

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

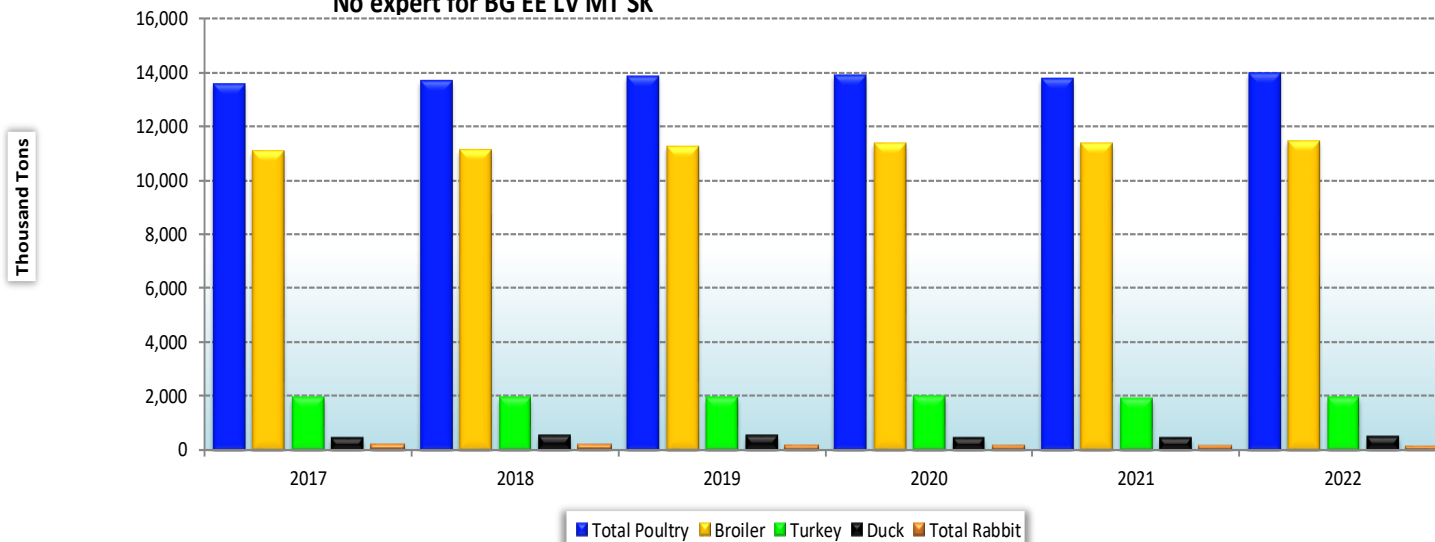
25 November 2021

FORECAST

Experts EU27 production forecast on Poultry and Rabbit

Missing or incomplete data for EL LT NL SI SE

No expert for BG EE LV MT SK



	2017	2018	2019	2020	2021	2022	% 2021/ 2020	% 2022/ 2021
Total Poultry	13,577	13,718	13,860	13,906	13,809	13,979	- 0.7%	+ 1.2%
Broiler	11,106	11,172	11,289	11,398	11,383	11,465	- 0.1%	+ 0.7%
Turkey	1,937	1,921	1,946	1,969	1,896	1,937	- 3.7%	+ 2.2%
Duck	439	517	518	451	451	488	- 0.2%	+ 8.4%
Total Rabbit	210	191	180	160	150	147	- 6.4%	- 2.2%

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



FORECAST

EU production of poultry (expert forecast Autumn 2021)

Source : Experts WG

Qty in Tonnes

% change

	2020	2021	2022	%2021/2020		%2022/2021	
PL	2,744,030	2,687,770	2,736,400		-2.1		1.8
DE	1,801,800	1,782,500	1,796,500		-1.1		0.8
FR	1,733,100	1,683,700	1,726,300		-2.9		2.5
ES	1,419,500	1,374,300	1,389,400		-3.2		1.1
IT	1,390,000	1,387,500	1,390,500		-0.2		0.2
NL	1,119,000	1,119,000	1,119,000		0.0		0.0
HU	666,110	707,540	734,000		6.2		3.7
RO	415,000	435,000	440,000		4.8		1.1
BE	448,100	449,200	449,200		0.2		0.0
PT	349,350	351,300	353,500		0.6		0.6
IE	246,000	238,500	239,500		-3.0		0.4
SE	172,000	177,100	177,100		3.0		0.0
CZ	199,500	197,500	199,500		-1.0		1.0
EL	192,000	192,000	192,000		0.0		0.0
DK	165,400	165,300	164,300		-0.1		-0.6
FI	141,600	148,500	153,500		4.9		3.4
AT	143,797	151,380	154,500		5.3		2.1
LT	140,000	140,000	140,000		0.0		0.0
BG	102,000	102,000	102,000		0.0		0.0
SK	86,000	86,000	86,000		0.0		0.0
HR	88,500	89,500	92,500		1.1		3.4
SI	74,740	74,740	74,740		0.0		0.0
CY	26,680	26,650	26,700		-0.1		0.2
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	13,906,207	13,808,980	13,979,140		-0.7		1.2

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FORECAST

EU production of broiler (expert forecast Autumn 2021)

Source : Experts WG

Qty in Tonnes

% change

	2020	2021	2022	%2021/2020	%2022/2021
PL	2,243,000	2,197,500	2,240,000	-2.0	1.9
DE	1,378,900	1,395,000	1,399,000	1.2	0.3
ES	1,180,000	1,140,000	1,150,000	-3.4	0.9
FR	1,179,400	1,185,300	1,193,600	0.5	0.7
NL	1,100,000	1,100,000	1,100,000	0.0	0.0
IT	1,068,000	1,075,000	1,076,000	0.7	0.1
HU	461,980	476,010	485,000	3.0	1.9
RO	400,000	420,000	420,000	5.0	0.0
BE	440,900	442,000	442,000	0.2	0.0
PT	292,500	293,000	294,000	0.2	0.3
SE	167,100	172,100	172,100	3.0	0.0
IE	210,000	200,000	200,000	-4.8	0.0
EL	185,000	185,000	185,000	0.0	0.0
CZ	177,000	177,000	177,000	0.0	0.0
DK	164,100	164,000	163,000	-0.1	-0.6
FI	135,300	140,000	145,000	3.5	3.6
LT	130,000	130,000	130,000	0.0	0.0
AT	124,998	130,000	131,000	4.0	0.8
SK	80,100	80,100	80,100	0.0	0.0
BG	75,000	75,000	75,000	0.0	0.0
HR	71,000	72,000	74,000	1.4	2.8
SI	69,000	69,000	69,000	0.0	0.0
CY	26,530	26,500	26,500	-0.1	0.0
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	11,397,988	11,382,690	11,465,480	-0.1	0.7

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FORECAST

EU production of turkey (expert forecast Autumn 2021)

Source : Experts WG

Qty in Tonnes

% change

	2020	2021	2022		%2021/2020	%2022/2021
PL	400,000	398,400	402,000		-0.4	0.9
DE	392,300	360,000	370,000		-8.2	2.8
FR	328,500	306,500	312,600		-6.7	2.0
IT	313,000	303,000	305,000		-3.2	0.7
ES	235,000	230,000	235,000		-2.1	2.2
HU	100,420	90,350	95,000		-10.0	5.1
PT	47,200	48,500	49,500		2.8	2.1
IE	31,000	33,000	34,000		6.5	3.0
NL	28,000	28,000	28,000		0.0	0.0
AT	17,604	20,000	22,000		13.6	10.0
RO	15,000	15,000	20,000		0.0	33.3
HR	17,000	17,000	18,000		0.0	5.9
CZ	10,000	10,000	10,000		0.0	0.0
FI	6,300	8,500	8,500		34.9	0.0
BE	7,200	7,200	7,200		0.0	0.0
SI	5,740	5,740	5,740		0.0	0.0
LT	5,500	5,500	5,500		0.0	0.0
SE	4,900	5,000	5,000		2.0	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	150	150	200		0.0	33.3
BG	100	100	100		0.0	0.0
LV						
EE						
MT						
EU27	1,968,914	1,895,940	1,937,340		-3.7	2.2

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FORECAST

EU production of duck (expert forecast Autumn 2021)

Source : Experts WG

Qty in Tonnes

% change

	2020	2021	2022	%2021/2020		%2022/2021	
FR	193,500	166,000	190,900		-14.2		15.0
HU	82,470	116,230	125,000		40.9		7.5
PL	70,120	67,230	69,000		-4.1		2.6
DE	25,900	23,000	23,000		-11.2		0.0
BG	22,000	22,000	22,000		0.0		0.0
NL	19,000	19,000	19,000		0.0		0.0
CZ	12,000	10,000	12,000		-16.7		20.0
PT	9,650	9,800	10,000		1.6		2.0
IE	5,000	5,500	5,500		10.0		0.0
IT	4,000	4,200	4,200		5.0		0.0
ES	4,500	4,300	4,400		-4.4		2.3
DK	1,300	1,300	1,300		0.0		0.0
SK	600	600	600		0.0		0.0
HR	500	500	500		0.0		0.0
AT	662	800	900		20.8		12.5
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	451,307	450,565	488,405		-0.2		8.4

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FORECAST

EU production of rabbit (expert forecast Autumn 2021)

