European Commission

EU Market Situation for Poultry

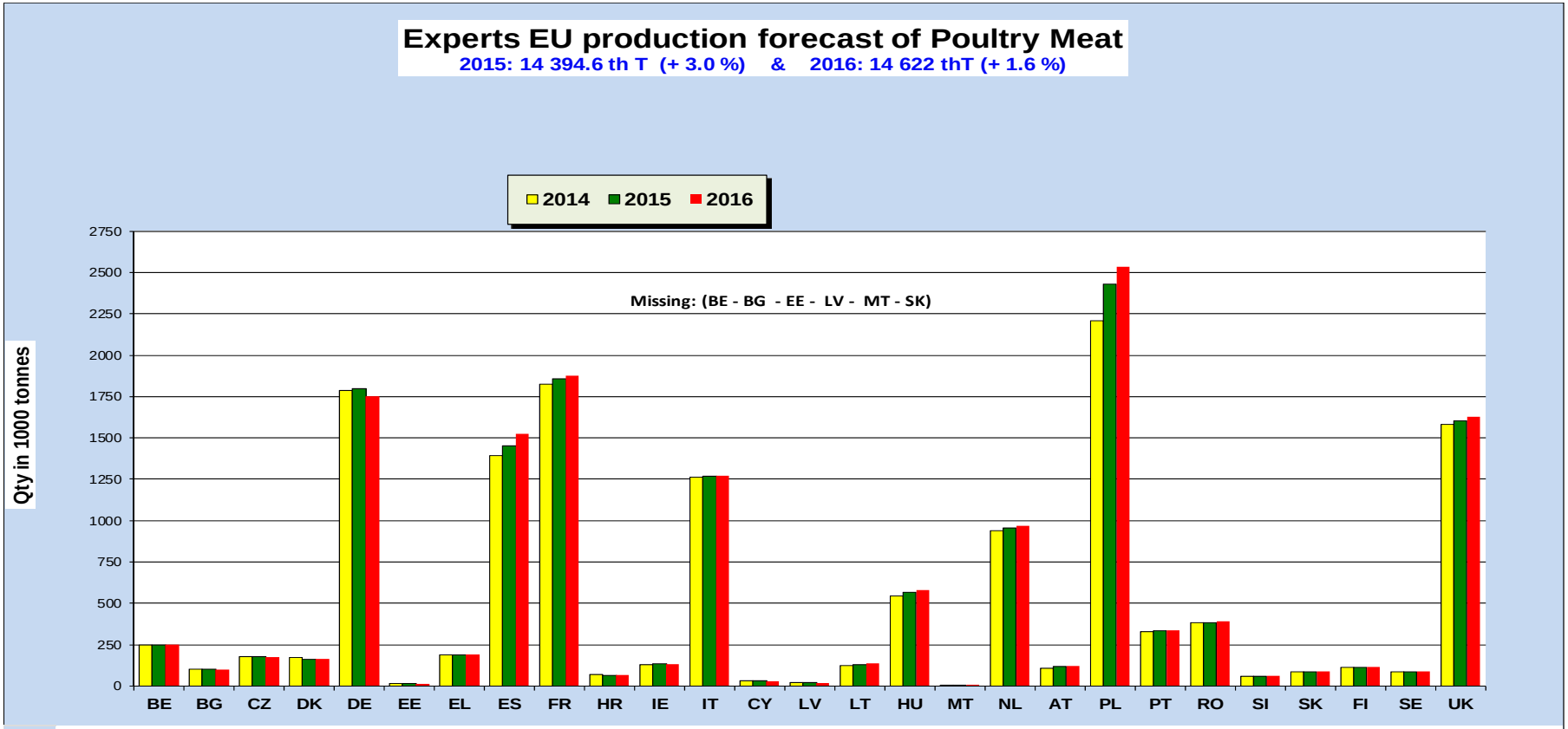
Civil Dialogue Group

07 October 2015

Agriculture and Rural Development

Experts EU production forecast of Poultry Meat

2015: 14 394.6 th T (+ 3.0 %) & 2016: 14 622 thT (+ 1.6 %)



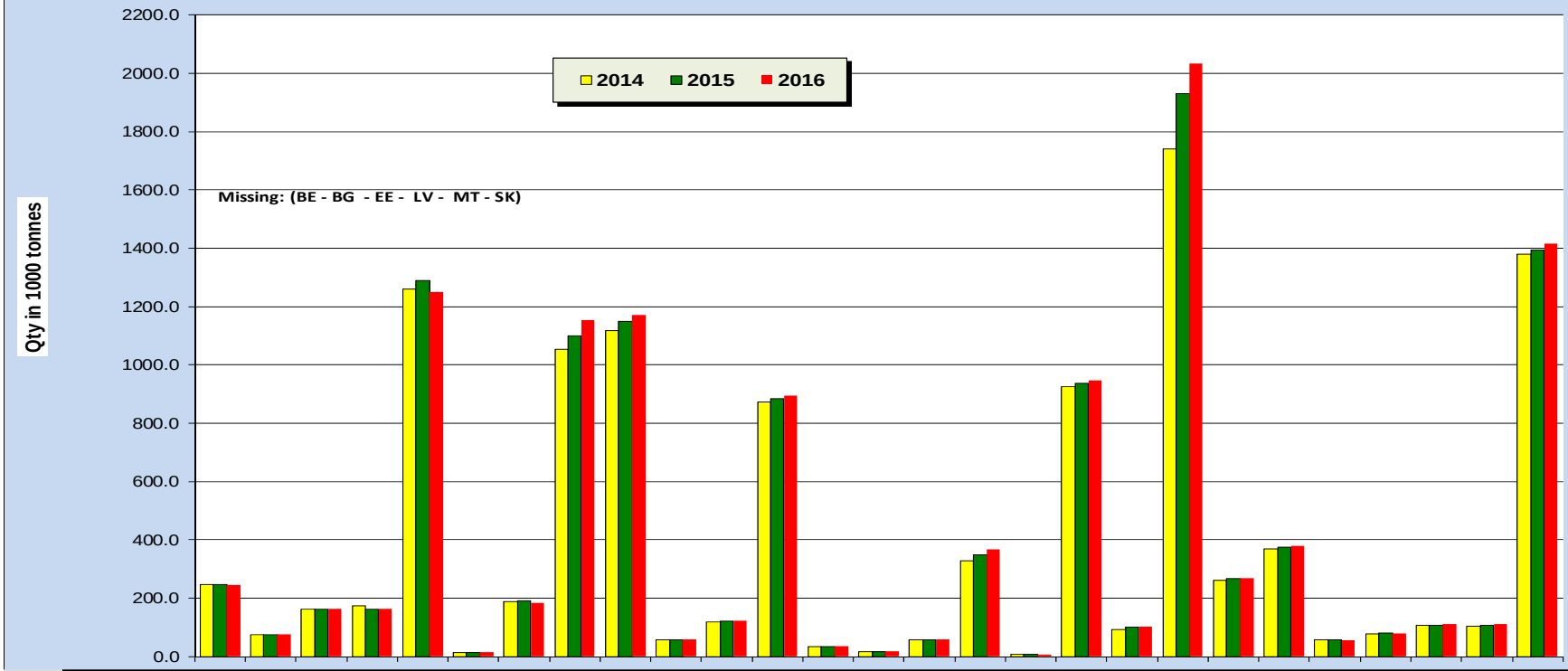
	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	250.0	102.0	176.5	162.4	1800.0	15.0	190.0	1453.0	1855.0	66.9	132.4	1268.0	29.3	21.0	129.5	567.2	6.0	953.0	118.4	2430.0	334.0	384.1	61.0	86.0	114.3	86.0	1603.6	**14 394.6**
%	+ 0.0%	+ 2.0%	+ 0.7%	- 6.1%	+ 0.9%	+ 0.0%	- 0.3%	+ 4.5%	+ 1.6%	- 0.9%	+ 2.6%	+ 0.5%	+ 0.0%	+ 0.0%	+ 2.5%	+ 4.6%	+ 0.0%	+ 1.3%	+ 7.6%	+ 10.0%	+ 2.1%	+ 0.5%	+ 2.0%	+ 1.5%	+ 1.9%	+ 0.0%	+ 1.5%	+ 3.0%
2016	250.0	102.0	176.5	162.4	1 750.0	15.0	192.0	1 525.0	1 875.0	68.9	134.3	1 270.0	29.3	21.0	135.0	582.0	6.0	969.0	118.4	2 535.0	336.0	390.1	61.0	86.0	117.3	86.0	1 629.4	**14 622.6**
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 2.8%	+ 0.0%	+ 1.1%	+ 5.0%	+ 1.1%	+ 3.0%	+ 1.4%	+ 0.2%	+ 0.0%	+ 0.0%	+ 4.2%	+ 2.6%	+ 0.0%	+ 1.7%	+ 0.0%	+ 4.3%	+ 0.6%	+ 1.6%	+ 0.0%	+ 0.0%	+ 2.6%	+ 0.0%	+ 1.6%	+ 1.6%

Source: According to the data sent by the experts of the forecast group

European Commission

Experts EU production forecast of Broiler Meat

2015: 11 271.3 th T (+ 3,5 %) & 2016: 11 484.5 thT (+ 1,9 %)



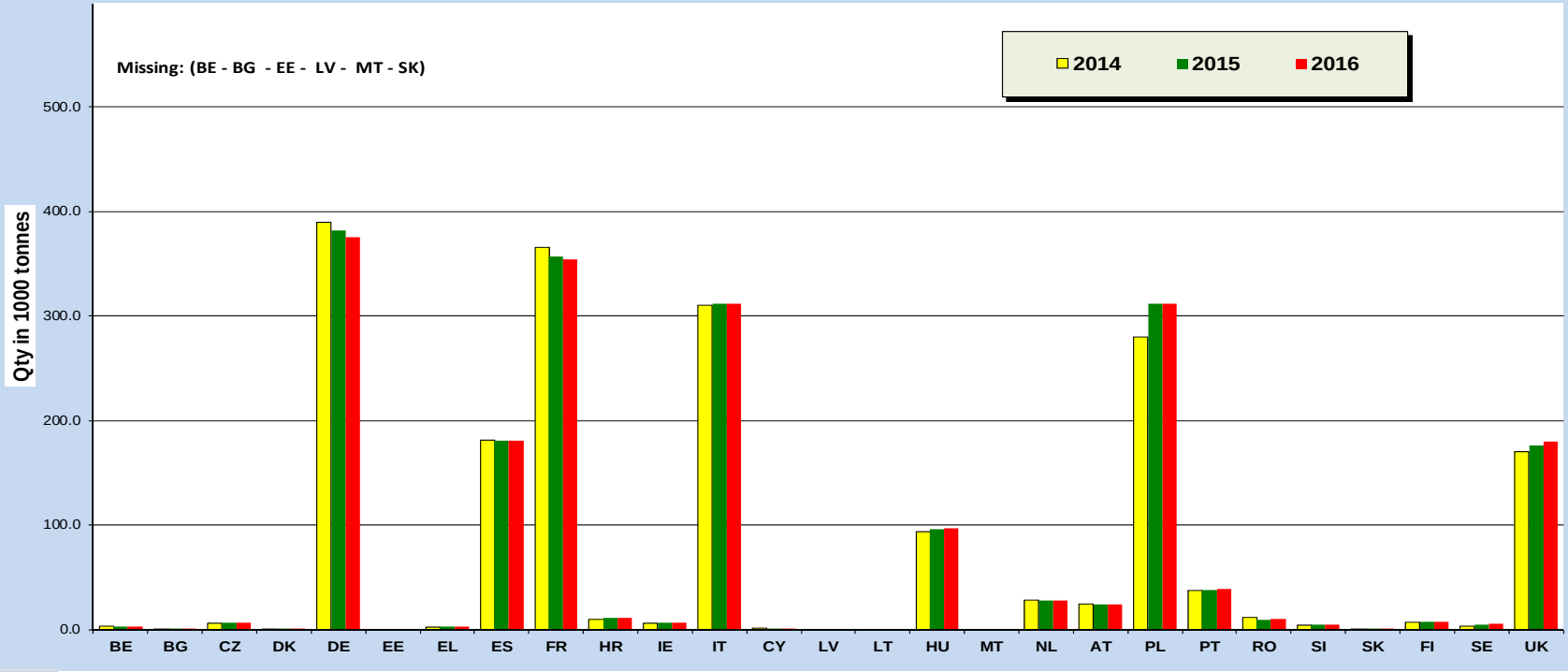
	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	246.0	75.0	162.0	162.0	1290.0	13.8	190.0	1100.0	1149.0	55.7	120.0	885.0	35.0	17.0	58.5	349.1	7.4	936.0	102.1	1930.0	267.0	375.0	56.0	80.1	107.0	108.0	1394.6	11 271.3
%	+ 0.0%	+ 1.4%	+ 0.6%	- 6.1%	+ 2.4%	+ 0.0%	+ 1.1%	+ 4.5%	+ 2.9%	- 3.0%	+ 1.7%	+ 1.5%	+ 0.0%	+ 0.0%	+ 0.0%	+ 6.1%	+ 0.0%	+ 1.1%	+ 12.2%	+ 10.9%	+ 2.1%	+ 1.4%	+ 0.4%	+ 1.5%	+ 0.9%	+ 4.9%	+ 1.2%	+ 3.5%
2016	246.0	75.0	162.0	162.0	1 250.0	13.8	185.0	1 155.0	1 172.0	57.4	122.0	895.0	35.0	17.0	58.5	366.0	7.4	948.0	102.1	2 033.0	269.0	380.0	56.0	80.1	110.0	111.0	1 416.2	11 484.5
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 3.1%	+ 0.0%	- 2.6%	+ 5.0%	+ 2.0%	+ 3.1%	+ 1.7%	+ 1.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 4.8%	+ 0.0%	+ 1.3%	+ 0.0%	+ 5.3%	+ 0.7%	+ 1.3%	+ 0.0%	+ 0.0%	+ 2.8%	+ 2.8%	+ 1.5%	+ 1.9%

