

EU Market Situation for Poultry

**Civil Dialogue Group
on Poultry & eggs**

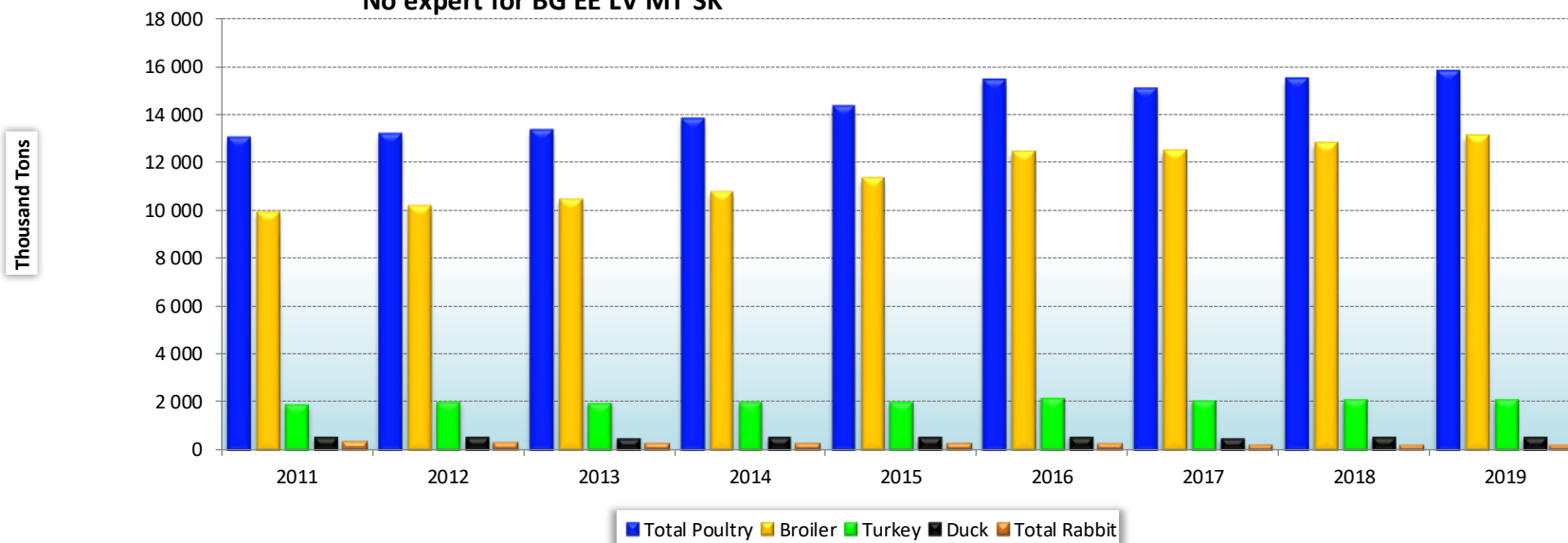
14 December 2018



Experts EU production forecast on Poultry and Rabbit

Missing or incomplete data for EL CY LT RO UK

No expert for BG EE LV MT SK



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% 2018/ 2017	% 2019/ 2018
Total Poultry	12 945	13 035	13 220	13 367	13 797	14 325	15 458	15 092	15 500	15 819	+ 2.7%	+ 2.1%
Broiler	9 876	9 932	10 173	10 445	10 729	11 295	12 403	12 468	12 782	13 082	+ 2.5%	+ 2.3%
Turkey	1 976	1 878	1 967	1 935	1 964	1 967	2 154	2 057	2 090	2 108	+ 1.6%	+ 0.8%
Duck	481	500	500	485	512	503	507	469	519	520	+ 10.5%	+ 0.3%
Total Rabbit	329	328	281	260	246	243	228	209	190	180	- 9.1%	- 5.2%

EU production of poultry (expert forecast Autumn 2018)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019	%2018/2017		%2019/2018	
PL	2 510 300	2 629 825	2 748 400	4.8		4.5	
FR	1 777 600	1 850 500	1 912 500	4.1		3.4	
UK	1 734 100	1 776 700	1 776 700	2.5		0.0	
DE	1 716 800	1 721 900	1 736 000	0.3		0.8	
ES	1 453 700	1 538 200	1 576 340	5.8		2.5	
IT	1 354 000	1 325 000	1 367 000	-2.1		3.2	
NL	1 118 000	1 119 000	1 119 000	0.1		0.0	
HU	601 633	643 522	645 000	7.0		0.2	
RO	398 000	415 000	415 000	4.3		0.0	
PT	337 400	341 000	342 300	1.1		0.4	
BE	410 000	424 800	435 400	3.6		2.5	
IE	205 000	217 000	229 000	5.9		5.5	
EL	192 000	192 000	192 000	0.0		0.0	
CZ	183 000	194 000	194 100	6.0		0.1	
DK	155 600	156 800	157 800	0.8		0.6	
SE	147 900	143 800	147 000	-2.8		2.2	
FI	130 000	138 500	142 500	6.5		2.9	
LT	133 000	140 000	140 000	5.3		0.0	
AT	131 388	131 870	137 350	0.4		4.2	
BG	102 000	102 000	102 000	0.0		0.0	
SK	86 000	86 000	86 000	0.0		0.0	
HR	79 500	81 500	84 500	2.5		3.7	
SI	68 020	65 500	67 350	-3.7		2.8	
CY	24 700	23 900	23 900	-3.2		0.0	
LV	21 000	21 000	21 000	0.0		0.0	
EE	15 000	15 000	15 000	0.0		0.0	
EU	15 091 641	15 500 317	15 819 140	2.7		2.1	

EU production of broiler (expert forecast Autumn 2018)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019	%2018/2017		%2019/2018	
PL	2 055 000	2 156 000	2 264 000		4.9		5.0
UK	1 552 100	1 603 300	1 603 300		3.3		0.0
DE	1 294 800	1 304 500	1 315 000		0.7		0.8
FR	1 163 000	1 221 000	1 282 000		5.0		5.0
ES	1 250 000	1 300 000	1 340 000		4.0		3.1
NL	1 100 000	1 100 000	1 100 000		0.0		0.0
IT	1 034 000	1 013 000	1 050 000		-2.0		3.7
HU	408 570	413 691	420 000		1.3		1.5
RO	388 000	400 000	400 000		3.1		0.0
PT	287 000	289 000	290 000		0.7		0.3
BE	403 000	417 500	427 900		3.6		2.5
IE	180 000	190 000	200 000		5.6		5.3
EL	185 000	185 000	185 000		0.0		0.0
DK	153 800	155 000	156 000		0.8		0.6
CZ	164 800	175 000	175 000		6.2		0.0
SE	147 900	143 800	147 000		-2.8		2.2
FI	122 000	130 000	134 000		6.6		3.1
LT	123 000	130 000	130 000		5.7		0.0
AT	108 370	109 500	114 980		1.0		5.0
SK	80 100	80 100	80 100		0.0		0.0
BG	75 000	75 000	75 000		0.0		0.0
HR	67 000	68 000	69 000		1.5		1.5
SI	62 860	60 000	61 250		-4.5		2.1
CY	24 500	24 500	24 500		0.0		0.0
LV	17 000	17 000	17 000		0.0		0.0
EE	13 780	13 780	13 780		0.0		0.0
EU	12 467 980	12 782 071	13 082 210		2.5		2.3

