

# **EU Market Situation for Poultry**

**Civil Dialog Group on  
Poultry & eggs**

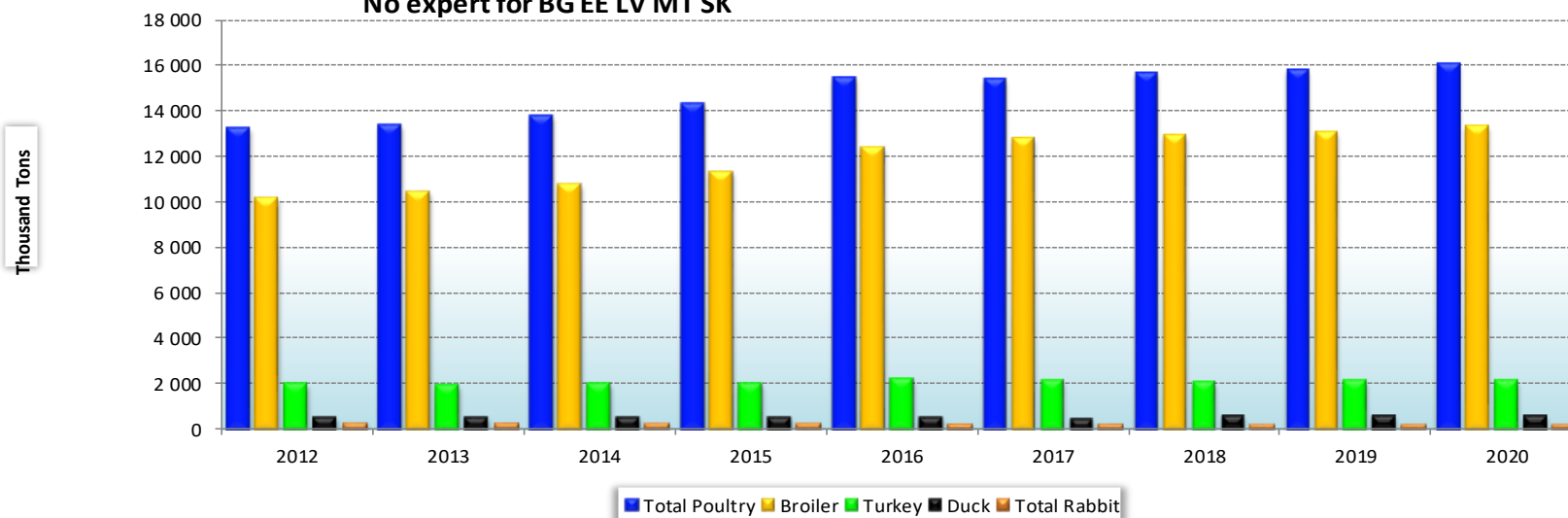
**26 November 2019**



## Experts EU production forecast on Poultry and Rabbit

Missing or incomplete data for EL HR LT NL FI

No expert for BG EE LV MT SK



	2012	2013	2014	2015	2016	2017	2018	2019	2020	% 2019/ 2018	% 2020/ 2019
<b>Total Poultry</b>	13 220	13 367	13 797	14 325	15 458	15 414	15 657	15 758	16 085	+ 0.6%	+ 2.1%
Broiler	10 173	10 445	10 729	11 295	12 403	12 766	12 934	13 011	13 324	+ 0.6%	+ 2.4%
Turkey	1 967	1 935	1 964	1 967	2 154	2 084	2 066	2 084	2 110	+ 0.9%	+ 1.2%
Duck	500	485	512	503	507	470	547	551	542	+ 0.6%	- 1.5%
<b>Total Rabbit</b>	281	260	246	243	228	210	191	184	177	- 3.6%	- 3.8%

## EU production of poultry (expert forecast Autumn 2019)

Source : Experts WG

Qty in Tonnes

% change

	2018	2019	2020	%2019/2018	%2020/2019
PL	2 582 290	2 720 900	2 850 800	5.4	4.8
UK	1 937 000	1 936 900	1 983 300	-0.0	2.4
FR	1 790 600	1 735 500	1 735 500	-3.1	0.0
DE	1 817 900	1 838 800	1 858 800	1.1	1.1
ES	1 427 200	1 373 600	1 443 700	-3.8	5.1
IT	1 314 000	1 316 000	1 322 000	0.2	0.5
NL	1 119 000	1 119 000	1 119 000	0.0	0.0
HU	668 650	679 700	690 950	1.7	1.7
BE	424 800	416 800	420 400	-1.9	0.9
RO	429 000	430 000	443 000	0.2	3.0
PT	341 700	343 100	343 600	0.4	0.1
IE	217 000	229 000	236 000	5.5	3.1
CZ	192 800	197 000	201 500	2.2	2.3
EL	192 000	192 000	192 000	0.0	0.0
SE	222 100	228 800	235 900	3.0	3.1
DK	158 500	168 500	171 500	6.3	1.8
FI	135 286	141 500	141 500	4.6	0.0
LT	140 000	140 000	140 000	0.0	0.0
AT	139 123	139 664	140 714	0.4	0.8
BG	102 000	102 000	102 000	0.0	0.0
SK	86 000	86 000	86 000	0.0	0.0
HR	83 000	84 500	84 500	1.8	0.0
SI	69 450	71 370	74 740	2.8	4.7
CY	25 580	25 790	25 900	0.8	0.4
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
<b>EU</b>	<b>15 656 979</b>	<b>15 758 424</b>	<b>16 085 304</b>	<b>0.6</b>	<b>2.1</b>

## EU production of broiler (expert forecast Autumn 2019)

Source : Experts WG

Qty in Tonnes

% change

































	2018	2019	2020		%2019/2018	%2020/2019
PL	2 115 000	2 230 000	2 340 000		5.4	4.9
UK	1 749 800	1 749 400	1 798 600		-0.0	2.8
DE	1 412 000	1 425 000	1 440 000		0.9	1.1
ES	1 191 000	1 133 000	1 200 000		-4.9	5.9
FR	1 187 700	1 151 000	1 151 000		-3.1	0.0
NL	1 100 000	1 100 000	1 100 000		0.0	0.0
IT	1 001 000	1 006 000	1 010 000		0.5	0.4
HU	414 200	420 500	446 500		1.5	6.2
BE	417 500	409 000	412 500		-2.0	0.9
RO	415 000	415 000	428 000		0.0	3.1
PT	289 000	290 000	290 000		0.3	0.0
IE	190 000	200 000	205 000		5.3	2.5
EL	185 000	185 000	185 000		0.0	0.0
CZ	170 000	175 000	180 000		2.9	2.9
SE	217 400	224 000	231 000		3.0	3.1
DK	157 300	167 000	170 000		6.2	1.8
FI	127 156	133 000	133 000		4.6	0.0
LT	130 000	130 000	130 000		0.0	0.0
AT	113 640	114 000	115 000		0.3	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	69 000	70 000	70 000		1.4	0.0
SI	64 020	65 350	69 000		2.1	5.6
CY	25 400	25 600	25 700		0.8	0.4
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
<b>EU</b>	<b>12 934 396</b>	<b>13 011 130</b>	<b>13 323 580</b>		<b>0.6</b>	<b>2.4</b>

