

EU Market Situation for Poultry

**Civil Dialog Group on
Poultry & eggs**

16 July 2019

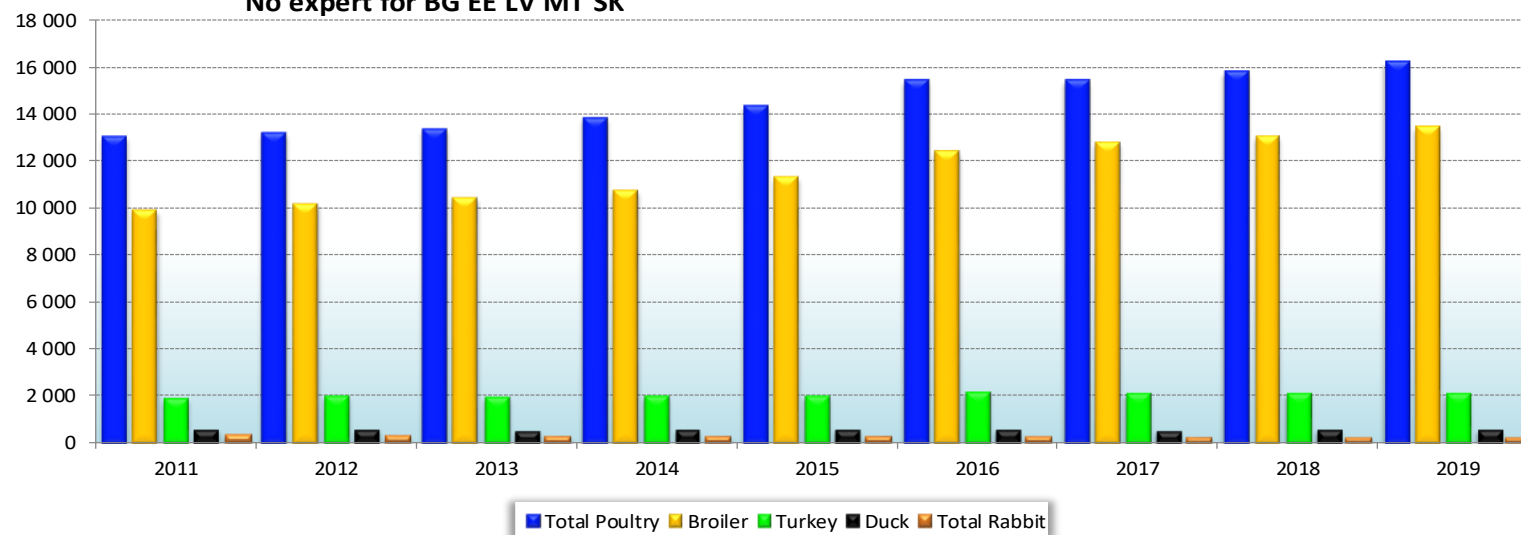


Experts EU production forecast on Poultry and Rabbit

Missing or incomplete data for BE EL LT NL

No expert for BG EE LV MT SK

Thousand Tons



	2011	2012	2013	2014	2015	2016	2017	2018	2019	% 2018/ 2017	% 2019/ 2018
Total Poultry	13 035	13 220	13 367	13 797	14 325	15 458	15 414	15 790	16 201	+ 2.4%	+ 2.6%
Broiler	9 932	10 173	10 445	10 729	11 295	12 403	12 766	13 055	13 449	+ 2.3%	+ 3.0%
Turkey	1 878	1 967	1 935	1 964	1 967	2 154	2 084	2 085	2 089	+ 0.1%	+ 0.2%
Duck	500	500	485	512	503	507	470	542	548	+ 15.2%	+ 1.2%
Total Rabbit	328	281	260	246	243	228	210	191	181	- 9.1%	- 5.3%

EU production of poultry (expert forecast Spring 2019)

Source : Experts WG

Qty in Tonnes

% change











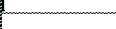






















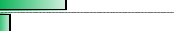






















	2017	2018	2019	%2018/2017	%2019/2018
PL	2 508 400	2 582 290	2 700 450	2.9	4.6
UK	1 837 800	1 937 100	1 960 200	5.4	1.2
FR	1 860 600	1 868 100	1 879 300	0.4	0.6
DE	1 801 600	1 817 900	1 850 800	0.9	1.8
ES	1 493 700	1 557 200	1 638 400	4.3	5.2
IT	1 354 000	1 314 000	1 357 000	-3.0	3.3
NL	1 118 000	1 119 000	1 119 000	0.1	0.0
HU	601 430	668 650	711 660	11.2	6.4
BE	410 000	424 800	435 400	3.6	2.5
RO	398 000	428 000	445 000	7.5	4.0
PT	337 400	341 700	342 000	1.3	0.1
IE	205 000	217 000	229 000	5.9	5.5
CZ	183 000	192 800	197 000	5.4	2.2
EL	192 000	192 000	192 000	0.0	0.0
SE	159 200	156 700	159 800	-1.6	2.0
DK	155 700	158 500	159 500	1.8	0.6
FI	128 790	135 286	141 500	5.0	4.6
LT	133 000	140 000	140 000	5.3	0.0
AT	131 390	131 960	134 370	0.4	1.8
BG	102 000	102 000	102 000	0.0	0.0
SK	86 000	86 000	86 000	0.0	0.0
HR	82 000	83 000	84 500	1.2	1.8
SI	68 020	68 840	68 260	1.2	-0.8
CY	25 290	25 580	25 790	1.1	0.8
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	15 414 320	15 790 406	16 200 930	2.4	2.6

EU production of broiler (expert forecast Spring 2019)

Source : Experts WG

Qty in Tonnes

% change



















	2017	2018	2019	%2018/2017		%2019/2018	
PL	2 055 000	2 115 000	2 220 000		2.9		5.0
UK	1 660 100	1 749 900	1 787 800		5.4		2.2
DE	1 369 500	1 412 000	1 440 000		3.1		2.0
ES	1 270 000	1 320 000	1 400 000		3.9		6.1
FR	1 246 000	1 247 000	1 263 000		0.1		1.3
NL	1 100 000	1 100 000	1 100 000		0.0		0.0
IT	1 034 000	1 001 000	1 040 000		-3.2		3.9
HU	408 400	414 200	447 500		1.4		8.0
BE	403 000	417 500	427 900		3.6		2.5
RO	388 000	413 000	430 000		6.4		4.1
PT	287 000	289 000	289 000		0.7		0.0
IE	180 000	190 000	200 000		5.6		5.3
EL	185 000	185 000	185 000		0.0		0.0
CZ	164 800	170 000	175 000		3.2		2.9
SE	159 200	156 700	159 800		-1.6		2.0
DK	153 800	157 300	158 000		2.3		0.4
FI	120 780	127 156	133 000		5.3		4.6
LT	123 000	130 000	130 000		5.7		0.0
AT	108 370	109 590	112 000		1.1		2.2
SK	80 100	80 100	80 100		0.0		0.0
BG	75 000	75 000	75 000		0.0		0.0
HR	69 000	69 000	70 000		0.0		1.4
SI	62 860	63 410	62 180		0.9		-1.9
CY	25 100	25 400	25 600		1.2		0.8
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	12 766 190	13 055 436	13 449 060		2.3		3.0

EU production of turkey (expert forecast Spring 2019)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019		%2018/2017	%2019/2018
PL	376 000	384 000	393 000		2.1	2.3
DE	386 800	359 900	365 000		-7.0	1.4
FR	368 500	357 300	348 000		-3.0	-2.6
IT	309 000	301 000	305 000		-2.6	1.3
ES	220 000	234 000	235 000		6.4	0.4
UK	147 100	156 800	143 200		6.6	-8.7
HU	96 780	97 670	102 000		0.9	4.4
PT	40 300	42 100	42 500		4.5	1.0
IE	25 000	27 000	29 000		8.0	7.4
NL	28 000	28 000	28 000		0.0	0.0
AT	22 370	22 370	22 370		0.0	0.0
RO	10 000	15 000	15 000		50.0	0.0
HR	12 500	13 500	14 000		8.0	3.7
CZ	6 500	10 100	10 000		55.4	-1.0
FI	8 010	8 130	8 500		1.5	4.6
BE	7 000	7 300	7 500		4.3	2.7
SI	5 160	5 430	6 080		5.2	12.0
LT	5 300	5 500	5 500		3.8	0.0
SE	5 000	5 500	5 500		10.0	0.0
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	190	180	190		-5.3	5.6
BG	100	100	100		0.0	0.0
LV						
EE						
MT						
EU	2 083 610	2 084 880	2 089 440		0.1	0.2

EU production of duck (expert forecast Spring 2019)

Source : Experts WG

Qty in Tonnes

% change

	2017	2018	2019	%2018/2017	%2019/2018
FR	203 700	220 300	224 000	8.1	1.7
HU	68 000	122 900	124 680	80.7	1.4
PL	47 850	44 960	47 450	-6.0	5.5
DE	40 500	41 200	41 000	1.7	-0.5
UK	30 600	30 400	29 200	-0.7	-3.9
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	12 200	11 500	9.9	-5.7
PT	10 100	10 600	10 500	5.0	-0.9
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	3 400	-13.5	6.3
DK	1 900	1 200	1 500	-36.8	25.0
SK	600	600	600	0.0	0.0
HR	500	500	500	0.0	0.0
AT	140	140	140	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					
EU	470 095	541 505	547 775	15.2	1.2

EU production of rabbit (expert forecast Spring 2019)