Source: According to the data sent by the experts of the forecast group

European Commission

Experts EU production forecast of Turkey Meat

2015: 1 966.0 th T (+ 1.5 %) & 2016: 1 961.8 th T (- 0.2 %)



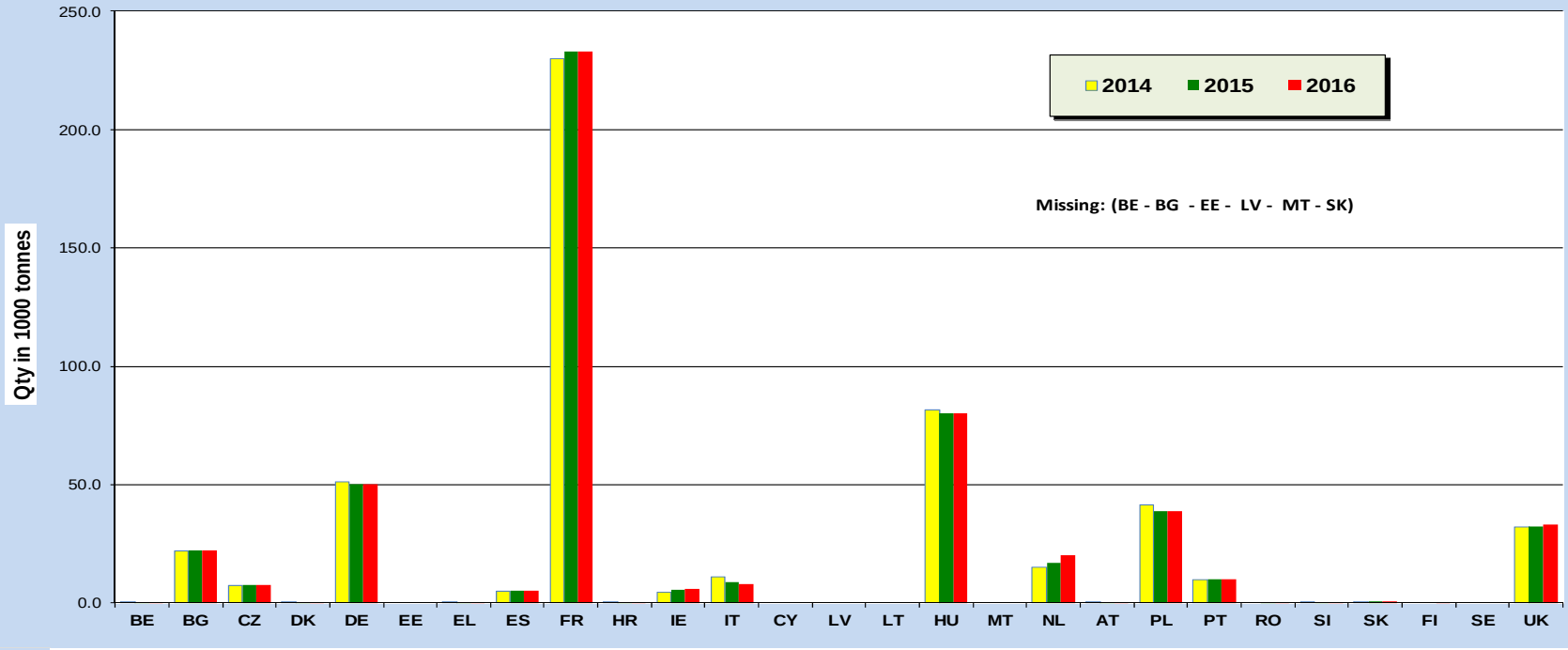
	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	3.3	0.1	6.5	0.3	382.0	0.0	2.5	181.0	357.0	11.0	7.0	312.0	1.2	0.0	0.0	96.3	0.0	28.0	24.5	312.0	38.0	9.0	4.6	1.0	7.3	5.0	176.4	**1 966.0**
%	+ 0.0%	+ 0.0%	+ 3.2%	+ 0.0%	- 2.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 2.4%	+ 13.4%	+ 7.7%	+ 0.6%	+ 0.0%	+ 0.0%	+ 0.0%	+ 3.2%	+ 0.0%	+ 0.0%	+ 0.0%	+ 11.4%	+ 1.6%	- 25.0%	+ 0.0%	+ 0.0%	+ 1.4%	+ 47.1%	+ 3.8%	+ 1.5%
2016	3.3	0.1	6.5	0.3	375.0	0.0	2.5	181.0	354.0	11.3	6.5	312.0	1.2	0.0	0.0	96.5	0.0	28.0	24.5	312.0	39.0	10.0	4.6	1.0	7.3	5.3	179.9	**1 961.8**
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 1.8%	+ 0.0%	+ 0.0%	+ 0.0%	- 0.8%	+ 2.7%	- 7.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.2%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 2.6%	+ 11.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 6.0%	+ 2.0%	- 0.2%

Source: According to the data sent by the experts of the forecast group

European Commission

Experts EU production forecast of Duck Meat

2015: 511.5 th T (- 0.1 %) & 2016: 514.8 thT (+ 0.6 %)



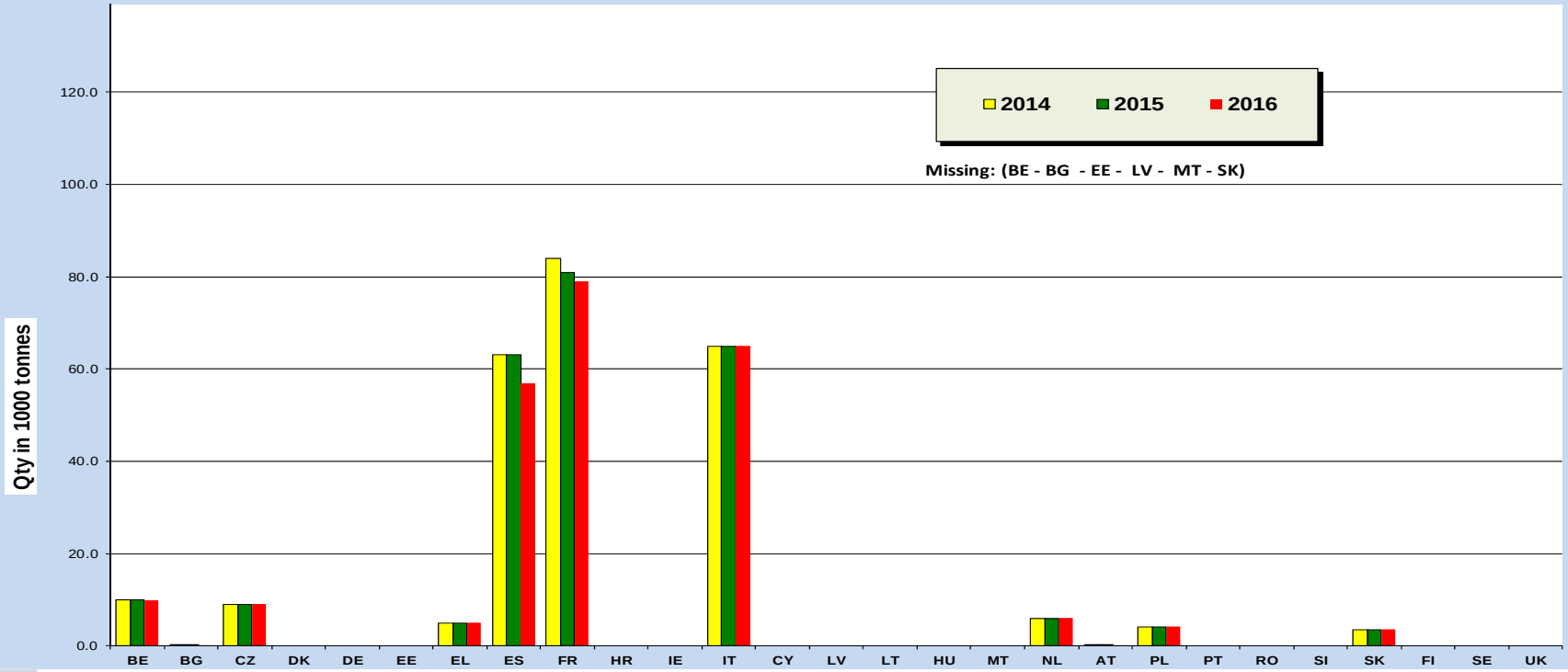
	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	0.0	22.0	7.5	0.1	50.0	0.0	0.1	5.0	232.9	0.1	5.4	9.0	0.0	0.0	0.0	80.0	0.0	17.0	0.1	39.0	10.0	0.1	0.0	0.6	0.0	0.0	32.5	511.5
%	+ 0.0%	+ 0.0%	+ 2.7%	+ 0.0%	- 2.3%	+ 0.0%	+ 0.0%	+ 0.0%	+ 1.2%	- 50.0%	+ 20.0%	- 18.2%	+ 0.0%	+ 0.0%	+ 0.0%	- 1.7%	+ 0.0%	+ 13.3%	+ 0.0%	- 6.0%	+ 3.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 1.2%	- 0.1%
2016	0.0	22.0	7.5	0.1	50.0	0.0	0.1	5.0	233.0	0.1	5.8	8.0	0.0	0.0	0.0	80.0	0.0	20.0	0.1	39.0	10.0	0.1	0.0	0.6	0.1	0.0	33.2	514.8
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 7.4%	- 11.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 17.6%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 2.2%	+ 0.6%

Source: According to the data sent by the experts of the forecast group

European Commission

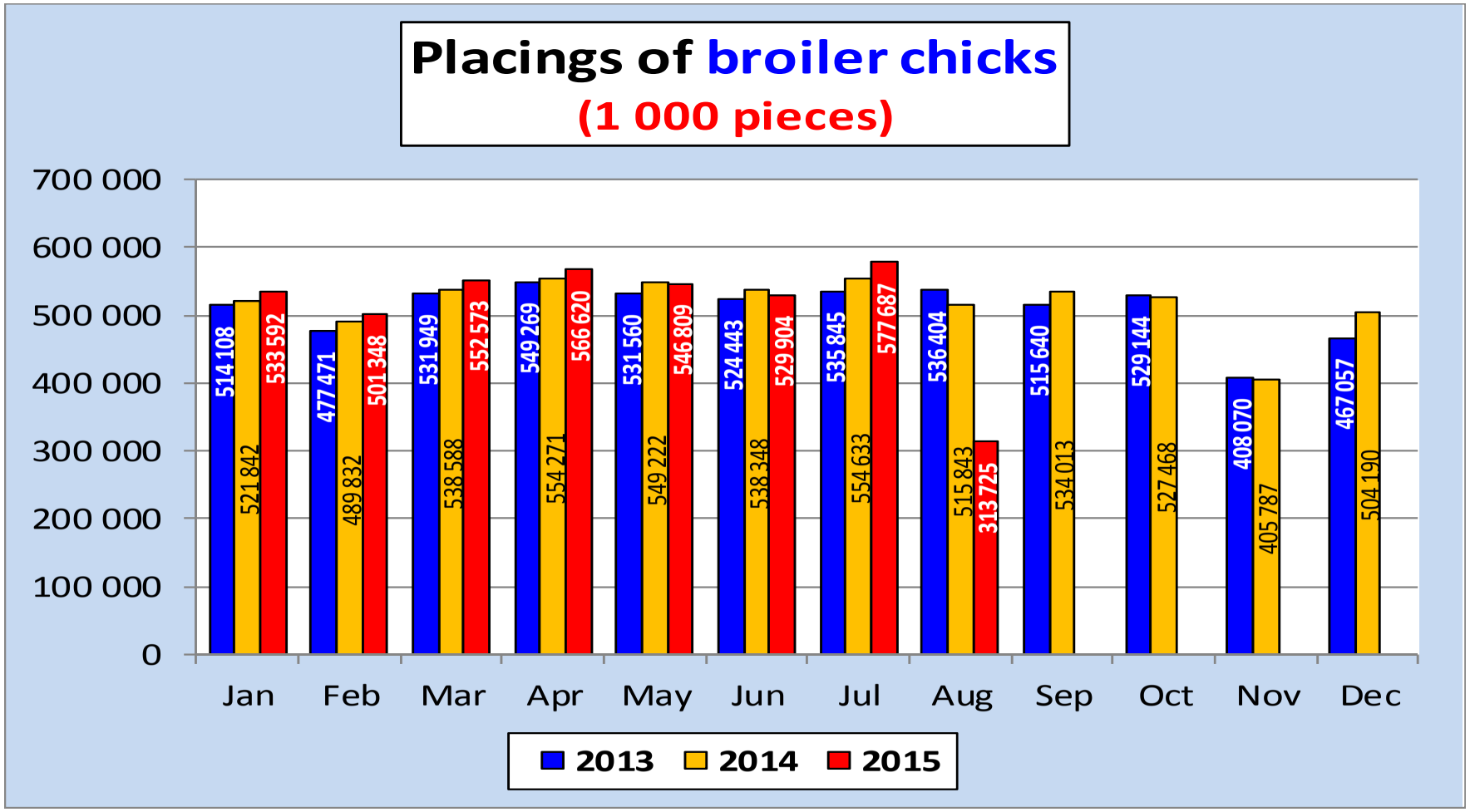
Experts EU production forecast of Rabbit Meat