## EU production of turkey (expert forecast Autumn 2019)

Source : Experts WG

Qty in Tonnes

% change

	2018	2019	2020	%2019/2018		%2020/2019	
PL	384 000	400 000	415 000		4.2		3.8
DE	359 900	370 000	375 000		2.8		1.4
FR	338 900	320 000	320 000		-5.6		0.0
IT	301 000	298 000	300 000		-1.0		0.7
ES	233 000	236 000	239 000		1.3		1.3
UK	156 800	157 600	154 900		0.5		-1.7
HU	97 670	102 000	103 500		4.4		1.5
PT	42 100	42 700	43 000		1.4		0.7
IE	27 000	29 000	31 000		7.4		6.9
NL	28 000	28 000	28 000		0.0		0.0
AT	24 530	24 530	24 530		0.0		0.0
RO	14 000	15 000	15 000		7.1		0.0
HR	13 500	14 000	14 000		3.7		0.0
CZ	10 100	10 000	10 000		-1.0		0.0
FI	8 130	8 500	8 500		4.6		0.0
BE	7 300	7 800	7 900		6.8		1.3
SI	5 430	6 020	5 740		10.9		-4.7
LT	5 500	5 500	5 500		0.0		0.0
SE	4 700	4 800	4 900		2.1		2.1
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	180	190	200		5.6		5.3
BG	100	100	100		0.0		0.0
LV							
EE							
MT							
EU	2 065 840	2 083 740	2 109 770		0.9		1.2

## EU production of duck (expert forecast Autumn 2019)

Source : Experts WG

Qty in Tonnes

% change

	2018	2019	2020		%2019/2018	%2020/2019
FR	226 300	229 000	229 000		1.2	0.0
HU	122 900	119 000	107 100		-3.2	-10.0
PL	44 960	51 160	54 880		13.8	7.3
DE	41 200	39 000	39 000		-5.3	0.0
UK	30 400	29 900	29 800		-1.6	-0.3
BG	22 000	22 000	22 000		0.0	0.0
NL	19 000	19 000	19 000		0.0	0.0
CZ	12 200	11 500	11 000		-5.7	-4.3
PT	10 600	10 400	10 600		-1.9	1.9
IE	5 800	5 800	5 800		0.0	0.0
IT	6 000	6 000	6 000		0.0	0.0
ES	3 200	4 600	4 700		43.8	2.2
DK	1 200	1 500	1 500		25.0	0.0
SK	600	600	600		0.0	0.0
HR	500	500	500		0.0	0.0
AT	419	600	650		43.2	8.3
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						
<b>EU</b>	<b>547 384</b>	<b>550 665</b>	<b>542 235</b>		<b>0.6</b>	<b>-1.5</b>