Source : Experts WG

Qty in Tonnes

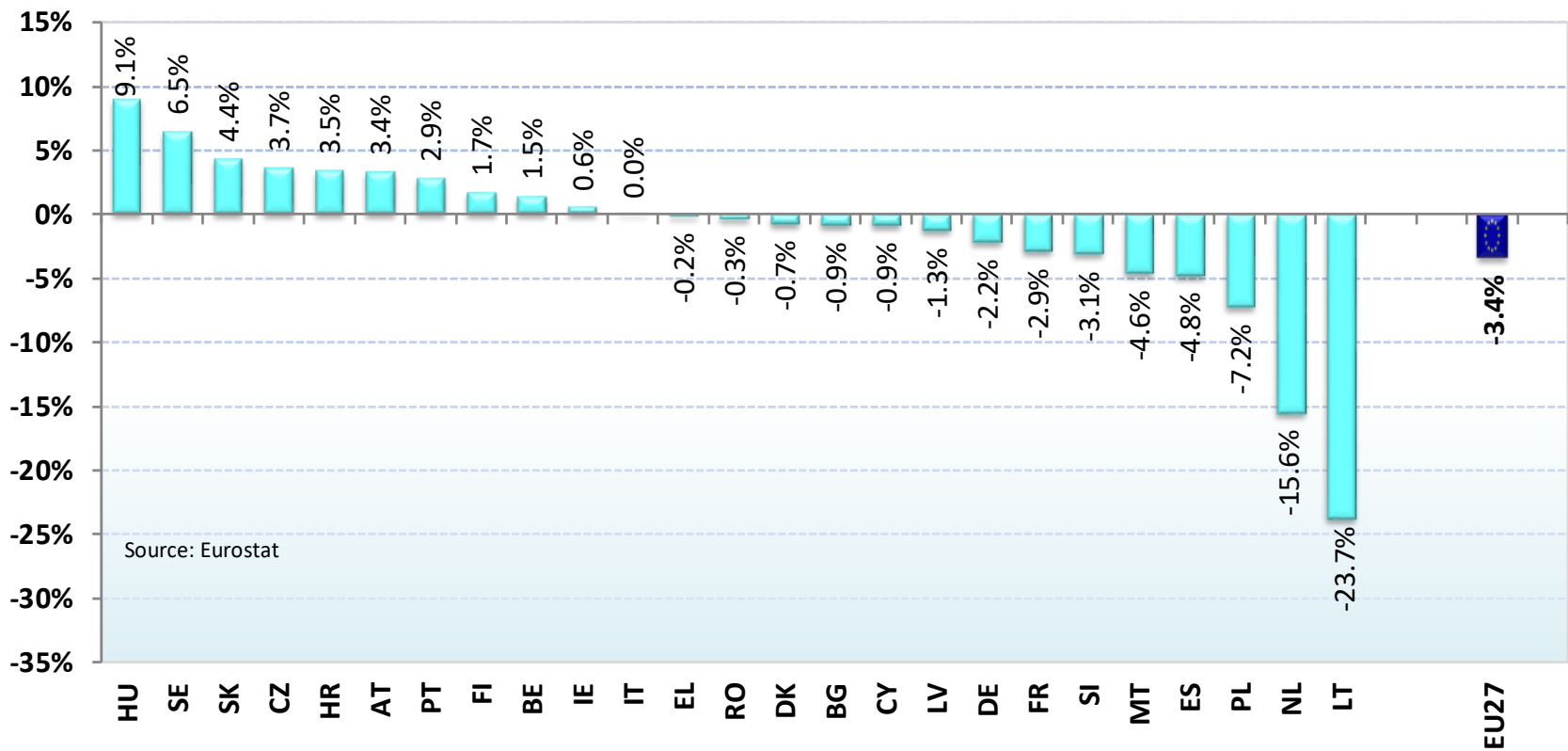
% change

	2020	2021	2022	%2021/2020	%2022/2021
ES	51,000	50,000	50,000	-2.0	0.0
FR	39,100	36,900	35,100	-5.6	-4.9
IT	30,000	28,000	27,000	-6.7	-3.6
PL	16,000	11,000	10,500	-31.3	-4.5
CZ	9,100	9,000	9,000	-1.1	0.0
PT	5,700	5,700	5,700	0.0	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	410	400	400	-2.4	0.0
BE	250	250	240	0.0	-4.0
LT	2	2	2	0.0	0.0
MT					
AT	0	0	0		
DK	0	0	0		
IE	0	0	0		
NL					
BG					
DE					
HU					
SE					
RO					
FI					
HR					
LV					
EE					
SI					
EU27	160,162	149,852	146,542	-6.4	-2.2

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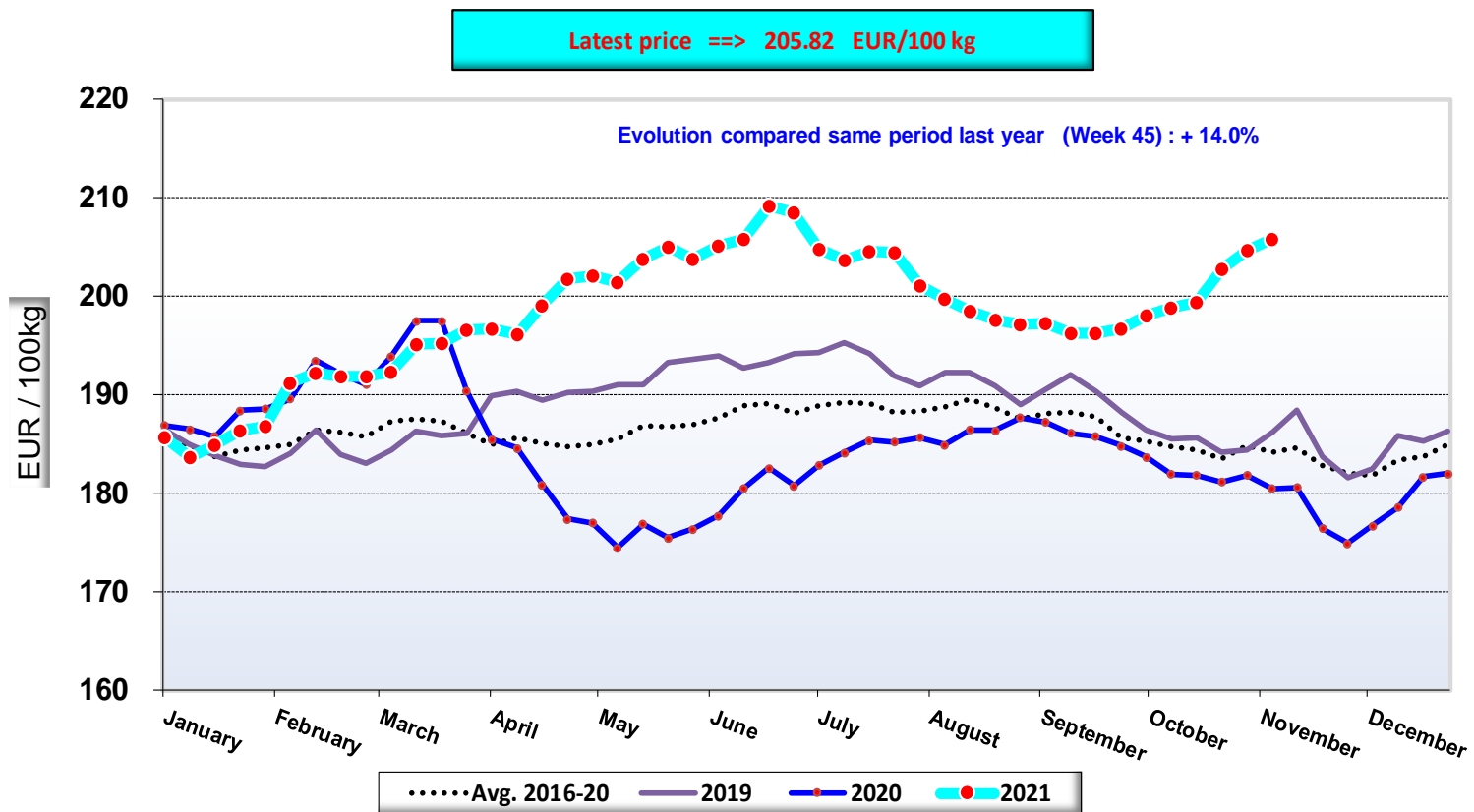
PRODUCTION

Change in Poultry Meat Production in %
2021/2020 (up to August)



