

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

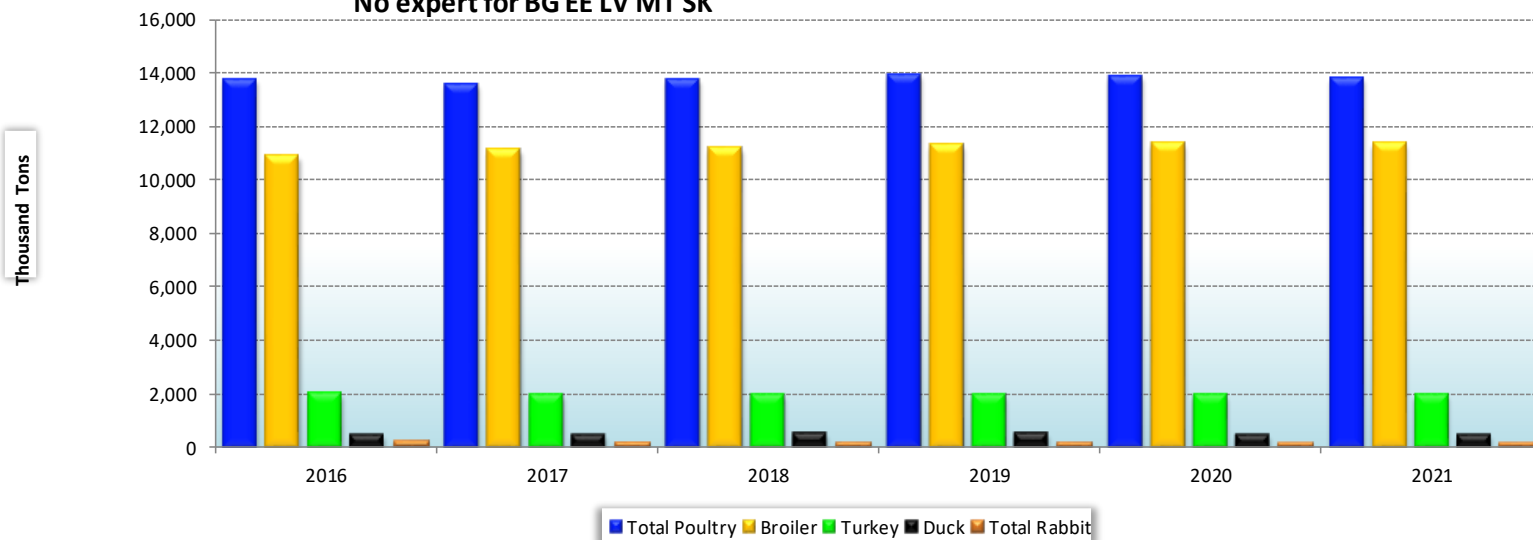
3 November 2020

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



	2016	2017	2018	2019	2020	2021	% 2020/ 2019	% 2021/ 2020
Total Poultry	13,747	13,577	13,718	13,897	13,843	13,810	- 0.4%	- 0.2%
Broiler	10,885	11,106	11,172	11,314	11,333	11,336	+ 0.2%	+ 0.0%
Turkey	1,990	1,937	1,921	1,950	1,936	1,917	- 0.7%	- 1.0%
Duck	477	439	517	515	476	458	- 7.6%	- 3.8%
Total Rabbit	228	210	191	184	171	167	- 7.0%	- 2.4%

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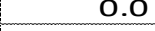








FORECAST

EU production of poultry (expert forecast Autumn 2020)

Source : Experts WG

Qty in Tonnes

% change

	2019	2020	2021	%2020/2019		%2021/2020	
PL	2,706,940	2,648,300	2,611,400		-2.2		-1.4
DE	1,833,500	1,839,000	1,835,000		0.3		-0.2
FR	1,790,400	1,760,300	1,701,500		-1.7		-3.3
ES	1,391,600	1,389,500	1,408,700		-0.2		1.4
IT	1,324,000	1,362,000	1,359,000		2.9		-0.2
NL	1,119,000	1,119,000	1,119,000		0.0		0.0
HU	687,980	664,086	694,000		-3.5		4.5
RO	430,000	435,000	445,000		1.2		2.3
BE	416,800	420,400	420,400		0.9		0.0
PT	348,300	343,800	346,500		-1.3		0.8
IE	238,500	242,000	238,500		1.5		-1.4
SE	227,140	231,900	236,000		2.1		1.8
CZ	195,500	196,500	196,500		0.5		0.0
EL	192,000	192,000	192,000		0.0		0.0
DK	168,500	166,500	166,500		-1.2		0.0
FI	140,100	143,400	146,500		2.4		2.2
AT	134,063	135,130	137,200		0.8		1.5
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	84,500	84,500	84,500		0.0		0.0
SI	71,370	74,740	74,740		4.7		0.0
CY	26,900	24,690	26,700		-8.2		8.1
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	13,897,093	13,842,746	13,809,640		-0.4		-0.2

3 November 2020






























FORECAST

EU production of broiler (expert forecast Autumn 2020)

Source : Experts WG

Qty in Tonnes

% change

	2019	2020	2021	%2020/2019		%2021/2020	
PL	2,207,000	2,180,000	2,150,000		-1.2		-1.4
DE	1,412,000	1,427,000	1,427,000		1.1		0.0
ES	1,151,000	1,147,000	1,165,000		-0.3		1.6
FR	1,187,700	1,176,400	1,167,000		-1.0		-0.8
NL	1,100,000	1,100,000	1,100,000		0.0		0.0
IT	1,015,000	1,030,000	1,032,000		1.5		0.2
HU	436,220	453,941	460,000		4.1		1.3
RO	415,000	420,000	430,000		1.2		2.4
BE	409,000	412,500	412,500		0.9		0.0
PT	294,000	289,000	291,000		-1.7		0.7
SE	222,340	227,000	231,000		2.1		1.8
IE	205,000	206,000	201,000		0.5		-2.4
EL	185,000	185,000	185,000		0.0		0.0
CZ	174,000	175,000	175,000		0.6		0.0
DK	167,000	165,000	165,000		-1.2		0.0
FI	132,000	135,000	138,000		2.3		2.2
LT	130,000	130,000	130,000		0.0		0.0
AT	116,560	117,000	118,000		0.4		0.9
SK	80,100	80,100	80,100		0.0		0.0
BG	75,000	75,000	75,000		0.0		0.0
HR	70,000	70,000	70,000		0.0		0.0
SI	65,350	69,000	69,000		5.6		0.0
CY	26,700	24,500	26,500		-8.2		8.2
LV	17,000	17,000	17,000		0.0		0.0
EE	13,780	13,780	13,780		0.0		0.0
MT	7,400	7,400	7,400		0.0		0.0
EU	11,314,150	11,332,621	11,336,280		0.2		0.0

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FORECAST

EU production of turkey (expert forecast Autumn 2020)

Source : Experts WG

Qty in Tonnes

% change

	2019	2020	2021	%2020/2019	%2021/2020
PL	408,000	380,000	375,000	-6.9	-1.3
DE	377,700	372,000	368,000	-1.5	-1.1
FR	338,900	327,000	317,000	-3.5	-3.1
IT	301,000	325,000	320,000	8.0	-1.5
ES	236,000	238,000	239,000	0.8	0.4
HU	95,990	97,919	99,000	2.0	1.1
PT	43,700	44,800	45,500	2.5	1.6
IE	29,000	31,000	32,000	6.9	3.2
NL	28,000	28,000	28,000	0.0	0.0
AT	16,440	17,000	18,000	3.4	5.9
RO	15,000	15,000	15,000	0.0	0.0
HR	14,000	14,000	14,000	0.0	0.0
CZ	10,000	10,000	10,000	0.0	0.0
FI	8,100	8,400	8,500	3.7	1.2
BE	7,800	7,900	7,900	1.3	0.0
SI	6,020	5,740	5,740	-4.7	0.0
LT	5,500	5,500	5,500	0.0	0.0
SE	4,800	4,900	5,000	2.1	2.0
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	190	200	-5.0	5.3
BG	100	100	100	0.0	0.0
LV					
EE					
MT					
EU	1,950,250	1,936,449	1,917,440	-0.7	-1.0