EU production of turkey (expert forecast Autumn 2018)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019	%2018/2017	%2019/2018
PL	376 000	384 000	392 000	2.1	2.1
DE	376 700	372 000	375 000	-1.2	0.8
FR	368 500	367 000	365 000	-0.4	-0.5
IT	309 000	300 000	305 000	-2.9	1.7
ES	200 000	235 000	233 000	17.5	-0.9
UK	151 400	144 000	144 000	-4.9	0.0
HU	96 780	97 670	98 000	0.9	0.3
PT	40 300	41 500	41 800	3.0	0.7
NL	28 000	28 000	28 000	0.0	0.0
IE	25 000	27 000	29 000	8.0	7.4
AT	22 370	22 370	22 370	0.0	0.0
RO	10 000	15 000	15 000	50.0	0.0
HR	12 000	13 000	15 000	8.3	15.4
FI	8 000	8 500	8 500	6.3	0.0
CZ	6 500	7 000	7 000	7.7	0.0
LT	5 300	5 500	5 500	3.8	0.0
SE	5 000	5 500	5 500	10.0	0.0
SI	5 160	5 500	6 100	6.6	10.9
BE	7 000	7 300	7 500	4.3	2.7
EL	2 500	2 500	2 500	0.0	0.0
SK	1 000	1 000	1 000	0.0	0.0
DK	500	500	500	0.0	0.0
CY	200	200	200	0.0	0.0
BG	100	100	100	0.0	0.0
LV					
EE					
MT					
EU	2 057 310	2 090 140	2 107 570	1.6	0.8

EU production of duck (expert forecast Autumn 2018)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019	%2018/2017	%2019/2018
FR	203 600	219 000	222 000	7.6	1.4
HU	68 036	99 771	95 000	46.6	-4.8
PL	47 500	48 500	51 000	2.1	5.2
DE	40 500	40 600	41 000	0.2	1.0
UK	30 600	29 400	29 400	-3.9	0.0
BG	22 000	22 000	22 000	0.0	0.0
NL	18 000	19 000	19 000	5.6	0.0
CZ	11 100	11 400	11 500	2.7	0.9
PT	10 100	10 500	10 500	4.0	0.0
IE	5 800	6 200	6 200	6.9	0.0
IT	5 500	6 000	6 000	9.1	0.0
ES	3 700	3 200	3 340	-13.5	4.4
SK	600	600	600	0.0	0.0
DK	1 800	1 800	1 800	0.0	0.0
HR	400	400	400	0.0	0.0
EL	100	100	100	0.0	0.0
AT	138	138	138	0.0	0.0
LT	5	5	5	0.0	0.0
BE					
SI					
SE					
RO					
FI					
CY					
LV					
EE					
MT					
EU	469 479	518 614	519 983	10.5	0.3

EU production of rabbit (expert forecast Autumn 2018)

