

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

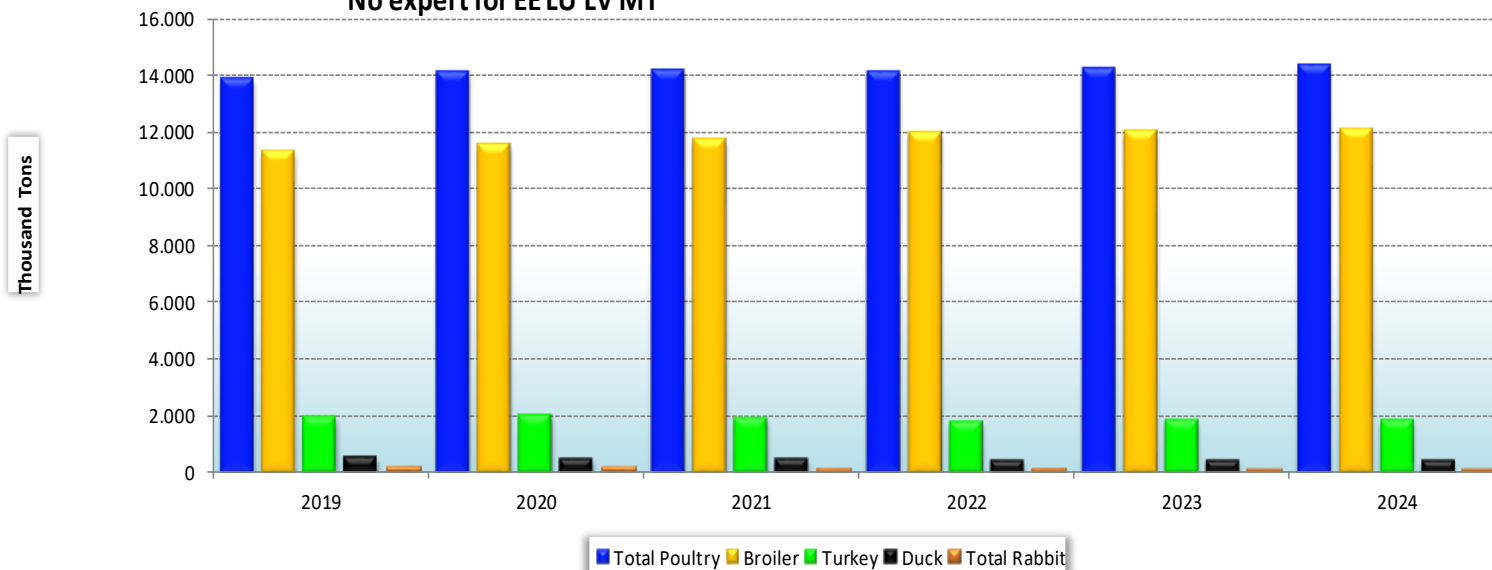
10 October 2023

FORECAST

Experts EU27 production forecast on Poultry and Rabbit

Missing or incomplete data for BE BG CZ EE EL ES HR LV LT MT NL PL PT 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	14.065	14.232	14.321	+ 1,2%	+ 0,6%
Broiler	11.289	11.544	11.732	11.925	11.993	12.060	+ 0,6%	+ 0,6%
Turkey	1.946	2.013	1.888	1.741	1.802	1.811	+ 3,5%	+ 0,5%
Duck	518	452	458	364	396	408	+ 8,7%	+ 2,9%
Total Rabbit	180	164	136	123	95	94	- 22,3%	- 1,0%









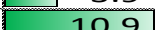













































FORECAST

EU production of poultry (expert forecast Autumn 2023)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022		%2024/2023	
PL	3,106,030	3,031,300	3,031,300		-2.4		0.0
DE	1,752,000	1,760,000	1,770,000		0.5		0.6
FR	1,577,100	1,577,600	1,577,600		0.0		0.0
ES	1,462,693	1,520,424	1,520,424		3.9		0.0
IT	1,218,000	1,351,000	1,359,000		10.9		0.6
NL	1,119,000	1,119,000	1,119,000		0.0		0.0
HU	655,100	694,470	731,400		6.0		5.3
RO	455,000	467,000	490,000		2.6		4.9
BE	441,250	448,300	448,300		1.6		0.0
PT	354,630	368,000	368,000		3.8		0.0
EL	296,500	296,500	296,500		0.0		0.0
IE	228,000	212,000	216,050		-7.0		1.9
SE	187,000	192,000	192,000		2.7		0.0
CZ	191,400	166,400	166,400		-13.1		0.0
DK	156,700	158,900	162,500		1.4		2.3
AT	151,814	151,810	151,810		-0.0		0.0
FI	146,800	149,000	152,100		1.5		2.1
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	75,000	78,100	78,500		4.1		0.5
HR	61,270	61,270	61,270		0.0		0.0
CY	27,150	27,150	27,150		0.0		0.0
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	14,065,437	14,231,724	14,320,804		1.2		0.6

FORECAST

EU production of broiler (expert forecast Autumn 2023)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	2,600,000	2,520,000	2,520,000	-3.1	0.0
DE	1,387,000	1,395,000	1,400,000	0.6	0.4
ES	1,264,836	1,302,781	1,302,781	3.0	0.0
FR	1,182,100	1,179,900	1,179,900	-0.2	0.0
NL	1,100,000	1,100,000	1,100,000	0.0	0.0
IT	992,000	1,067,000	1,075,000	7.6	0.7
HU	464,610	495,140	519,900	6.6	5.0
BE	435,060	441,500	441,500	1.5	0.0
RO	435,000	450,000	470,000	3.4	4.4
PT	300,040	305,000	305,000	1.7	0.0
EL	282,400	282,400	282,400	0.0	0.0
IE	190,000	175,000	178,000	-7.9	1.7
SE	182,000	187,000	187,000	2.7	0.0
DK	151,500	154,700	158,000	2.1	2.1
CZ	170,000	145,000	145,000	-14.7	0.0
FI	138,000	140,000	143,000	1.4	2.1
AT	128,404	128,400	128,400	-0.0	0.0
LT	130,000	130,000	130,000	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	69,500	72,300	72,700	4.0	0.6
HR	61,270	61,270	61,270	0.0	0.0
CY	27,000	27,000	27,000	0.0	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	11,924,900	11,992,571	12,060,031	0.6	0.6