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FORECAST

EU production of duck (expert forecast Autumn 2020)

Source : Experts WG

Qty in Tonnes

% change

	2019	2020	2021	%2020/2019		%2021/2020	
FR	226,300	220,700	186,000	-2.5		-15.7	
HU	118,390	88,516	104,000	-25.2		17.5	
PL	52,200	52,500	53,000	0.6		1.0	
DE	39,100	35,500	35,500	-9.2		0.0	
BG	22,000	22,000	22,000	0.0		0.0	
NL	19,000	19,000	19,000	0.0		0.0	
CZ	11,000	11,000	11,000	0.0		0.0	
PT	10,600	10,000	10,000	-5.7		0.0	
IE	4,500	5,000	5,500	11.1		10.0	
IT	4,000	4,000	4,000	0.0		0.0	
ES	4,600	4,500	4,700	-2.2		4.4	
DK	1,500	1,500	1,500	0.0		0.0	
SK	600	600	600	0.0		0.0	
HR	500	500	500	0.0		0.0	
AT	517	550	600	6.4		9.1	
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	514,912	475,971	458,005	-7.6		-3.8	

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






















FORECAST

EU production of rabbit (expert forecast Autumn 2020)

Source : Experts WG

Qty in Tonnes

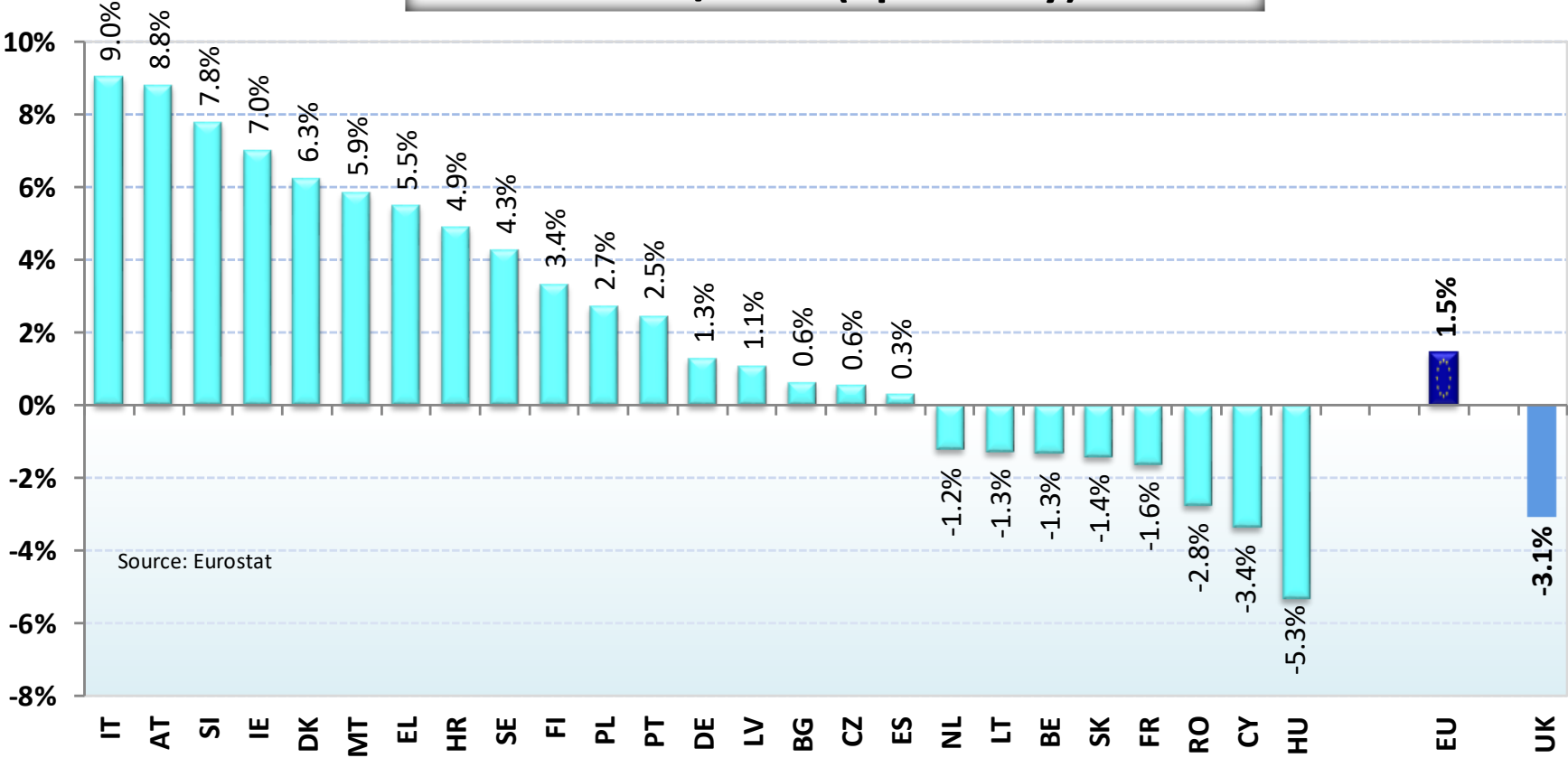
% change

	2019	2020	2021	%2020/2019		%2021/2020	
ES	53,000	51,000	51,000		-3.8		0.0
FR	50,000	41,300	37,900		-17.4		-8.2
IT	33,000	31,000	30,000		-6.1		-3.2
PL	24,000	24,000	24,000		0.0		0.0
CZ	9,100	9,100	9,100		0.0		0.0
PT	5,700	5,500	5,700		-3.5		3.6
EL	5,000	5,000	5,000		0.0		0.0
SK	3,600	3,600	3,600		0.0		0.0
CY	440	400	440		-9.1		10.0
BE	250	250	250		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							
DE							
HU							
SE							
RO							
FI							
HR							
LV							
EE							
SI							
EU	184,092	171,152	166,992		-7.0		-2.4

