

EU Market Situation for Poultry



Civil Dialogue Group on Poultry & Eggs

17 September 2024

EU production of poultry

Qty in Tonnes

% change

Source : Eurostat, forecast 2024 by MS

	2022	2023	%2023/2022	trend 2024/2023
PL	2,729,890	2,746,040	0.6	↗
ES	1,638,640	1,718,430	4.9	↗
DE	1,543,000	1,563,000	1.3	↑
FR	1,503,580	1,533,410	2.0	↑
IT	1,213,160	1,334,140	10.0	↗
NL	863,970	849,620	-1.7	↘
HU	479,880	514,810	7.3	→
RO	491,220	510,690	4.0	↗
BE	449,040	428,200	-4.6	↑
PT	370,980	380,740	2.6	↗
EL	248,770	273,890	10.1	↑
SE	176,120	175,860	-0.1	↘
CZ	169,970	167,690	-1.3	↑
IE	170,940	167,650	-1.9	↑
DK	151,920	159,200	4.8	↗
AT	143,580	150,470	4.8	↑
FI	147,130	143,580	-2.4	↗
BG	119,530	120,890	1.1	↗
LT	86,280	85,950	-0.4	↘
SK	77,370	77,360	-0.0	↘
SI	73,660	75,250	2.2	↗
HR	71,620	72,090	0.7	↗
LV	36,600	37,080	1.3	↗
CY	27,260	27,770	1.9	↗
MT	4,250	4,740	11.5	→
EE	0	0		
EU27	12,988,360	13,318,550	2.5	↗

+5%+	↑
0%+ and <+5%	↗
0%	→
-5%+ and <0%	↘
<-5%	↓

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FORECAST

EU production of broiler

Qty in Tannes
Source : Eurostat, forecast 2024 by MS

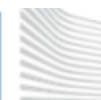
	2022	2023	% 2023/2022	trend 2024/2023
PL	2,231,610	2,284,950	2.4	↗
ES	1,349,990	1,401,860	3.8	↗
FR	1,114,430	1,128,280	1.2	↗
IT	993,950	1,083,180	9.0	↘
DE	1,076,000	1,083,000	0.7	↗
NL	863,970	849,620	-1.7	↘
RO	475,450	500,760	5.3	↗
BE	442,020	421,480	-4.6	↗
HU	348,840	378,980	8.6	→
PT	314,170	322,970	2.8	↗
EL	244,850	271,690	11.0	↗
SE	167,170	166,880	-0.2	↗
CZ	161,020	159,100	-1.2	↗
DK	151,730	159,030	4.8	↗
IE	144,730	137,010	-5.3	↗
FI	138,280	134,770	-2.5	↗
BG	90,580	90,540	-0.0	↗
LT	84,240	83,040	-1.4	↗
SI	68,440	69,660	1.8	↗
HR	58,960	60,220	2.1	↗
LV	36,560	37,060	1.4	↗
CY	27,110	27,680	2.1	↗
MT	4,250	4,740	11.5	→
SK	c	c		
EE	c	c		
AT	c	c		
EU27	10,588,350	10,856,500	2.5	↗

EU production of turkey

Qty in Tannes
Source : Eurostat, forecast 2024 by MS

	2022	2023	% 2023/2022	trend 2024/2023
DE	406,000	422,000	3.9	↘
PL	409,170	367,310	-10.2	↘
ES	231,590	248,030	7.1	↘
IT	211,130	242,750	15.0	↗
FR	244,920	240,230	-1.9	↗
HU	63,910	56,210	0.0	→
PT	45,650	44,590	-2.3	↗
IE	14,720	16,400	11.4	↗
FI	8,840	8,810	-0.3	↘
BE	0	6,570		↗
SI	5,220	5,590	7.1	↘
SE	4,690	4,680	-0.2	↗
EL	2,880	2,140	-25.7	↘
CZ	1,740	1,720	-1.1	↗
CY	150	90	0.0	→
LV	20	20	0.0	→
NL	0	10	0.0	→
DK	30	10	0.0	→
HR	0	0		
SK	0	0		
AT	0	0		
RO	0	0	0.0	→
LT				→
EE				
MT				
BG				→
EU27	1,650,660	1,667,160	1.0	↘

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EU production of duck

Qty in Tonnes
Source : Eurostat, forecast 2024 by MS

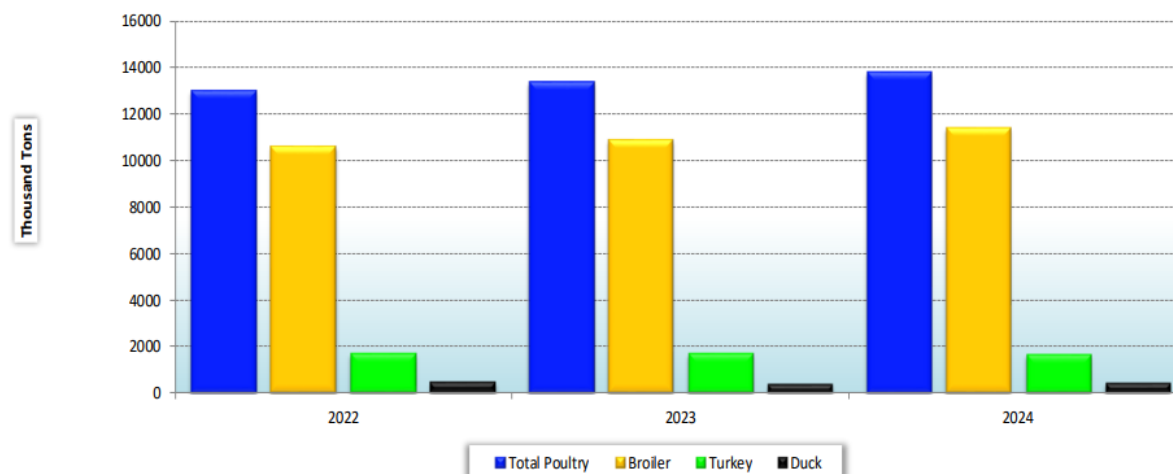
% change

	2022	2023	%2023/2022	trend 2024/2023
FR	178,700	136,500	-23.6	↑
PL	57,890	67,650	16.9	↑
HU	117,780	64,230	-45.5	→
DE	26,300	22,000	-16.3	↑
BG	22,240	24,890	11.9	↓
PT	9,720	11,890	22.3	↑
CZ	10,300	10,300	0.0	→
IE	5,500	5,500	0.0	→
ES	4,300	4,800	11.6	→
IT	4,000	2,530	-36.8	↑
HR	500	500	0.0	→
DK	100	140	40.0	→
BE		110	0.0	→
EL		20	0.0	→
NL			0.0	→
AT	0	0	0.0	→
SK	0	0	0.0	→
LT			0.0	→
SI				
SE	0	0		
RO				
FI				
CY				
LV				
EE				
MT				
EU27	437,330	351,060	-19.7	↑

