

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

13 February 2024

FORECAST

Missing or incomplete data for BE BG EE EL HR LV LT MT SK SE

No expert for EE LU LV MT

EU production of poultry (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	3,053,870	3,114,770	3,155,230	2.0	1.3
DE	1,647,500	1,655,100	1,668,900	0.5	0.8
FR	1,576,471	1,607,958	1,637,640	2.0	1.8
ES	1,465,993	1,543,924	1,546,997	5.3	0.2
IT	1,218,000	1,342,000	1,354,000	10.2	0.9
NL	1,297,000	1,297,000	1,297,000	0.0	0.0
HU	655,100	699,062	741,060	6.7	6.0
RO	455,000	460,000	470,000	1.1	2.2
BE	441,250	448,300	448,300	1.6	0.0
PT	362,700	373,600	379,600	3.0	1.6
EL	296,500	296,500	296,500	0.0	0.0
SE	187,000	192,000	192,000	2.7	0.0
CZ	201,500	200,500	180,000	0.5	-0.2
DK	156,700	158,900	162,500	1.4	2.3
AT	151,810	151,810	151,810	0.0	0.0
IE	228,000	143,000	150,500	-37.3	5.2
FI	147,100	145,200	149,300	1.3	2.8
LT	140,000	140,000	140,000	0.0	0.0
BG	112,000	110,500	110,500	1.3	0.0
SK	109,000	109,000	109,000	0.0	0.0
SI	75,060	77,040	78,300	2.6	1.6
HR	61,270	61,270	61,270	0.0	0.0
CY	27,150	27,790	28,100	2.4	1.1
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
EU27	14,107,974	14,397,224	14,550,507	2.1	1.1

FORECAST

EU production of broiler (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	2,539,950	2,603,450	2,643,540	2.5	1.5
ES	1,264,836	1,322,781	1,330,550	4.6	0.6
DE	1,295,800	1,300,000	1,310,000	0.3	0.8
FR	1,182,100	1,202,900	1,222,300	1.8	1.6
NL	1,223,000	1,223,000	1,223,000	0.0	0.0
IT	992,000	1,056,000	1,068,000	6.5	1.1
HU	464,610	495,800	516,260	6.7	4.1
RO	435,000	440,000	450,000	1.1	2.3
BE	435,060	441,500	441,500	1.5	0.0
PT	308,100	317,300	322,100	3.0	1.5
EL	282,400	282,400	282,400	0.0	0.0
SE	182,000	187,000	187,000	2.7	0.0
CZ	180,000	180,000	160,000	0.0	-11.1
DK	151,500	154,700	158,000	2.1	2.1
FI	138,300	136,500	141,000	-1.3	3.3
IE	190,000	126,000	130,000	-33.7	3.2
LT	130,000	130,000	130,000	0.0	0.0
AT	128,400	128,400	128,400	0.0	0.0
SK	106,000	106,000	106,000	0.0	0.0
BG	90,000	89,000	89,000	-1.1	0.0
SI	69,550	71,590	73,000	2.9	2.0
HR	61,270	61,270	61,270	0.0	0.0
CY	27,000	27,700	28,000	2.6	1.1
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
EU27	11,915,056	12,121,471	12,239,500	1.7	1.0

EU production of turkey (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	425,110	416,990	415,750	-1.9	-0.3
DE	323,800	326,300	330,000	0.8	1.1
IT	219,000	277,000	277,000	26.5	0.0
FR	252,000	246,400	242,200	-2.2	-1.7
ES	197,857	217,643	212,947	10.0	-2.2
HU	102,960	97,400	101,500	-5.4	4.2
PT	45,700	44,300	45,000	-3.1	1.6
NL	44,000	44,000	44,000	0.0	0.0
AT	21,560	21,560	21,560	0.0	0.0
RO	20,000	20,000	20,000	0.0	0.0
HR	18,000	18,000	18,000	0.0	0.0
EL	14,100	14,100	14,100	0.0	0.0
IE	32,500	11,000	14,000	-66.2	27.3
CZ	10,500	10,000	10,000	-4.8	0.0
FI	8,800	8,700	8,300	-1.1	-4.6
BE	6,190	6,800	6,800	9.9	0.0
LT	5,500	5,500	5,500	0.0	0.0
SI	5,510	5,450	5,300	-1.1	-2.8
SE	5,000	5,000	5,000	0.0	0.0
DK	5,100	4,200	4,500	-17.6	7.1
SK	3,000	3,000	3,000	0.0	0.0
CY	150	90	100	-40.0	11.1
BG					
LV					
EE					
MT					
EU27	1,766,437	1,803,533	1,804,657	2.1	0.1

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FORECAST

EU production of duck (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
FR	118,300	133,600	148,300	12.9	11.0
HU	70,350	84,780	101,700	20.5	20.0
PL	64,600	68,860	69,900	6.6	1.5
NL	30,000	30,000	30,000	0.0	0.0
DE	24,200	25,000	25,000	3.3	0.0
BG	22,000	21,500	21,500	-2.3	0.0
PT	8,900	12,000	12,500	34.8	4.2
CZ	11,000	10,500	10,000	-4.5	-4.8
IE	5,500	6,000	6,500	9.1	8.3
ES	3,300	3,500	3,500	6.1	0.0
IT	3,000	4,000	4,000	33.3	0.0
AT	1,210	1,210	1,210	0.0	0.0
DK	100	100	100	0.0	0.0
SK	600	600	600	0.0	0.0
HR	500	500	500	0.0	0.0
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					
EU27	363,665	402,255	435,415	10.6	8.2

EU production of rabbit (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
ES	40,930	38,840	38,000	-5.1	-2.2
IT	26,000	24,000	23,000	-7.7	-4.2
FR	23,640	21,500	19,900	-9.1	-7.4
CZ	9,000	9,000	9,000	0.0	0.0
PL	10,000	9,000	8,000	-10.0	-11.1
EL	5,000	5,000	5,000	0.0	0.0
PT	3,800	3,700	3,700	-2.6	0.0
SK	3,600	3,600	3,600	0.0	0.0
CY	530	550	550	3.8	0.0
BE	240	230	230	-4.2	0.0
LT	2	2	2	0.0	0.0
MT					
AT					
DK					
IE					
NL					
BG					
DE					
HU					
SE					
RO					
FI					
HR					
LV					
EE					
SI					
EU27	122,742	115,422	110,982	-6.0	-3.8