25 November 2021

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



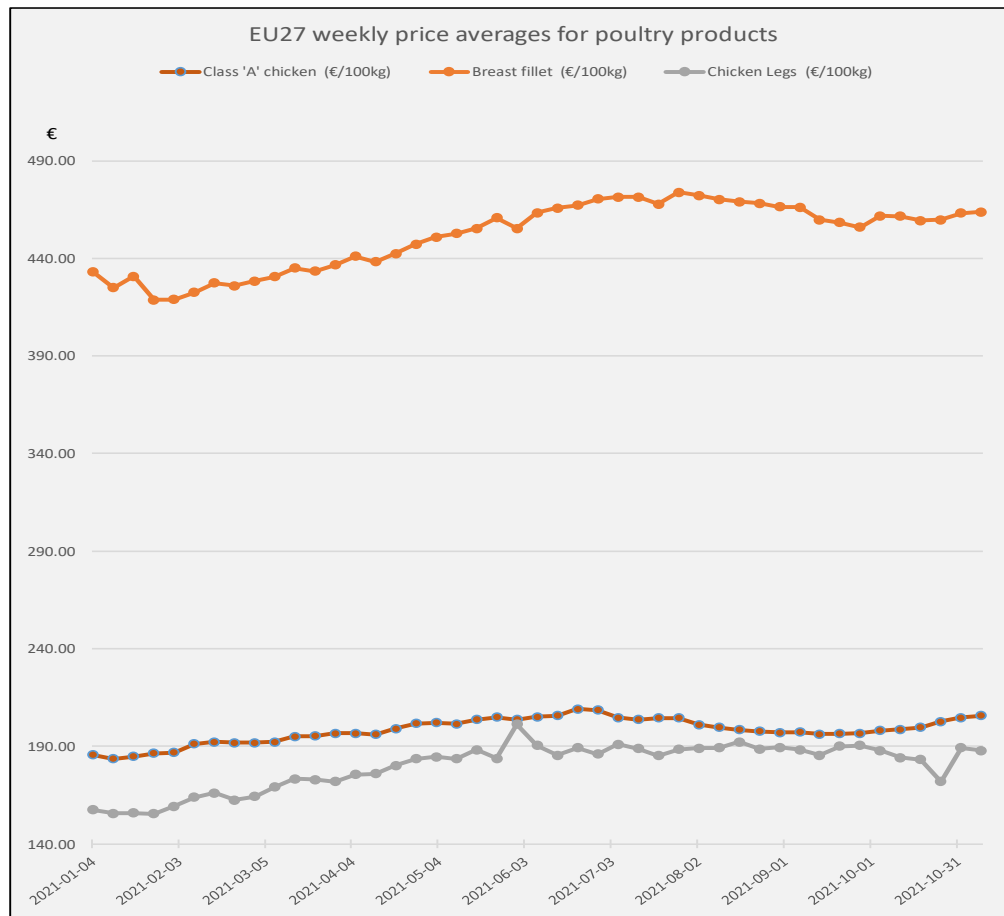
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

* EU without UK

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Weekly prices of poultry products

Week - 45 EU27 weekly price averages for poultry products



Week start	Week nr.	Class 'A' chicken	Breast fillet	Chicken Legs
04/01/2021	1	185.72	433.05	157.55
11/01/2021	2	183.72	425.01	155.70
18/01/2021	3	184.87	430.79	155.94
25/01/2021	4	186.39	418.74	155.49
01/02/2021	5	186.85	419.02	159.21
08/02/2021	6	191.20	422.57	163.89
15/02/2021	7	192.19	427.45	166.08
22/02/2021	8	191.90	426.05	162.58
01/03/2021	9	191.88	428.46	164.31
08/03/2021	10	192.38	430.63	169.15
15/03/2021	11	195.10	434.98	173.43
22/03/2021	12	195.29	433.34	173.02
29/03/2021	13	196.63	436.72	171.92
05/04/2021	14	196.70	441.12	175.52
12/04/2021	15	196.13	438.19	175.97
19/04/2021	16	199.04	442.54	180.27
26/04/2021	17	201.73	447.36	183.64
03/05/2021	18	202.13	450.86	184.63
10/05/2021	19	201.48	452.72	183.54
17/05/2021	20	203.84	455.23	188.19
24/05/2021	21	205.04	460.85	183.91
31/05/2021	22	203.83	455.41	201.38
07/06/2021	23	205.12	463.31	190.43
14/06/2021	24	205.78	465.76	185.48
21/06/2021	25	209.15	467.15	189.36
28/06/2021	26	208.55	470.32	186.15
05/07/2021	27	204.83	471.33	191.07
12/07/2021	28	203.70	471.38	188.92
19/07/2021	29	204.54	467.82	185.15
26/07/2021	30	204.49	473.87	188.57
02/08/2021	31	201.07	472.15	189.11
09/08/2021	32	199.70	470.23	189.33
16/08/2021	33	198.54	468.95	192.39
23/08/2021	34	197.62	468.11	188.60
30/08/2021	35	197.12	466.32	189.54
06/09/2021	36	197.23	466.24	188.21
13/09/2021	37	196.22	459.67	185.38
20/09/2021	38	196.60	458.26	190.01
27/09/2021	39	196.68	455.91	190.56
04/10/2021	40	198.08	461.78	187.76
11/10/2021	41	198.64	461.64	184.24
18/10/2021	42	199.66	459.33	183.22
25/10/2021	43	202.83	459.67	171.96
01/11/2021	44	204.69	463.22	189.37
08/11/2021	45	205.86	463.82	187.83

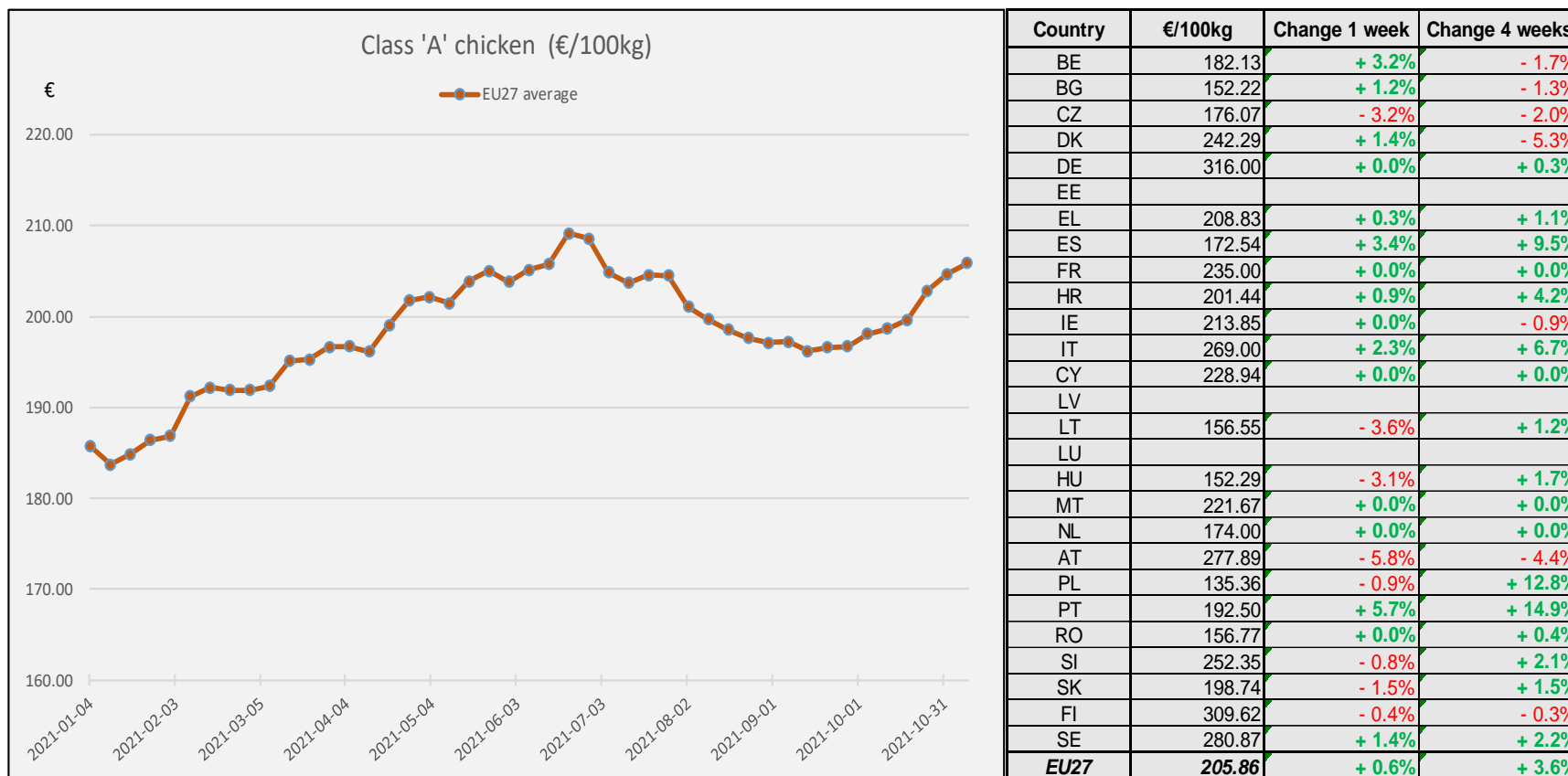
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

! Prices reported by MS are preliminary and may be subject to change !