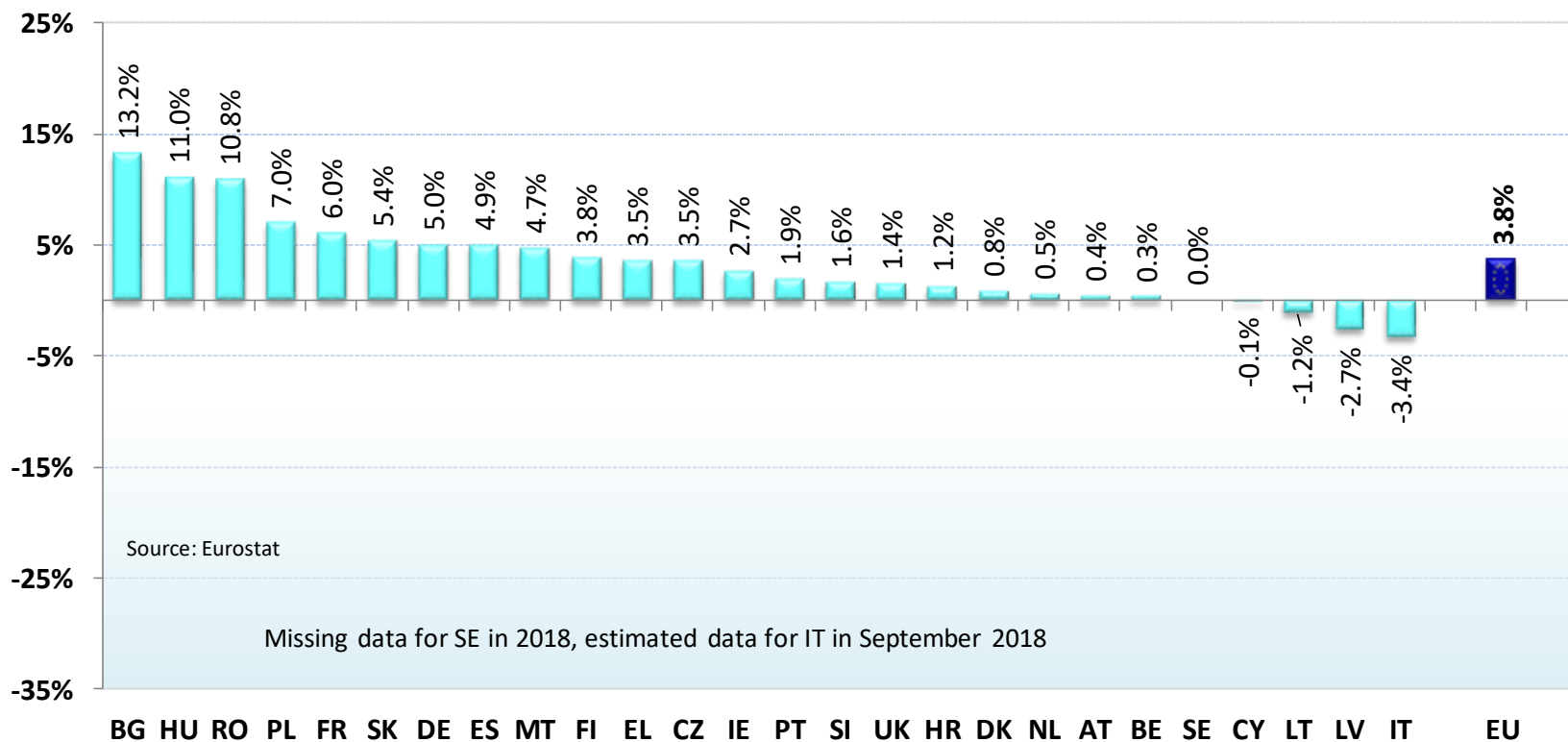
Source : Experts WG

Qty in Tonnes

% change

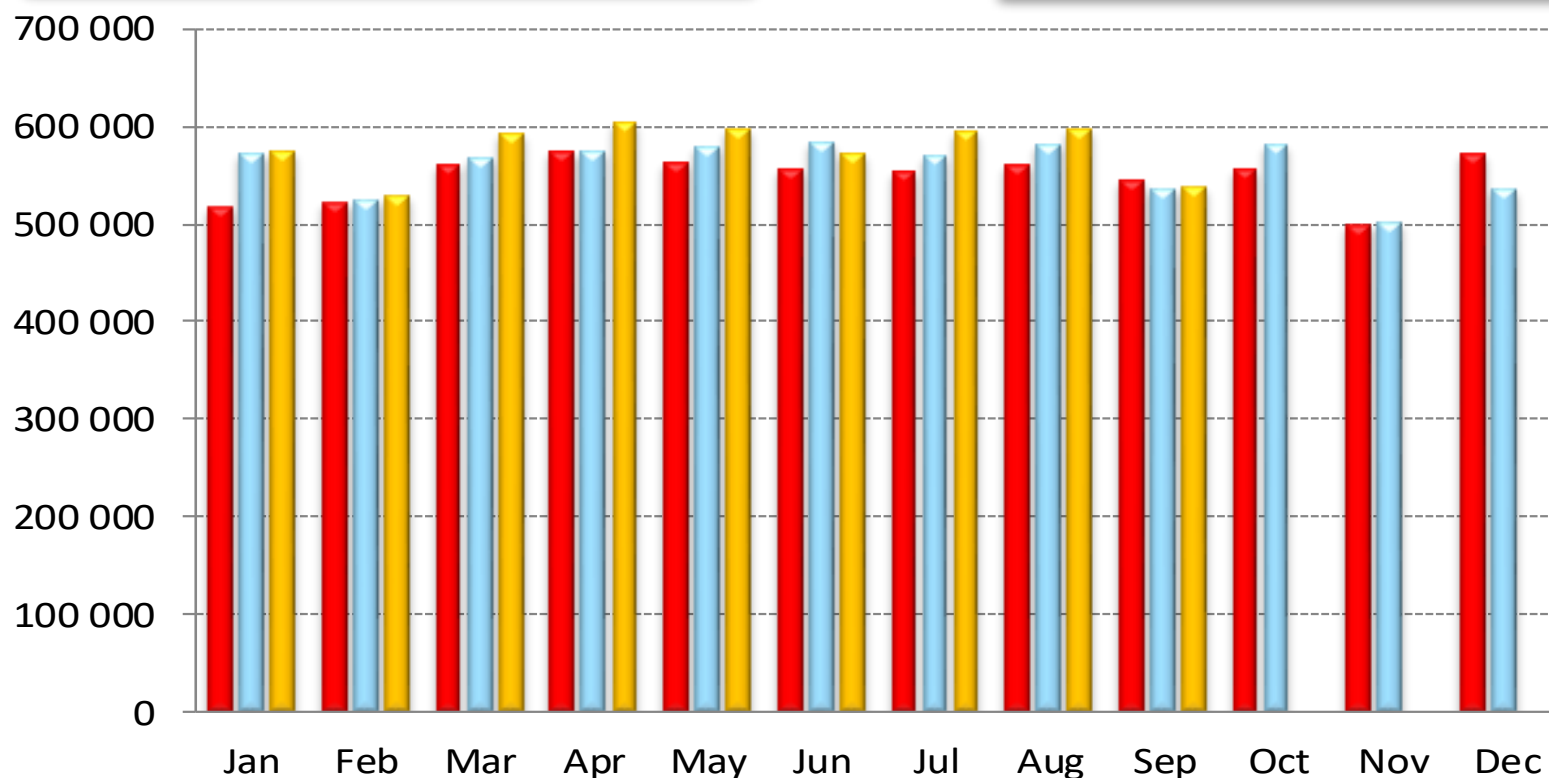
	2017	2018	2019	%2018/2017	%2019/2018
ES	57 000	53 000	52 000	-7.0	-1.9
FR	61 000	50 000	45 000	-18.0	-10.0
IT	44 000	40 000	36 000	-9.1	-10.0
PL	24 000	24 000	24 000	0.0	0.0
BE	30	30	30	0.0	0.0
CZ	9 100	9 100	9 100	0.0	0.0
PT	4 900	4 900	5 000	0.0	2.0
EL	5 000	5 000	5 000	0.0	0.0
SK	3 600	3 600	3 600	0.0	0.0
CY	600	600	600	0.0	0.0
LT	2	2	2	0.0	0.0
MT					
AT	0	0	0		
DK	0	0	0		
IE	0	0	0		
NL					
BG					
UK					
DE					
HU					
SE					
RO					
FI					
HR					
LV					
EE					
SI					
EU	209 232	190 232	180 332	-9.1	-5.2

Change in Poultry Meat Production in % 2018/2017 (up to September)



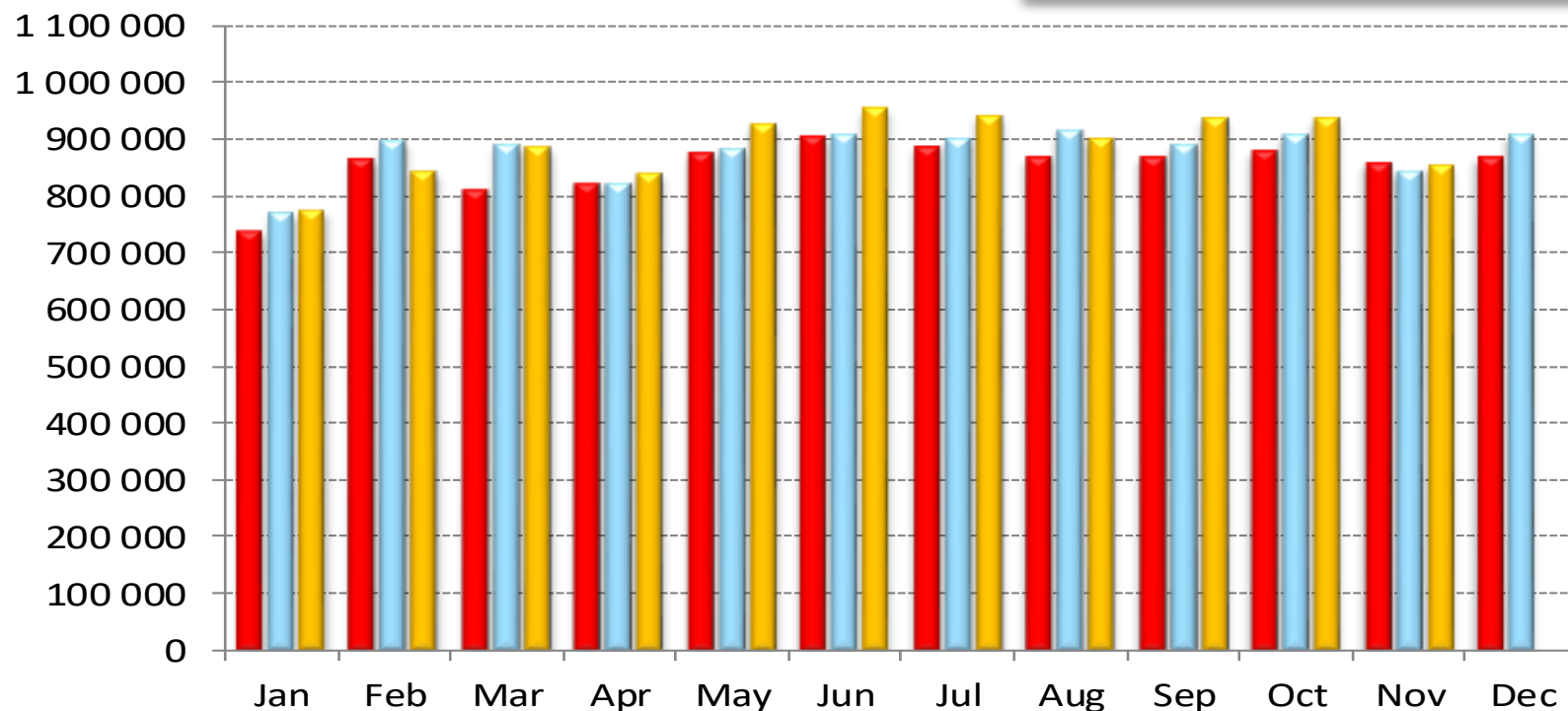
Chicks hatched for fattening (1 000 pieces)