## EU production of rabbit (expert forecast Autumn 2019)

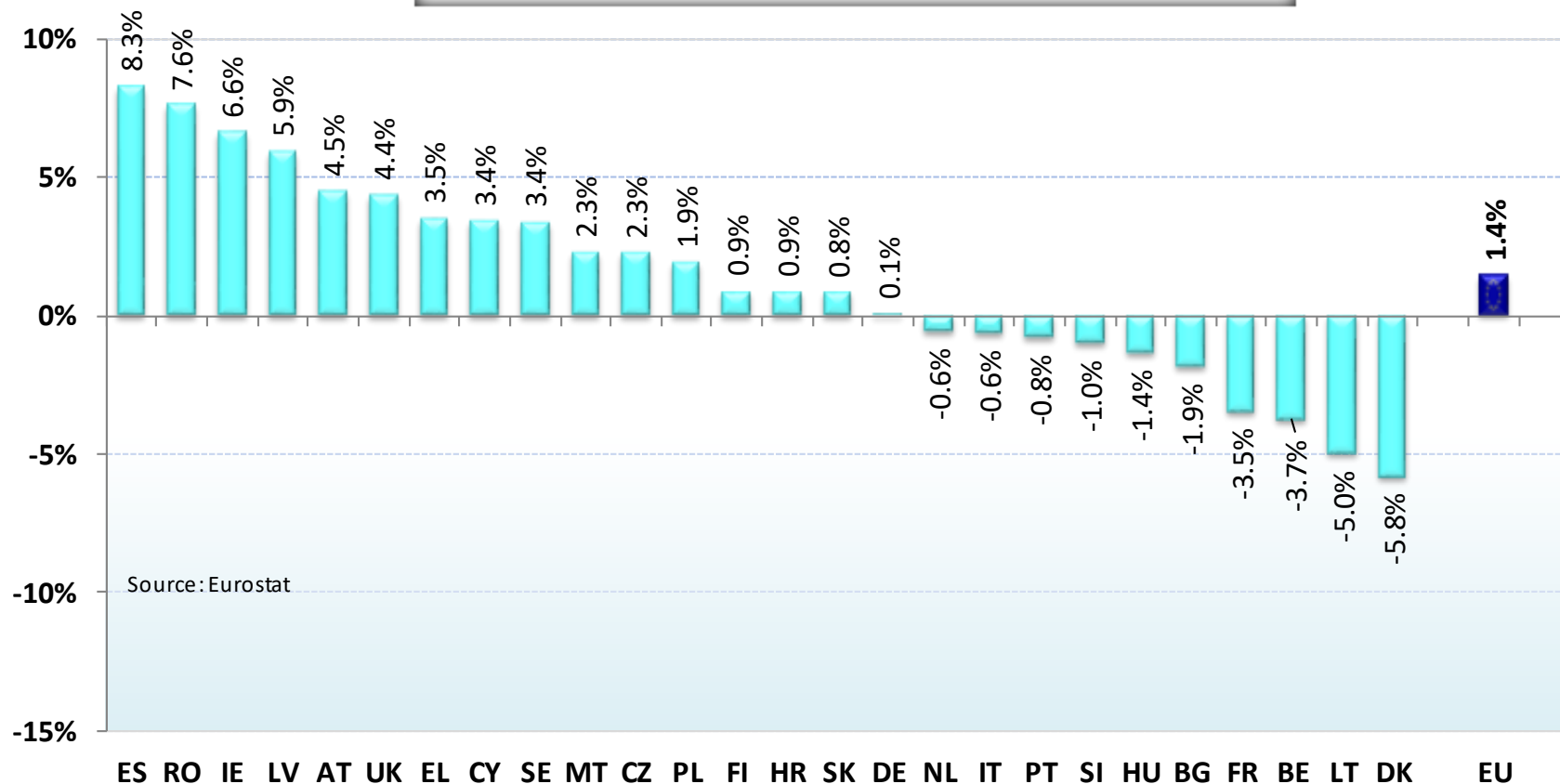
Source : Experts WG

Qty in Tonnes

% change

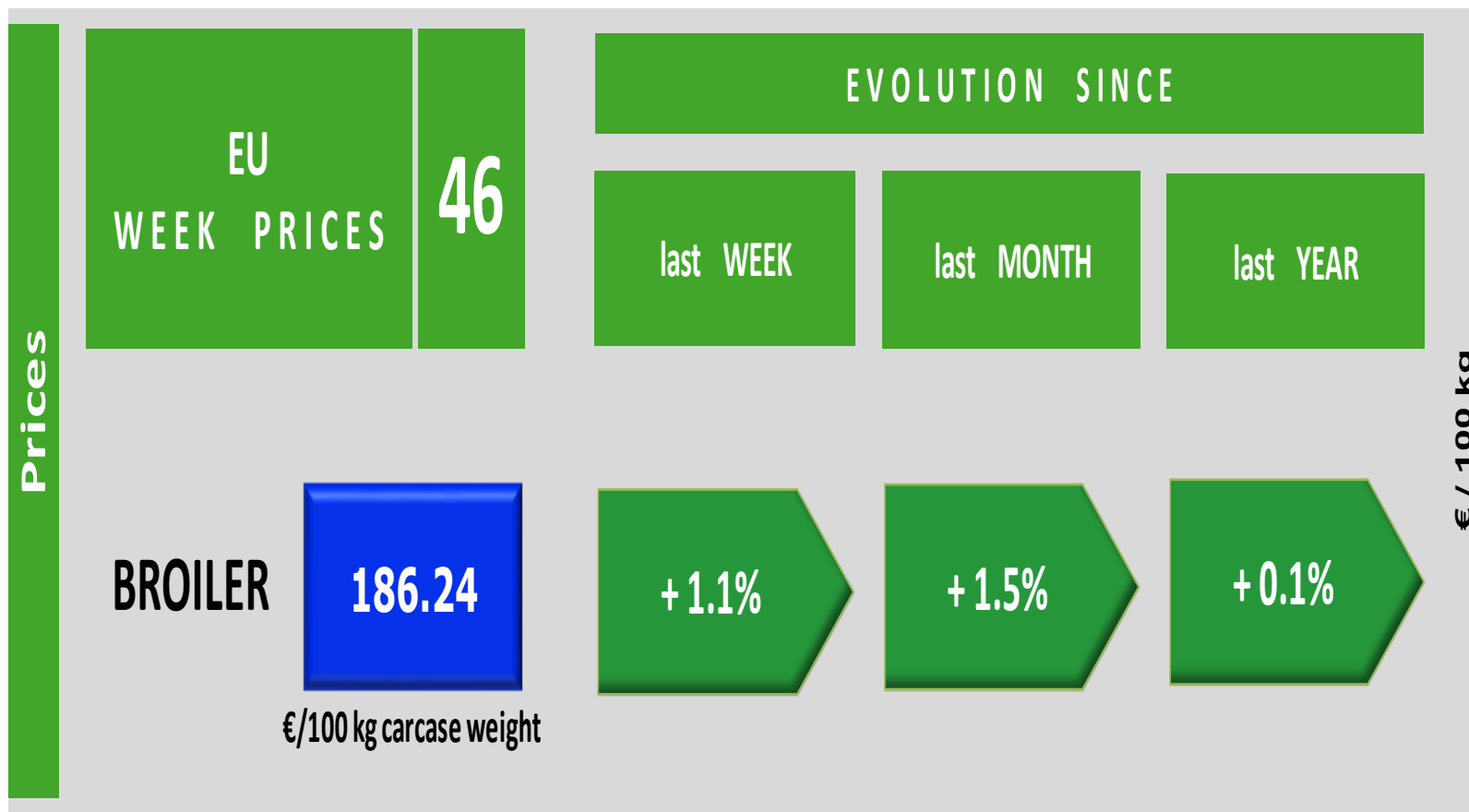
	2018	2019	2020	%2019/2018	%2020/2019
ES	53 000	53 000	51 000	0.0	-3.8
FR	50 000	45 000	42 000	-10.0	-6.7
IT	40 000	38 000	36 000	-5.0	-5.3
PL	24 000	24 000	24 000	0.0	0.0
CZ	9 100	9 100	9 100	0.0	0.0
PT	5 700	5 800	5 800	1.8	0.0
EL	5 000	5 000	5 000	0.0	0.0
SK	3 600	3 600	3 600	0.0	0.0
CY	510	520	530	2.0	1.9
BE	300	250	250	-16.7	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					
<b>EU</b>	<b>191 212</b>	<b>184 272</b>	<b>177 282</b>	<b>-3.6</b>	<b>-3.8</b>