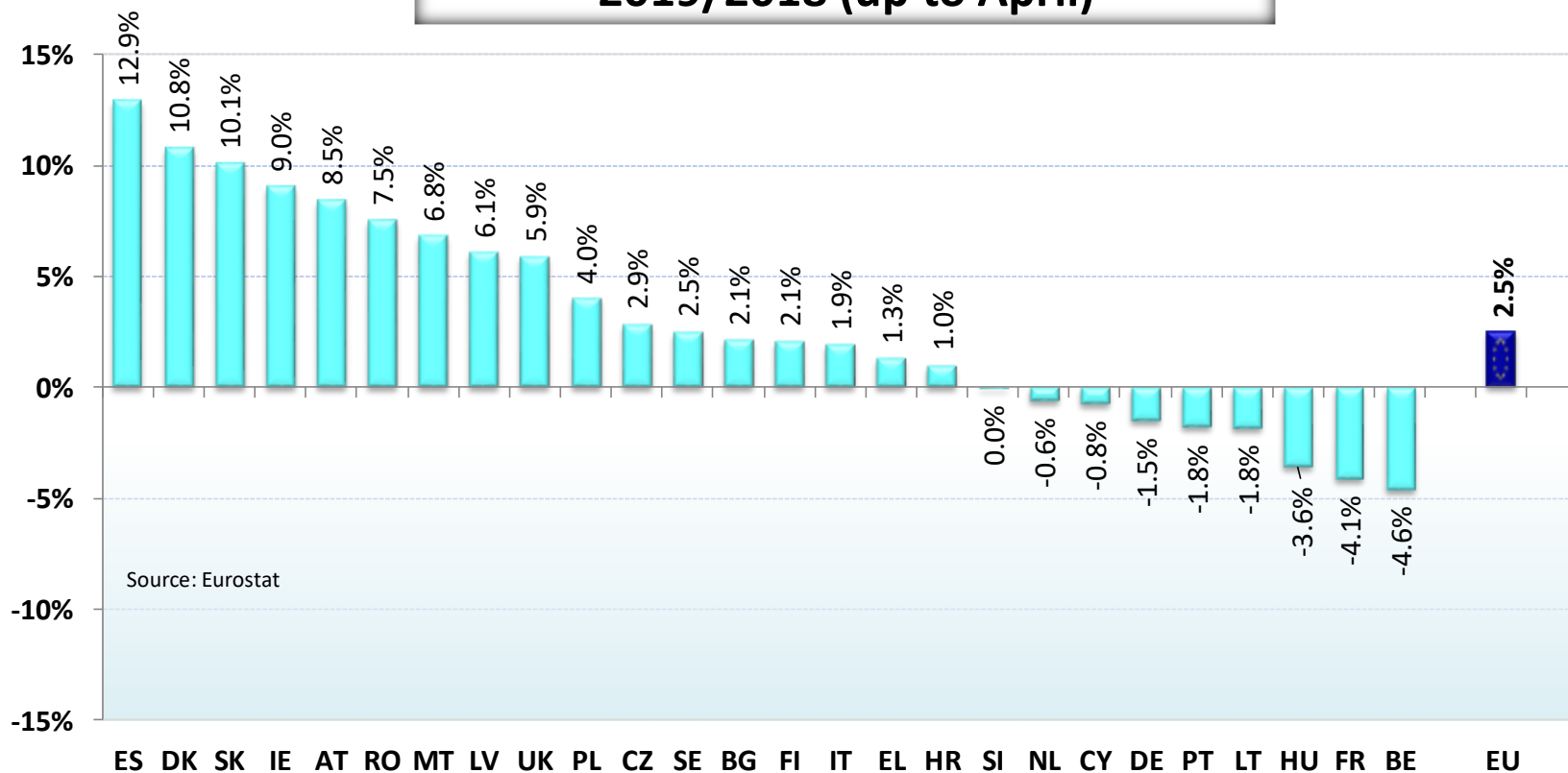
Source : Experts WG

Qty in Tonnes

% change

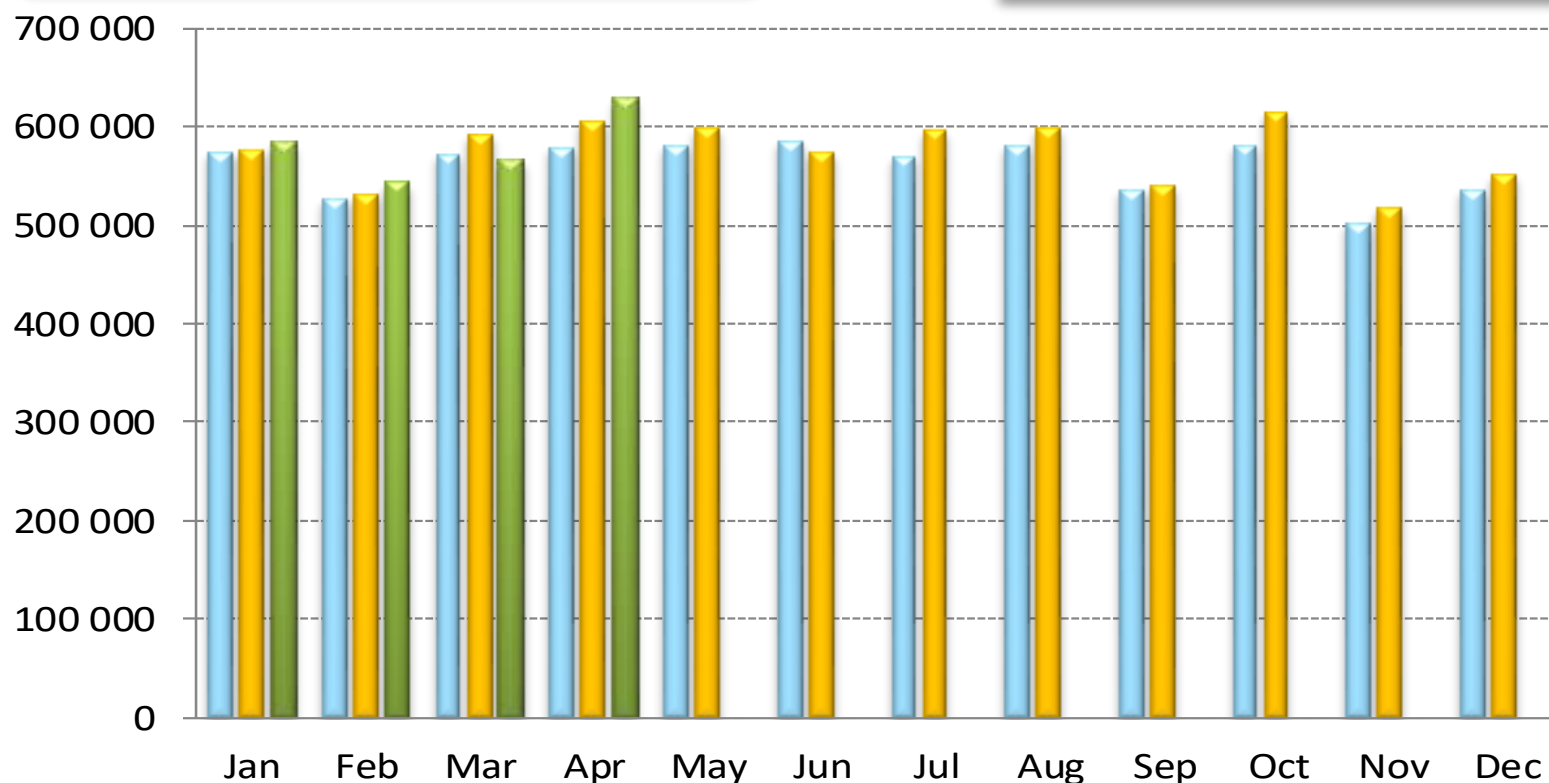
	2017	2018	2019	%2018/2017	%2019/2018
ES	57 300	53 100	50 000	-7.3	-5.8
FR	61 000	50 000	45 000	-18.0	-10.0
IT	44 000	40 000	38 000	-9.1	-5.0
PL	24 000	24 000	24 000	0.0	0.0
CZ	9 100	9 100	9 100	0.0	0.0
PT	5 700	5 800	5 800	1.8	0.0
EL	5 000	5 000	5 000	0.0	0.0
SK	3 600	3 600	3 600	0.0	0.0
CY	560	570	580	1.8	1.8
BE	30	30	30	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	210 292	191 202	181 112	-9.1	-5.3

Change in Poultry Meat Production in % 2019/2018 (up to April)

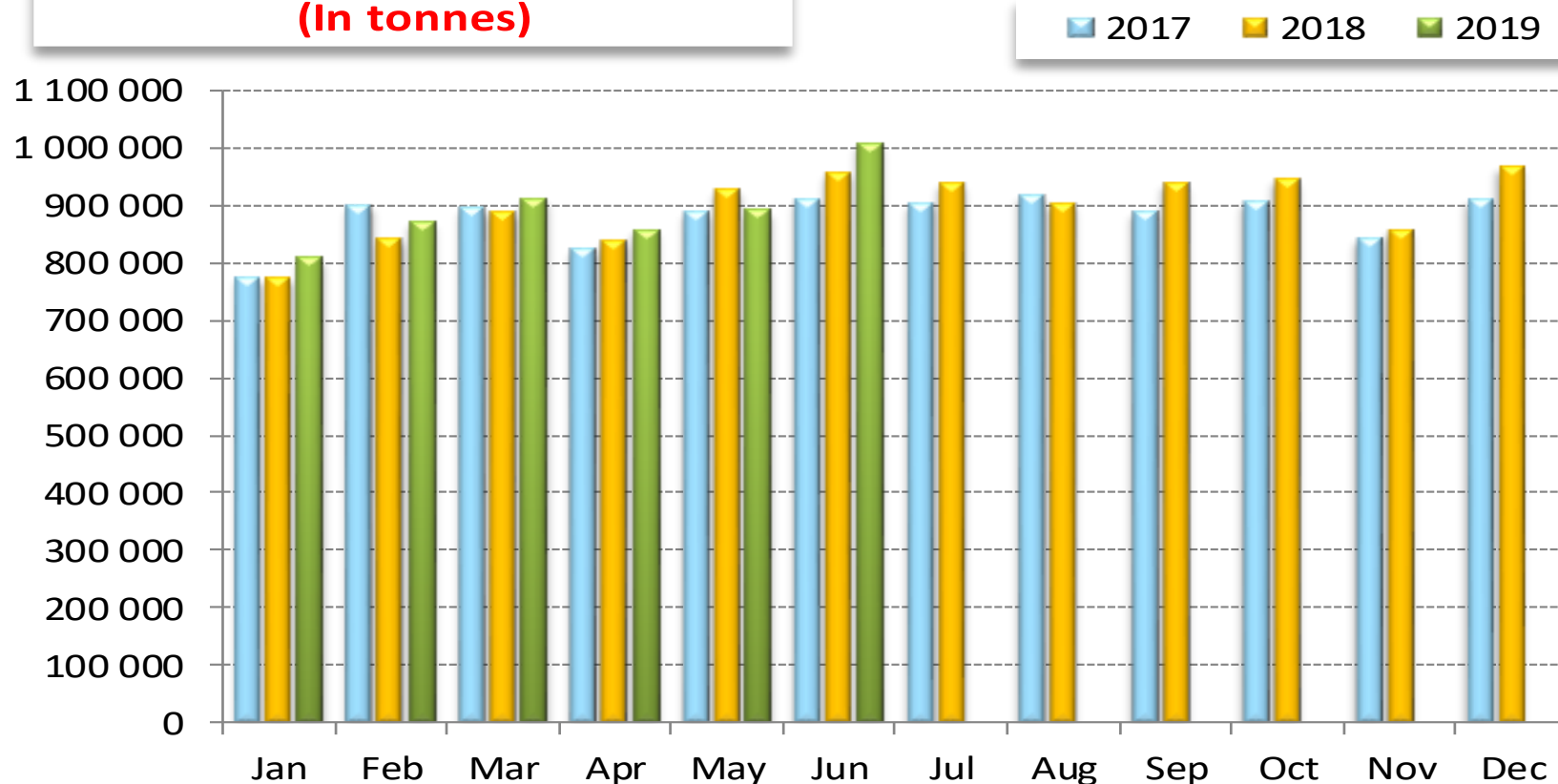


Chicks hatched for fattening (1 000 pieces)

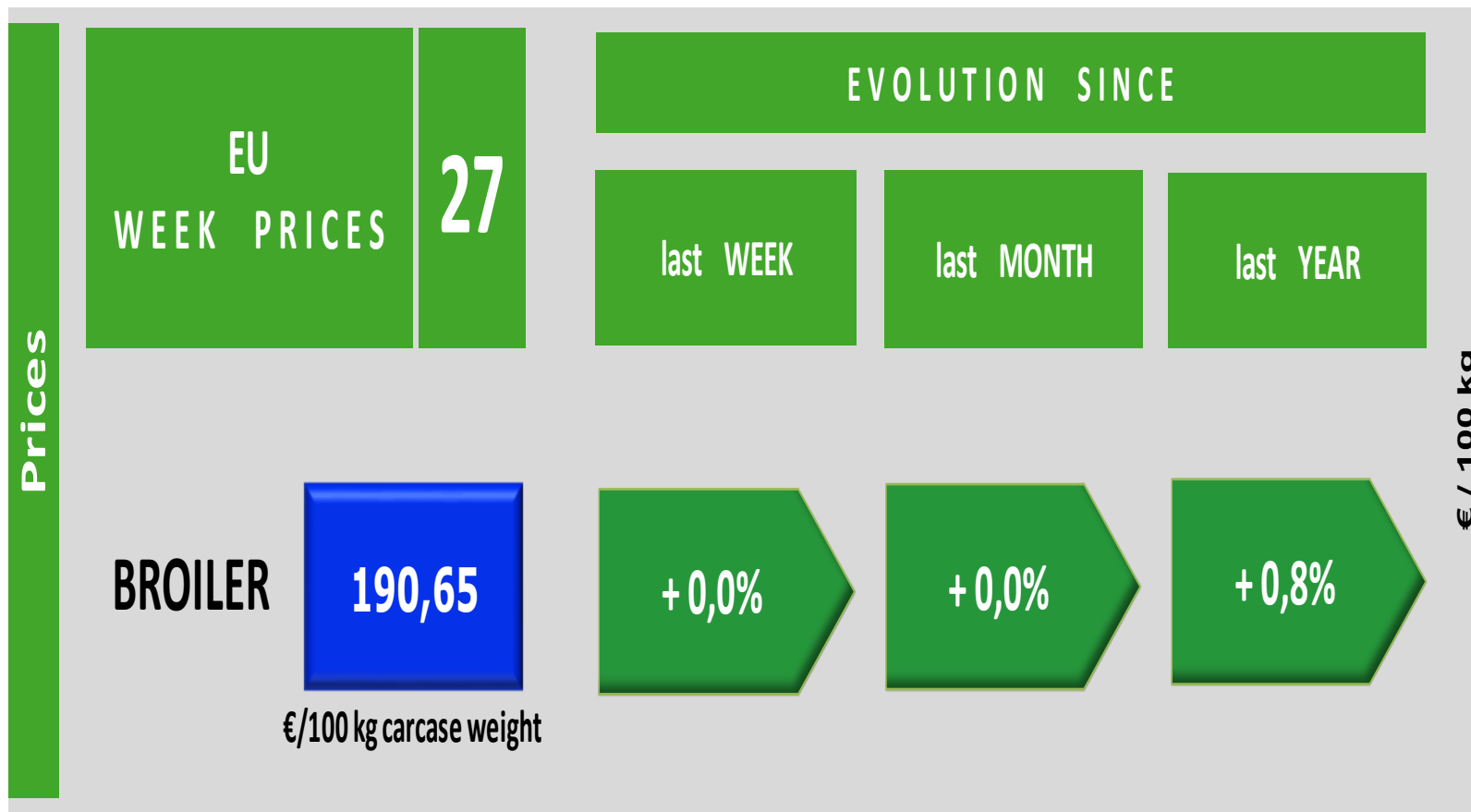
2017 2018 2019



Production forecast of broiler (In tonnes)