■ 2016 ■ 2017 ■ 2018

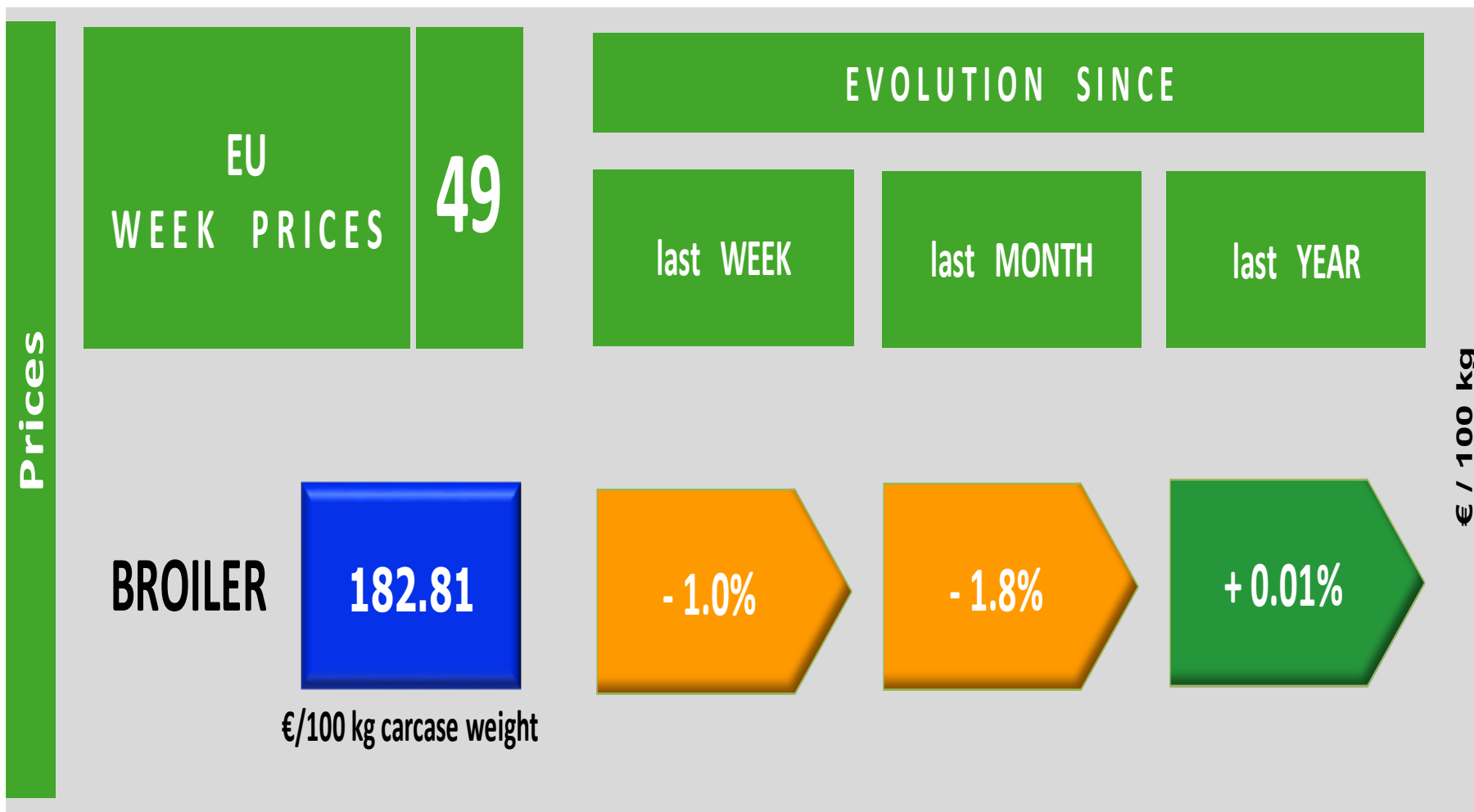


Production forecast of broiler (In tonnes)

