

EU Market Situation for Poultry

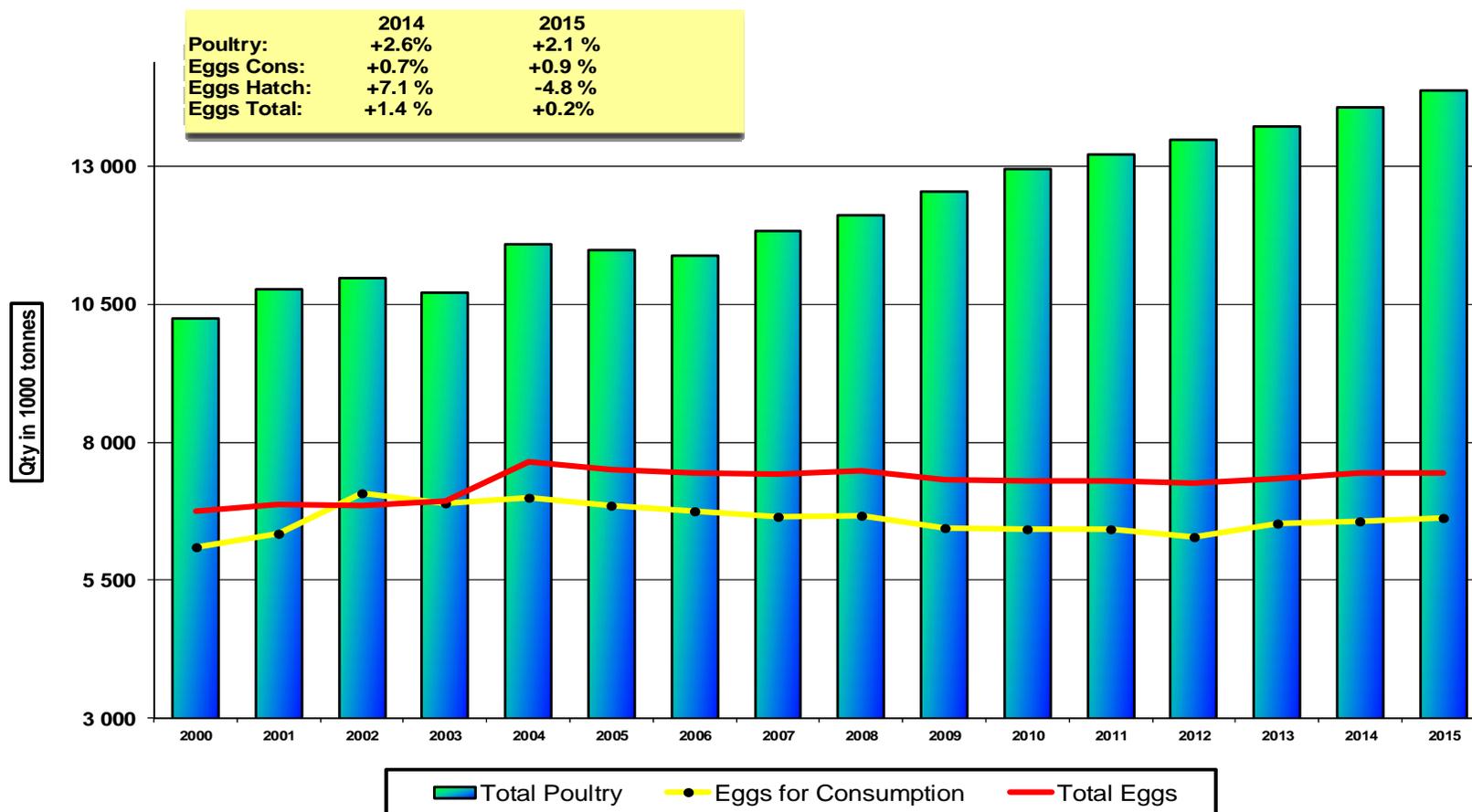
Civil Dialogue

10 March 2015





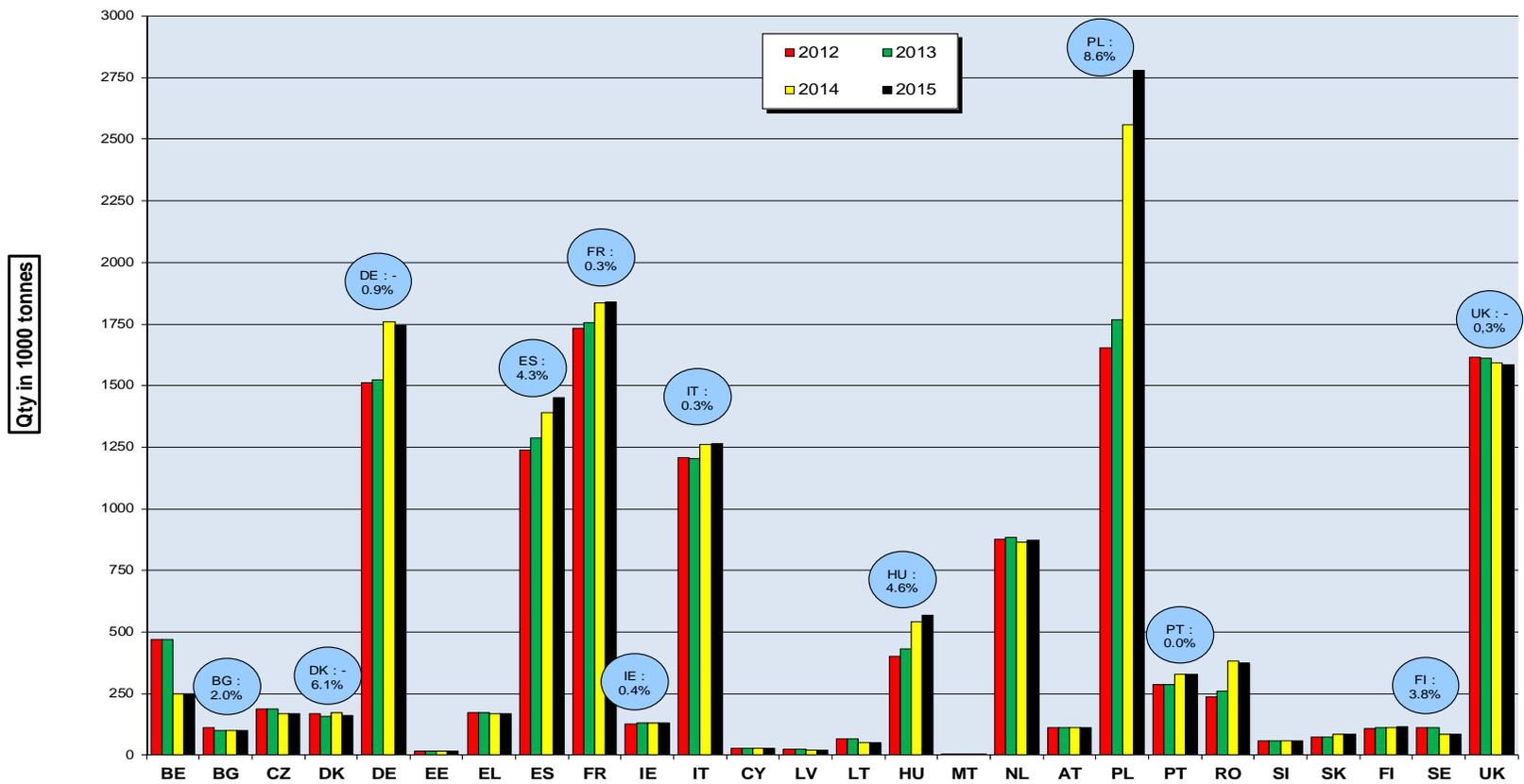
Experts EU production forecast 2014/2015





Experts EU production forecast of Poultry Meat

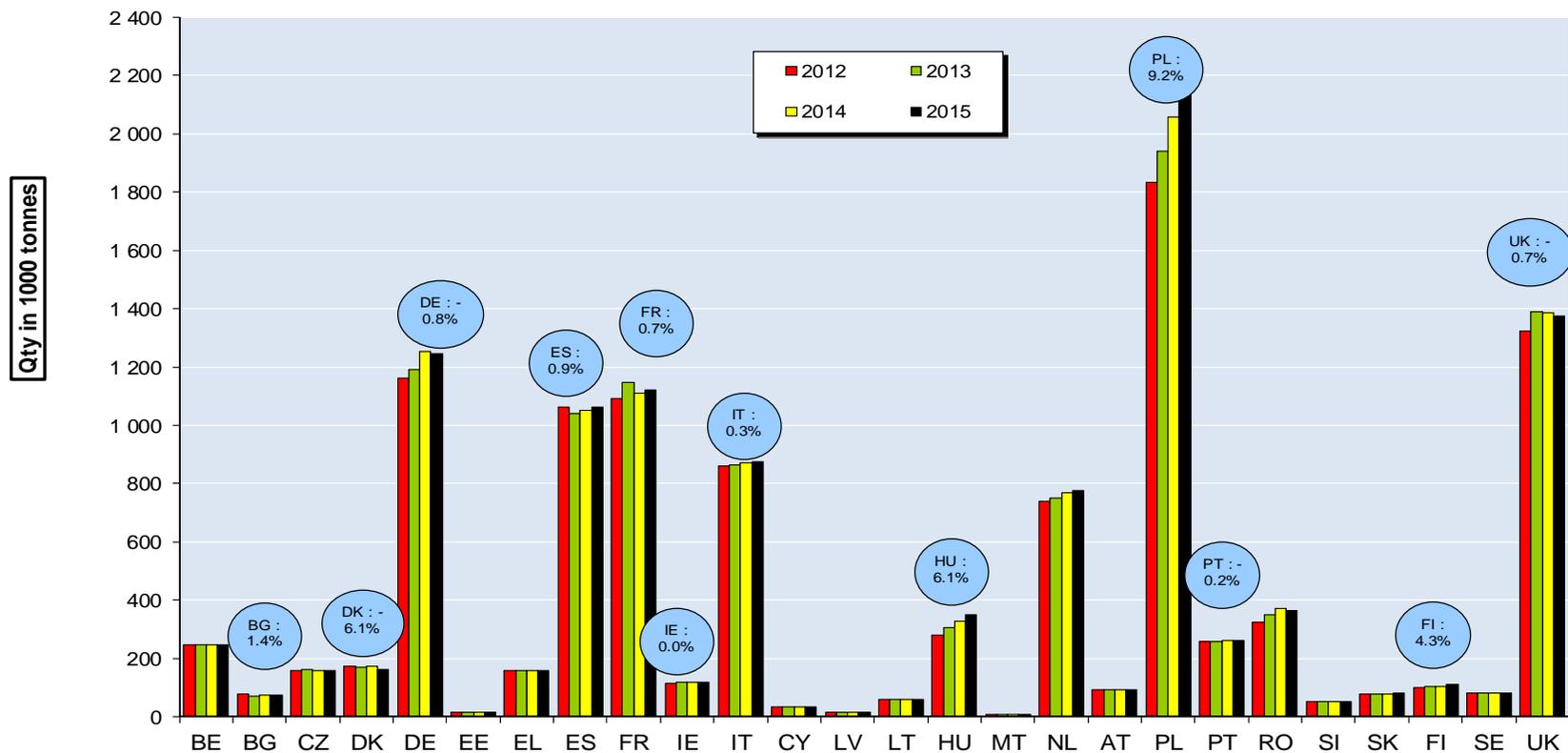
2014: 14 077.2 Th T (+ 2.6 %) & 2015: 14 366.6 ThT (+ 2.1 %)





Experts EU production forecast of Broiler Meat

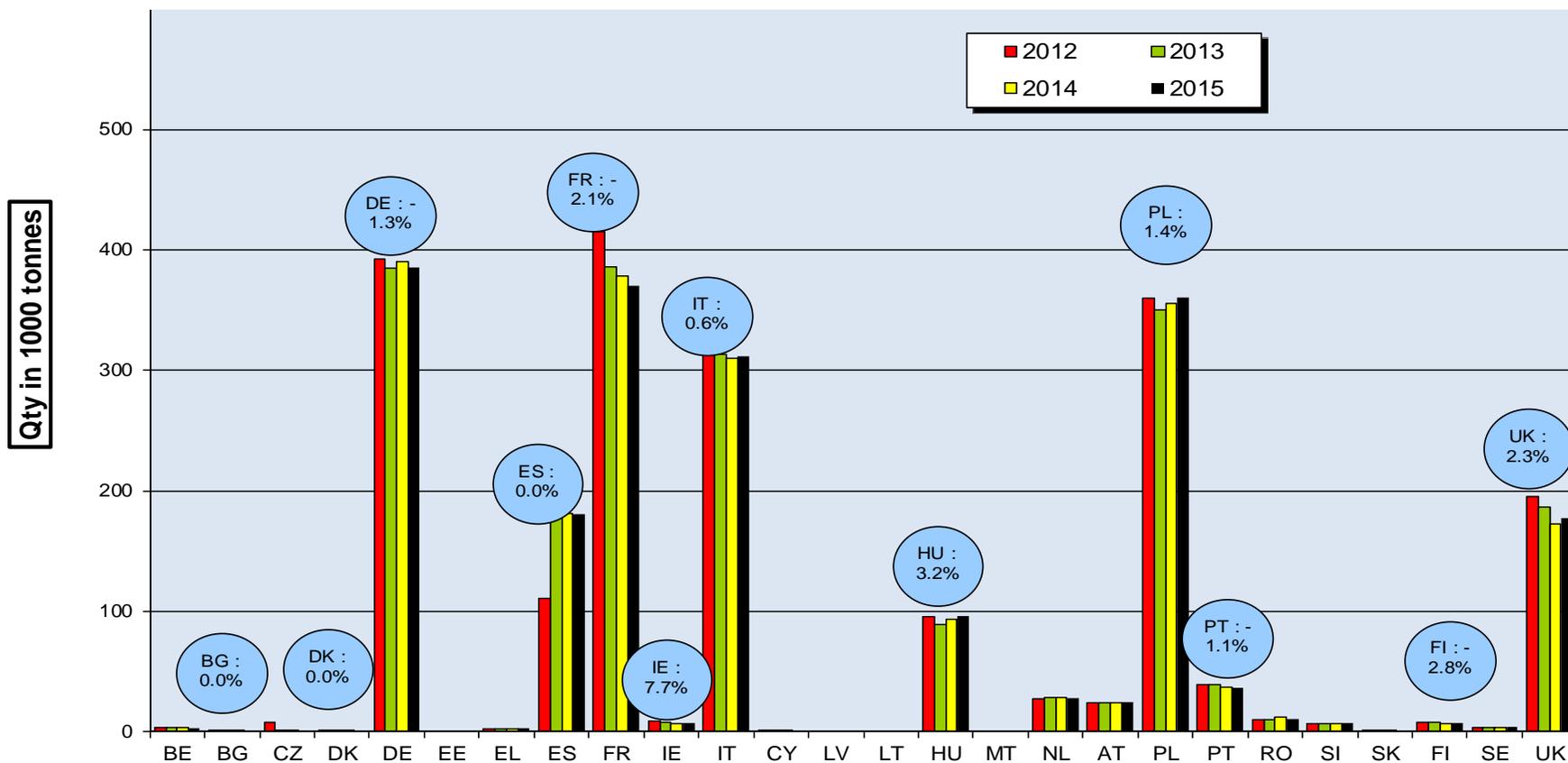
2014: 10 936.0 Th T (+ 2.3%) & 2015: 11 142.7 ThT (+ 1.9%)





