

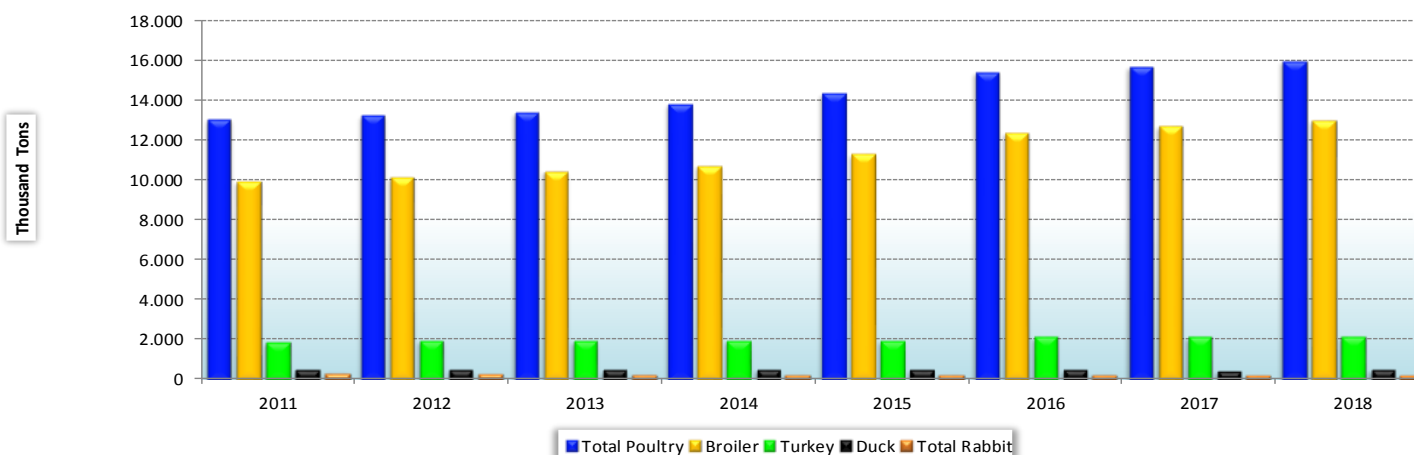
EU Market Situation for Poultry

**Forecast Working
Group on Poultry &
eggs
13 November 2017**



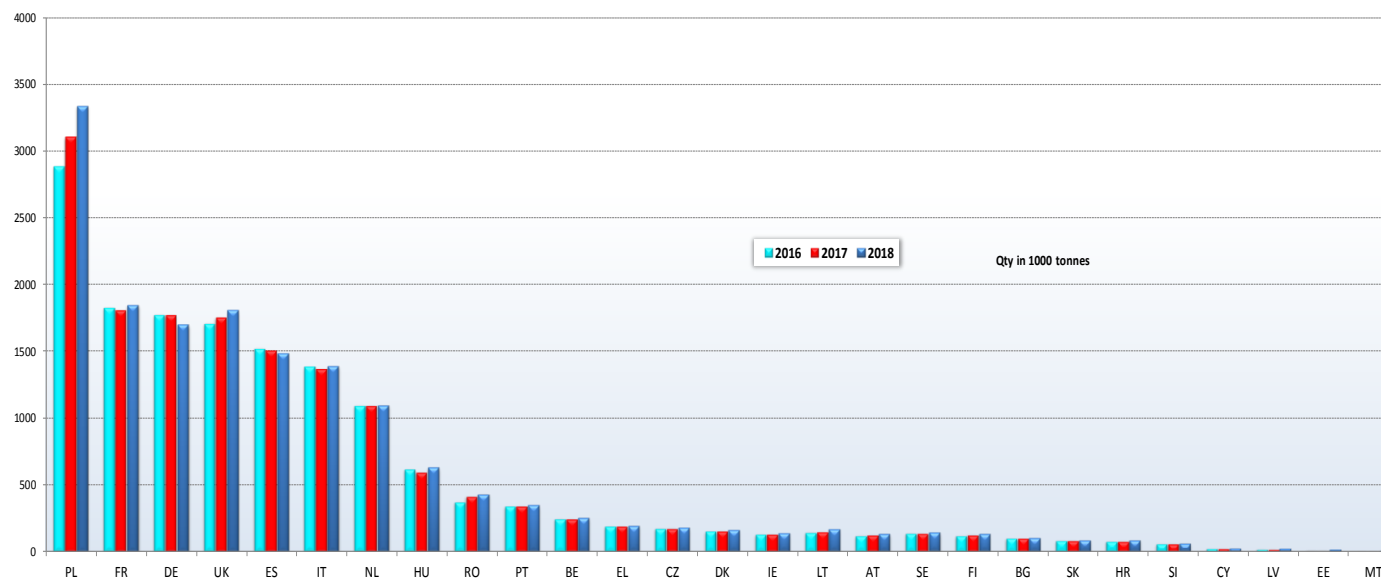
Experts EU production forecast on Poultry and Rabbit

(Missing or incomplete data (BE-EL-CY-SI-SE) - No expert (BG-EE-LV-MT-SK))



	2010	2011	2012	2013	2014	2015	2016	2017	2018	% 2017/2016	% 2018/2017
Total Poultry	12.945	13.035	13.220	13.367	13.797	14.325	15.393	15.665	15.961	+ 1,8%	+ 1,9%
Broiler	9.876	9.932	10.173	10.445	10.729	11.295	12.346	12.689	12.981	+ 2,8%	+ 2,3%
Turkey	1.976	1.878	1.967	1.935	1.964	1.967	2.141	2.134	2.145	- 0,3%	+ 0,5%
Duck	481	500	500	485	512	503	507	456	511	- 10,1%	+ 12,1%
Total Rabbit	329	328	281	260	246	243	228	212	200	- 7,1%	- 5,4%

Experts EU production forecast of Poultry Meat



Poland's data is the average of data reported by Industry and Copra

Plains data is the average of data reported by industry and Cuyler																												
	PL	FR	DE	UK	ES	IT	NL	HU	RO	PT	BE	EL	CZ	DK	IE	LT	AT	SE	FI	BG	SK	HR	SI	CY	LV	EE	MT	EU
2017	3 110	1 813	1 775	1 759	1 511	1 372	1 097	599	417	345	250	192	178	159	134	150	129	141	131	102	86	83	65	25	21	15	6	15 665
17/16	+ 7.7%	- 1.0%	- 0.0%	+ 2.8%	- 1.0%	- 1.2%	+ 0.0%	- 3.5%	+ 11.2%	+ 0.9%	+ 0.0%	+ 0.0%	+ 0.6%	+ 1.9%	+ 1.7%	+ 1.4%	+ 4.5%	+ 0.0%	+ 7.8%	+ 0.0%	+ 0.0%	+ 2.2%	+ 6.6%	+ 3.3%	+ 0.0%	+ 0.0%	+ 1.8%	
2018	3 338	1 848	1 700	1 807	1 483	1 390	1 095	631	429	348	250	192	178	161	137	165	134	141	134	102	86	86	61	24	21	15	6	15 961
18/17	+ 7.3%	+ 1.9%	- 4.2%	+ 2.7%	- 1.9%	+ 1.3%	- 0.2%	+ 5.3%	+ 2.9%	+ 0.9%	+ 0.0%	+ 0.0%	+ 0.0%	+ 1.3%	+ 2.1%	+ 10.0%	+ 4.1%	+ 0.0%	+ 2.5%	+ 0.0%	+ 0.0%	+ 3.0%	- 6.2%	- 3.2%	+ 0.0%	+ 0.0%	+ 1.9%	