■ 2016 ■ 2017 ■ 2018

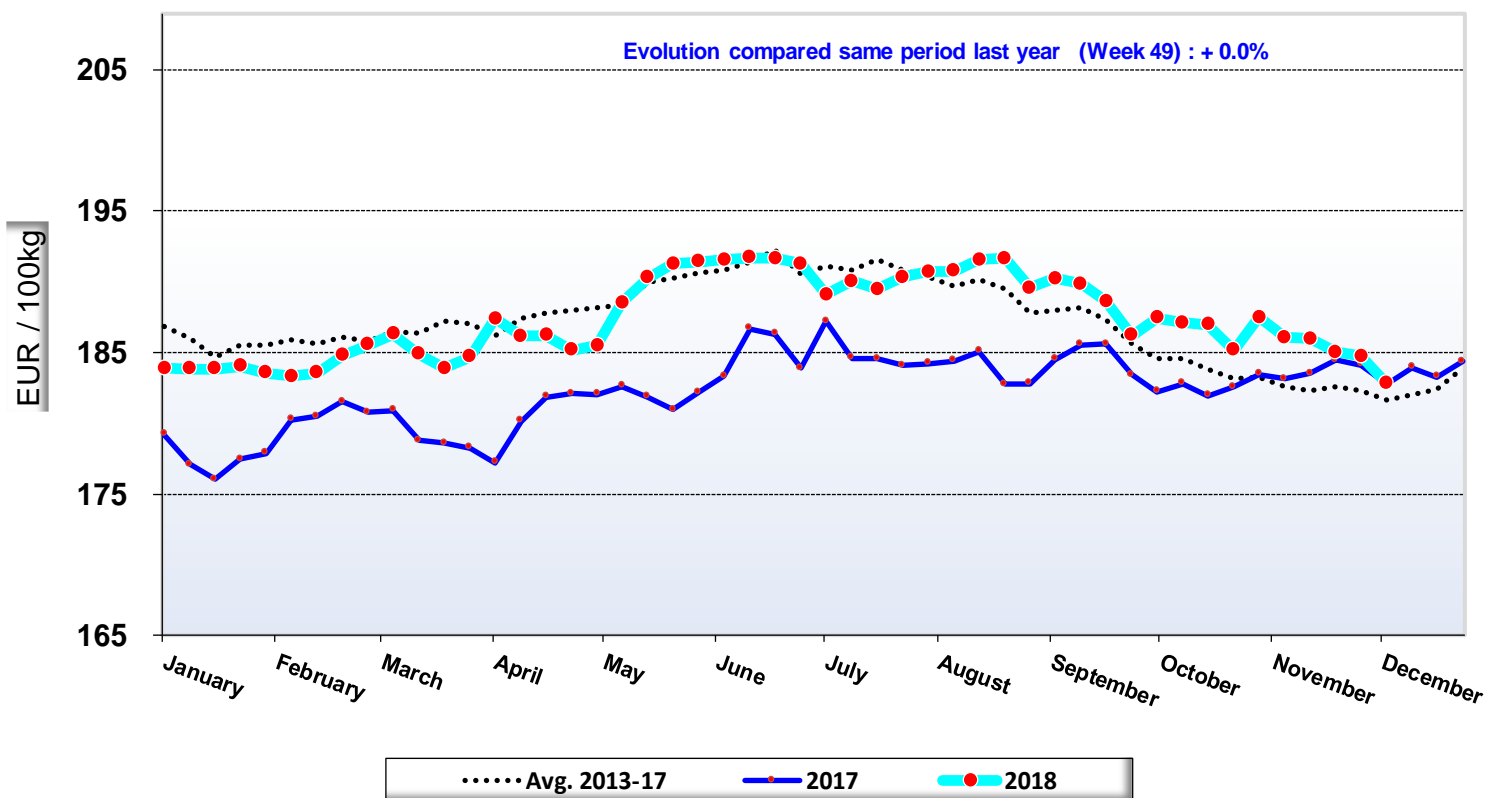


PRICES



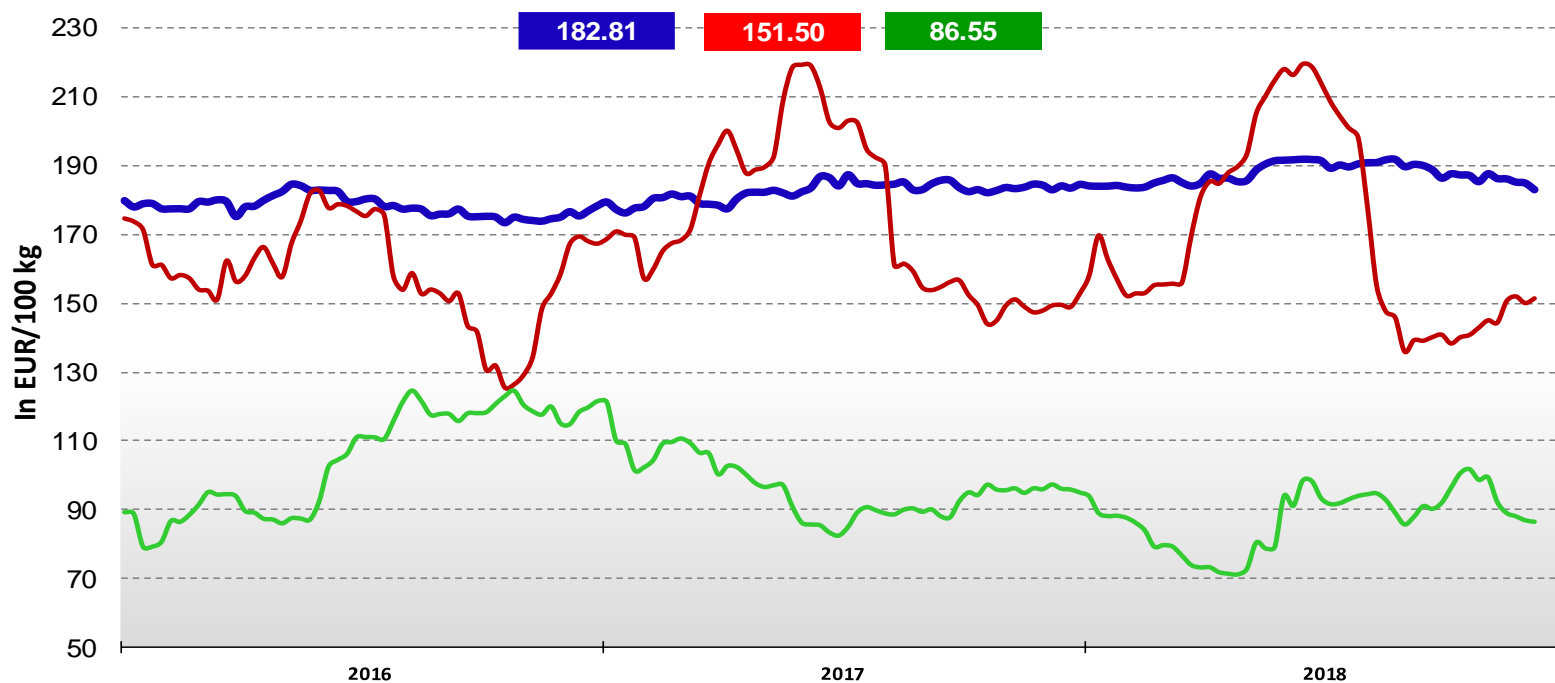
Evolution of the weekly EU average price for **Broiler**

Latest price ==> 182.81 EUR/100 kg



Source: MSs notifications (Commission Implementing Regulation (EC) 2017/1185)

Broiler prices in EU, USA and Brazil



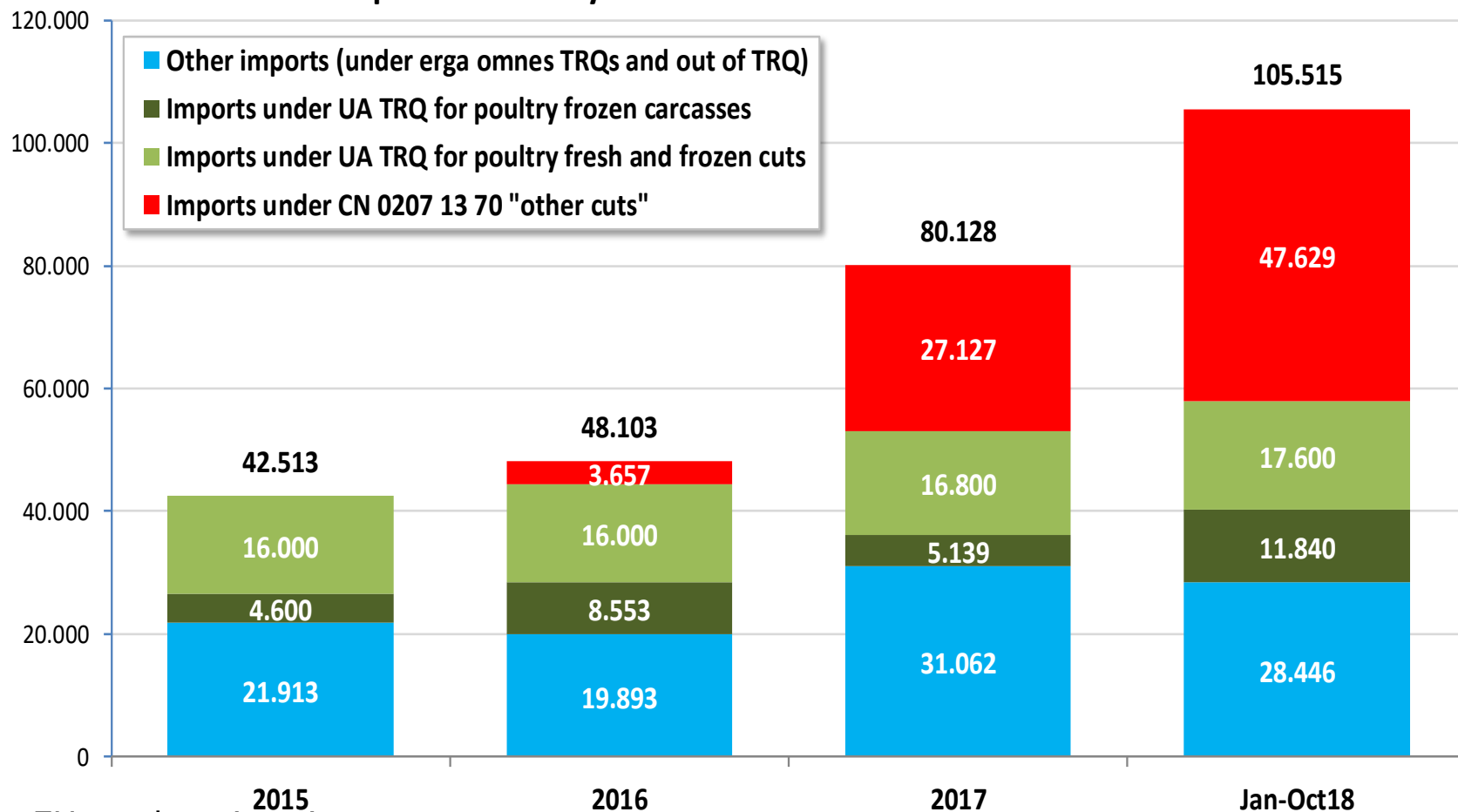
Sources : EU = weighted average of MS prices - Broiler 65%
 US = weekly USDA prices - Fresh chicken grade A ,Chicago
 BR = average of prices in main producing states - (Aveworld.com.br)

EU US BR

Imports of poultry meat from selected origins

	2014		2015		2016		2017		Jan-Oct 18		Compared to Jan-Oct 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Thailand	251 185	29.7%	274 524	31.4%	290 602	32.2%	265 927	32.9%	260 697	37.9%	+ 17%
Brazil	507 355	60.0%	501 328	57.3%	504 814	55.9%	401 598	49.7%	254 230	37.0%	- 26%
Ukraine	19 958	2.4%	42 513	4.9%	48 103	5.3%	80 128	9.9%	105 515	15.3%	+ 60%
Chile	25 815	3.1%	22 232	2.5%	28 809	3.2%	24 972	3.1%	33 731	4.9%	+ 77%
China	19 761	2.3%	18 384	2.1%	16 951	1.9%	19 107	2.4%	19 987	2.9%	+ 28%
Argentina	10 996	1.3%	8 529	1.0%	6 491	0.7%	6 297	0.8%	6 255	0.9%	+ 15%
Switzerland	4 307	0.5%	2 424	0.3%	2 548	0.3%	2 736	0.3%	2 646	0.4%	+ 13%
Turkey	16	0.0%			441	0.0%	149	0.0%	1 481	0.2%	+++
Others	6 351	0.8%	4 984	0.6%	3 554	0.4%	6 341	0.8%	3 063	0.4%	
Extra-EU	845 743		874 919		902 313		807 254		687 602		
% change			+ 3.4%		+ 3.1%		- 10.5%		+ 1.0%		