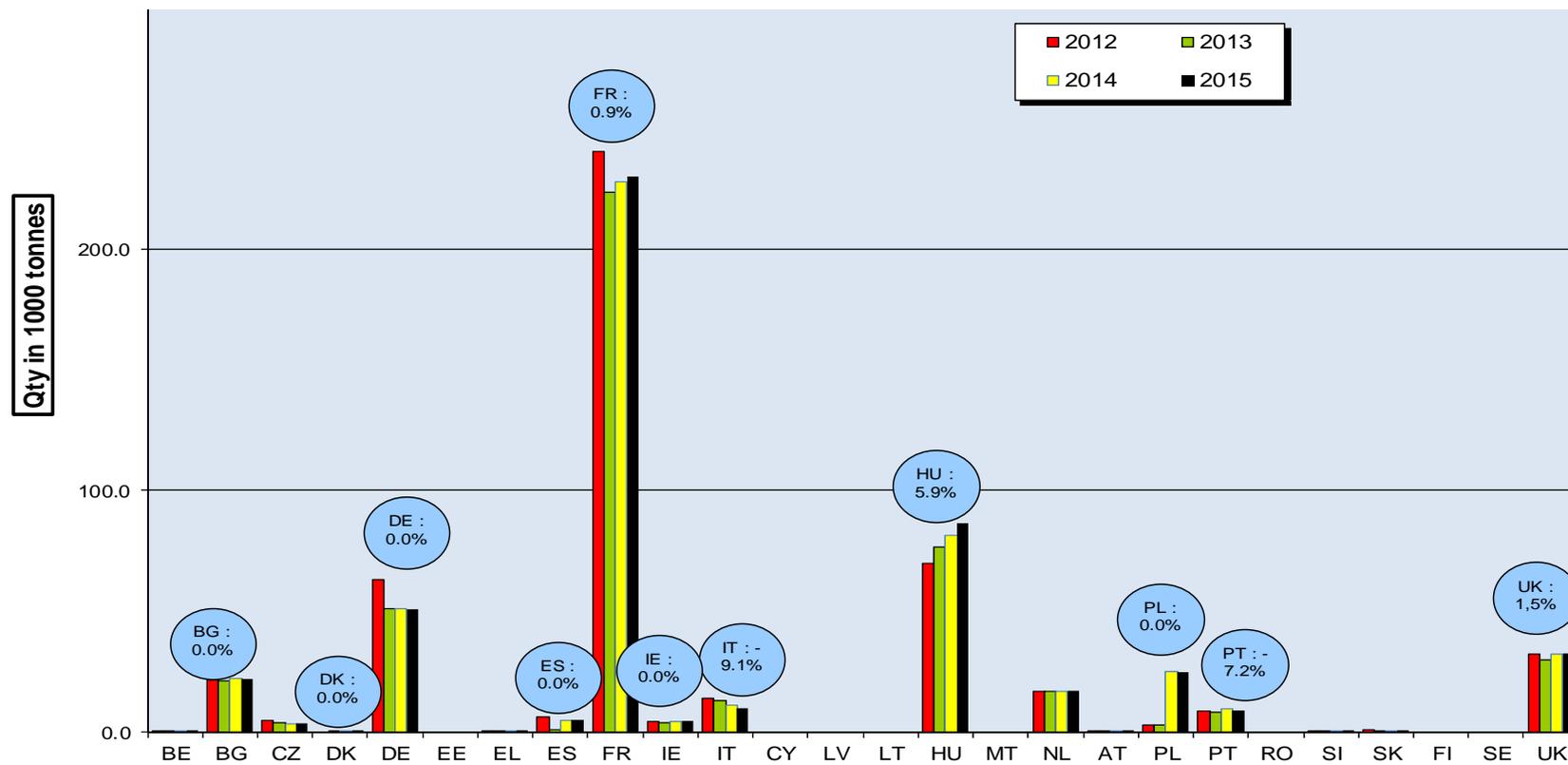
Experts EU production forecast of Turkey Meat

2014: 2 016.5 Th T (- 0.5 %) & 2015: 2 015.4 ThT (- 0.1 %)



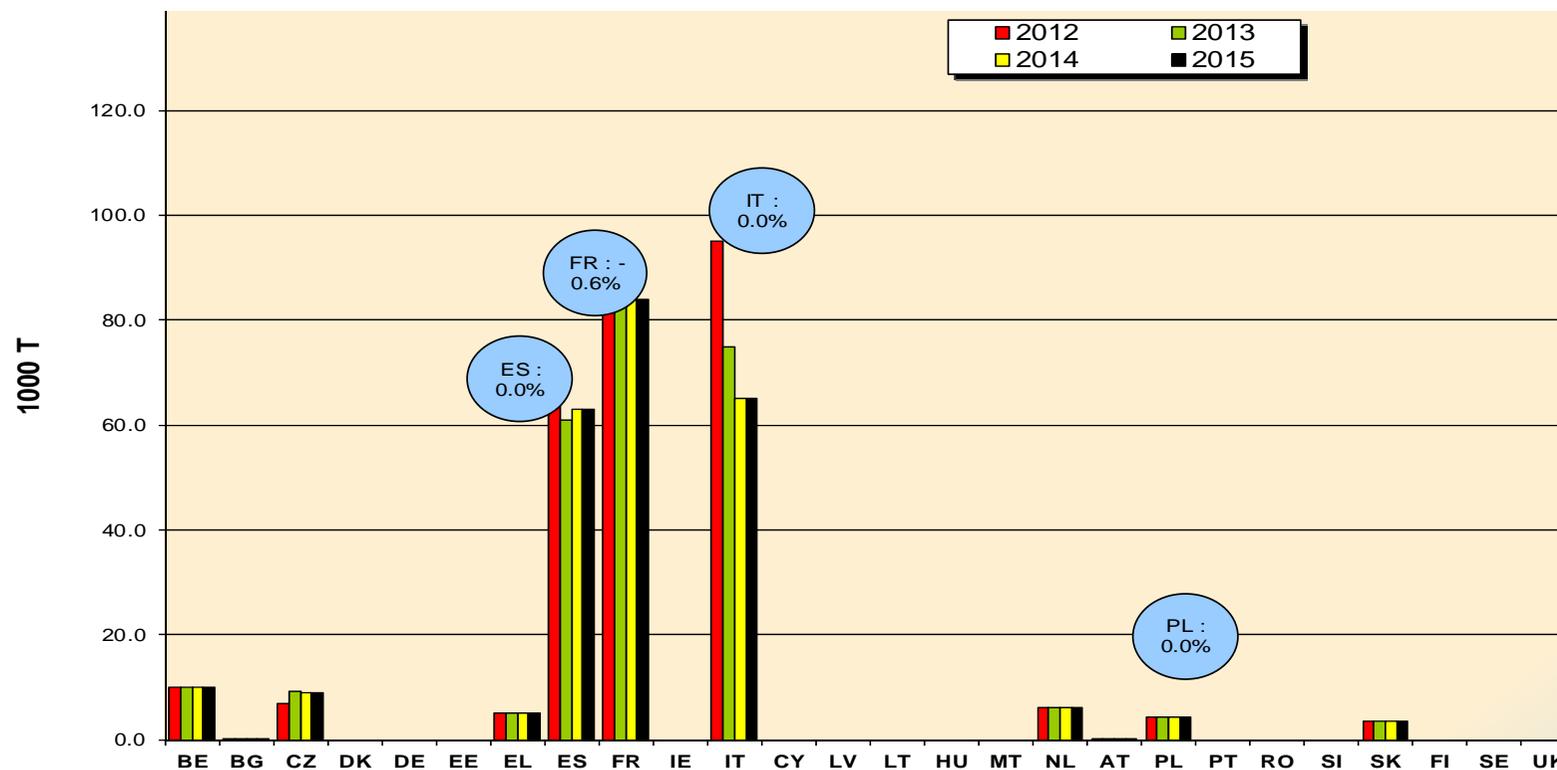
Experts EU production forecast of Duck Meat

2014: 491.2 Th T (+ 8.6 %) & 2015: 496.8 ThT (+ 1.1 %)



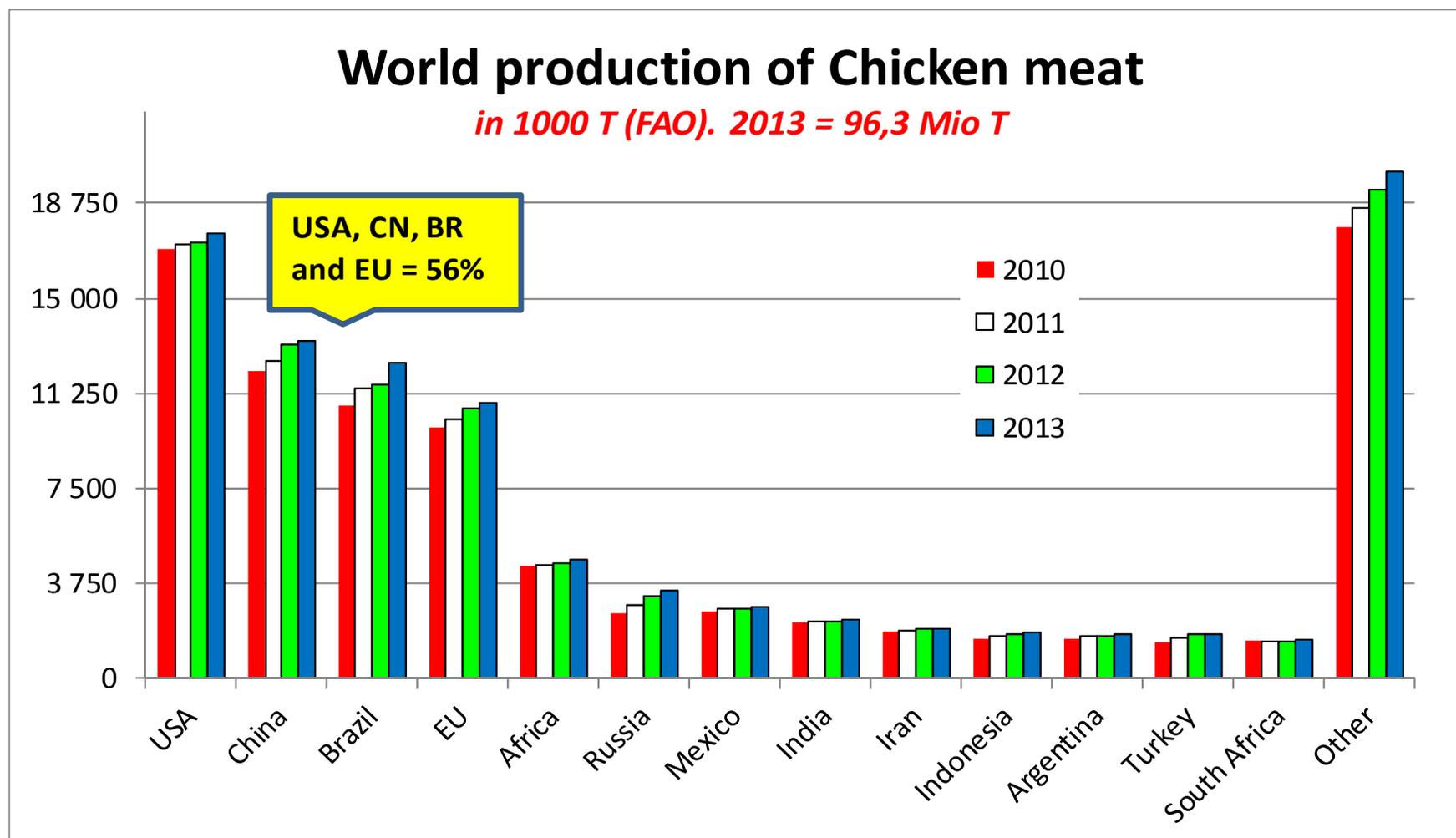
Experts EU production forecast of Rabbit Meat

2014: 250.5 Th T (- 3.5 %) & 2015: 250.0 ThT (- 0.2 %)