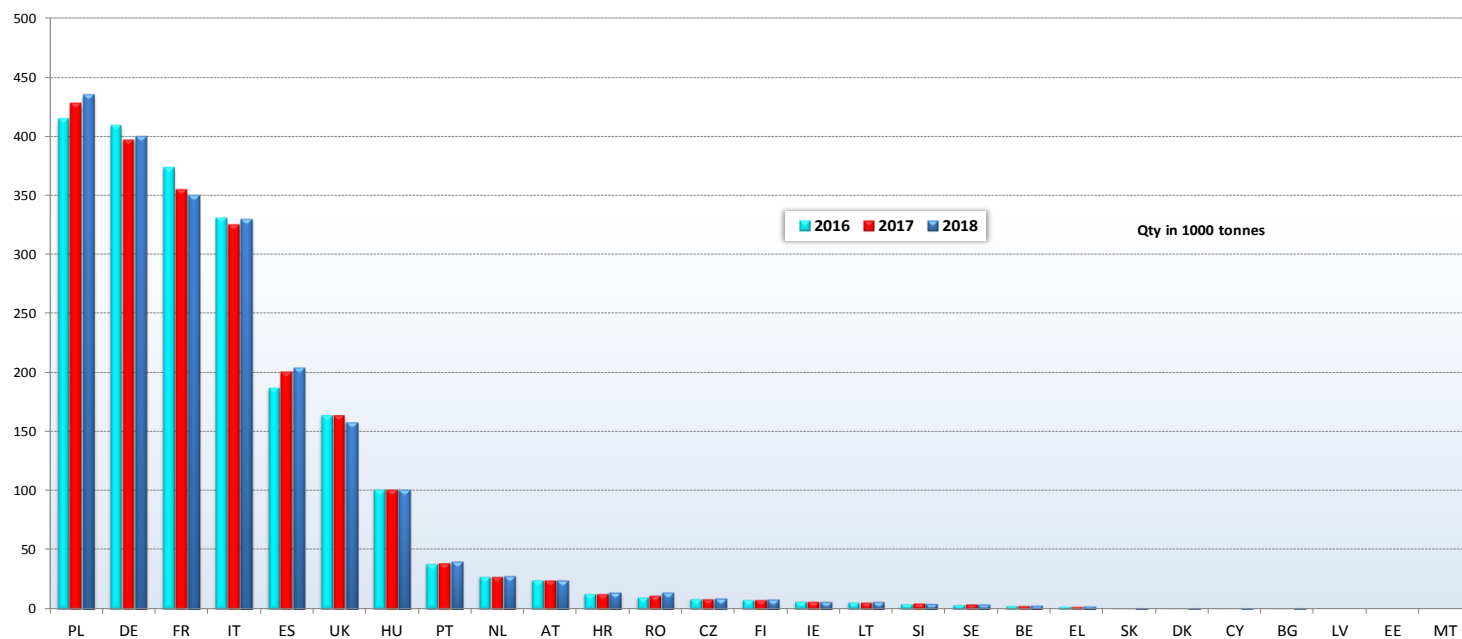
Experts EU production forecast of Broiler Meat



Poland's data is the average of data reported by Industry and Copia

	PL	UK	DE	ES	FR	NL	IT	HU	RO	PT	BE	EL	DK	CZ	IE	SE	FI	AT	SK	BG	HR	LT	SI	CY	LV	EE	MT	EU
2017	2 560	1 566	1 298	1 237	1 156	1 081	975	402	405	281	246	185	158	160	122	151	123	112	80	75	69	125	60	25	17	14	7	12 689
17/16	+9.2%	+3.2%	+1.0%	-2.5%	+1.9%	+0.0%	-0.6%	+1.9%	+11.0%	+1.1%	+0.0%	+0.0%	+1.9%	+0.6%	+1.7%	+10.1%	+8.4%	+4.0%	+0.0%	+0.0%	+2.4%	-5.3%	+6.2%	+2.1%	+0.0%	+0.0%	+0.0%	+2.8%
2018	2 765	1 621	1 300	1 212	1 160	1 080	985	410	415	283	246	185	160	160	124	151	126	116	80	75	70	135	60	25	17	14	7	12 981
18/17	+8.0%	+3.5%	+0.2%	-2.0%	+0.3%	-0.1%	+1.0%	+1.9%	+2.5%	+0.7%	+0.0%	+0.0%	+1.3%	+0.0%	+1.6%	+0.0%	+2.4%	+4.0%	+0.0%	+0.0%	+2.0%	+8.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+2.3%

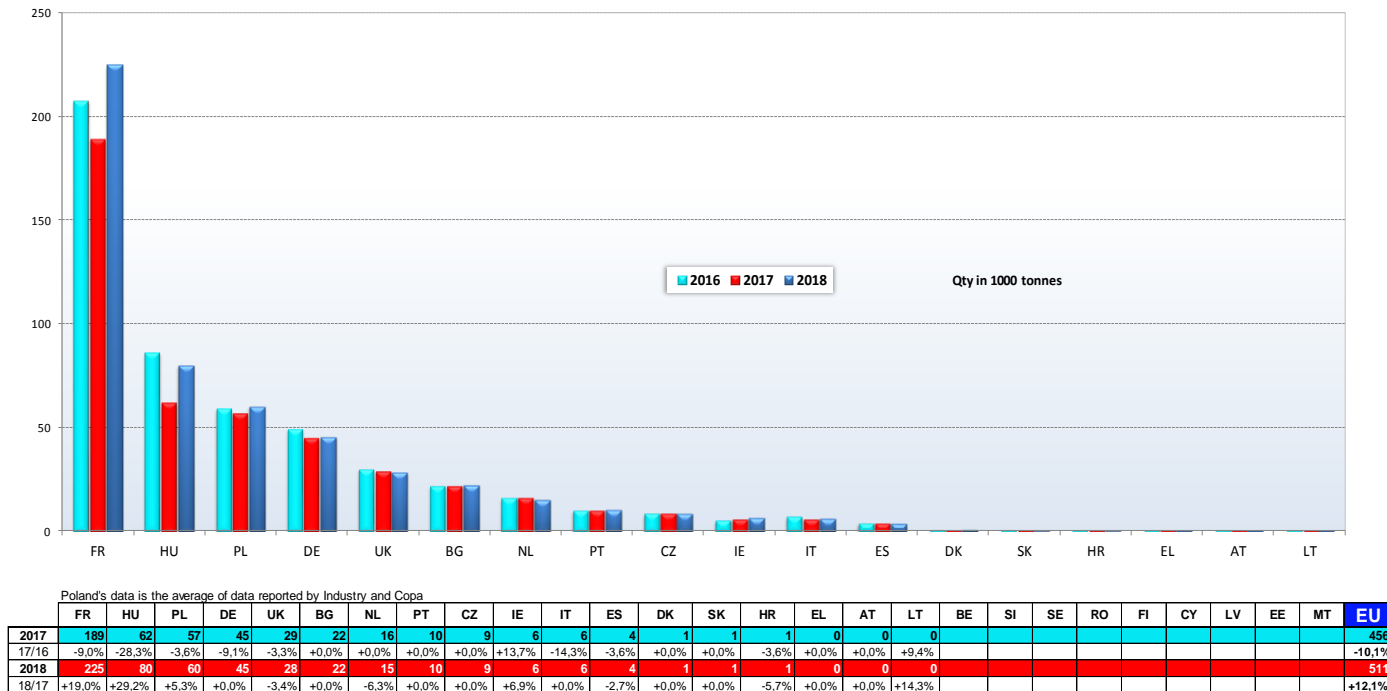
Experts EU production forecast of Turkey Meat