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT



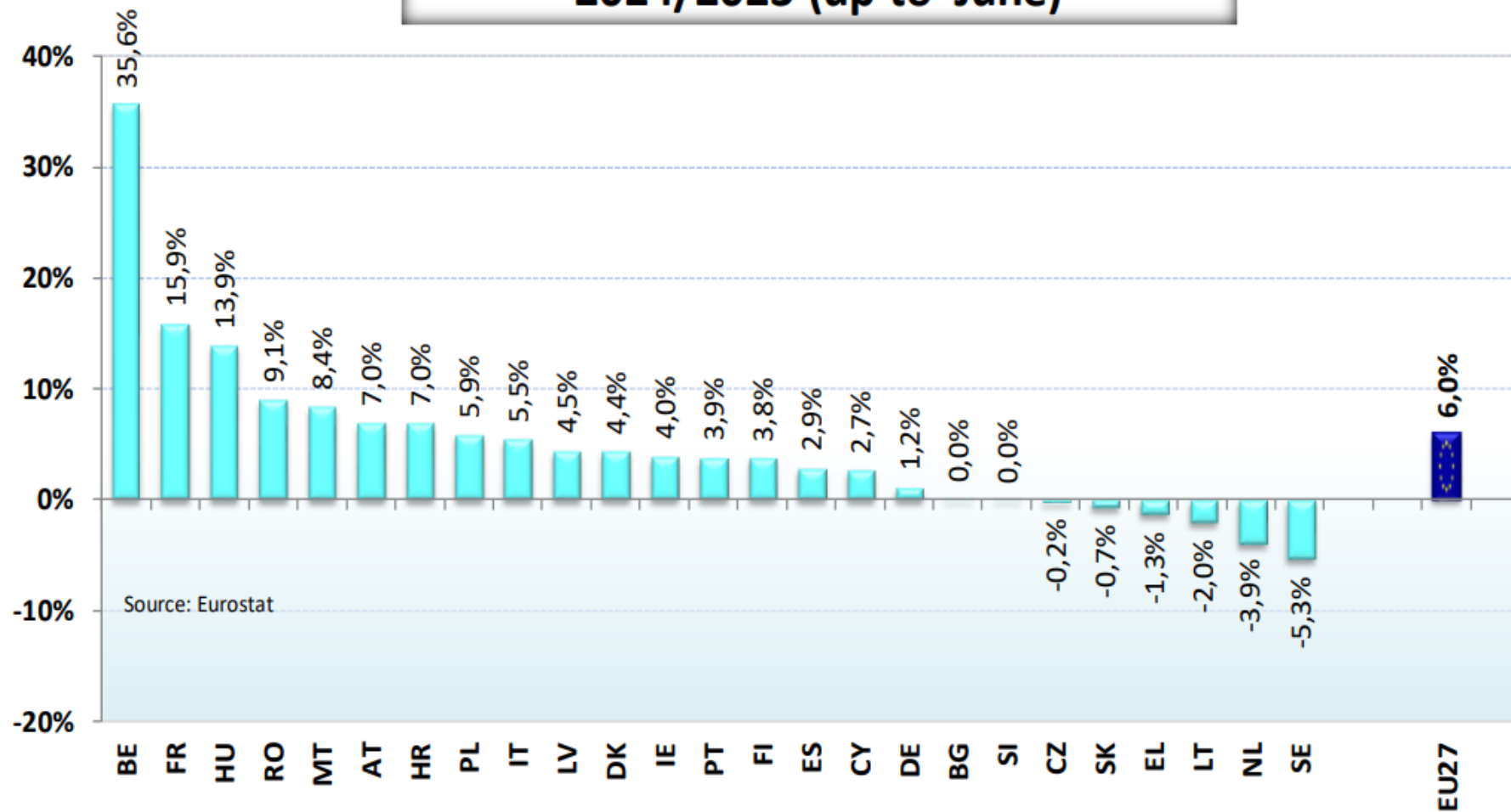
	2022	2023	2024	% 2023/2022	% 2024/2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* Source: Eurostat, forecast 2024 by MS

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PRODUCTION

Change in Poultry Meat Production in %
2024/2023 (up to June)



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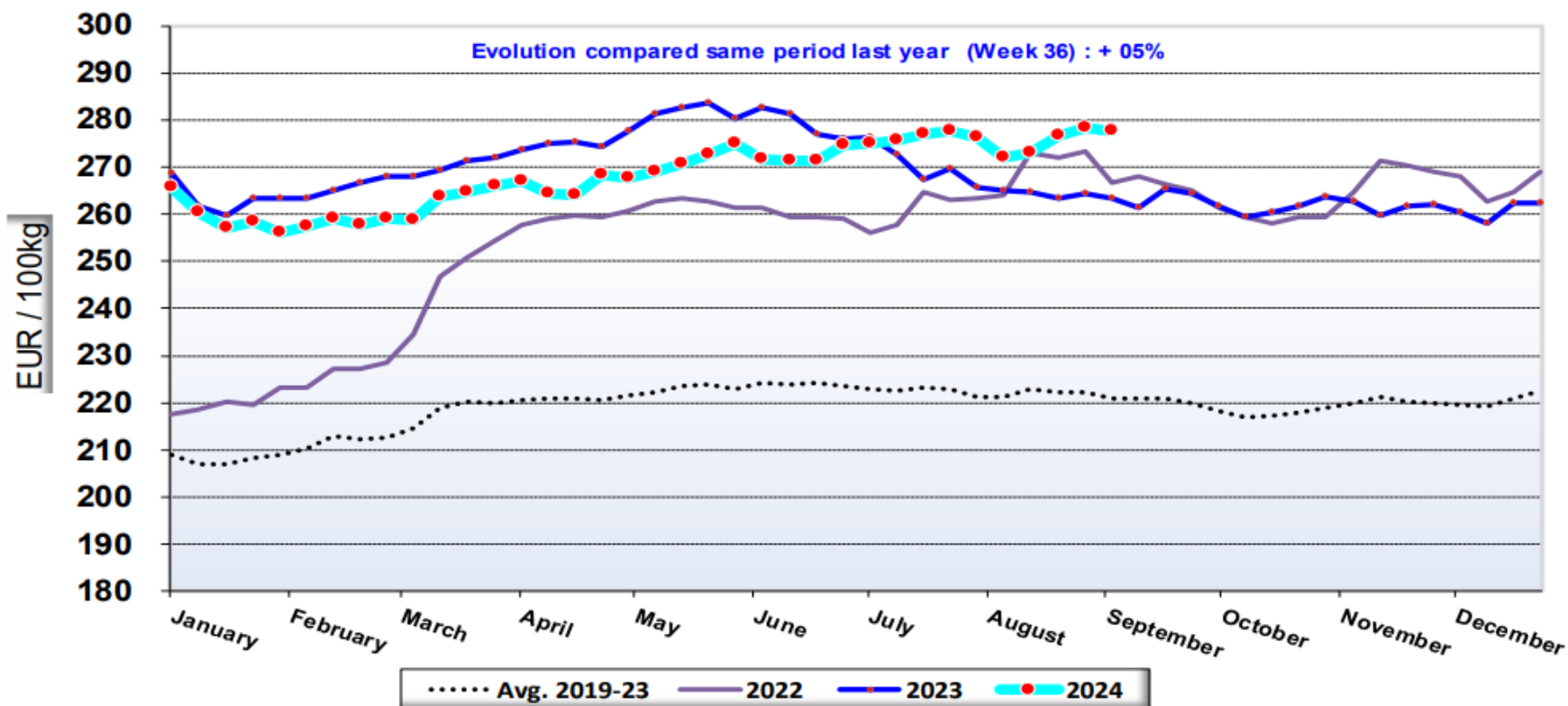