EU production of turkey (expert forecast Autumn 2023)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	405,000	408,000	408,000	0.7	0.0
DE	335,000	335,000	340,000	0.0	1.5
IT	219,000	275,000	275,000	25.6	0.0
FR	252,000	235,400	235,400	-6.6	0.0
ES	197,857	217,643	217,643	10.0	0.0
HU	102,960	97,320	97,500	-5.5	0.2
PT	45,650	53,000	53,000	16.1	0.0
IE	32,500	32,000	32,500	-1.5	1.6
NL	28,000	28,000	28,000	0.0	0.0
RO	20,000	17,000	20,000	-15.0	17.6
HR	18,000	18,000	18,000	0.0	0.0
AT	21,560	21,560	21,560	0.0	0.0
EL	14,100	14,100	14,100	0.0	0.0
CZ	10,000	10,000	10,000	0.0	0.0
FI	8,800	9,000	9,100	2.3	1.1
BE	6,190	6,800	6,800	9.9	0.0
SI	5,500	5,800	5,800	5.5	0.0
LT	5,500	5,500	5,500	0.0	0.0
SE	5,000	5,000	5,000	0.0	0.0
SK	3,000	3,000	3,000	0.0	0.0
DK	5,100	4,200	4,500	-17.6	7.1
CY	150	150	150	0.0	0.0
BG					
LV					
EE					
MT					
EU27	1,740,967	1,801,573	1,810,653	3.5	0.5

10 October 2023

FORECAST

EU production of duck (expert forecast Autumn 2023)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
FR	118,300	135,900	135,900	14.9	0.0
HU	70,350	81,660	92,500	16.1	13.3
PL	73,640	75,500	75,500	2.5	0.0
DE	26,000	26,000	26,000	0.0	0.0
BG	22,000	21,500	21,500	-2.3	0.0
NL	19,000	19,000	19,000	0.0	0.0
CZ	11,000	11,000	11,000	0.0	0.0
PT	8,940	10,000	10,000	11.9	0.0
IE	5,500	5,000	5,550	-9.1	11.0
IT	3,000	4,000	4,000	33.3	0.0
ES	4,100	4,100	4,100	0.0	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	364,345	396,175	407,565	8.7	2.9

EU production of rabbit (expert forecast Autumn 2023)

Source : Experts WG

Qty in Tonnes

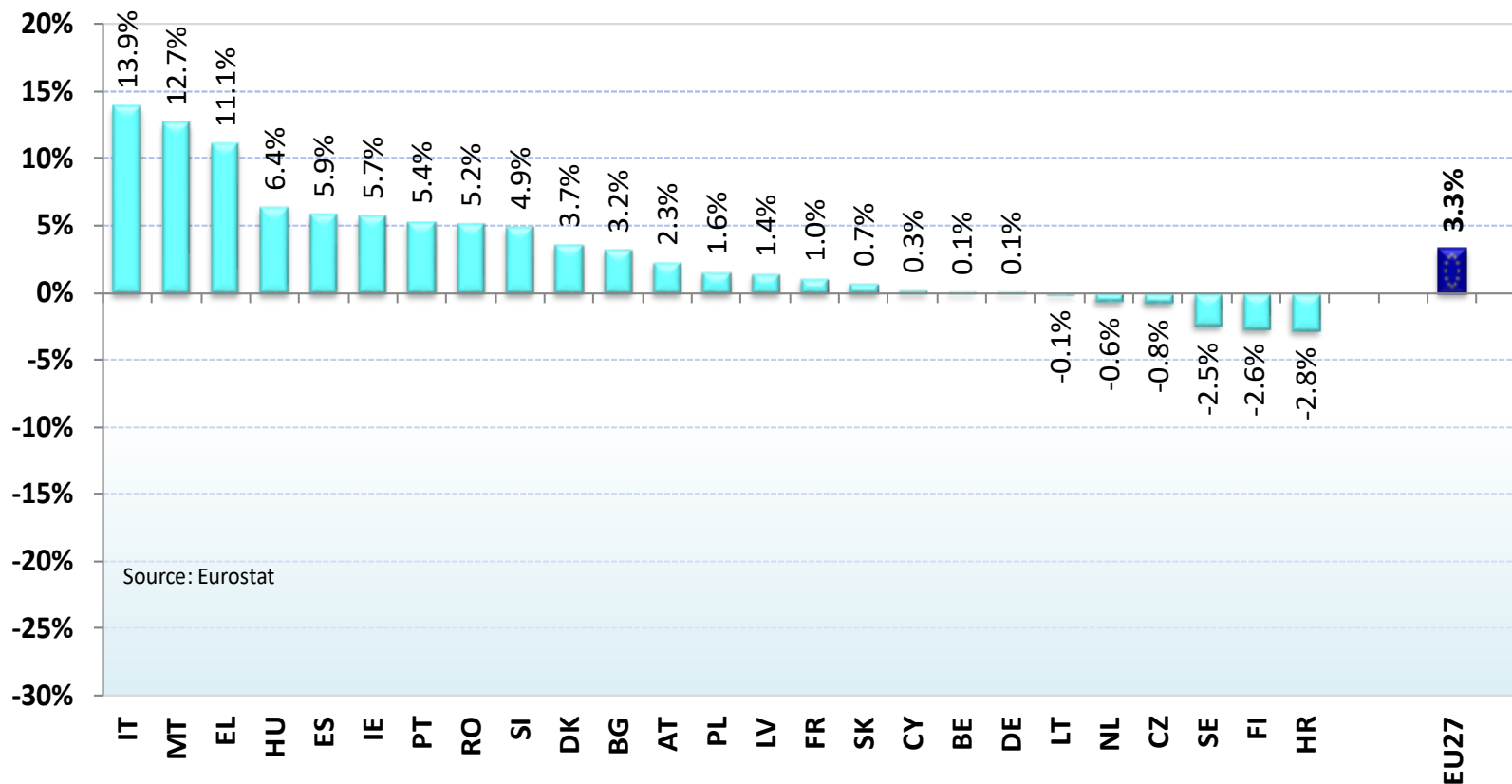
% change

	2022	2023	2024	%2023/2022	%2024/2023
IT	26,000	24,000	23,000	-7.7	-4.2
FR	23,600	21,500	21,500	-8.9	0.0
ES	40,958	18,164	18,164	-55.7	0.0
PL	10,000	9,500	9,500	-5.0	0.0
CZ	9,000	9,000	9,000	0.0	0.0
EL	5,000	5,000	5,000	0.0	0.0
PT	3,840	3,840	3,840	0.0	0.0
SK	3,600	3,600	3,600	0.0	0.0
CY	530	530	550	0.0	3.8
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	122,770	95,366	94,386	-22.3	-1.0