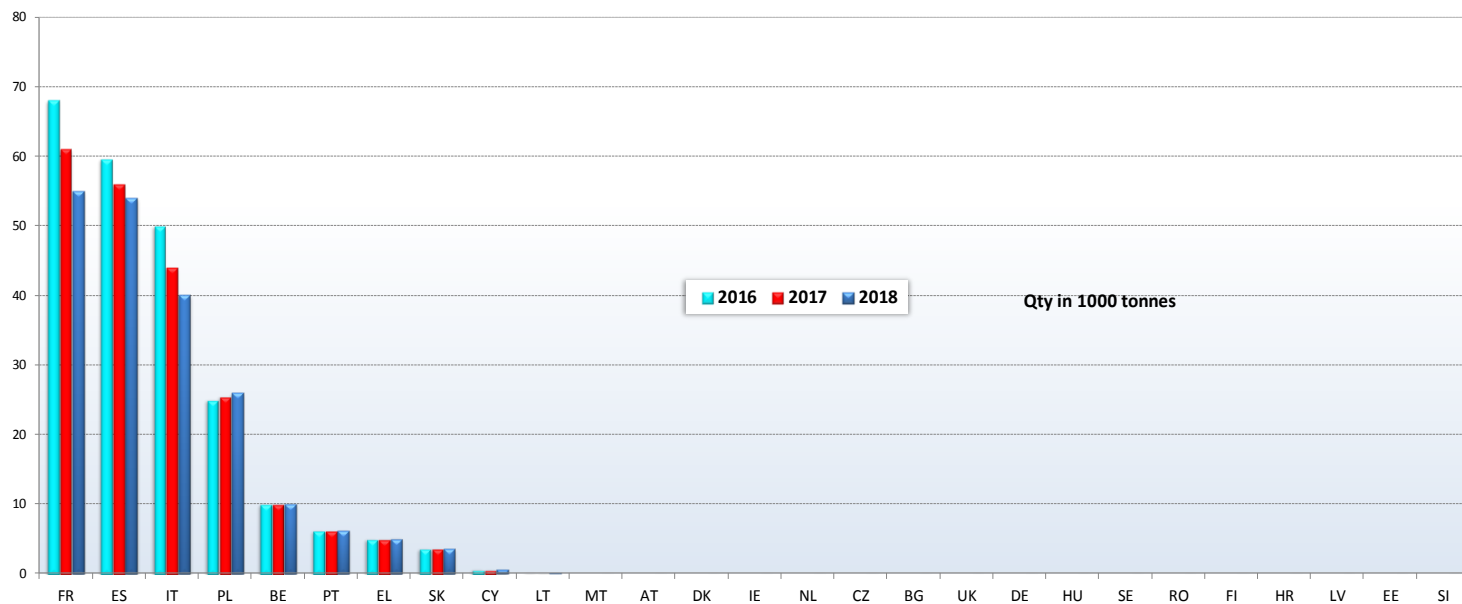
Poland's data is the average of data reported by Industry and Copia

Pl and s data is the average of data reported by industry and Copra																												
	PL	DE	FR	IT	ES	UK	HU	PT	NL	AT	HR	RO	CZ	FI	IE	LT	SI	SE	BE	EL	SK	DK	CY	BG	LV	EE	MT	EU
2017	428	397	355	325	201	164	101	39	28	25	13	12	9	8	7	6	5	4	3	3	1	0	0	0				2 134
17/16	+3.0%	-2.9%	-4.9%	-1.8%	+7.5%	+0.0%	-0.2%	+1.3%	+0.0%	+0.0%	+1.5%	+20.0%	+0.0%	+0.0%	-7.1%	+1.7%	+11.1%	+4.9%	+0.0%	+0.0%	+0.0%	-40.0%	+0.0%	+0.0%				-0.3%
2018	435	400	350	330	204	158	101	40	28	25	14	14	9	8	7	7	5	4	3	3	1	0	0	0				2 145
18/17	+1.8%	+0.8%	-1.4%	+1.5%	+1.5%	-3.7%	+0.0%	+2.0%	+0.0%	+0.0%	+4.5%	+16.7%	+0.0%	+3.8%	+0.0%	+8.3%	-10.0%	-4.7%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%				+0.5%

Experts EU production forecast of Duck Meat



Experts EU production forecast of Rabbit Meat



Poland's data is the average of data reported by Industry and Copia

	FR	ES	IT	PL	BE	PT	EL	SK	CY	LT	MT	AT	DK	IE	NL	CZ	BG	UK	DE	HU	SE	RO	FI	HR	LV	EE	SI	EU
2017	61	56	44	26	10	6	5	4	1	0		0	0	0														212
17/16	-10.3%	-6.0%	-12.0%	+2.0%	+0.0%	+0.0%	+0.0%	+0.0%	-1.6%	+0.0%																		-7.1%
2018	55	54	40	26	10	6	5	4	1	0		0	0	0														200
18/17	-9.8%	-3.6%	-9.1%	+2.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%																		-5.4%

Comparison of real production versus experts forecast (In 1000 tonnes)

	2014				2015				2016		
	Experts	Real prod.	Difference		Experts	Real prod.	Difference		Experts	Real prod.	Difference
BE	250	433	+73,3%		250	453	+81,2%		250	461	+84,5%
BG	100	98	-2,1%		102	101	-0,7%		102	106	+4,4%
CZ	175	149	-14,7%		169	151	-10,6%		177	157	-11,6%
DK	173	143	-17,3%		147	134	-8,5%		156	144	-7,6%
DE	1.785	1.527	-14,4%		1.800	1.511	-16,1%		1.776	1.525	-14,1%
EE	15	19	+28,3%		15	20	+32,3%		15	21	+36,8%
EL	191	191	+0,0%		190	190	-0,2%		192	213	+10,8%
ES	1.390	1.437	+3,4%		1.435	1.447	+0,8%		1.526	1.527	+0,0%
FR	1.827	1.678	-8,1%		1.867	1.718	-8,0%		1.831	1.669	-8,9%
HR	68	59	-12,4%		77	63	-17,6%		81	64	-21,2%
IE	129	116	-10,2%		132	128	-3,3%		132	146	+10,2%
IT	1.261	1.243	-1,5%		1.307	1.295	-0,9%		1.389	1.366	-1,6%
CY	29	22	-26,0%		29	24	-18,6%		24	24	+0,5%
LV	21	29	+36,1%		21	30	+40,7%		21	30	+43,0%
LT	126	94	-25,2%		130	96	-26,0%		148	104	-29,6%
LU											
HU	543	430	-20,7%		567	479	-15,6%		621	508	-18,2%
MT	6	4	-34,3%		6	4	-34,7%		6	4	-36,0%
NL	941	1.026	+9,0%		1.057	1.058	+0,1%		1.097	1.112	+1,4%
AT	114	113	-0,3%		119	119	+0,3%		119	125	+5,1%
PL	2.016	1.804	-10,5%		2.212	2.011	-9,1%		2.888	2.268	-21,5%
PT	327	295	-9,7%		334	309	-7,6%		342	326	-4,6%
RO	382	346	-9,5%		353	375	+6,3%		375	391	+4,2%
SI	60	60	+0,0%		60	59	-2,2%		61	64	+5,0%
SK	85	64	-24,0%		86	65	-24,8%		86	63	-26,3%
FI	112	113	+1,0%		117	117	+0,2%		121	125	+3,3%
SE	86	135	+57,1%		118	146	+24,0%		141	154	+8,9%
UK	1.587	1.643	+3,5%		1.625	1.689	+3,9%		1.666	1.791	+7,5%