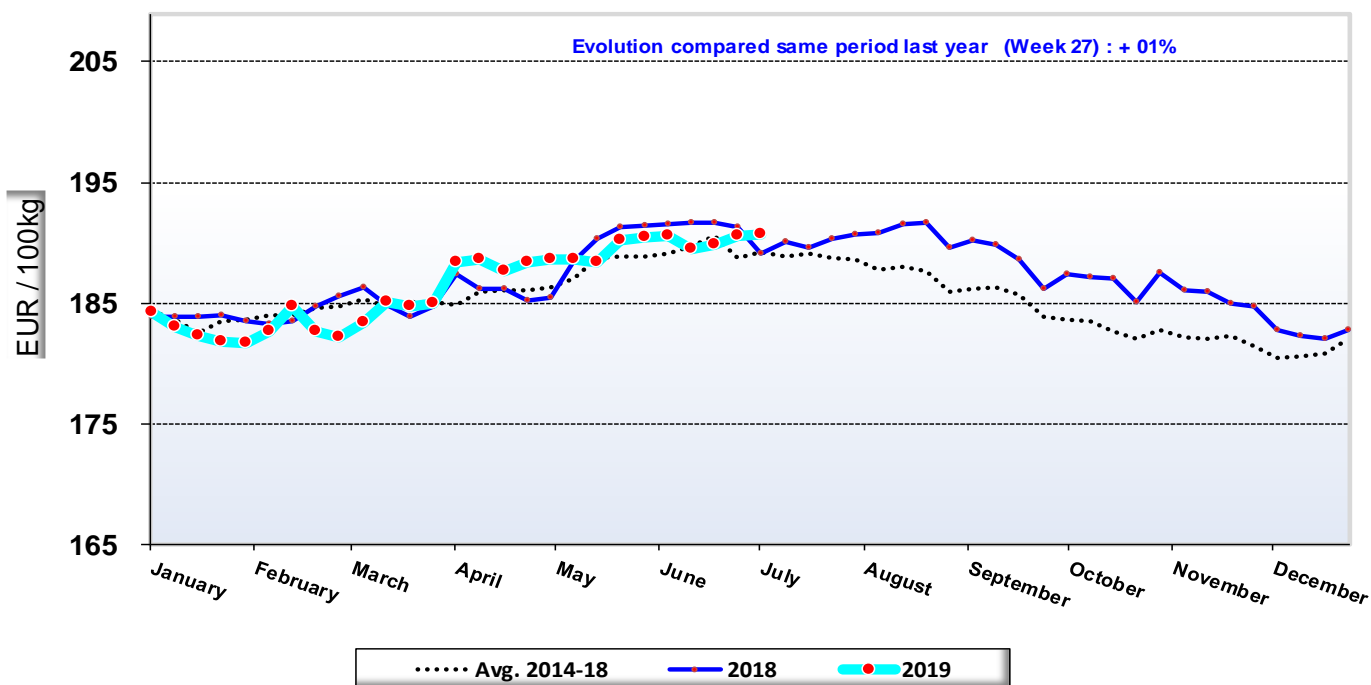


PRICES



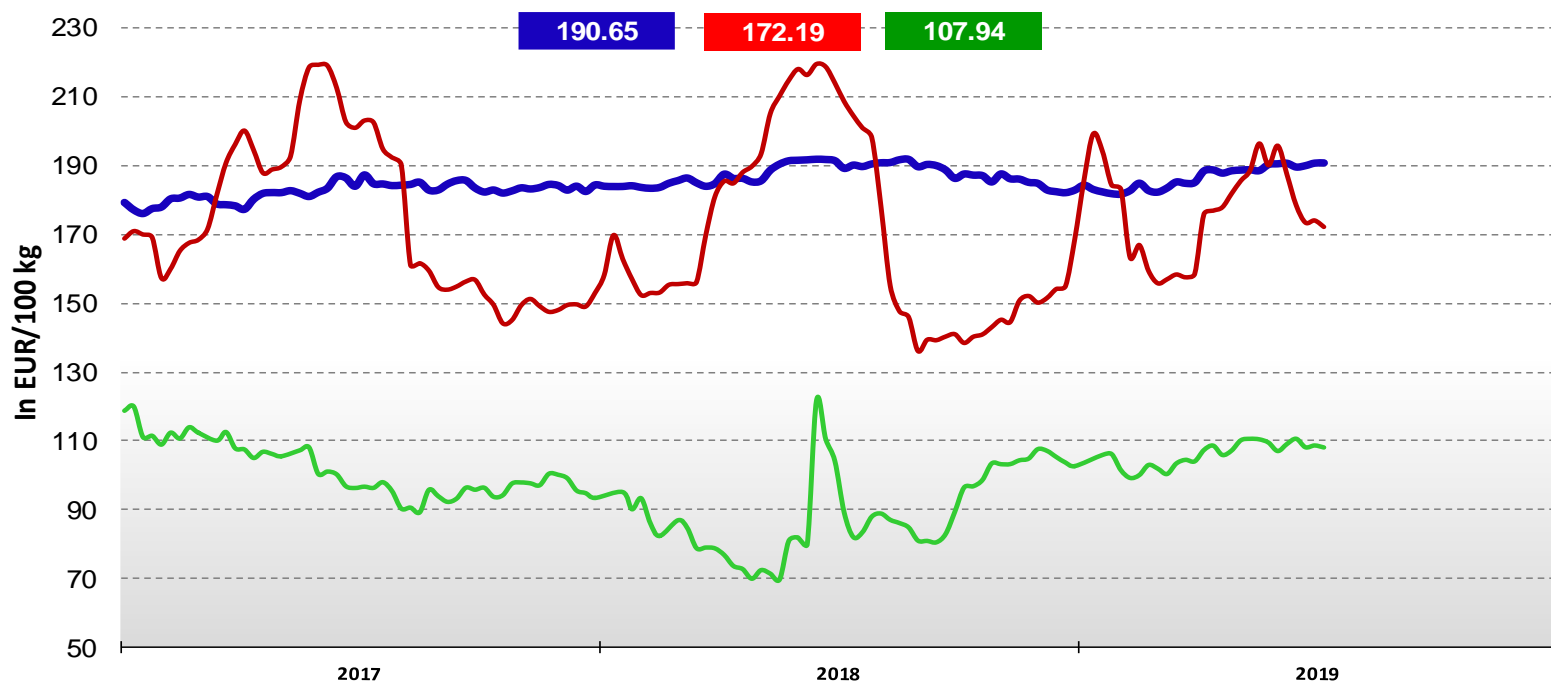
Evolution of the weekly EU average price for **Broiler**

Latest price ==> 191 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 = CEPEA/ESALQ chilled chicken prices - São Paulo State

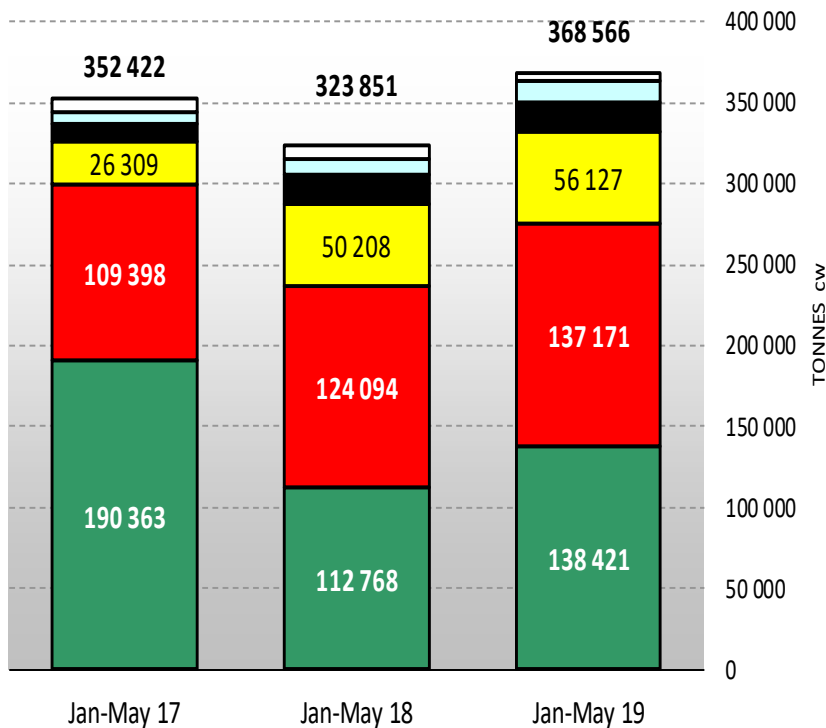
— EU — US — BR

Imports of Poultry meat from selected origins

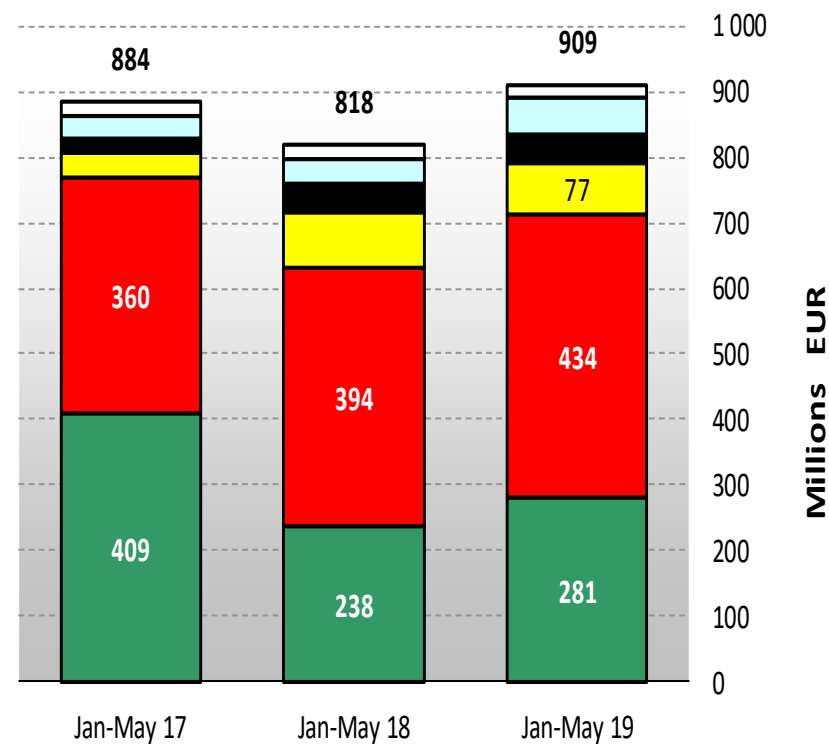
	2015		2016		2017		2018		Jan-May 19		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-May 18
Brazil	501 328	57.3%	504 814	55.9%	401 598	49.7%	302 207	37.2%	138 421	37.6%	+ 23%
Thailand	274 524	31.4%	290 602	32.2%	265 927	32.9%	311 468	38.3%	137 171	37.2%	+ 11%
Ukraine	42 513	4.9%	48 103	5.3%	80 128	9.9%	123 664	15.2%	56 127	15.2%	+ 12%
Chile	22 232	2.5%	28 809	3.2%	24 972	3.1%	35 954	4.4%	18 260	5.0%	- 3%
China	18 384	2.1%	16 951	1.9%	19 107	2.4%	24 526	3.0%	13 160	3.6%	+ 36%
Argentina	8 529	1.0%	6 491	0.7%	6 297	0.8%	7 352	0.9%	2 844	0.8%	- 28%
Switzerland	2 424	0.3%	2 548	0.3%	2 736	0.3%	2 901	0.4%	1 195	0.3%	- 9%
Israel	1 285	0.1%	1 487	0.2%	1 170	0.1%	1 063	0.1%	564	0.2%	+ 21%
Others	3 699	0.4%	2 507	0.3%	5 320	0.7%	4 054	0.5%	825	0.2%	
Extra-EU	874 919		902 313		807 254		813 189		368 566		
% change			+ 3.1%		- 10.5%		+ 0.7%		+ 13.8%		

EU poultry meat imports (by origin)

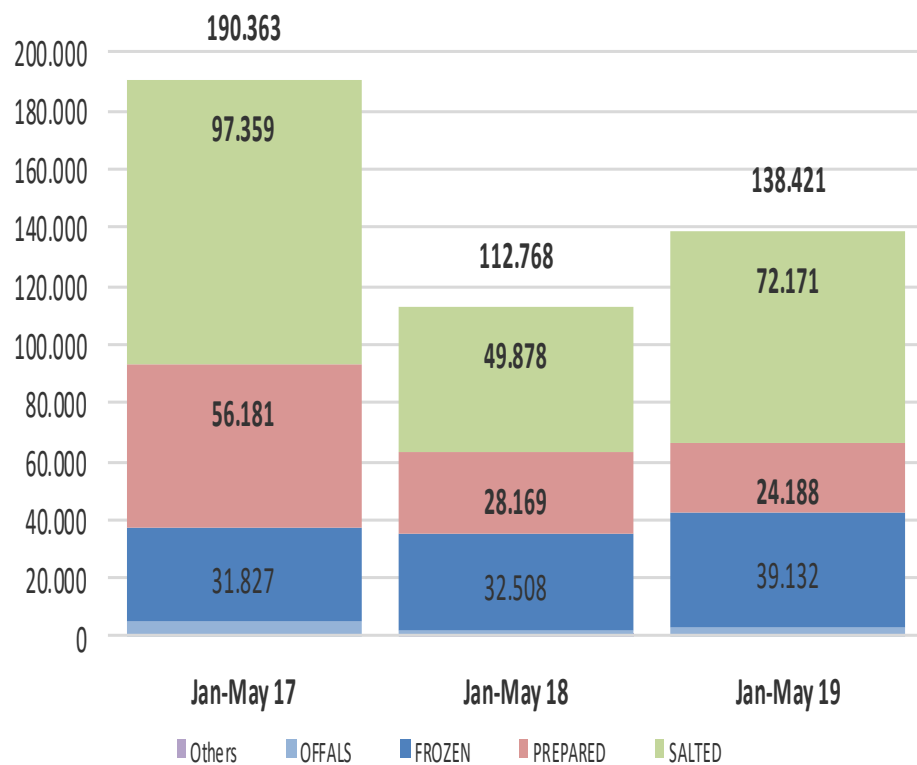
EU IMPORTS of Poultry Meat (TONNES cwe)