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



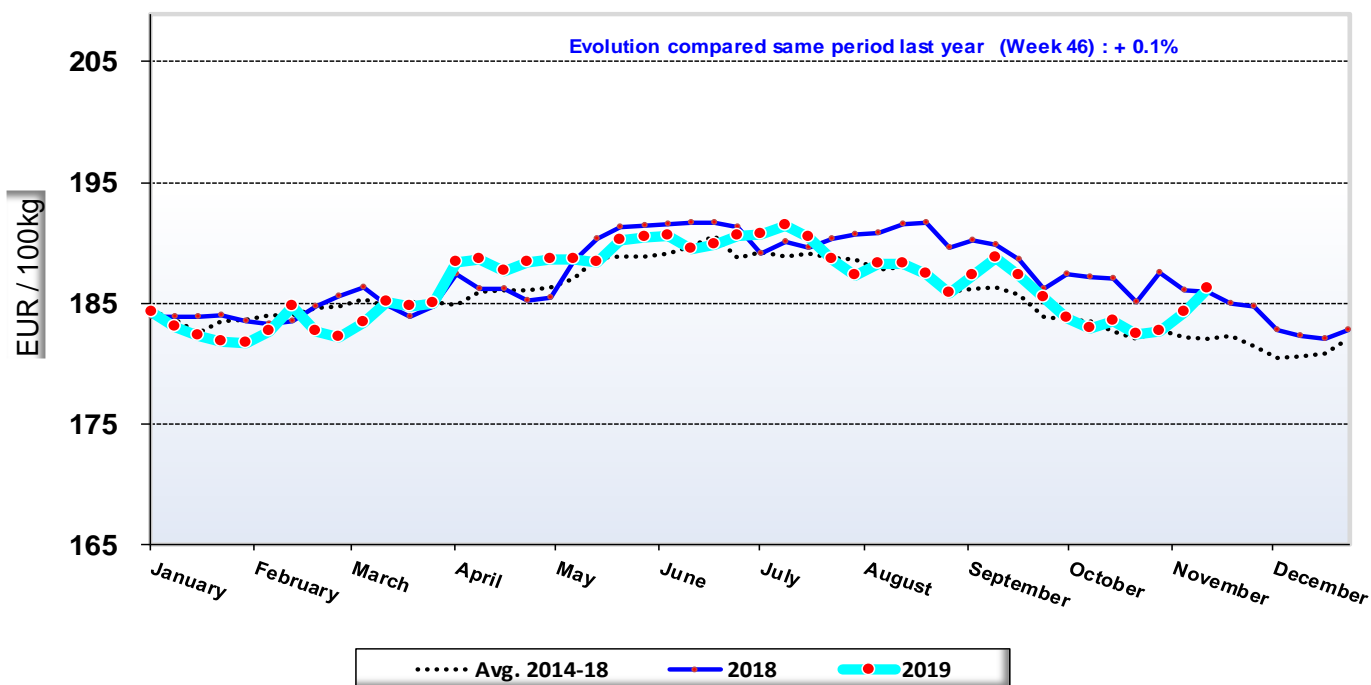


# PRICES



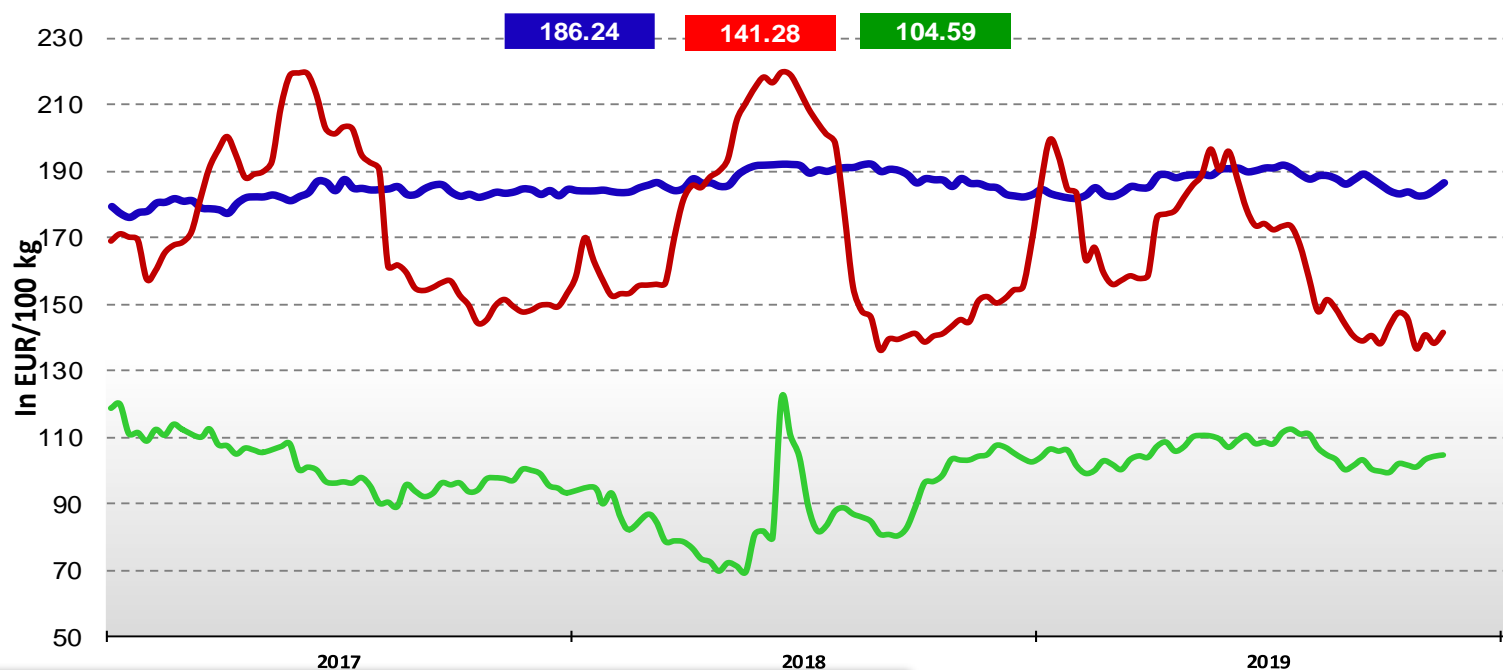
## Evolution of the weekly EU average price for **Broiler**

Latest price ==> 186.24 EUR/100 kg



Source: MSs notifications (Commission Implementing Regulation (EU) 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