EU	13.797	13.271	-3,8%
	No expert for this MS		
	No data communicated		

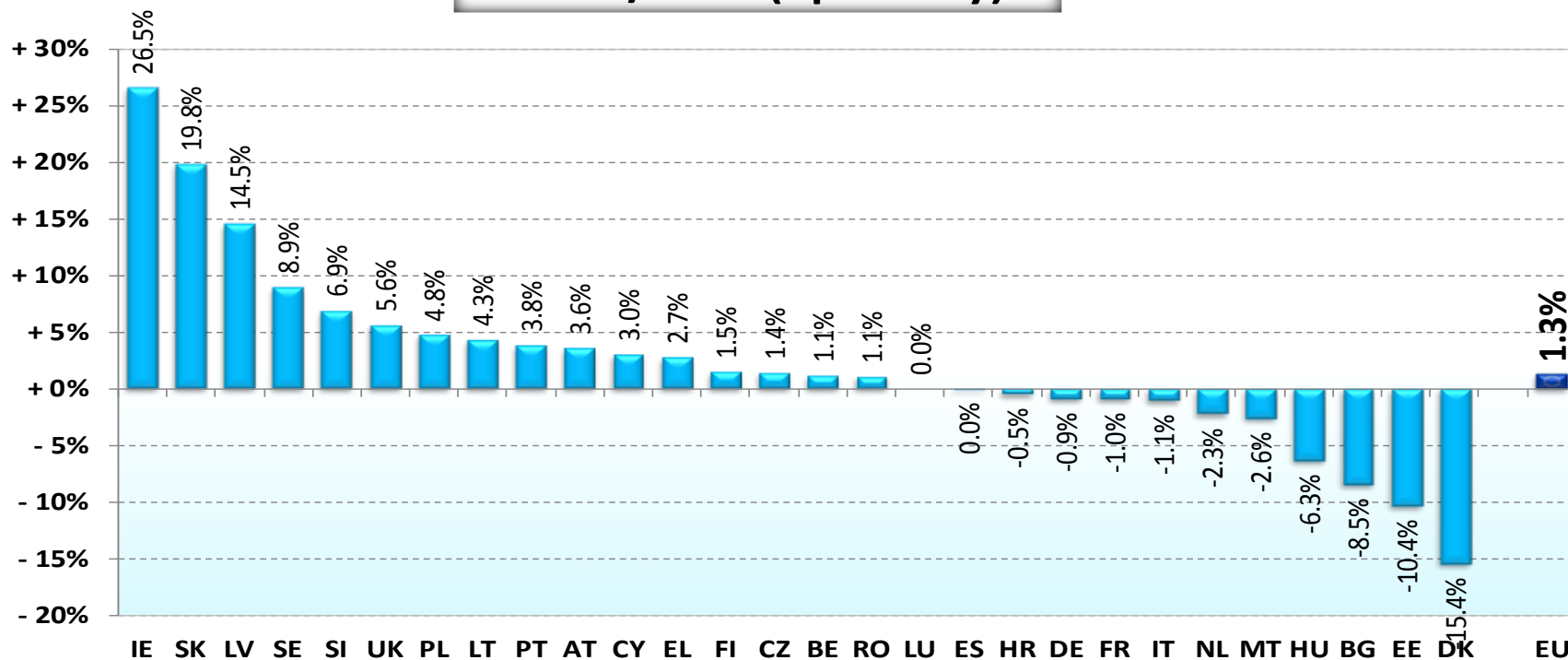
14.325	13.790	-3,7%
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3,8%	3,9%
Change experts 15/14	Change real prod. 15/14

15.343	14.488	-5,6%
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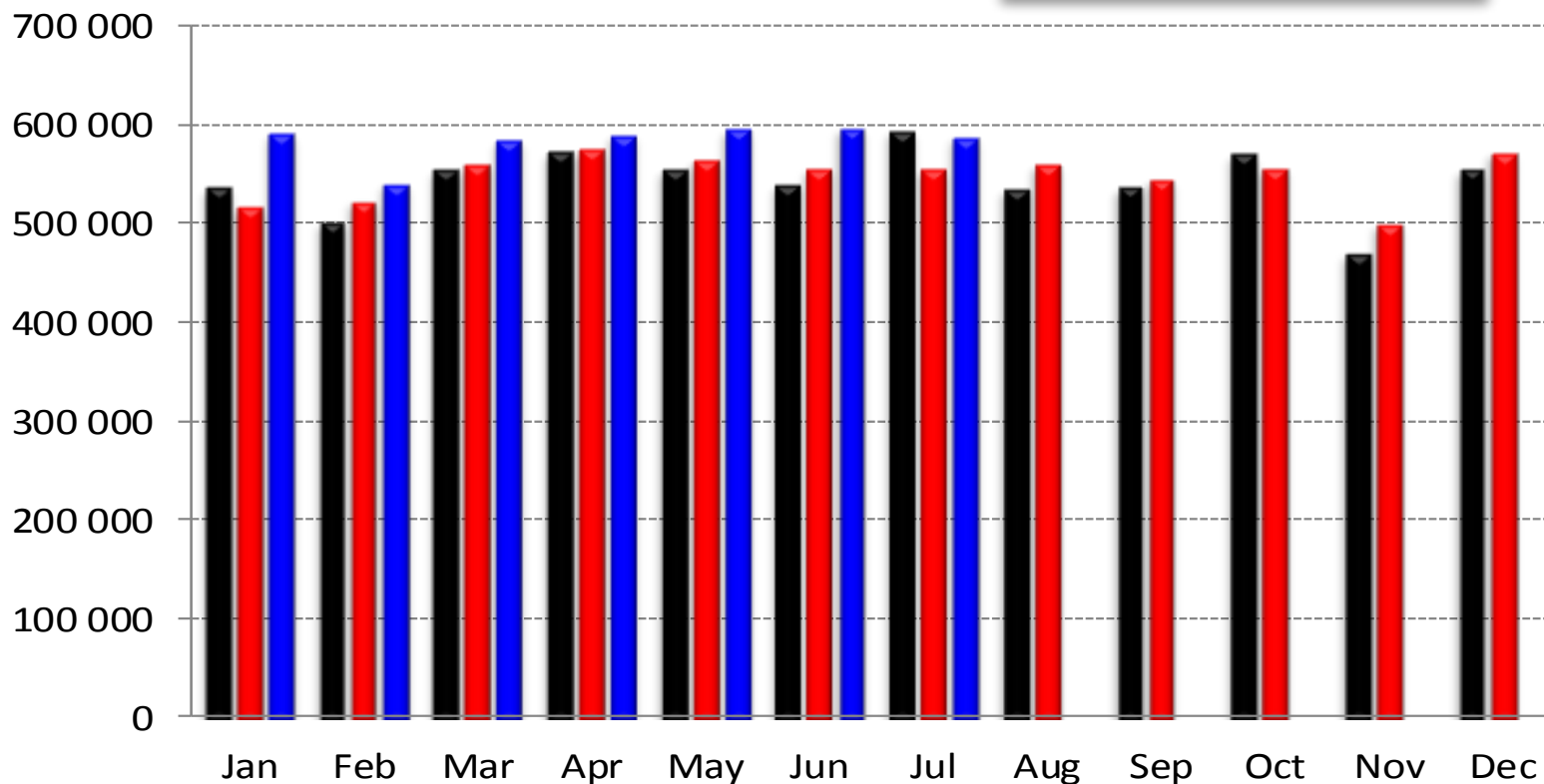
7,1%	5,1%
Change experts 16/15	Change real prod. 16/15

Change in Poultry slaughter 2017/2016 (up to July)