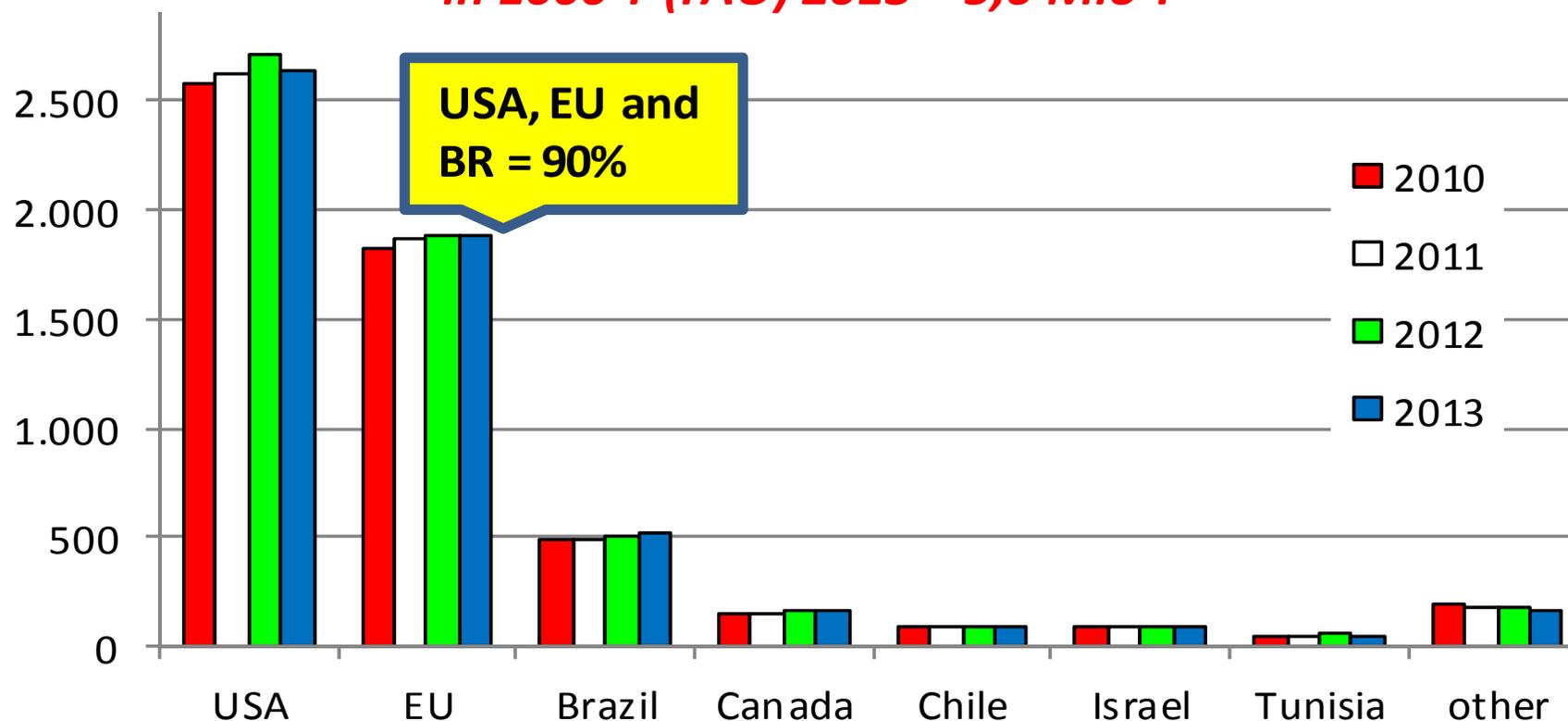
World production of Chicken meat

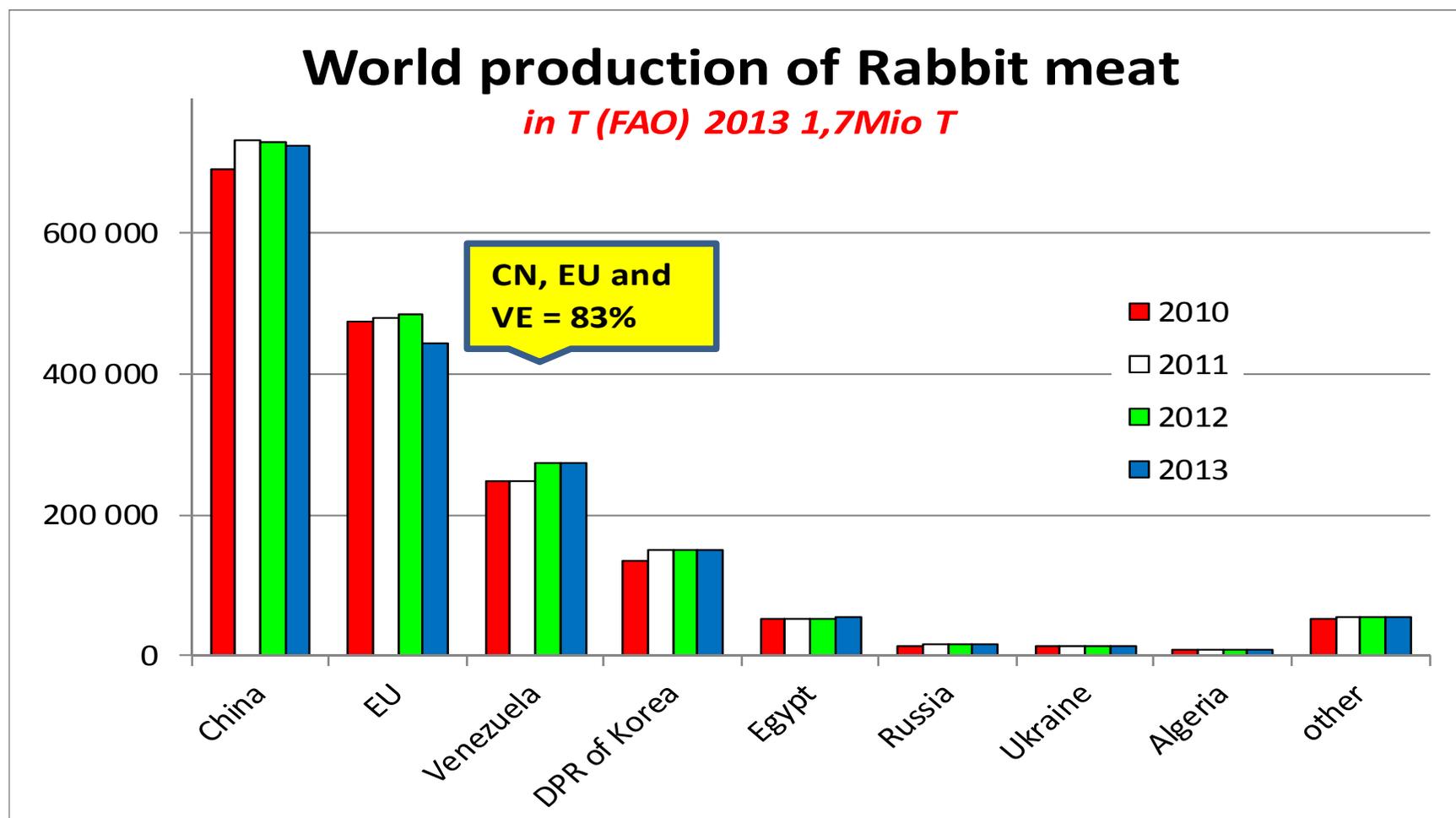
in 1000 T (FAO). 2013 = 96,3 Mio T



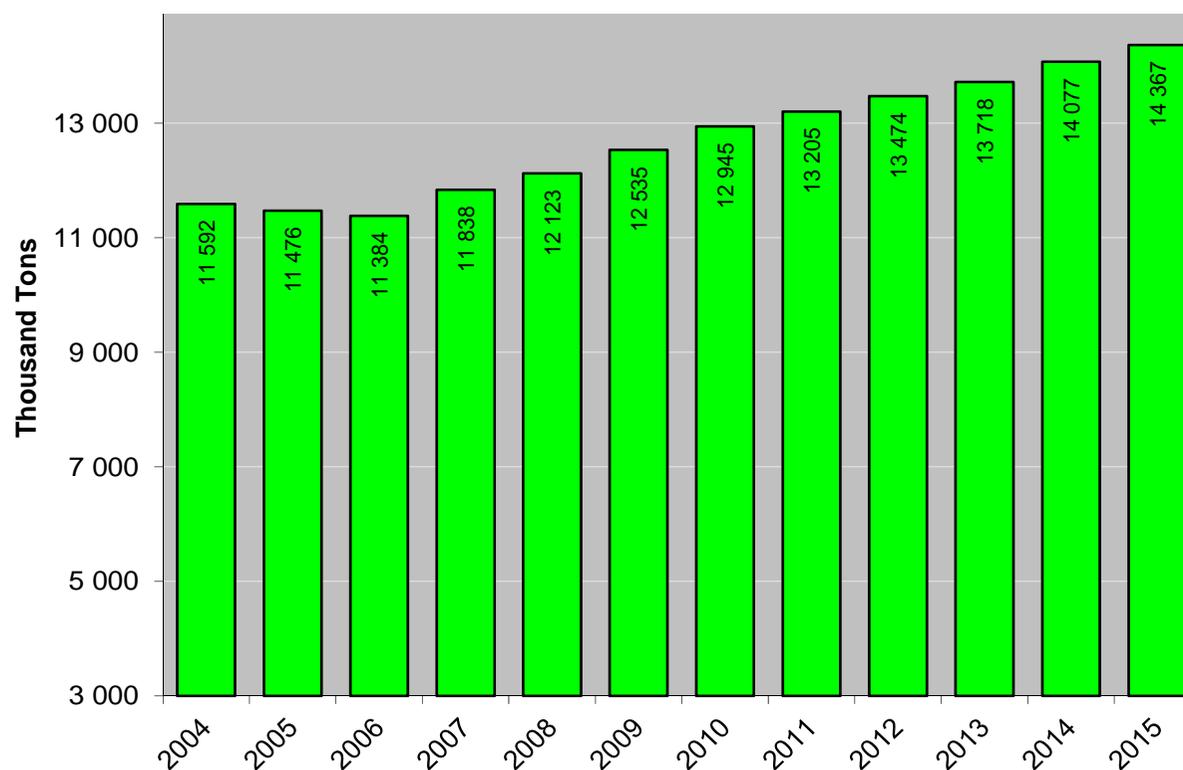
World Turkey production

in 1000 T (FAO) 2013 = 5,6 Mio T





Experts EU Poultry production forecast



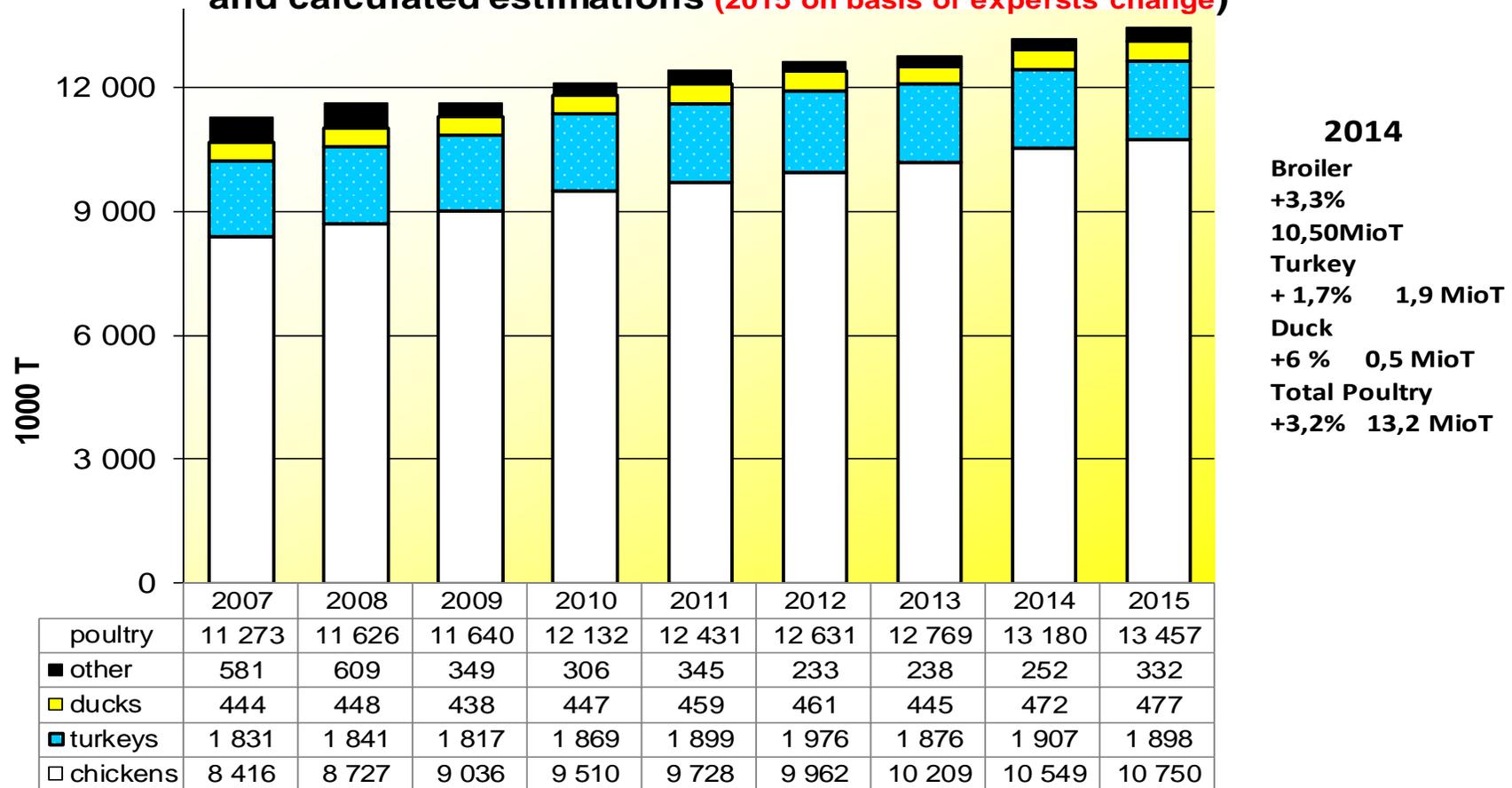
2014

Broiler
+2,3% 10,936 MioT
Turkey
-0,5% 2,017 MioT
Duck
+8,6% 0,491 MioT
Total Poultry
+2,6% 14,077 MioT

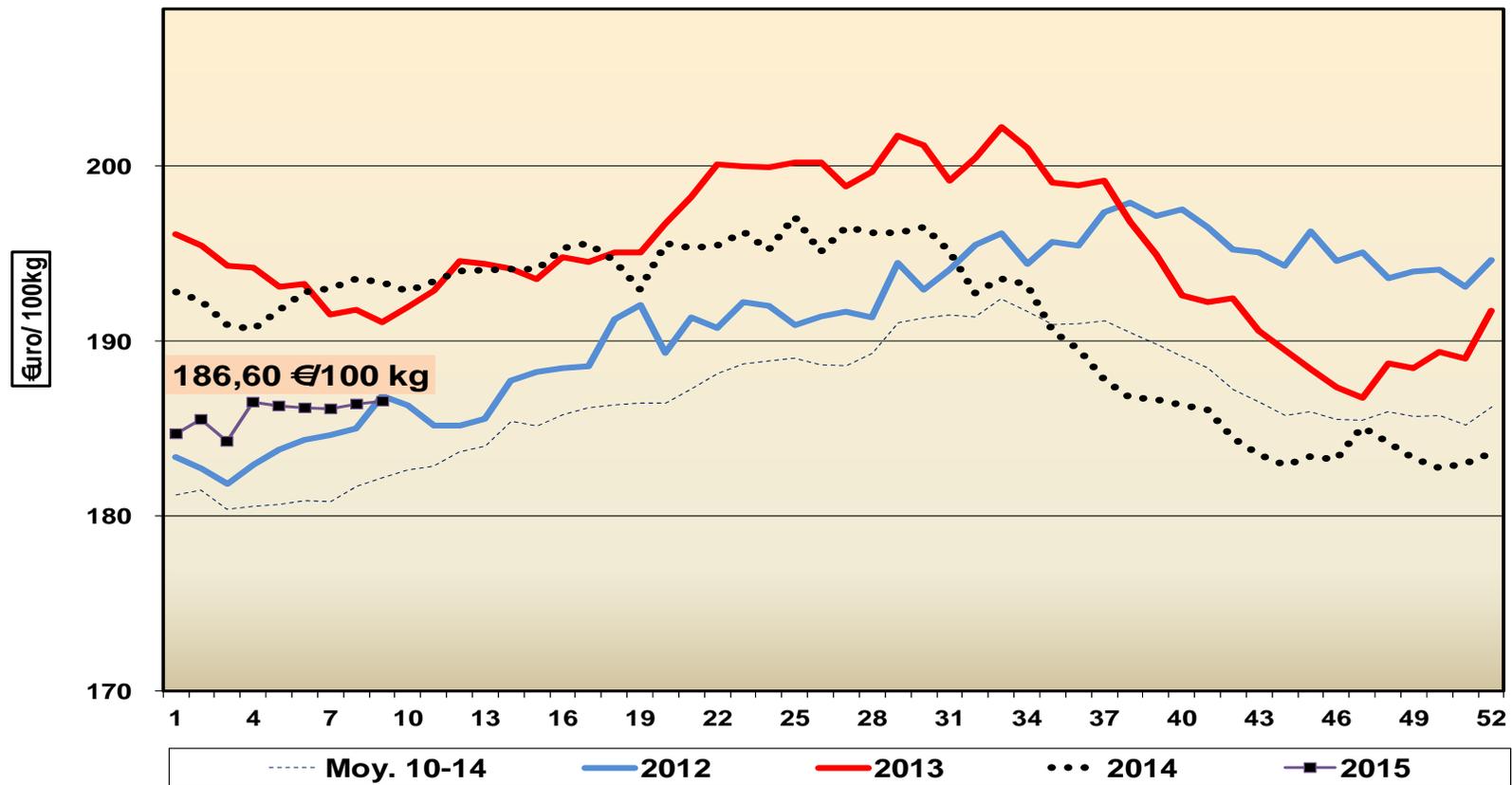
2015

Broiler
+1,9% 11,143 MioT
Turkey
-0.1% 2,015 MioT
Duck
+1,1% 0,497 MioT
Total Poultry
+2,1% 14,367 MioT

EU Poultry production on basis of available slaughter data and calculated estimations (2015 on basis of experts' change)

