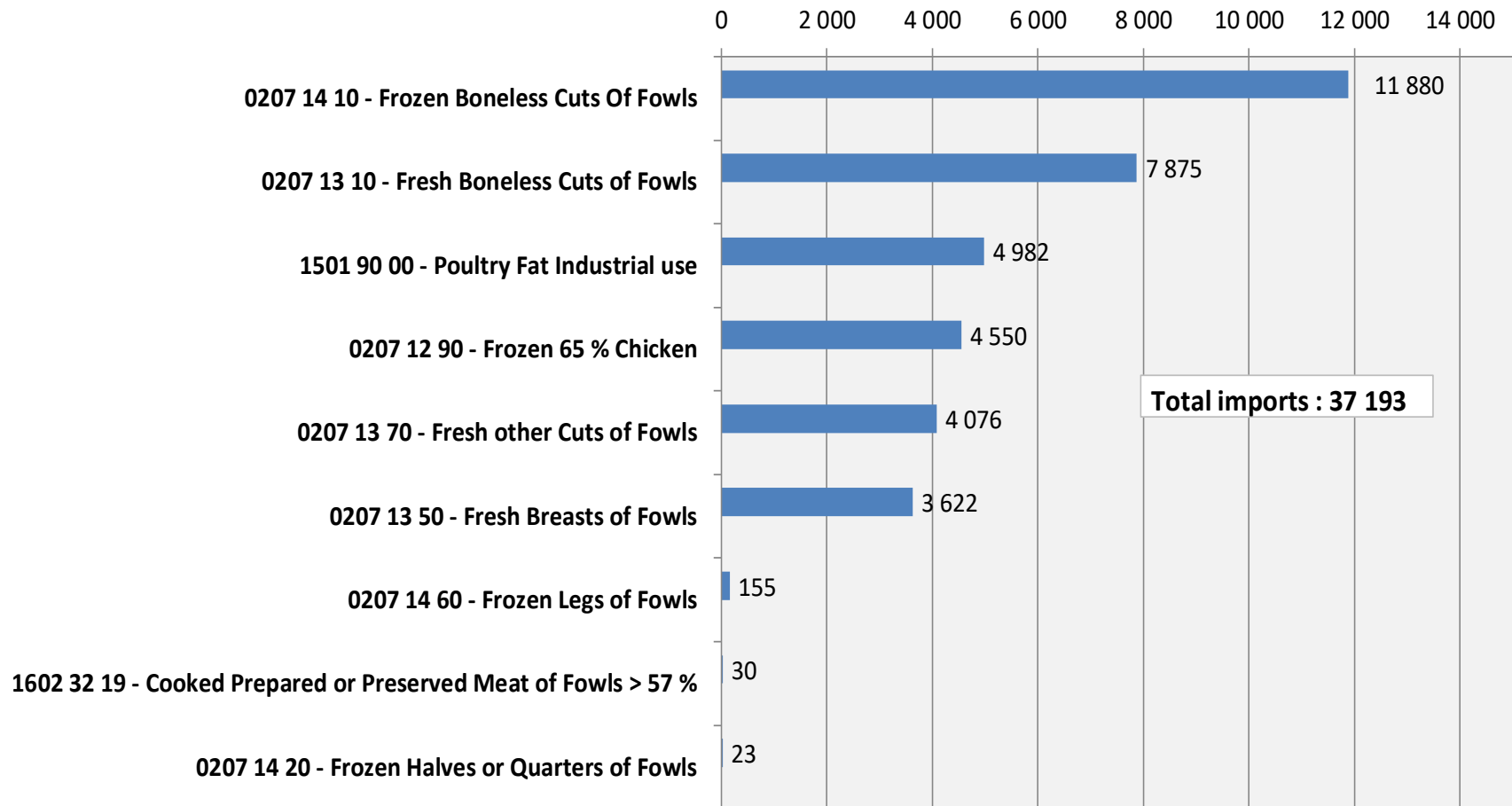
EU+UK Imports of poultry meat from Ukraine in 2018 (in tonnes CWE)



EU+UK Imports of poultry meat from Ukraine in 2019 (in tonnes CWE)



EU+UK Imports of poultry meat from Ukraine in Jan-May20 (in tonnes CWE)