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PRODUCTION

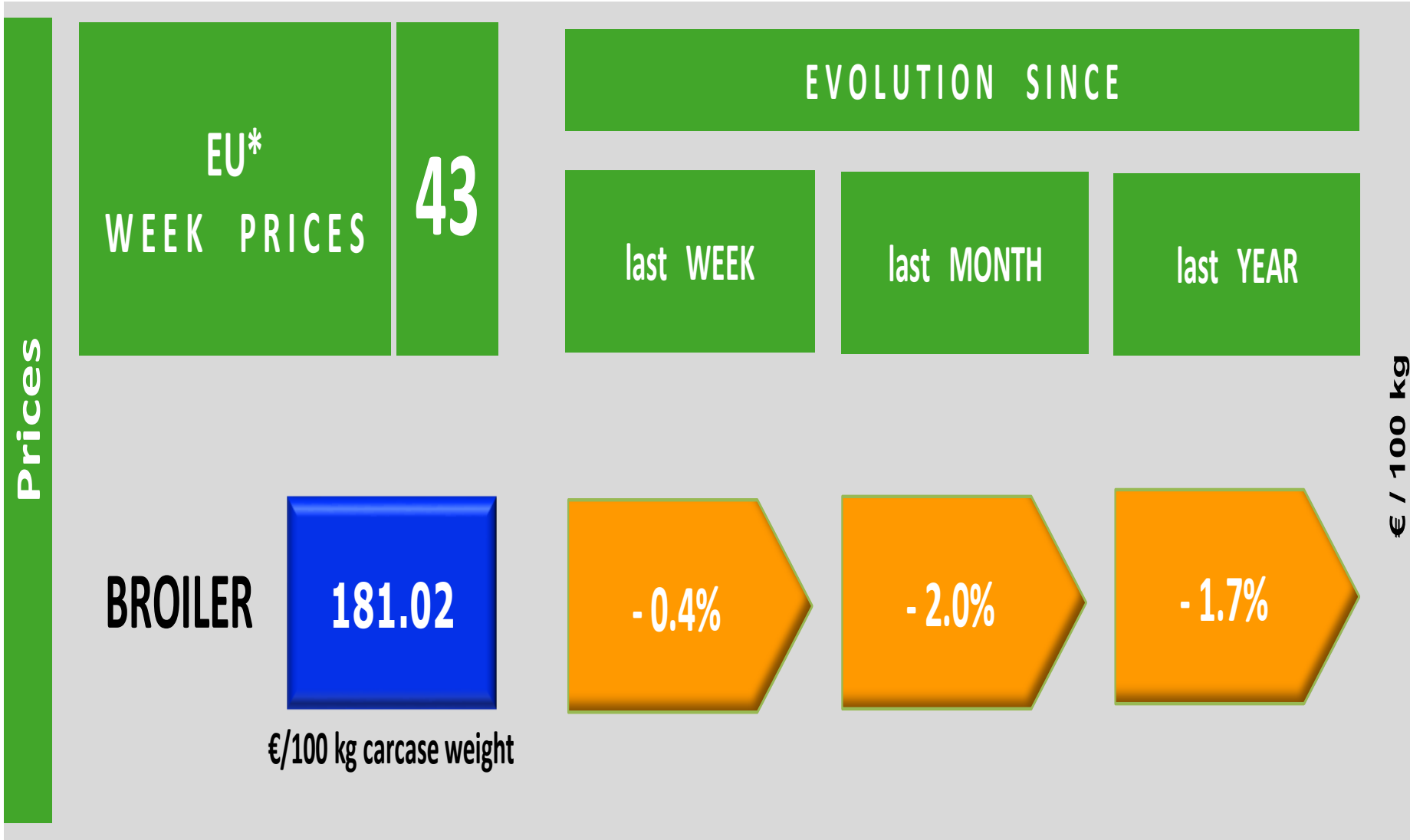
Change in Poultry Meat Production in %
2020/2019 (up to July)



Source: Eurostat

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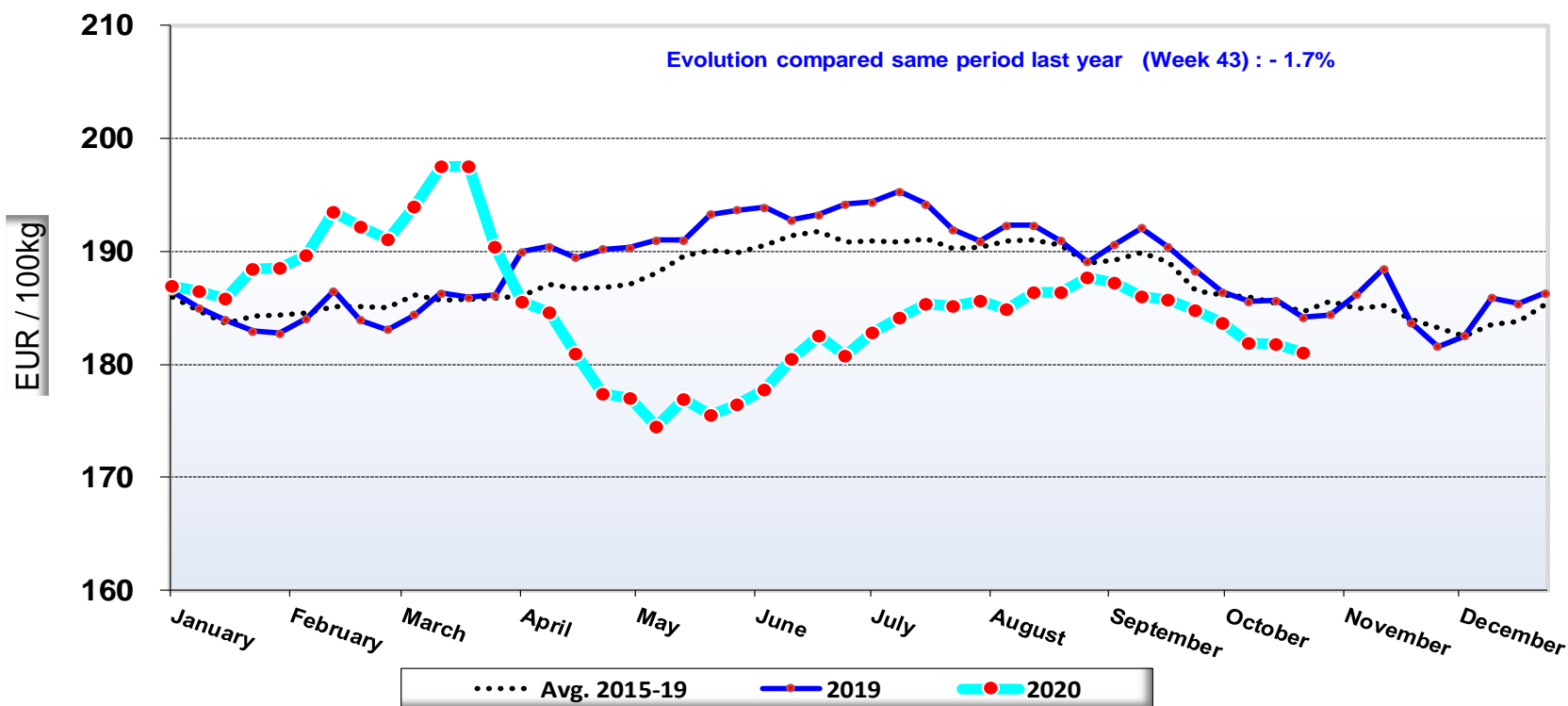
PRICES



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Evolution of the weekly EU* average price for Broiler