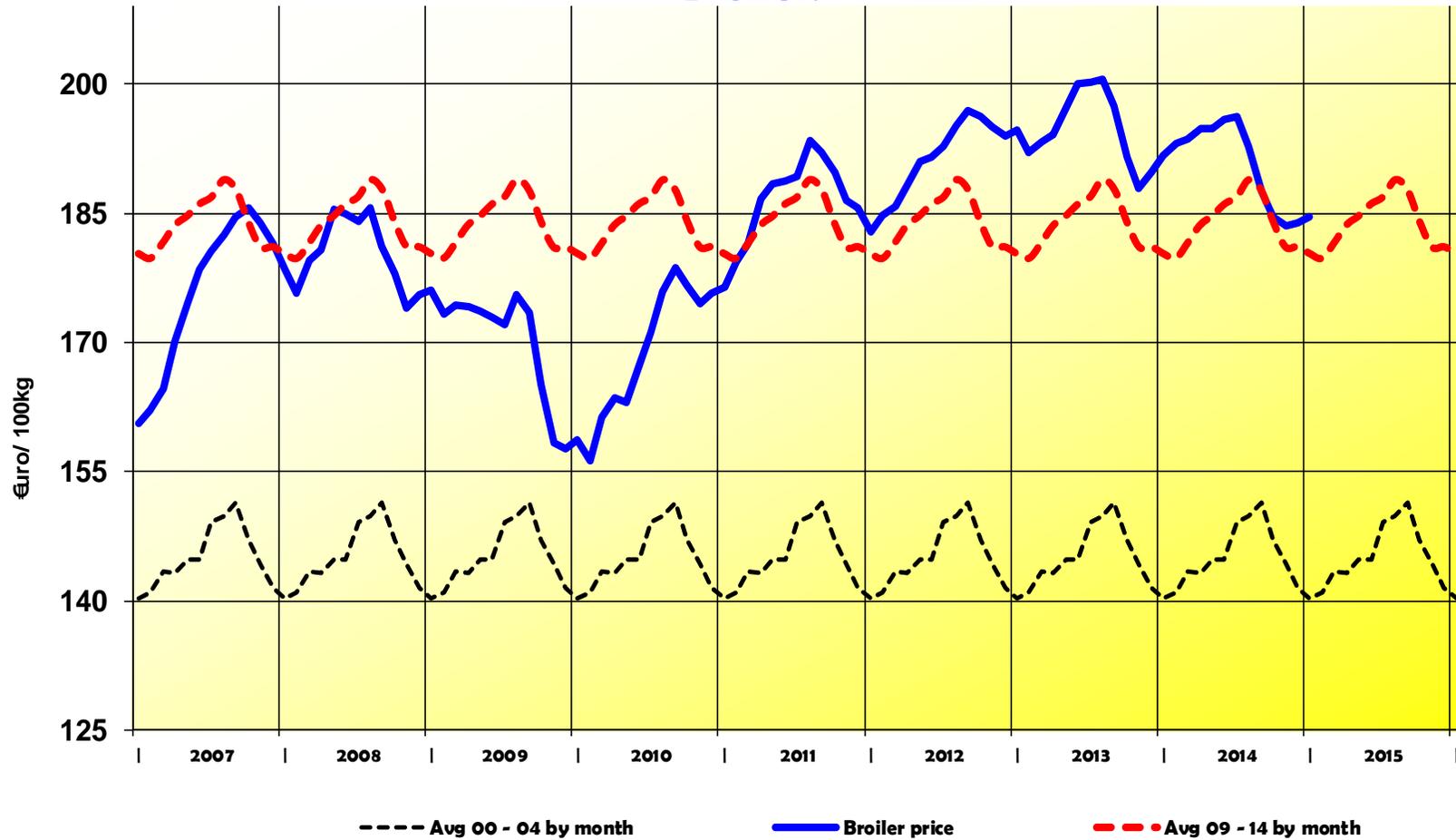


Evolution of the weekly EU average price for Broiler



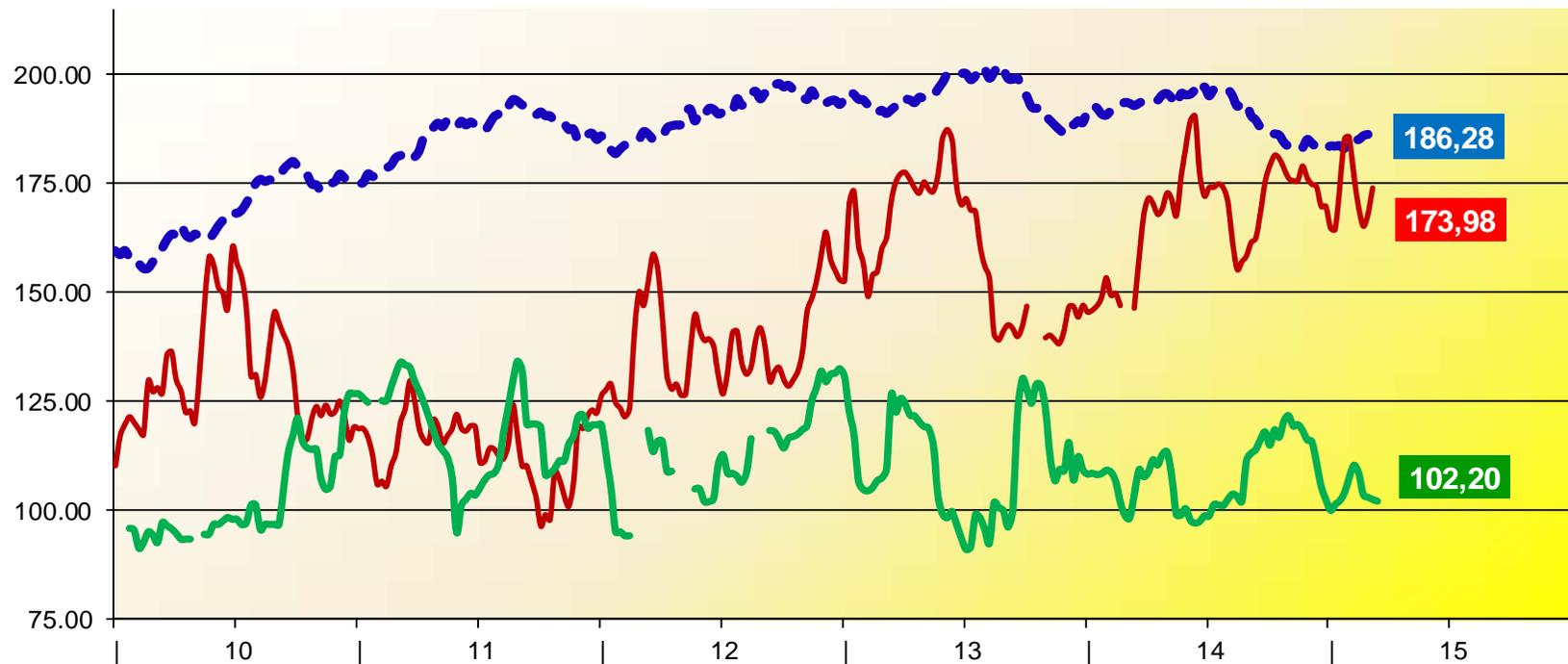


Development of the Community average market price for Broilers





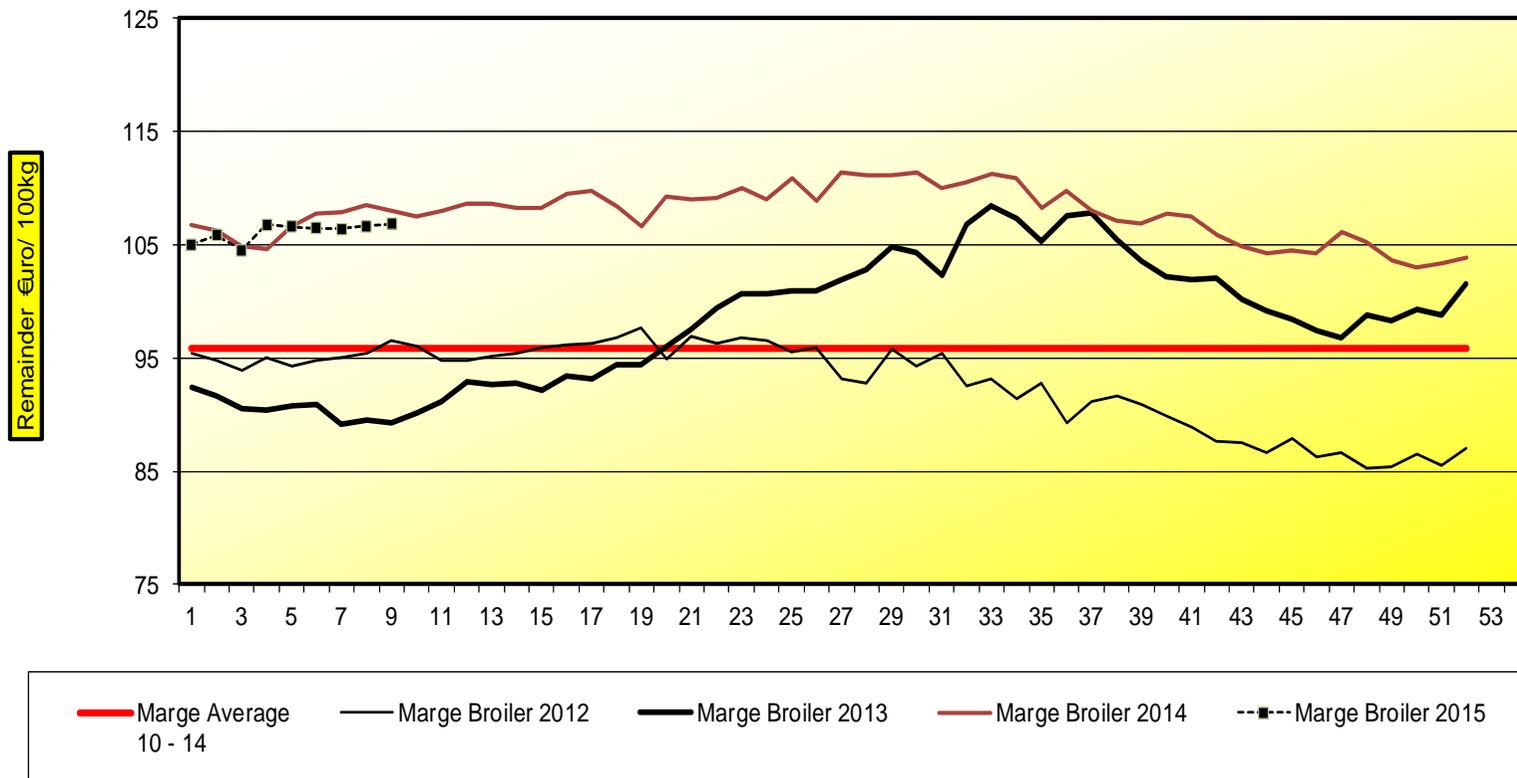
Broiler prices in EU, USA and Brazil in €uro/ 100kg



EU = weighted avg of MS prices Broiler 65%
 US = weekly USDA prices Fresh chicken grade A ,Chicago
 BR = avg of prices in main producing states (AveWorld.com.br)

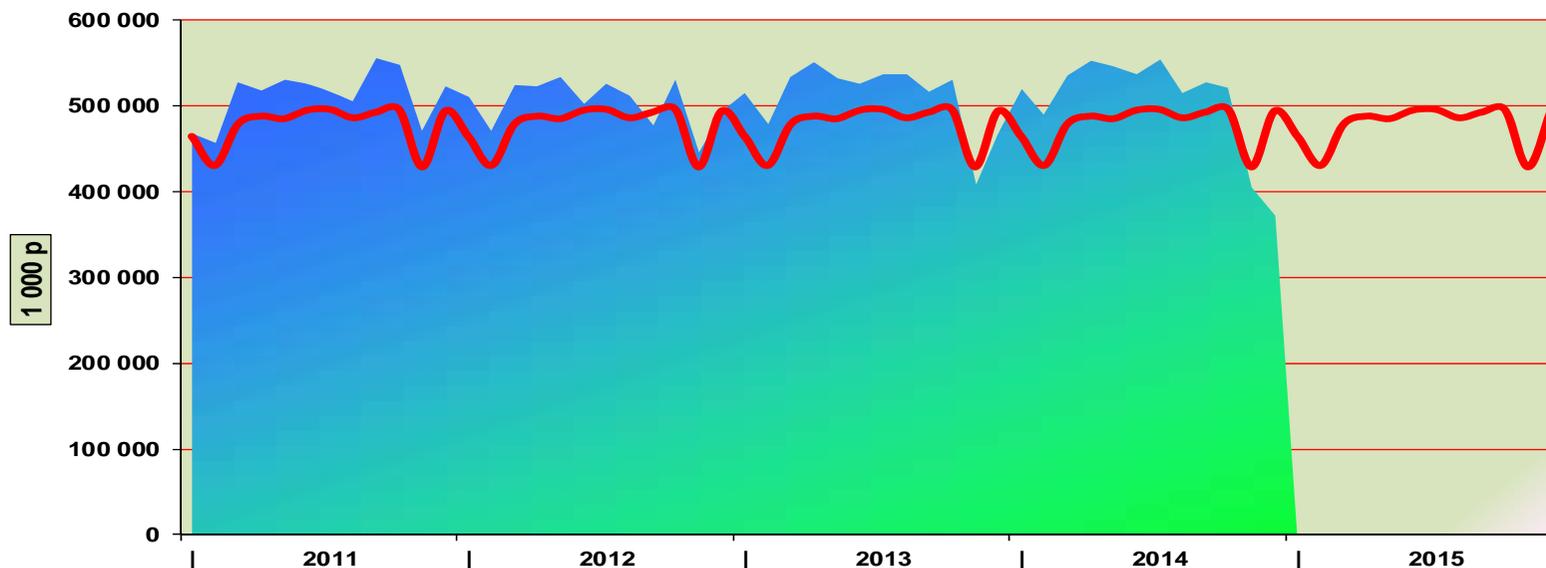
—•— EU broiler
 — US broiler €uro
 — BR Broil €uro/ (Ave world)

100KG Broiler minus feedcost for Broilers
feedconversionrate = 2,7 (2011) - 2,4 (2014)





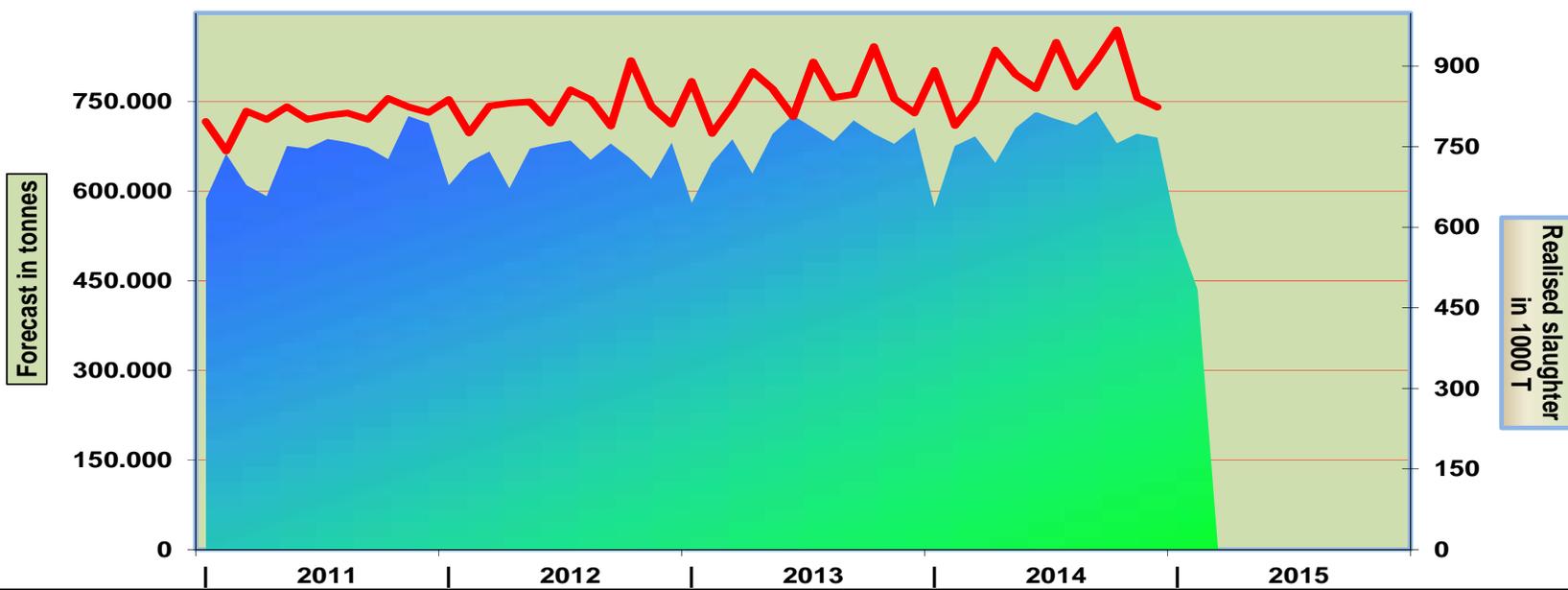
**Placings of Broiler chicks (1 000 pieces)
compared to the baseline trend**
(baseline= monthly avg 2010 - 2013)



	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
2013	513 645	477 489	532 079	549 359	531 593	524 160	535 570	535 521	514 895	529 349	443 478	511 348
2014	518 996	490 967	534 351	551 180	545 726	536 031	552 421	513 339	525 981	519 933	404 549	371 829
2015												

Placings Broiler (blue area) (baseline= monthly avg 2010 - 2013) - Broiler chicks (red line)

Forecast and Production of Broilers. In Tonn



	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
2013	580 736	647 722	686 792	629 810	696 568	727 383	705 763	683 621	718 661	695 745	679 356	706 715
2014	573 133	675 908	692 293	650 324	706 511	733 263	720 550	710 849	733 848	680 168	688 525	531 597
2015	529 871	436 096										

Forecast Production Broiler (Blue Area) Broiler slaughter (Red Line)

