

EU Market Situation for Poultry



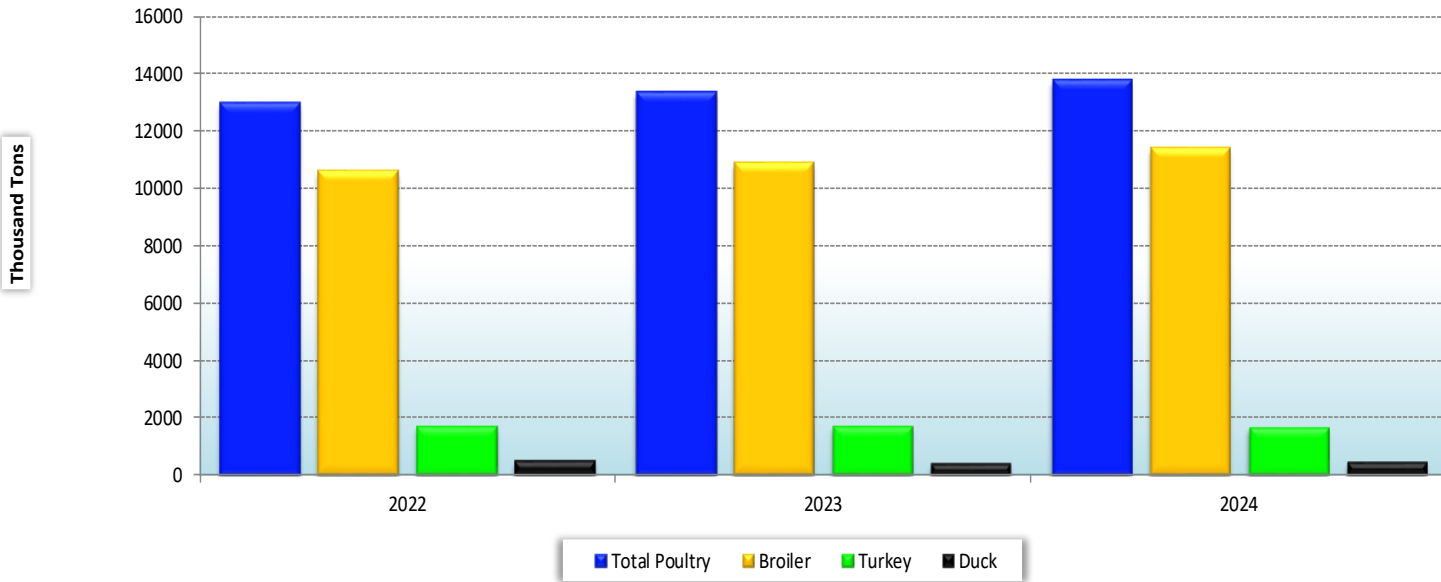
Expert Group for Agricultural Markets

18 July 2024

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT



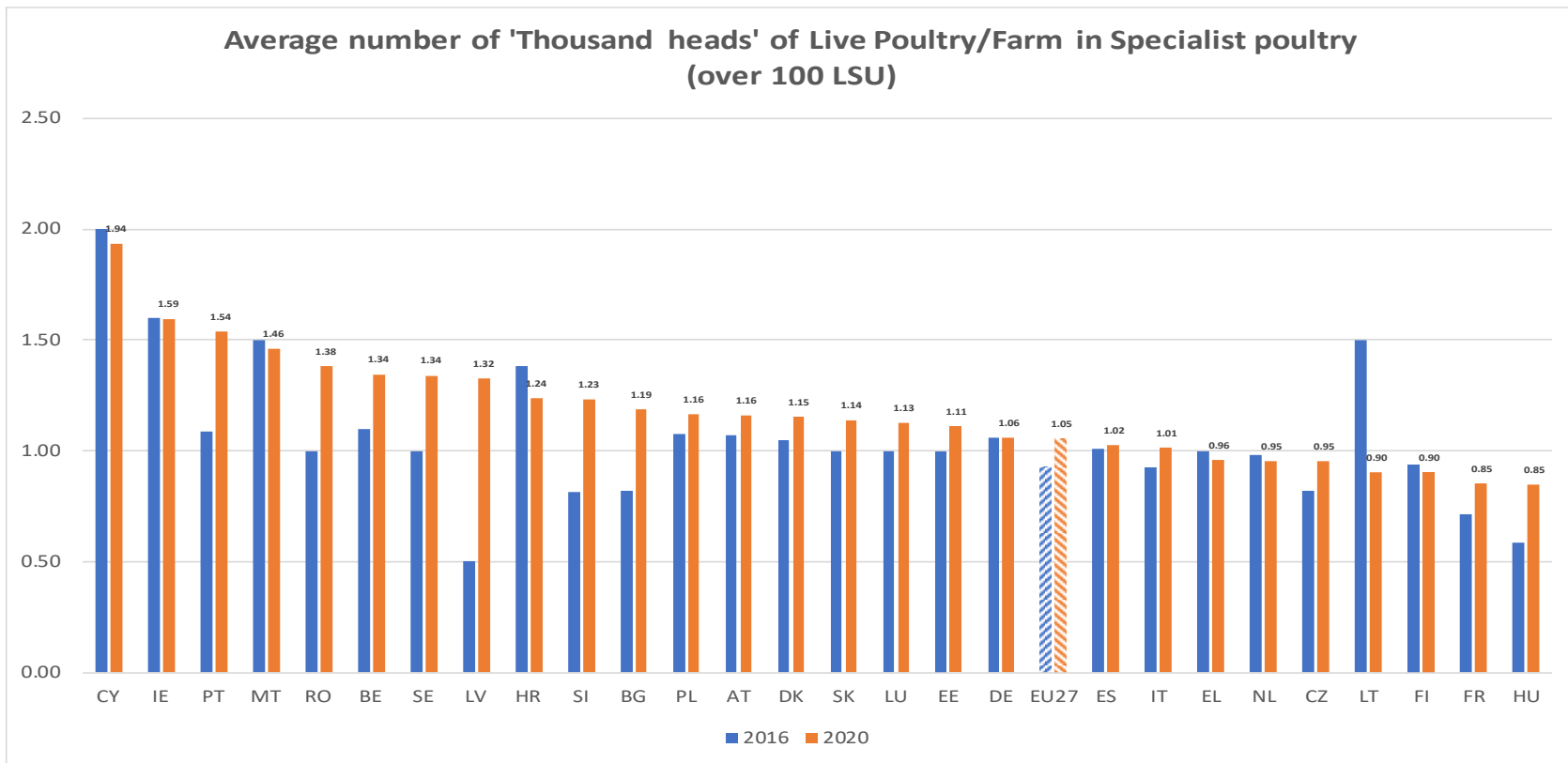
	2022	2023	2024	% 2023/2022	% 2024/2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* Source: Eurostat, forecast 2024 by MS