Latest price ==> 181.02 EUR/100 kg

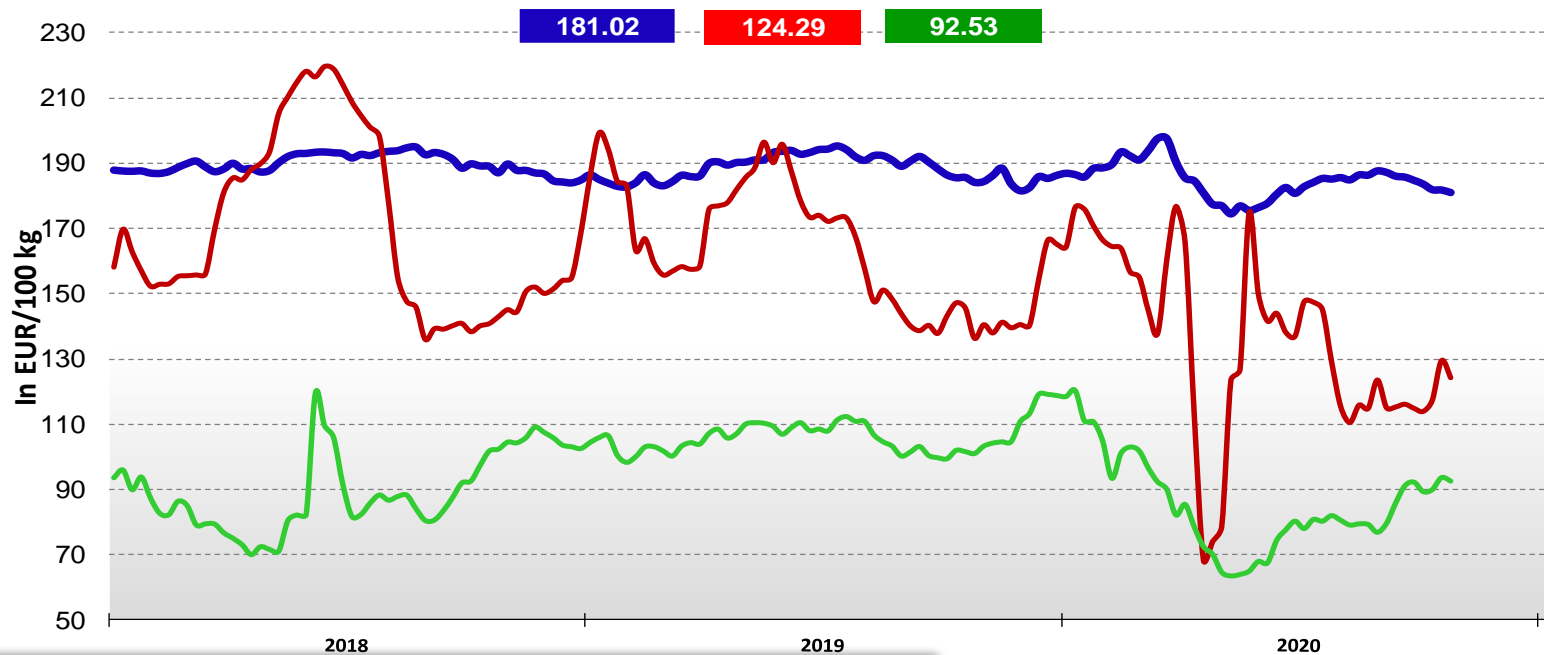


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

* EU without UK

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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

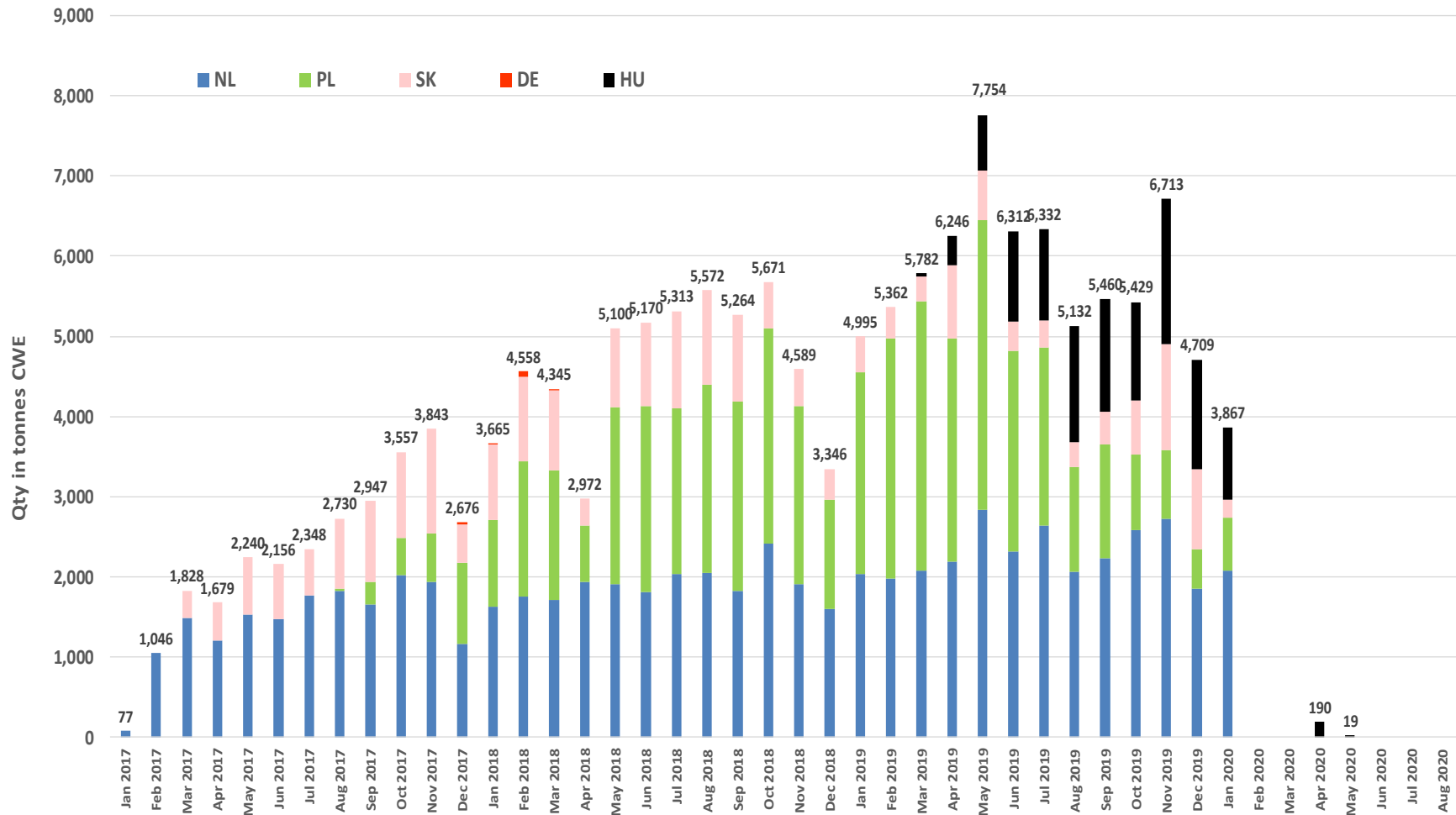
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Imports of Poultry meat from selected origins

	2016		2017		2018		2019		Jan-Aug 20		Compared to Jan-Aug 19
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	399,968	61.0%	318,421	55.4%	232,212	40.1%	235,521	39.6%	148,897	42.7%	- 10.4%
Thailand	168,015	25.6%	140,474	24.5%	173,177	29.9%	172,747	29.1%	96,768	27.8%	- 22.1%
Ukraine	48,026	7.3%	80,128	14.0%	123,411	21.3%	133,819	22.5%	69,692	20.0%	- 21.6%
Chile	16,979	2.6%	9,165	1.6%	21,156	3.7%	19,610	3.3%	14,350	4.1%	+ 0.2%
China	12,994	2.0%	14,674	2.6%	17,060	2.9%	21,878	3.7%	11,455	3.3%	- 22.7%
Argentina	2,856	0.4%	3,118	0.5%	3,990	0.7%	4,071	0.7%	2,381	0.7%	- 5.0%
Switzerland	2,548	0.4%	2,736	0.5%	2,901	0.5%	2,554	0.4%	1,643	0.5%	- 4.5%
Other Destinations	3,786	0.6%	5,613	1.0%	4,810	0.8%	4,171	0.7%	3,257	0.9%	
Total (without UK)	655,172		574,330		578,717		594,370		348,444		
% change			- 12%		+ 1%		+ 3%		- 16.1%		
United Kingdom	322,234		338,970		325,183		339,757		177,578	up to Jul 20	