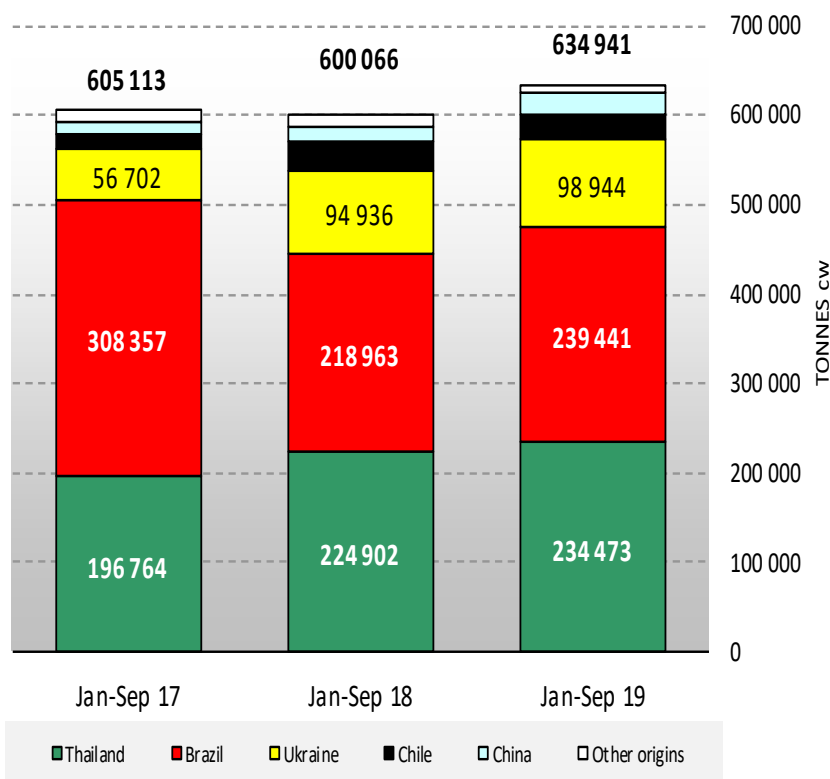
EU US BR

## Imports of Poultry meat from selected origins

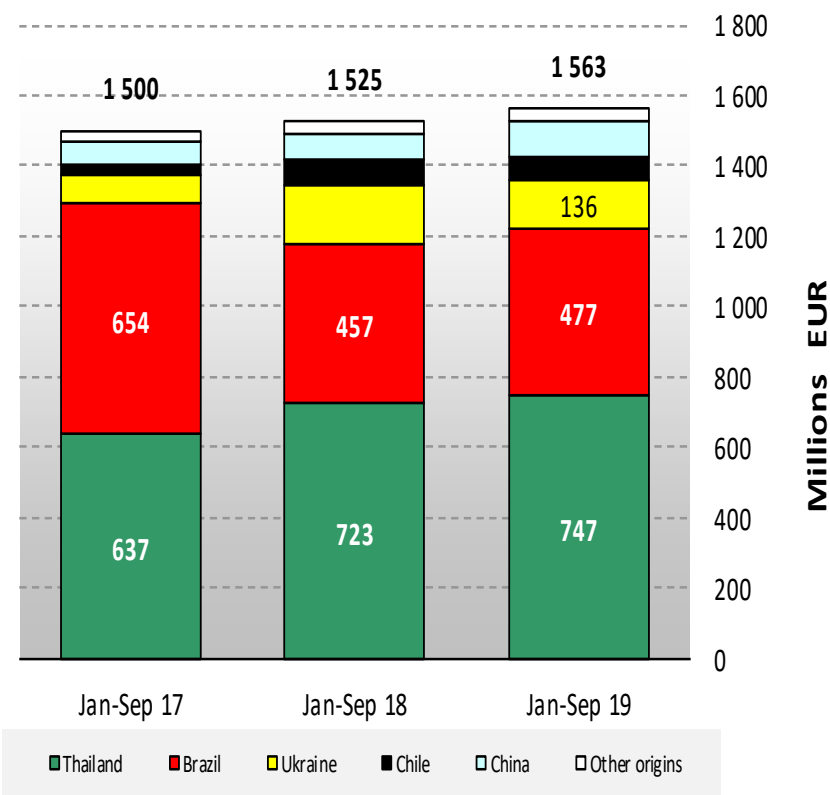
	2015		2016		2017		2018		Jan-Sep 19		Compared to Jan-Sep 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Thailand	274 524	31.4%	290 602	32.2%	265 927	32.9%	311 520	38.3%	234 473	36.9%	+ 4%
Brazil	501 328	57.3%	504 814	55.9%	401 598	49.7%	302 207	37.2%	239 441	37.7%	+ 9%
Ukraine	42 513	4.9%	48 103	5.3%	80 128	9.9%	123 664	15.2%	98 944	15.6%	+ 4%
Chile	22 232	2.5%	28 809	3.2%	24 972	3.1%	35 954	4.4%	28 750	4.5%	- 9%
China	18 384	2.1%	16 951	1.9%	19 107	2.4%	24 525	3.0%	22 901	3.6%	+ 30%
Argentina	8 529	1.0%	6 491	0.7%	6 297	0.8%	7 352	0.9%	4 943	0.8%	- 12%
Switzerland	2 424	0.3%	2 548	0.3%	2 736	0.3%	2 901	0.4%	1 989	0.3%	- 12%
Turkey			441	0.0%	149	0.0%	1 502	0.2%	21	0.0%	- 99%
Others	4 984	0.6%	3 554	0.4%	6 341	0.8%	3 615	0.4%	3 480	0.5%	
Extra-EU	874 919		902 313		807 254		813 240		634 941		
% change			+ 3.1%		- 10.5%		+ 0.7%		+ 5.8%		

## EU poultry meat imports (by origin)

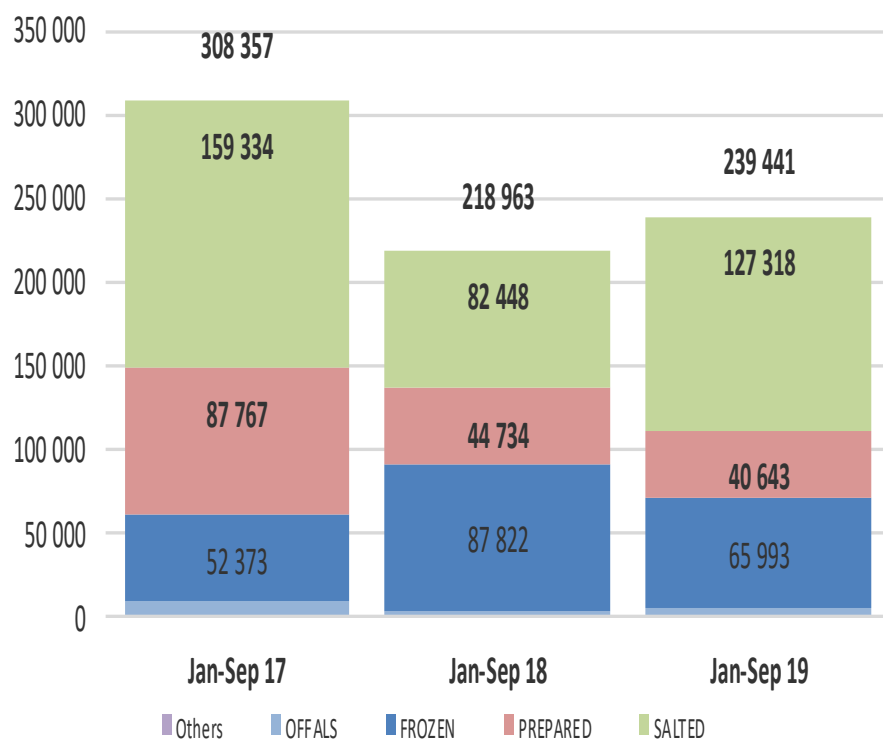
EU IMPORTS of Poultry Meat (TONNES cwe)



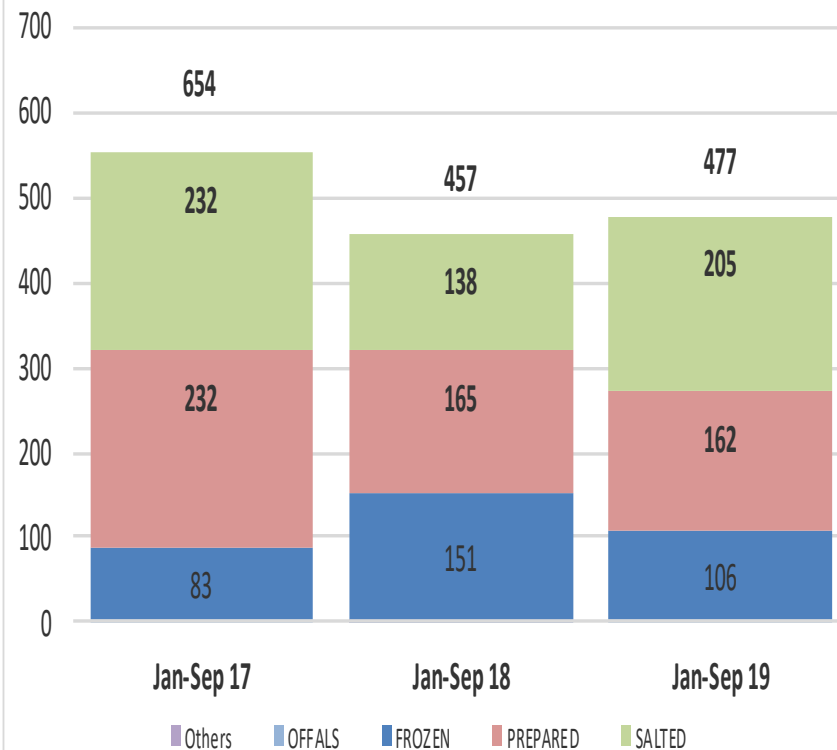
EU IMPORTS of Poultry Meat (Millions EUR)