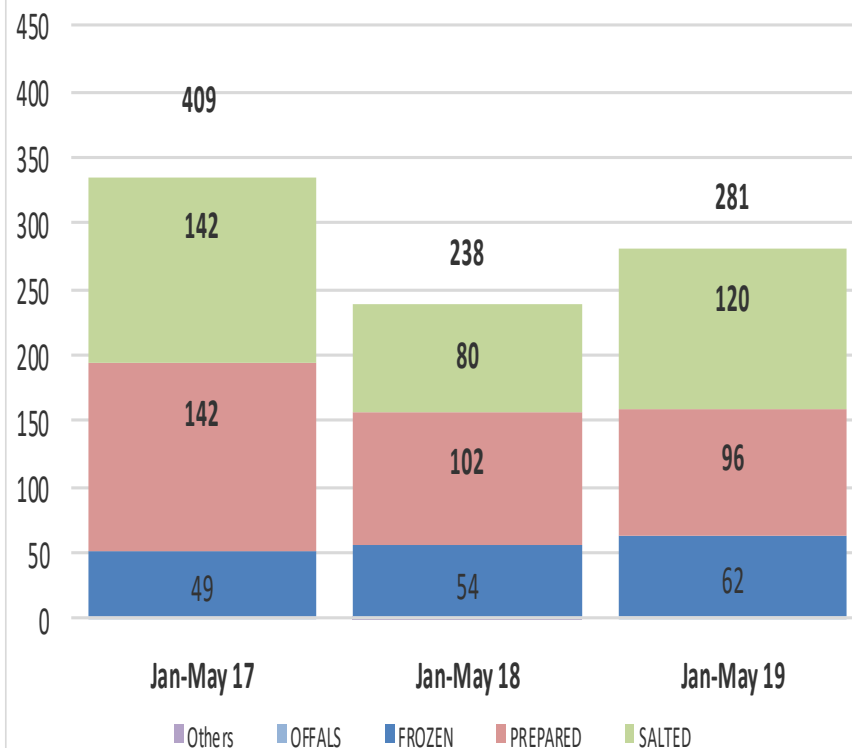
EU IMPORTS of Poultry Meat (Millions EUR)



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

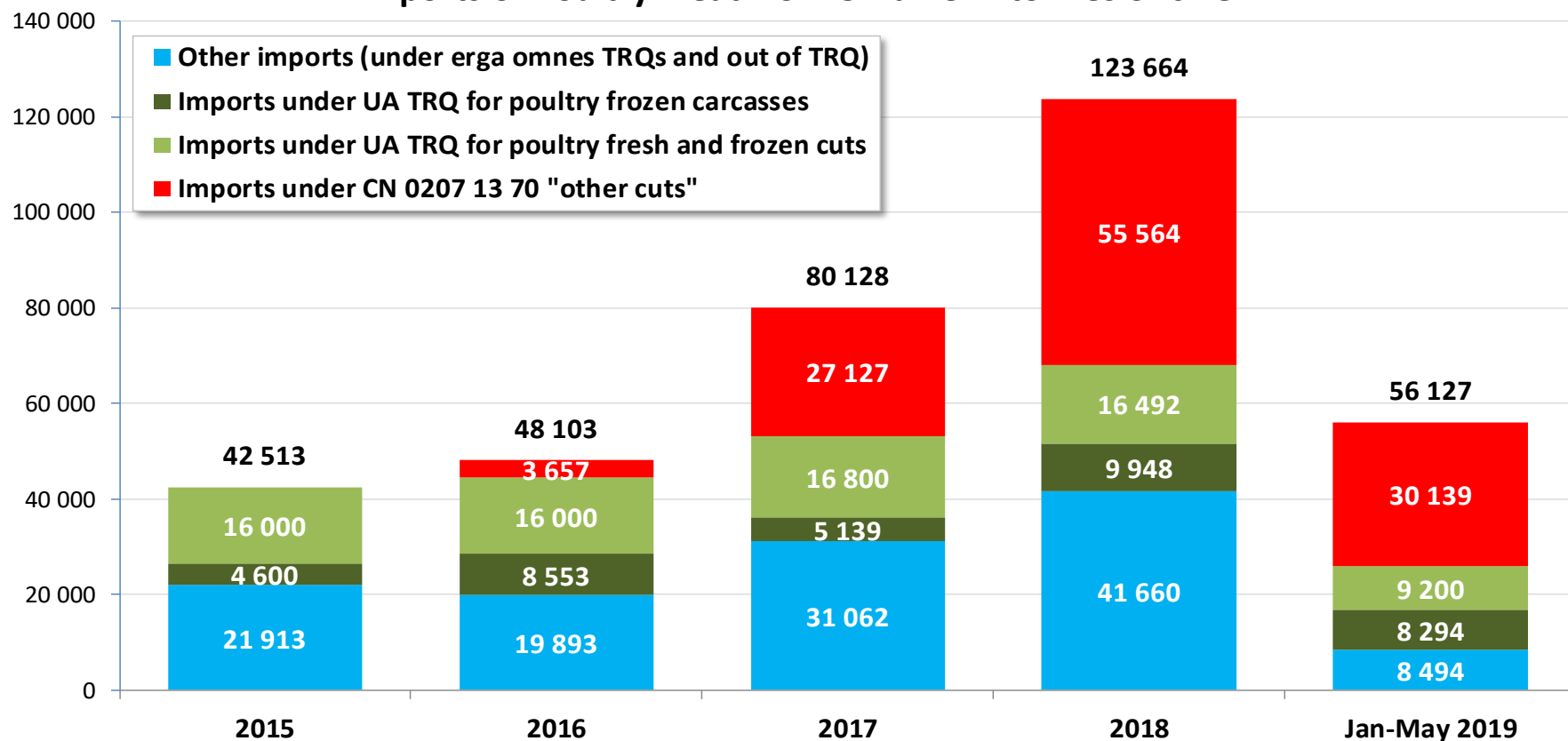


Eu Imports of Poultry Meat from Brazil (Million Euros)



Imports from UA under CN 0207 13 70 growing exponentially since 2017

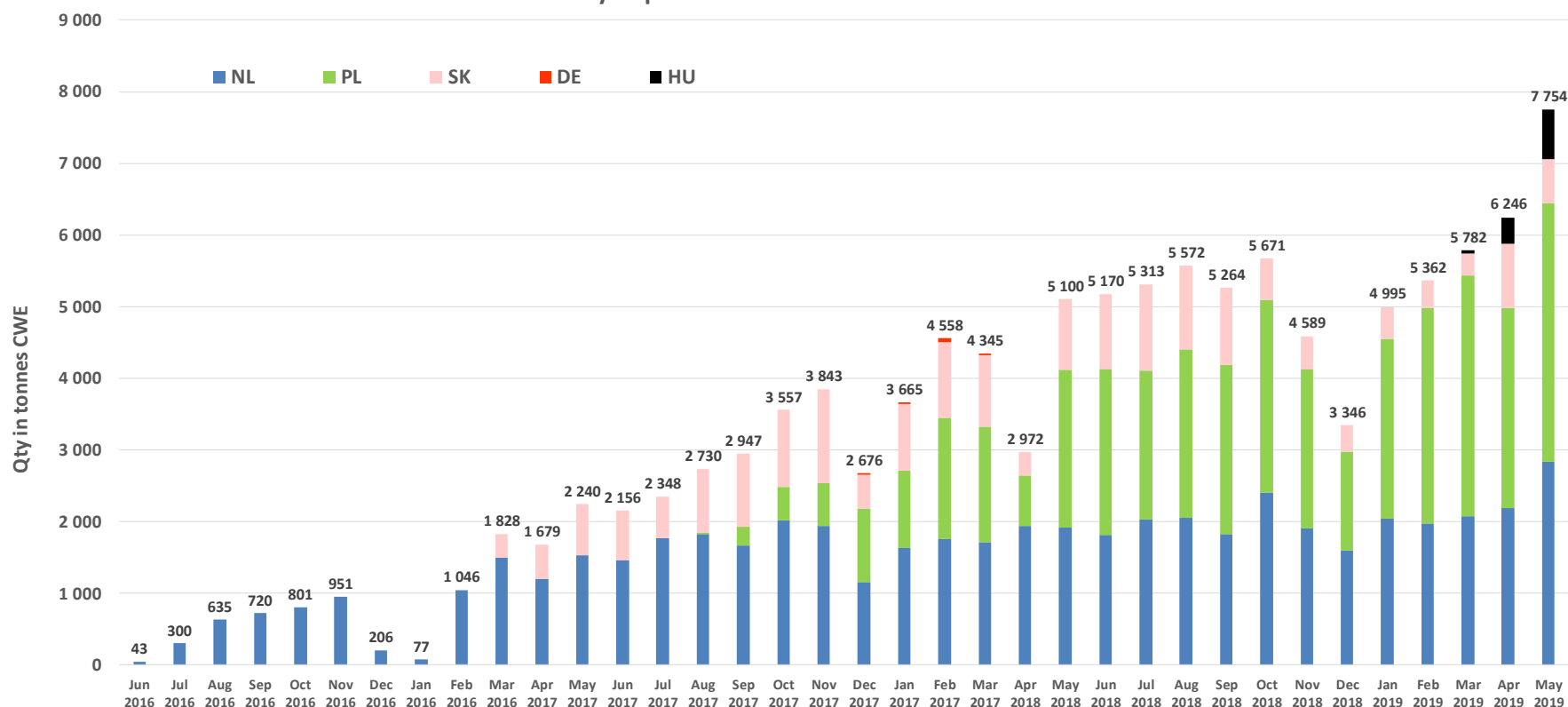
Imports of Poultry meat from Ukraine in tonnes of cwe



Source : EUROSTAT Comext

Monthly imports from UA under CN 0207 1370 rebound again this year expanding into new destinations

Monthly imports from Ukraine under CN 2071370



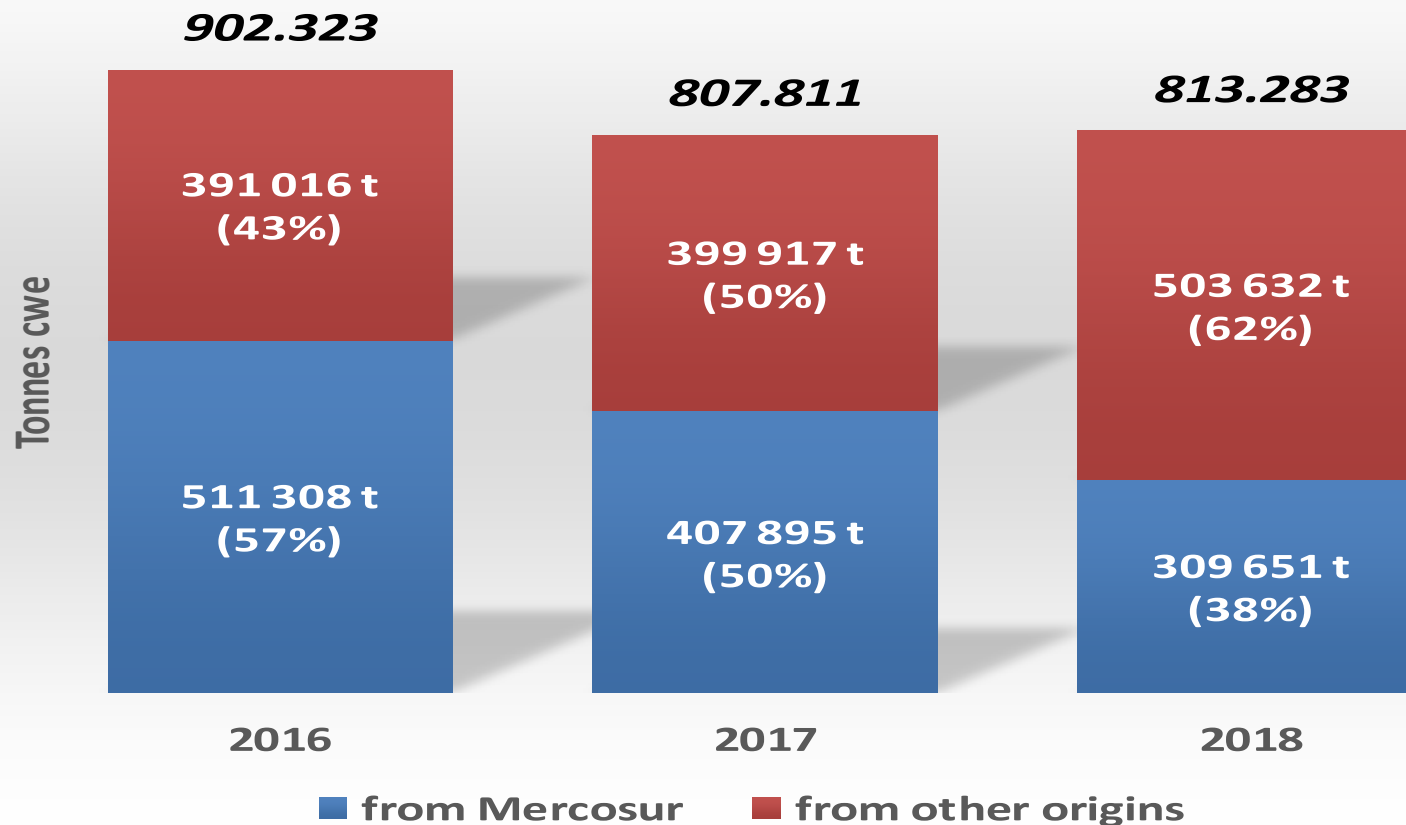
Source: Comext

EU-Mercosur agreement on poultry

- *The agreement in principle foresees a poultry TRQ of 180 000 tonnes (carcass weight equivalent) duty free, subdivided into 50% bone-in and 50% boneless.*
- *The volume will be phased in during 5 years.*