2015: 247 th T (- 1.2 %) & 2016: 239 thT (- 3.2 %)



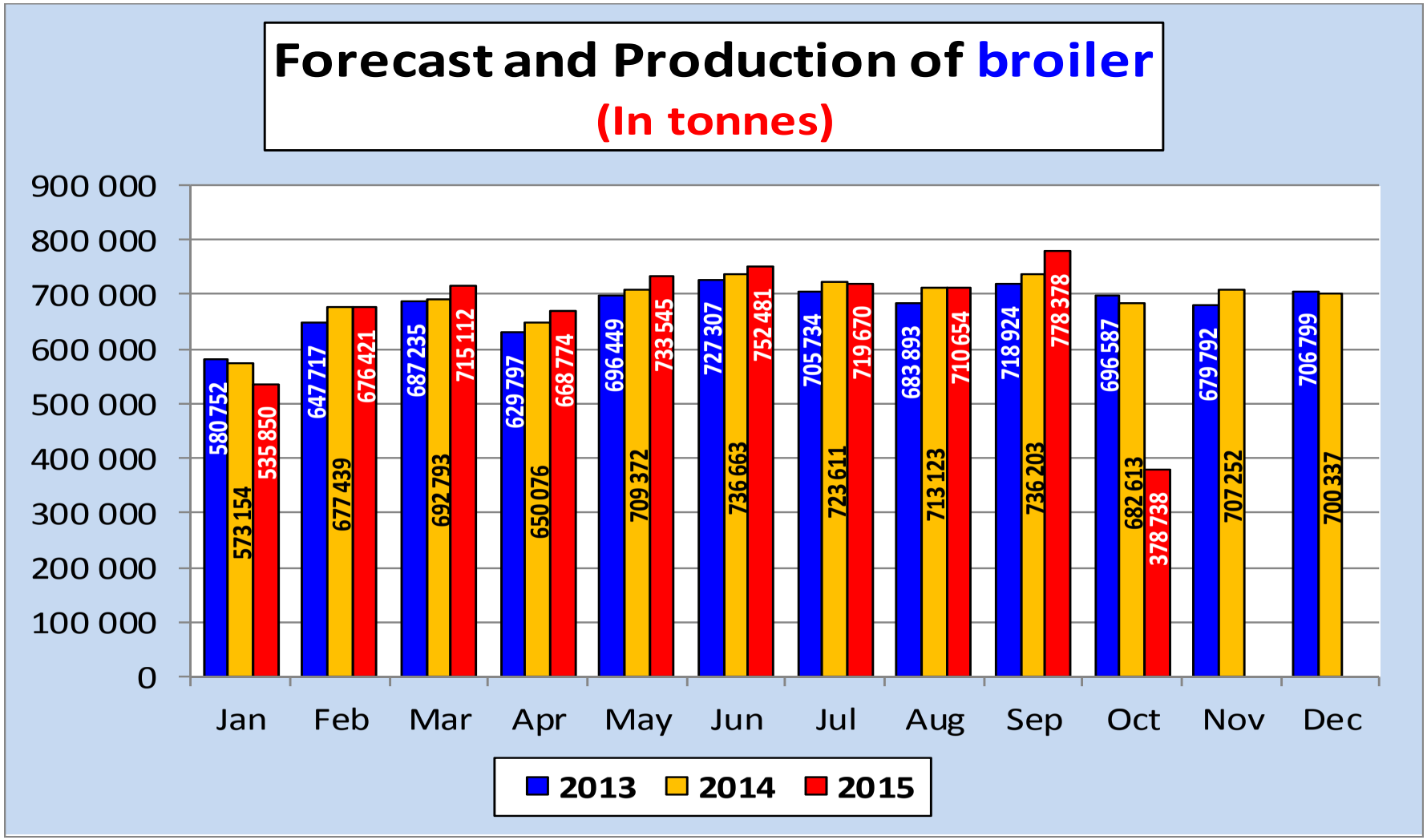
	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	10.0	0.0	9.0	0.0	0.0	0.0	5.0	63.0	81.0	0.0	0.0	65.0	0.0	0.0	0.0	0.0	0.0	6.0	0.2	4.2	0.0	0.0	0.0	3.6	0.0	0.0	0.0	**247.0**
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 3.6%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 1.2%
2016	10.0	0.0	9.0	0.0	0.0	0.0	5.0	57.0	79.0	0.0	0.0	65.0	0.0	0.0	0.0	0.0	0.0	6.0	0.2	4.2	0.0	0.0	0.0	3.6	0.0	0.0	0.0	**239.0**
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 9.5%	- 2.5%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 3.2%

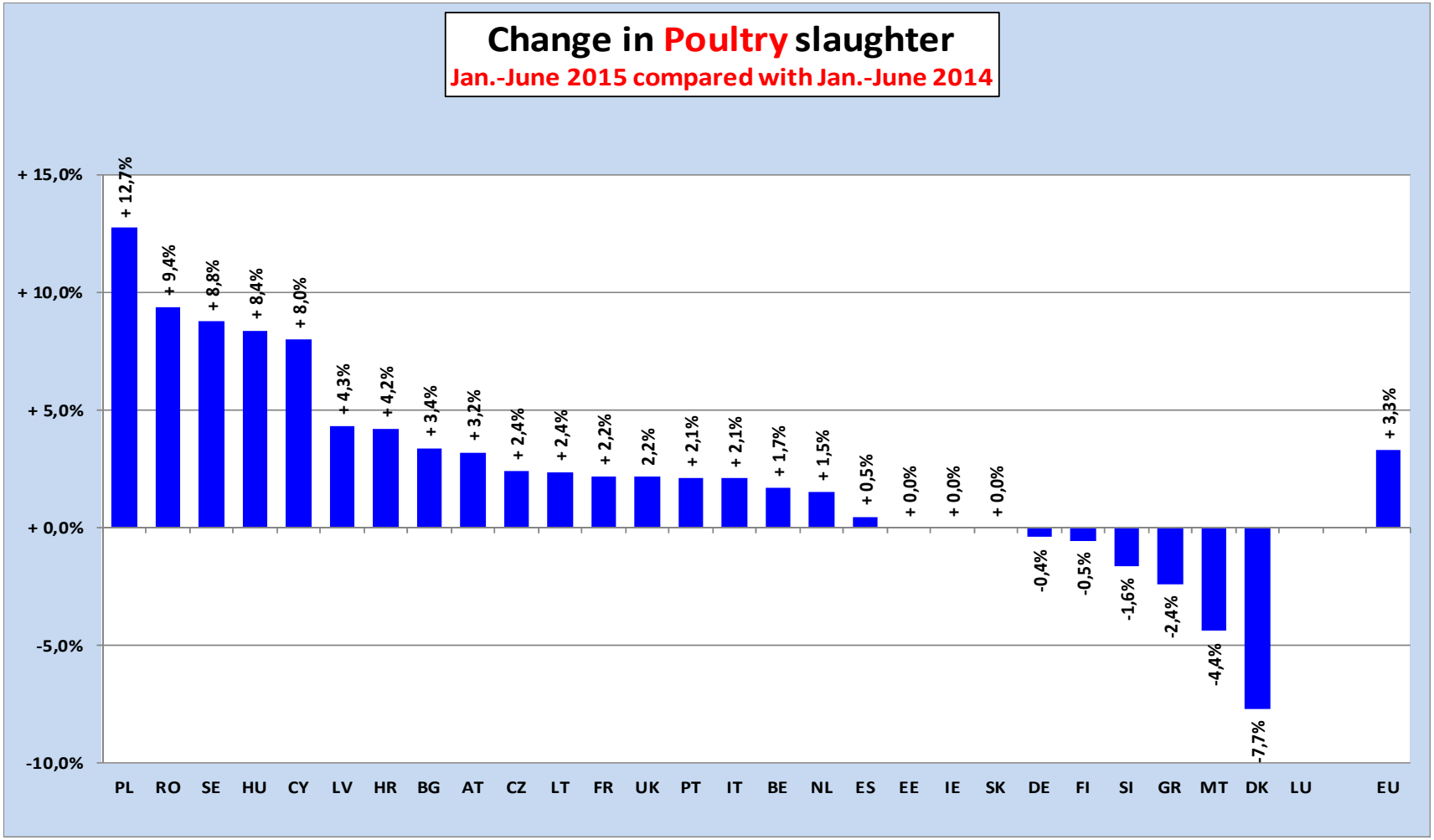
Source: According to the data sent by the experts of the forecast group

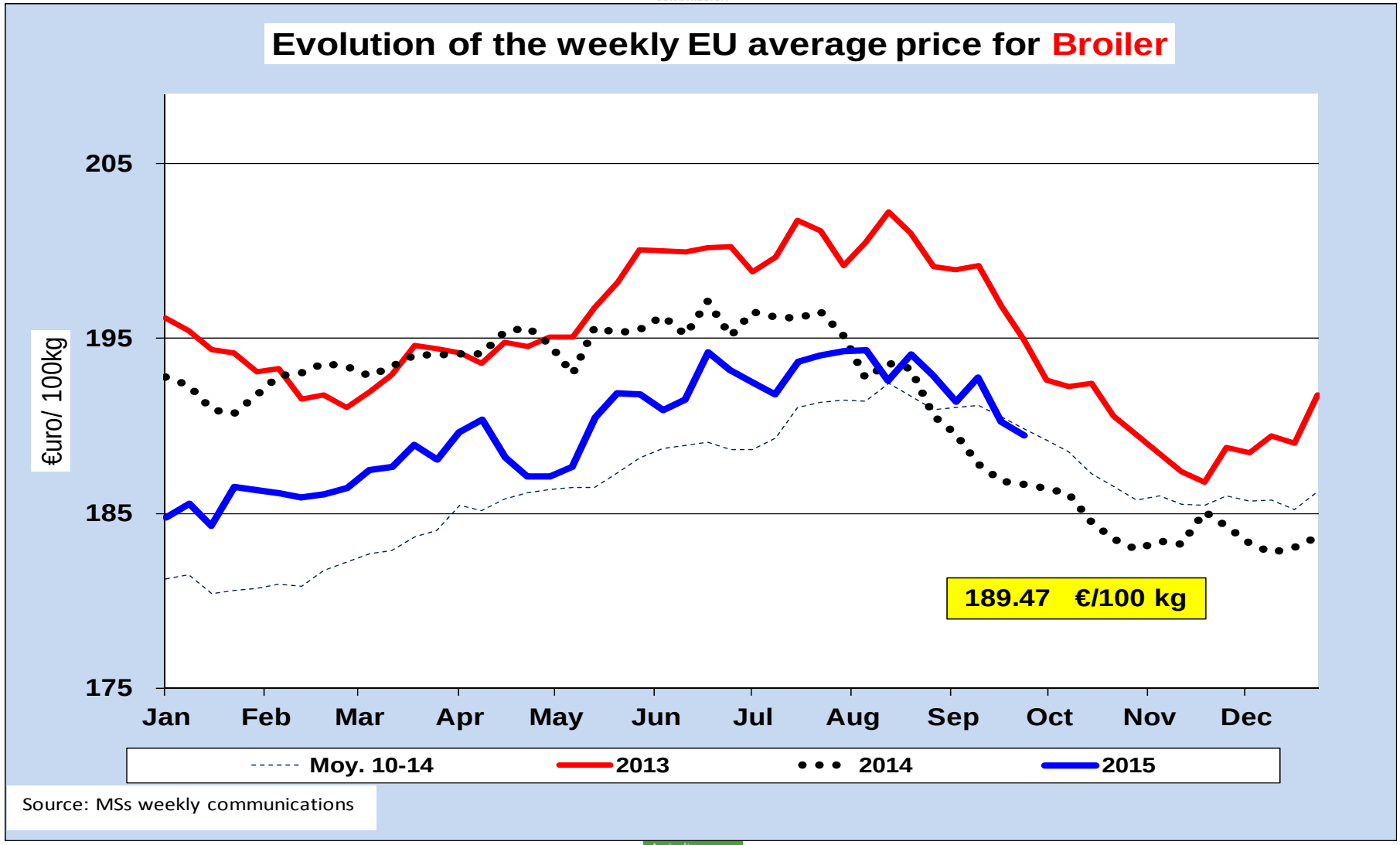

Placings of broiler chicks
(1 000 pieces)
700 000
600 000
500 000
400 000
300 000
200 000
100 000
0
514 108
521 842
533 592
477 471
489 832
501 348
531 949
538 588
552 573
549 269
554 271
566 620
531 560
549 222
546 809
524 443
538 348
529 904
535 845
554 633
577 687
536 404
515 843
313 725
515 640
534 013
529 144
527 468
408 070
405 787
467 057
504 190
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2013
2014
2015