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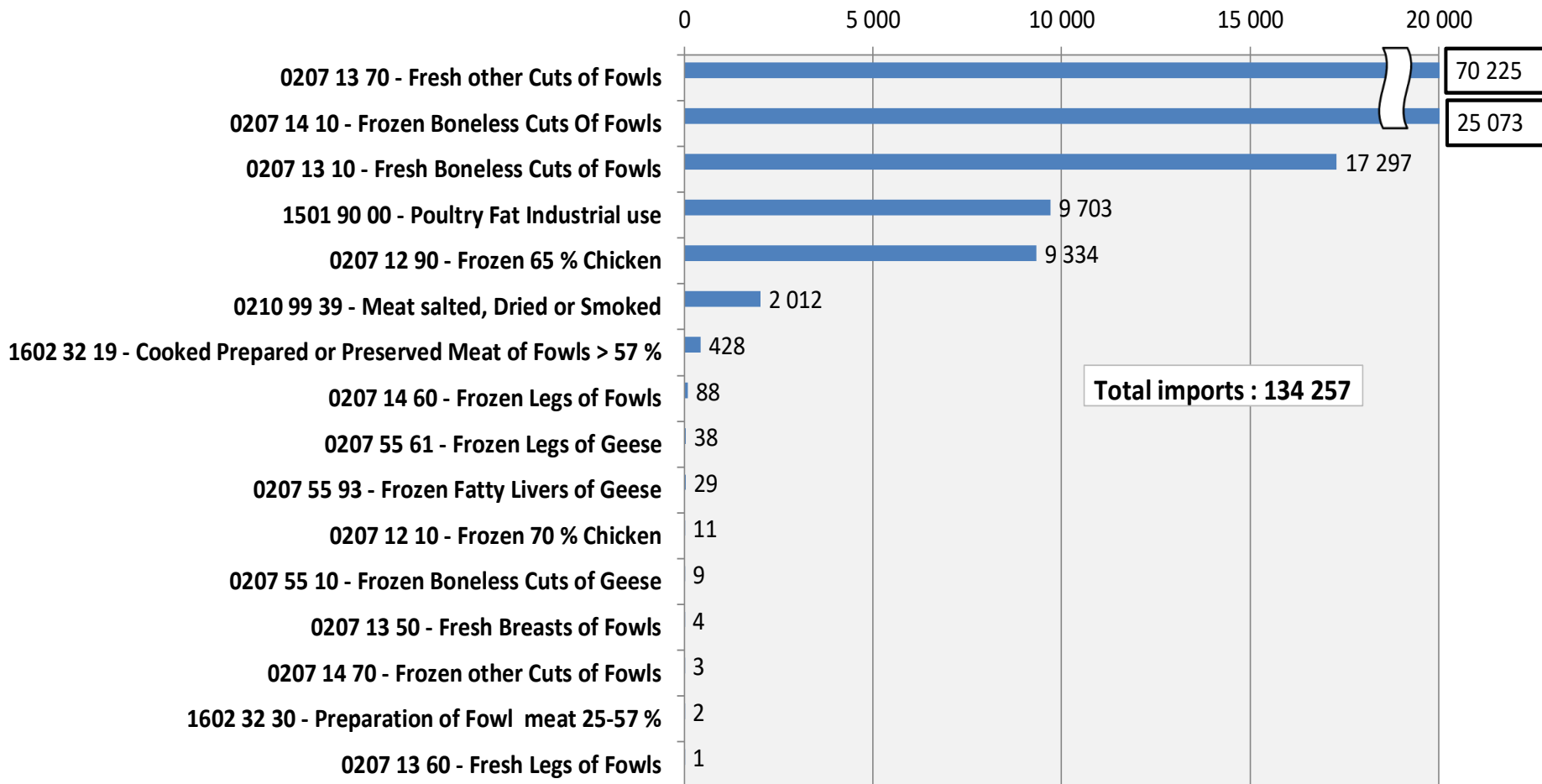
Monthly imports from Ukraine under CN 2071370