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PRODUCTION

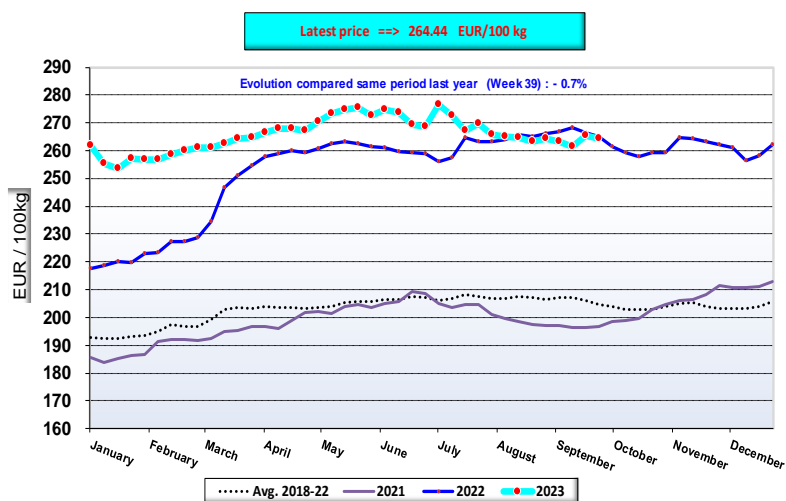
Change in Poultry Meat Production in % 2023/2022 (up to July)



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Weekly prices of poultry products

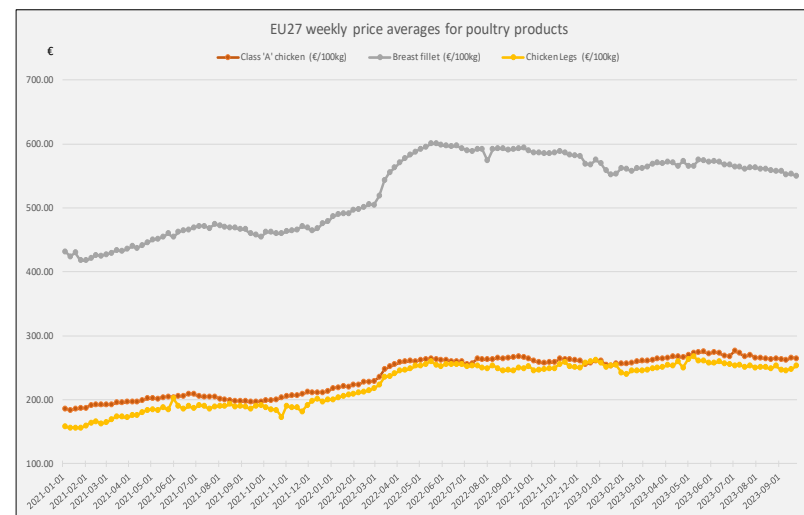
Evolution of the weekly EU* average price for **Broiler**



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

* EU without UK

Week - 39 EU27 weekly price averages for poultry products



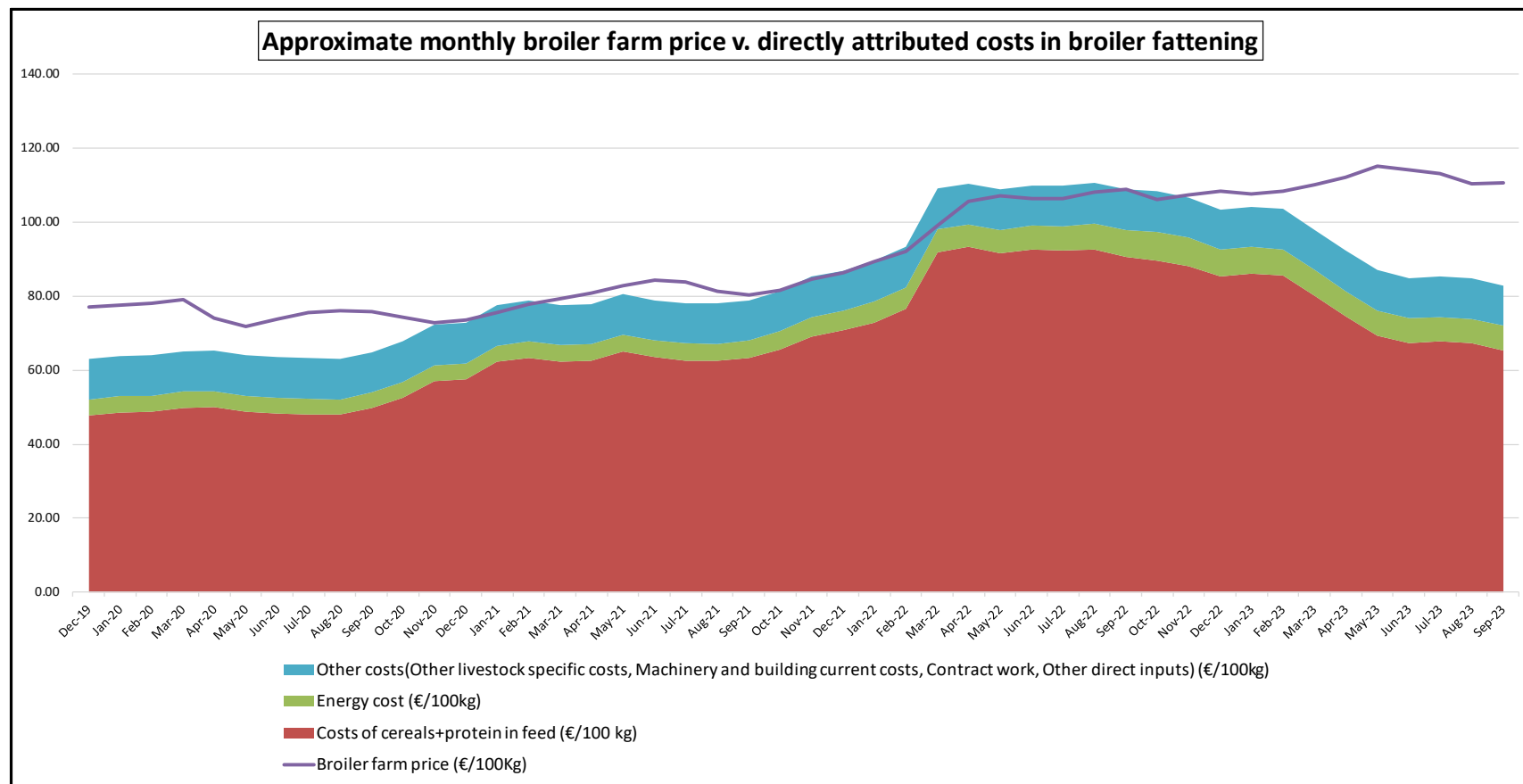
Week - 39	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	264.42	550.33	252.63