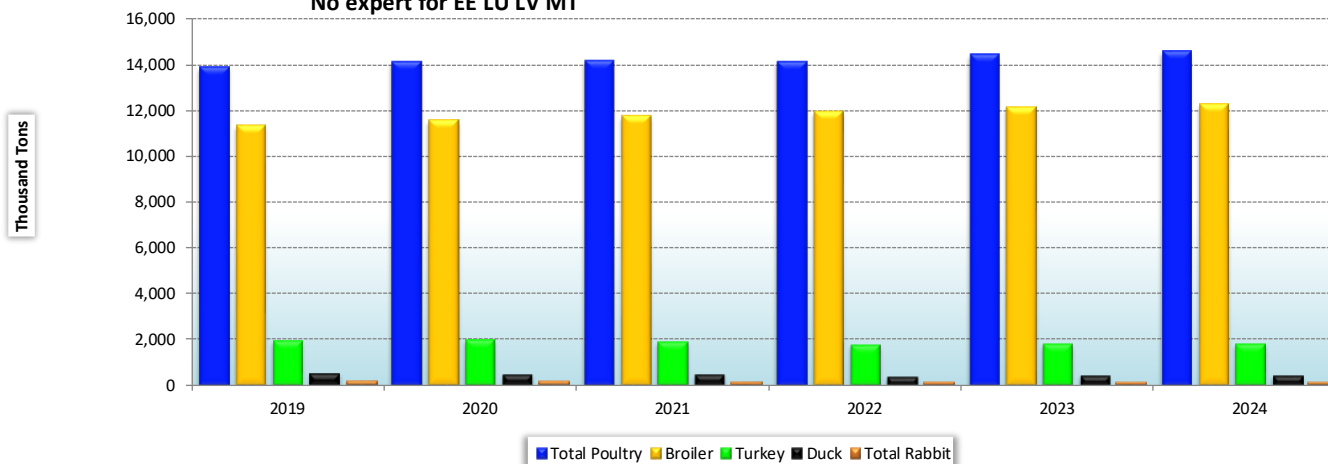
13 February 2024

FORECAST

Experts EU27 production forecast on Poultry and Rabbit

Missing or incomplete data for BE BG EE EL HR LV LT MT SK SE

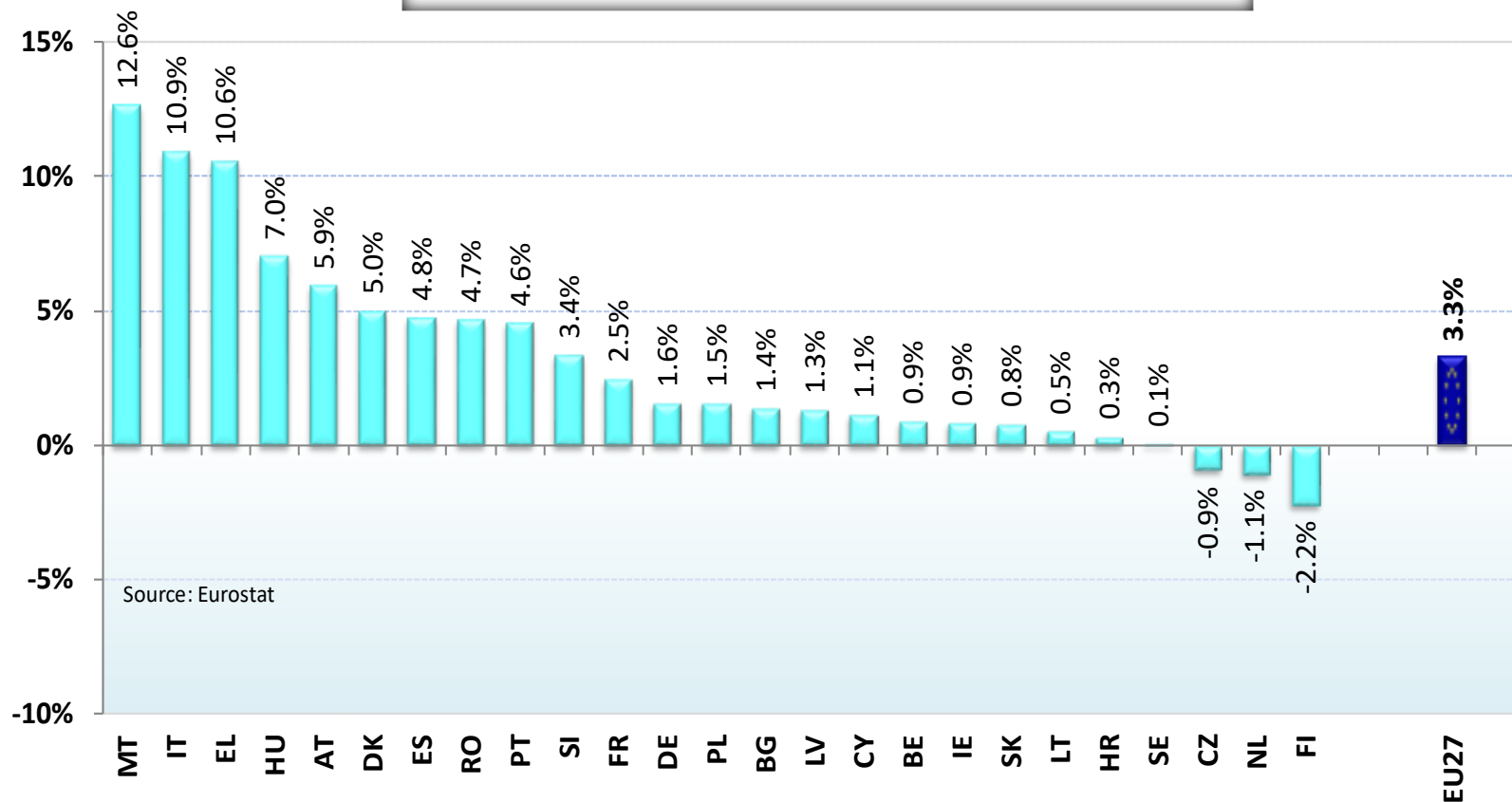
No expert for EE LU LV MT



	2019	2020	2021	2022	2023	2024	% 2023/ 2022	% 2024/ 2023
Total Poultry	13,860	14,072	14,125	14,108	14,397	14,551	+ 2.1%	+ 1.1%
Broiler	11,289	11,544	11,732	11,915	12,121	12,240	+ 1.7%	+ 1.0%
Turkey	1,946	2,013	1,888	1,766	1,804	1,805	+ 2.1%	+ 0.1%
Duck	518	452	458	364	402	435	+ 10.6%	+ 8.2%
Total Rabbit	180	164	136	123	115	111	- 6.0%	- 3.8%