Parameters for the calculation of the estimated production of broilers

	BE	BG	CZ	DK	DE	EE	GR	ES	FR	HR	IE	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK
Parameter	2013																											
National Average Live weight (kg) at Slaughter	2,40	2,10	1,90	2,10	2,11	2,39	2,40	2,66	2,02	1,99	2,04	2,60	2,64	2,10	2,44	2,40	2,33	2,55	2,23	1,83	2,44	1,85	2,20	2,20	2,12	2,34	1,91	2,23
National Average Carcass yield (%)	68%	73,0%	74,0%	75,0%	70,0%	71,0%	75,0%	70,2%	67,0%	69,4%	71,7%	70,1%	77,0%	74,4%	75,1%	68%	70,1%		74,0%	66,0%	75,0%	69,9%	72,4%	70,5%	72,5%	72,5%	75,0%	69,0%
National Average Mortality (%)	2,0%	4,3%	4,0%	2,5%	3.0-3.5% (l.w) 4.0% (h.w.)	2,5% - 3,0%	6,0%	5,2%	4,2%	3,7%	2,9%	5,0%	3,2%	3,3%	5,0%	2,0%	4,2%	6,5%	3,5%	4,2%	4,2%	2,6%	2,5%	3,9%	3,5%	3,5%		4,8%
National Average Period of rearing (days)	40,0	51*	35,0	35,0	30 - 38	37 - 40	45,0	43,5	37,7	35,0	36,9	35/46	47,4	37,1	40,0	40,0	41,5	45,0	41,0	35,00	42,0	37,8	41,0	37,7	38,5	37,0		42,0

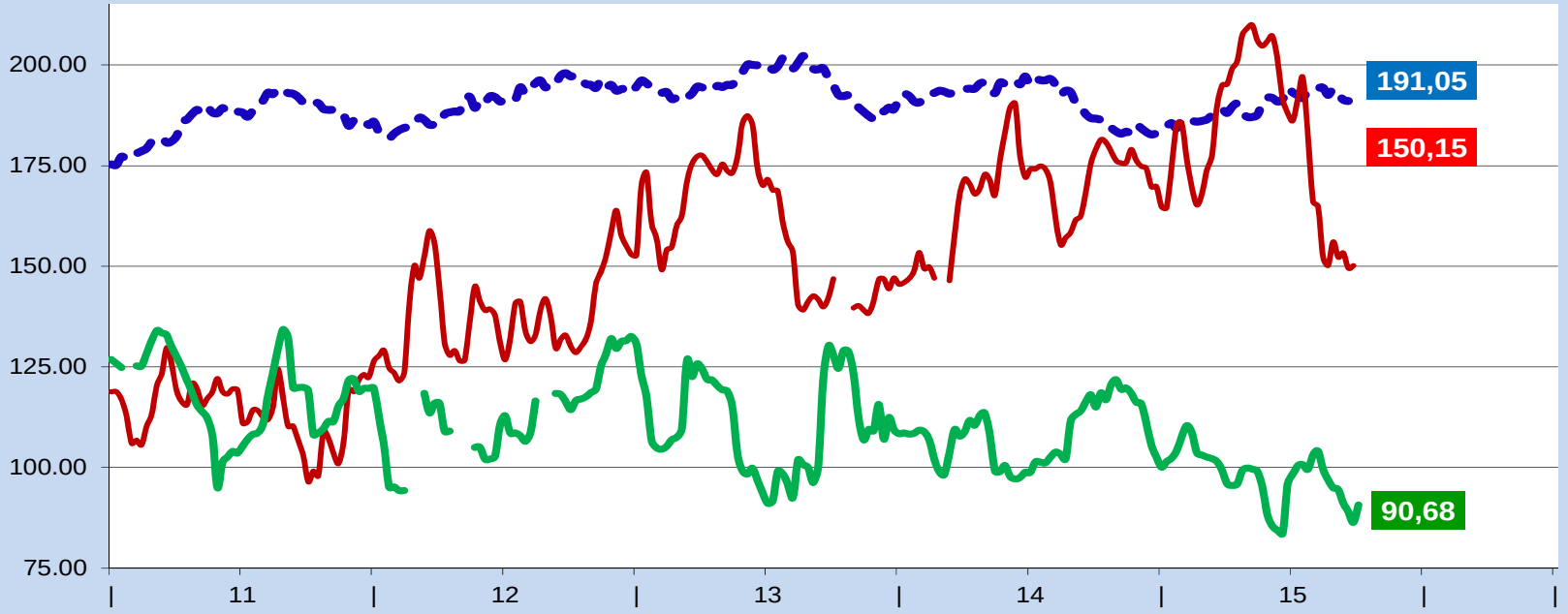

Forecast and Production of broiler
(In tonnes)
900 000
800 000
700 000
600 000
500 000
400 000
300 000
200 000
100 000
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
580 752
573 154
535 850
647 717
677 439
676 421
687 235
692 793
715 112
629 797
650 076
668 774
696 449
709 372
733 545
727 307
736 663
752 481
705 734
723 611
719 670
683 893
713 123
710 654
718 924
736 203
778 378
696 587
682 613
378 738
679 792
707 252
706 799
700 337
2013
2014
2015


Change in Poultry slaughter
Jan.-June 2015 compared with Jan.-June 2014
+ 15,0%
+ 10,0%
+ 5,0%
+ 0,0%
-5,0%
-10,0%
+ 12,7%
+ 9,4%
+ 8,8%
+ 8,4%
+ 8,0%
+ 4,3%
+ 4,2%
+ 3,4%
+ 3,2%
+ 2,4%
+ 2,4%
+ 2,2%
2,2%
+ 2,1%
+ 2,1%
+ 1,7%
+ 1,5%
+ 0,5%
+ 0,0%
+ 0,0%
+ 0,0%
-0,4%
-0,5%
-1,6%
-2,4%
-4,4%
-7,7%
+ 3,3%
PL RO SE HU CY LV HR BG AT CZ LT FR UK PT IT BE NL ES EE IE SK DE FI SI GR MT DK LU EU


Evolution of the weekly EU average price for Broiler
€uro/ 100kg
205
195
185
175
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
189.47 €/100 kg
Moy. 10-14
2013
2014
2015
Source: MSs weekly communications

European Commission

Broiler prices in EU, USA and Brazil in €uro/ 100kg

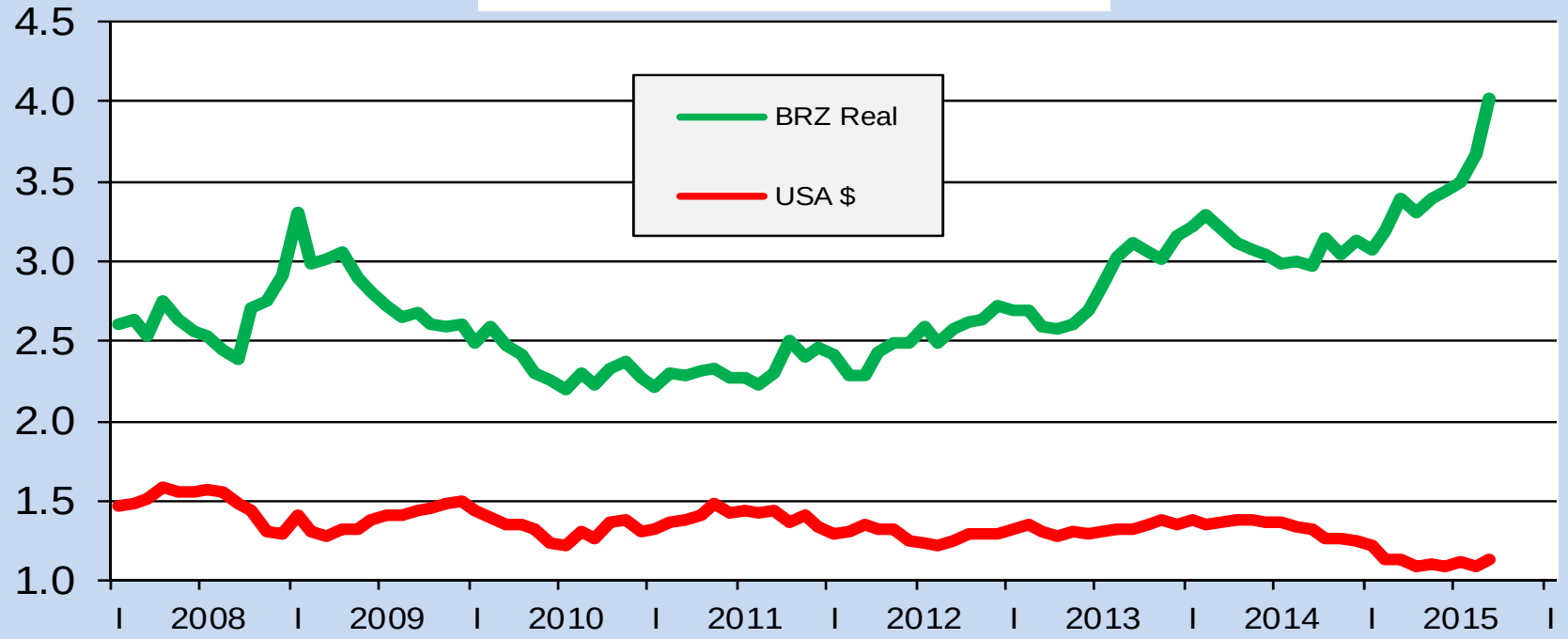


EU = weighted avg of MS prices Broiler 65%
US = weekly USDA prices Fresh chicken grade A ,Chicago
BR = avg of prices in main producing states (Aveworld.com.br)

EU broiler
US broiler €uro
BR Broil €uro/ (Ave world)