Imports of Poultry meat from Ukraine in tonnes of cwe



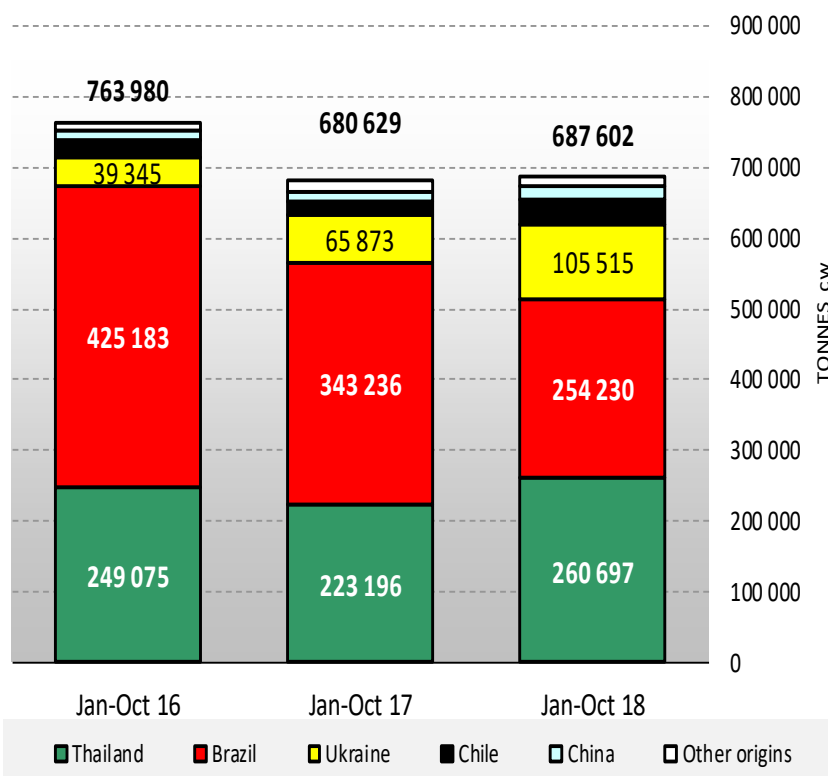
EU market situation
for Poultry

14 December 2018

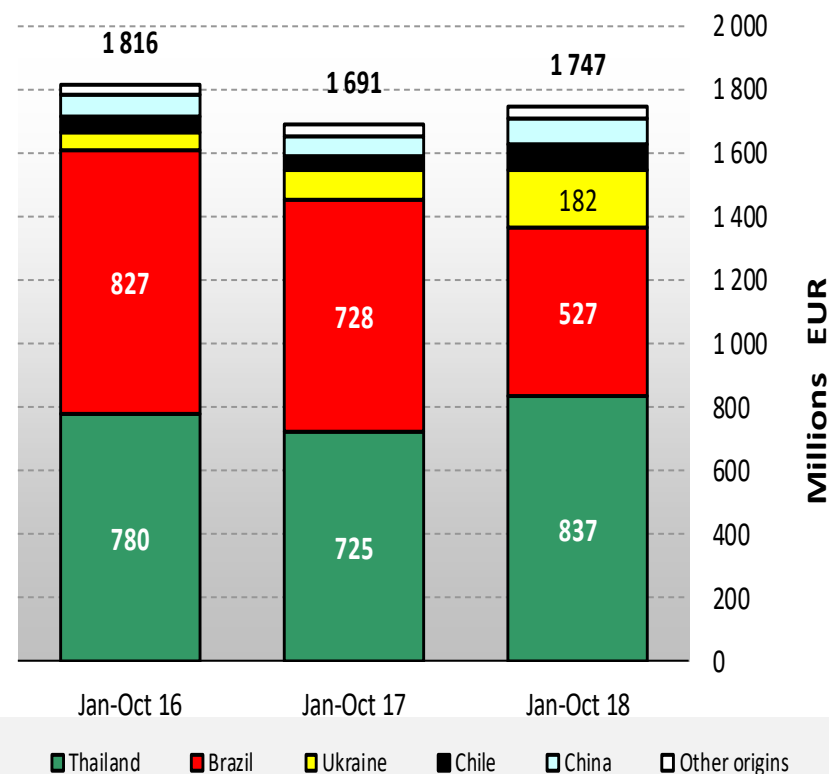


EU Poultry meat Imports

EU IMPORTS of Poultry Meat (TONNES cwe)



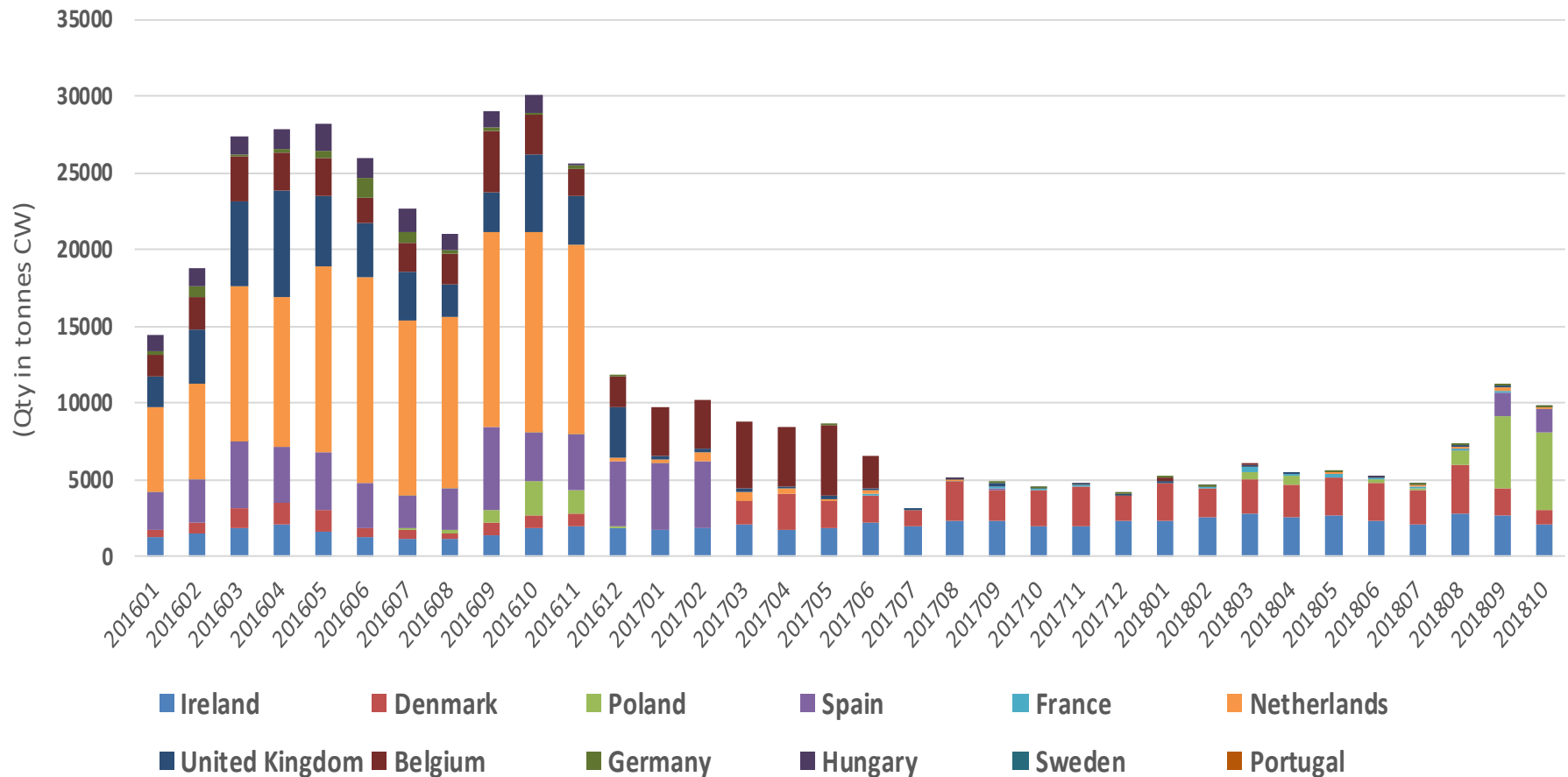
EU IMPORTS of Poultry Meat (Millions EUR)