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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COST BROILER PRODUCTION



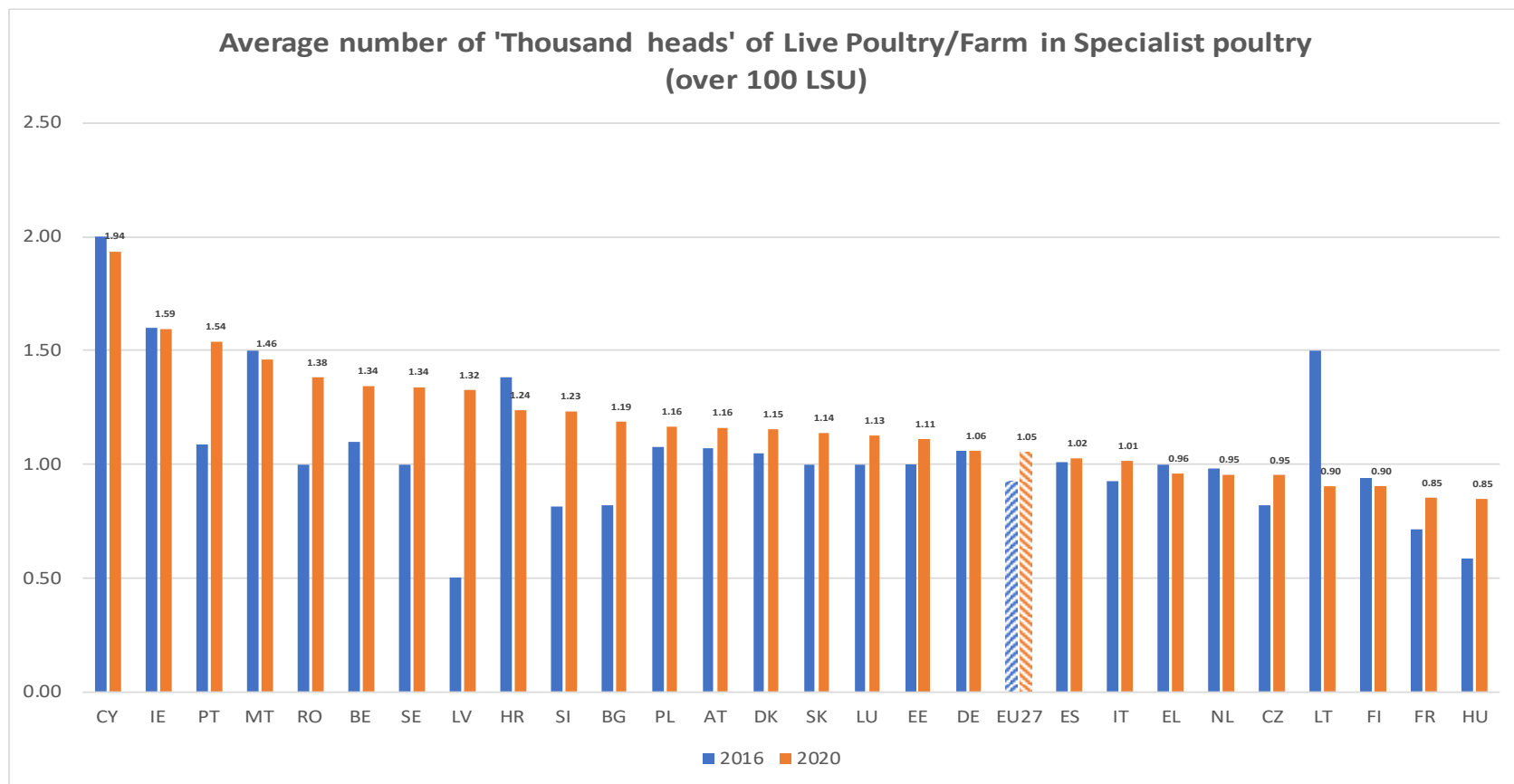
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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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FARM STRUCTURE SURVEY

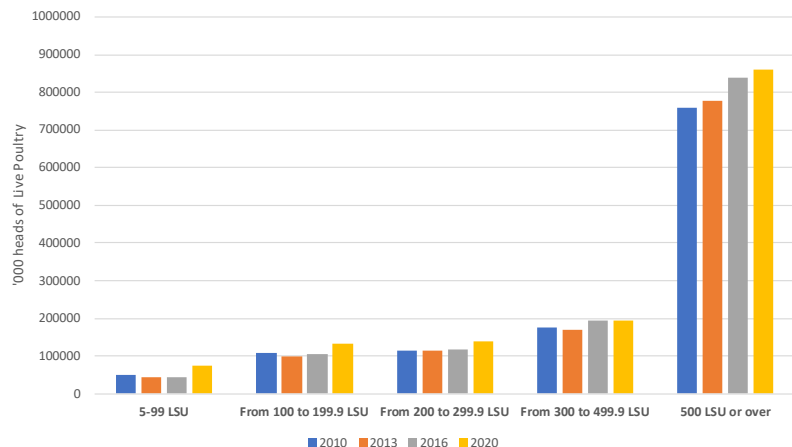


Specialist poultry - EU

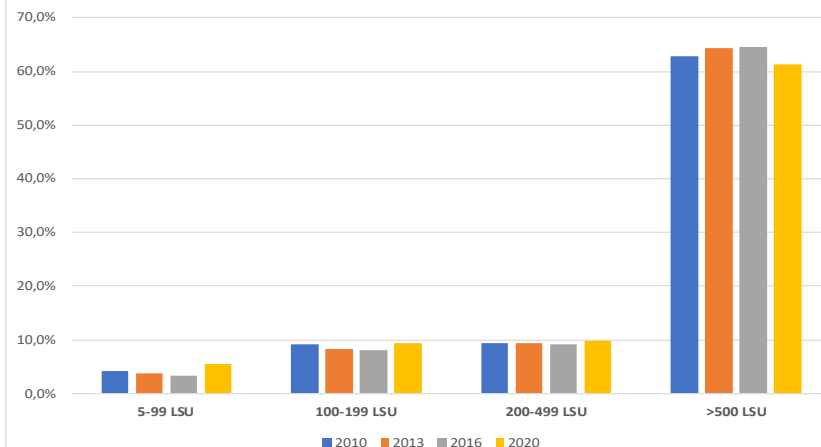
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 20/10)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY