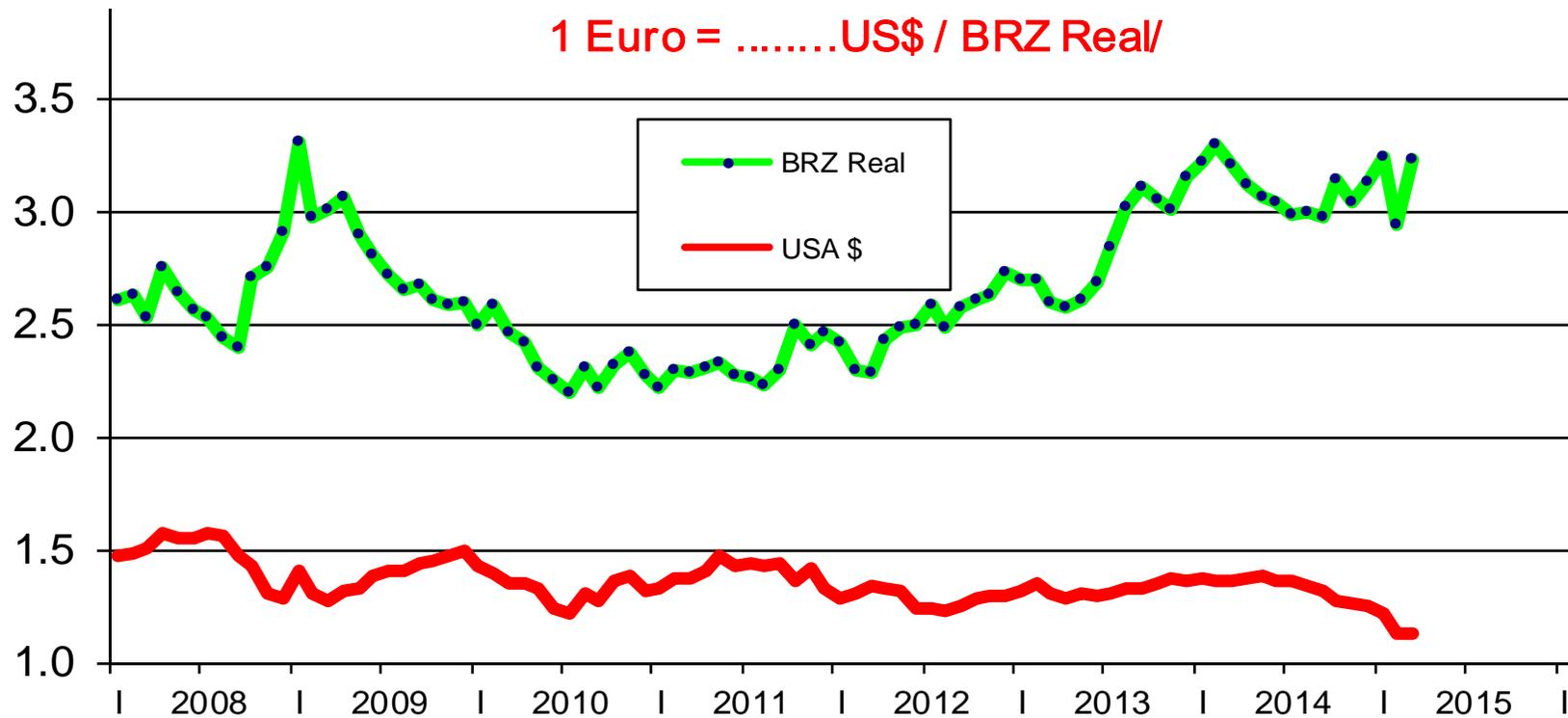


Parameters for the calculation of the estimated production of broilers

	BE	BG	CZ	DK	DE	EE	GR	ES	FR	HR	IE	IT	CY	LV
Parameter	2013													
National Average Live weight (kg) at Slaughter	2.40	2.10	1.90	2.10	2.11	2.39	2.40	2.66		1.99	2.04	2.60	2.64	2.10
National Average Carcass yield (%)	68%	73.0%	74.0%	75.0%	70.0%	71.0%	75.0%	70.2%		69.4%	71.7%	70.1%	77.0%	74.4%
National Average Mortality (%)	2.0%	4.3%	4.0%	2.5%	3.0-3.5% (l.w) 4.0% (h.w.)	2,5% - 3,0%	6.0%	5.2%		3.7%	2.9%	5.0%	3.2%	3.3%
National Average Period of rearing (days)	40.0	51*	35.0	35.0	30 - 38	37 - 40	45.0	43.5		35.0	36.9	35/46	47.4	37.1
	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK
Parameter	2013													
National Average Live weight (kg) at Slaughter	2.44	2.40	2.33	2.55	1.70	1.83	2.44	1.85	2.20	2.20	2.12	2.34	1.91	2.23
National Average Carcass yield (%)	75.1%	68%	70.1%		74.0%	66.0%	75.0%	69.9%	72.4%	70.5%	72.5%	72.5%	75.0%	69.0%
National Average Mortality (%)	5.0%	2.0%	4.2%	6.5%	3.5%	4.2%	4.2%	2.6%	2.5%	3.9%	3.5%	3.5%		4.8%
National Average Period of rearing (days)	40.0	40.0	41.5	45.0	41.0	35.00	42.0	37.8	41.0	37.7	38.5	37.0		42.0

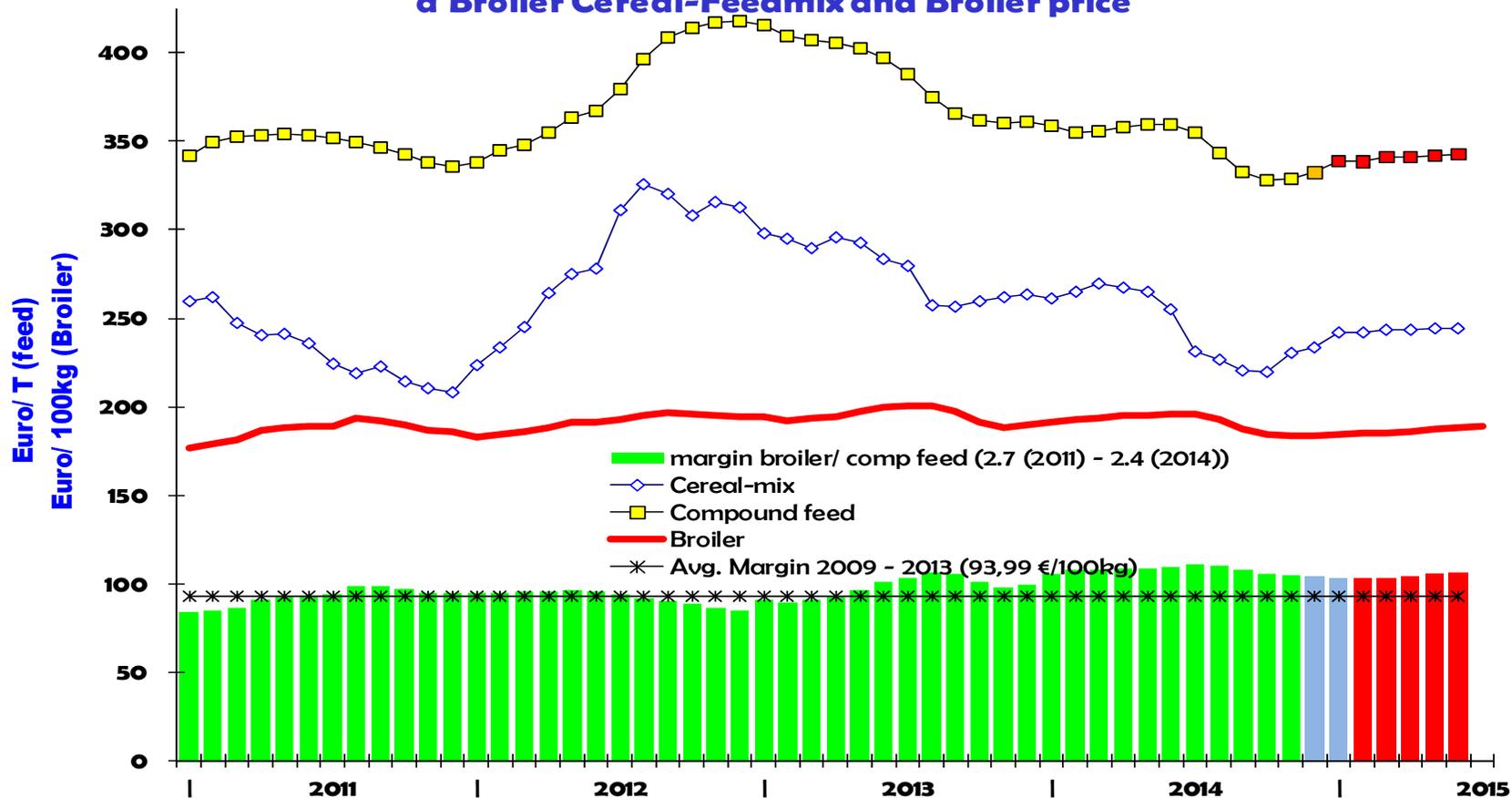
€uro Exchange rate

1 Euro =US\$ / BRZ Real/



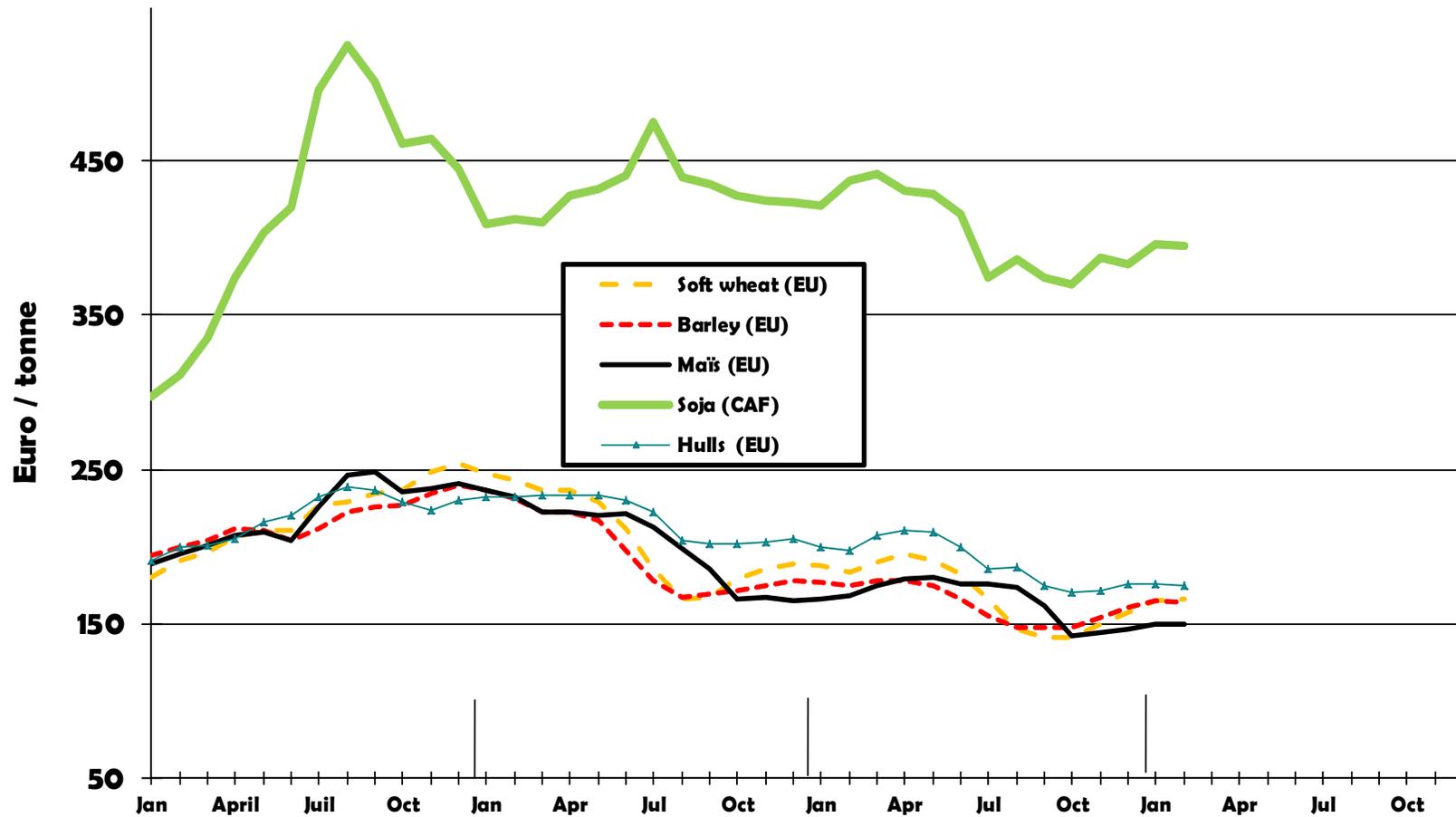
source:<http://europa.eu.int/comm/budget/inforeuro/fr/index.htm>

Price development of Compound feed for Broilers, a Broiler Cereal-Feedmix and Broiler price

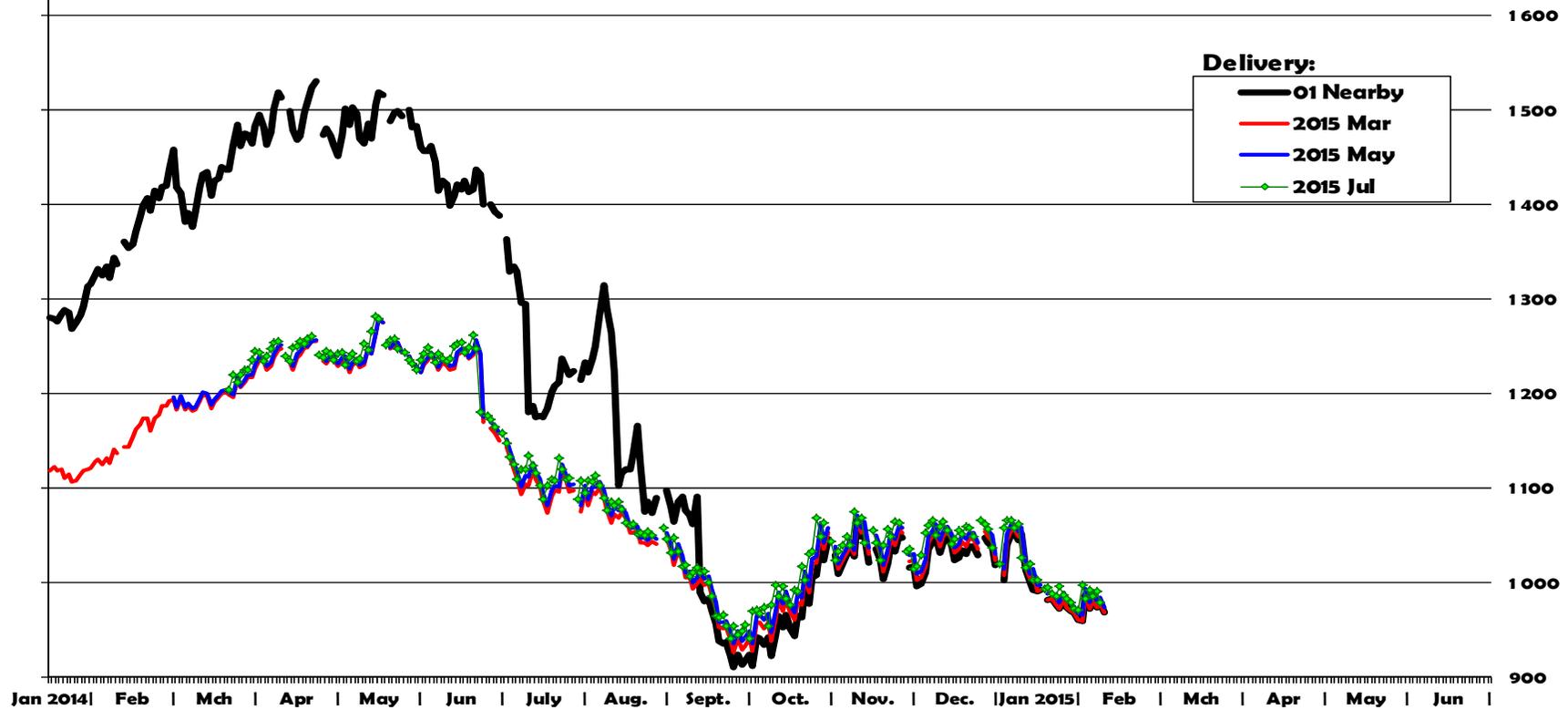


NB. Comp. Feed 2014 =Forecast as from December.
Cereal mix and Poultry = Forecast as from February 2015.