Exports of Poultry Meat to Selected Destinations

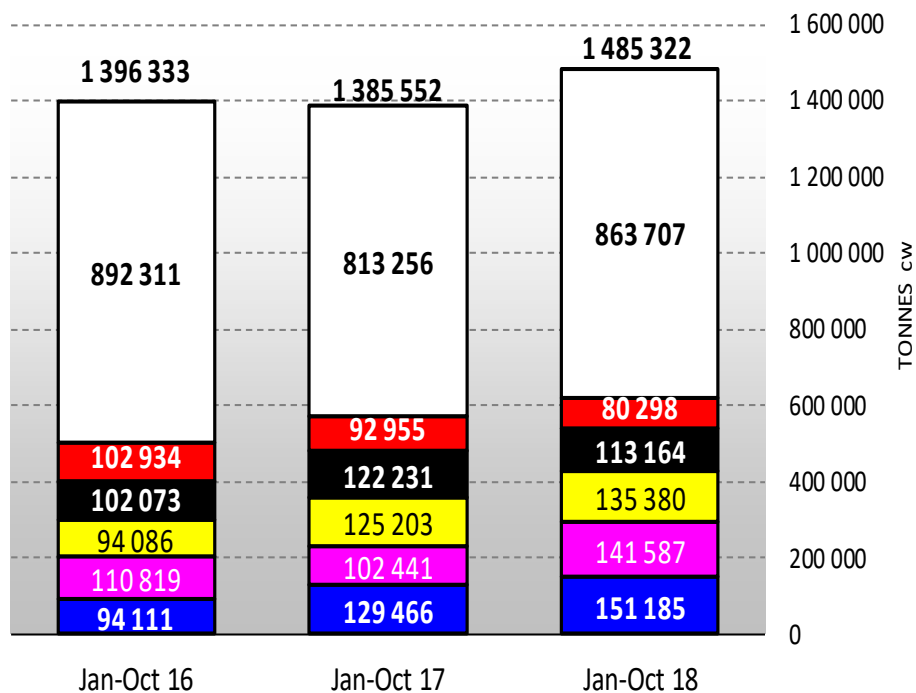
	2014		2015		2016		2017		Jan-Oct 18		Compared to Jan-Oct 17
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Ukraine	80 084	5.3%	90 851	6.0%	114 841	6.8%	162 627	9.7%	151 185	10.2%	+ 17%
Philippines	57 566	3.8%	100 644	6.7%	126 694	7.5%	127 788	7.6%	141 587	9.5%	+ 38%
Ghana	57 394	3.8%	81 025	5.4%	115 783	6.9%	146 958	8.8%	135 380	9.1%	+ 8%
Hong Kong	136 233	9.0%	101 008	6.7%	123 855	7.4%	148 157	8.9%	113 164	7.6%	- 7%
Benin	164 460	10.9%	139 324	9.2%	120 685	7.2%	105 709	6.3%	80 298	5.4%	- 14%
Vietnam	19 884	1.3%	27 128	1.8%	36 292	2.2%	53 329	3.2%	74 409	5.0%	+ 66%
Saudi Arabia	123 574	8.2%	142 496	9.4%	121 645	7.2%	98 788	5.9%	71 100	4.8%	- 12%
South Africa	204 451	13.5%	214 951	14.3%	282 770	16.8%	78 491	4.7%	64 618	4.4%	- 7%
Congo (Dem. Rep.)	33 753	2.2%	35 849	2.4%	46 260	2.8%	60 080	3.6%	61 870	4.2%	+ 32%
Gabon	30 026	2.0%	37 877	2.5%	32 340	1.9%	49 183	2.9%	38 106	2.6%	- 11%
Russia	68 363	4.5%	1 223	0.1%	1 108	0.1%	996	0.1%	728	0.0%	+ 0%
Other Destinations	533 442	35.3%	535 694	35.5%	556 990	33.2%	638 909	38.2%	552 875	37.2%	
Extra-EU	1 509 229		1 508 071		1 679 264		1 671 015		1 485 322		
% change			- 0.1%		+ 11.4%		- 0.5%		+ 7.2%		

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



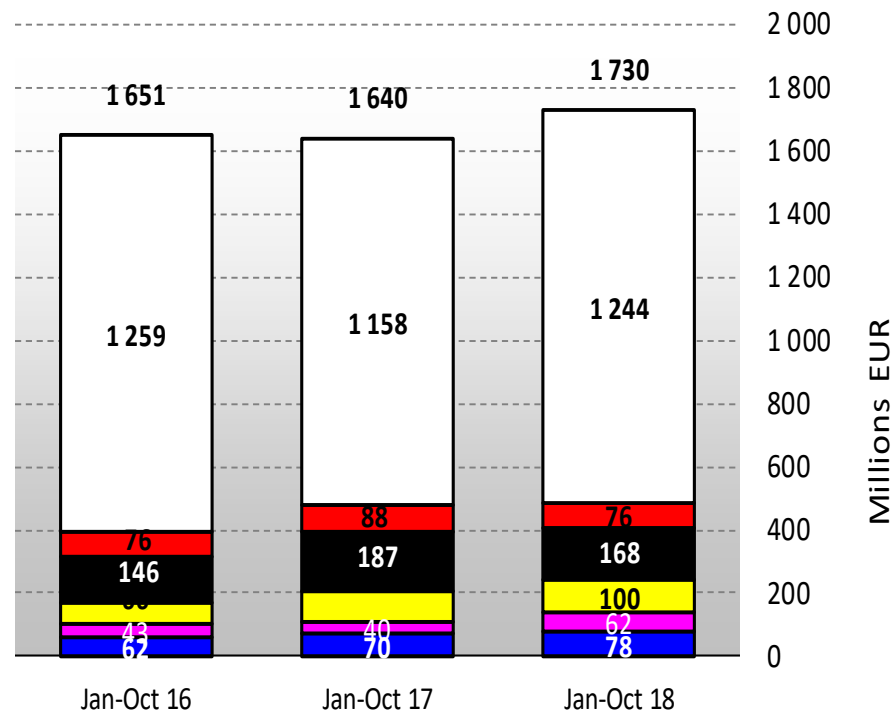
EU Poultry meat Export

EU EXPORTS of Poultry Meat (TONNES cwe)