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EU WEEKLY PRICES

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

Latest price ==> 278 EUR/100 kg

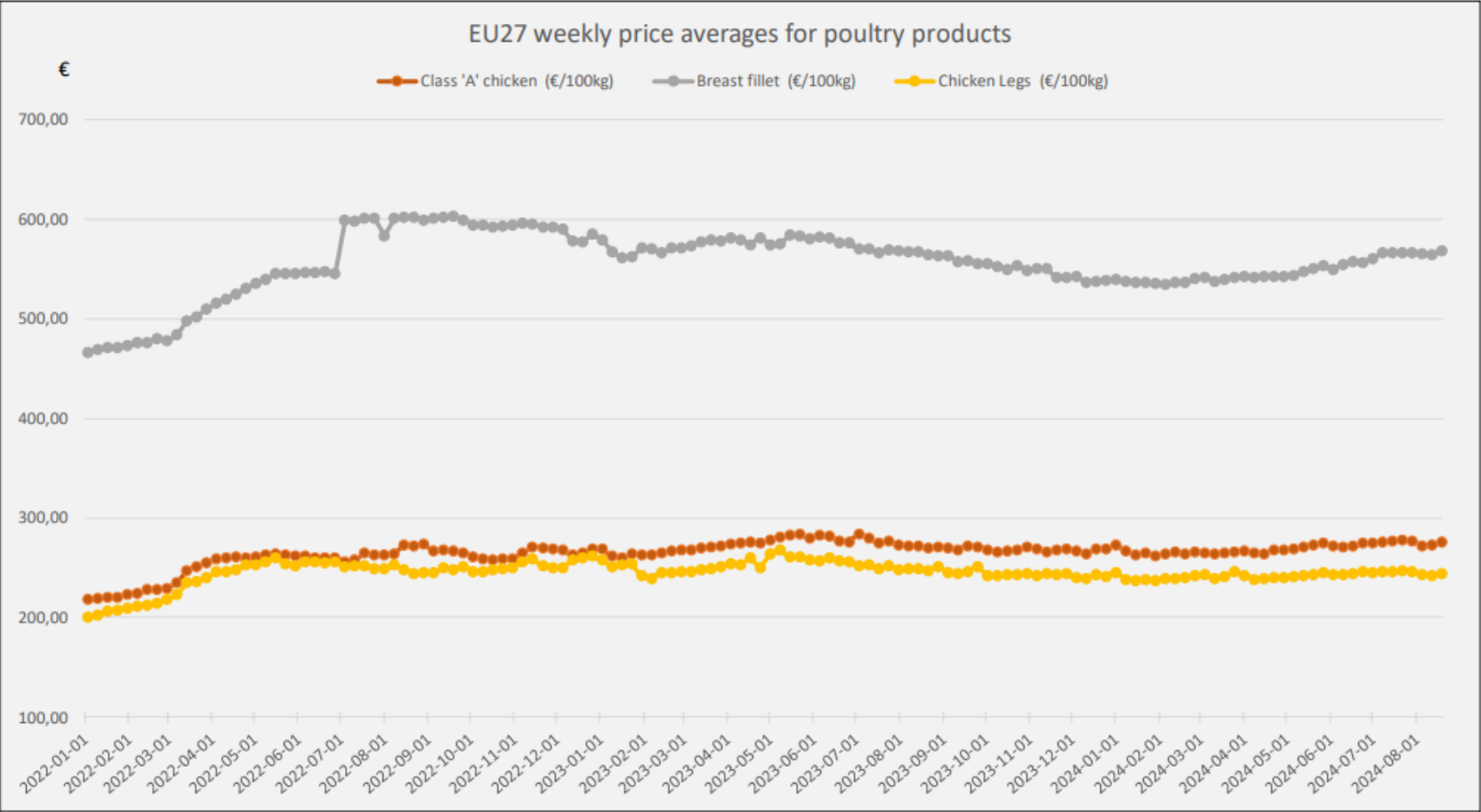


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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EU WEEKLY PRICES

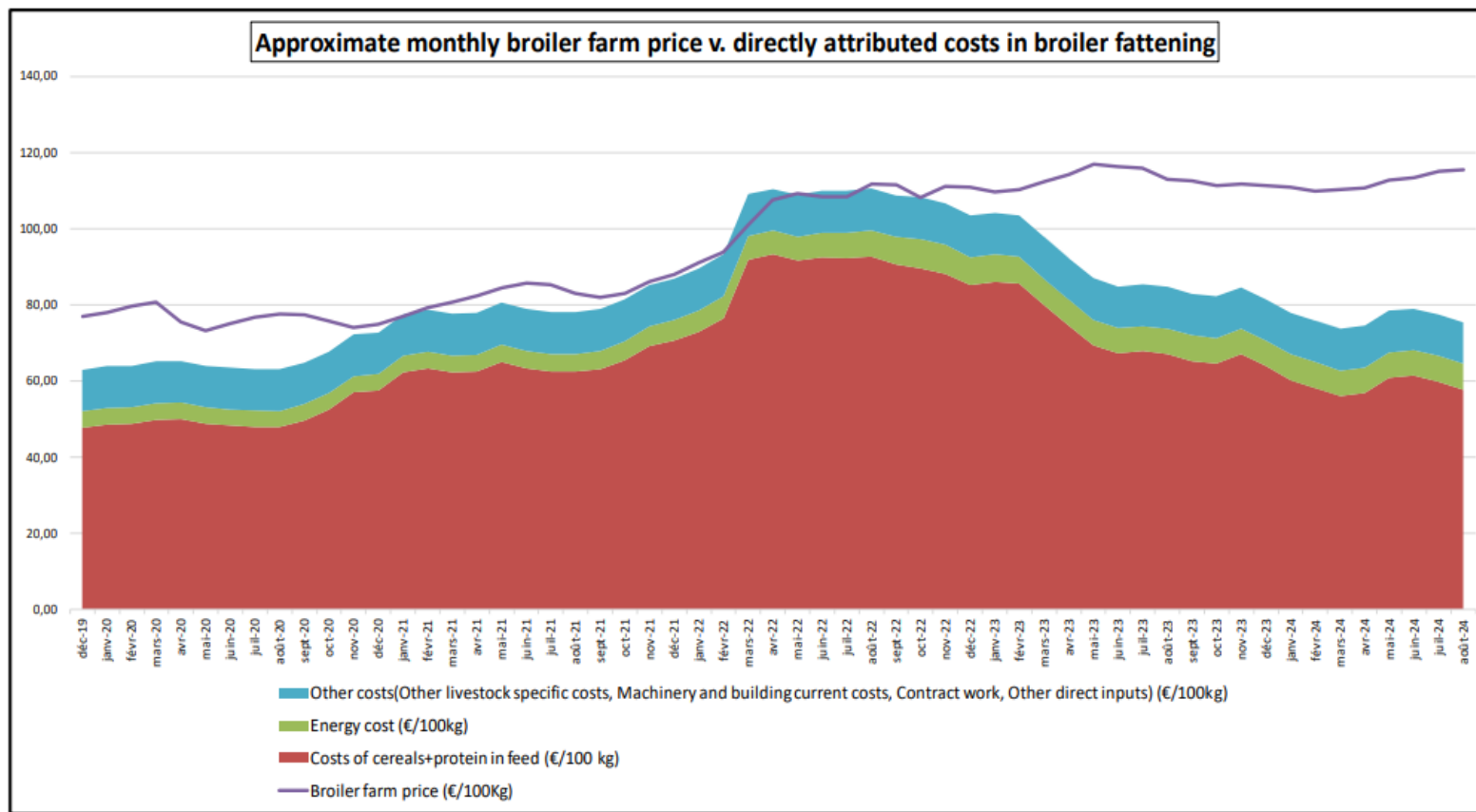
Week - 34 EU27 weekly price averages for poultry products



Week - 34	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	275,56	568,02	244,22

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COST BROILER PRODUCTION



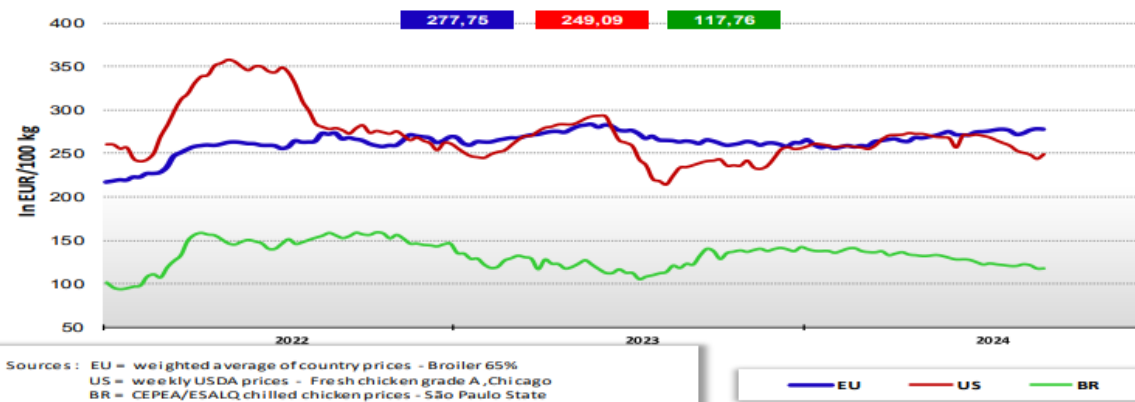
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !