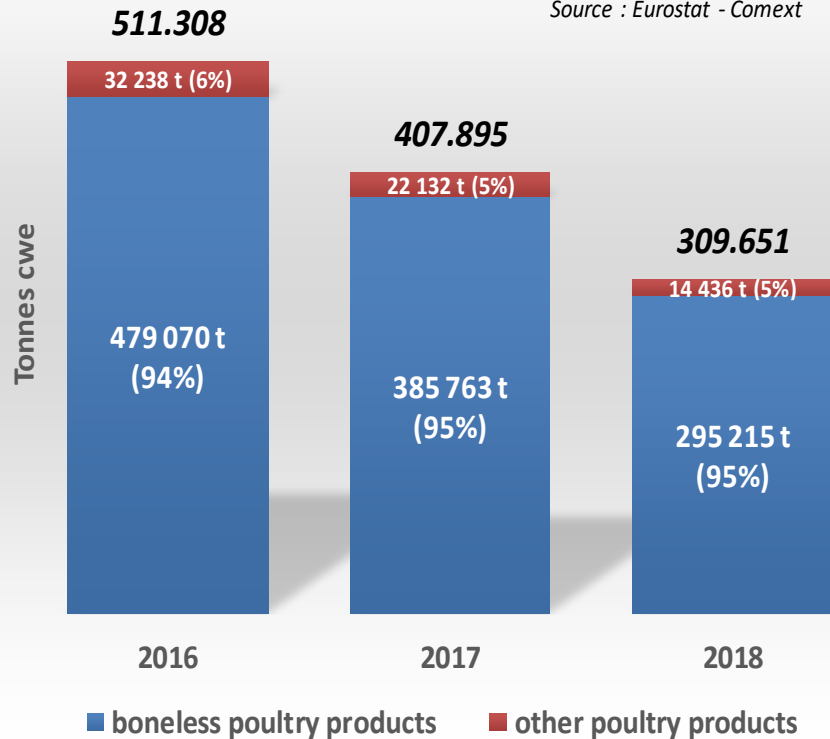
EU poultry imports by origin

Source : Eurostat - Comext



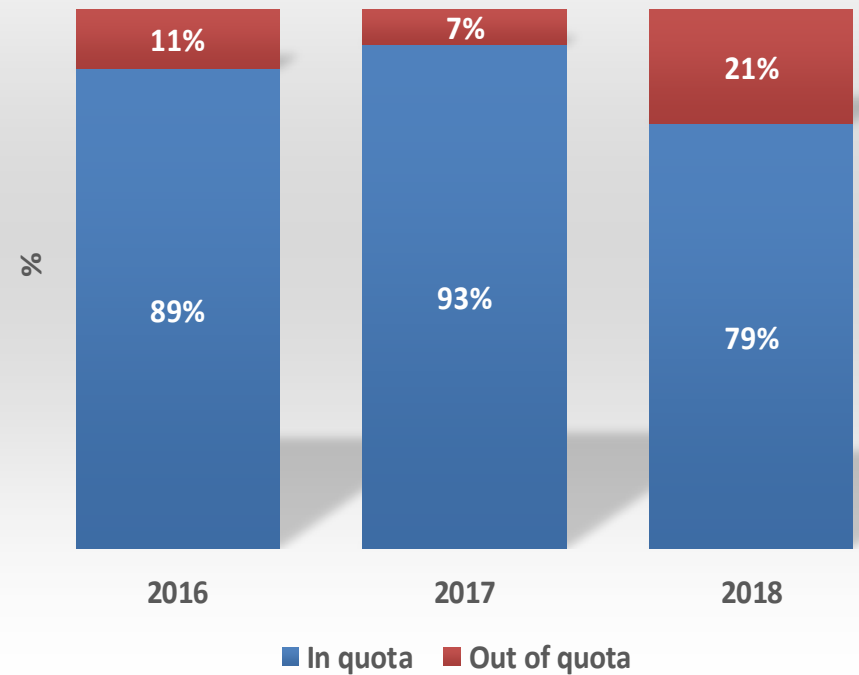
EU poultry imports from Mercosur by product category

Source : Eurostat - Comext



EU poultry imports from Mercosur by import regime

Source : Taxud - Surveillance

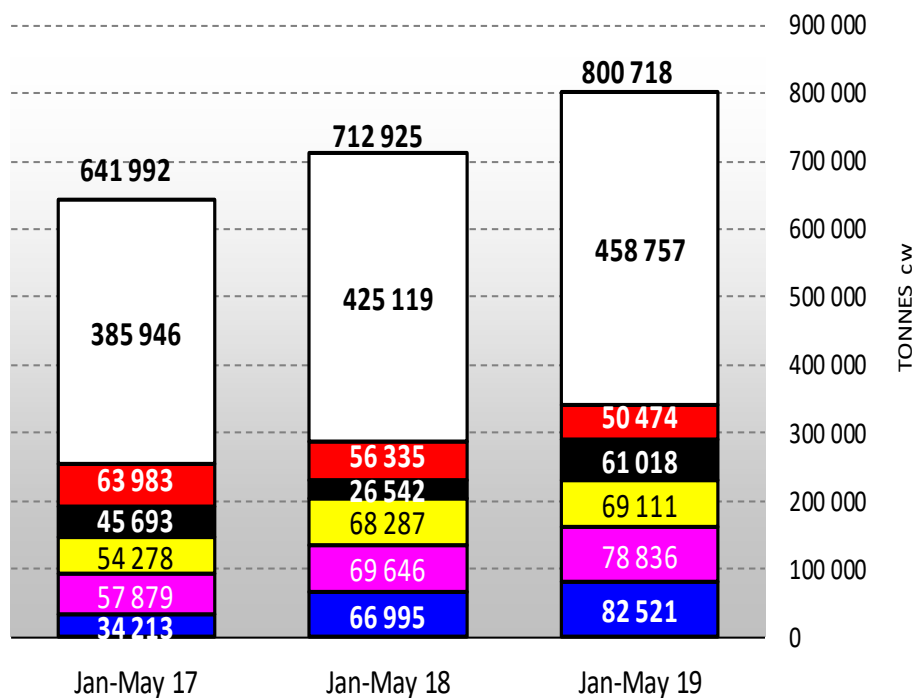


Exports of Poultry Meat to Selected Destinations

	2015		2016		2017		2018		Jan-May 19		Compared to Jan-May 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Philippines	100 644	6.7%	126 694	7.5%	127 788	7.6%	168 887	9.5%	82 521	10.3%	+ 23%
Ghana	81 025	5.4%	115 783	6.9%	146 958	8.8%	166 002	9.3%	78 836	9.8%	+ 13%
Ukraine	90 851	6.0%	114 841	6.8%	162 627	9.7%	178 158	10.0%	69 111	8.6%	+ 1%
South Africa	214 951	14.3%	282 770	16.8%	78 490	4.7%	84 518	4.7%	61 018	7.6%	+ 130%
Hong Kong	101 008	6.7%	123 855	7.4%	148 135	8.9%	127 837	7.2%	50 474	6.3%	- 10%
Vietnam	27 128	1.8%	36 292	2.2%	53 329	3.2%	88 669	5.0%	47 760	6.0%	+ 38%
Benin	139 324	9.2%	120 685	7.2%	105 709	6.3%	92 574	5.2%	45 152	5.6%	+ 19%
Saudi Arabia	142 496	9.4%	121 645	7.2%	98 788	5.9%	82 554	4.6%	29 634	3.7%	- 35%
Congo (Dem. Rep.)	35 849	2.4%	46 260	2.8%	60 080	3.6%	75 986	4.3%	25 810	3.2%	+ 7%
Gabon	37 877	2.5%	32 340	1.9%	49 183	2.9%	45 051	2.5%	15 168	1.9%	- 24%
Russia	1 223	0.1%	1 108	0.1%	996	0.1%	910	0.1%	210	0.0%	+ 0%
Other Destinations	535 694	35.5%	556 990	33.2%	638 833	38.2%	668 335	37.6%	295 023	36.8%	
Extra-EU	1 508 071		1 679 264		1 670 917		1 779 481		800 718		
% change			+ 11.4%		- 0.5%		+ 6.5%		+ 12.3%		

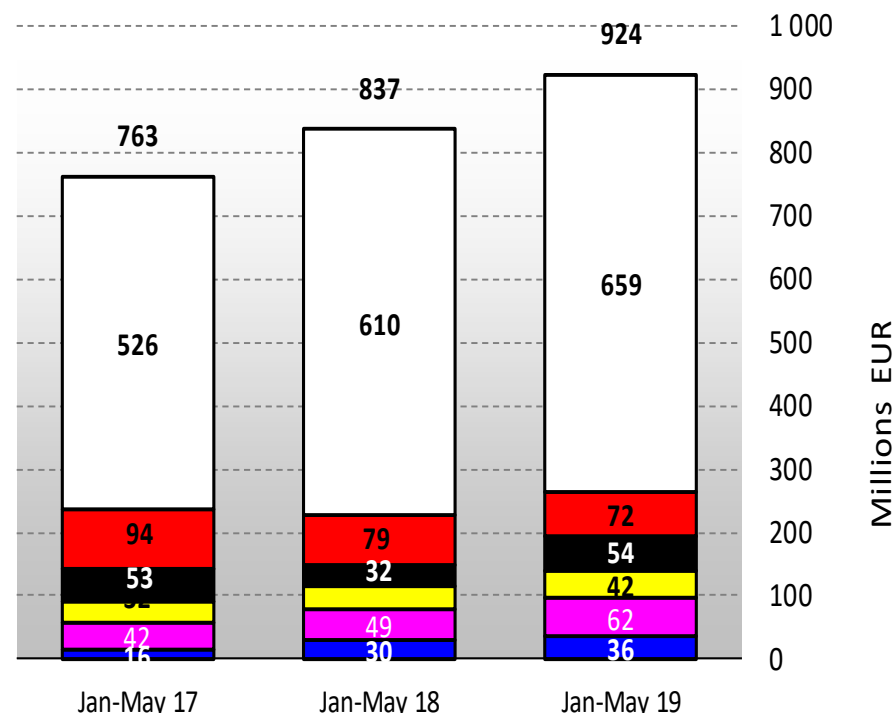
EU poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



■ Philippines ■ Ghana ■ Ukraine ■ South Africa ■ Hong Kong ■ Other destinations *