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

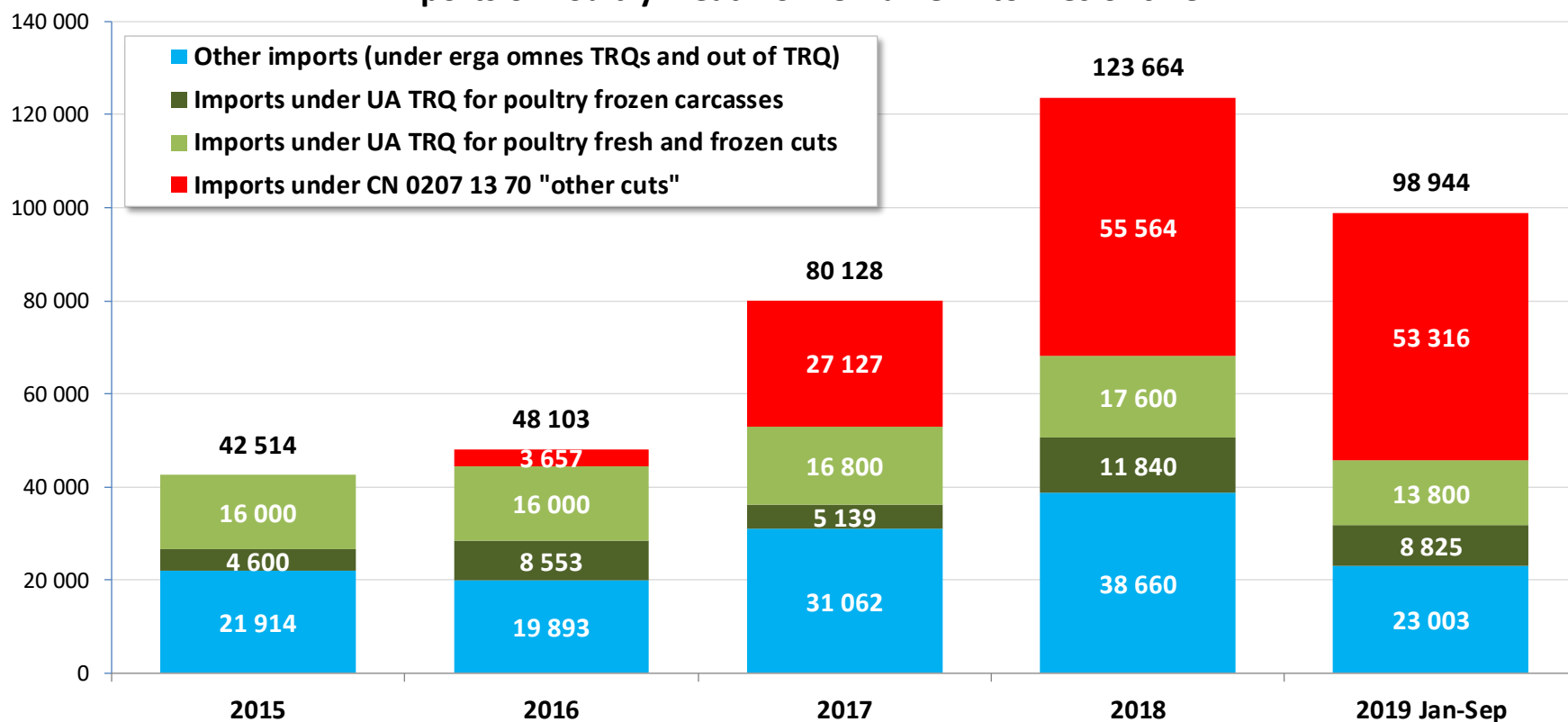


## Eu Imports of Poultry Meat from Brazil (Million Euros)



➤ ***Imports under CN 0207 13 70 growing exponentially since 2017***

**Imports of Poultry meat from Ukraine in tonnes of cwe**



Source : EUROSTAT Comext

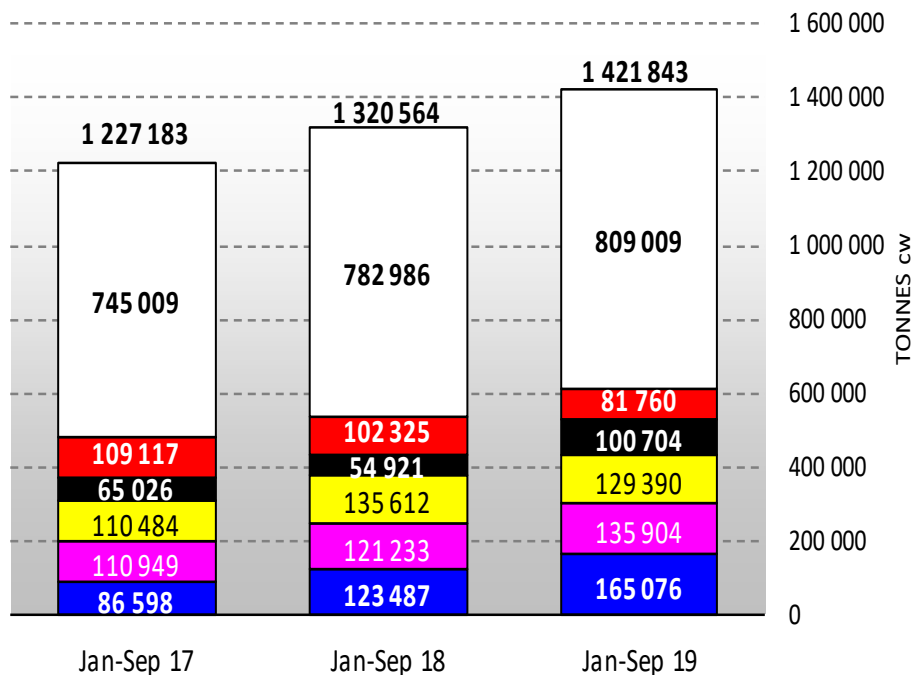
## Exports of Poultry Meat to Selected Destinations

	2015		2016		2017		2018		Jan-Sep 19		Compared to Jan-Sep 18
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Philippines	100 644	6.7%	126 694	7.5%	127 788	7.6%	168 908	9.5%	165 076	11.6%	+ 34%
Ghana	81 025	5.4%	115 783	6.9%	146 958	8.8%	166 002	9.3%	135 904	9.6%	+ 12%
Ukraine	90 851	6.0%	114 841	6.8%	162 627	9.7%	178 158	10.0%	129 390	9.1%	- 5%
South Africa	214 951	14.3%	282 770	16.8%	78 490	4.7%	84 518	4.7%	100 704	7.1%	+ 83%
Hong Kong	101 008	6.7%	123 855	7.4%	148 135	8.9%	127 857	7.2%	81 760	5.8%	- 20%
Vietnam	27 128	1.8%	36 292	2.2%	53 329	3.2%	88 669	5.0%	71 941	5.1%	+ 10%
Benin	139 324	9.2%	120 685	7.2%	105 709	6.3%	92 574	5.2%	66 370	4.7%	- 7%
Congo (Dem. Rep.)	35 849	2.4%	46 260	2.8%	60 080	3.6%	75 986	4.3%	56 835	4.0%	+ 3%
Saudi Arabia	142 496	9.4%	121 645	7.2%	98 788	5.9%	82 554	4.6%	51 273	3.6%	- 22%
Gabon	37 877	2.5%	32 340	1.9%	49 183	2.9%	45 051	2.5%	30 196	2.1%	- 12%
Russia	1 223	0.1%	1 108	0.1%	996	0.1%	910	0.1%	359	0.0%	+ 0%
Other Destinations	535 694	35.5%	556 990	33.2%	638 758	38.2%	668 355	37.6%	532 034	37.4%	
Extra-EU	1 508 071		1 679 264		1 670 842		1 779 542		1 421 843		
% change			+ 11.4%		- 0.5%		+ 6.5%		+ 7.7%		