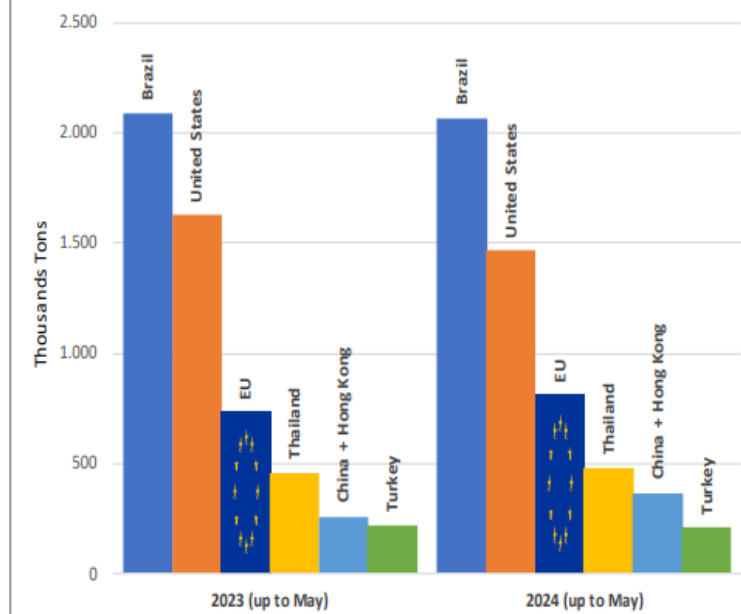
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INTERNATIONAL

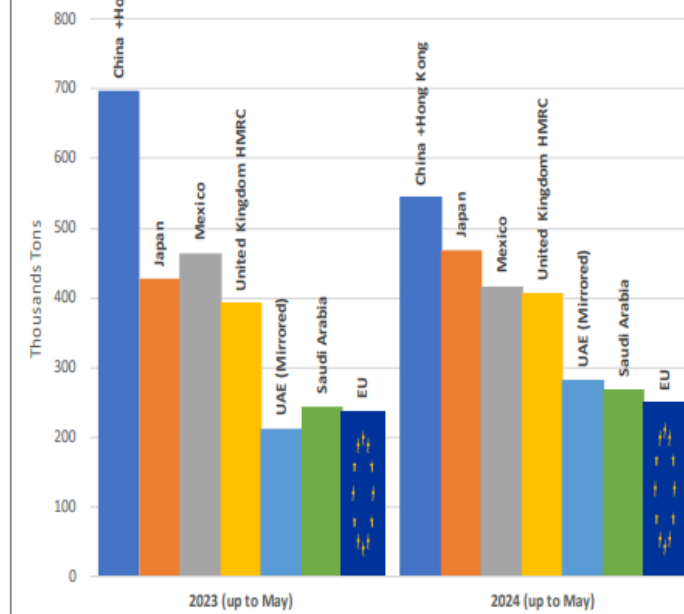
Broiler prices in EU, USA and Brazil



Main Exporters of POULTRY Products (up to May)
in Tons of Product



Main Importers of POULTRY Products (up to May)
in Tons of Product

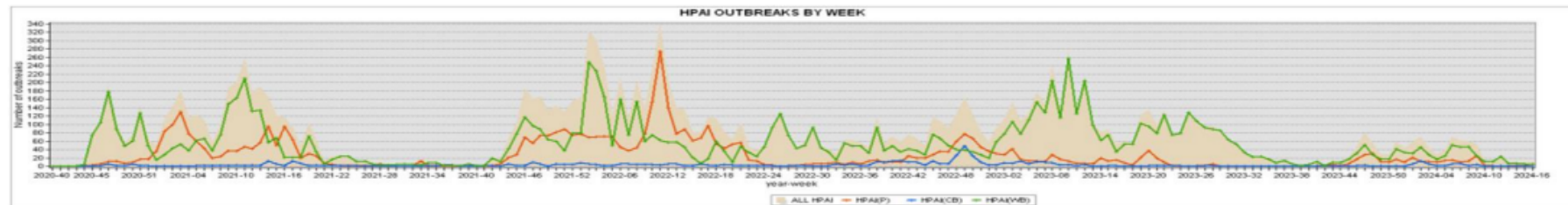


Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 10/09/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
BG	22	2.111.631	9%	29%
HU	84	1.750.174	36%	24%
PL	35	883.494	15%	12%
DE	32	661.205	14%	9%
FR	12	408.665	5%	6%
SK	7	295.369	3%	4%
DK	13	264.437	6%	4%
CZ	5	208.805	2%	3%
IT	6	187.647	3%	3%
Other MS	17	476.937	7%	7%
Grand Total	233	7.248.364	100%	100%

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	14	1.064.860	6,0%	14,7%
Laying hen	28	1.470.826	12,0%	20,3%
Duck	50	1.136.915	21,5%	15,7%
Turkey	73	1.658.532	31,3%	22,9%
Goose	24	131.616	10,3%	1,8%
Guinea fowl	1	17.256	0,4%	0,2%
Pheasant	2	9.785	0,9%	0,1%
Mixed	11	36.968	4,7%	0,5%
No information	30	1.721.606	12,9%	23,8%
Grand Total	233	7.248.364	100,0%	100,0%



https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en

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EU-27 Exports of poultry meat to selected destinations

EXPORT

In tons of carcass weight

	2022		2023		Jan-May 24		Compared to Jan-May 23
	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	732.508	36%	719.637	37%	311.123	35,6%	+ 4,3%
Ghana	156.456	8%	148.745	8%	57.804	6,6%	- 3,7%
Congo (Dem. Rep.)	125.421	6%	101.032	5%	43.041	4,9%	+ 22,4%
Saudi Arabia	74.590	4%	66.759	3%	34.194	3,9%	+ 37,4%
Vietnam	29.751	1%	54.214	3%	33.324	3,8%	+ 97,7%
Ukraine	105.810	5%	84.641	4%	26.241	3,0%	- 28,7%
Philippines	6.421	0%	4.270	0%	24.215	2,8%	+++
Congo	35.562	2%	46.994	2%	22.830	2,6%	+ 56,6%
Uzbekistan	34.474	2%	44.821	2%	17.322	2,0%	+ 4,2%
Guinea	32.876	2%	33.567	2%	16.542	1,9%	+ 25,0%
Other Destinations	696.365	34%	655.469	33%	288.481	33,0%	
Extra-EU	2.030.235		1.960.149		875.117		
% change	- 10%		- 3%		+ 12,3%		