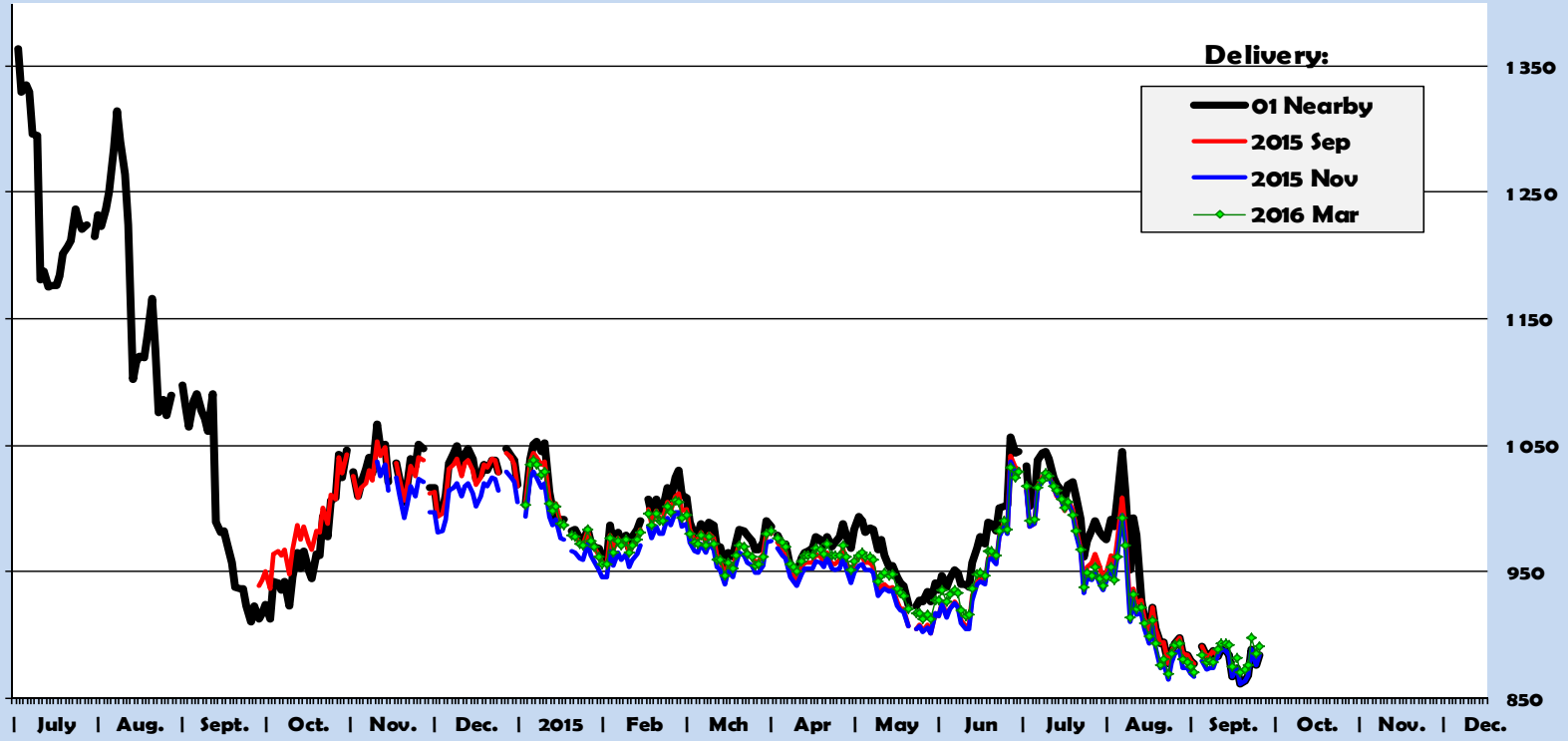
€uro Exchange rate

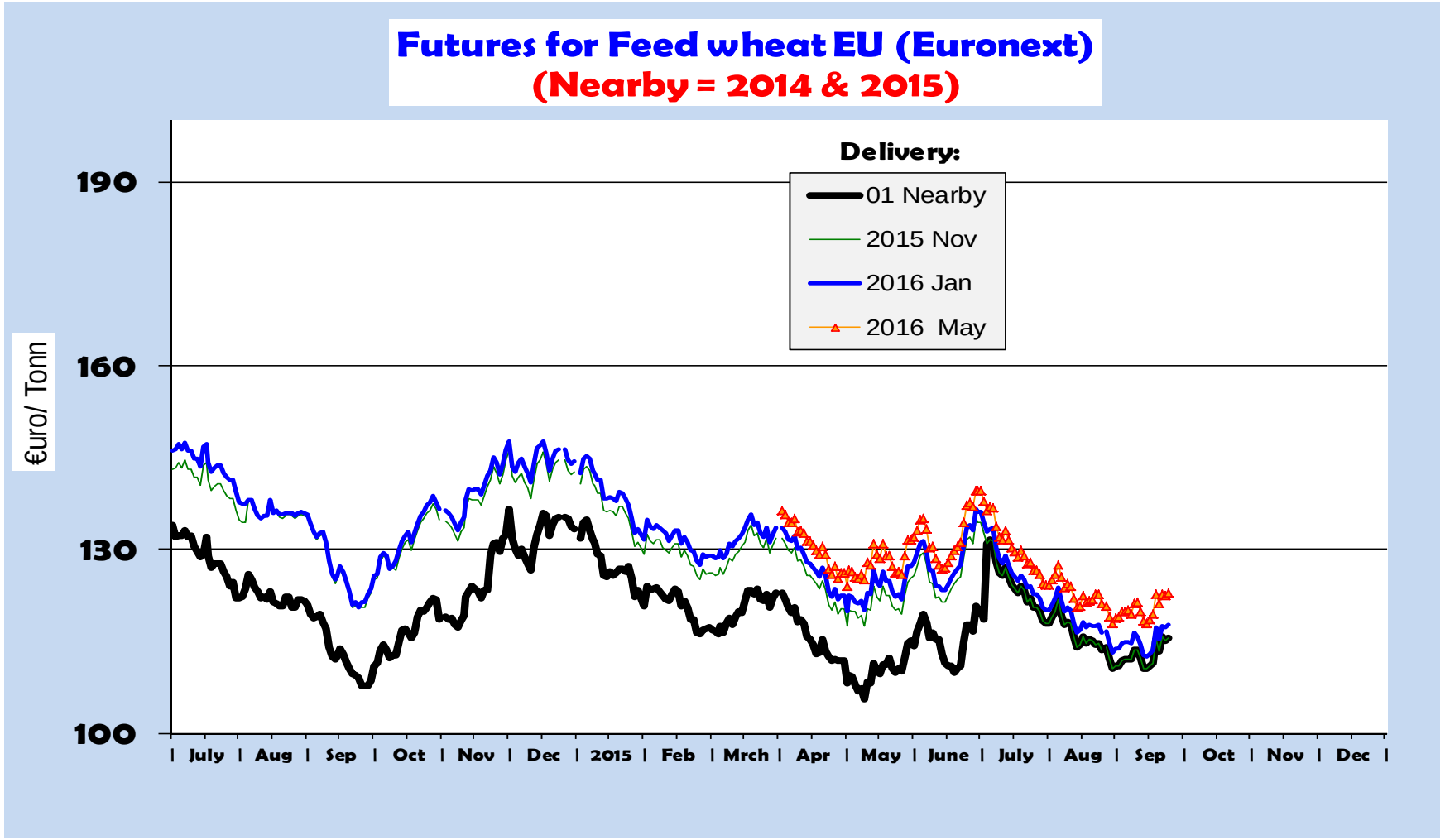
1 Euro = ...US$ / BRZ Real/



source:http://europa.eu.int/comm/budget/inforeuro/fr/index.htm

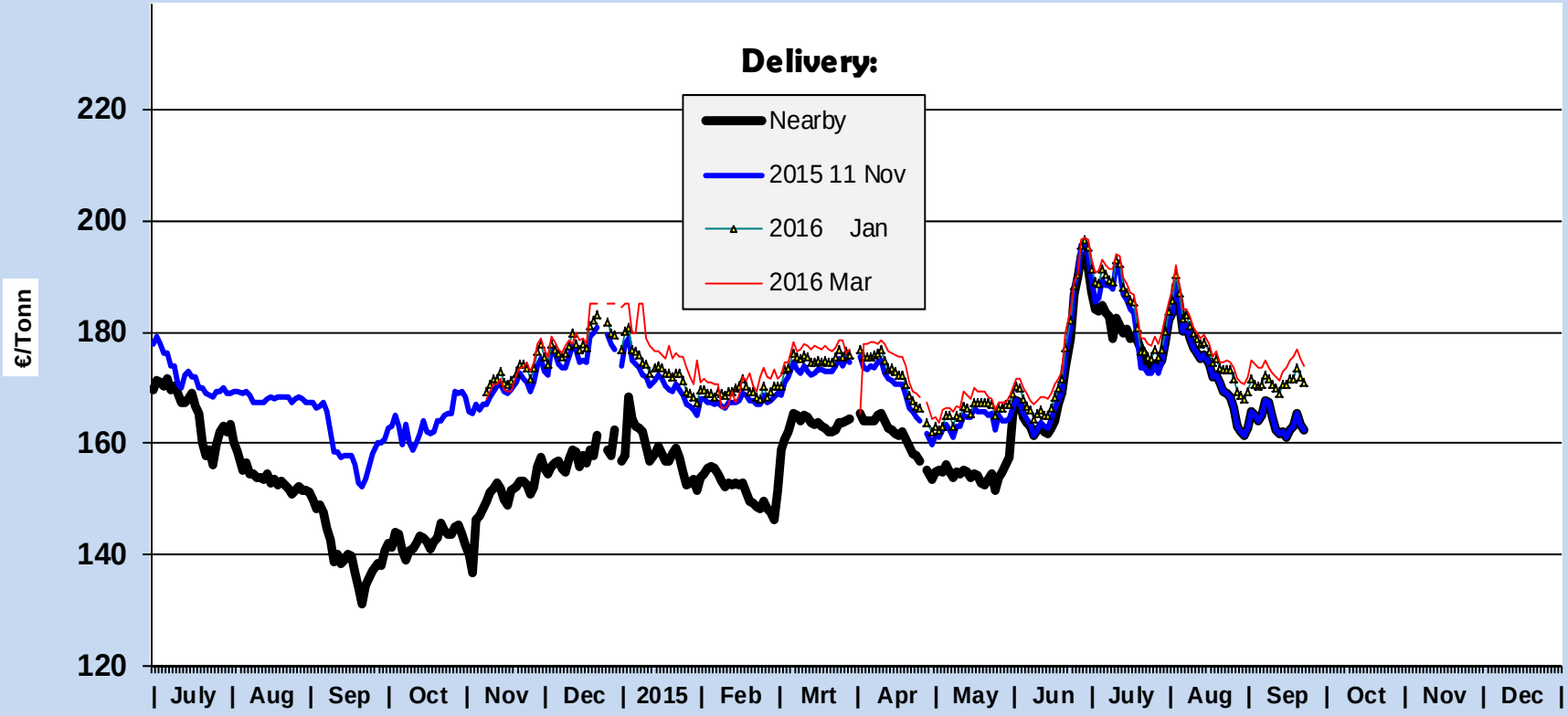
Futures for Soybeans in US$ct/ Bushel (nearby = 2013 & 2014)



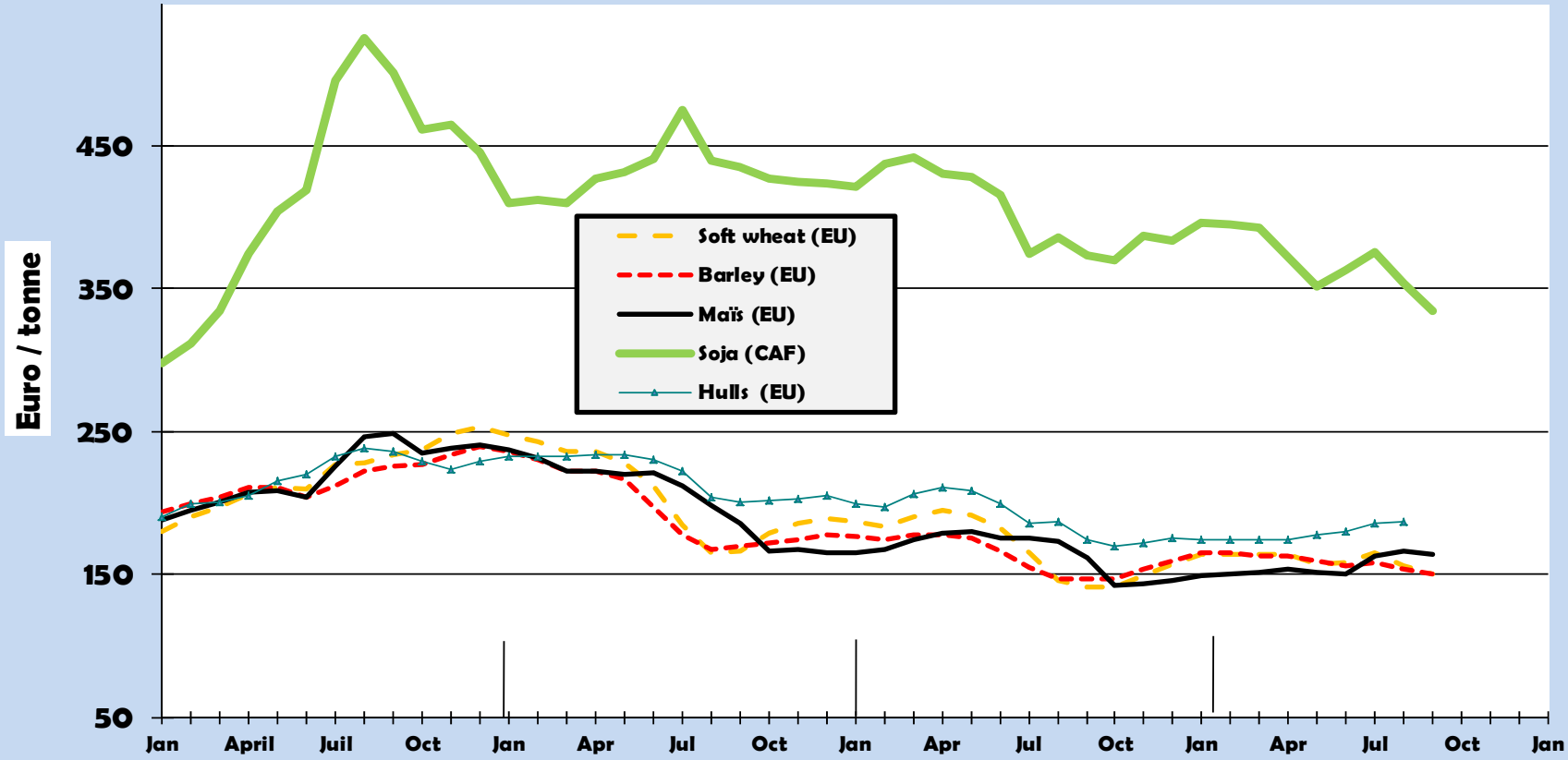

Futures for Feed wheat EU (Euronext)
(Nearby = 2014 & 2015)
Delivery:
01 Nearby
2015 Nov
2016 Jan
2016 May
€uro/ Tonn
190
160
130
100
July
Aug
Sep
Oct
Nov
Dec
2015
Feb
Mrch
Apr
May
June
July
Aug
Sep
Oct
Nov
Dec

Futures for Maize EU (Euronext)