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Weekly price of 'Class A Chicken'

Week - 45 Class 'A' chicken



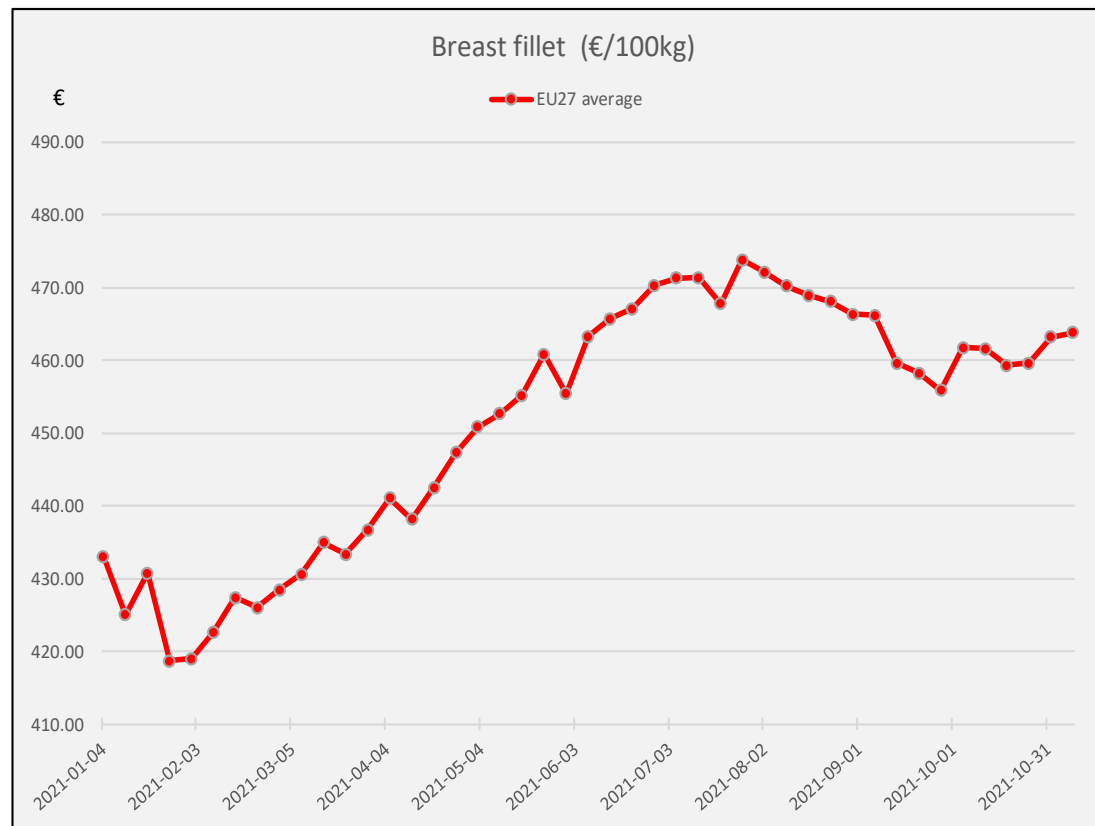
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

! Prices reported by MS are preliminary and may be subject to change !

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Weekly price of 'Breast fillet'

Week - 45 Breast fillet



Country	€/100kg	Change 1 week	Change 4 weeks
BE	347.55	+ 2.0%	+ 0.1%
BG	332.33	- 0.5%	- 2.2%
CZ	416.84	- 0.8%	+ 0.1%
DK			
DE	608.00	- 0.3%	+ 0.2%
EE			
EL	301.21	- 0.4%	- 0.0%
ES			
FR	580.00	+ 0.0%	+ 0.0%
HR	531.66	+ 4.8%	+ 6.7%
IE			
IT	567.00	+ 0.5%	+ 1.3%
CY			
LV			
LT	348.00	+ 0.2%	+ 0.3%
LU			
HU	343.33	- 3.1%	+ 0.9%
MT	421.67	+ 0.0%	+ 0.0%
NL			
AT	745.92	+ 0.4%	- 1.4%
PL	320.37	+ 1.5%	+ 2.1%
PT	392.50	+ 0.0%	+ 0.0%
RO	299.42	+ 2.6%	- 2.5%
SI	439.61	- 2.8%	- 9.5%
SK	401.97	- 0.0%	+ 6.6%
FI	600.00	- 1.6%	- 1.6%
SE	778.65	- 5.0%	- 0.8%
EU27	463.82	+ 0.1%	+ 0.5%

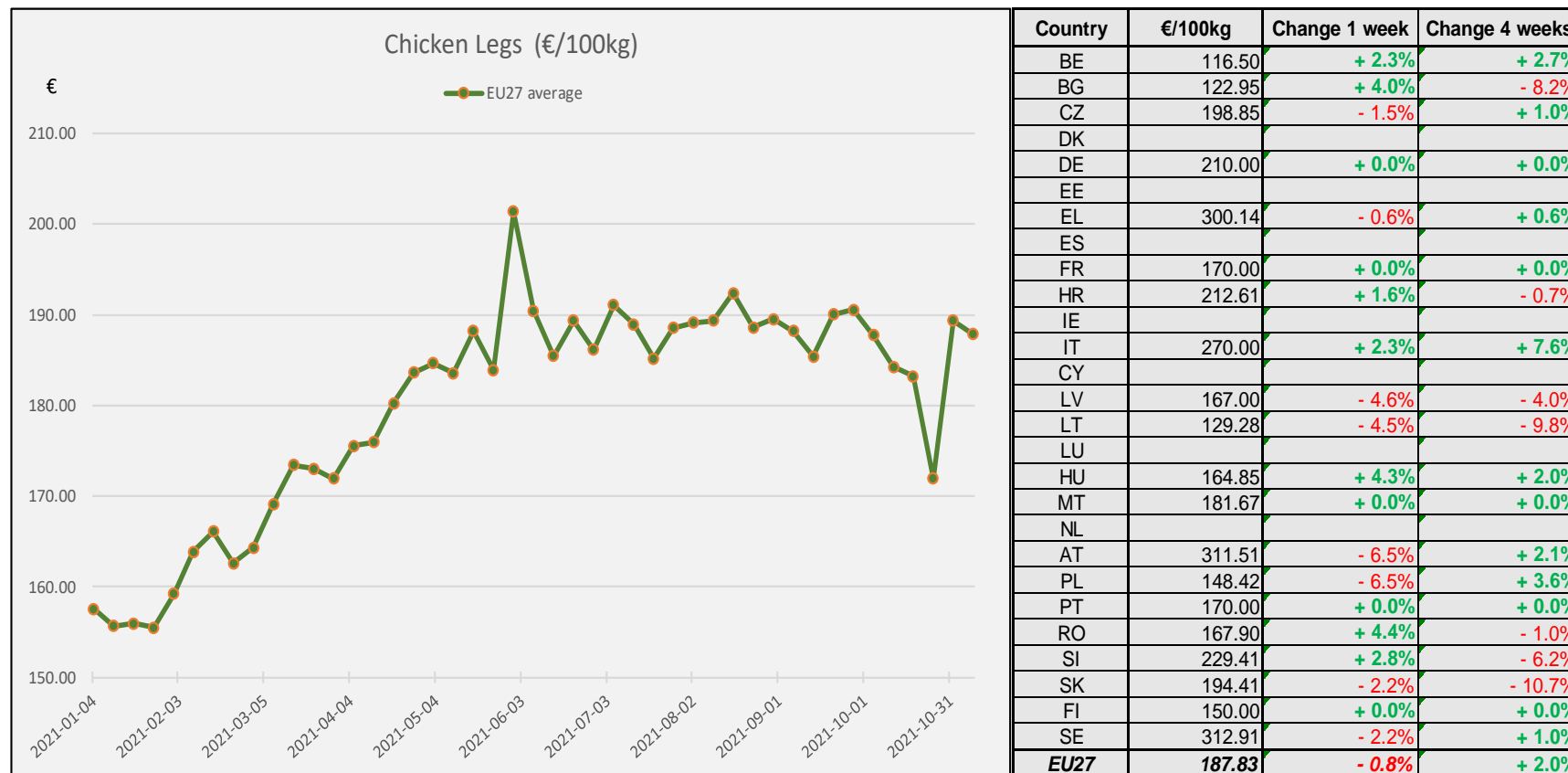
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

! Prices reported by MS are preliminary and may be subject to change !

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Weekly price of 'Chicken legs'