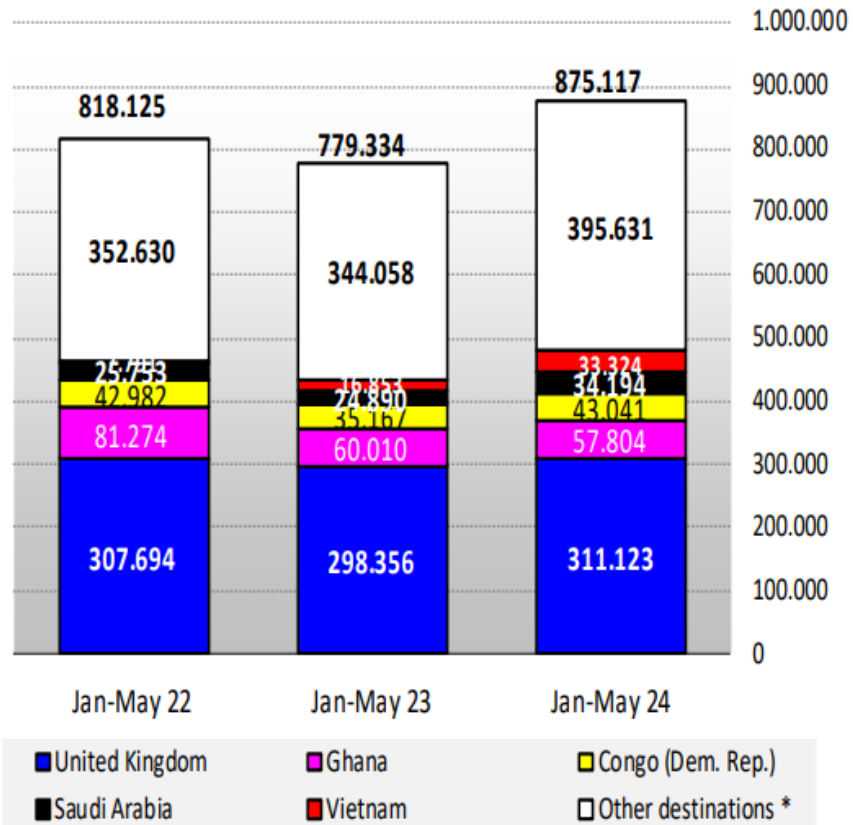
EXPORT

In 1000 euros

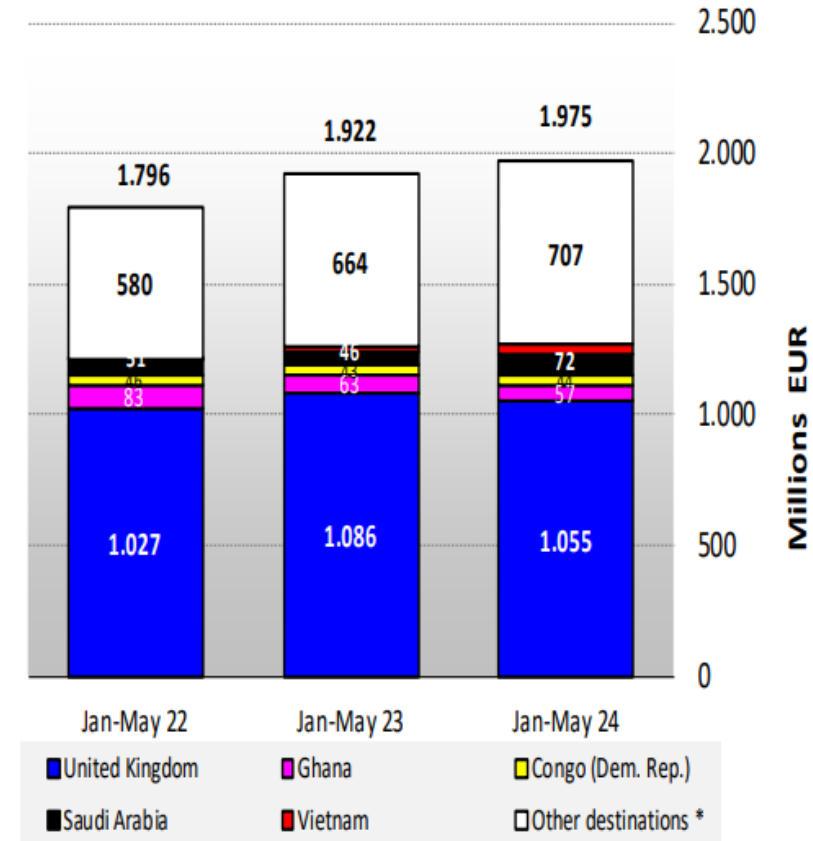
	2022		2023		Jan-May 24		Compared to Jan-May 23
	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	2.652.394	68%	2.588.910	66%	1.054.943	26,9%	- 2,8%
Ghana	167.715	4%	156.219	4%	57.360	1,5%	- 8,9%
Congo (Dem. Rep.)	145.766	4%	112.070	3%	44.482	1,1%	+ 2,6%
Saudi Arabia	159.672	4%	128.774	3%	71.812	1,8%	+ 57,7%
Vietnam	39.533	1%	67.637	2%	39.412	1,0%	+ 89,3%
Ukraine	102.729	3%	125.704	3%	44.587	1,1%	- 24,4%
Philippines	7.793	0%	6.538	0%	13.291	0,3%	+++
Congo	36.276	1%	42.993	1%	19.548	0,5%	+ 50,8%
Uzbekistan	27.742	1%	35.341	1%	11.586	0,3%	- 14,2%
Guinea	43.756	1%	47.220	1%	19.605	0,5%	- 0,2%
Other Destinations	1.352.764	35%	1.428.413	36%	598.428	15,3%	
Extra-EU	4.736.138		4.739.819		1.975.053		
% change	+ 19%		+ 0%		+ 2,8%		

EU-27 Exports of poultry meat to selected destinations

EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 44 (Millions EUR)

EU-27 Imports of poultry meat from selected origins

IMPORT

In tons of carcass weight

	2022		2023		Jan-May 24		Compared to Jan-May 23
	tonnes	%	tonnes	%	tonnes	%	
Brazil	301.239	35%	290.184	32%	118.381	30,6%	- 9,2%
Ukraine	162.837	19%	231.777	26%	95.263	24,6%	- 2,7%
United Kingdom	210.851	25%	170.513	19%	79.143	20,5%	+ 48,8%
Thailand	131.223	15%	148.602	17%	68.006	17,6%	- 3,1%
China	32.864	4%	36.467	4%	17.722	4,6%	+ 9,6%
Chile	466	0%	3.238	0%	2.431	0,6%	+++
Argentina	4.096	0%	4.086	0%	2.083	0,5%	+ 75,3%
Other Destinations	11.076	1%	10.200	1%	3.848	1,0%	
Extra-EU	854.651		895.067		386.878		
% change	+ 7%		+ 5%		+ 3,3%		