■ Ukraine ■ Philippines ■ Ghana ■ Hong Kong ■ Benin ■ Other destinations *

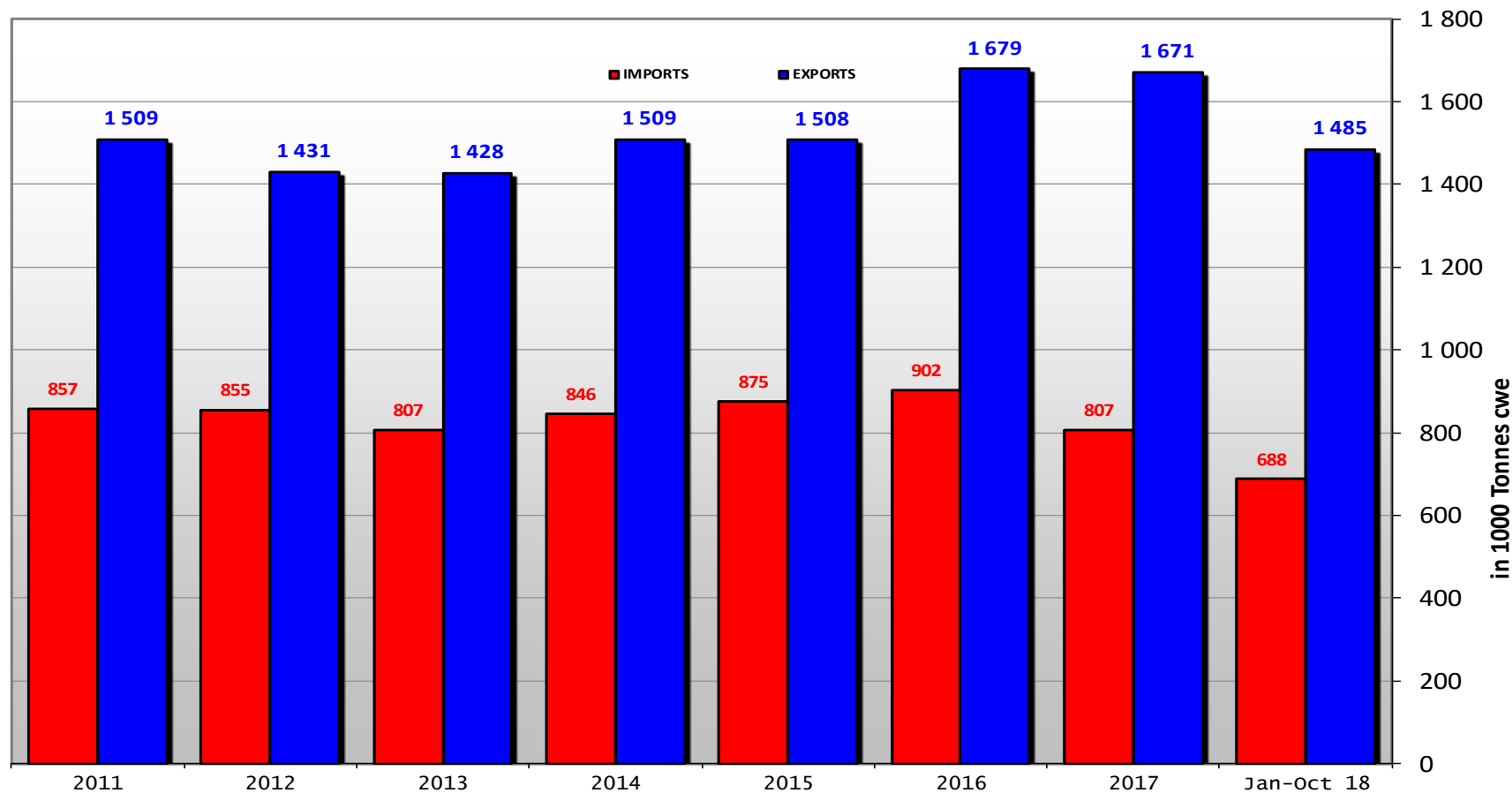
EU EXPORTS of Poultry Meat (Millions EUR)



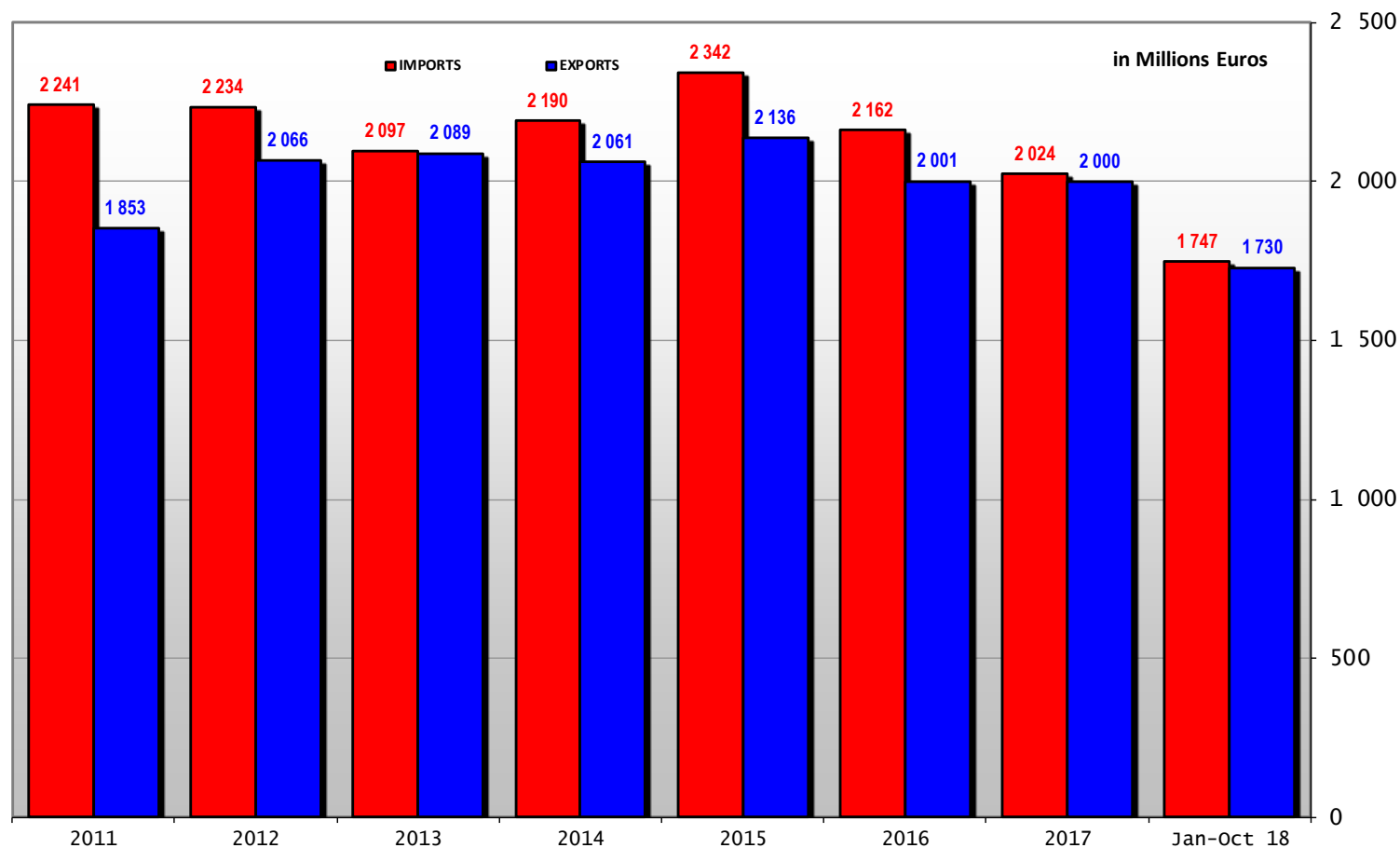
■ Ukraine ■ Philippines ■ Ghana ■ Hong Kong ■ Benin ■ Other destinations *

* countries trading less than 1 730 ('Millions EUR)

EU Poultry meat Trade Balance



EU Poultry meat trade balance (in 1000 euros)



Where to find data:

- http://ec.europa.eu/agriculture/markets/index_en.htm
- Click on link: Poultry
- Click on link: Presentations and prices
(righthand side under: in this chapter)
- Choose the item (link) you want
- Poultry dashboard
- http://ec.europa.eu/agriculture/dashboards/poultry-meat-dashboard_en.pdf