Price of Basic Ingredients 2012 - 2015

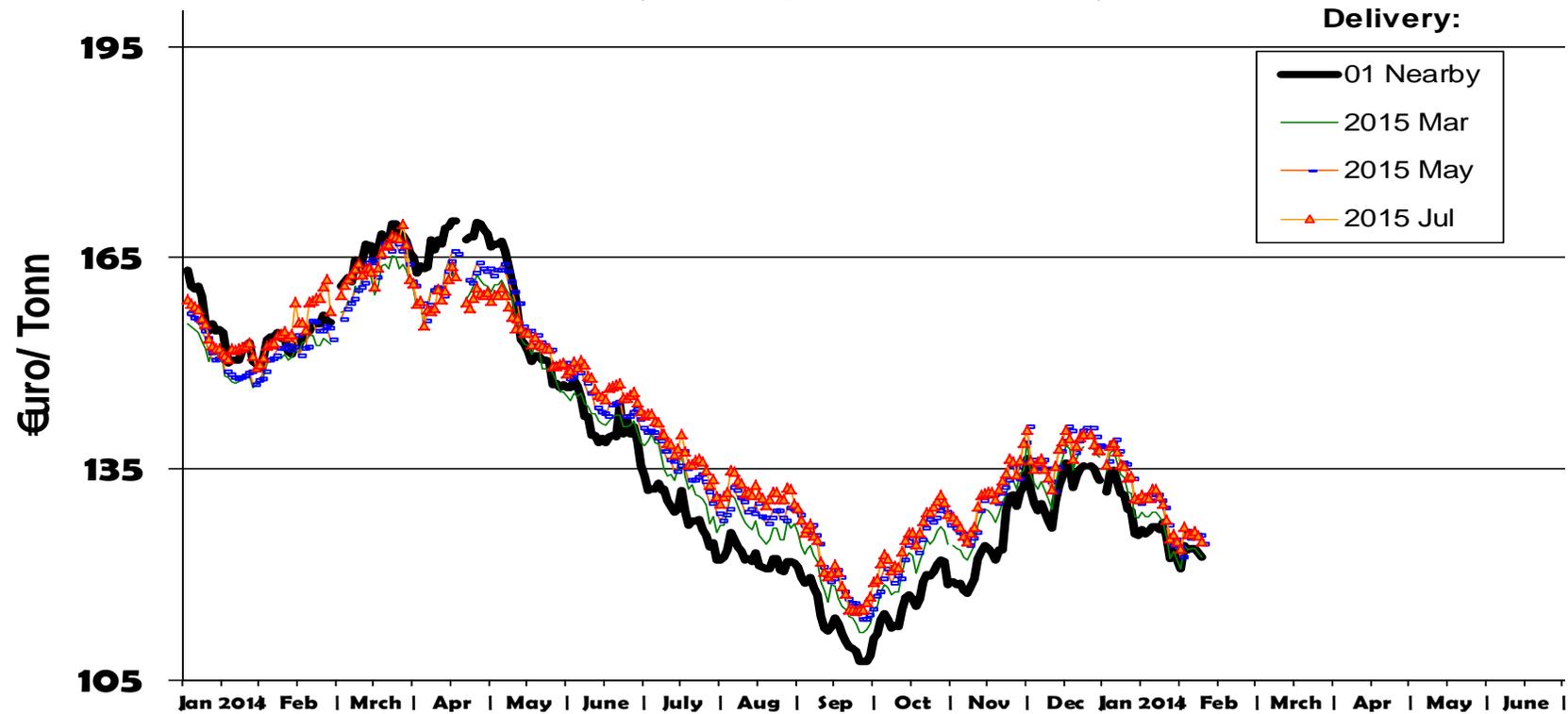


Futures for Soybeans in US\$ct/ Bushel (nearby = 2013 & 2014)



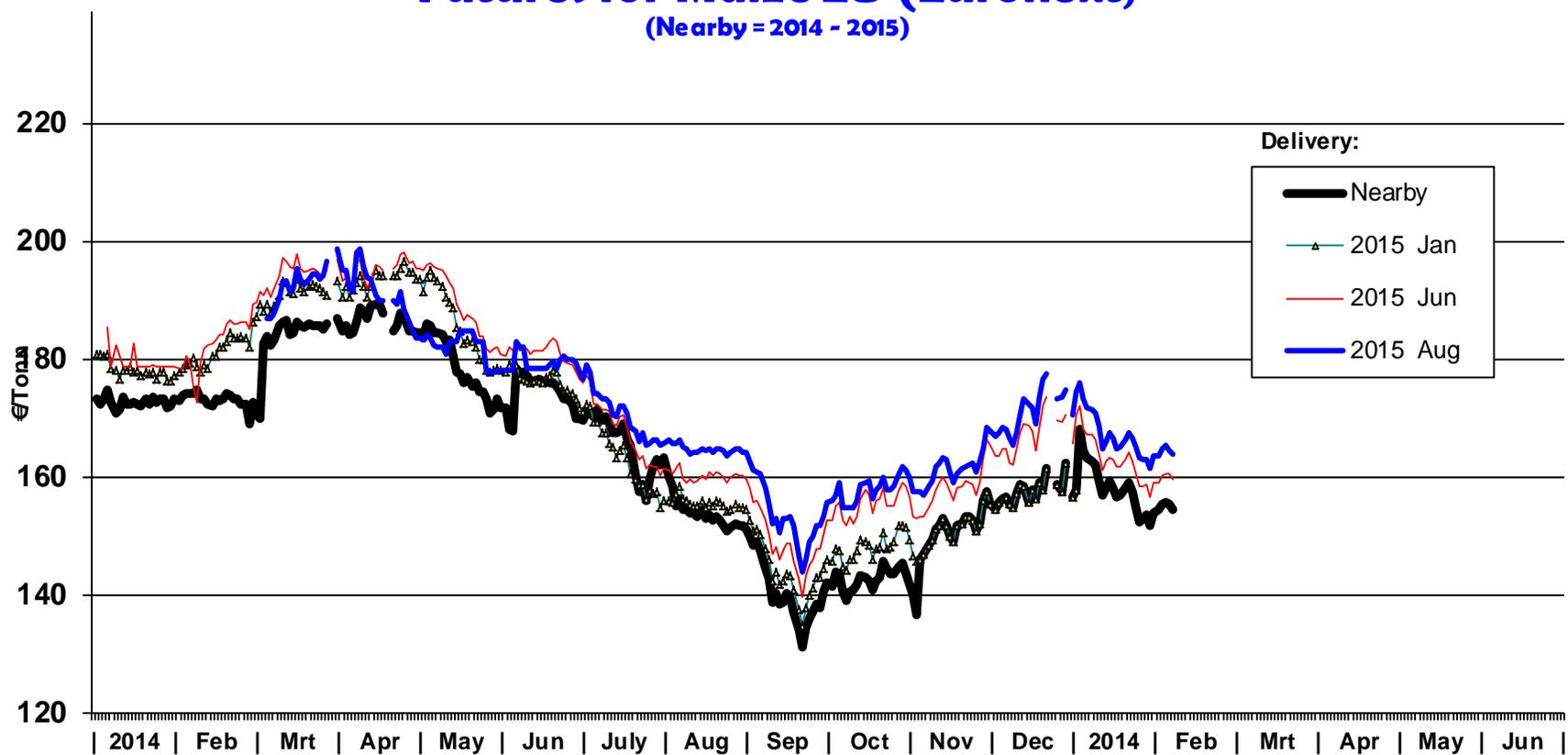


Futures for Feed wheat EU (Euronext) (Nearby = 2014 & 2015)

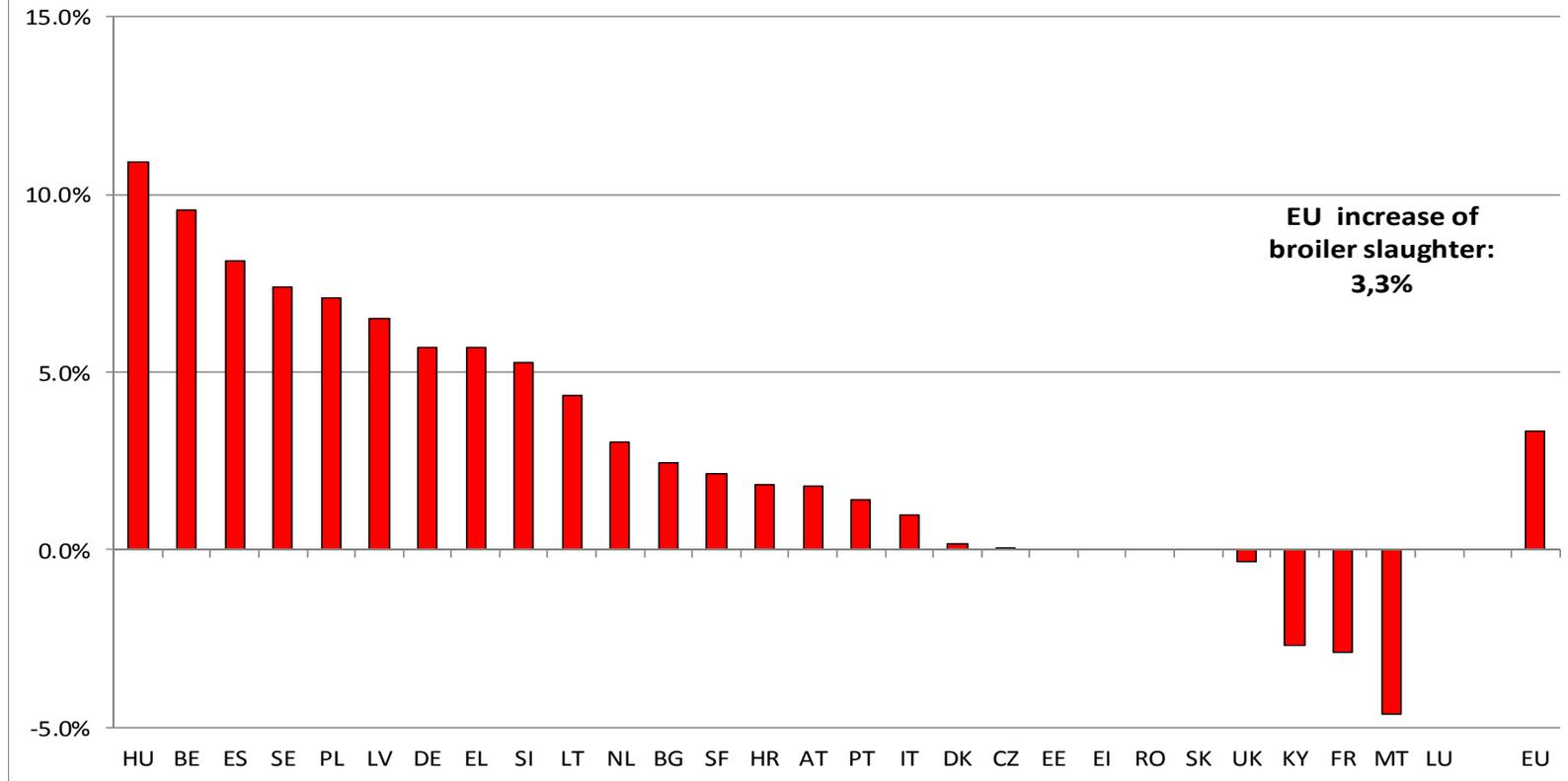




Futures for Maize EU (Euronext) (Nearby = 2014 - 2015)



Change in official Broiler slaughter by MS. 2014/2013

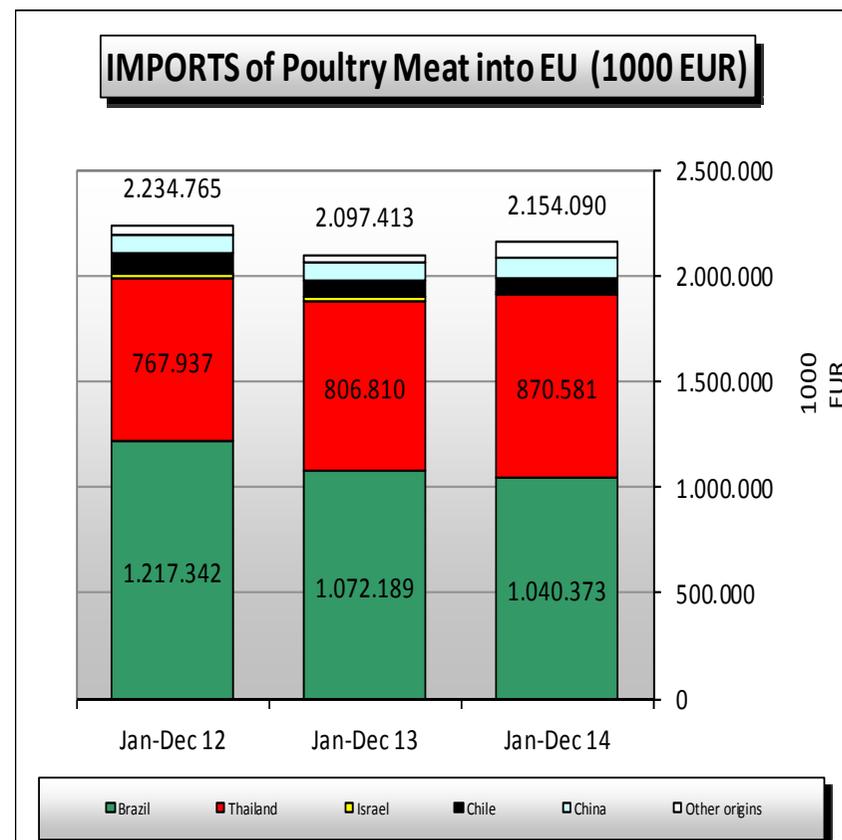
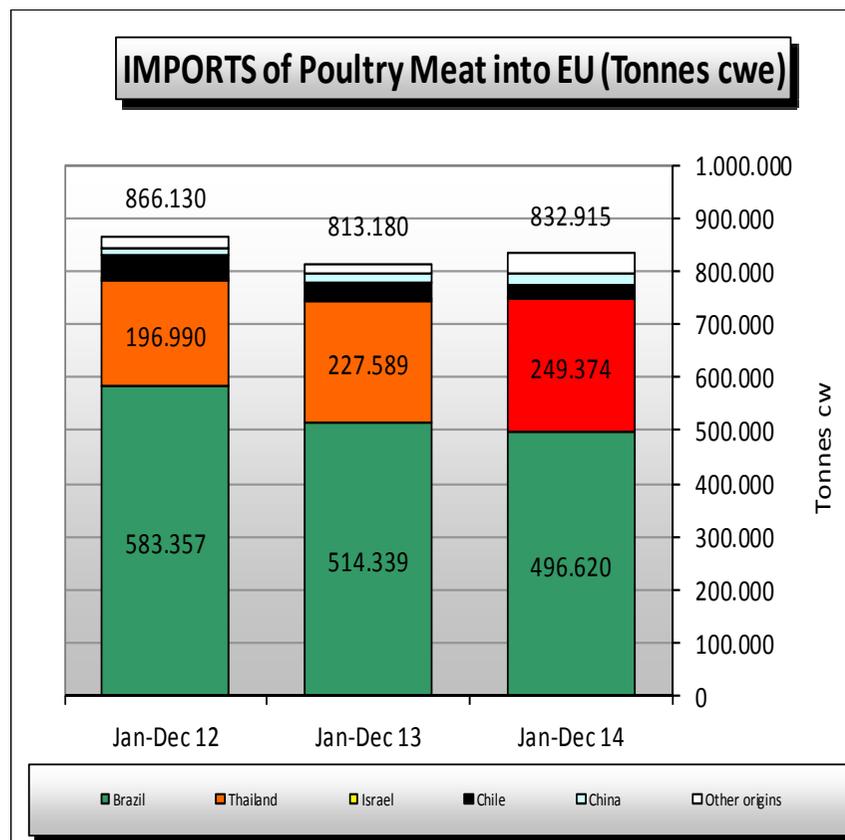