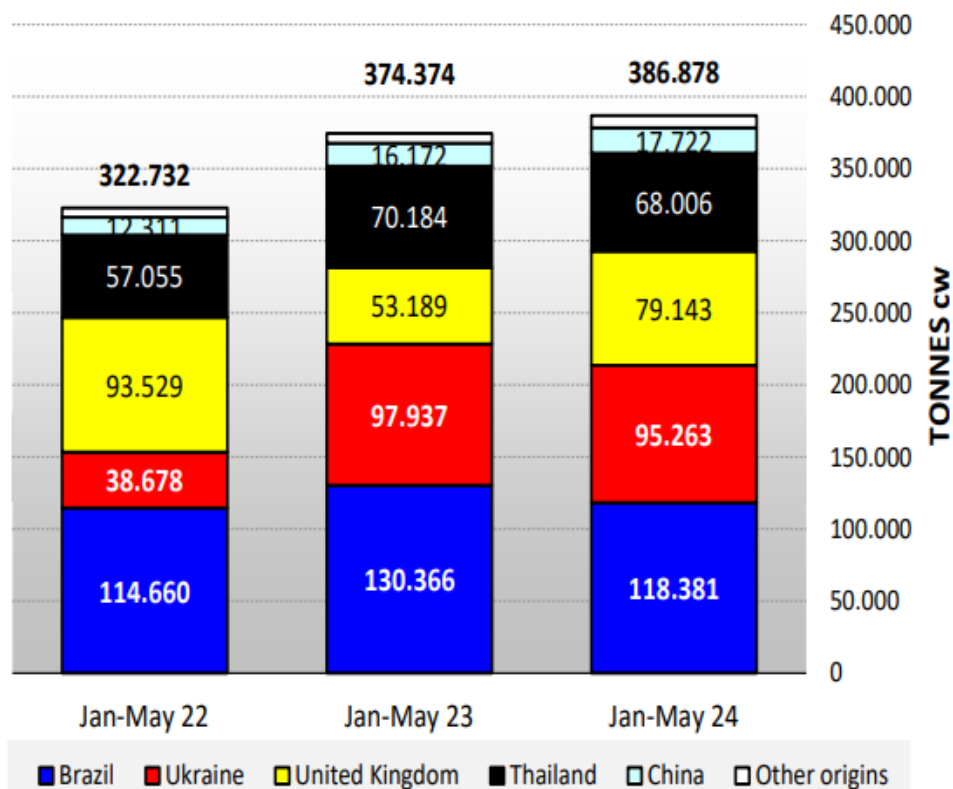
IMPORT

In 1000 euros

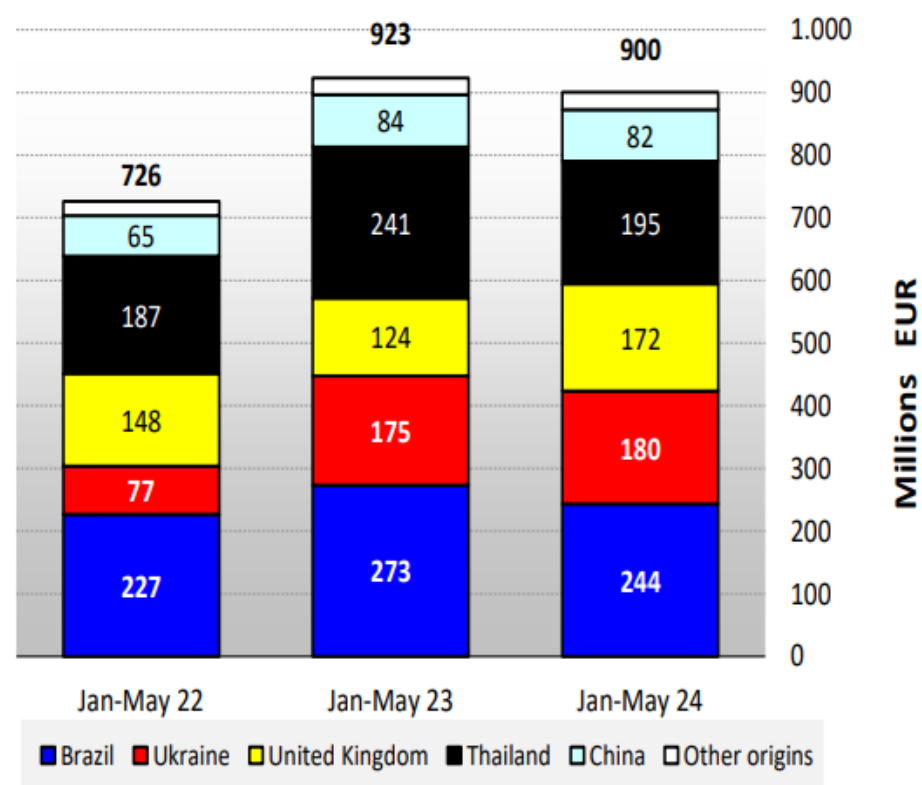
	2022		2023		Jan-May 24		Compared to Jan-May 23
	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	669.772	31%	598.053	28%	243.524	27,1%	- 10,8%
Ukraine	324.836	15%	417.899	20%	179.914	20,0%	+ 3,0%
United Kingdom	368.062	17%	353.940	17%	171.523	19,1%	+ 37,8%
Thailand	519.225	24%	489.751	23%	195.455	21,7%	- 18,8%
China	186.175	9%	182.651	9%	82.425	9,2%	- 2,0%
Chile	1.537	0%	7.325	0%	5.321	0,6%	+++
Argentina	11.463	1%	11.396	1%	4.830	0,5%	+ 27,8%
Norway	8.286	0%	8.872	0%	4.128	0,5%	+ 16,3%
Switzerland	8.975	0%	6.730	0%	2.750	0,3%	- 14,9%
Bosnia-Herz.	10.728	1%	9.362	0%	4.953	0,6%	+ 20,8%
Other Destinations	18.949	1%	19.805	1%	5.368	0,6%	
Extra-EU	2.128.008		2.105.783		900.192		
% change	+ 58%		- 1%		- 2,5%		

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

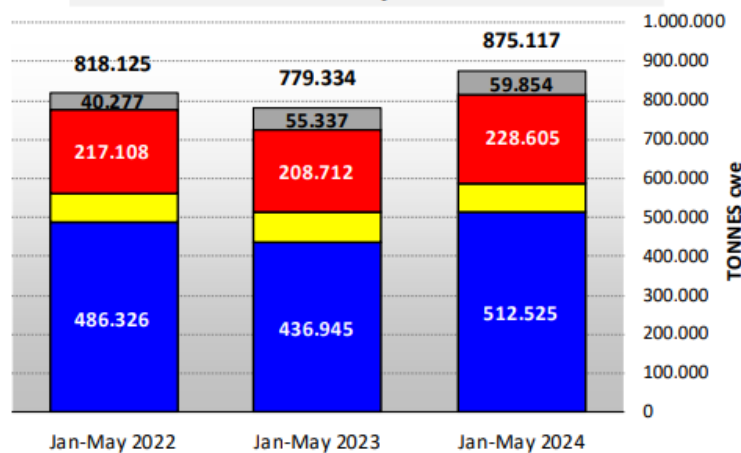


EU IMPORTS of Poultry Meat (Millions EUR)



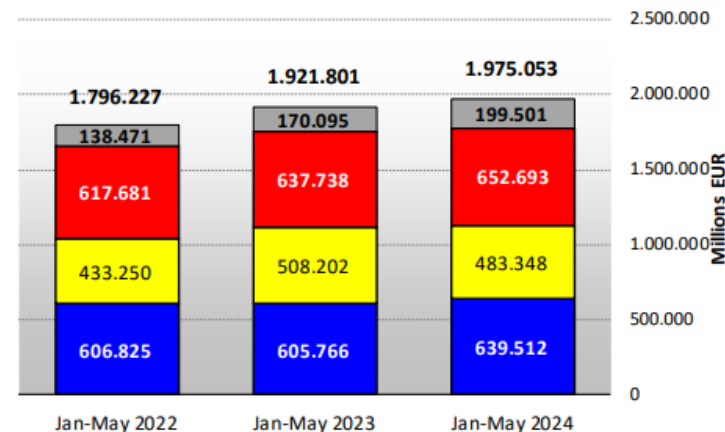
TRADE

EU EXPORTS of Poultry Meat (TONNES cwe)



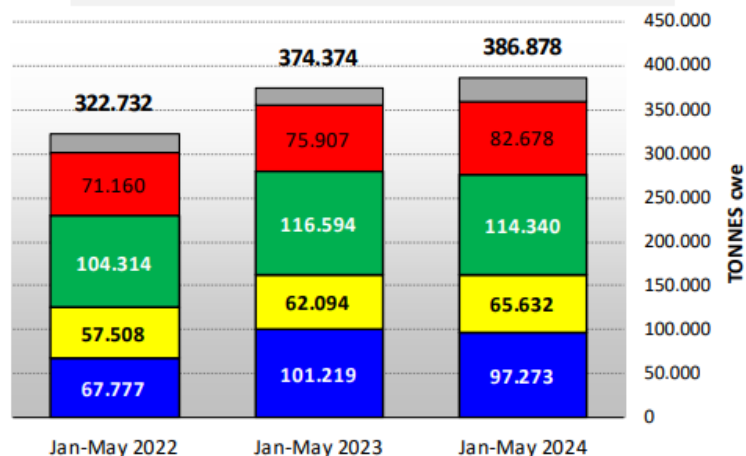
■ FROZEN ■ PREPARED ■ FRESH ■ OTHERS

EU EXPORTS of Poultry Meat (Millions EUR)