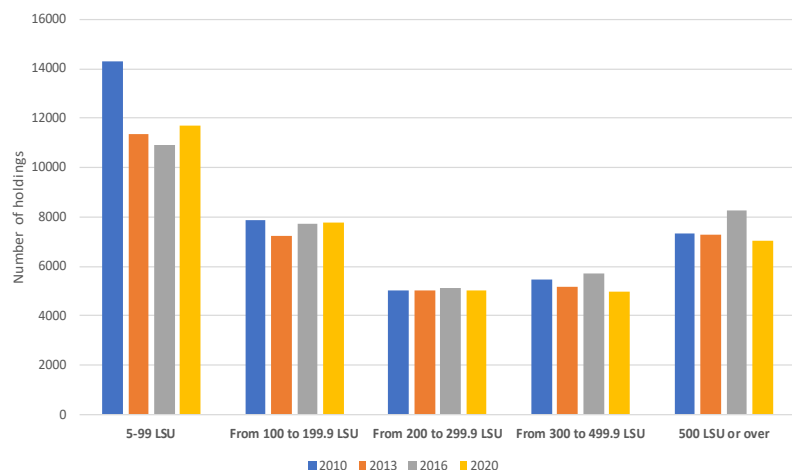
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



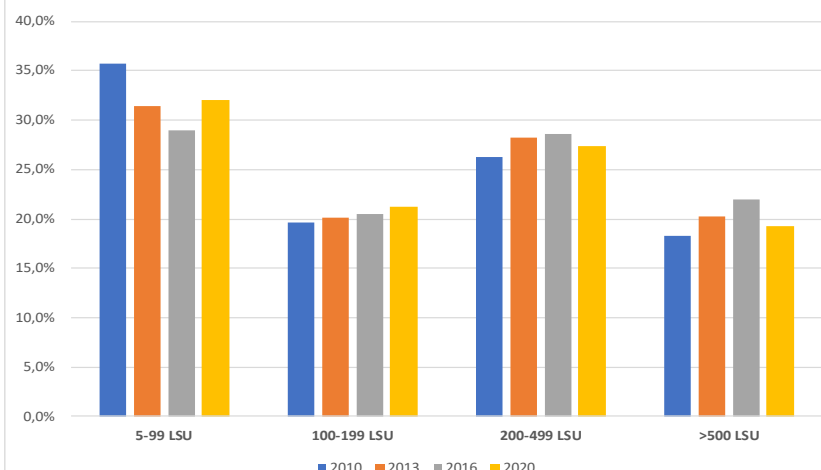
Share of animals by LSU class (over 5 LSU)



Number of holdings by LSU class in Specialist poultry (over 5 LSU)



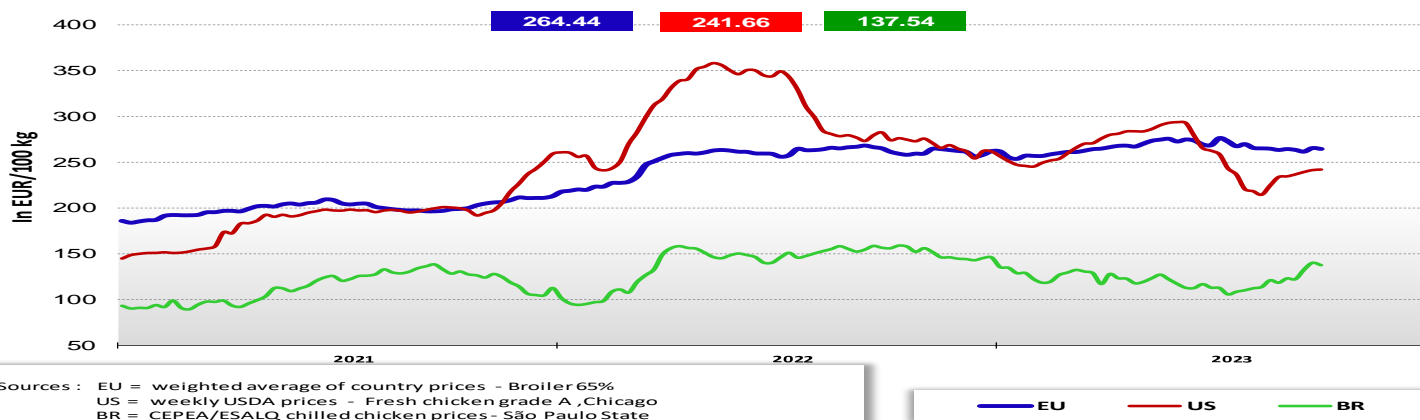
Share of holdings by LSU class (over 5 LSU)



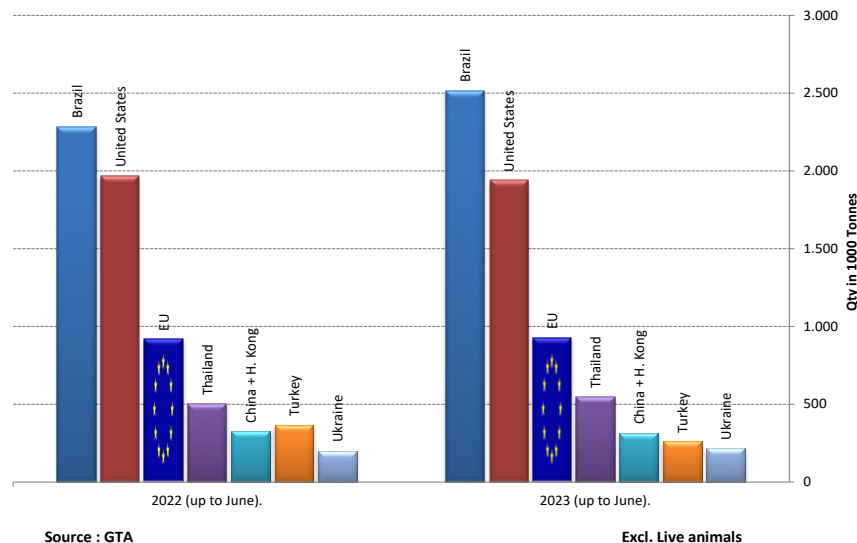
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INTERNATIONAL