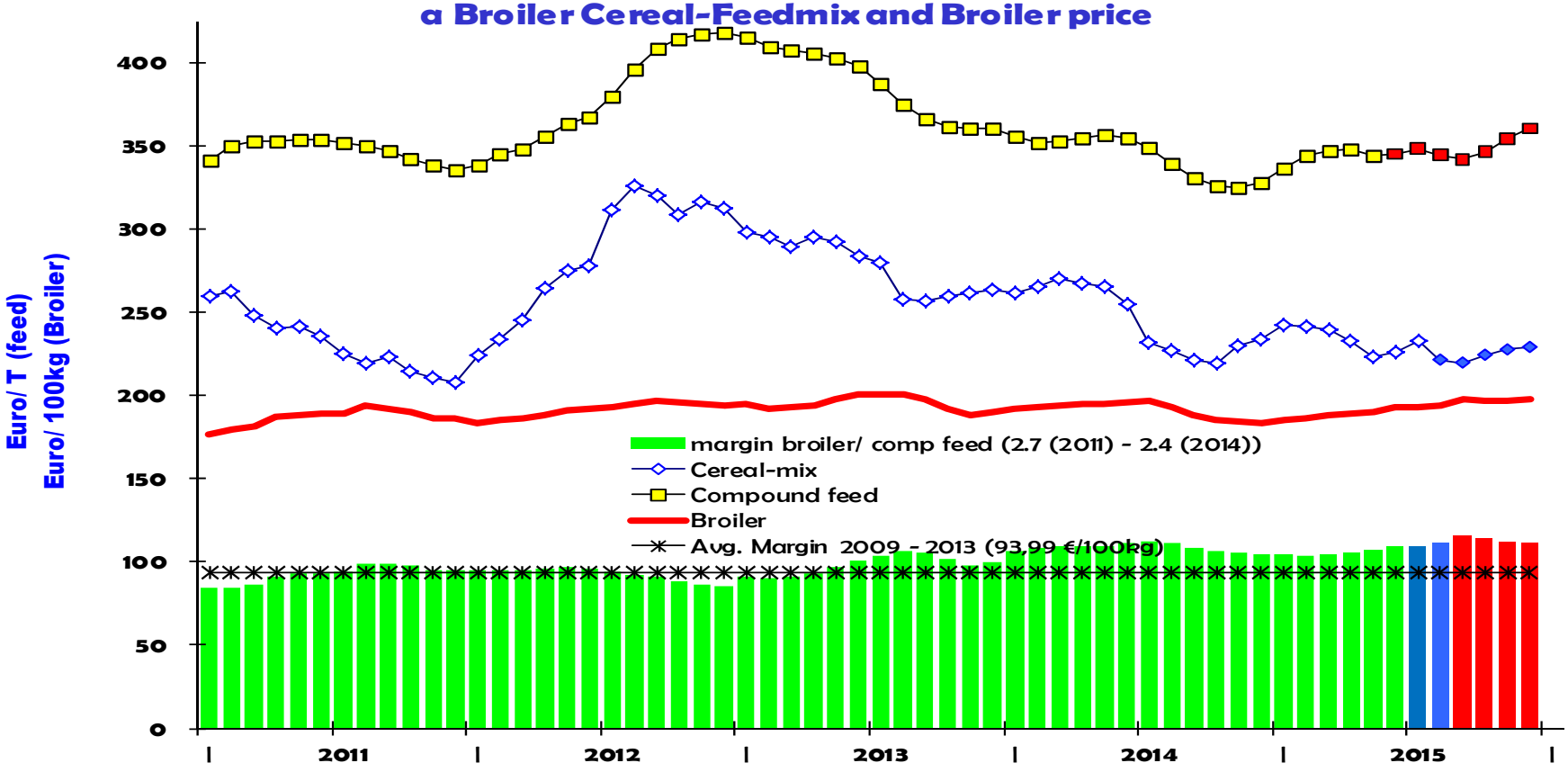
(Nearby = 2014 - 2015)



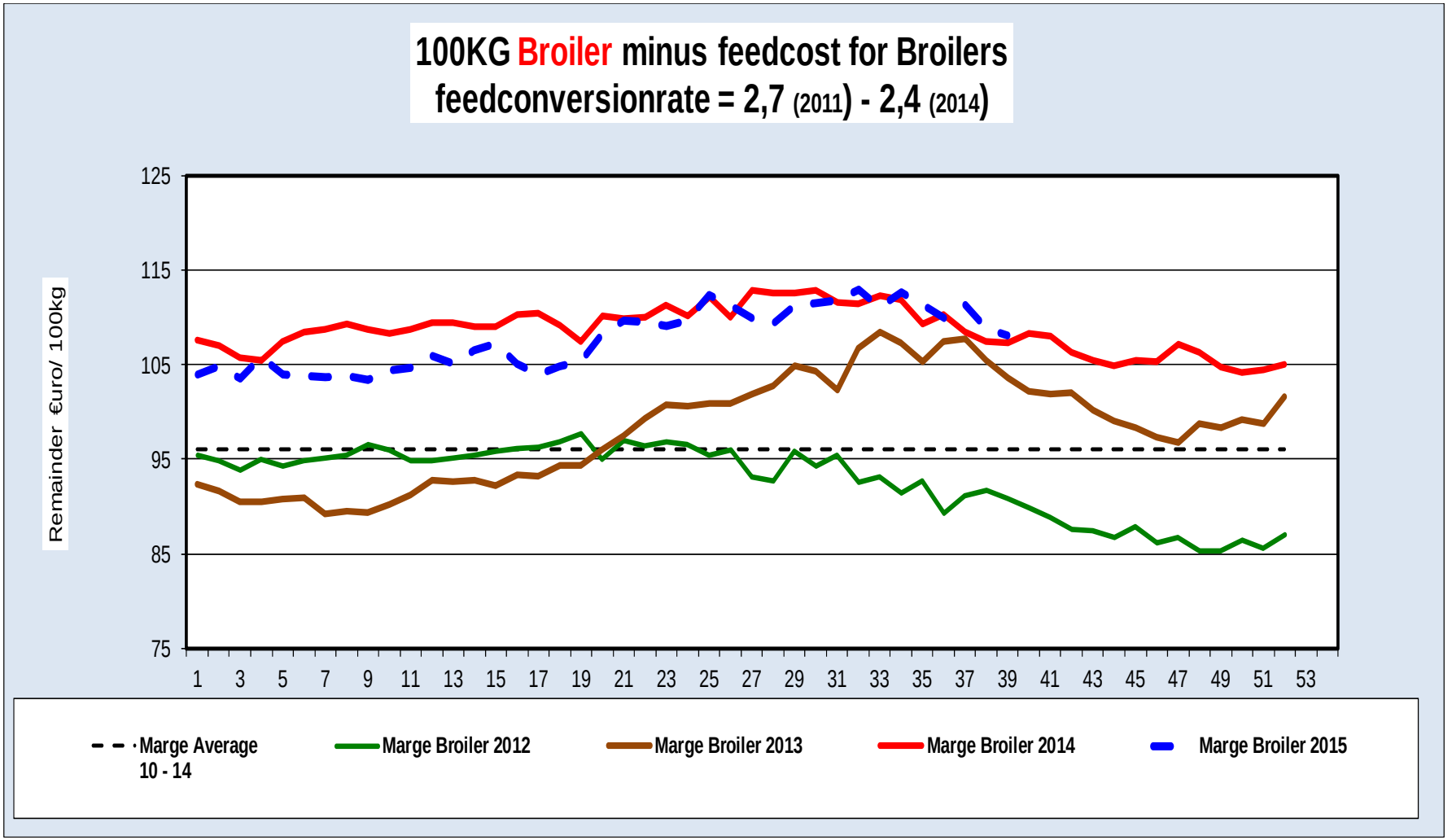
Price of Basic Ingredients 2012 - 2015



Price development of Compound feed for Broilers, a Broiler Cereal-Feedmix and Broiler price



NB. Comp. Feed 2014 =Forecast as from February 2015.
Cereal mix and Poultry = Forecast as from June 2015.


100KG Broiler minus feedcost for Broilers
feedconversionrate = 2,7 (2011) - 2,4 (2014)
Remainder €uro/ 100kg
125
115
105
95
85
75
1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 31 33 35 37 39 41 43 45 47 49 51 53
Marge Average 10 - 14
Marge Broiler 2012
Marge Broiler 2013
Marge Broiler 2014
Marge Broiler 2015