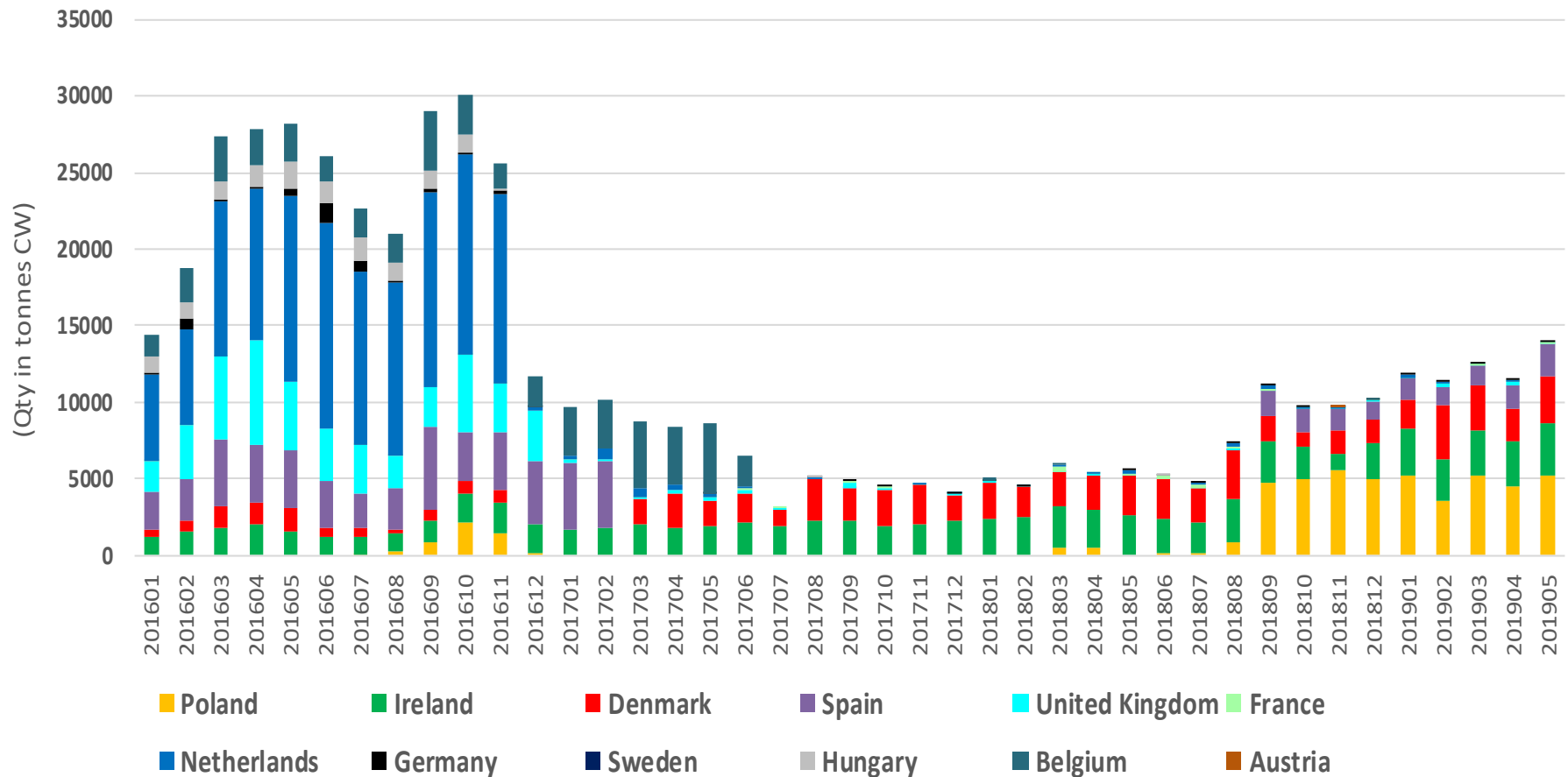
EU EXPORTS of Poultry Meat (Millions EUR)



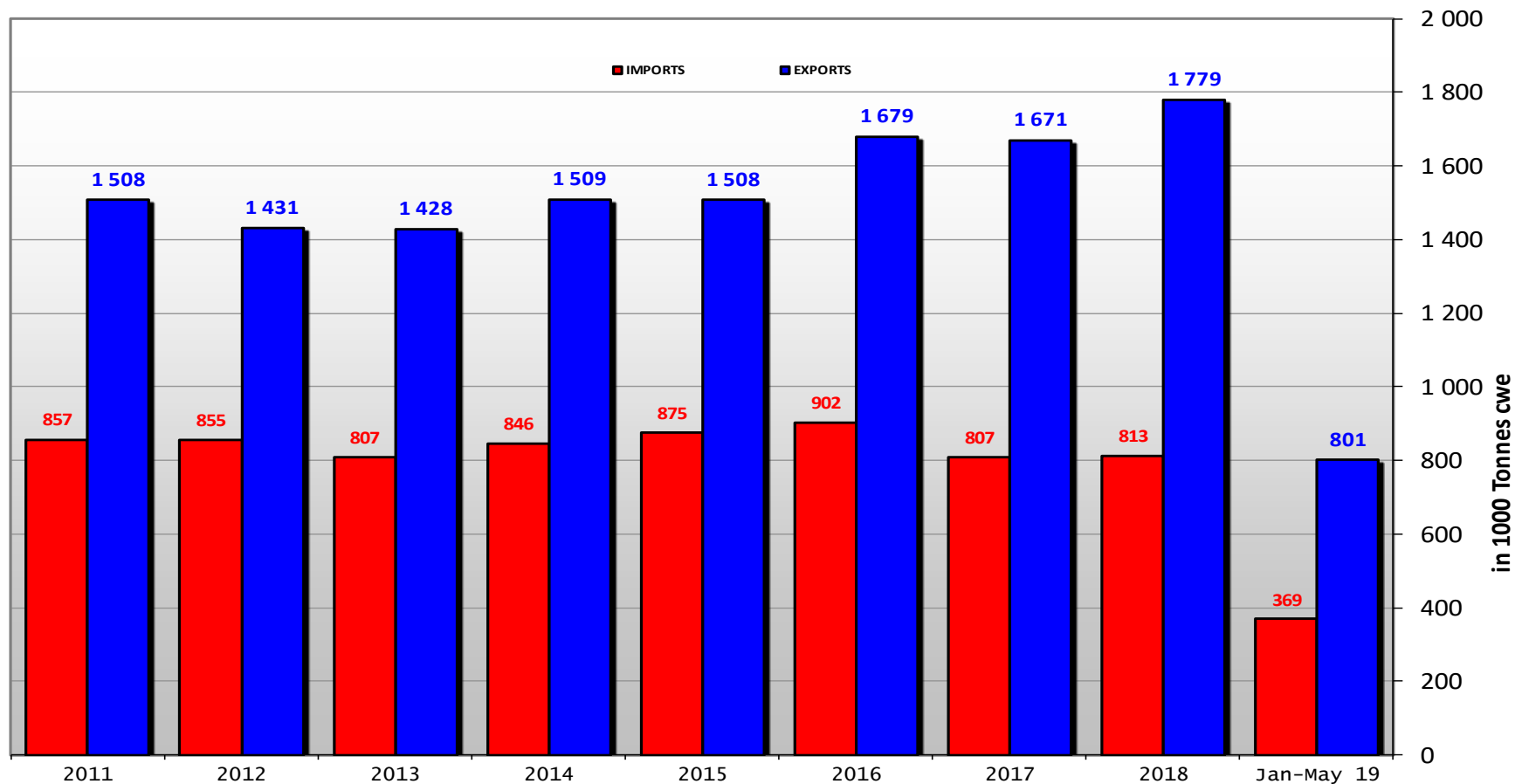
■ Philippines ■ Ghana ■ Ukraine ■ South Africa ■ Hong Kong ■ Other destinations *

* countries trading less than 925 ('Millions EUR)

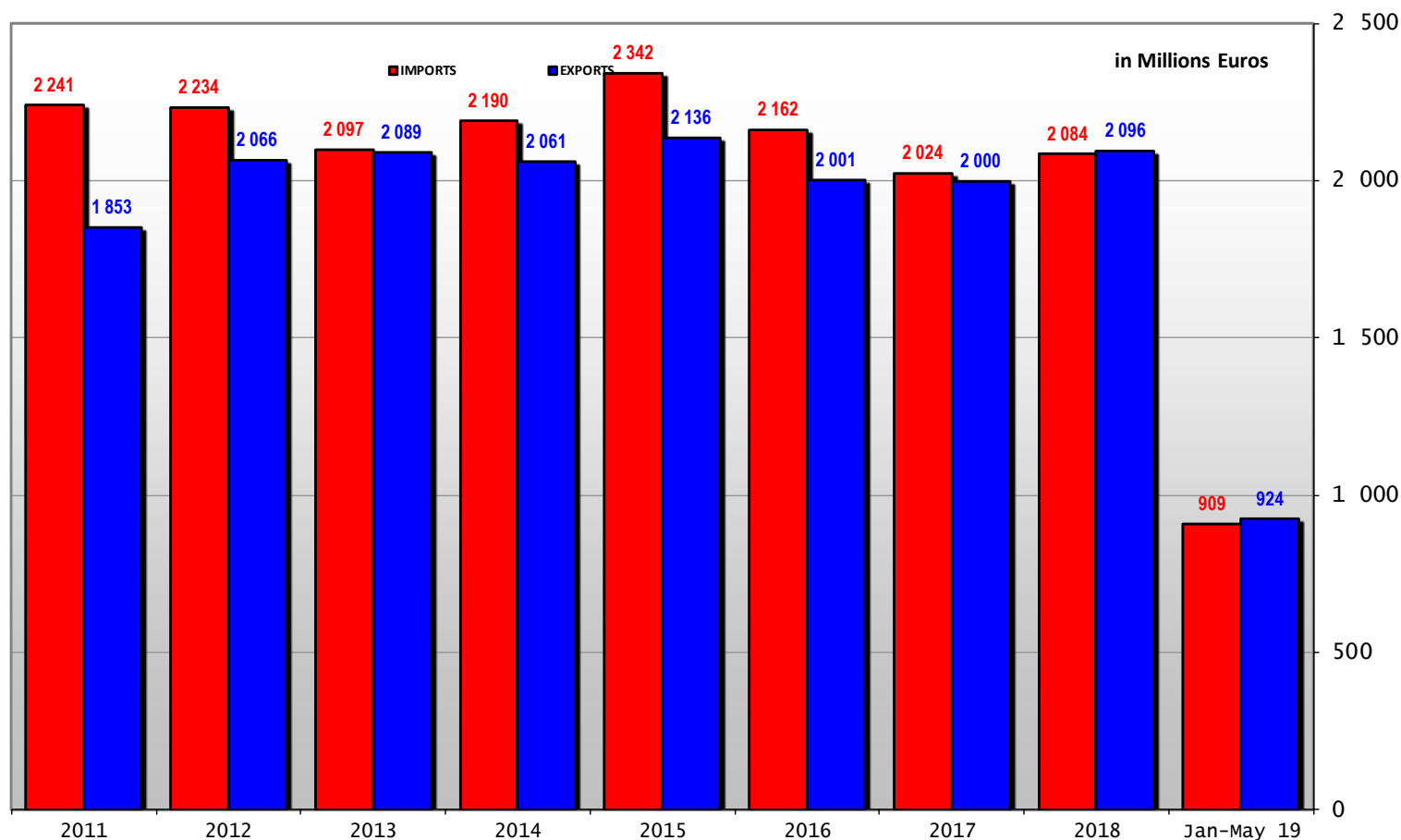
EU EXPORTS OF POULTRY MEAT & POULTRY MEAT PRODUCTS TO SOUTH AFRICA



EU Poultry meat Trade Balance



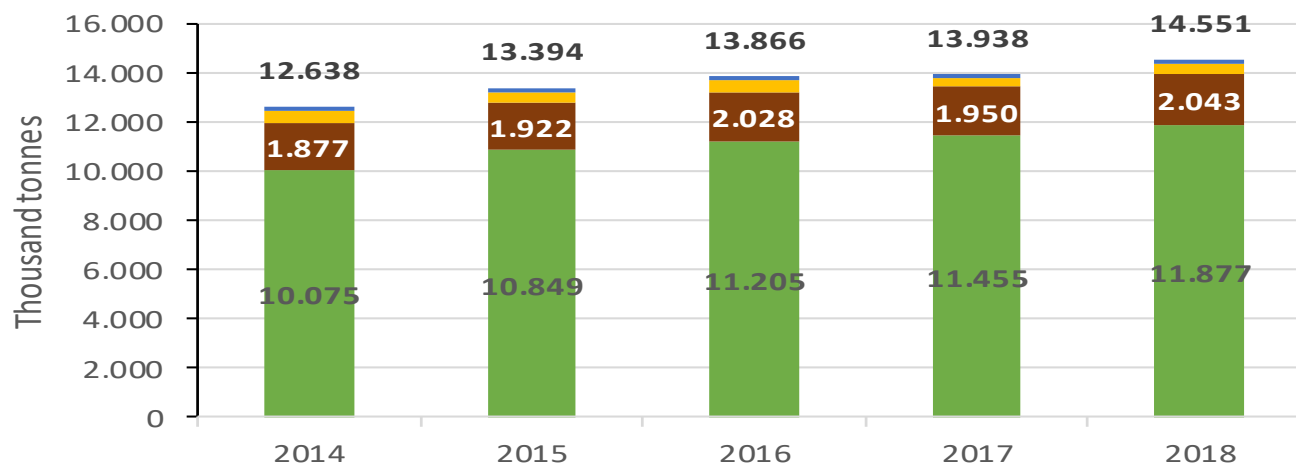
EU Poultry meat trade balance (in 1000 euros)















EU turkey market and external trade

EU poultry meat slaughterings (thousand tonnes)