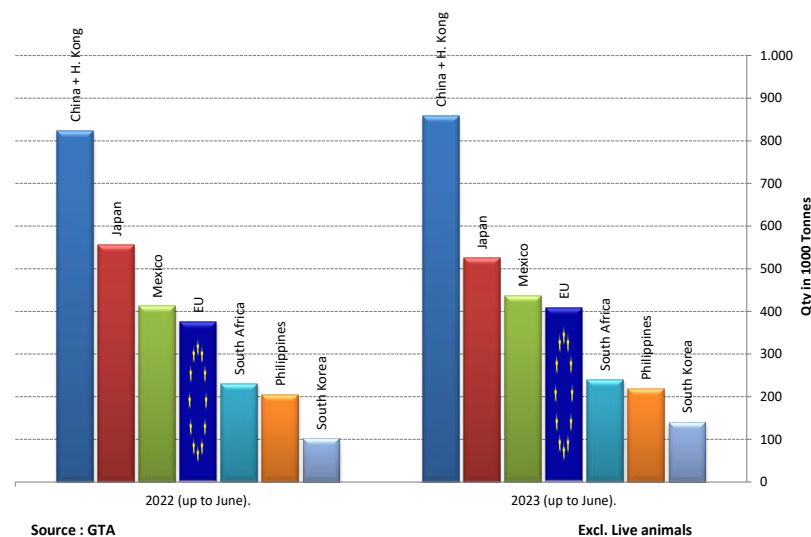
Broiler prices in EU, USA and Brazil



Main Exporters of POULTRY Products (up to June).



Main Importers of POULTRY Products (up to June).



10 October 2023

EU-27 Exports of poultry meat to selected destinations

In Tons of Carcase Weight

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	725,611	32%	754,234	37%	388,873	39%	+4%
Ghana	228,123	10%	156,295	8%	69,444	7%	-25%
Congo (Dem. Rep.)	139,852	6%	125,921	6%	45,041	5%	-11%
Ukraine	162,272	7%	105,814	5%	44,219	4%	-8%
Benin	64,358	3%	63,525	3%	36,842	4%	+9%
Saudi Arabia	58,457	3%	74,582	4%	30,350	3%	+4%
Vietnam	31,784	1%	29,764	1%	21,786	2%	+++
Uzbekistan	32,390	1%	34,479	2%	19,325	2%	+36%
Cuba	11,056	0%	38,167	2%	18,683	2%	+62%
Congo	30,303	1%	35,588	2%	18,512	2%	+33%
Switzerland	33,390	1%	33,752	2%	18,000	2%	+2%
Other Destinations	734,895	33%	600,372	29%	273,416	28%	-6%
Extra-EU	2,252,492		2,052,491		984,488		-0.0%
% Change			-9%				

In Thousand Euros

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	2,009,674	51%	2,647,068	56%	1,304,574	56%	+5.2%
Ghana	224,132	6%	167,700	4%	72,721	3%	-25.4%
Congo (Dem. Rep.)	116,553	3%	145,772	3%	54,645	2%	-2.0%
Ukraine	119,561	3%	102,774	2%	68,949	3%	+59.7%
Benin	87,264	2%	106,959	2%	61,928	3%	+14.2%
Saudi Arabia	93,283	2%	159,672	3%	56,081	2%	-6.1%
Vietnam	35,592	1%	39,547	1%	26,627	1%	+++
Uzbekistan	23,945	1%	27,742	1%	15,869	1%	+34.2%
Cuba	12,697	0%	38,523	1%	17,364	1%	+18.5%
Congo	26,636	1%	36,298	1%	16,295	1%	+23.9%
Switzerland	179,202	5%	210,077	4%	110,616	5%	+12.0%
Other Destinations	1,043,964	26%	1,051,568	22%	525,441	23%	+9.4%
Extra-EU	3,972,503		4,733,700		2,331,113		+6.9%
% Change			+19.2%				