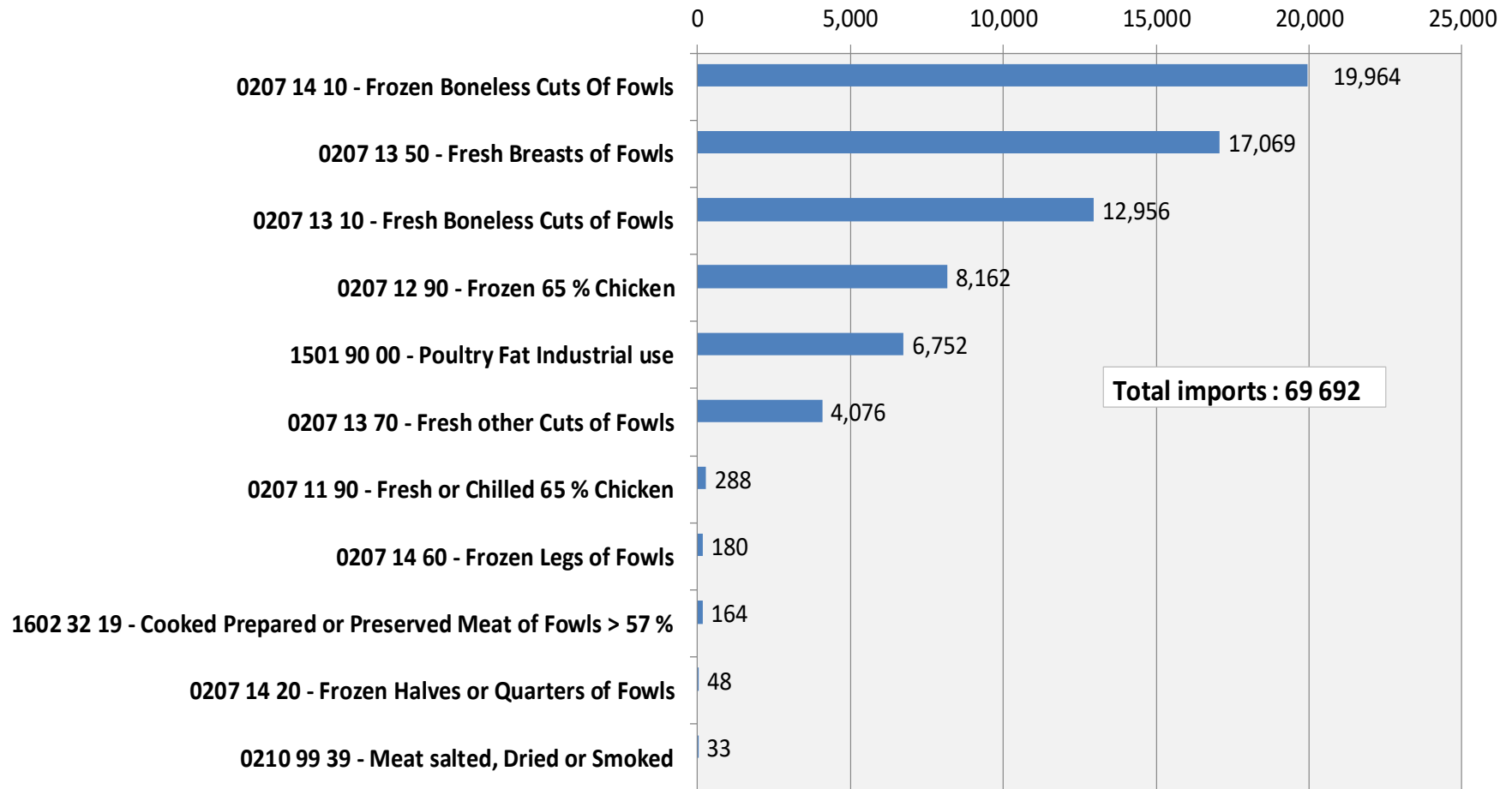
Source: Comext

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

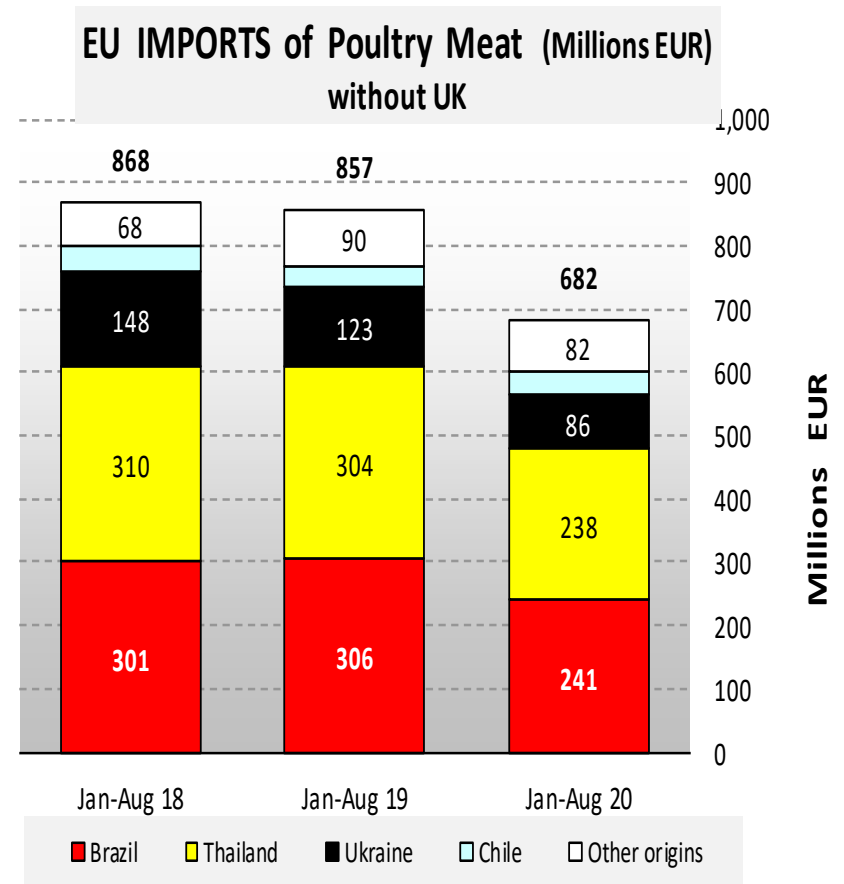
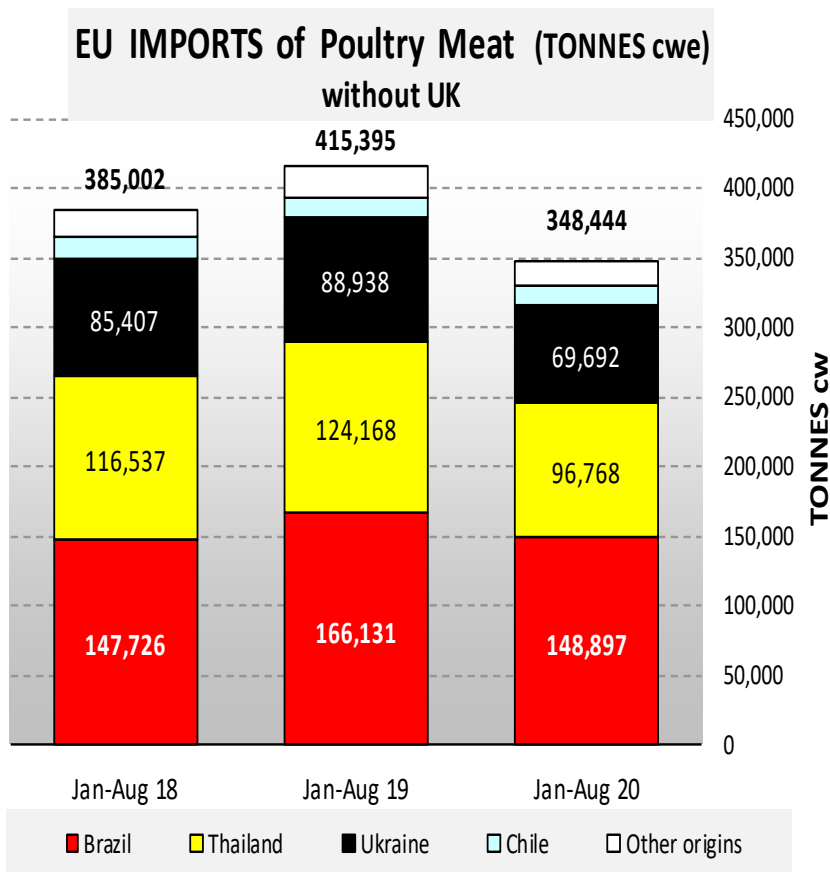


EU Imports of poultry meat from Ukraine in Jan-Aug20 (in tonnes CWE)



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EU poultry meat imports (by origin)



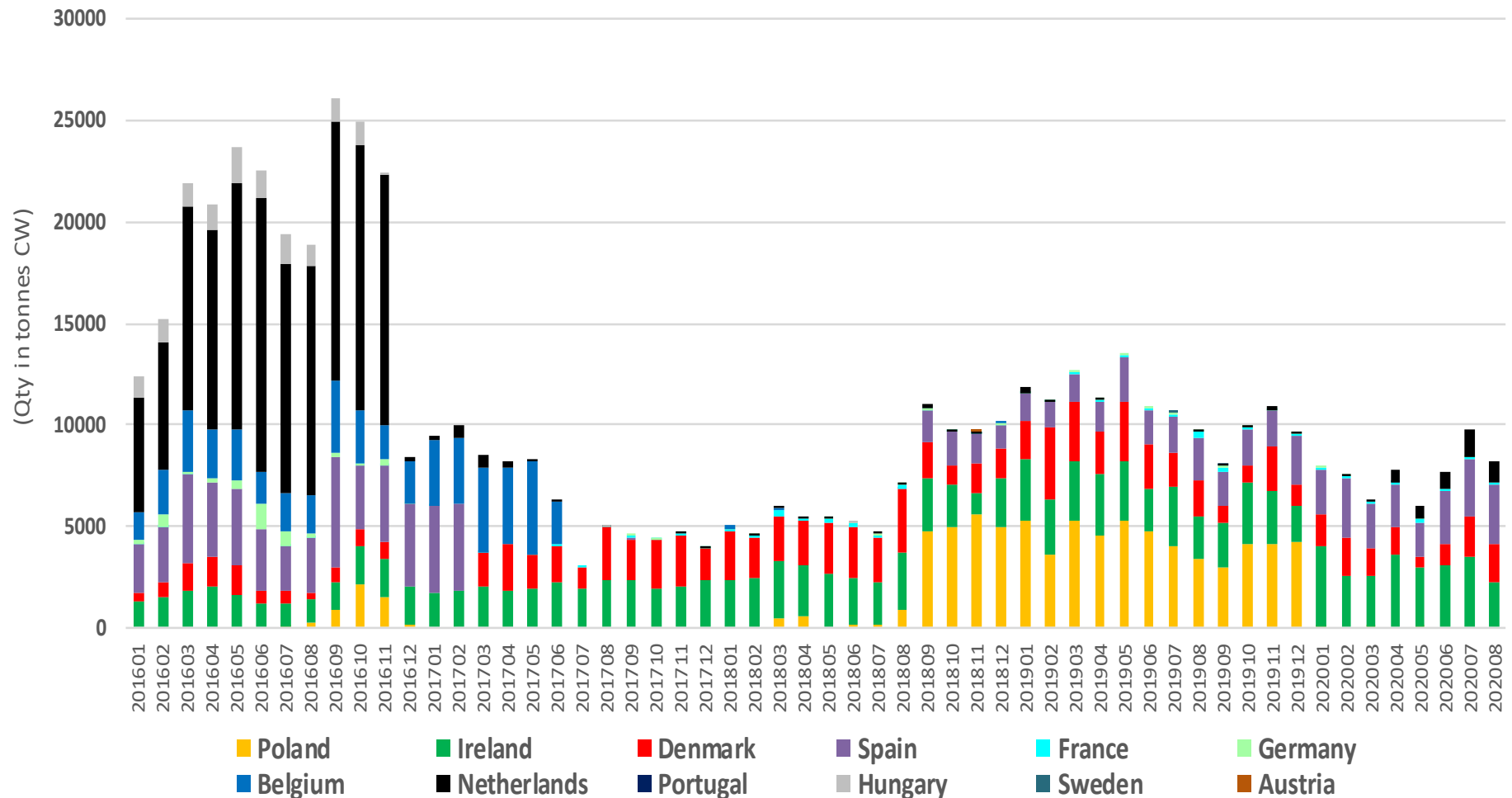
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Exports of Poultry Meat to Selected Destinations