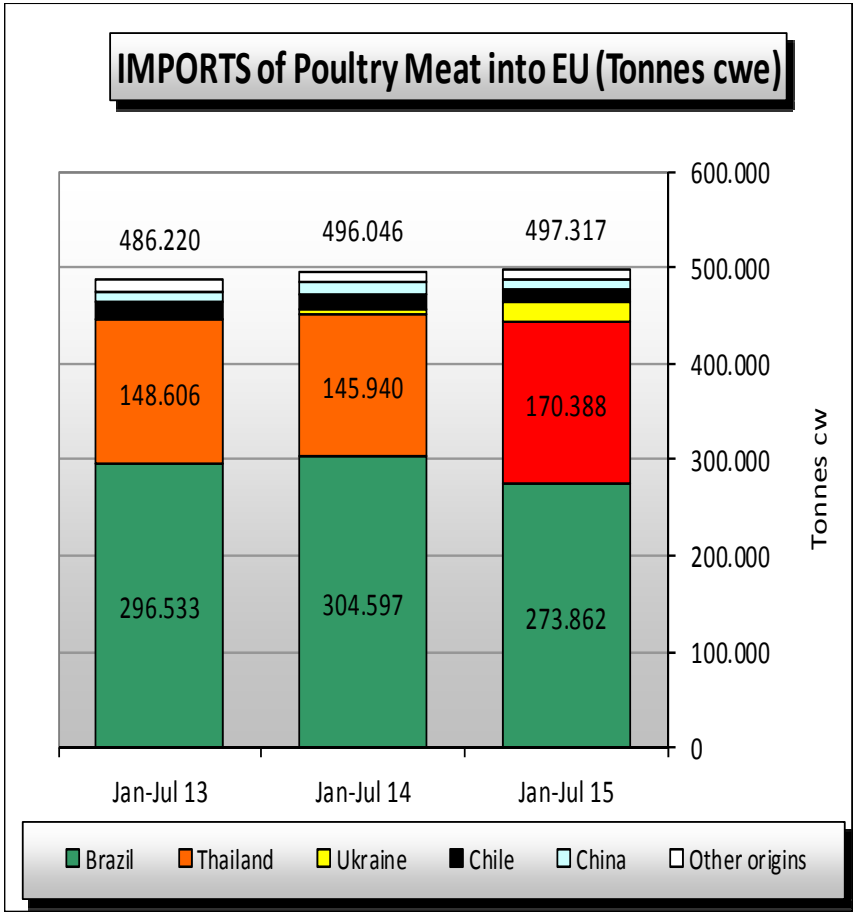
TRADE

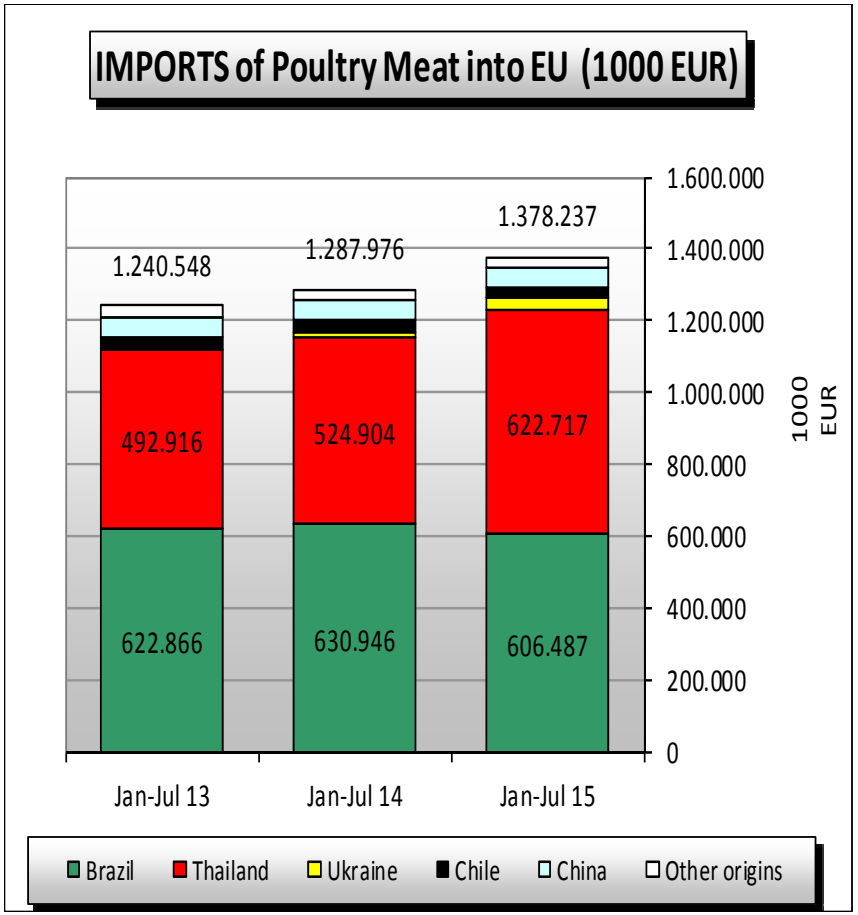
Agriculture
and Rural
Development

Imports of Poultry meat from selected origins

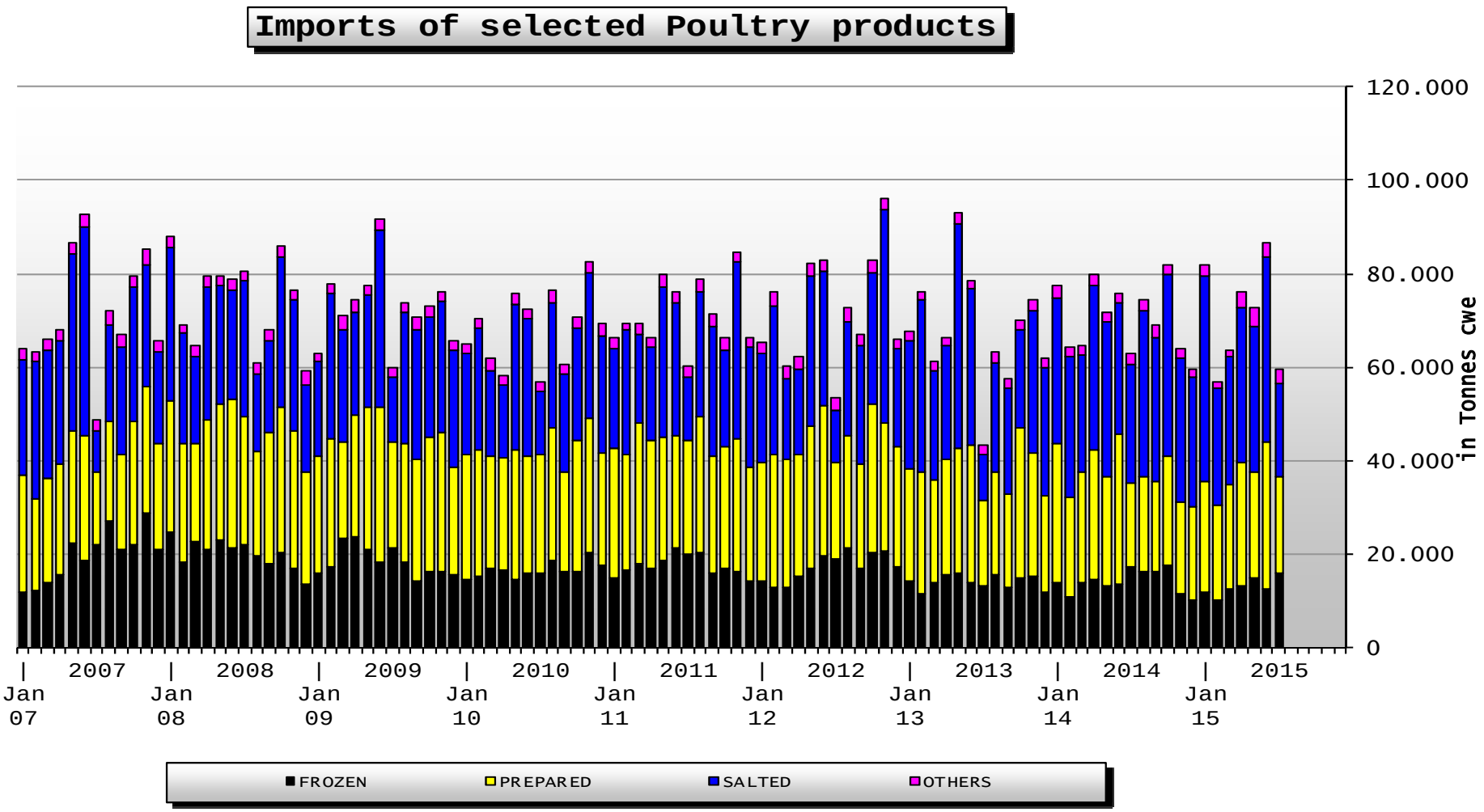
	2011		2012		2013		2014		Jan-Jul 15		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jul 14
Brazil	615.832	71,9%	583.449	67,3%	514.339	63,2%	500.569	59,7%	273.862	55,1%	- 10%
Thailand	155.788	18,2%	197.962	22,8%	228.238	28,0%	250.338	29,9%	170.388	34,3%	+ 17%
Ukraine	31	0,0%			276	0,0%	19.928	2,4%	20.972	4,2%	+++
Chile	44.433	5,2%	42.192	4,9%	30.515	3,7%	25.801	3,1%	11.572	2,3%	- 28%
China	13.874	1,6%	15.698	1,8%	18.145	2,2%	19.703	2,4%	10.440	2,1%	- 14%
Argentina	15.700	1,8%	13.766	1,6%	10.783	1,3%	10.993	1,3%	5.206	1,0%	- 15%
Switzerland	1.253	0,1%	3.817	0,4%	3.817	0,5%	4.234	0,5%	1.523	0,3%	- 43%
USA	129	0,0%	352	0,0%	193	0,0%	43	0,0%	861	0,2%	+++
Others	10.051	1,2%	9.968	1,1%	7.525	0,9%	6.326	0,8%	2.493	0,5%	
EXTRA EU 28	857.092		867.203		813.832		837.935		497.317		
% change			+ 1%		- 6%		+ 3%		+ 0,3%		

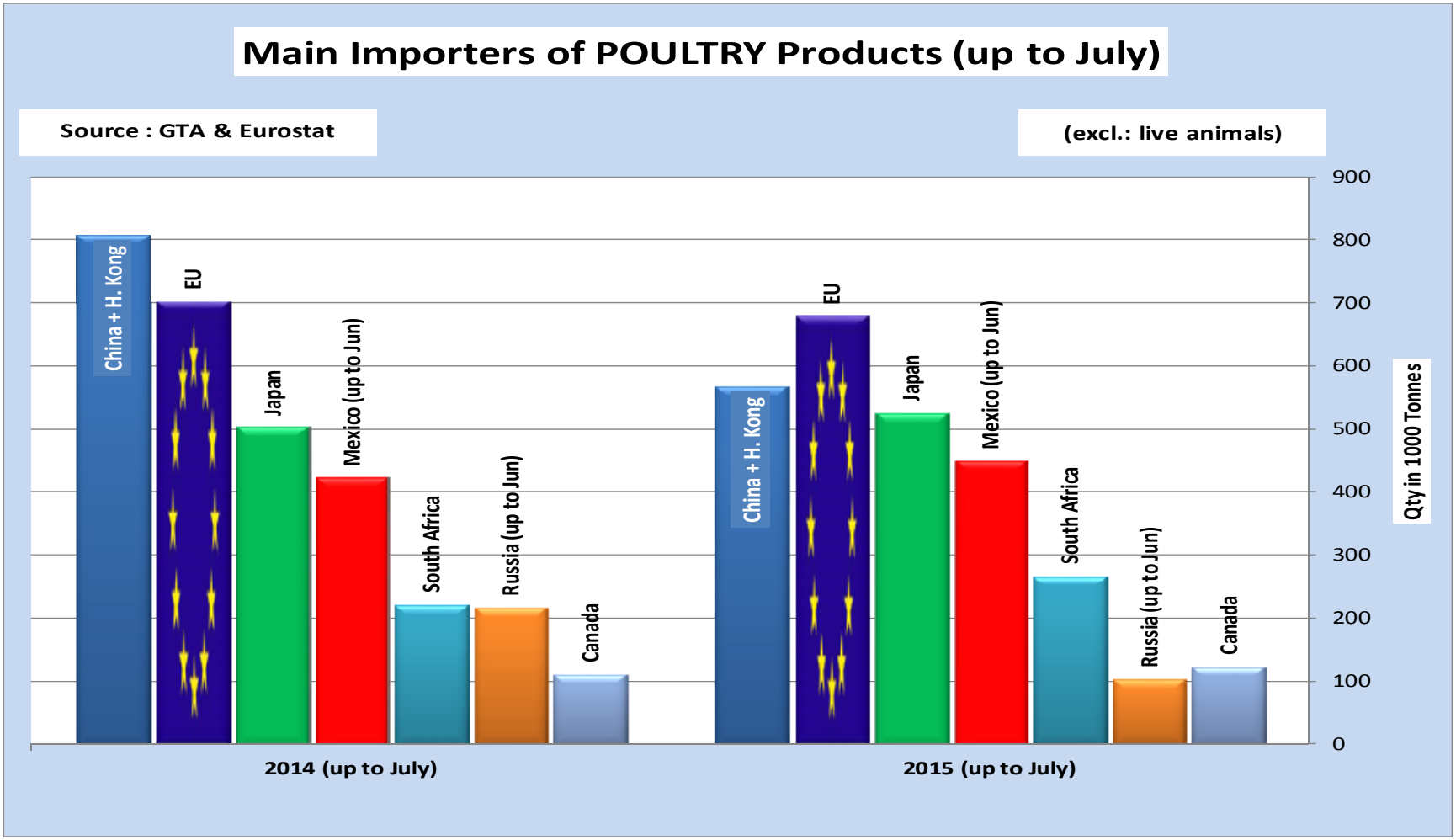
EU Poultry meat Imports





Imports of selected Poultry products

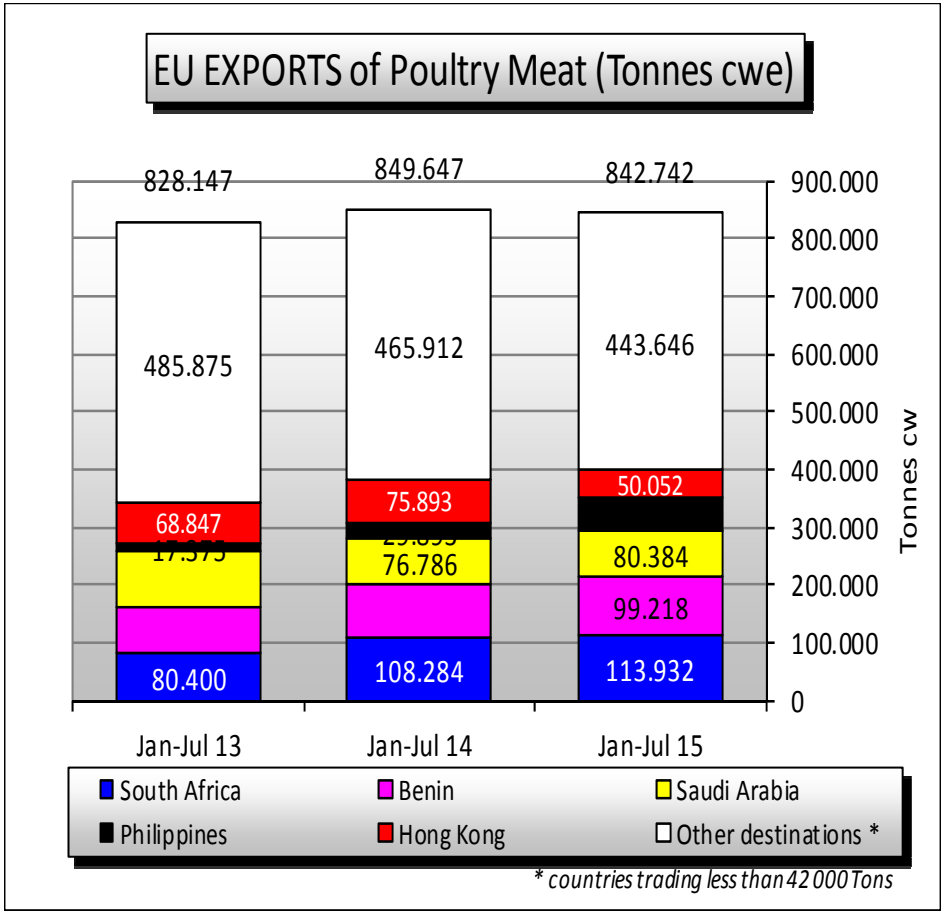


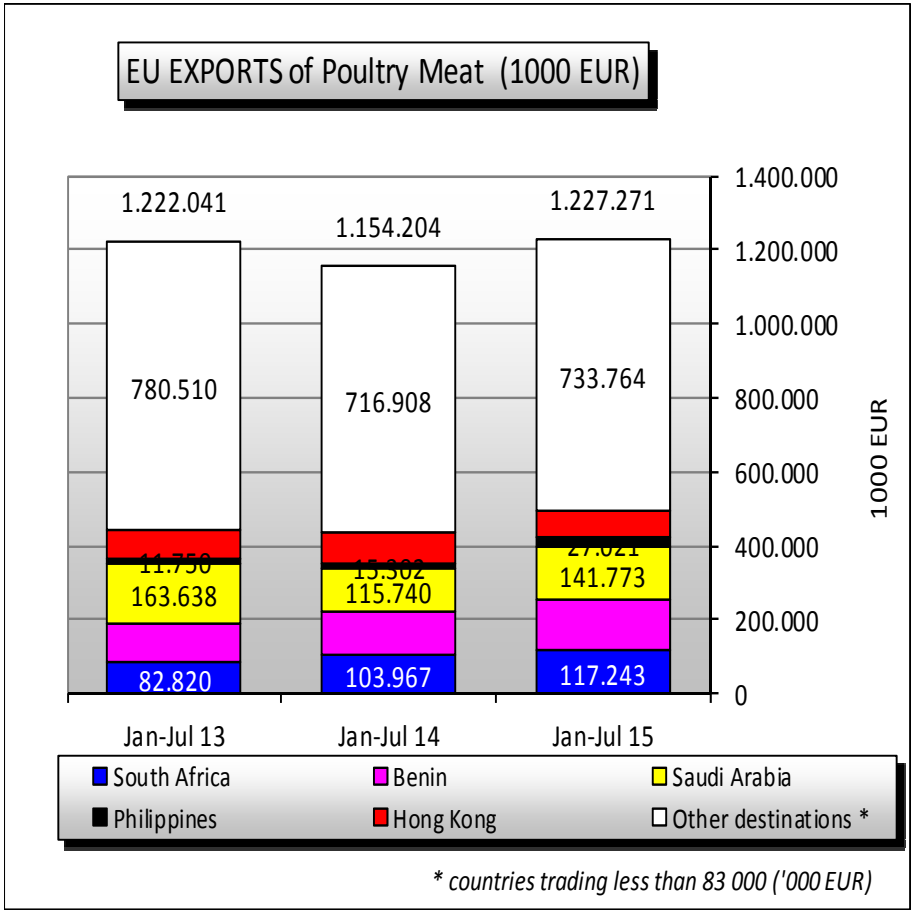

Main Importers of POULTRY Products (up to July)
Source : GTA & Eurostat
(excl.: live animals)
China + H. Kong
EU
Japan
Mexico (up to Jun)
South Africa
Russia (up to Jun)
Canada
2014 (up to July)
2015 (up to July)
900
800
700
600
500
400
300
200
100
0
Qty in 1000 Tonnes