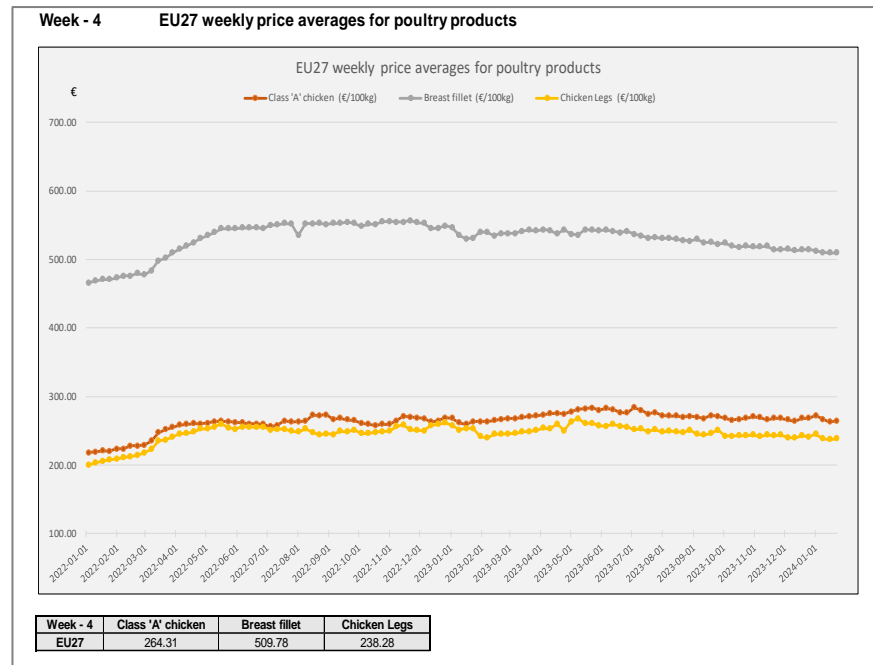
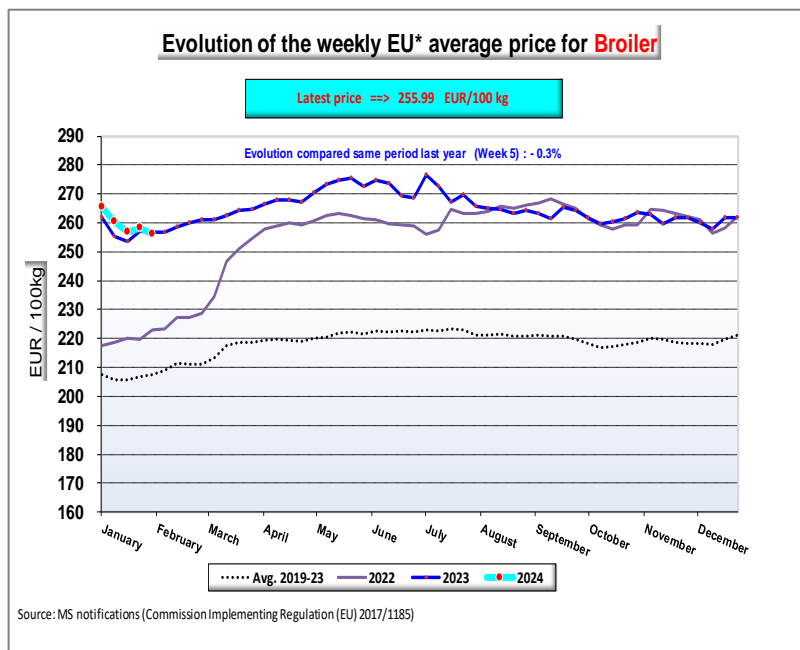
PRODUCTION

Change in Poultry Meat Production in % 2023/2022 (up to November)



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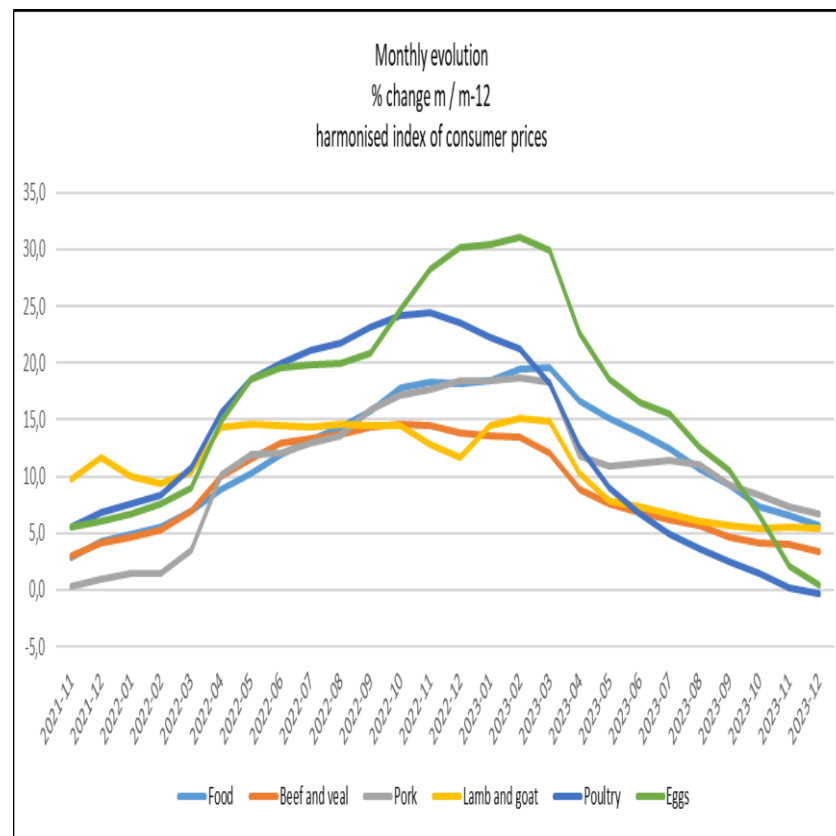
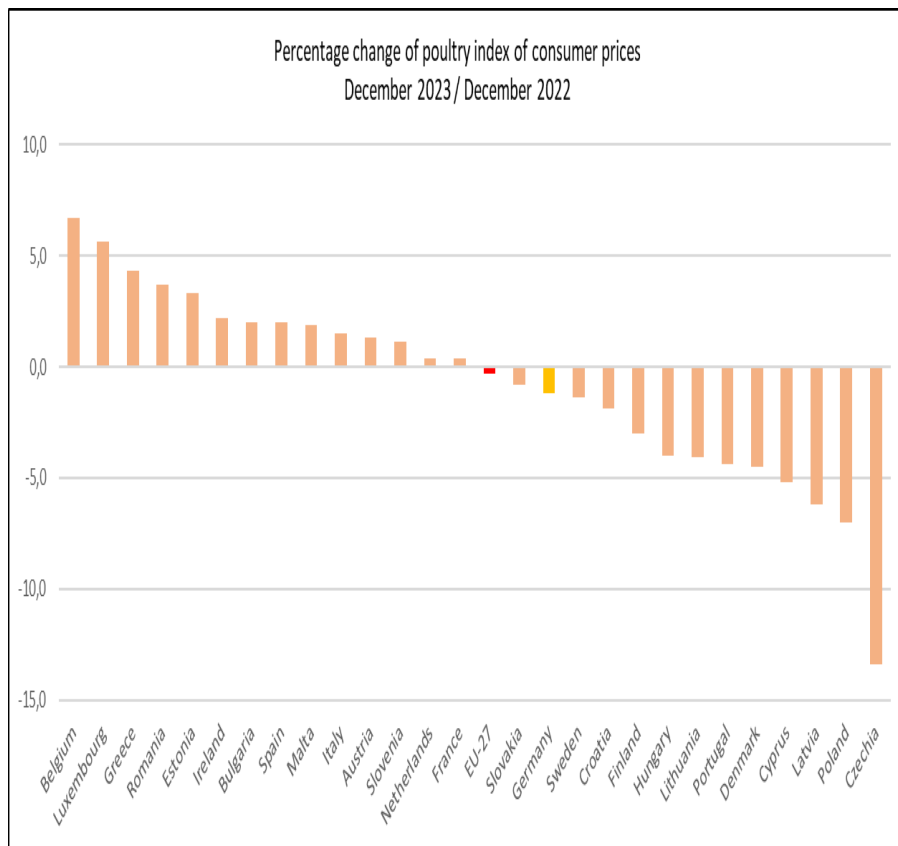
Weekly prices of poultry products