	2016		2017		2018		2019		Jan-Aug 20		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Aug 19
Philippines	120,840	7.7%	125,345	7.9%	159,845	9.5%	215,614	12.1%	142,831	12.7%	+ 4.6%
Ghana	113,425	7.2%	143,900	9.1%	163,302	9.7%	184,299	10.3%	134,190	12.0%	+ 9.5%
Ukraine	114,012	7.2%	160,818	10.1%	177,036	10.6%	178,206	10.0%	90,518	8.1%	- 19.4%
Congo (Dem. Rep.)	45,943	2.9%	58,336	3.7%	74,952	4.5%	78,807	4.4%	68,905	6.1%	+ 44.2%
Hong Kong	105,607	6.7%	121,063	7.6%	111,926	6.7%	93,837	5.3%	63,084	5.6%	+ 0.6%
South Africa	236,831	15.0%	76,314	4.8%	84,004	5.0%	130,054	7.3%	61,122	5.4%	- 33.3%
Saudi Arabia	121,463	7.7%	98,715	6.2%	82,481	4.9%	67,159	3.8%	46,347	4.1%	- 0.1%
Vietnam	31,623	2.0%	49,441	3.1%	79,965	4.8%	83,509	4.7%	37,046	3.3%	- 37.8%
Benin	118,575	7.5%	103,561	6.5%	90,595	5.4%	68,936	3.9%	36,303	3.2%	- 37.7%
Cuba	7,409	0.5%	3,379	0.2%	8,662	0.5%	36,934	2.1%	35,361	3.1%	+ 81.0%
Other Destinations	558,334	35.5%	644,546	40.7%	644,770	38.4%	649,725	36.4%	407,124	36.3%	
Total (without UK)	1,574,062		1,585,417		1,677,537		1,787,080		1,122,832		
% change			+ 1%		+ 6%		+ 7%		- 5.2%		
United Kingdom	801,035	33.7%	825,967	34.3%	865,047	34.0%	889,556	33.2%	450,132	up to Jul 20	

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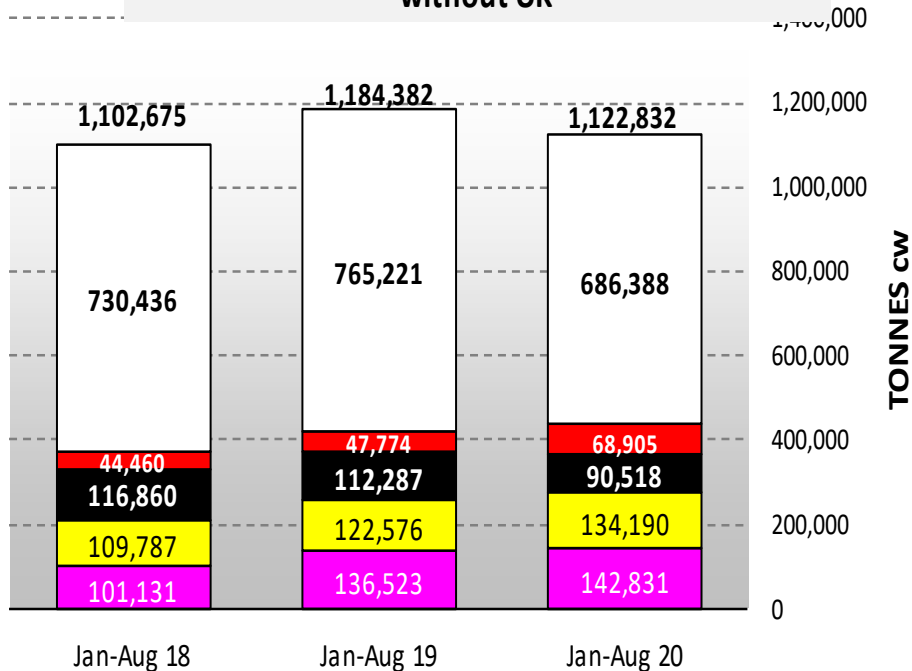
EU27 EXPORTS OF POULTRY MEAT & POULTRY MEAT PRODUCTS TO SOUTH AFRICA



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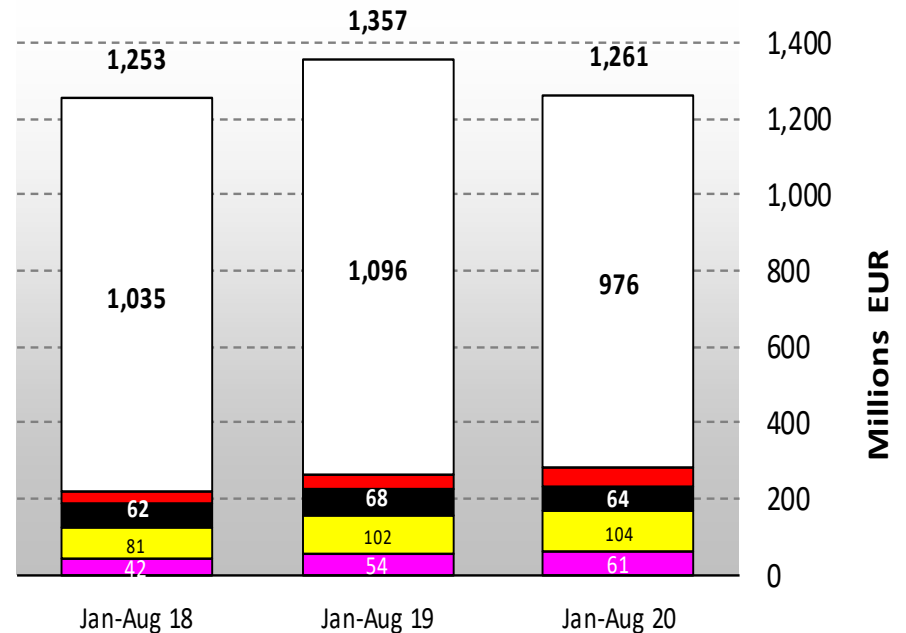
EU poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)
without UK