18 July 2024

FARM STRUCTURE SURVEY

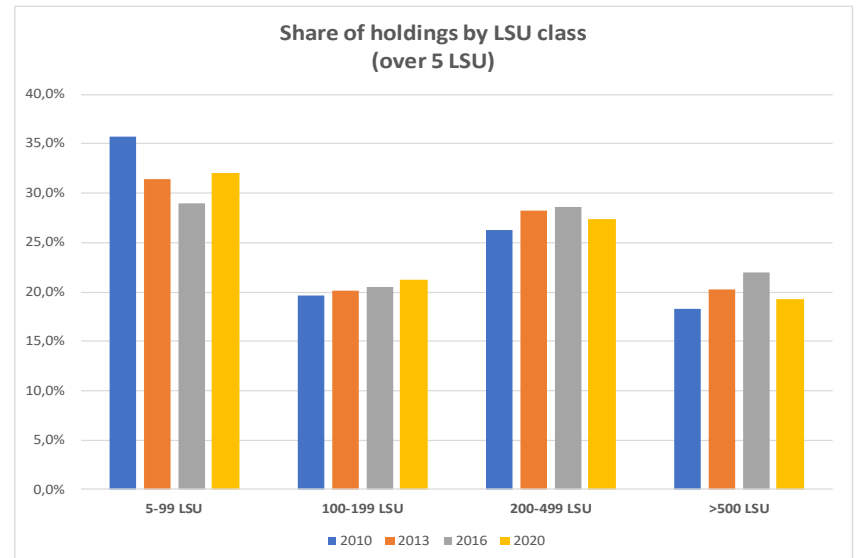
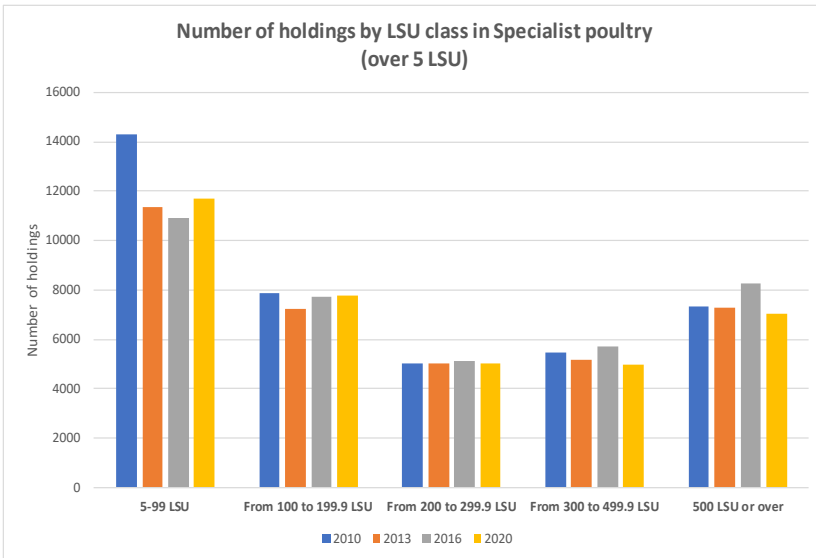
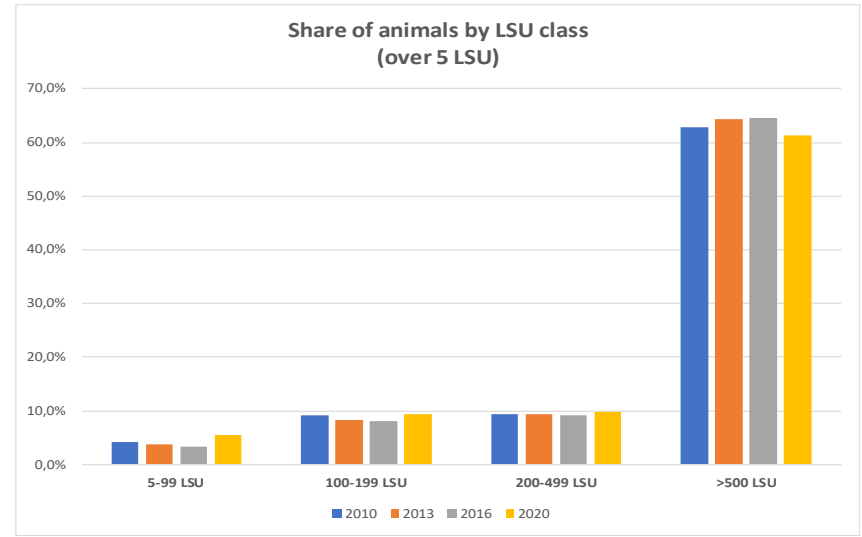
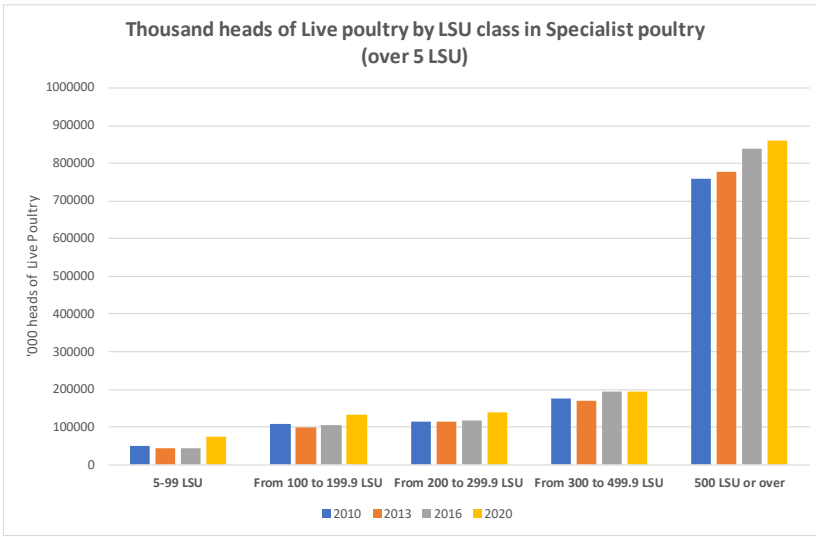
LSU for poultry:
 broiler- 0,007
 laying hen- 0,014
 turkey- 0,03
 duck- 0,01
 geese- 0,02