Week - 45 Chicken Legs

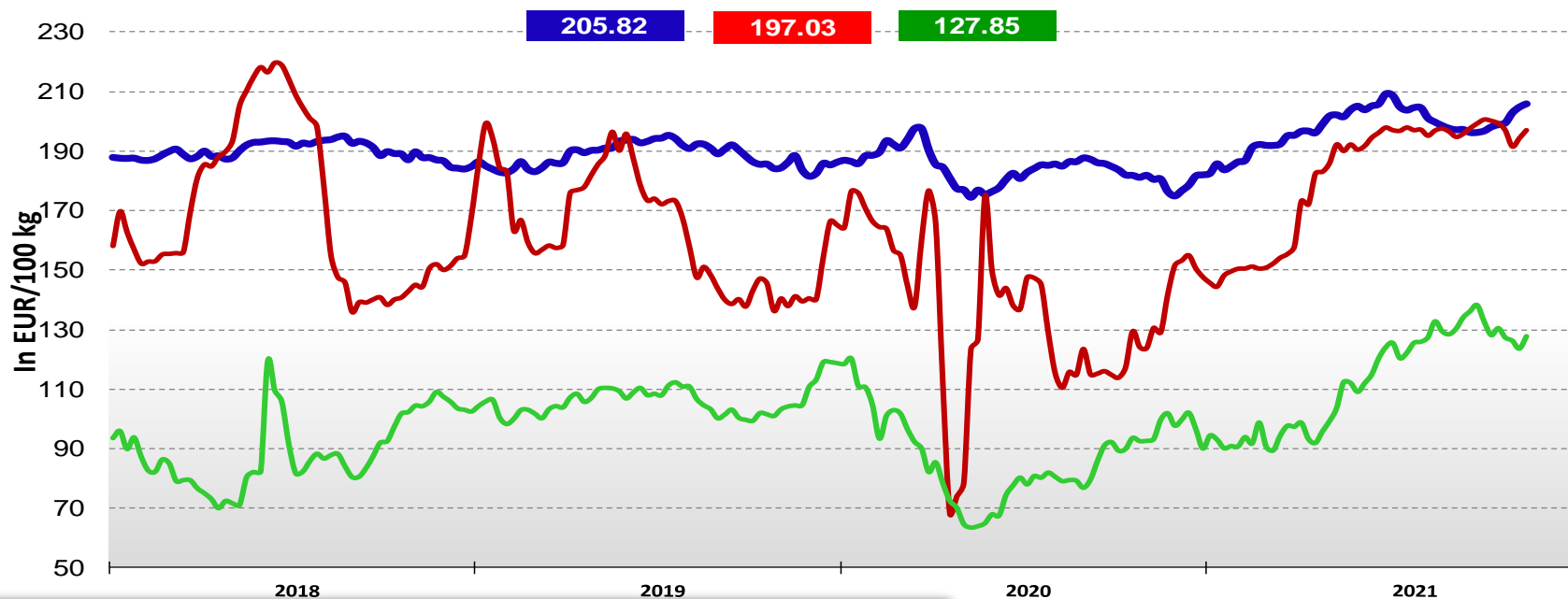


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

! Prices reported by MS are preliminary and may be subject to change !

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Broiler prices in EU, USA and Brazil

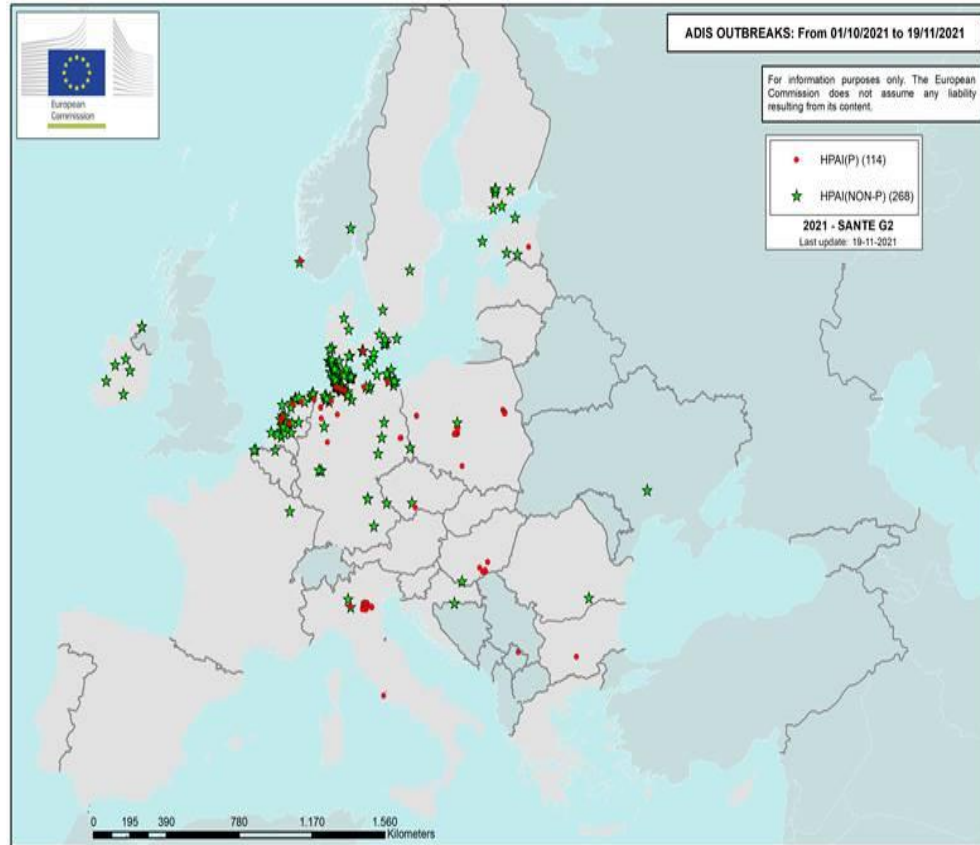


Sources : EU = weighted average of country prices - Broiler 65%
 US = weekly USDA prices - Fresh chicken grade A ,Chicago
 BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

EU US BR

AVIAN INFLUENZA

UPDATE



Avian influenza situation updates available at:
https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en

Third countries imposing import restrictions on EU poultry in 2021

Imposing country-wide import bans

- *Japan, South Korea, China, Kuwait,*
- *South Africa,*
- *Cuba,*
- *United Arab Emirates,*
- *Morocco, Kenya, Cameroon, Sudan, Tanzania, Algeria*

Accepting regionalization (either for all MSs or to some MSs – either for all or some products)

- *the Philippines, Singapore,*
- *Saudi Arabia, United Arab Emirates*

EU-27 Exports of poultry meat to selected destinations (including UK)

In Tons of Carcase Weight

	2019		2020		Jan to Aug 2021		Compared to Jan to Aug 2020
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	898,770	33%	810,644	32%	441,238	31%	-15%
Ghana	184,033	7%	213,896	8%	161,418	11%	+20%
Ukraine	178,233	7%	145,871	6%	105,369	7%	+16%
Congo (Dem. Rep.)	78,445	3%	101,987	4%	73,518	5%	+7%
Philippines	215,640	8%	195,884	8%	58,170	4%	-59%
Benin	68,909	3%	61,472	2%	44,161	3%	+22%
Saudi Arabia	67,180	2%	74,407	3%	40,450	3%	-13%
South Africa	129,827	5%	89,112	4%	27,978	2%	-54%
Gabon	33,432	1%	38,164	2%	25,678	2%	+16%
Switzerland	31,502	1%	30,592	1%	21,615	2%	+8%
Liberia	22,543	1%	27,930	1%	20,974	1%	+4%
Other Destinations	779,989	29%	729,970	29%	400,416	28%	-17%
Extra-EU	2,688,503		2,519,929		1,420,984		-13.3%
% Change				-6%			

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EU-27 Exports of poultry meat to selected destinations (without UK)

	2017		2018		2019		2020		Jan-Sep 21		Compared to Jan-Sep 20
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Ghana	143,900	9.1%	163,301	9.7%	184,033	10.3%	213,896	12.5%	178,573	15.9%	+ 14.4%
Ukraine	160,818	10.1%	177,036	10.6%	178,233	10.0%	145,871	8.5%	122,300	10.9%	+ 15.3%
Congo (Dem. Rep.)	58,336	3.7%	74,953	4.5%	78,445	4.4%	101,987	6.0%	95,229	8.5%	+ 23.1%
Philippines	125,344	7.9%	159,845	9.5%	215,640	12.0%	195,884	11.5%	65,174	5.8%	- 60.1%
Benin	103,562	6.5%	90,594	5.4%	68,909	3.9%	61,472	3.6%	48,862	4.3%	+ 14.1%
Saudi Arabia	98,715	6.2%	82,482	4.9%	67,180	3.8%	74,407	4.4%	44,814	4.0%	- 12.9%
South Africa	76,314	4.8%	84,004	5.0%	129,827	7.3%	89,112	5.2%	32,642	2.9%	- 53.6%
Gabon	43,471	2.7%	39,224	2.3%	33,432	1.9%	38,164	2.2%	29,007	2.6%	+ 12.4%
Liberia	36,955	2.3%	19,819	1.2%	22,543	1.3%	27,930	1.6%	25,160	2.2%	+ 12.1%
Switzerland	31,281	2.0%	33,273	2.0%	31,502	1.8%	30,592	1.8%	24,979	2.2%	+ 9.2%
Other Destinations	706,719	44.6%	753,001	44.9%	779,989	43.6%	729,982	42.7%	459,585	40.8%	
Total (without UK)	1,585,415		1,677,532		1,789,733		1,709,298		1,126,324		
% change			+ 6%		+ 7%		- 4%		- 12.4%		