■ Philippines ■ Ghana ■ Ukraine ■ Congo (Dem. Rep.) □ Other destinations *

EU EXPORTS of Poultry Meat (Millions EUR)
without UK



■ Philippines ■ Ghana ■ Ukraine ■ Congo (Dem. Rep.) □ Other destinations *

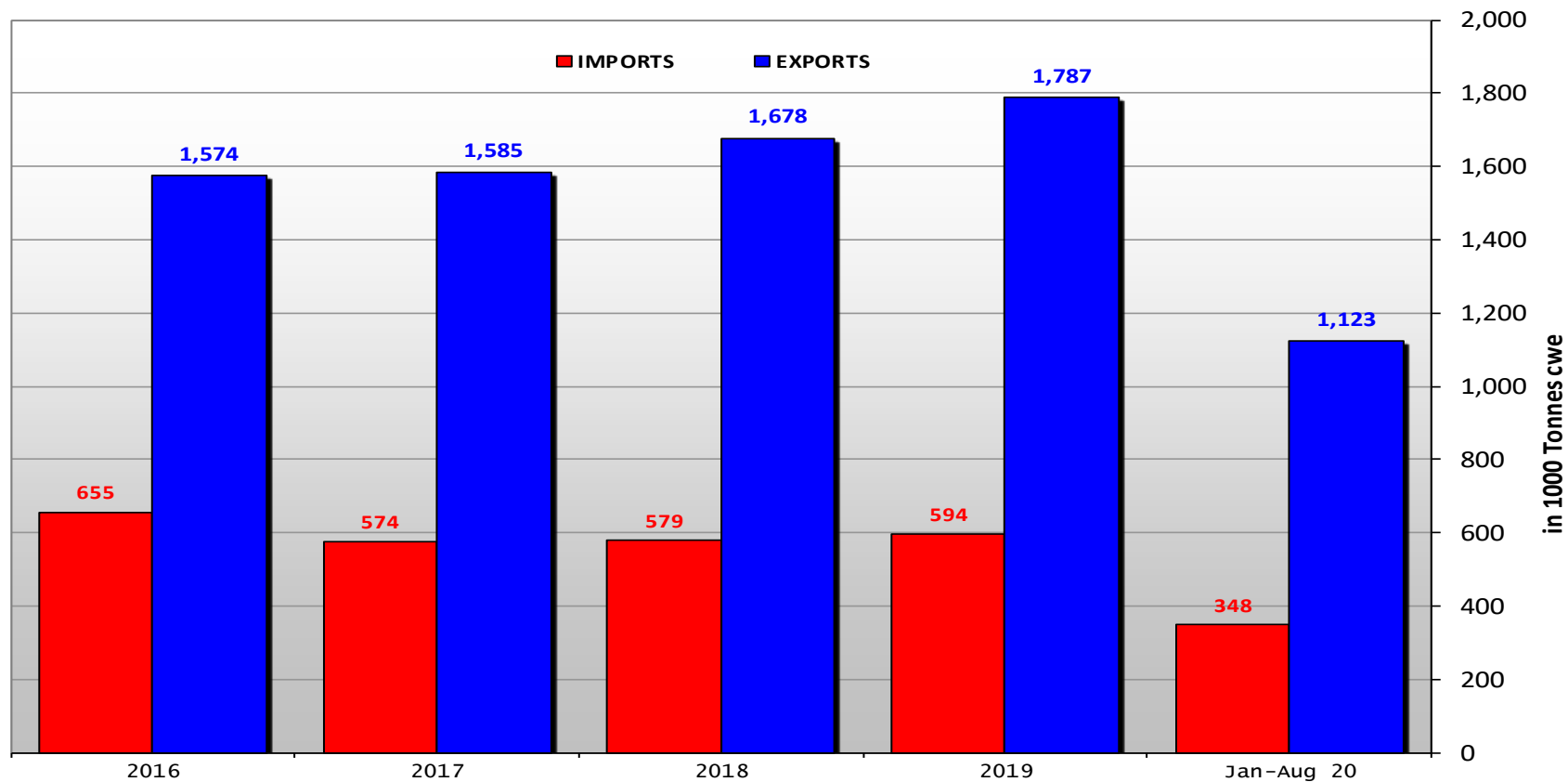
* countries trading less than 64 ('Millions EUR)

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TRADE

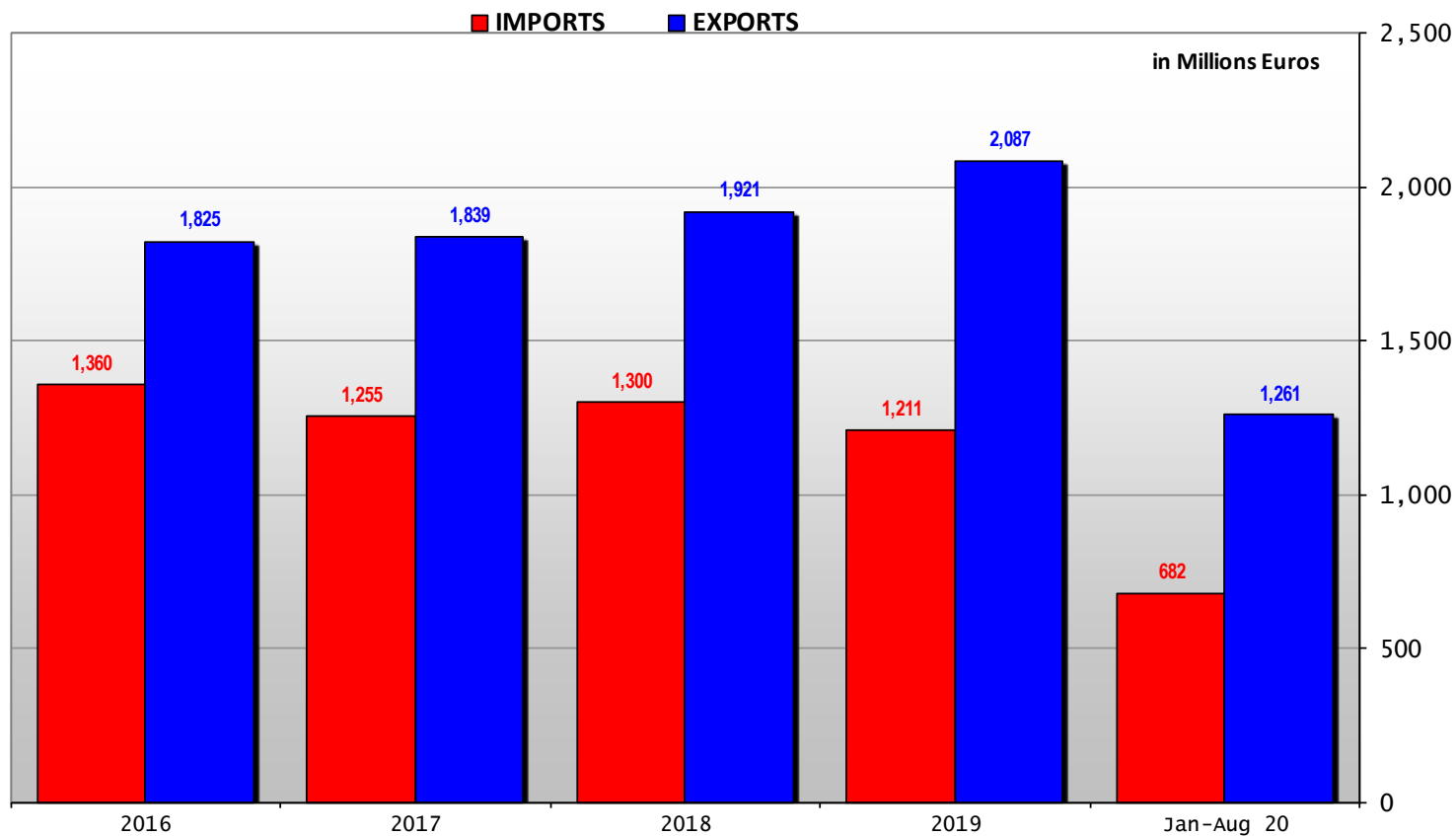
BALANCE

EU Poultry meat Trade Balance



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EU Poultry meat trade balance (in 1000 euros)



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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
- **Poultry and eggs data portal:**
- <https://agridata.ec.europa.eu/extensions/DataPortal/eggs-and-poultry.html>