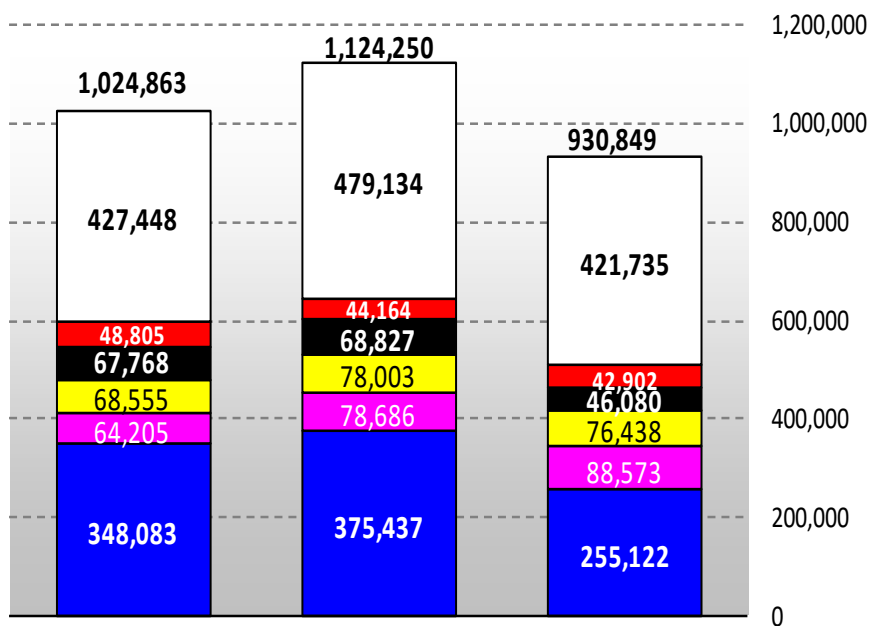


Exports of Poultry Meat to Selected Destinations

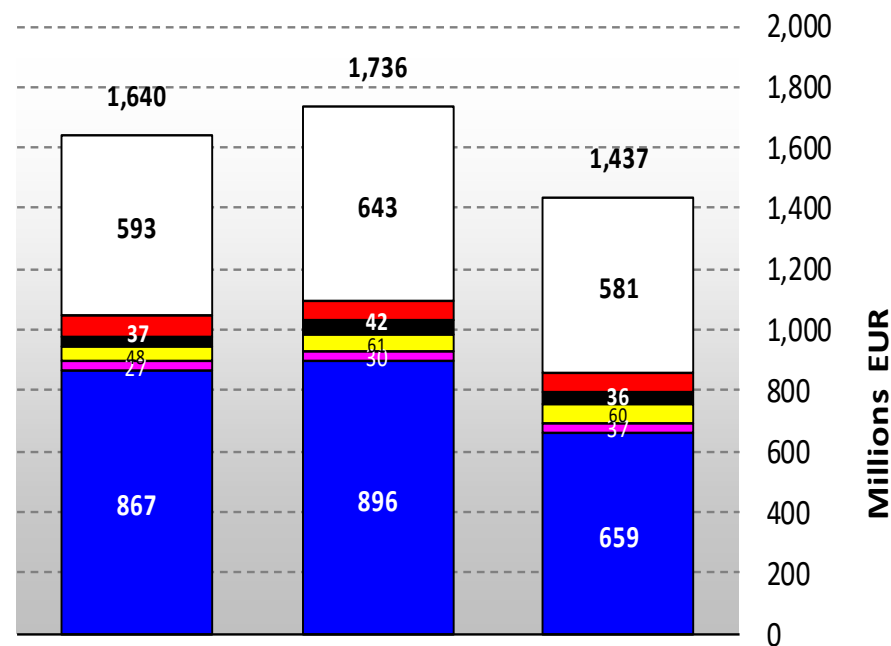
	2016		2017		2018		2019		Jan-May 20		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-May 19
United Kingdom up to Apr 20	801,035	33.7%	825,974	34.3%	865,061	34.0%	886,617	33.2%	255,122	27.4%	#N/A
Philippines	120,840	5.1%	125,345	5.2%	159,845	6.3%	215,614	8.1%	88,573	9.5%	+ 12.6%
Ghana	113,425	4.8%	143,900	6.0%	163,302	6.4%	184,867	6.9%	76,438	8.2%	- 2.0%
Ukraine	114,012	4.8%	160,818	6.7%	177,036	7.0%	178,214	6.7%	46,080	5.0%	- 33.0%
Hong Kong	105,607	4.4%	121,063	5.0%	111,926	4.4%	93,861	3.5%	42,902	4.6%	- 2.9%
Congo (Dem. Rep.)	45,943	1.9%	58,336	2.4%	74,952	2.9%	78,807	2.9%	41,344	4.4%	+ 64.0%
South Africa	236,831	10.0%	76,314	3.2%	84,004	3.3%	130,054	4.9%	35,513	3.8%	- 41.2%
Saudi Arabia	121,463	5.1%	98,715	4.1%	82,481	3.2%	67,159	2.5%	25,880	2.8%	- 12.6%
Benin	118,575	5.0%	103,562	4.3%	90,595	3.6%	68,936	2.6%	23,605	2.5%	- 42.6%
Vietnam	31,623	1.3%	49,441	2.1%	79,965	3.1%	83,509	3.1%	20,049	2.2%	- 54.3%
Cuba	7,409	0.3%	3,379	0.1%	8,662	0.3%	36,934	1.4%	15,933	1.7%	+ 26.5%
Other Destinations	558,334	23.5%	644,548	26.7%	644,772	25.4%	649,819	24.3%	259,411	27.9%	
Total to Third Countries	2,375,097		2,411,394		2,542,600		2,674,391		930,849		
% change			+ 2%		+ 5%		+ 5%		- 17.2%		
Total (without UK)	1,574,062		1,585,420		1,677,539		1,787,774		675,727		
% change			+ 1%		+ 6%		+ 7%		- 9.8%		