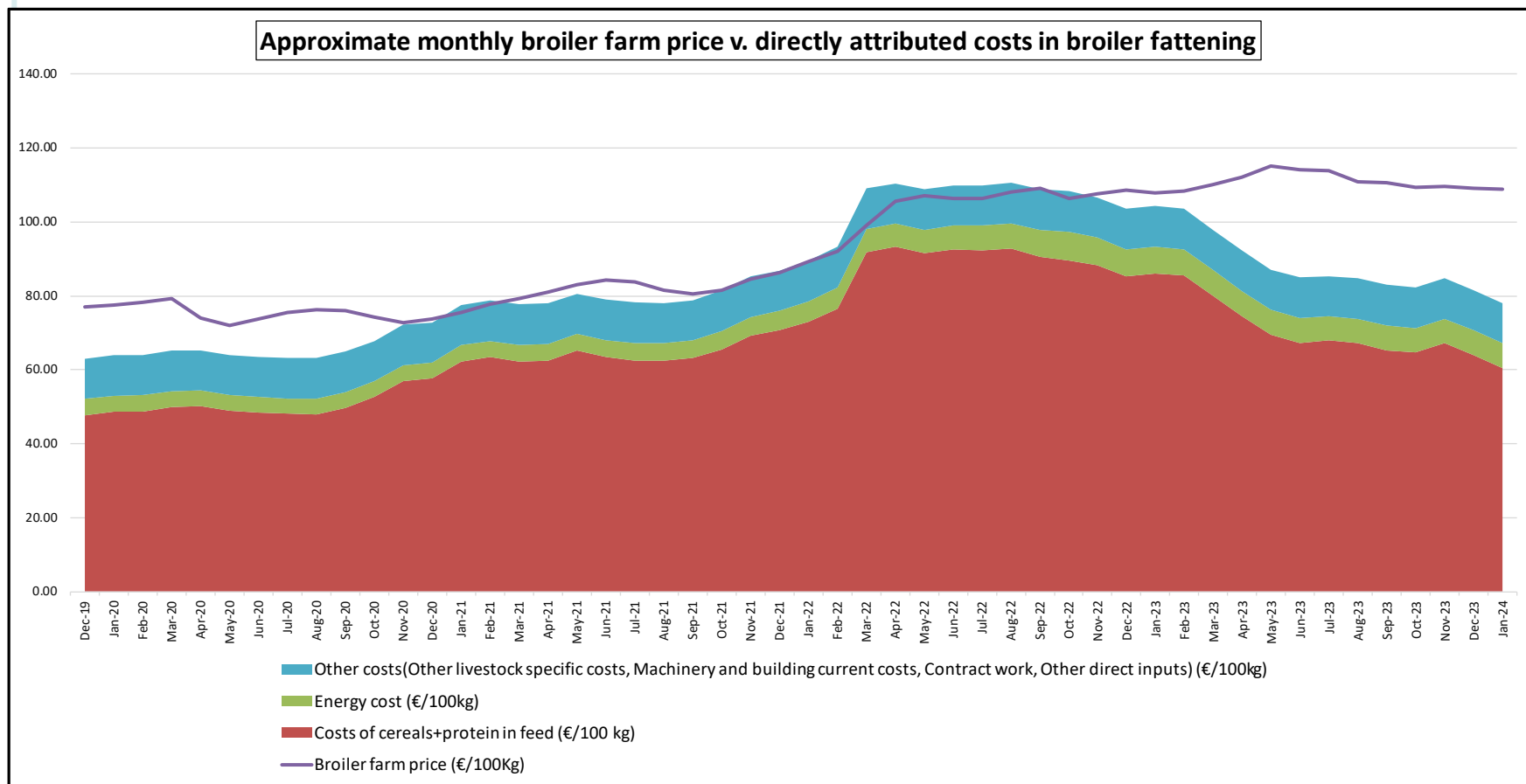
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
Prices reported by MS are preliminary and may be subject to change

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Harmonised index of consumer prices



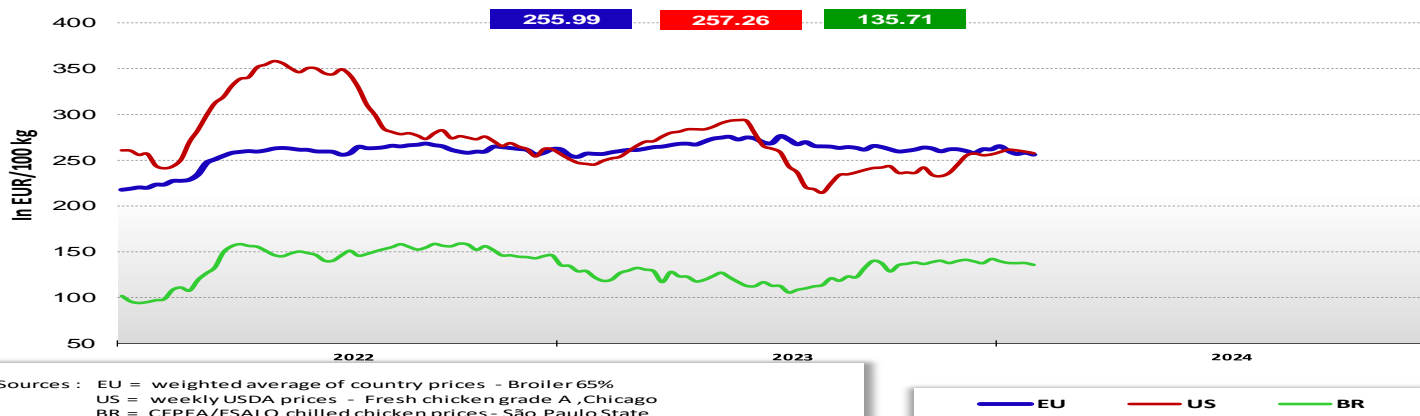
COST BROILER PRODUCTION



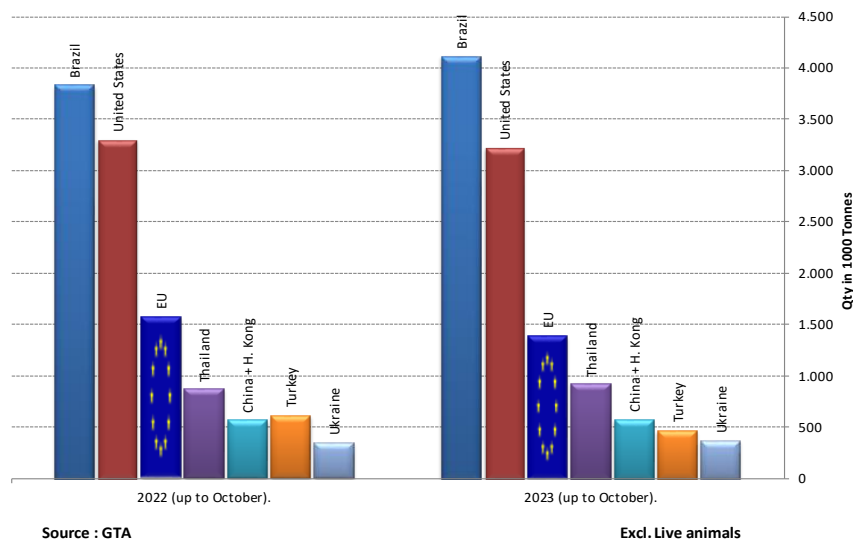
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