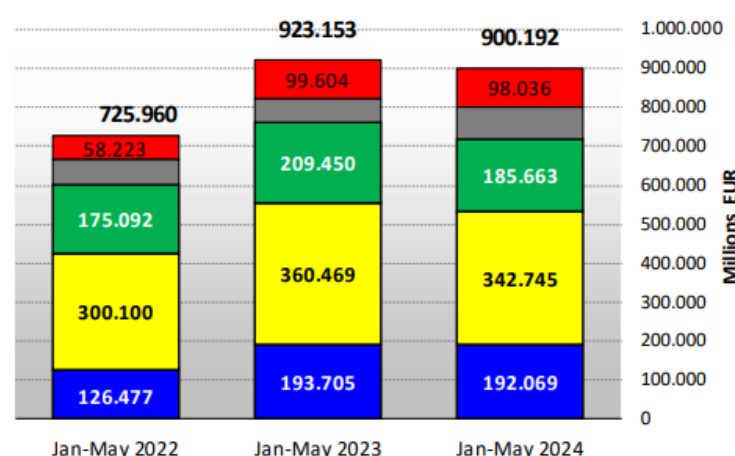
■ FROZEN ■ PREPARED ■ FRESH ■ OTHERS

EU IMPORTS of Poultry Meat (TONNES cwe)



■ FROZEN ■ PREPARED ■ SALTED ■ FRESH ■ OTHERS

EU IMPORTS of Poultry Meat (Millions EUR)



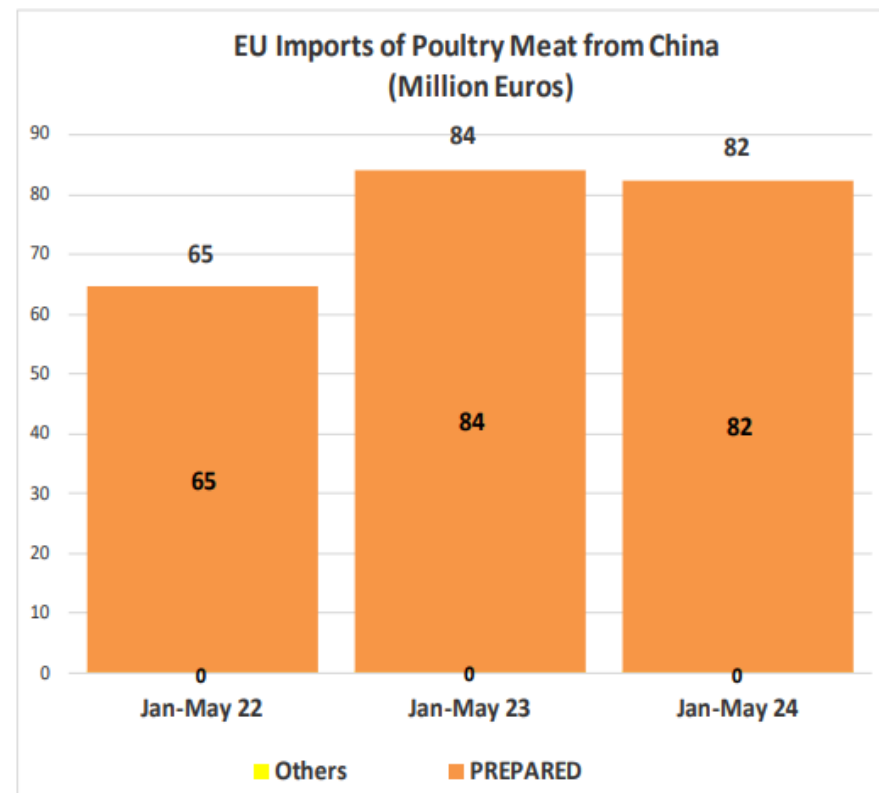
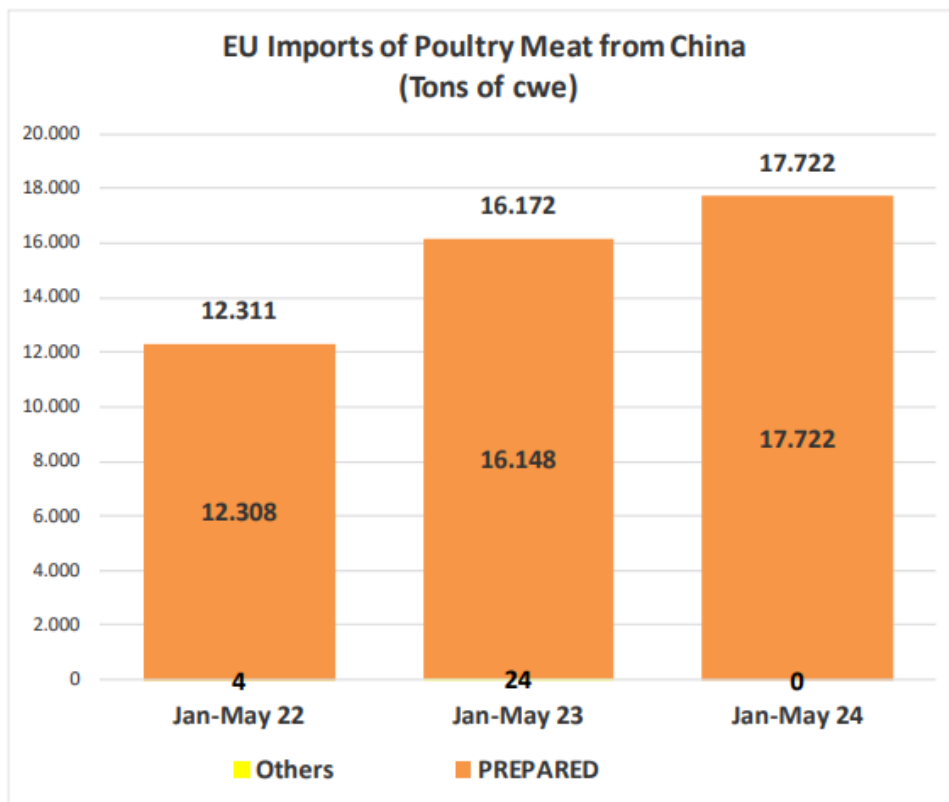
■ FROZEN ■ PREPARED ■ SALTED ■ OTHERS ■ FRESH