EU market situation for Poultry
10 Mars 2015

Imports of Poultry meat from selected origins

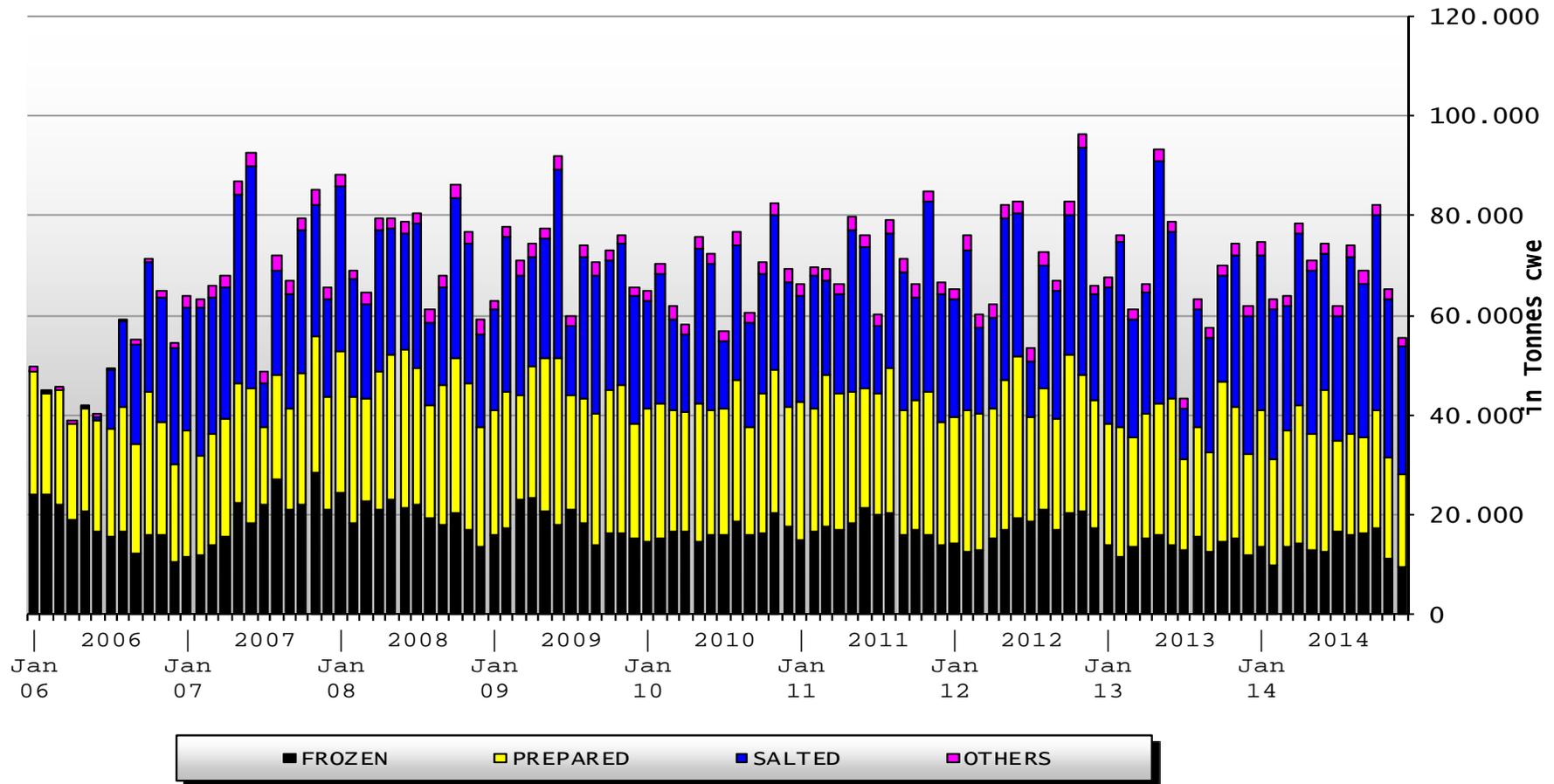
	2010		2011		2012		2013		Jan-Dec 14		Compared to Jan-Dec 13
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	599.759	73,1%	615.837	71,9%	583.450	67,3%	513.537	63,2%	496.620	59,6%	- 3%
Thailand	149.876	18,3%	155.790	18,2%	197.964	22,8%	228.243	28,1%	249.374	29,9%	+ 10%
Chile	34.403	4,2%	44.434	5,2%	42.192	4,9%	30.516	3,8%	25.801	3,1%	- 15%
Ukraine	2	0,0%	31	0,0%			276	0,0%	19.916	2,4%	+ 7111%
China	9.863	1,2%	13.875	1,6%	15.697	1,8%	18.184	2,2%	19.685	2,4%	+ 8%
Argentina	15.795	1,9%	15.700	1,8%	13.766	1,6%	10.783	1,3%	10.974	1,3%	+ 2%
Switzerland	673	0,1%	1.253	0,1%	3.817	0,4%	3.814	0,5%	4.195	0,5%	+ 10%
Israel	7.219	0,9%	7.144	0,8%	6.076	0,7%	6.306	0,8%	2.413	0,3%	- 62%
Others	3.410	0,4%	3.037	0,4%	4.247	0,5%	1.385	0,2%	3.937	0,5%	
EXTRA EU 28	820.999		857.100		867.209		813.044		832.915		
% change			+ 4%		+ 1%		- 6%		+ 2,4%		

EU Poultry meat Imports





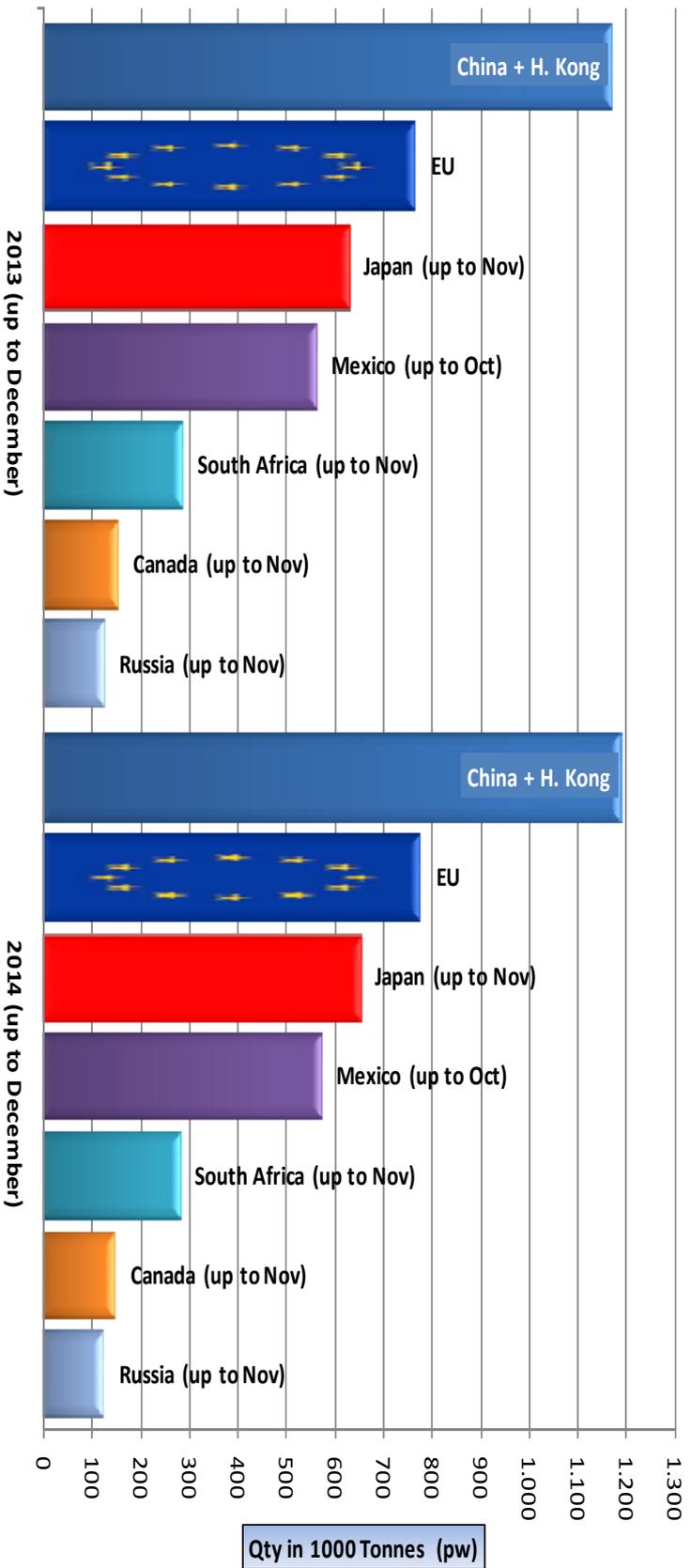
Imports of selected Poultry products



Main Importers of POULTRY Products (up to December)

Source : GTA & Eurostat

(excl.: live animals)

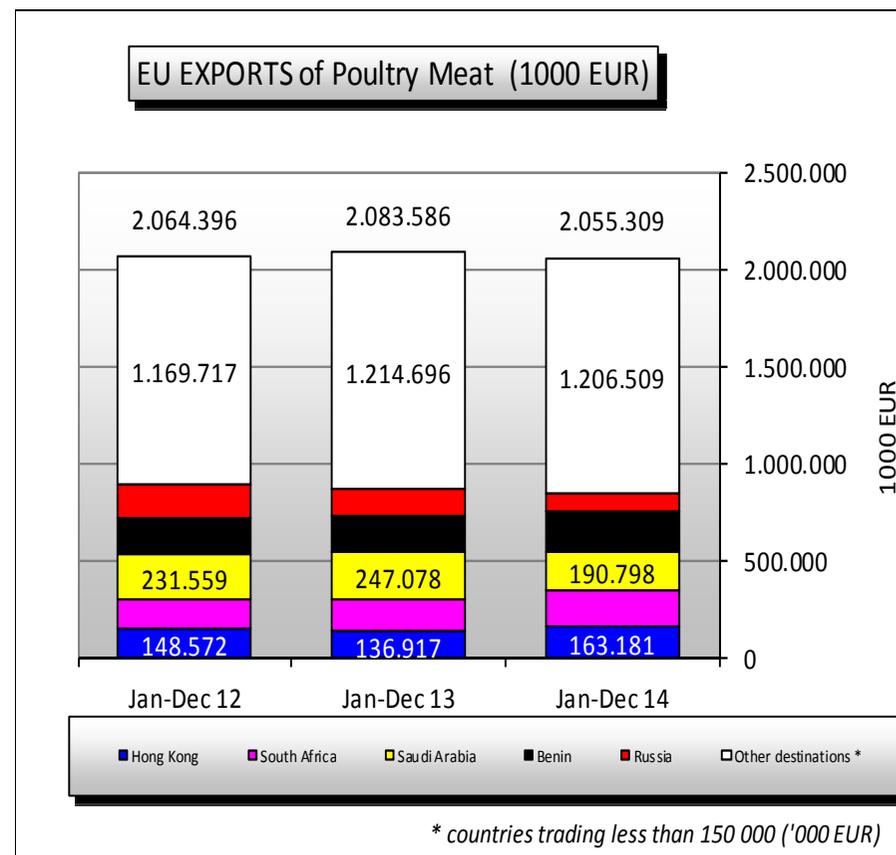
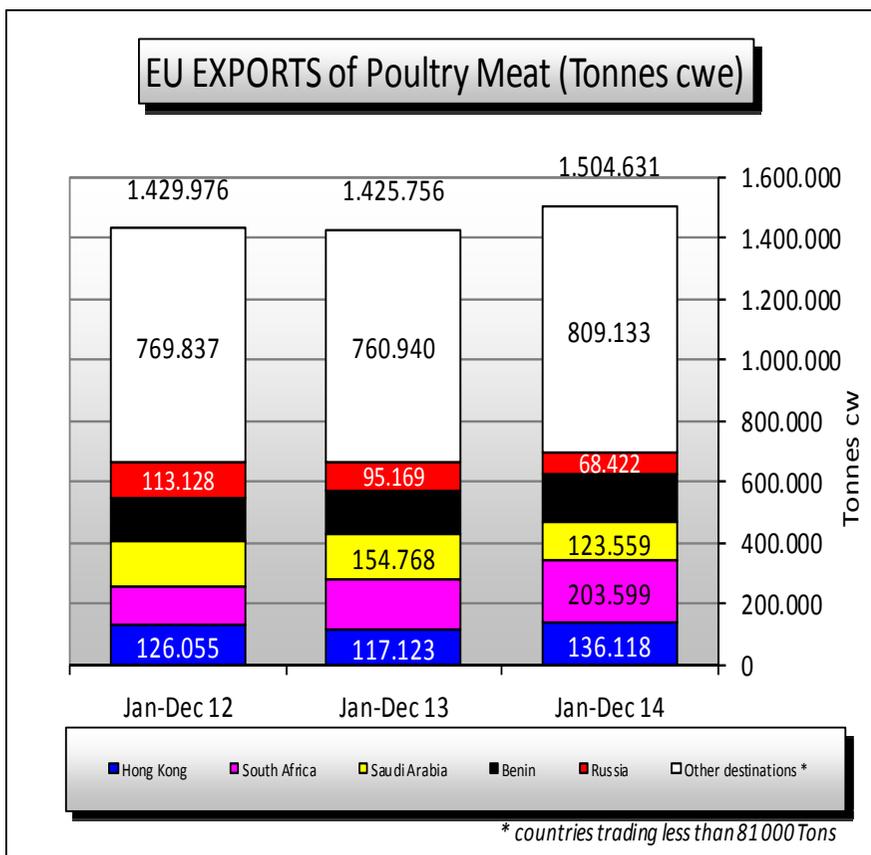