EU-27 Imports of poultry meat from selected origins

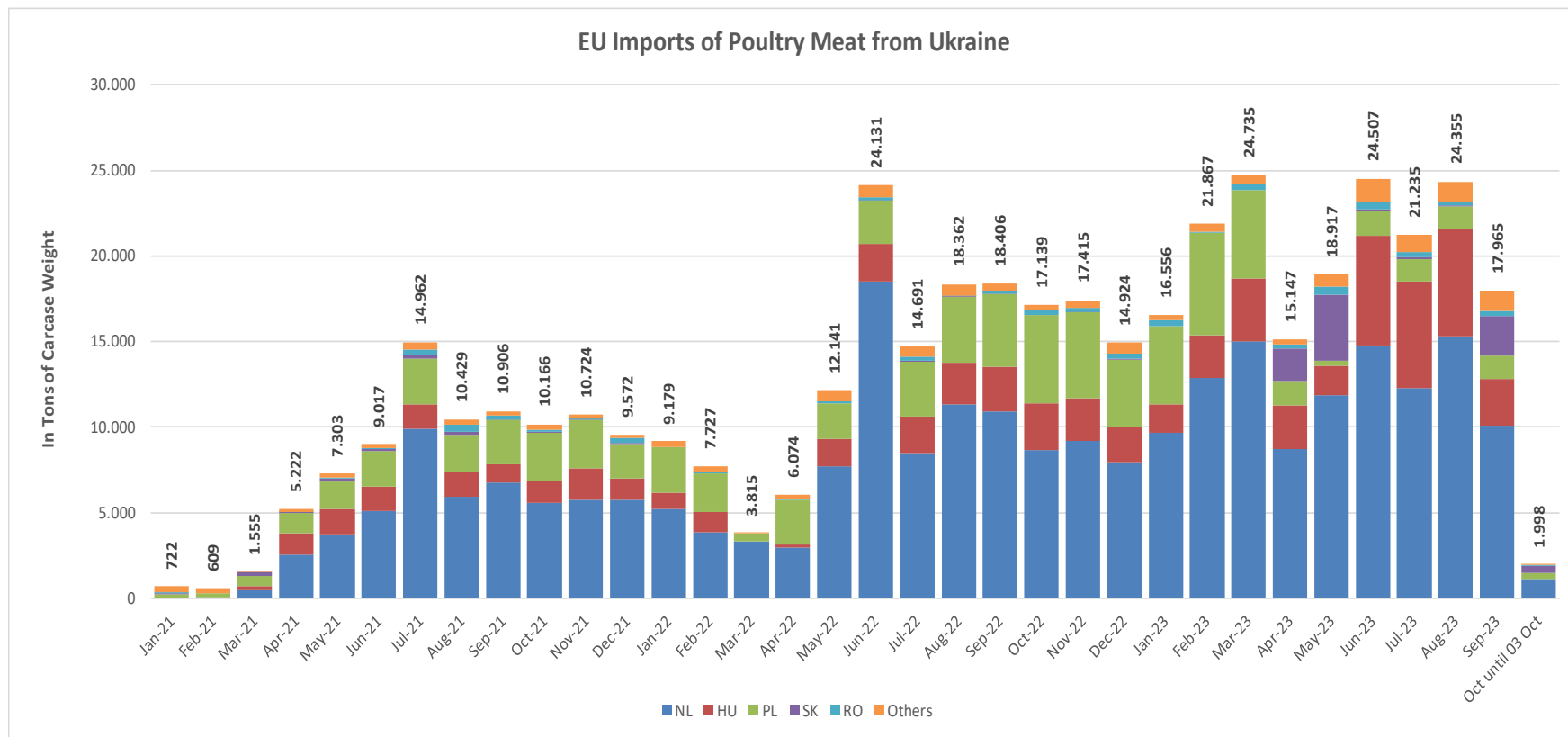
In Tons of Carcase Weight

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
Brazil	251,902	32%	301,065	35%	165,068	35%	+9%
Ukraine	102,892	13%	162,811	19%	122,405	26%	+96%
Thailand	130,658	16%	131,285	15%	89,691	19%	+35%
United Kingdom	274,667	34%	211,399	25%	62,221	13%	-45%
China	20,916	3%	32,879	4%	19,079	4%	+26%
Bosnia-Herz.	1,608	0%	3,000	0%	1,741	0%	+41%
Chile	2,441	0%	466	0%	1,320	0%	+++
Argentina	3,151	0%	4,096	0%	1,233	0%	-43%
Norway	2,508	0%	2,091	0%	1,086	0%	-3%
Switzerland	2,310	0%	2,184	0%	997	0%	-13%
Tunisia	1,840	0%	1,721	0%	463	0%	-45%
Other Destinations	2,179	0%	2,150	0%	930	0%	-21%
Extra-EU	797,071		855,147		466,235		+12.0%
% Change			7%				

In Thousand Euros

	2021		2022		Jan to Jun 2023		Compared to Jan to Jun 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
Brazil	388,530	29%	669,371	32%	347,742	31%	+10.5%
Ukraine	166,208	12%	324,751	15%	218,934	19%	+74.6%
Thailand	317,487	24%	519,137	24%	292,495	26%	+31.9%
United Kingdom	327,280	24%	363,693	17%	149,242	13%	-14.9%
China	95,081	7%	186,249	9%	99,064	9%	+22.7%
Bosnia-Herz.	10,345	1%	10,728	1%	5,112	0%	-1.2%
Chile	6,019	0%	1,537	0%	3,297	0%	+++
Argentina	6,508	0%	11,463	1%	3,965	0%	-29.7%
Norway	7,914	1%	8,267	0%	4,399	0%	-3.8%
Switzerland	5,300	0%	9,569	0%	3,570	0%	-8.0%
Tunisia	1,140	0%	1,702	0%	347	0%	-56.5%
Other Destinations	14,325	1%	16,764	1%	10,342	1%	+40.6%
Extra-EU	1,346,138		2,123,231		1,138,508		+20.3%
% Change			+57.7%				

EU-27 Imports of poultry meat from Ukraine



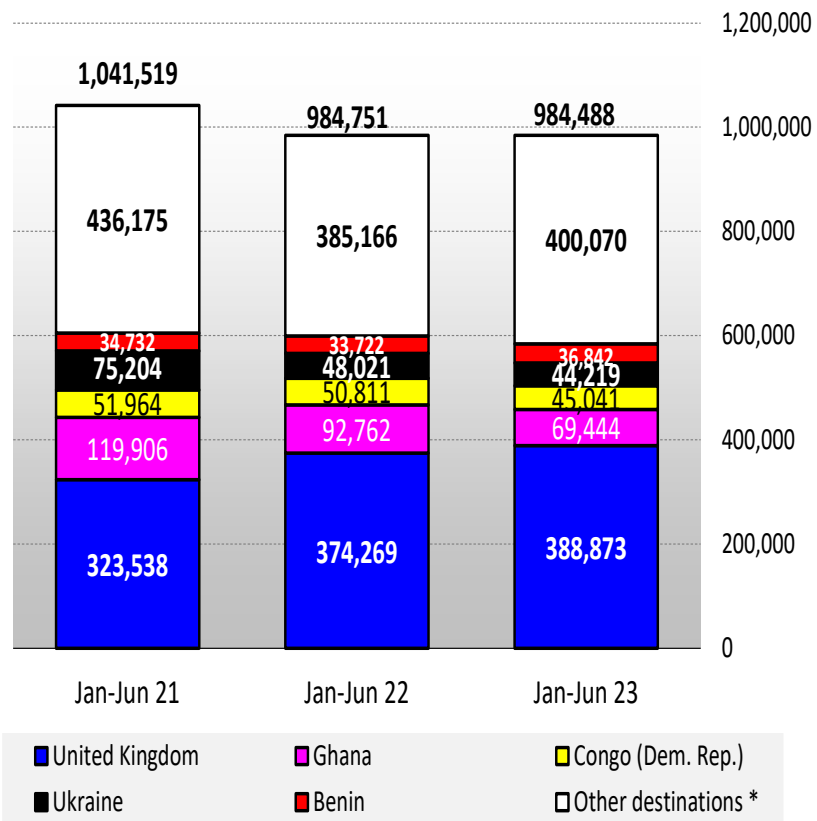
DG AGRI E3, source: **TAXUD surveillance**.