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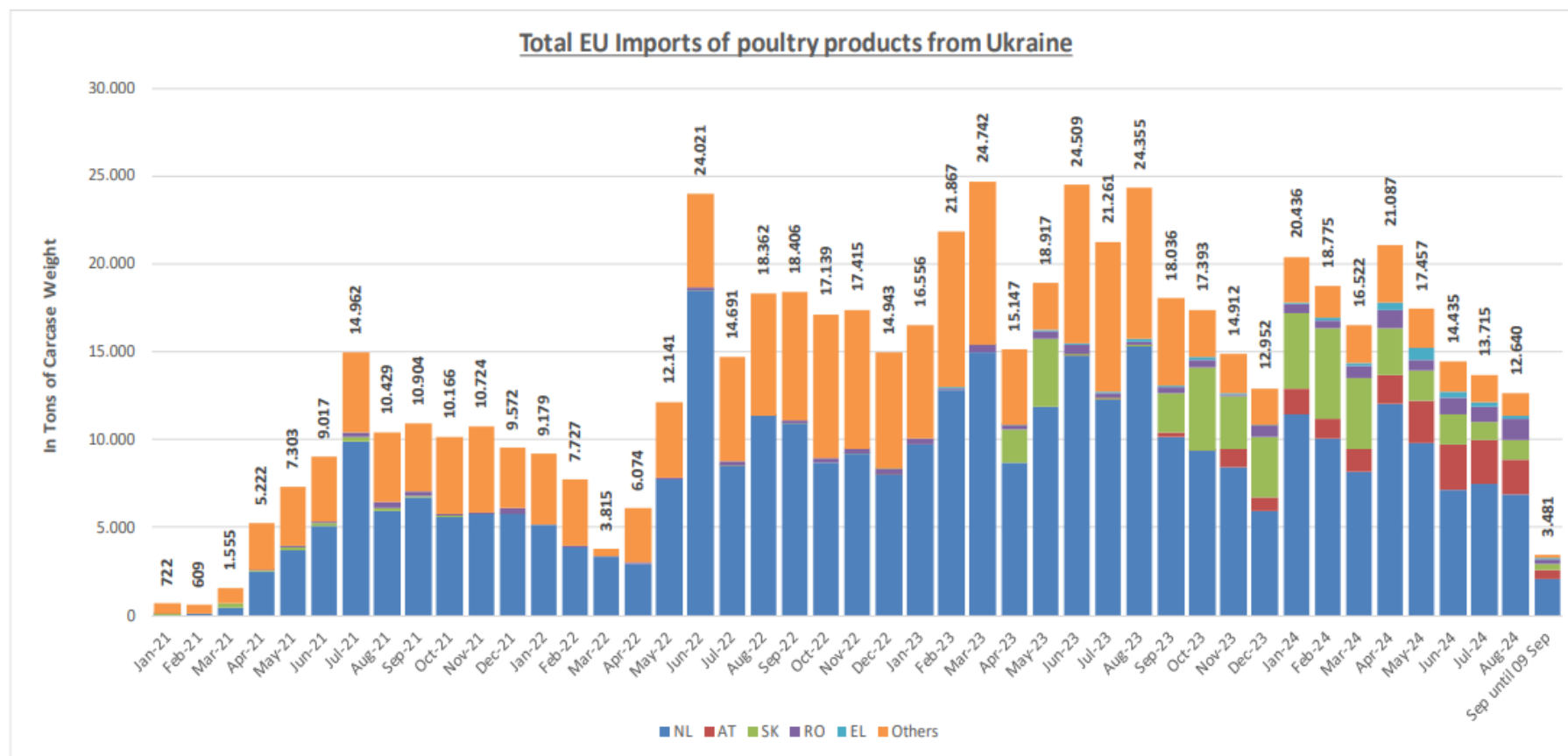
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EU-27 Imports of poultry meat from China

DG AGRI E3, source: **COMEXT**.

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EU-27 Imports of poultry meat from Ukraine



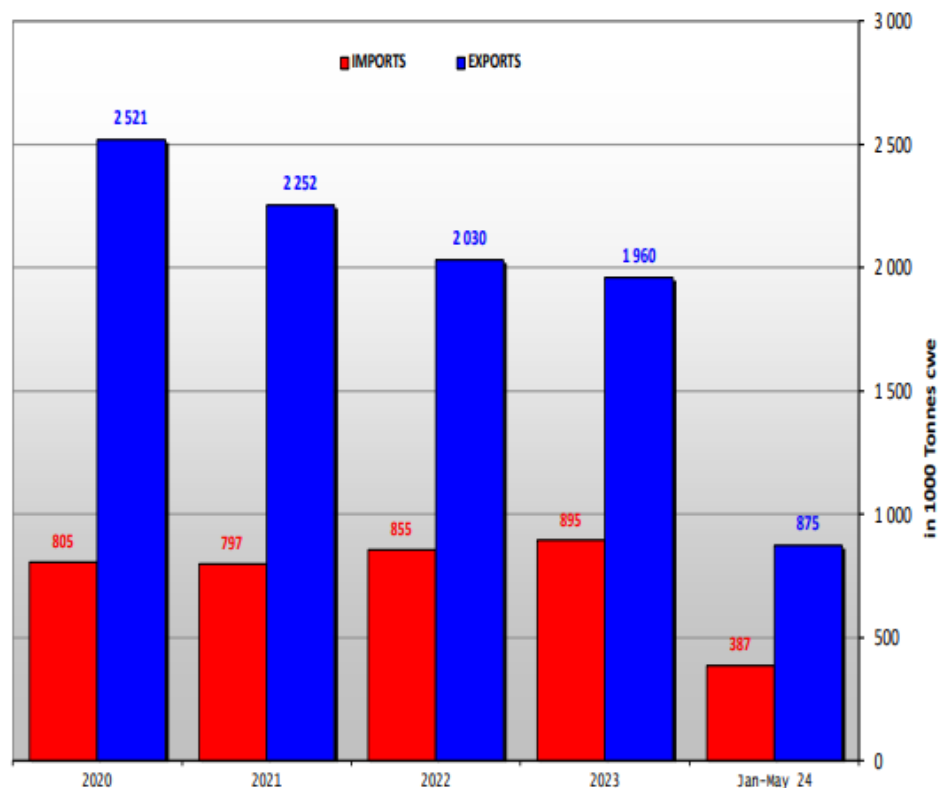
DG AGRI E3, source: **TAXUD surveillance**.

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

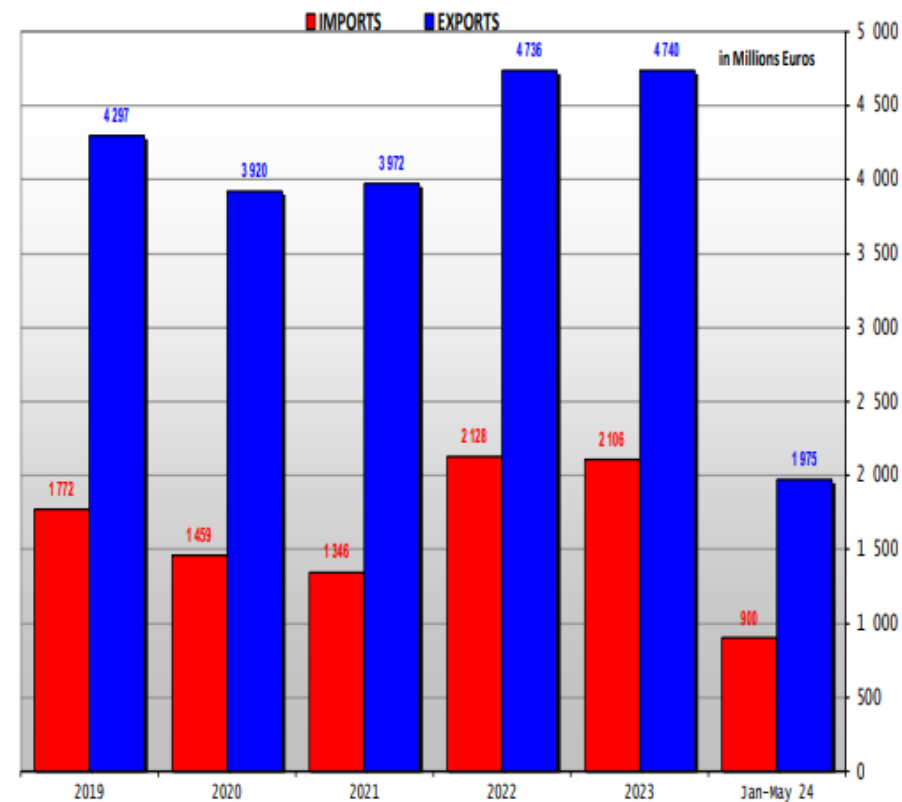
TRADE

BALANCE

in 1000 tons cwe



in million EUR



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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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