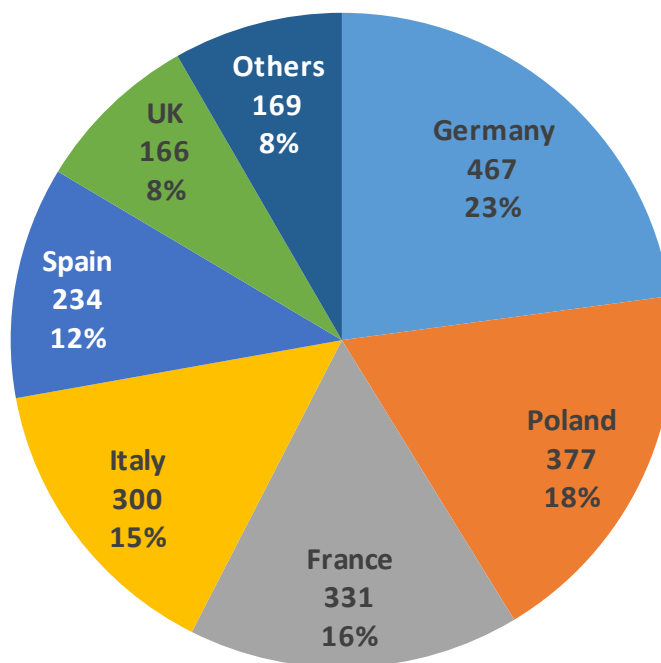
Source: Eurostat

■ Chicken
 ■ Turkey
 ■ Duck
 ■ Other poultry

	2014	2015	2016	2017	2018
Chicken	10.075	10.849	11.205	11.455	11.877
Turkey	1.877	1.922	2.028	1.950	2.043
<i>Change</i>	 + 2,4%	 + 2,4%	 + 5,5%	 - 3,8%	 + 4,8%
Duck	459	421	431	339	431
Other poultry	226	202	202	194	199
Total	12.638	13.394	13.866	13.938	14.551
<i>Change</i>	 + 3,7%	 + 6,0%	 + 3,5%	 + 0,5%	 + 4,4%

EU main turkey meat producers in 2018 (in thousand tonnes)

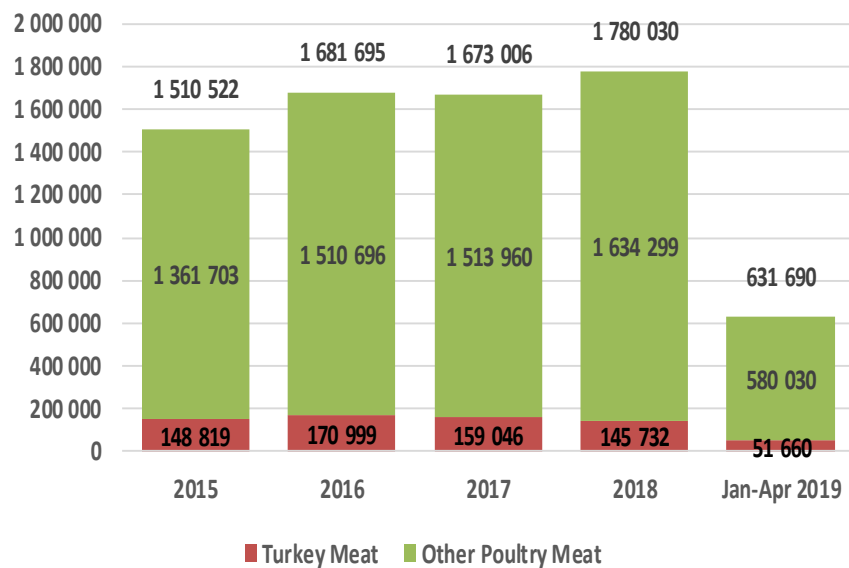
Total turkey meat production in
2018 = 2 043 thousand tonnes



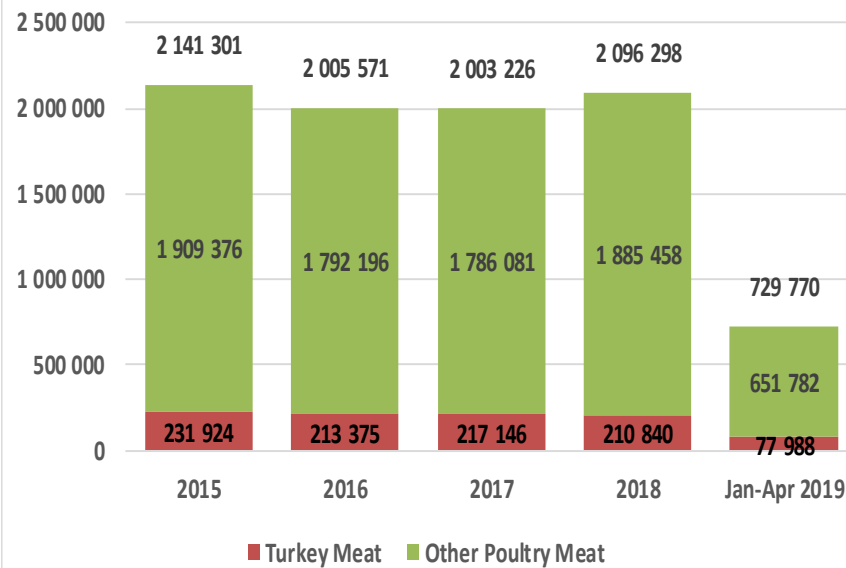
Germany Poland France Italy Spain UK Others

Turkey meat exports represent limited but stable share of EU poultry exports (up to 10% to 11% of volume and value, respectively)...

EU Exports of Poultry Meat in Tons

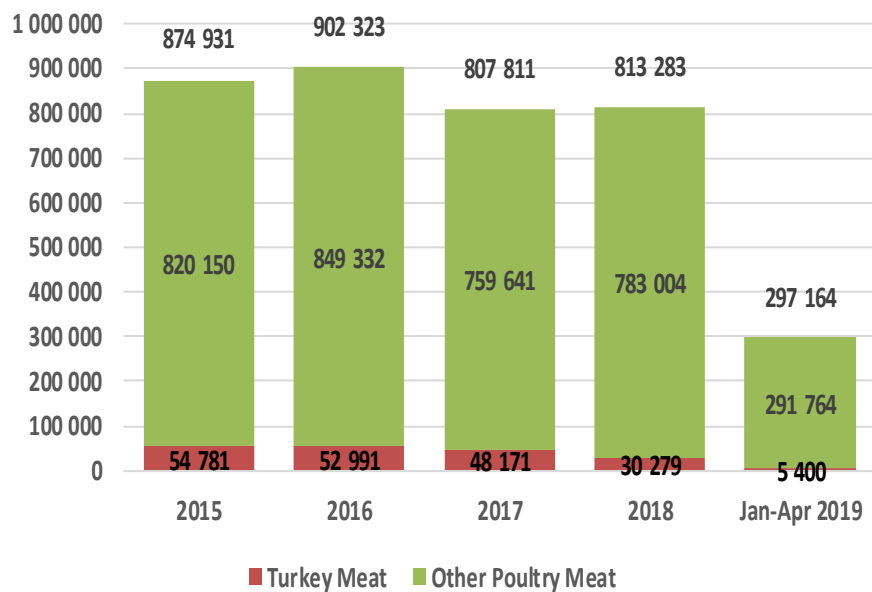


EU Exports of Poultry Meat in Thousand Euros

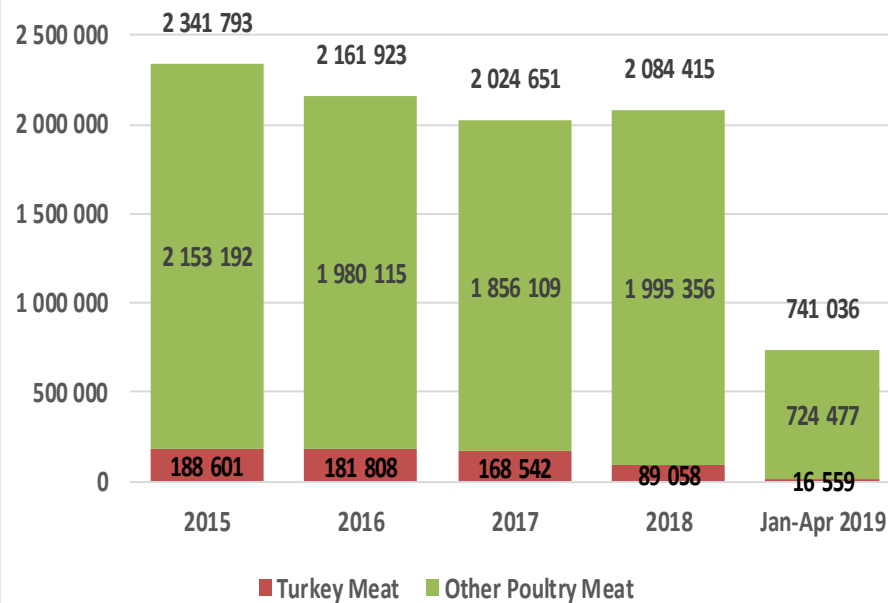


...and account up to 6% to 8% of EU poultry imports in volume and value, respectively

Eu Imports of Poultry Meat in Tons

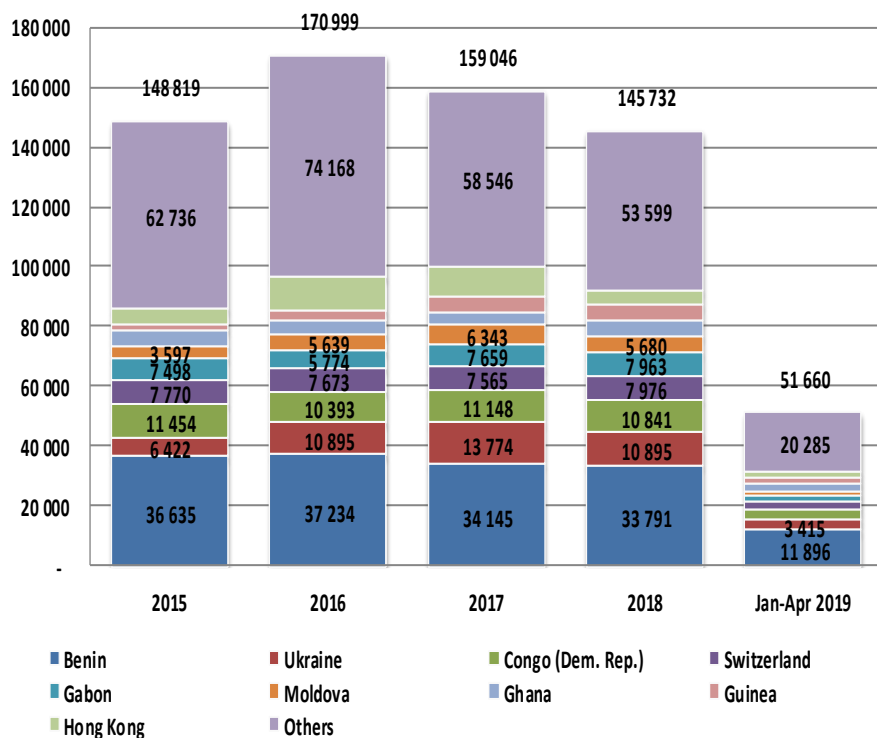


EU Imports of Poultry Meat in Thousand Euros



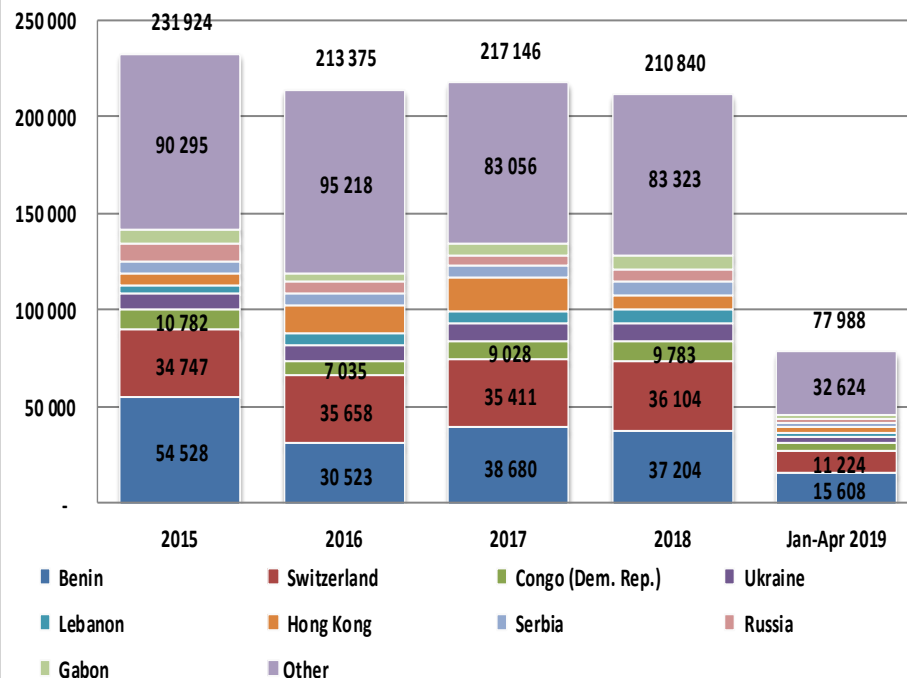
EU mostly exports low-value turkey cuts to a variety of destinations...