EU poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)

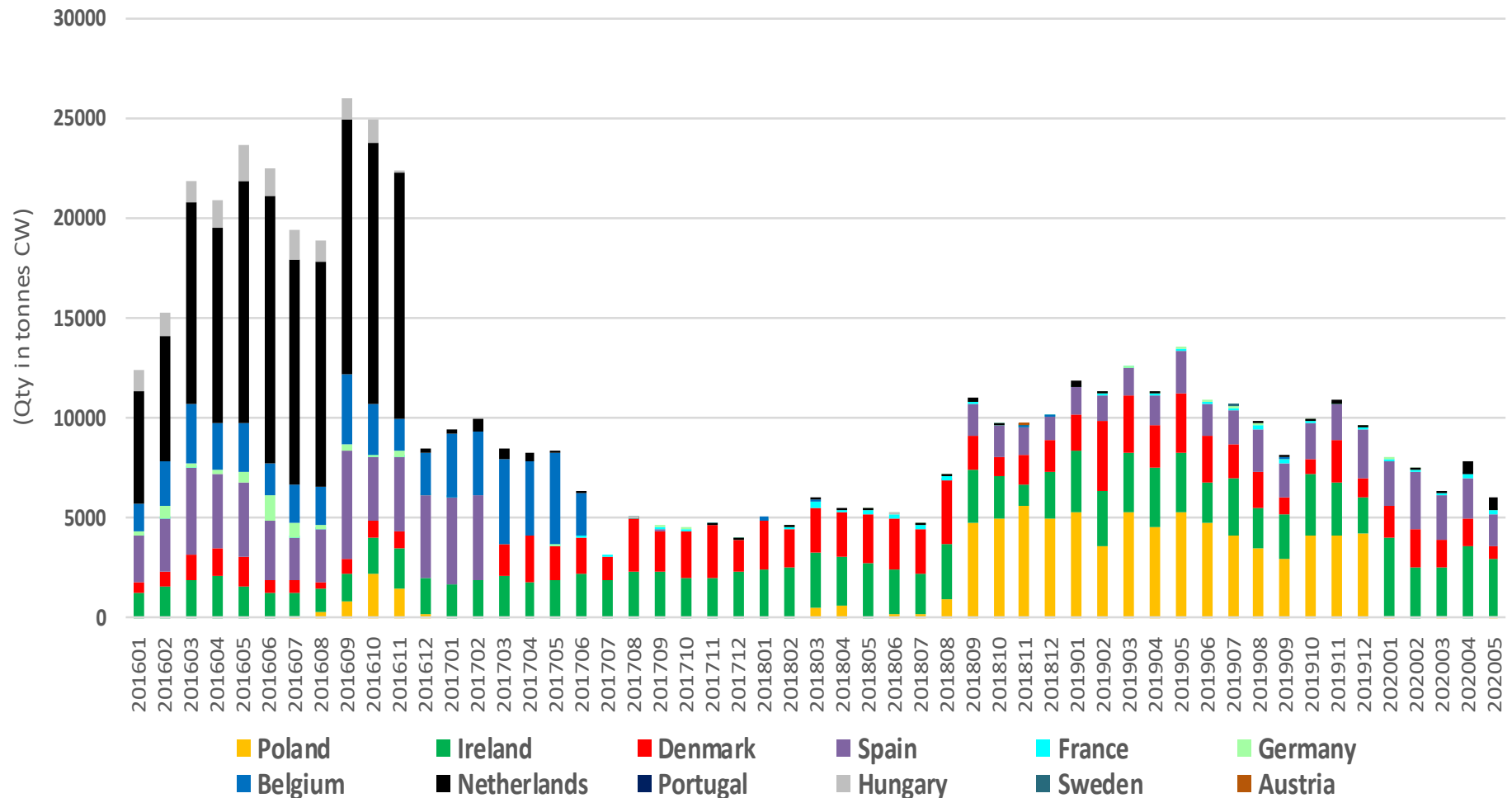


EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 37 ('Millions EUR)