INTERNATIONAL

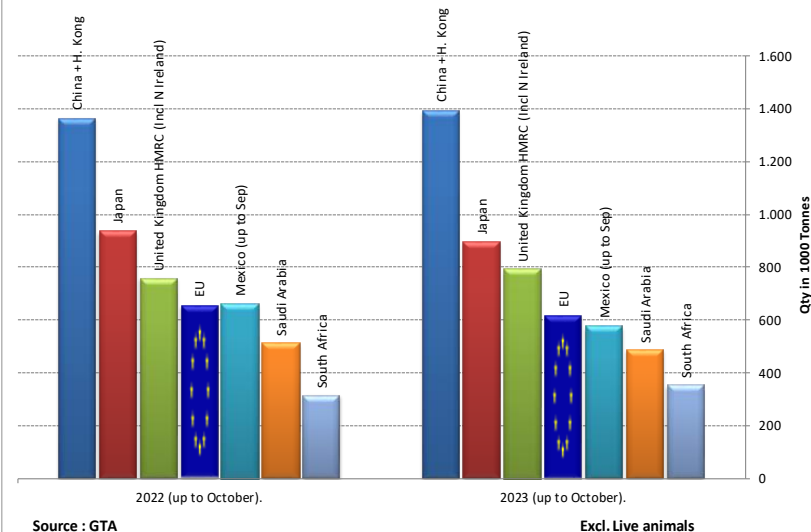
Broiler prices in EU, USA and Brazil



Main Exporters of POULTRY Products (up to October).



Main Importers of POULTRY Products (up to October).



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Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 06/02/2024)

Country code	Count of	Sum of Number of animals	% of outbreaks	% of animals
HU	76	1.603.222	44%	30%
BG	10	1.333.364	6%	25%
PL	17	512.205	10%	10%
DE	26	473.679	15%	9%
FR	9	402.162	5%	8%
NL	3	156.943	2%	3%
IT	5	150.248	3%	3%
DK	9	145.054	5%	3%
BE	4	103.394	2%	2%
SK	4	92.366	2%	2%
CZ	2	89.300	1%	2%
HR	2	83.851	1%	2%
RO	3	73.747	2%	1%
SE	2	52.348	1%	1%
LT	1	6.361	1%	0%
Grand Total	173	5.278.244	100%	100%

Third countries currently imposing import bans on EU poultry due to HPAI outbreaks:

Country-wide bans:

- the Philippines, South Korea, Thailand, China, Japan
- South Africa, Morocco
- Kuwait, the United Arab Emirates

Regionalisation accepted (either for all MSs or to some MSs – either for all or some products):

- Kyrgyzstan, Kazakhstan, the United Arab Emirates
- North Macedonia, Turkey
- Thailand, Japan

https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en

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EU-27 Exports of poultry meat to selected destinations

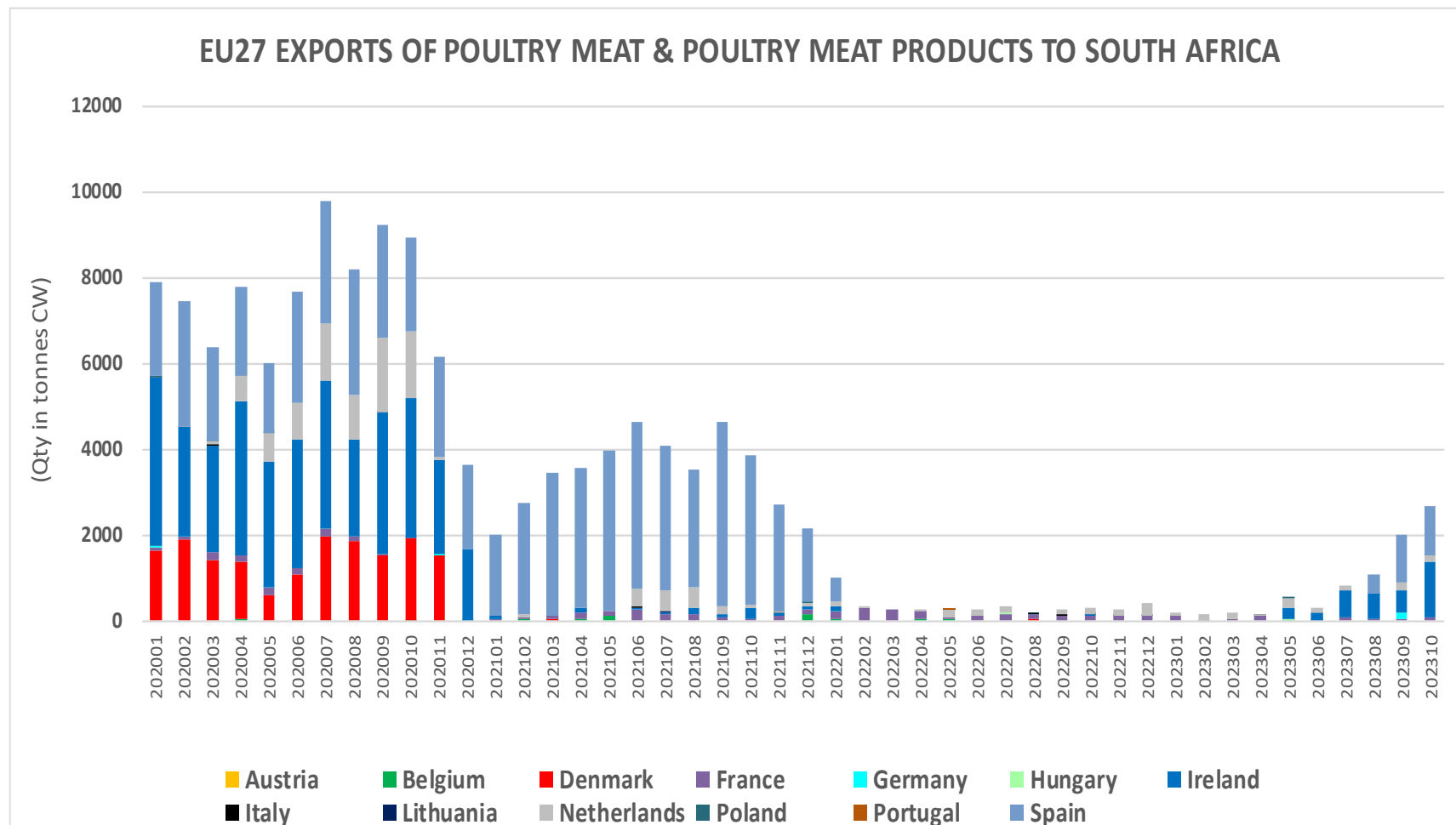
In Tons of Carcase Weight

	2021		2022		Jan to Oct 2023		Compared to Jan to Oct 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	725.611	32%	732.502	36%	613.899	37%	+1%
Ghana	228.066	10%	156.456	8%	125.539	8%	-8%
Congo (Dem. Rep.)	139.852	6%	125.422	6%	87.058	5%	-14%
Ukraine	162.267	7%	105.810	5%	75.198	5%	-15%
Benin	64.358	3%	63.516	3%	53.817	3%	+1%
Saudi Arabia	58.457	3%	74.590	4%	52.579	3%	-14%
Vietnam	31.784	1%	29.751	1%	45.555	3%	+74%
Congo	30.303	1%	35.562	2%	36.639	2%	+27%
Uzbekistan	32.390	1%	34.474	2%	35.768	2%	+30%
Switzerland	33.390	1%	33.784	2%	29.051	2%	+3%
Guinea	31.324	1%	32.876	2%	29.029	2%	+2%
Other Destinations	714.573	32%	605.496	30%	464.852	28%	-6%
Extra-EU	2.252.375		2.030.239		1.648.985		-1,9%
% Change			-10%				