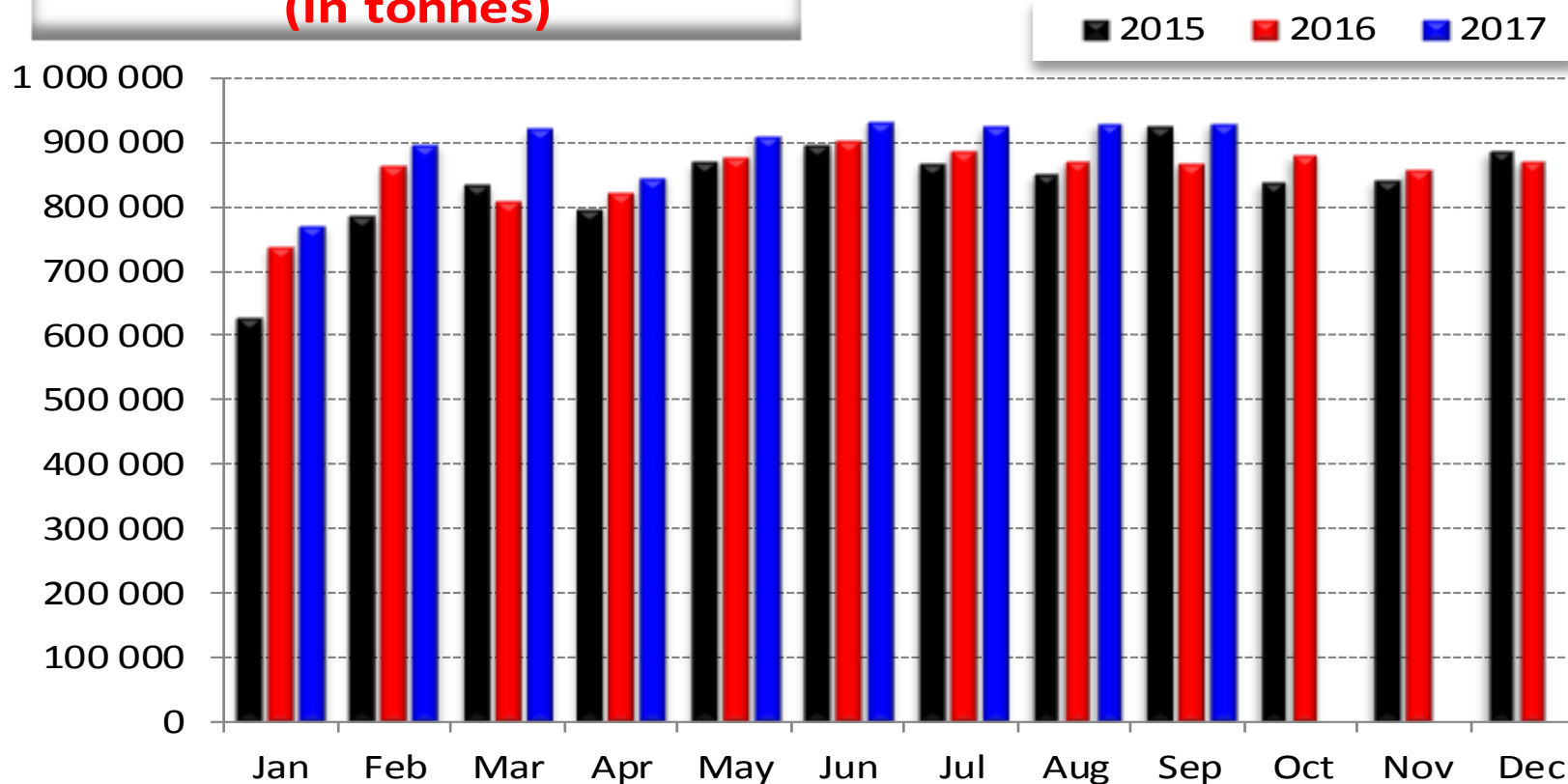


Placings of broiler chicks (1 000 pieces)

■ 2015 ■ 2016 ■ 2017



Production forecast of broiler (In tonnes)