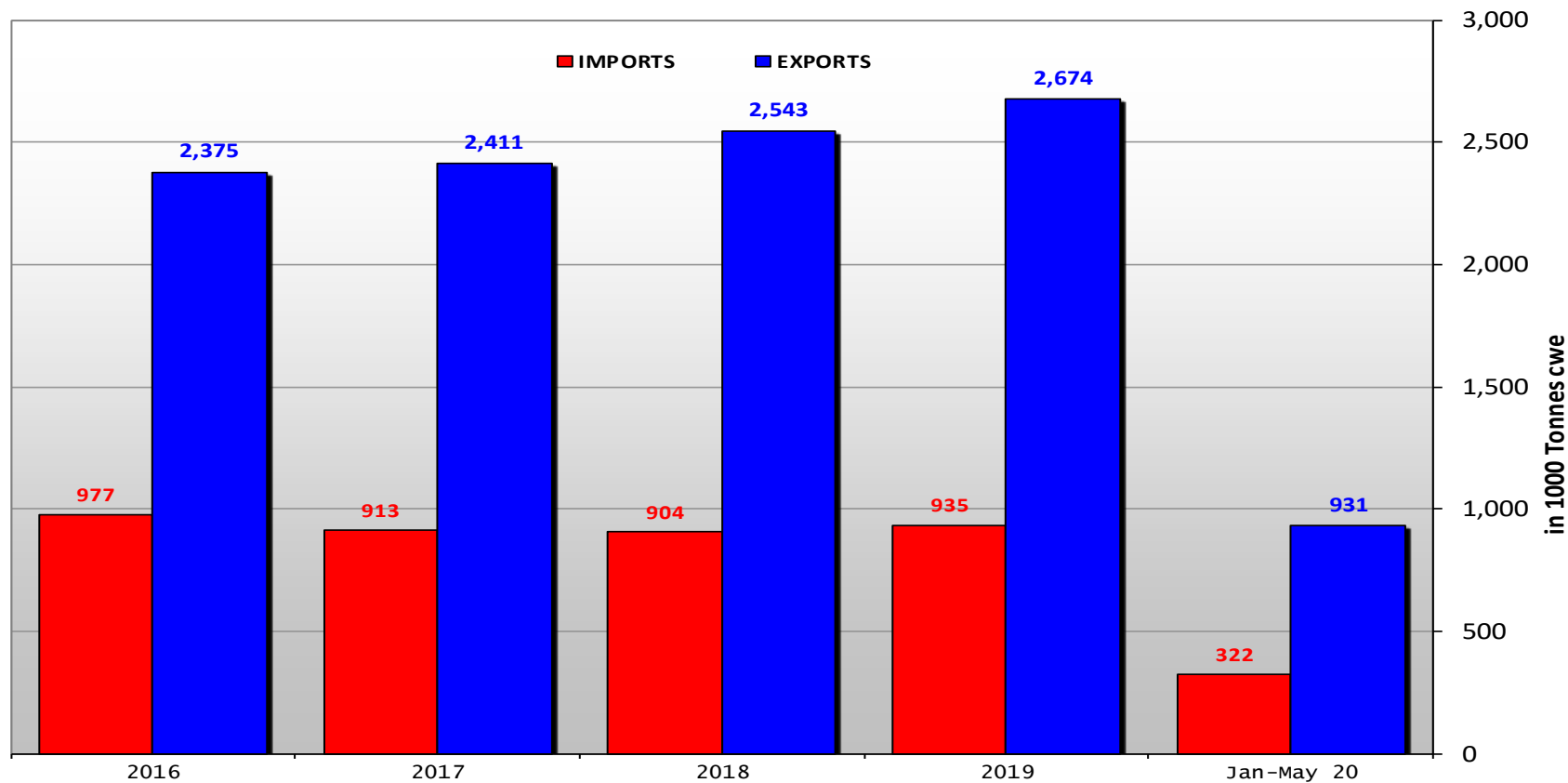
EU27 EXPORTS OF POULTRY MEAT & POULTRY MEAT PRODUCTS TO SOUTH AFRICA



TRADE

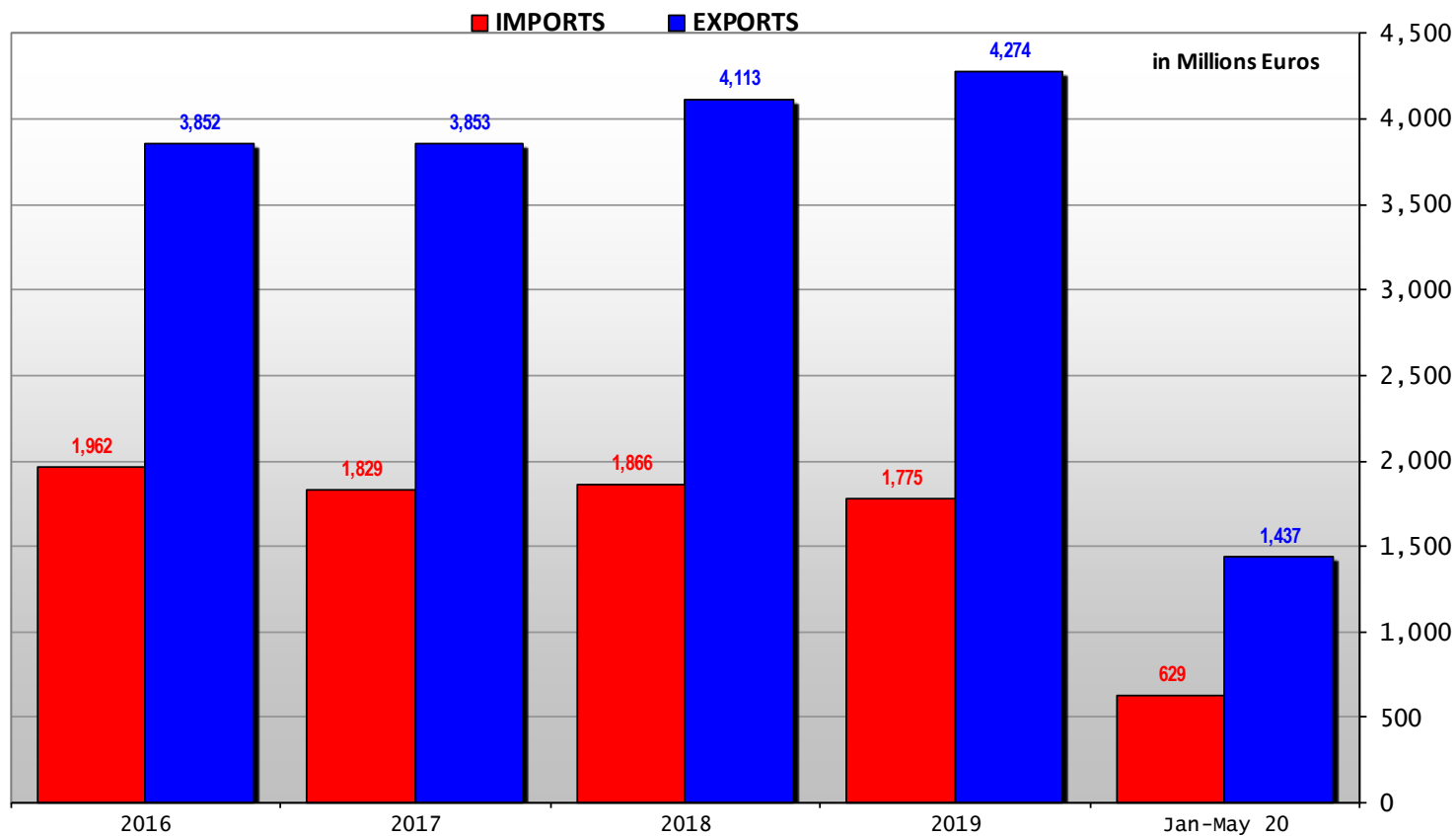
BALANCE

EU Poultry meat Trade Balance



EU market situation for
Poultry
22 July 2020

EU Poultry meat trade balance (in 1000 euros)



Where to find information

- **Poultry overview:**
- https://ec.europa.eu/info/food-farming-fisheries/animals-and-animal-products/animal-products/poultry-meat_en
- **Poultry market monitoring:**
- https://ec.europa.eu/info/food-farming-fisheries/animals-and-animal-products/animal-products/poultry-meat_en#marketmonitoring
- **Poultry dashboard:**
- https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/poultry-meat-dashboard_en.pdf