In Thousand Euros

	2021		2022		Jan to Oct 2023		Compared to Jan to Oct 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	2.009.674	51%	2.652.356	56%	2.143.223	55%	-0,6%
Ghana	224.103	6%	167.715	4%	132.158	3%	-9,5%
Congo (Dem. Rep.)	116.553	3%	145.772	3%	97.049	2%	-17,2%
Ukraine	119.533	3%	102.729	2%	109.165	3%	+33,4%
Benin	87.264	2%	106.959	2%	92.029	2%	+3,1%
Saudi Arabia	93.283	2%	159.672	3%	100.277	3%	-25,6%
Vietnam	35.592	1%	39.533	1%	56.484	1%	+62,6%
Congo	26.636	1%	36.276	1%	33.075	1%	+15,8%
Uzbekistan	23.945	1%	27.742	1%	27.069	1%	+22,2%
Switzerland	179.202	5%	210.024	4%	180.056	5%	+7,5%
Guinea	31.994	1%	43.756	1%	41.178	1%	+10,8%
Other Destinations	1.024.600	26%	1.043.605	22%	912.871	23%	+7,8%
Extra-EU	3.972.379		4.736.138		3.924.635		+1,6%
% Change			+19,2%				

EU-27 Exports of poultry meat to selected destinations



EU-27 Imports of poultry meat from selected origins

In Tons of Carcase Weight

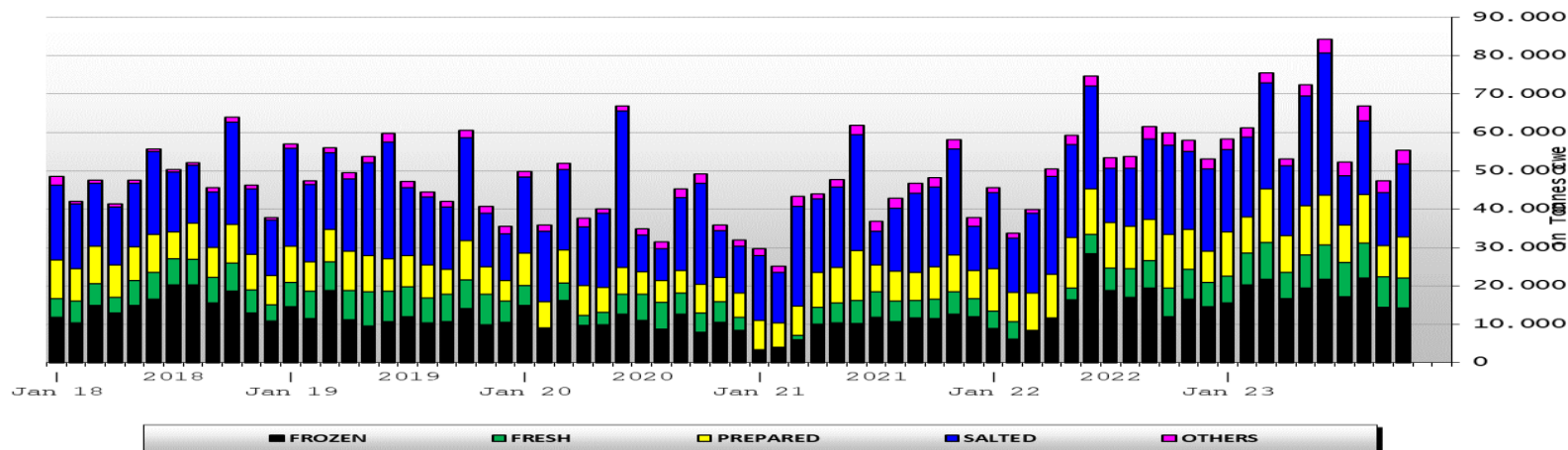
	2021		2022		Jan to Oct 2023		Compared to Jan to Oct 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
Brazil	251.887	32%	301.201	35%	248.726	33%	-0%
Ukraine	102.892	13%	162.837	19%	202.851	27%	+56%
United Kingdom	274.667	34%	210.851	25%	138.037	18%	-26%
Thailand	130.658	16%	131.223	15%	130.115	17%	+17%
China	20.916	3%	32.864	4%	31.502	4%	+13%
Chile	2.441	0%	466	0%	2.876	0%	+++
Bosnia-Herz.	1.608	0%	3.000	0%	2.488	0%	-6%
Argentina	3.151	0%	4.096	0%	1.934	0%	-43%
Switzerland	2.310	0%	2.166	0%	1.818	0%	-8%
Norway	2.508	0%	2.094	0%	1.806	0%	+0%
Tunisia	1.840	0%	1.721	0%	790	0%	-47%
Other Destinations	2.179	0%	2.133	0%	1.856	0%	+7%
Extra-EU	797.056		854.651		764.800		+6,3%
% Change			7%				

In Thousand Euros

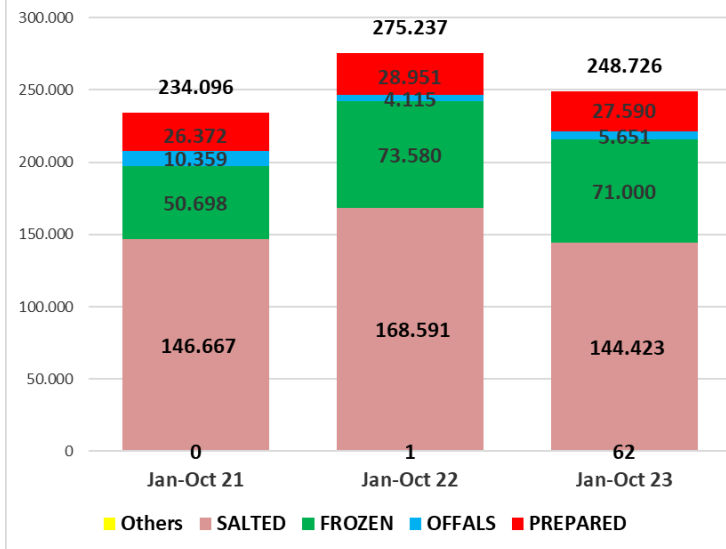
	2021		2022		Jan to Oct 2023		Compared to Jan to Oct 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
Brazil	388.472	29%	669.662	31%	518.633	29%	-6,5%
Ukraine	166.208	12%	324.836	15%	364.318	20%	+36,2%
United Kingdom	327.280	24%	368.063	17%	284.338	16%	-7,9%
Thailand	317.487	24%	519.225	24%	429.521	24%	+0,7%
China	95.081	7%	186.175	9%	158.681	9%	+2,0%
Chile	6.019	0%	1.537	0%	6.586	0%	+++
Bosnia-Herz.	10.345	1%	10.728	1%	7.503	0%	-20,7%
Argentina	6.508	0%	11.463	1%	7.102	0%	-24,1%
Switzerland	5.300	0%	8.975	0%	5.679	0%	-28,3%
Norway	7.914	1%	8.286	0%	7.350	0%	-0,3%
Tunisia	1.140	0%	1.702	0%	522	0%	-65,1%
Other Destinations	14.325	1%	17.358	1%	16.902	1%	+28,6%
Extra-EU	1.346.080		2.128.009		1.807.135		+2,5%
% Change			+58,1%				