Specialist poultry - EU

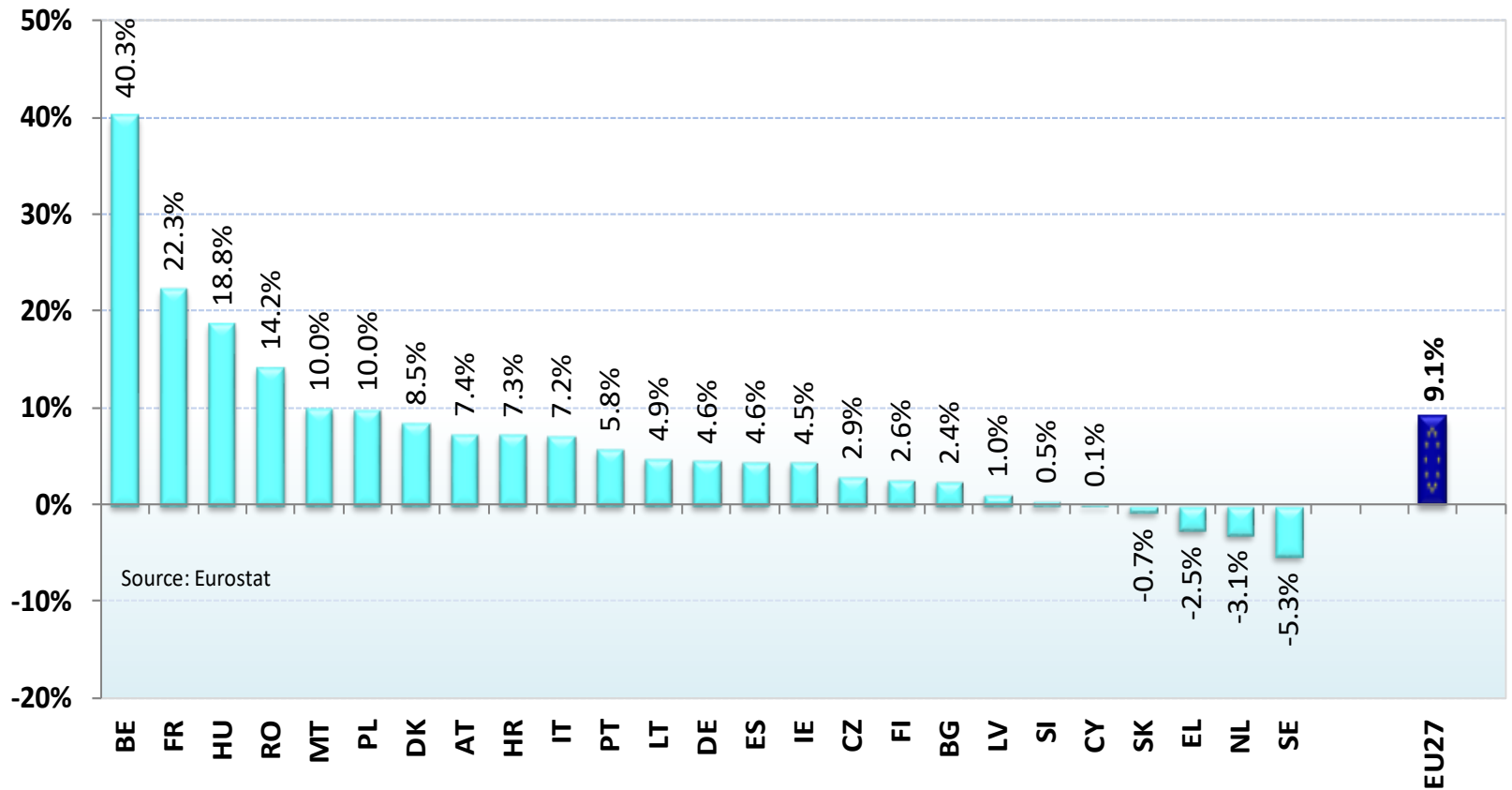
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY



PRODUCTION

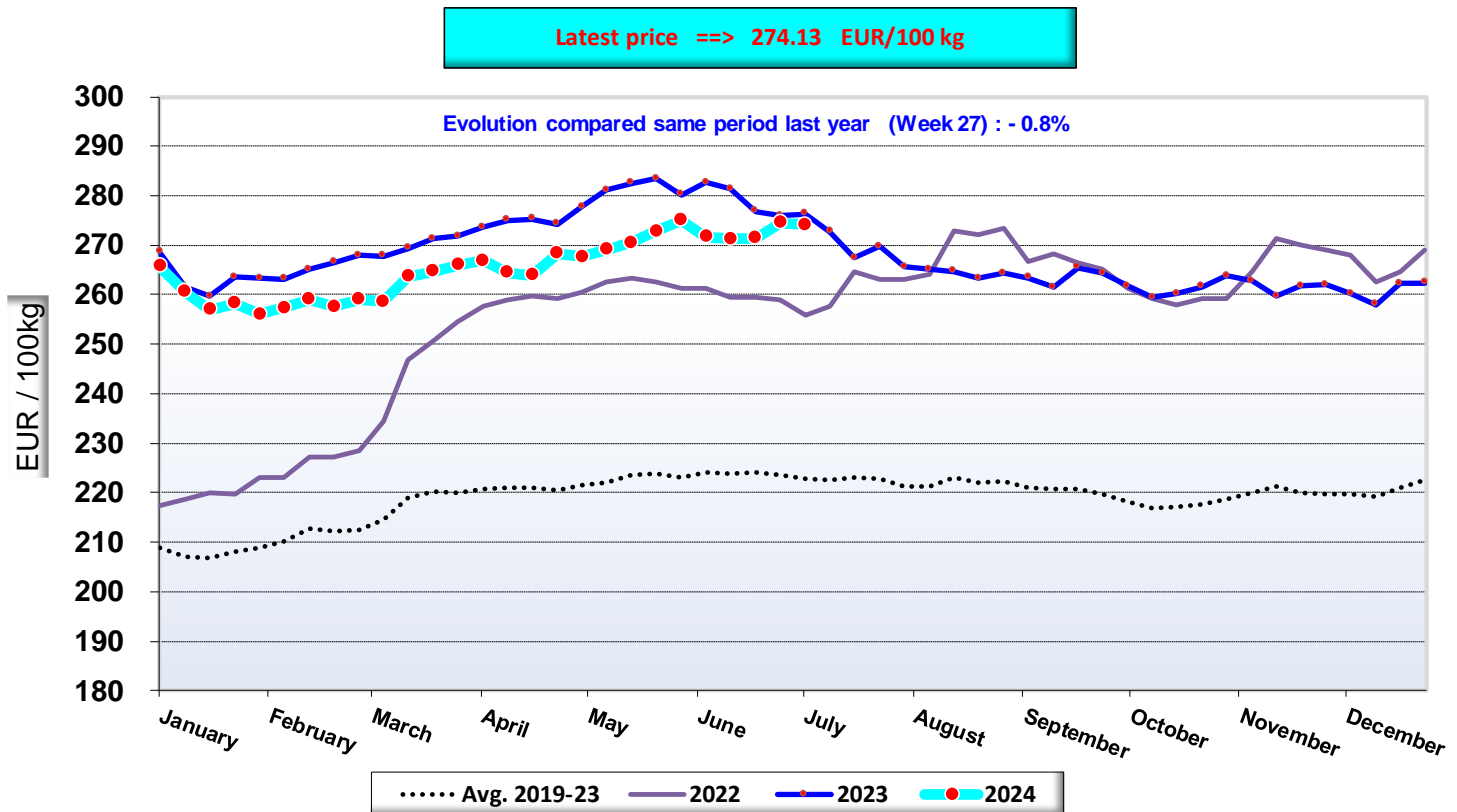
Change in Poultry Meat Production in %
2024/2023 (up to April)