PRICES



Prices

EU
WEEK PRICES

44

EVOLUTION SINCE

last WEEK

last MONTH

last YEAR

BROILER

182.43

€/100 kg carcase weight

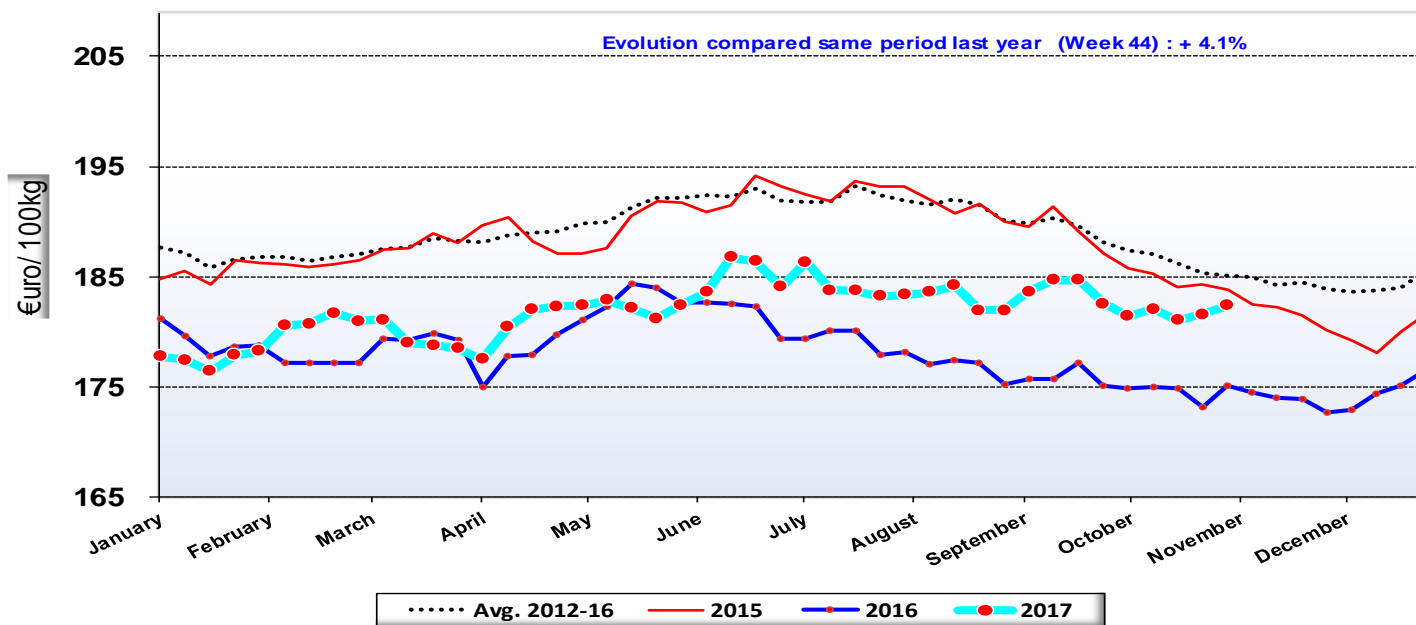
+ 0.5%

+ 0.6%

+ 4.1%

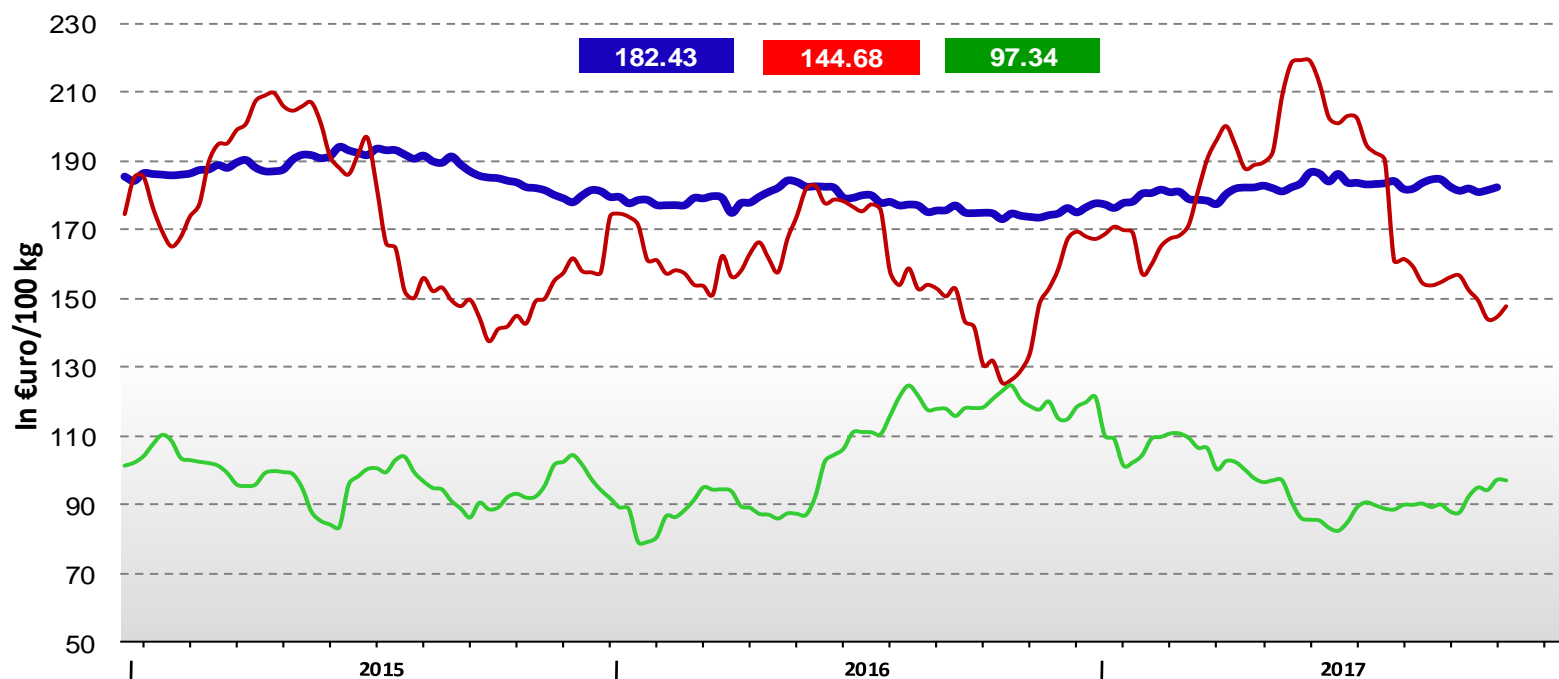
Evolution of the weekly EU average price for **Broiler**

Latest price ==> 182.43 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)

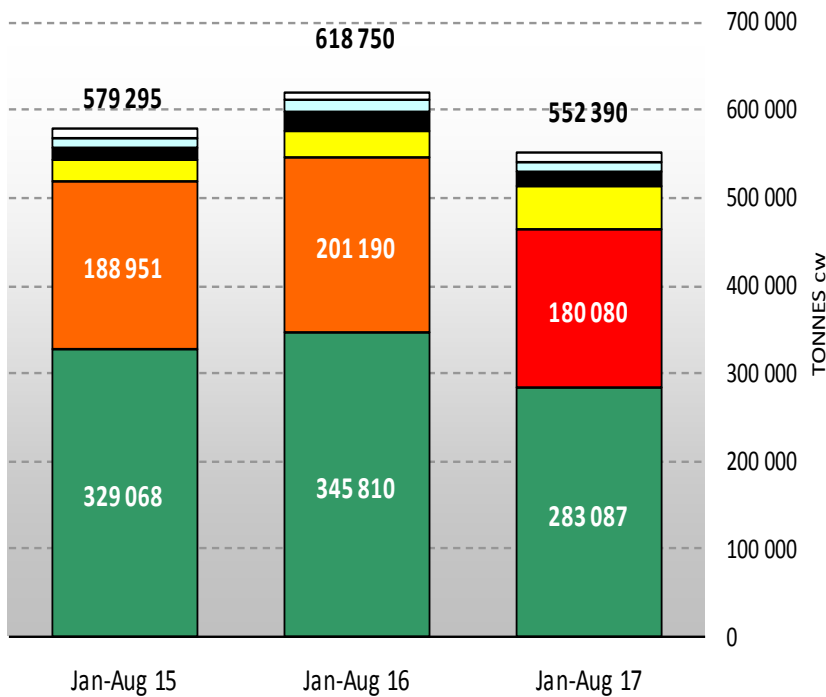
EU US BR

Imports of Poultry meat from selected origins

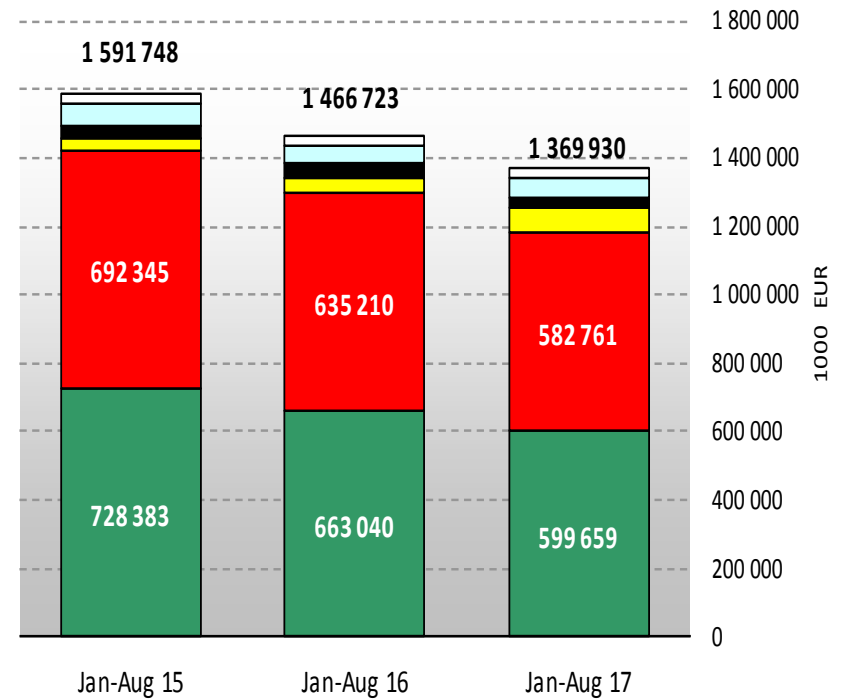
	2013		2014		2015		2016		Jan-Aug 17	Compared to Jan-Aug 16	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes		%
Brazil	506 374	62.7%	507 355	60.0%	501 327	57.3%	502 985	55.9%	283 087	51.2%	- 18% - 10% + 68% - 33% + 12% - 1% +++ + 3%
Thailand	228 238	28.3%	251 185	29.7%	274 524	31.4%	290 072	32.2%	180 080	32.6%	
Ukraine	276	0.0%	19 958	2.4%	42 513	4.9%	48 039	5.3%	50 662	9.2%	
Chile	30 515	3.8%	25 815	3.1%	22 232	2.5%	28 875	3.2%	14 921	2.7%	
China	18 145	2.2%	19 761	2.3%	18 403	2.1%	16 946	1.9%	12 594	2.3%	
Argentina	10 783	1.3%	10 996	1.3%	8 529	1.0%	6 463	0.7%	4 291	0.8%	
South Africa	55	0.0%	701	0.1%	724	0.1%	302	0.0%	2 143	0.4%	
Switzerland	3 817	0.5%	4 307	0.5%	2 424	0.3%	2 543	0.3%	1 606	0.3%	
Others	9 071	1.1%	5 666	0.7%	4 260	0.5%	3 780	0.4%	3 007	0.5%	
Extra-EU	807 274		845 743		874 937		900 004		552 390		
% change			+ 4.8%		+ 3.5%		+ 2.9%		- 10.7%		

EU Poultry meat Imports

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (1000 EUR)