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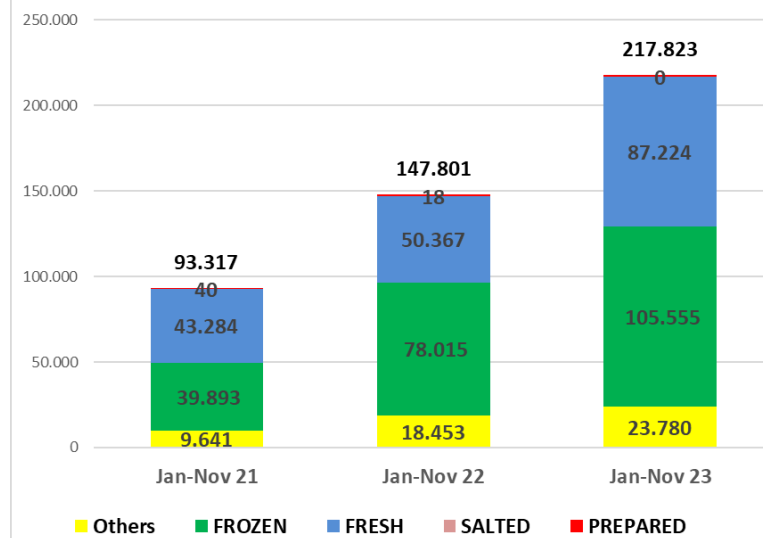
Imports of selected Poultry products



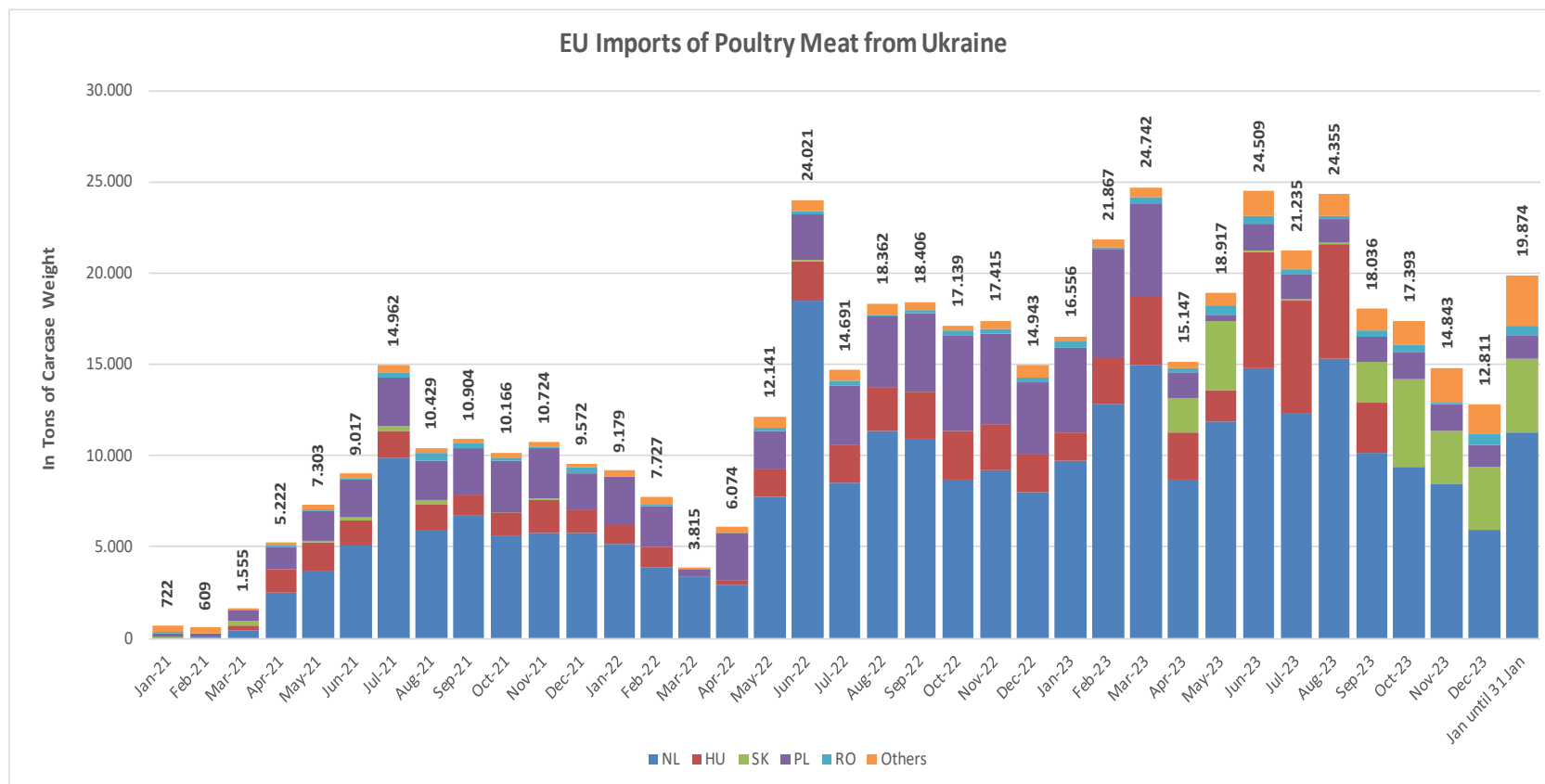
EU Imports of Poultry Meat from Brazil
(Tons of cwe)



EU Imports of Poultry Meat from Ukraine
(Tons of cwe)



EU-27 Imports of poultry meat from Ukraine



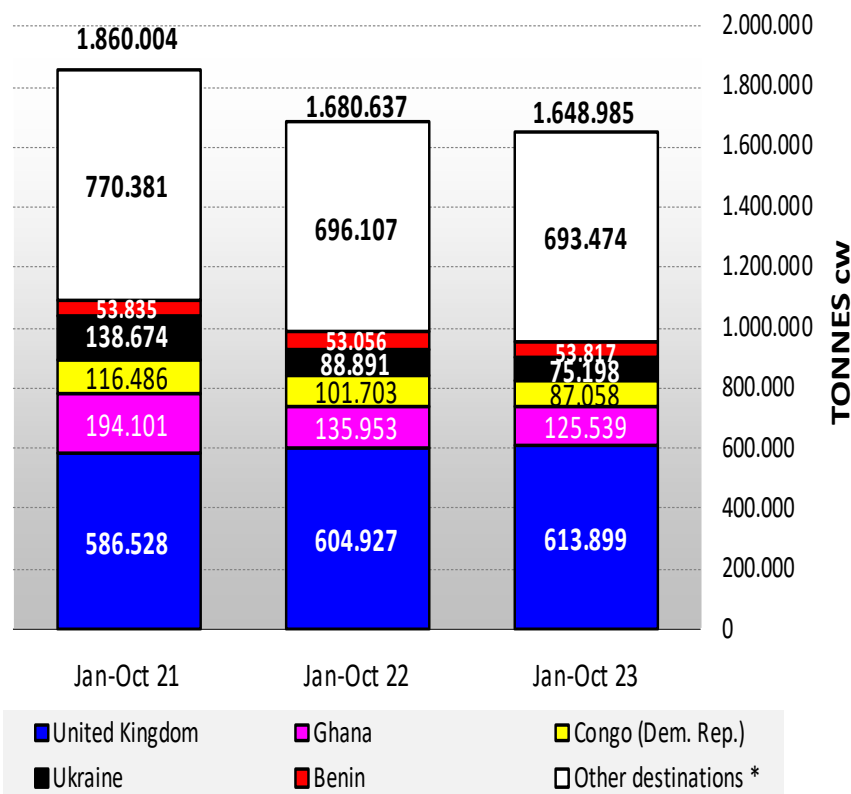
DG AGRI E3, source: **TAXUD surveillance**.