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

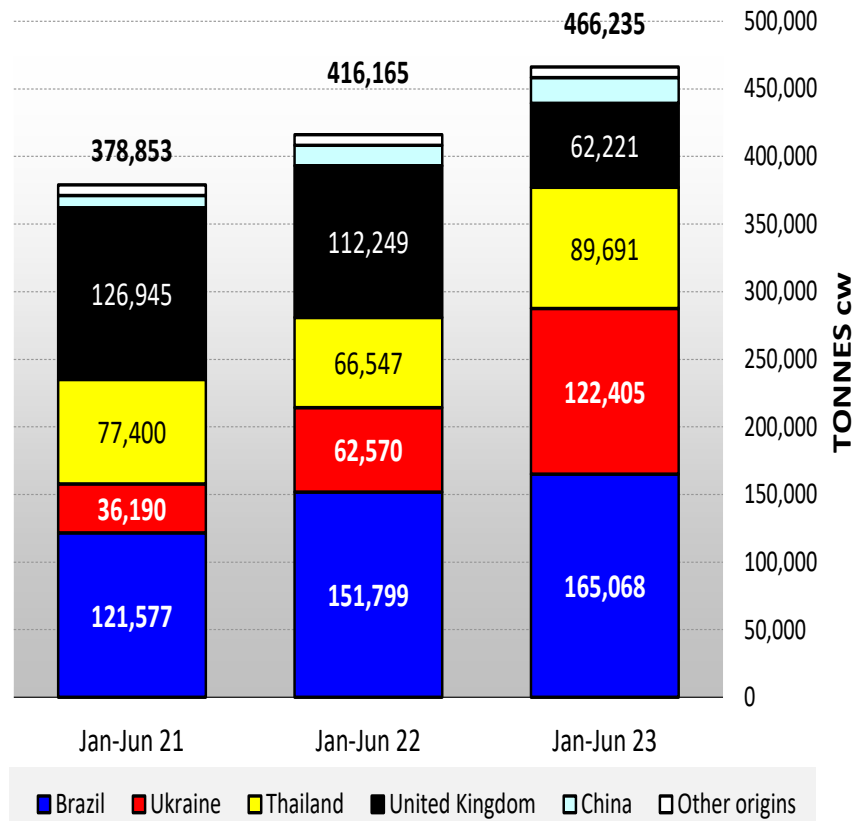
TRADE

EU EXPORTS vs IMPORTS

EU EXPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (TONNES cwe)

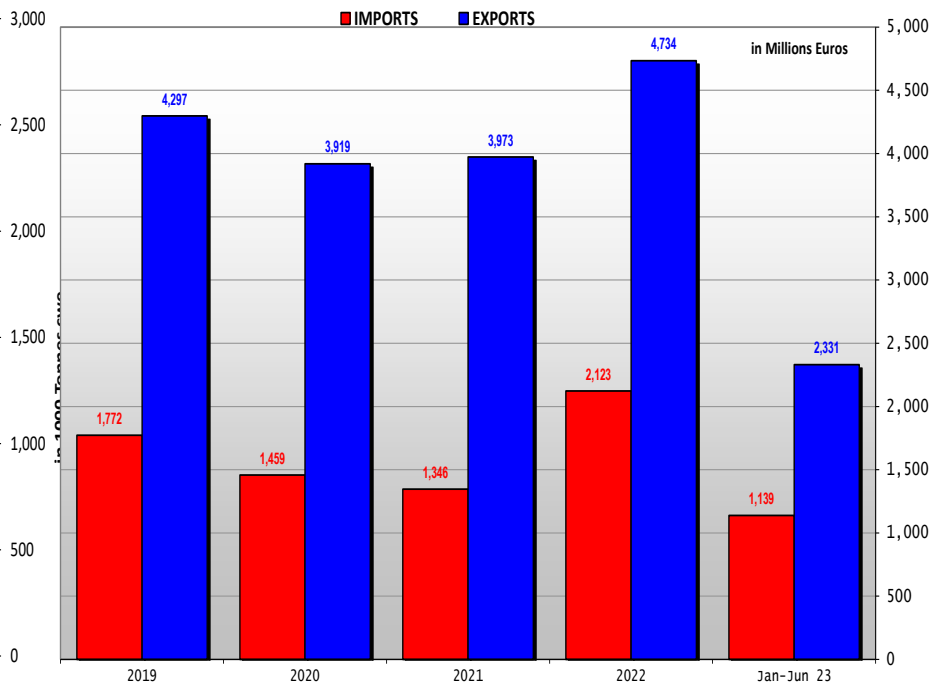
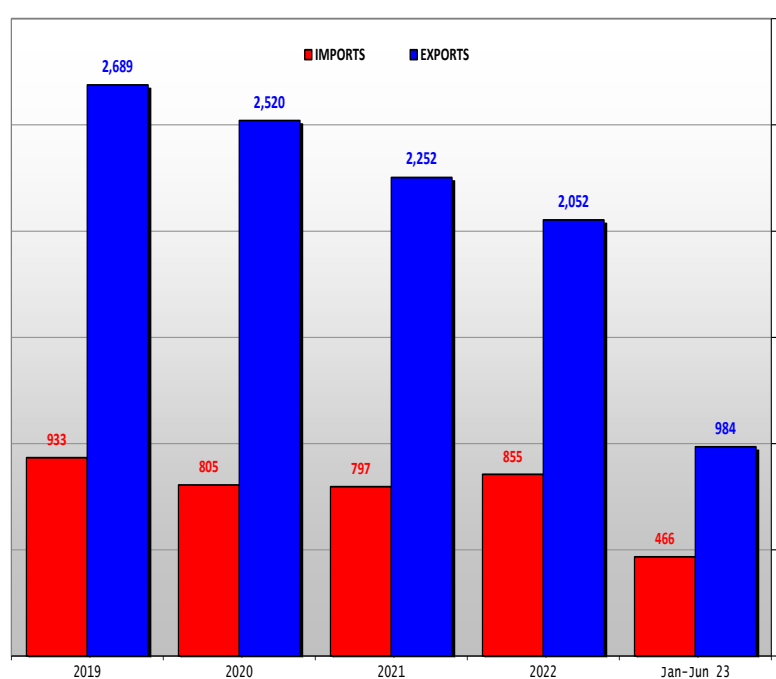


TRADE

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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