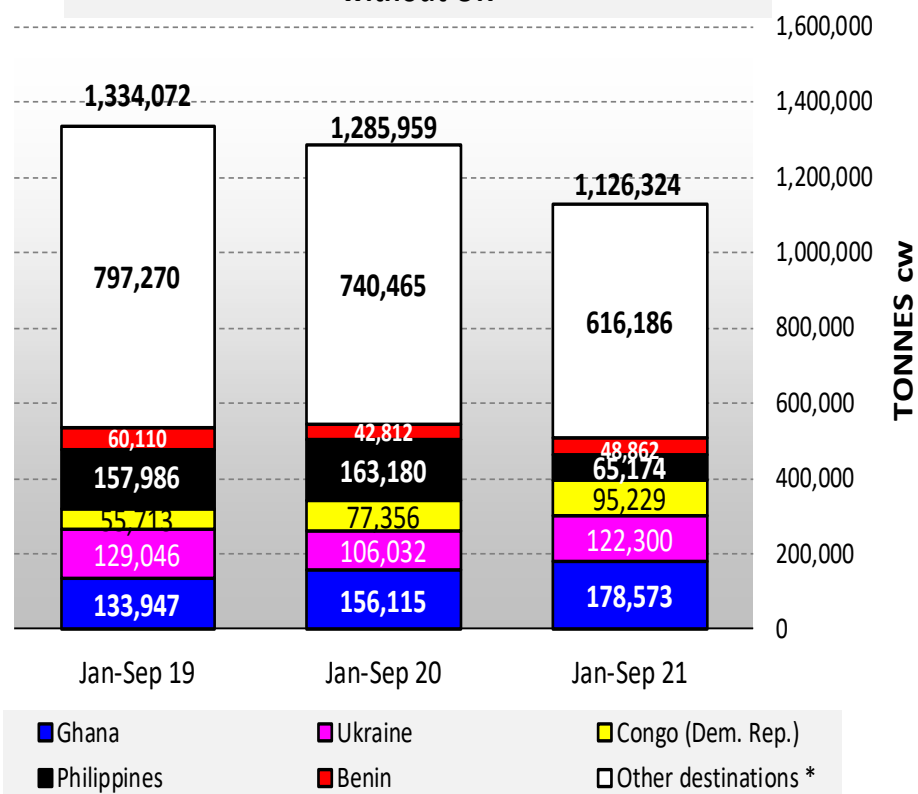
EU Poultry Trade with UK from Jan to Aug

In Tons of Carcase Weight

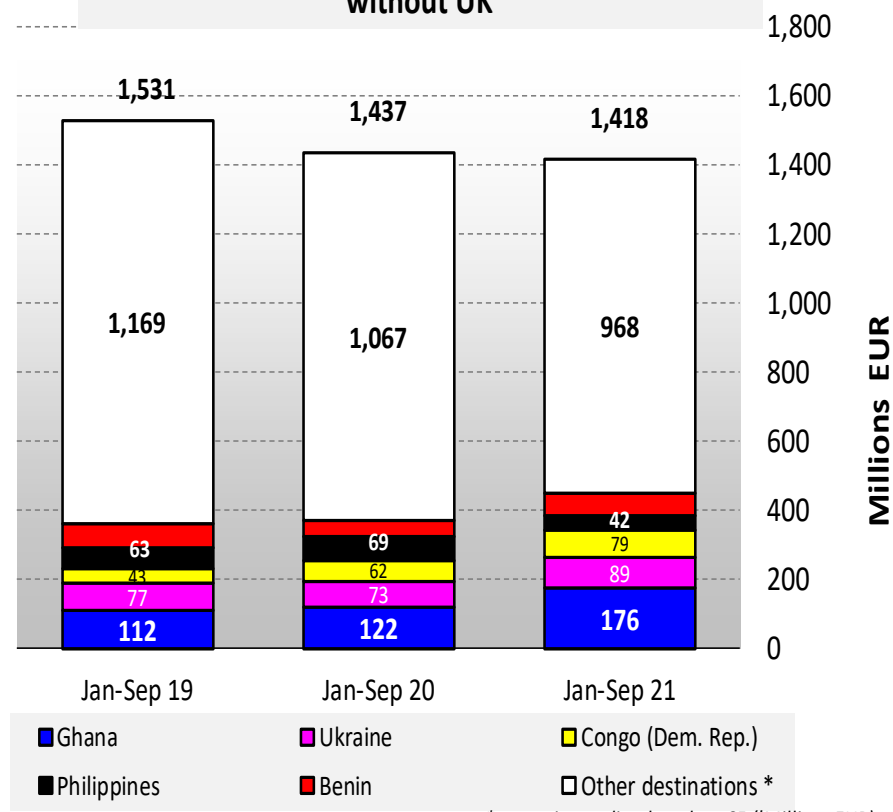
	2019	2020	2021	2021/2020
Exports	597,021	517,282	441,238	-15%
Live Animals	1,086	187	4,249	2172%
Meats	595,935	517,095	436,989	-15%

EU-27 poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)
without UK

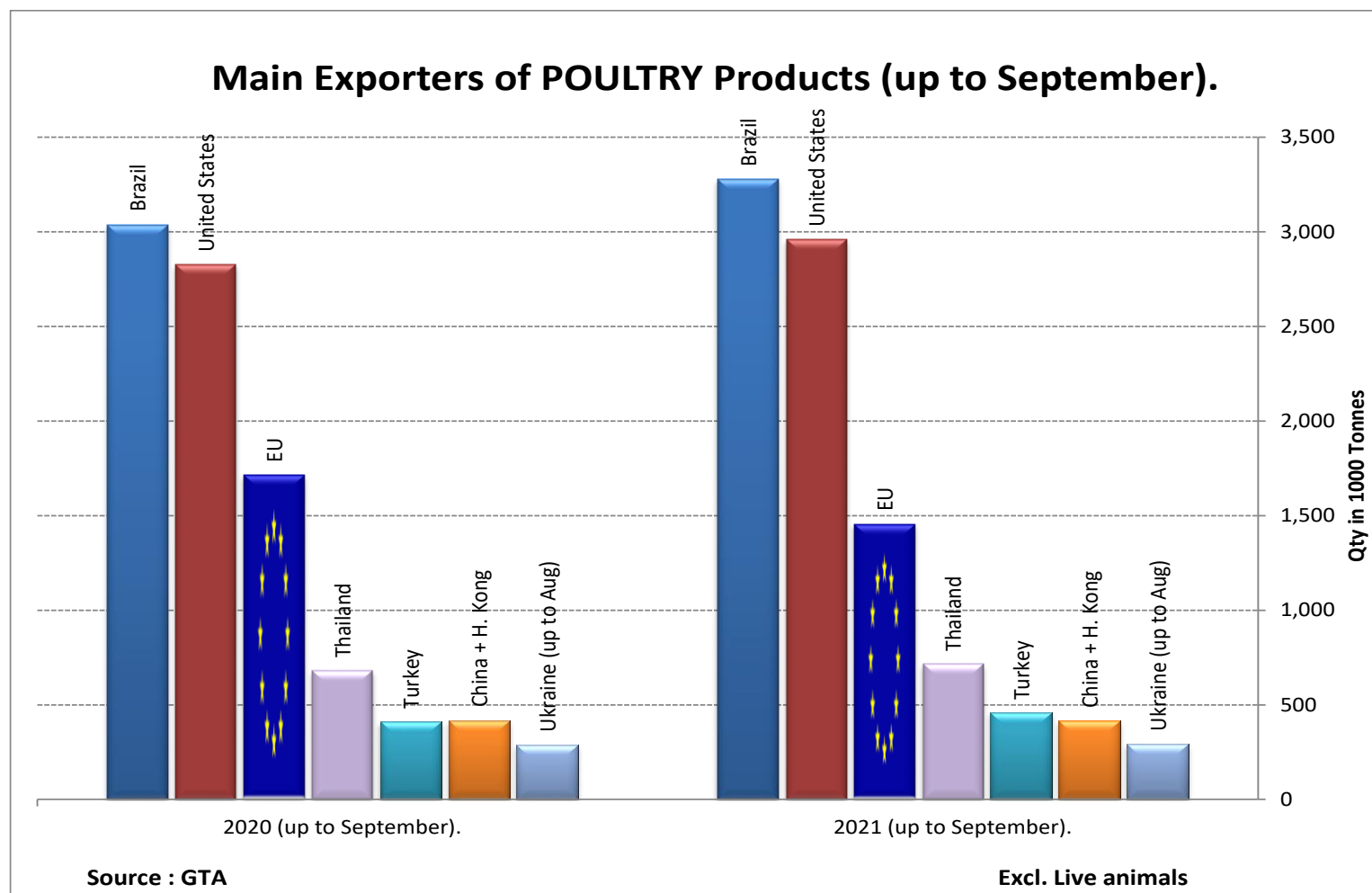


EU EXPORTS of Poultry Meat (Millions EUR)
without UK



* countries trading less than 65 ('Millions EUR)

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EU-27 Imports of poultry meat from selected origins

(including UK)

In Tons of Carcase Weight

	2019		2020		Jan to Aug 2021		Compared to Jan to Aug 2020
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	338,811	36%	293,847	37%	177,311	35%	-9%
Brazil	235,521	25%	227,702	28%	152,160	30%	+2%
Thailand	172,712	19%	131,374	16%	94,839	19%	-2%
Ukraine	133,819	14%	108,669	14%	61,493	12%	-12%
China	21,878	2%	17,017	2%	12,165	2%	+6%
Chile	19,610	2%	14,382	2%	2,018	0%	-86%
Norway	1,280	0%	1,392	0%	1,779	0%	+76%
Switzerland	2,580	0%	2,327	0%	1,514	0%	-8%
Bosnia-Herz.	47	0%	979	0%	1,300	0%	+++
Argentina	4,071	0%	3,273	0%	1,178	0%	-50%
Tunisia	-	0%	1,444	0%	1,102	0%	+++
Other Destinations	2,860	0%	2,262	0%	1,821	0%	+38%
Extra-EU	933,188		804,669		508,679		-6.2%
% Change				-14%			

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EU-27 Imports of poultry meat from selected origins (without UK)