Exports of Poultry Meat to Selected Destinations

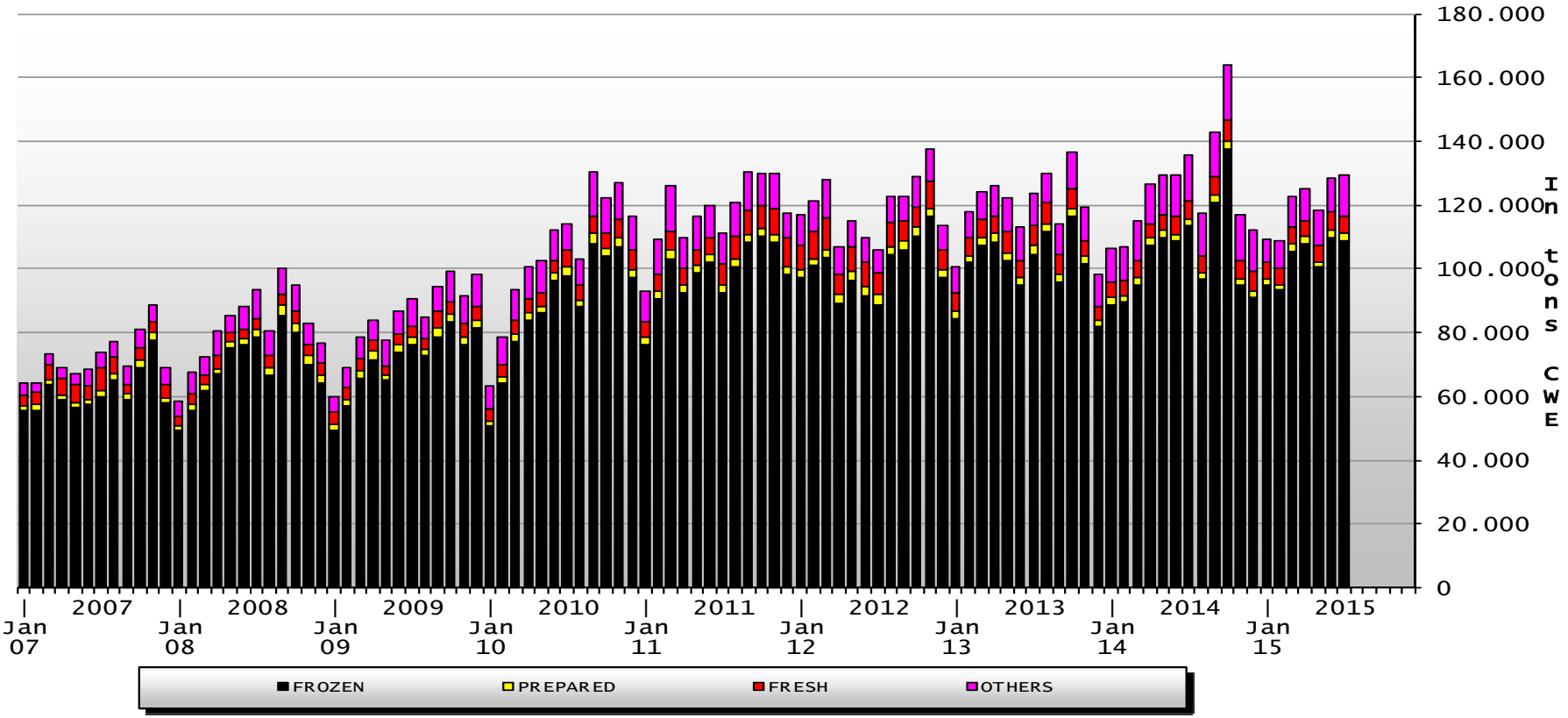
	2011		2012		2013		2014		Jan-Jul 15		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jul 14
South Africa	94.083	6,7%	131.832	9,2%	158.510	11,1%	203.414	13,5%	113.932	13,5%	+ 5%
Benin	126.213	8,9%	139.817	9,8%	139.247	9,8%	163.793	10,9%	99.218	11,8%	+ 7%
Saudi Arabia	151.520	10,7%	149.310	10,4%	154.775	10,9%	123.559	8,2%	80.384	9,5%	+ 5%
Philippines	30.341	2,1%	30.764	2,2%	35.674	2,5%	57.621	3,8%	55.510	6,6%	+ 86%
Hong Kong	189.151	13,4%	126.072	8,8%	117.152	8,2%	136.088	9,0%	50.052	5,9%	- 34%
Ukraine	81.687	5,8%	103.427	7,2%	75.966	5,3%	80.208	5,3%	41.365	4,9%	+ 20%
Ghana	68.978	4,9%	69.156	4,8%	75.216	5,3%	56.883	3,8%	40.522	4,8%	+ 39%
Congo (Dem. Rep.)	29.972	2,1%	34.231	2,4%	28.625	2,0%	33.723	2,2%	22.278	2,6%	+ 18%
Gabon	25.601	1,8%	26.298	1,8%	25.070	1,8%	29.409	2,0%	20.739	2,5%	+ 27%
For.JRep.Mac	24.790	1,8%	32.747	2,3%	36.530	2,6%	33.552	2,2%	19.216	2,3%	- 3%
Russia	115.136	8,1%	113.134	7,9%	95.179	6,7%	68.325	4,5%	576	0,1%	- 99%
Other Destinations	476.174	33,7%	473.766	33,1%	484.421	34,0%	517.311	34,4%	298.950	35,5%	
Extra-EU 28	1.413.647		1.430.554		1.426.365		1.503.885		842.742		
% change			+ 1%		- 0%		+ 5%		- 0,8%		

EU Poultry meat Export

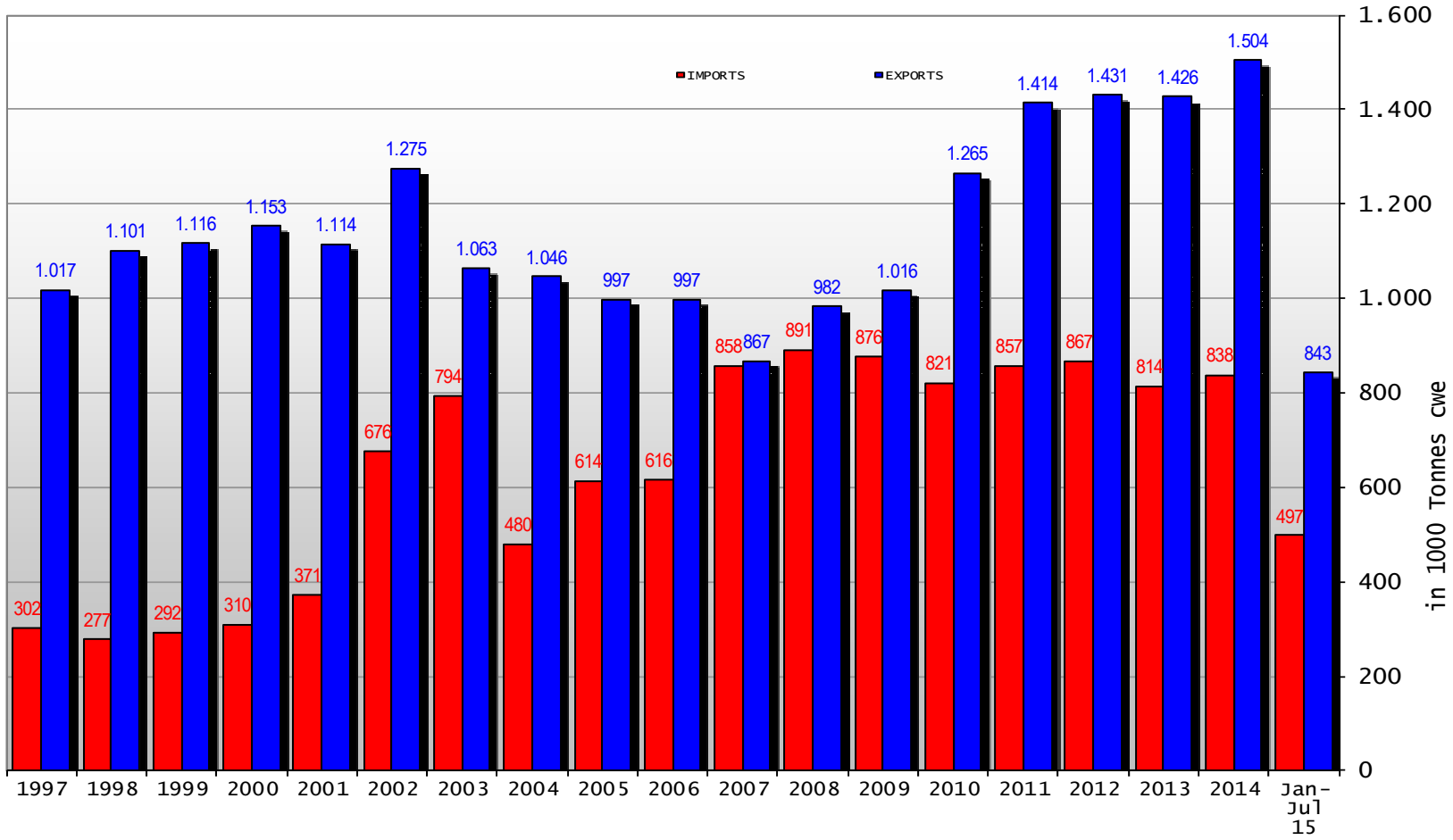


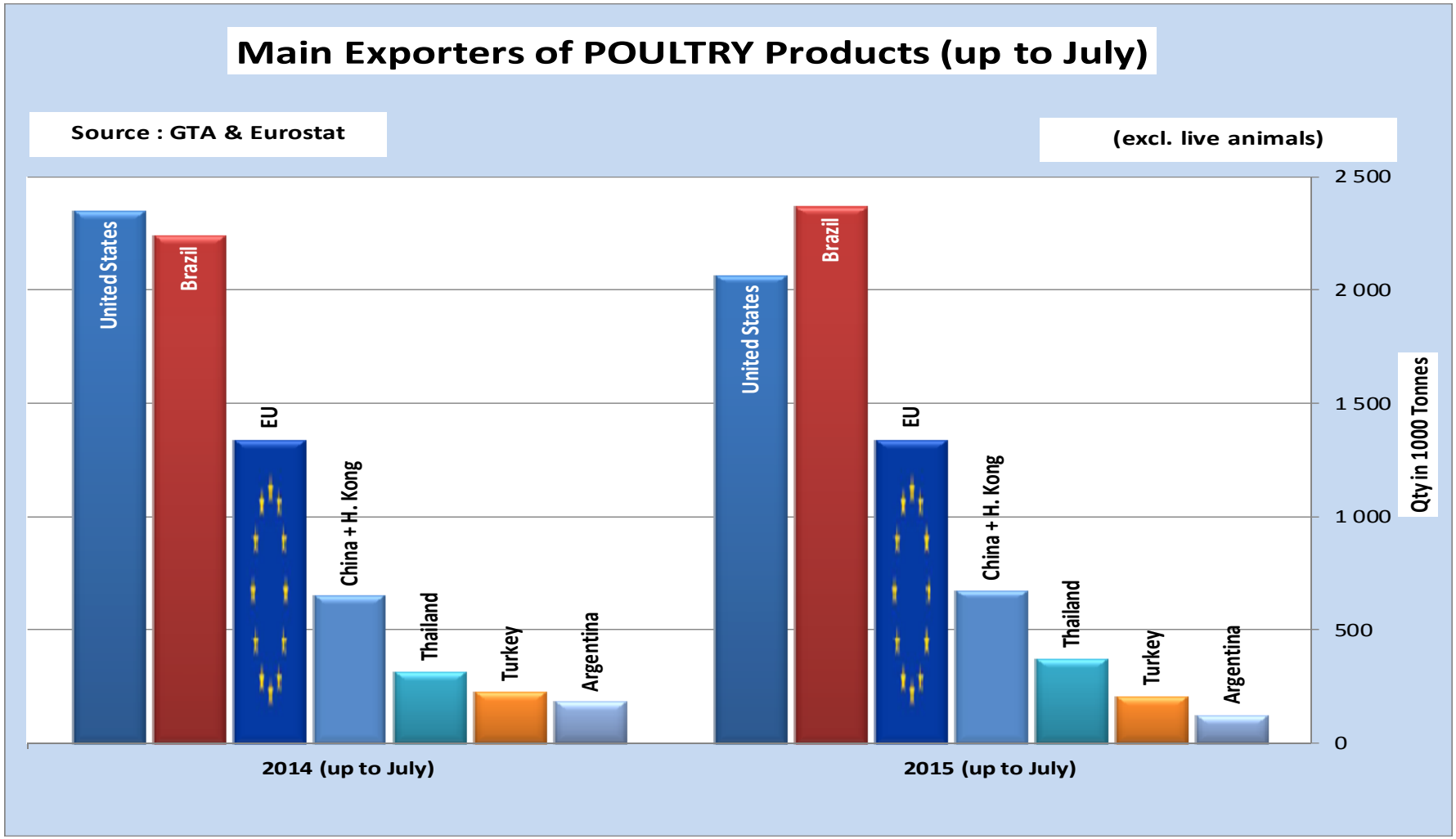


Exports of selected Poultry products



EU Poultry meat Trade Balance




Main Exporters of POULTRY Products (up to July)
Source : GTA & Eurostat
(excl. live animals)
United States
Brazil
EU
China + H. Kong
Thailand
Turkey
Argentina
2014 (up to July)
2015 (up to July)
2 500
2 000
1 500
1 000
500
0
Qty in 1000 Tonnes

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**