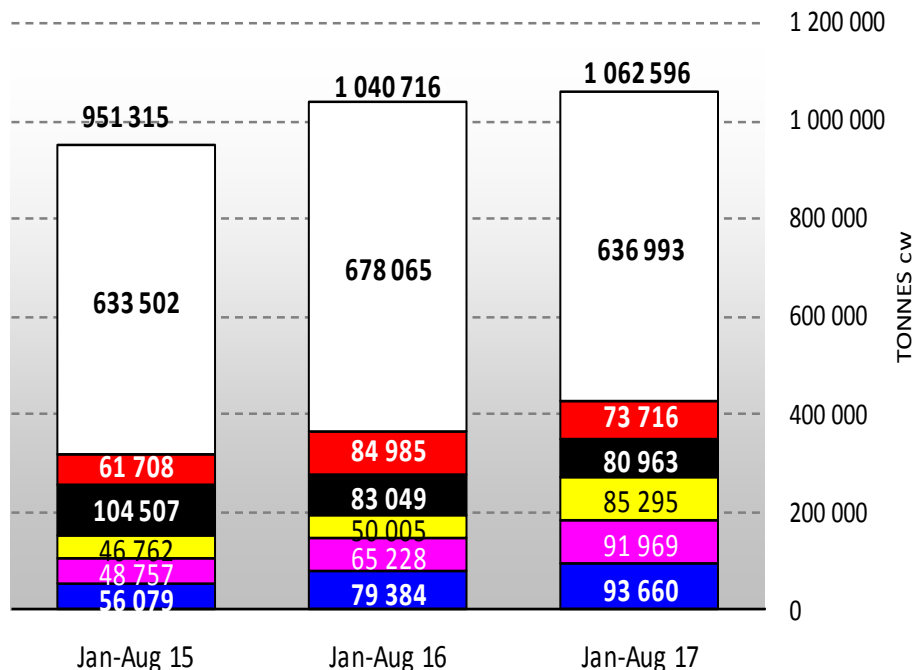


Exports of Poultry Meat to Selected Destinations

	2013		2014		2015		2016		Jan-Aug 17		Compared to Jan-Aug 16
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Hong Kong	116 963	8.2%	136 177	9.1%	100 945	6.8%	123 766	7.7%	93 660	8.8%	+ 18%
Ukraine	75 965	5.3%	80 084	5.3%	90 850	6.1%	114 899	7.1%	91 969	8.7%	+ 41%
Ghana	75 252	5.3%	56 900	3.8%	68 283	4.6%	77 159	4.8%	85 295	8.0%	+ 71%
Benin	139 247	9.7%	163 844	10.9%	138 414	9.3%	116 882	7.2%	80 963	7.6%	- 3%
Philippines	35 696	2.5%	57 641	3.8%	100 719	6.8%	126 845	7.8%	73 716	6.9%	- 13%
Saudi Arabia	154 787	10.8%	123 574	8.2%	142 496	9.6%	121 645	7.5%	65 807	6.2%	- 18%
South Africa	158 548	11.1%	203 412	13.5%	213 577	14.3%	270 176	16.7%	58 135	5.5%	- 67%
Congo (Dem. Rep.)	28 625	2.0%	33 697	2.2%	35 269	2.4%	44 465	2.8%	37 874	3.6%	+ 70%
Gabon	25 070	1.8%	29 409	2.0%	37 330	2.5%	31 925	2.0%	35 099	3.3%	+ 100%
Vietnam	13 564	0.9%	19 884	1.3%	27 128	1.8%	36 115	2.2%	34 987	3.3%	+ 47%
Russia	95 200	6.7%	68 363	4.5%	1 223	0.1%	1 109	0.1%	612	0.1%	- 20%
Other Destinations	509 553	35.7%	530 998	35.3%	533 195	35.8%	551 247	34.1%	404 479	38.1%	
Extra-EU	1 428 470		1 503 984		1 489 430		1 616 232		1 062 596		
% change			+ 5.3%		- 1.0%		+ 8.5%		+ 2.1%		

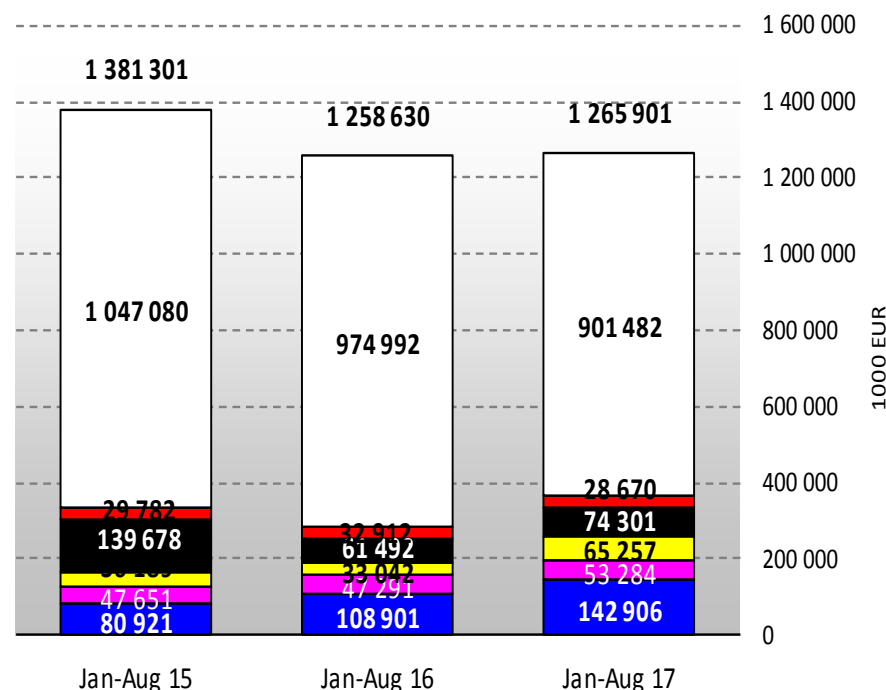
EU Poultry meat Export

EU EXPORTS of Poultry Meat (TONNES cwe)