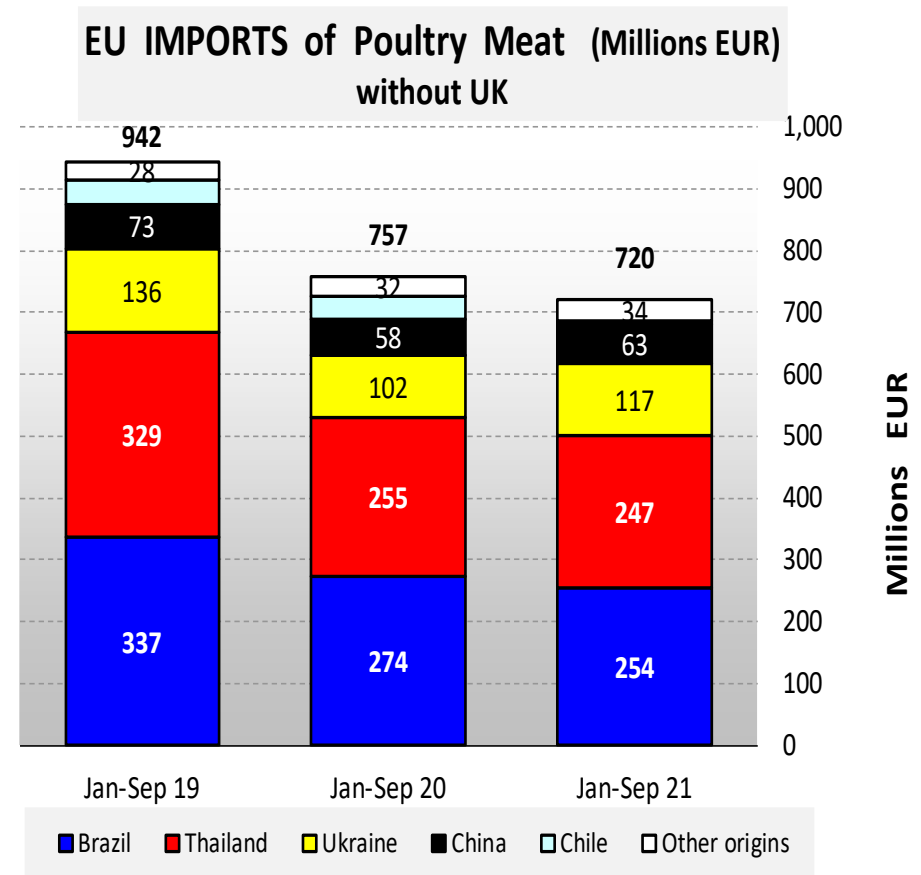
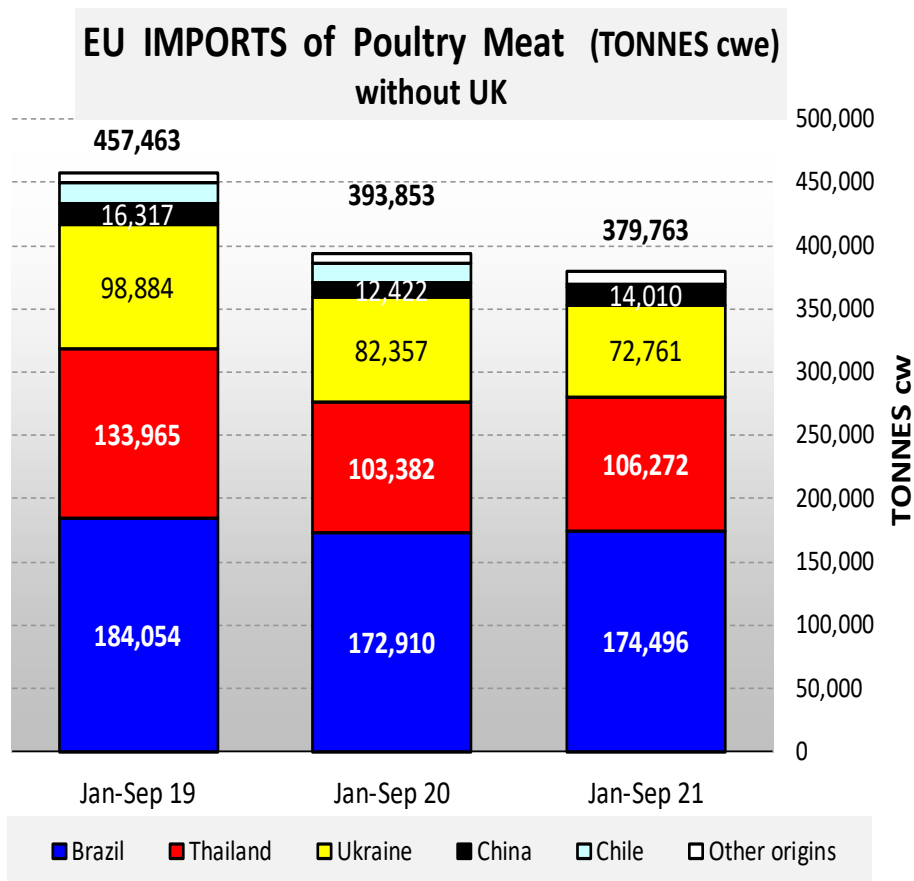
	2017		2018		2019		2020		Jan-Sep 21		Compared to Jan-Sep 20
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	318,420	55.4%	232,211	40.1%	235,521	39.6%	227,702	44.6%	174,496	45.9%	+ 0.9%
Thailand	140,474	24.5%	173,177	29.9%	172,712	29.1%	131,374	25.7%	106,272	28.0%	+ 2.8%
Ukraine	80,128	14.0%	123,412	21.3%	133,819	22.5%	108,669	21.3%	72,761	19.2%	- 11.7%
China	14,674	2.6%	17,060	2.9%	21,878	3.7%	17,017	3.3%	14,010	3.7%	+ 12.8%
Chile	9,165	1.6%	21,156	3.7%	19,610	3.3%	14,382	2.8%	2,202	0.6%	- 84.7%
Norway	889	0.2%	1,026	0.2%	1,280	0.2%	1,392	0.3%	1,957	0.5%	+ 79.2%
Switzerland	2,736	0.5%	2,901	0.5%	2,580	0.4%	2,327	0.5%	1,800	0.5%	- 1.4%
Other Destinations	7,843	1.4%	7,816	1.4%	6,978	1.2%	7,958	1.6%	6,265	1.6%	
Total (without UK)	574,329		578,760		594,377		510,821		379,763		
% change			+ 1%		+ 3%		- 14%		- 3.6%		

EU Poultry Trade with UK from Jan to Aug

In Tons of Carcase Weight

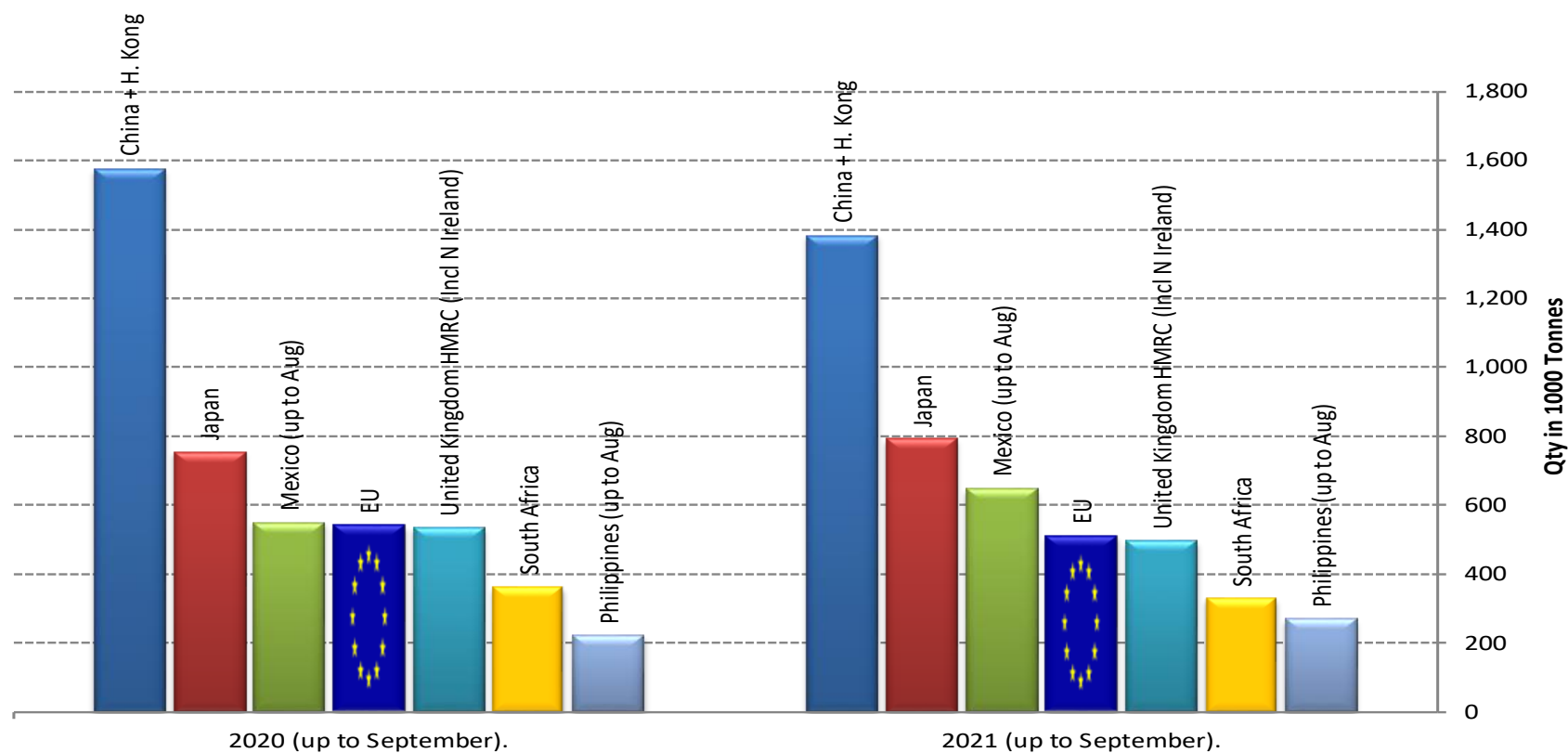
	2019	2020	2021	2021/2020
Imports	225,953	193,804	177,311	-9%
Live Animals	944	1,675	1,553	-7%
Meats	225,009	192,129	175,758	-9%

EU27 poultry meat imports (by origin)



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Main Importers of POULTRY Products (up to September).