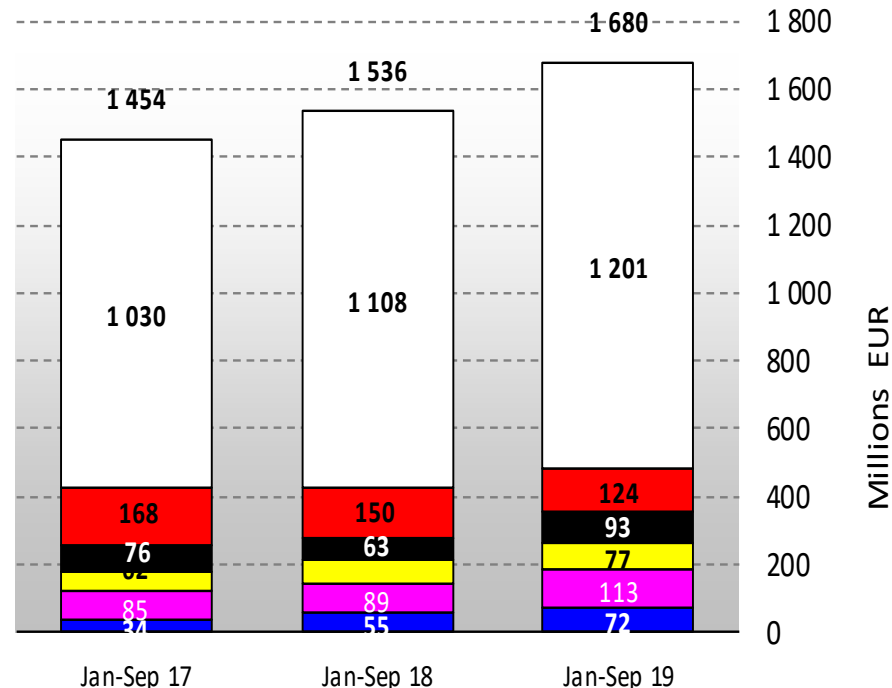
## EU poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



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

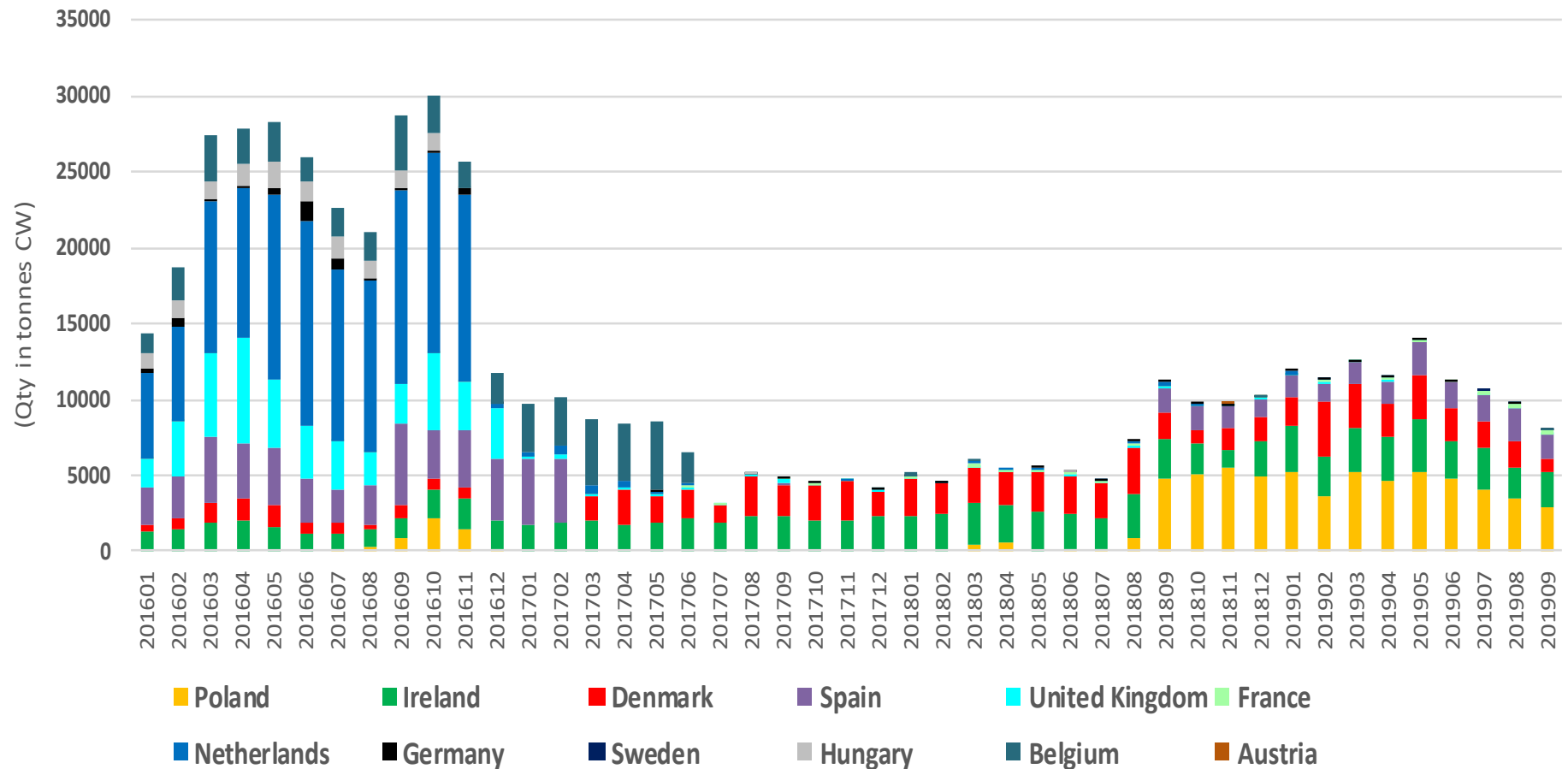
EU EXPORTS of Poultry Meat (Millions EUR)