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

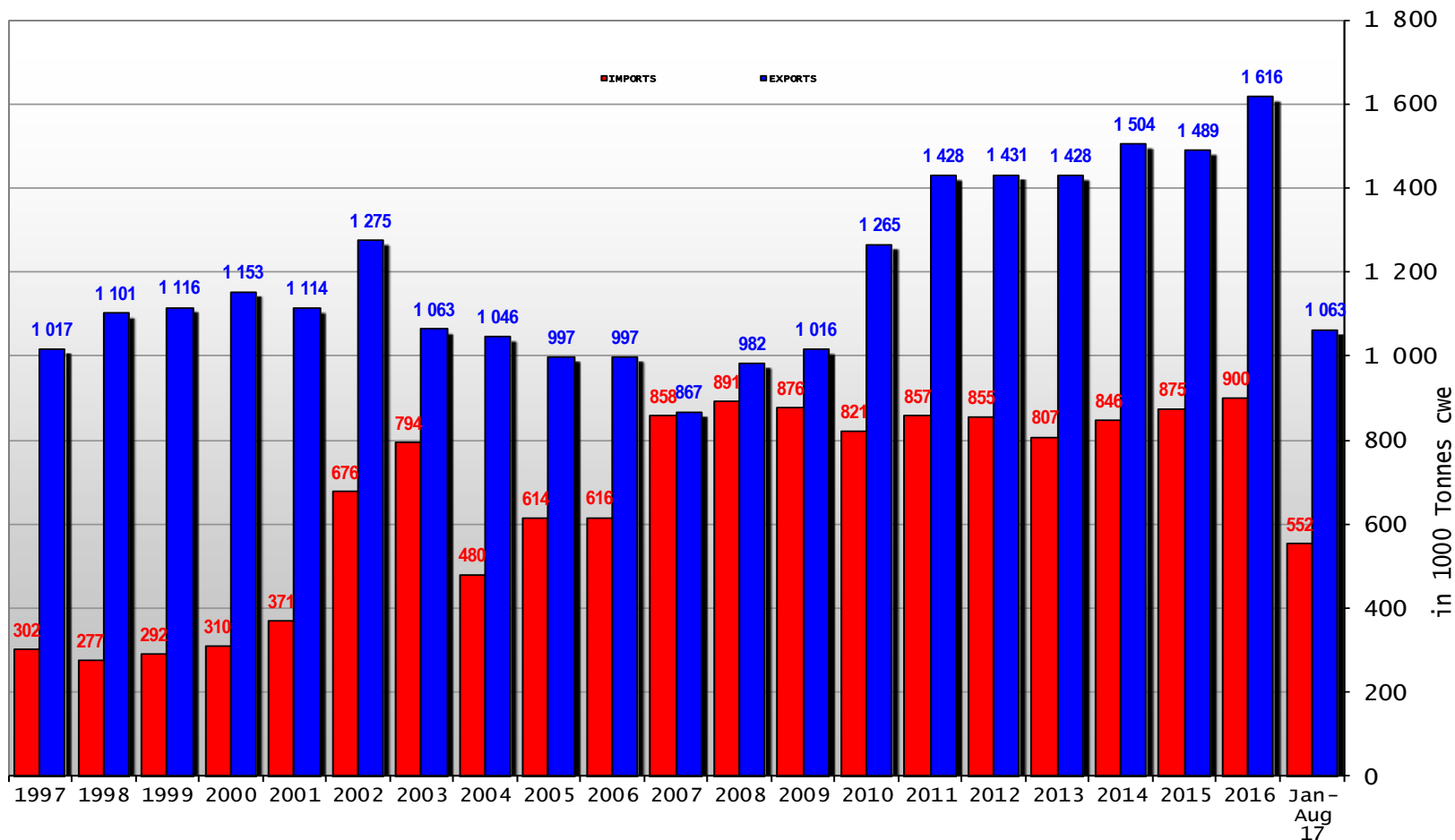
EU EXPORTS of Poultry Meat (1000 EUR)



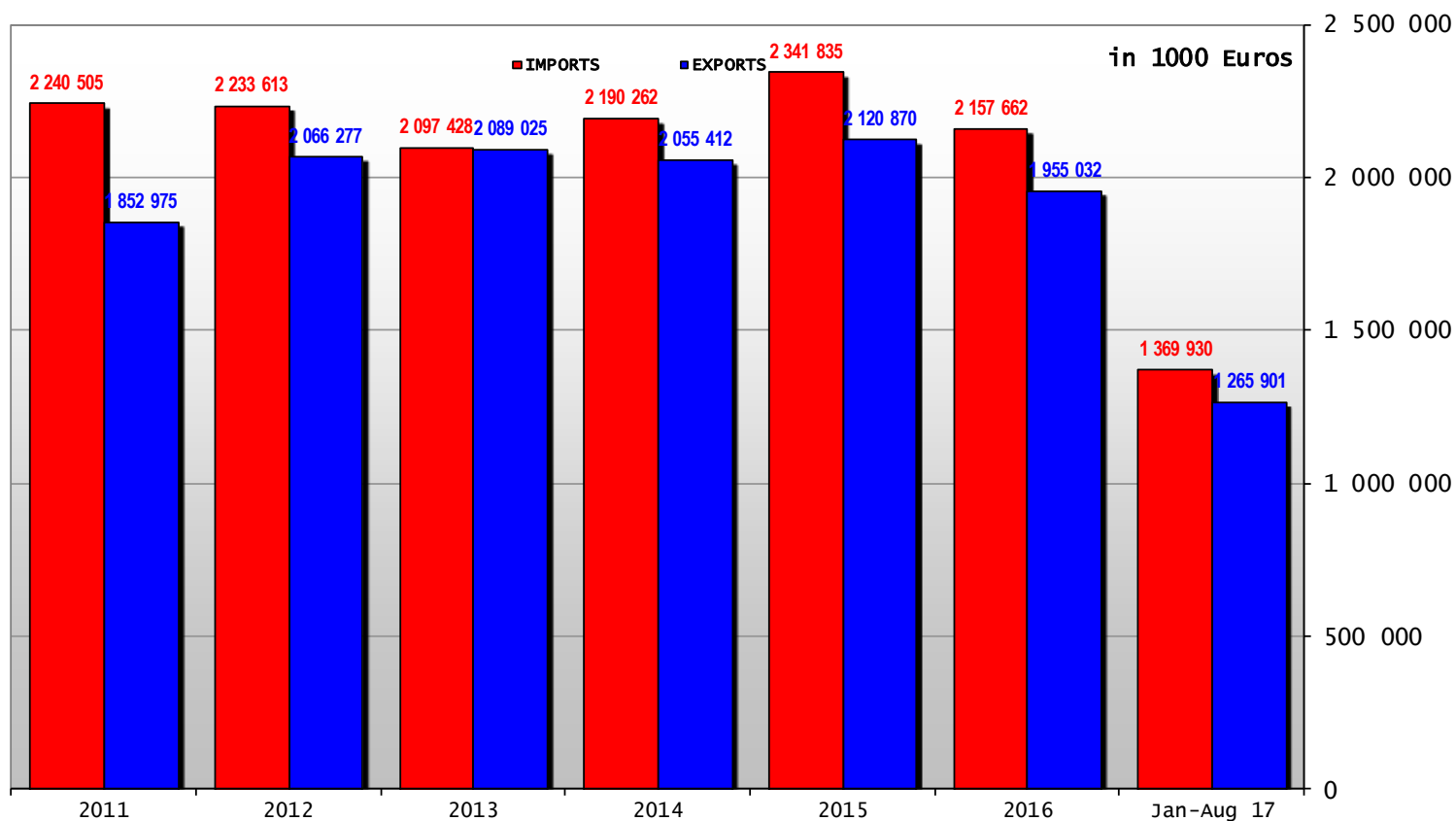
■ Hong Kong ■ Ukraine ■ Ghana ■ Benin ■ Philippines □ Other destinations *

* countries trading less than 1 266 000 ('000 EUR)

EU Poultry meat Trade Balance



EU Poultry meat trade balance (in 1000 euros)





Examples of countries which have accepted regionalisation for recent outbreaks of AI- either for all MSs or to some MSs – either for all or some products

- US, Canada
- Saudi Arabia, UAE, Oman
- Hong Kong, the Philippines, Singapore
- Albania, Bosnia and Herzegovina, FYROM, Serbia, Moldova
- Turkey, **Angola, Iran**
- Mexico
- Ukraine
- Russia (regionalisation only for hatching eggs/live birds)



Countries currently blocking the whole country due to AI outbreaks

- Asian countries: China, Korea, Japan, Taiwan, Vietnam, Malaysia, Thailand
- South-Africa
- Algeria, Morocco
- Israel
- Bangladesh, India, Nepal, Sri Lanka
- Cameroon, Ethiopia, Nigeria, Sudan
- Barbados

Lifting the ban after country free status

- Experiences from previous outbreaks: timelines to recognise country freedom after outbreaks, examples:
- 3-5 months: Japan, Singapore
- 5-7 months: Australia, Malaysia, Morocco, The Philippines
- 7-9 months: South Korea, South Africa, Kenya
- 9-11 months: Brazil, India
- 11-13 months: Algeria, Indonesia
- 13-15 months: Iraq
- >15 months: China, Thailand



Highlights positive developments

- Ukraine: mutual recognition of regionalisation for AI agreed
- Thailand: recognition of regionalisation for FR – pilot
- Recognition of regionalisation in trade – topic is actively discussed in WTO SPS Committee – support from other main trading partners such as USA.

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