Source : GTA

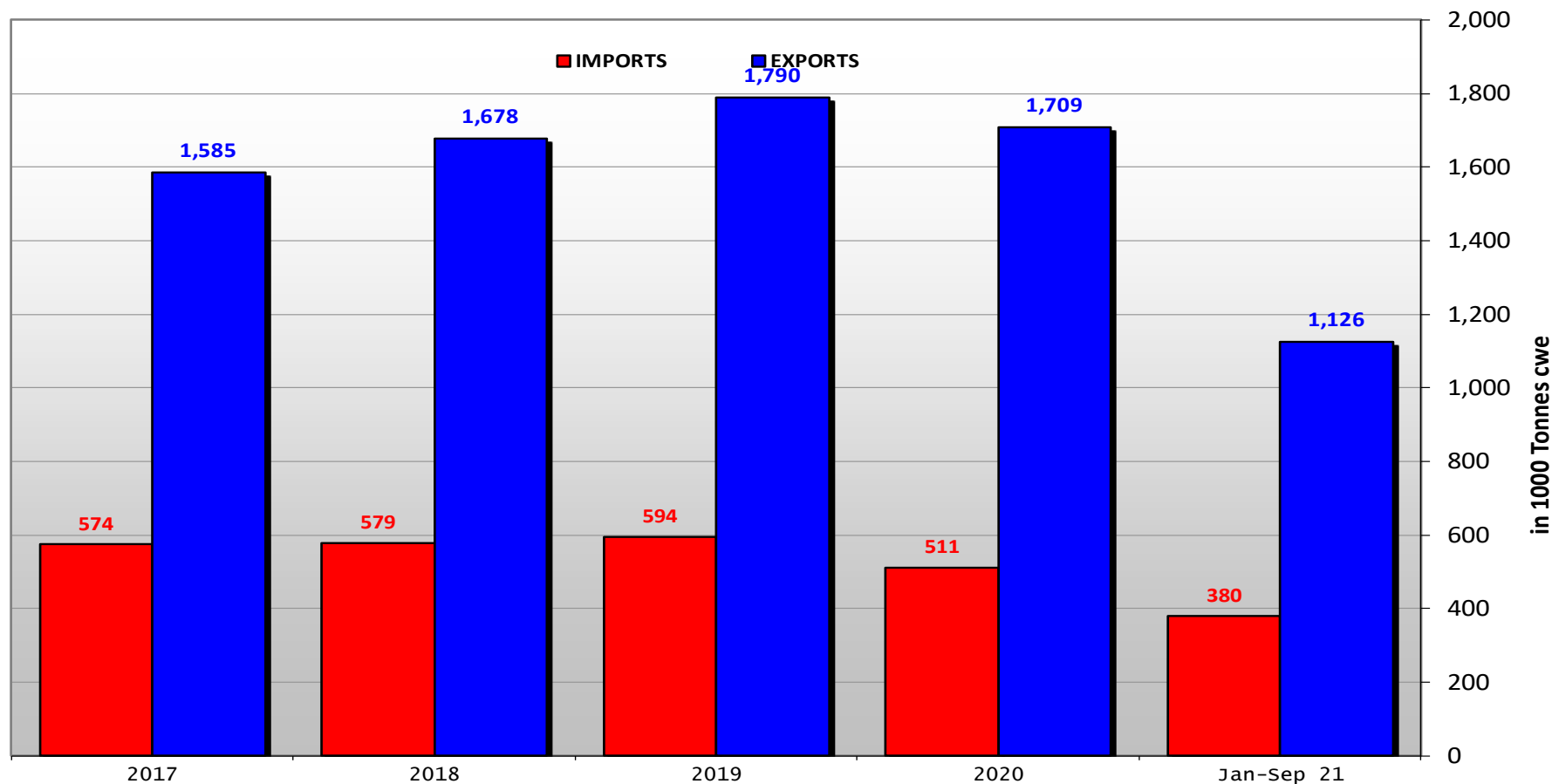
Excl. Live animals

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TRADE

BALANCE

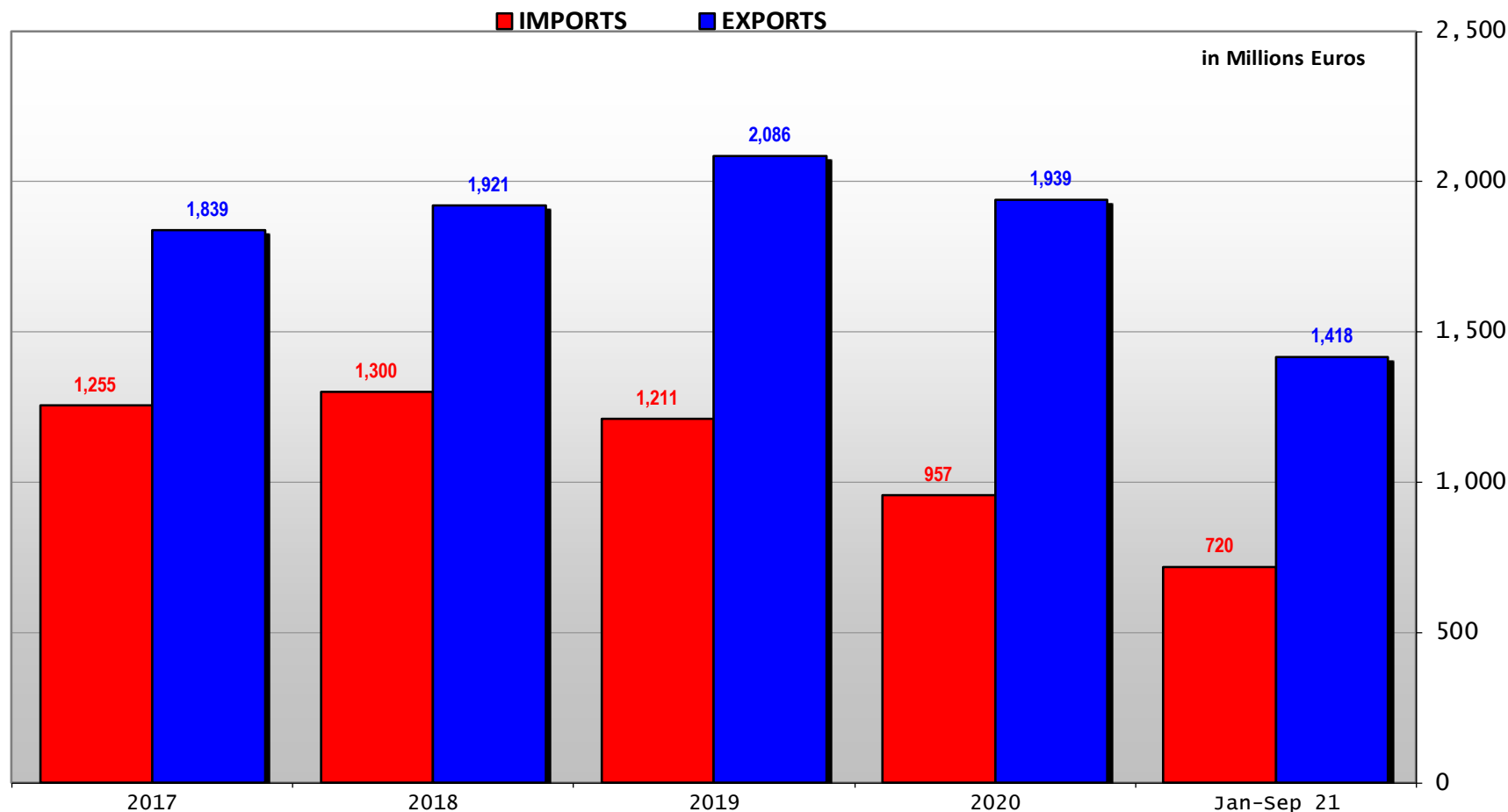
EU poultry meat trade balance* (in 1000 tonnes cwe)



* Without UK trade

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EU poultry meat trade balance* (in million euros)



* Without UK trade

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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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