EU Exports of Turkey Meat by Destination (in Tons)



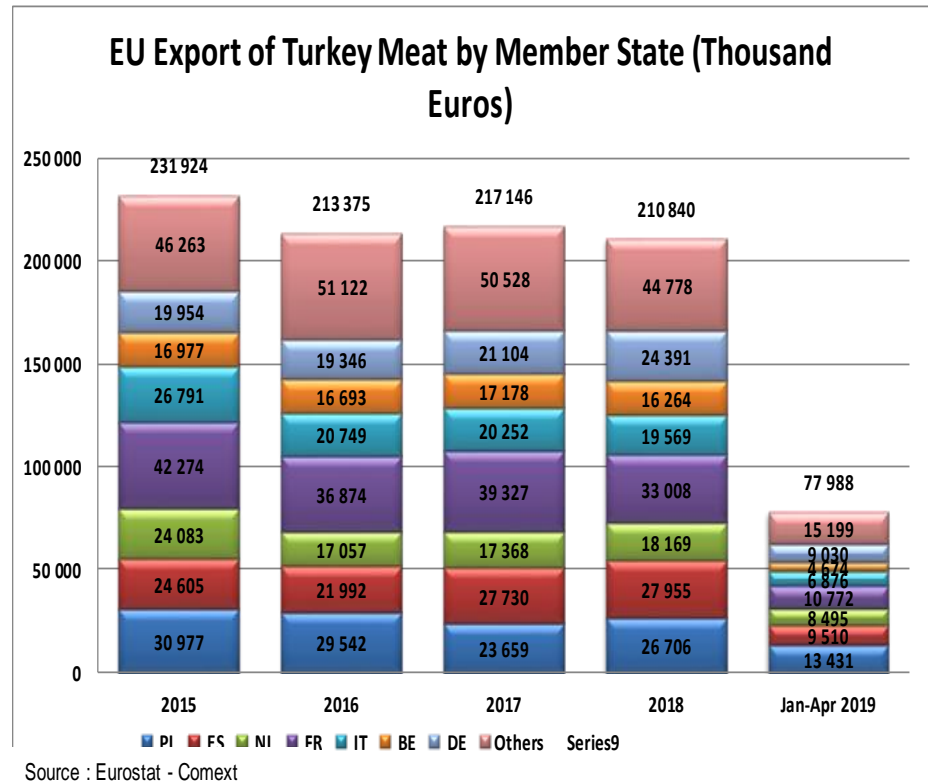
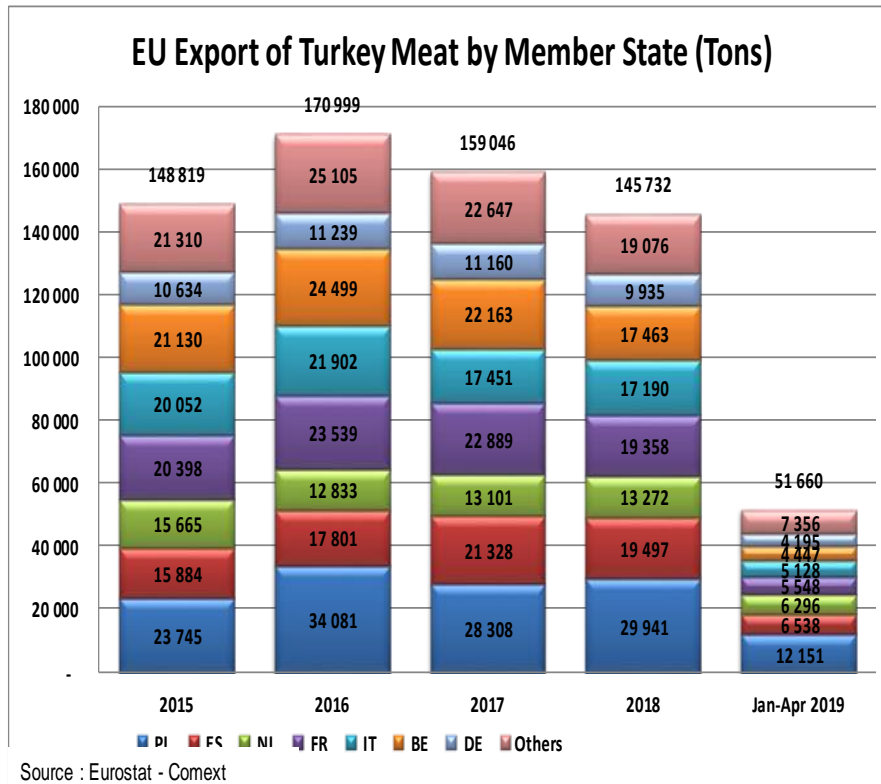
Source : Eurostat - Comext

EU Exports of Turkey Meat by Destination (Thousand Euros)



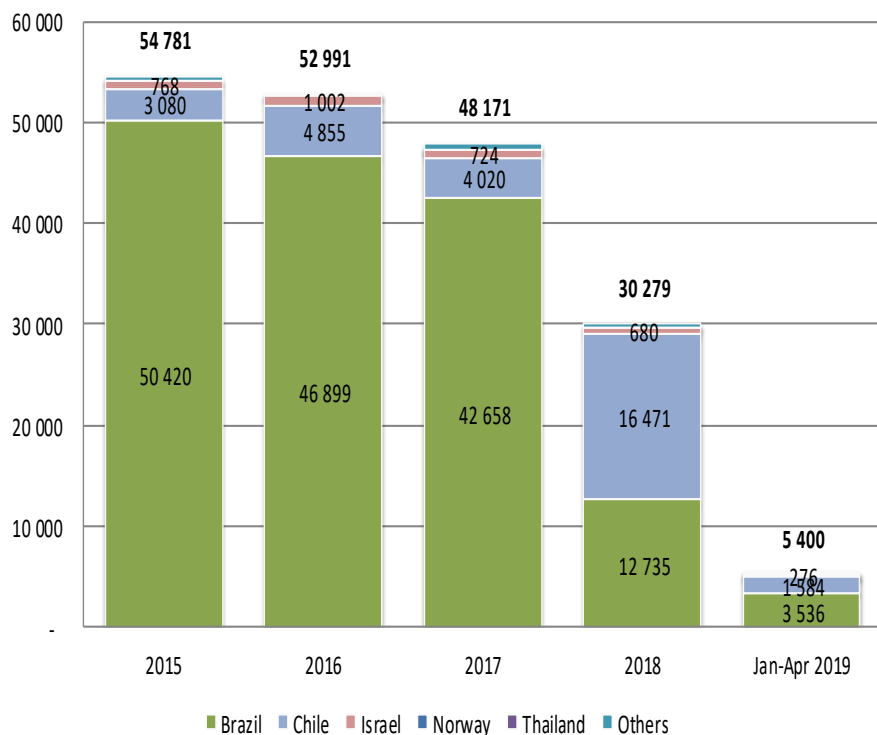
Source : Eurostat - Comext

Key EU producing countries tend to be also important exporters

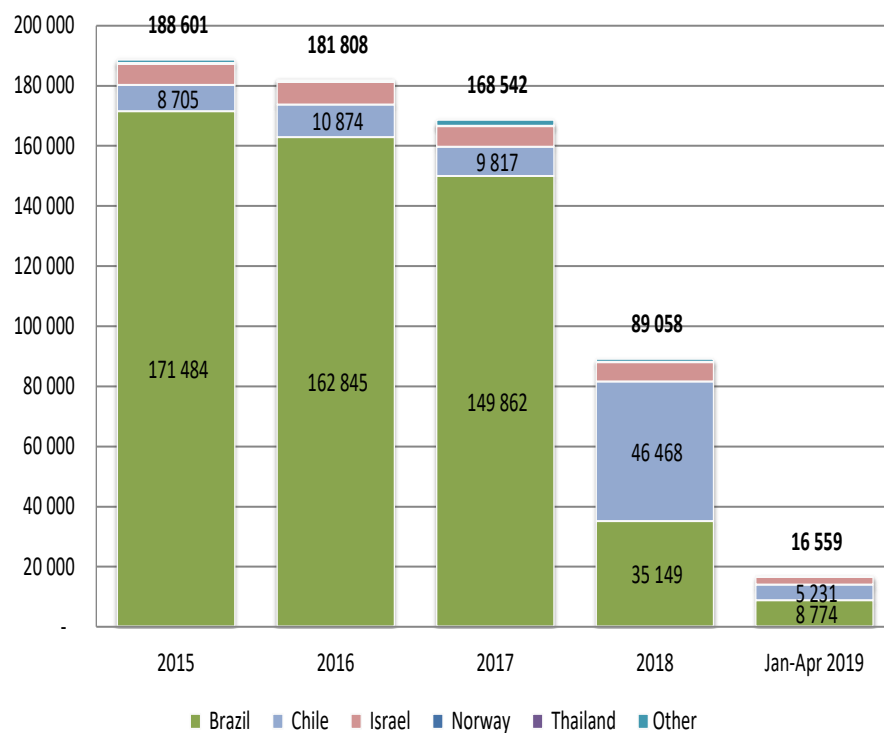


EU imports high-value turkey cuts/preparations, mostly from BR and CL under TRQs

EU Turkey Meat Imports by Origin (in Tons)

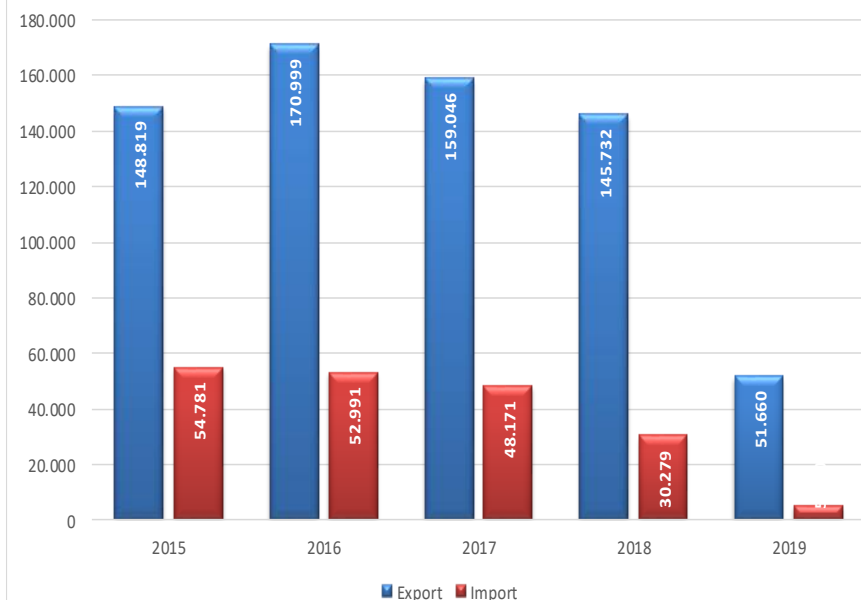


EU Turkey Meat Imports by Origin (Thousand Euros)

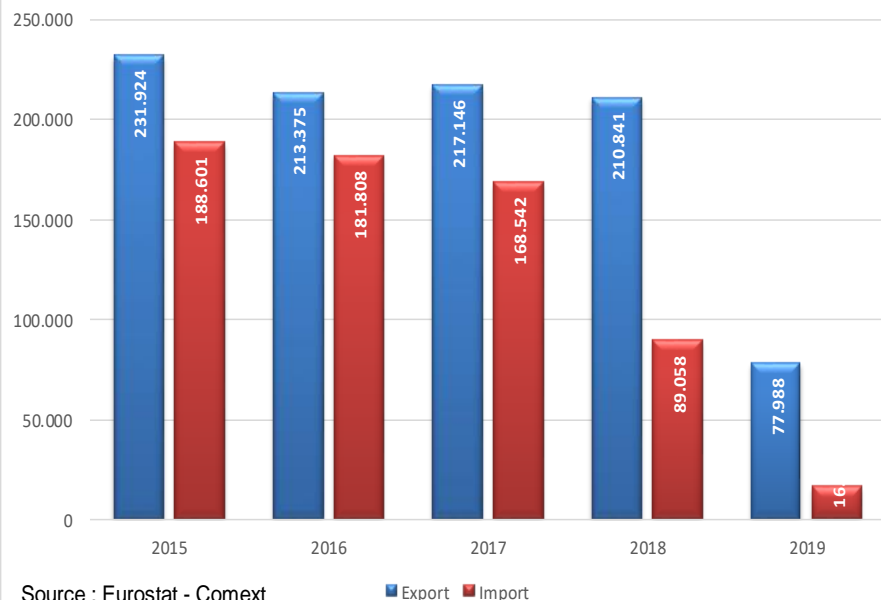


EU trade balance is clearly positive in volume, less so in value due to export/import product structure

EU Trade Balance of Turkey Meat (Tons)



EU Trade Balance of Turkey Meat (Thousand Euros)



Source : Eurostat - Comext

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