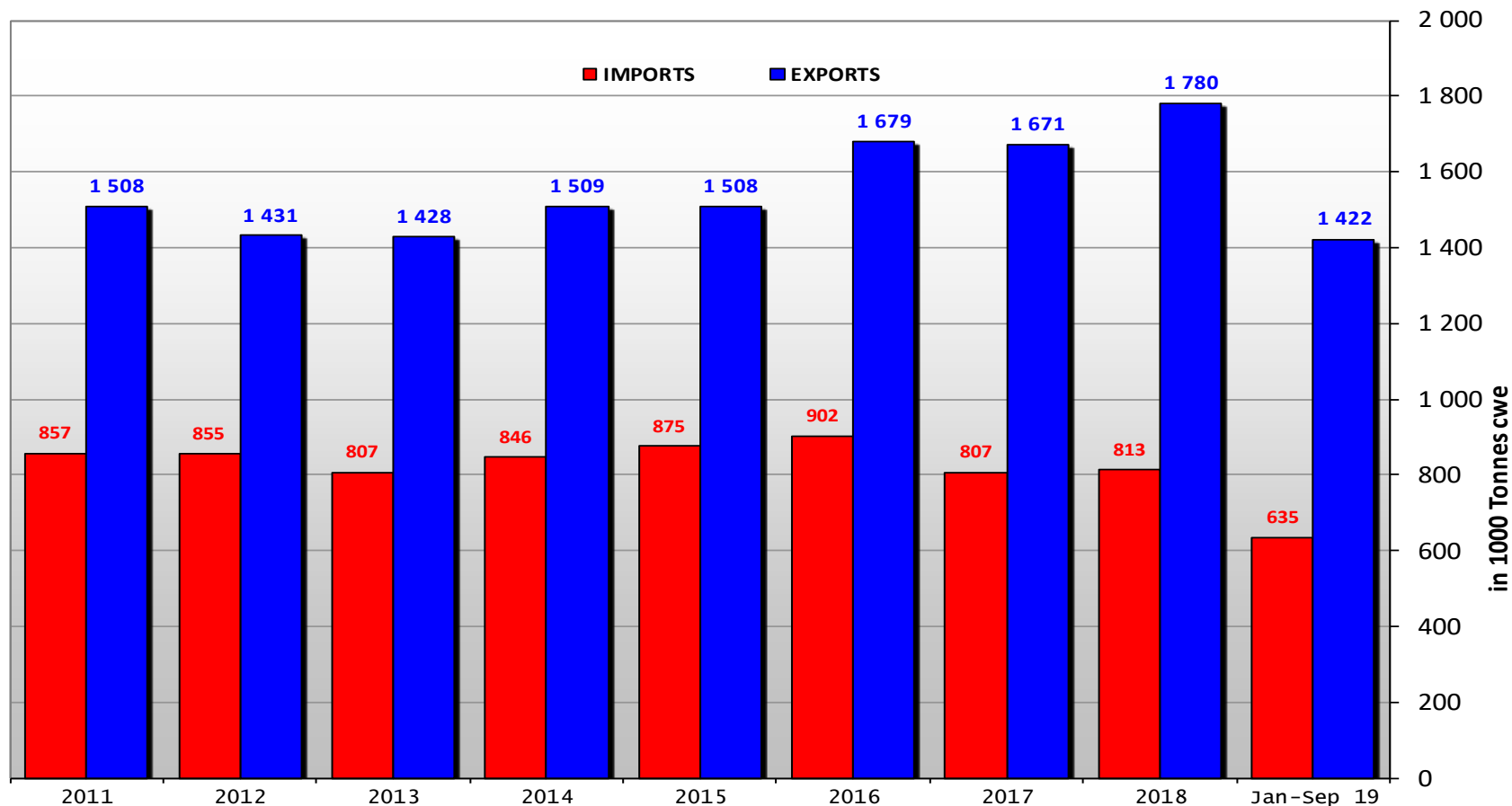
■ Philippines ■ Ghana ■ Ukraine ■ South Africa ■ Hong Kong □ Other destinations \*

\* countries trading less than 1 681 ('Millions EUR)

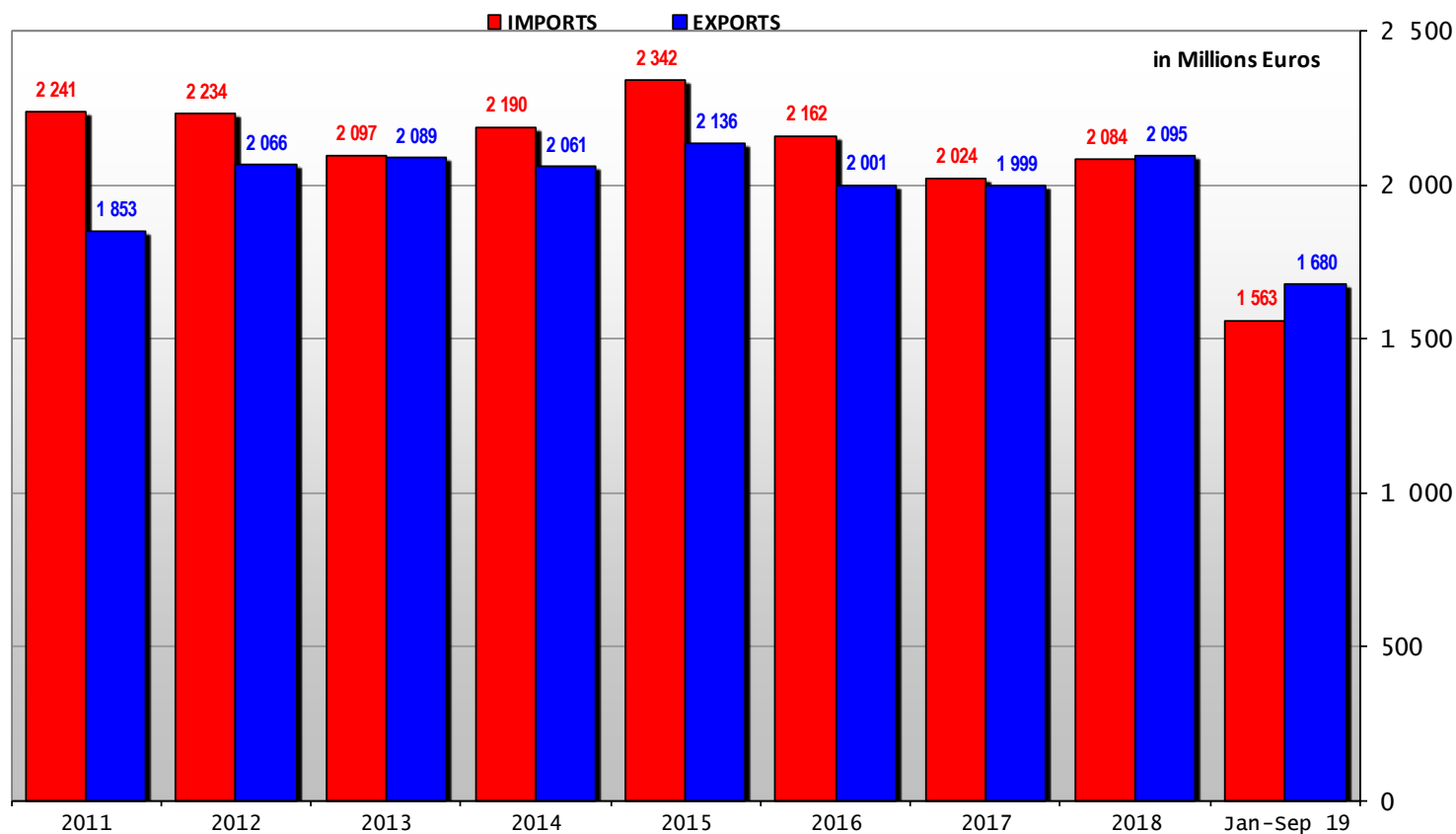
## EU EXPORTS OF POULTRY MEAT & POULTRY MEAT PRODUCTS TO SOUTH AFRICA



## EU Poultry meat Trade Balance



## EU Poultry meat trade balance (in 1000 euros)



# Where to find information

- **Poultry overview:**
- [https://ec.europa.eu/info/food-farming-fisheries/animals-and-animal-products/animal-products/poultry-meat\\_en](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](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](https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/poultry-meat-dashboard_en.pdf)