Please note that data is not completely stabilized for most recent periods.

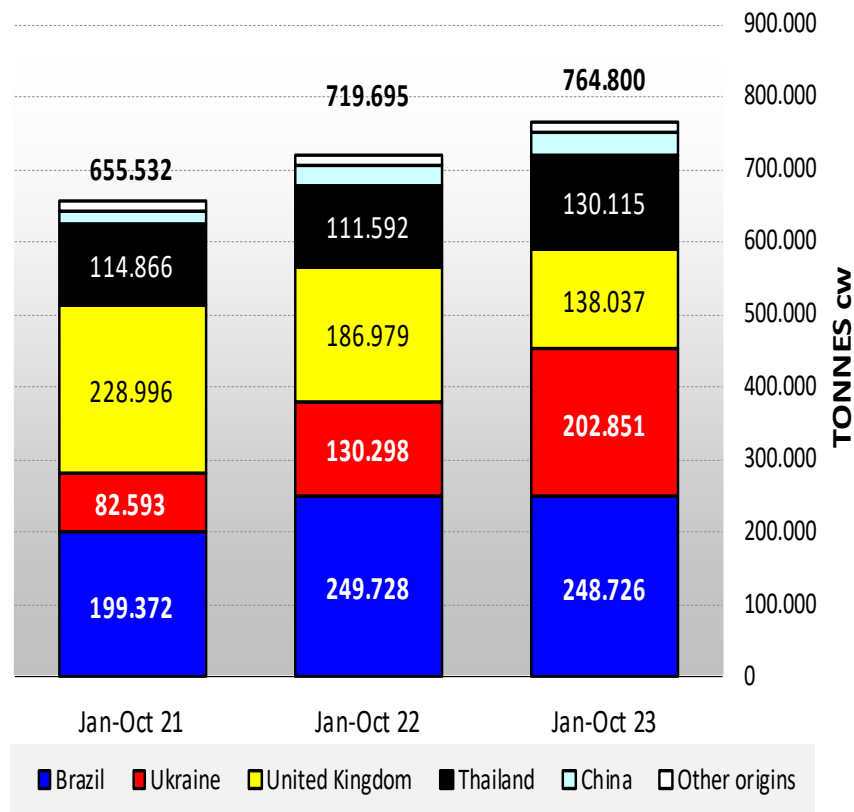
TRADE

EU EXPORTS vs IMPORTS

EU EXPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (TONNES cwe)

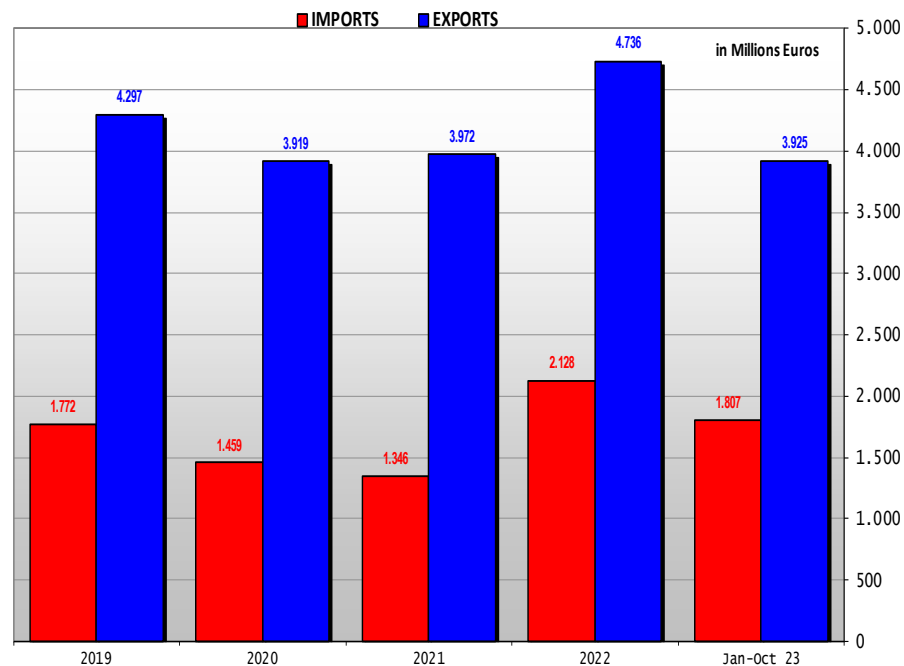
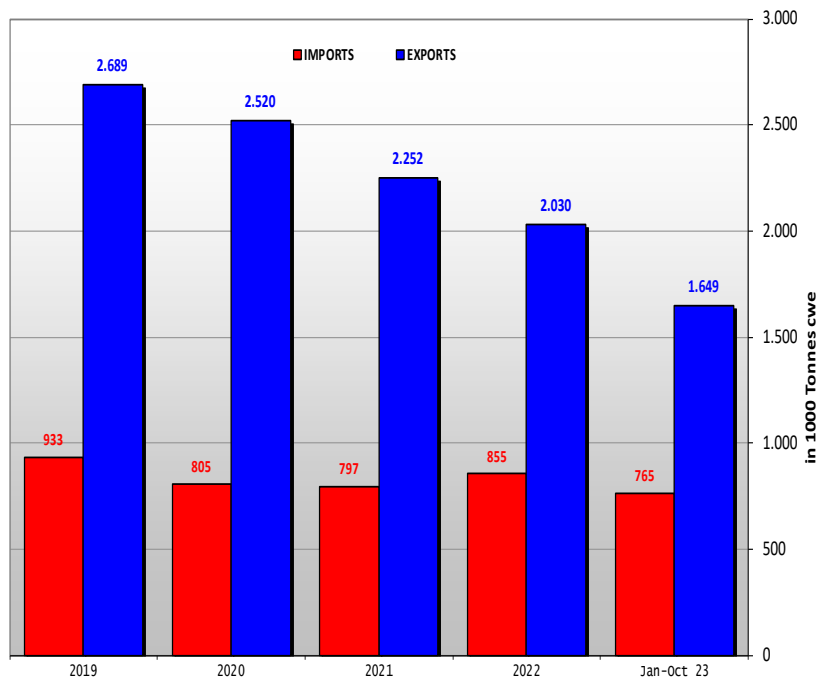


TRADE

BALANCE

in 1000 tonnes cwe

in million EUR



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>



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