Exports of Poultry Meat to Selected Destinations

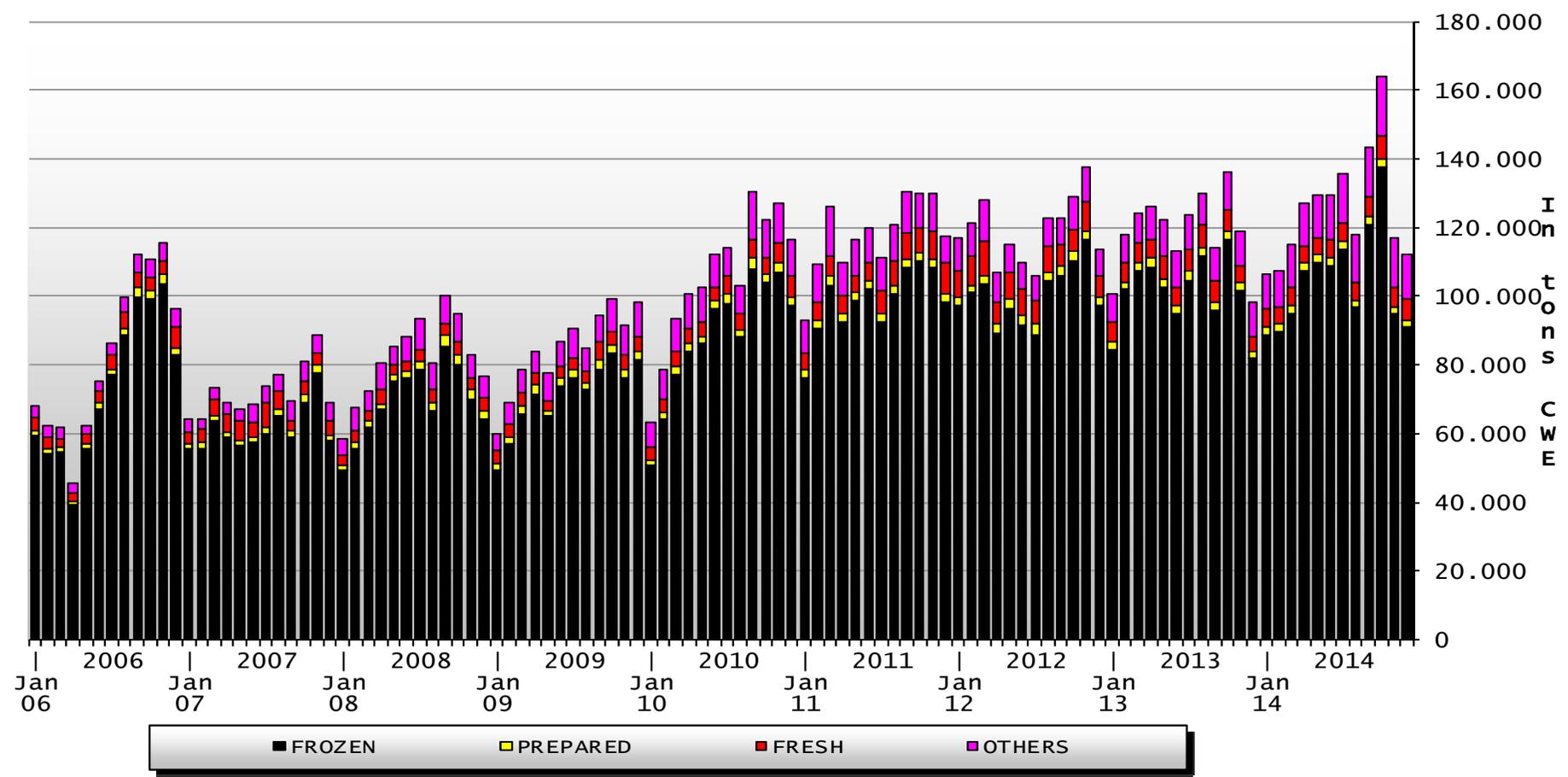
	2010		2011		2012		2013		Jan-Dec 14		Compared to Jan-Dec 13
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
South Africa	22.007	1,7%	94.084	6,7%	131.832	9,2%	158.481	11,1%	203.599	13,5%	+ 28%
Benin	115.066	9,1%	126.215	8,9%	139.820	9,8%	139.415	9,8%	163.801	10,9%	+ 18%
Hong Kong	151.729	12,0%	189.154	13,4%	126.074	8,8%	117.107	8,2%	136.118	9,0%	+ 16%
Saudi Arabia	118.019	9,3%	151.520	10,7%	149.310	10,4%	154.775	10,9%	123.559	8,2%	- 20%
Ukraine	86.009	6,8%	81.690	5,8%	103.429	7,2%	76.015	5,3%	80.570	5,4%	+ 6%
Russia	245.478	19,4%	115.138	8,1%	113.133	7,9%	95.183	6,7%	68.422	4,5%	- 28%
Philippines	15.087	1,2%	30.341	2,1%	30.765	2,2%	35.674	2,5%	57.664	3,8%	+ 62%
Ghana	41.066	3,2%	68.979	4,9%	69.157	4,8%	75.125	5,3%	56.857	3,8%	- 24%
Congo (Dem. Rep.)	27.749	2,2%	29.973	2,1%	34.232	2,4%	28.600	2,0%	33.723	2,2%	+ 18%
For.JRep.Mac	14.323	1,1%	24.792	1,8%	32.748	2,3%	36.531	2,6%	33.577	2,2%	- 8%
Switzerland	29.804	2,4%	29.411	2,1%	29.275	2,0%	30.709	2,2%	31.620	2,1%	+ 3%
Other Destinations	398.518	31,5%	472.361	33,4%	470.784	32,9%	478.856	33,6%	515.121	34,2%	
Extra-EU 28	1.264.856		1.413.657		1.430.558		1.426.472		1.504.631		
% change			+ 12%		+ 1%		- 0%		+ 5,5%		

EU Poultry meat Export



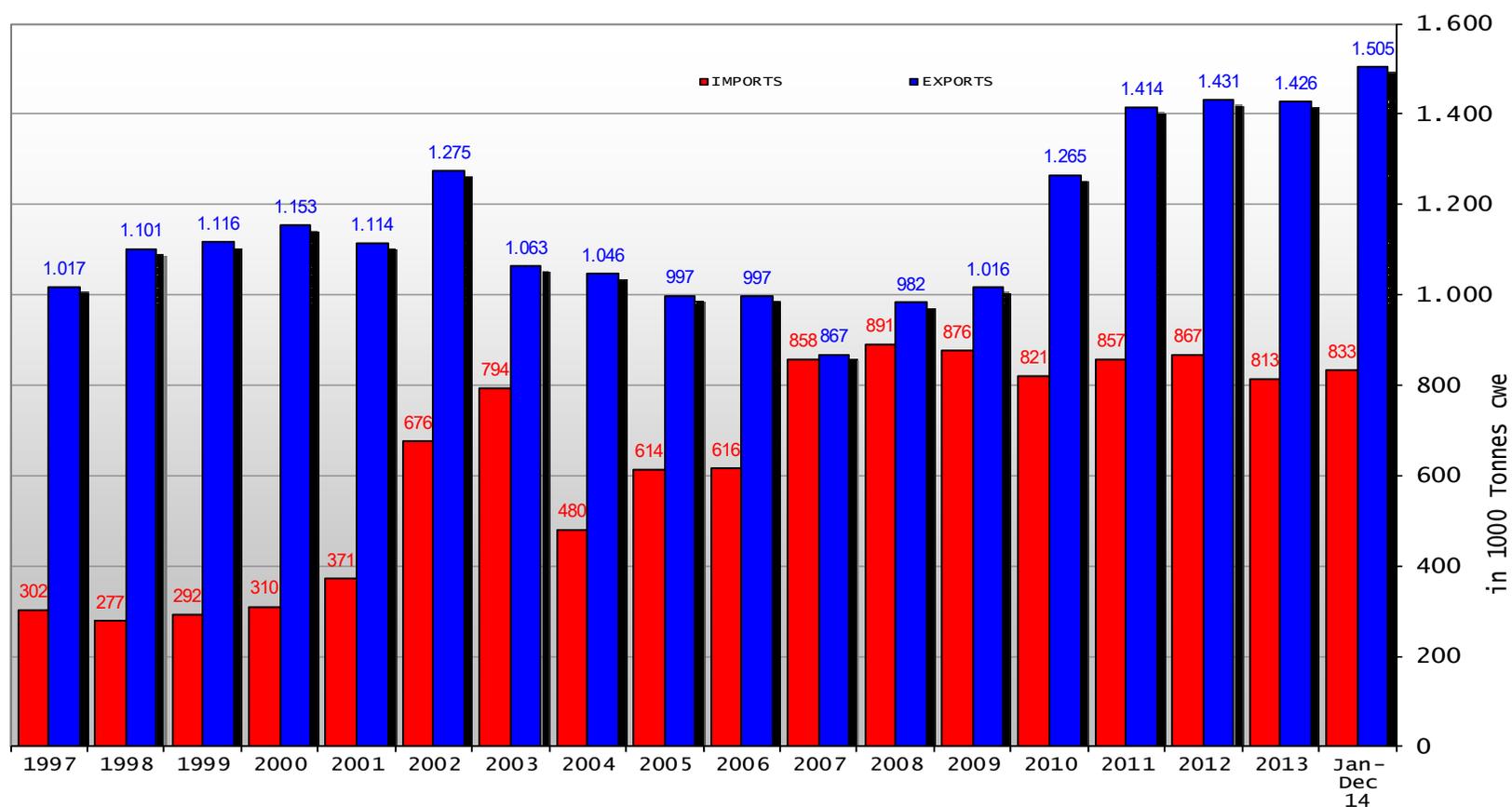


Exports of selected Poultry products

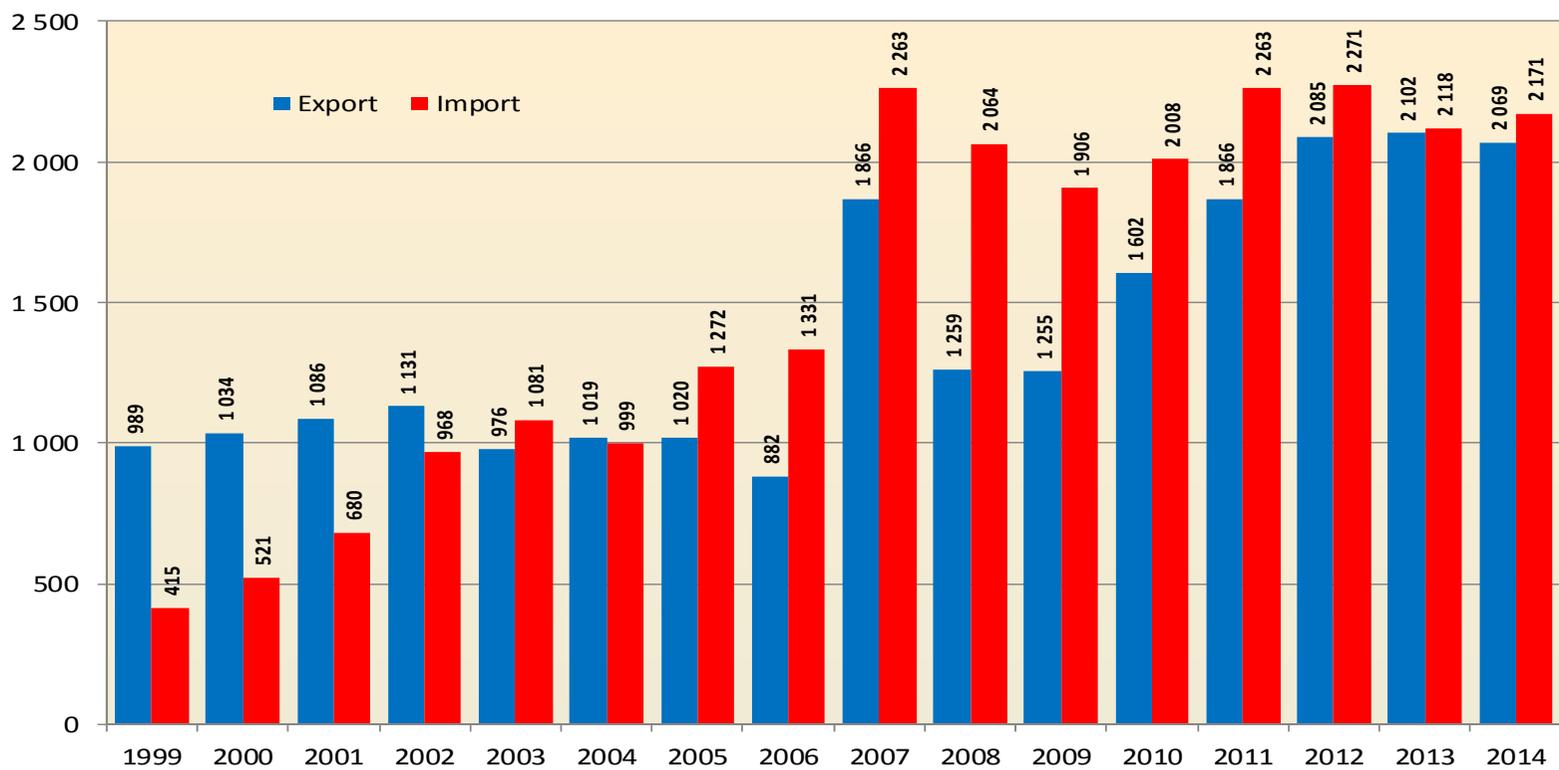




EU Poultry meat Trade Balance



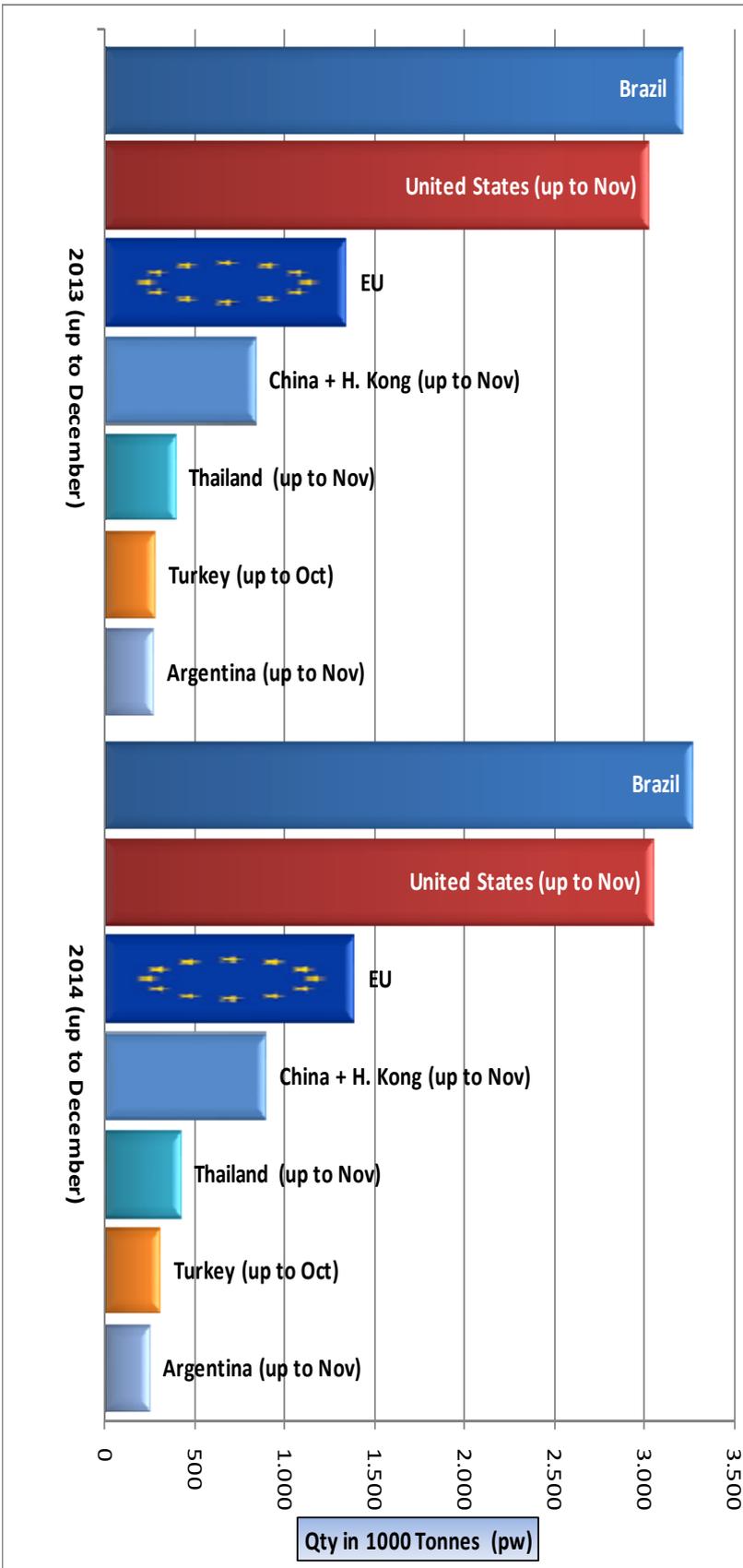
EU Poultry meat Trade Balance (In 1 000 000 €)



Main Exporters of POULTRY Products (up to December)

Source : GTA & Eurostat

(excl. live animals)





Where to find data:

- http://ec.europa.eu/agriculture/markets/index_en.htm
- *Click on link: Poultrymeat.*
- *Click on link: Presentations and prices.*
(righthand side under: in this chapter.)
- *Choose the item (link) you want.*