Source: Eurostat

18 July 2024

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

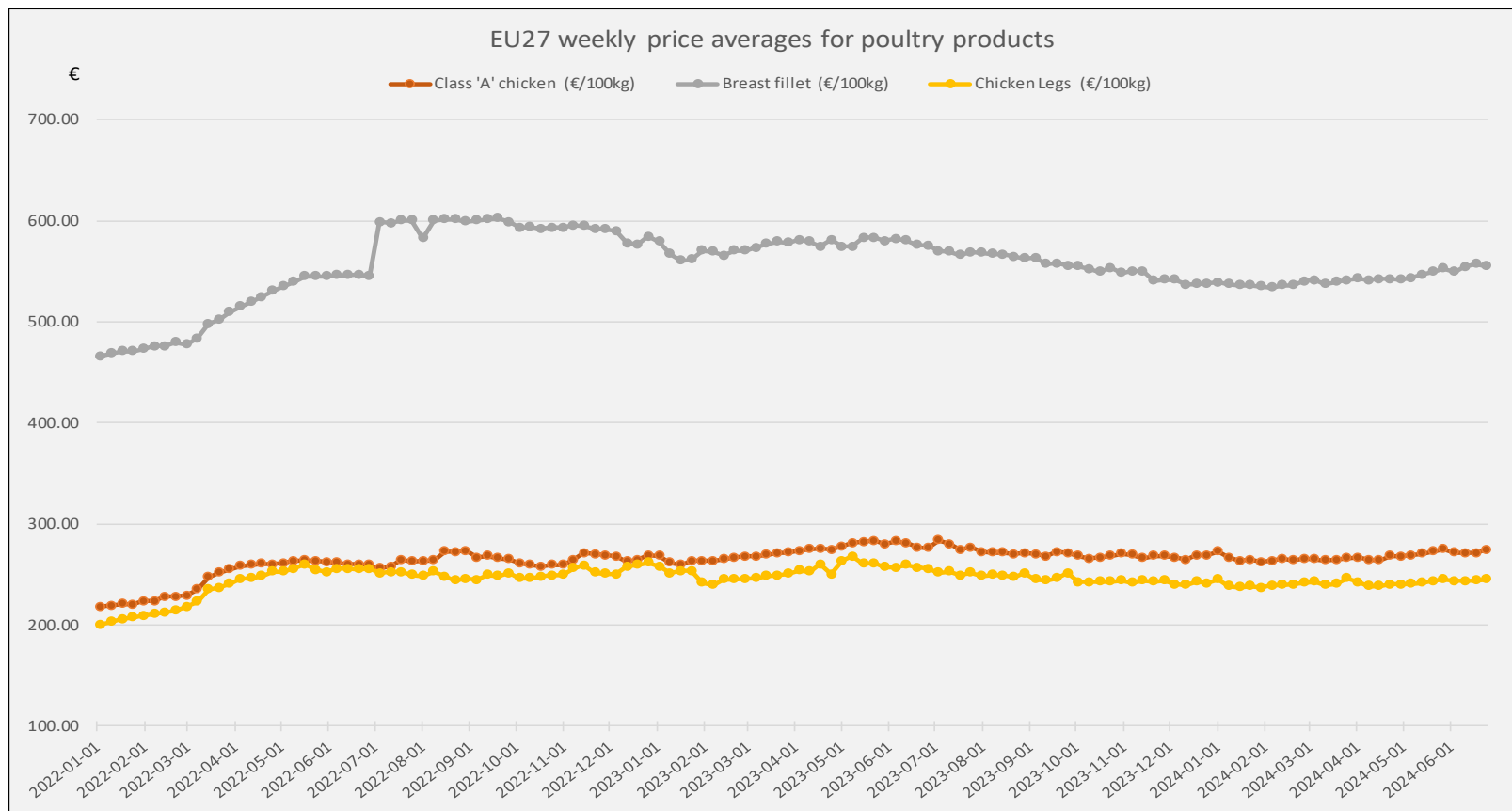


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

18 July 2024

Weekly prices of poultry products

Week - 26 EU27 weekly price averages for poultry products

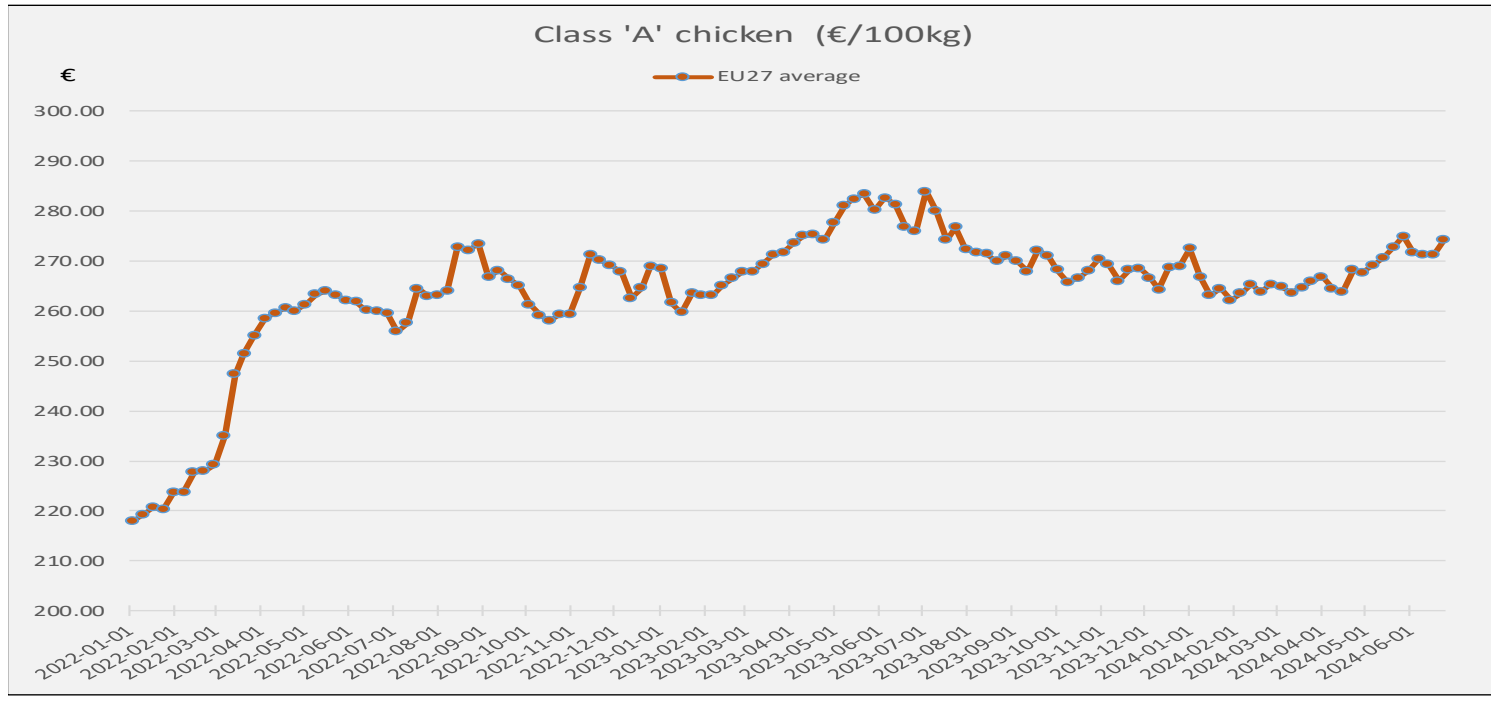


Week - 26	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	274.33	555.06	245.31

Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !
 18 July 2024

Weekly price of 'Class A Chicken'

Week - 26 Class 'A' chicken



Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	274.33	+ 1.1%	- 0.2%	- 0.6%

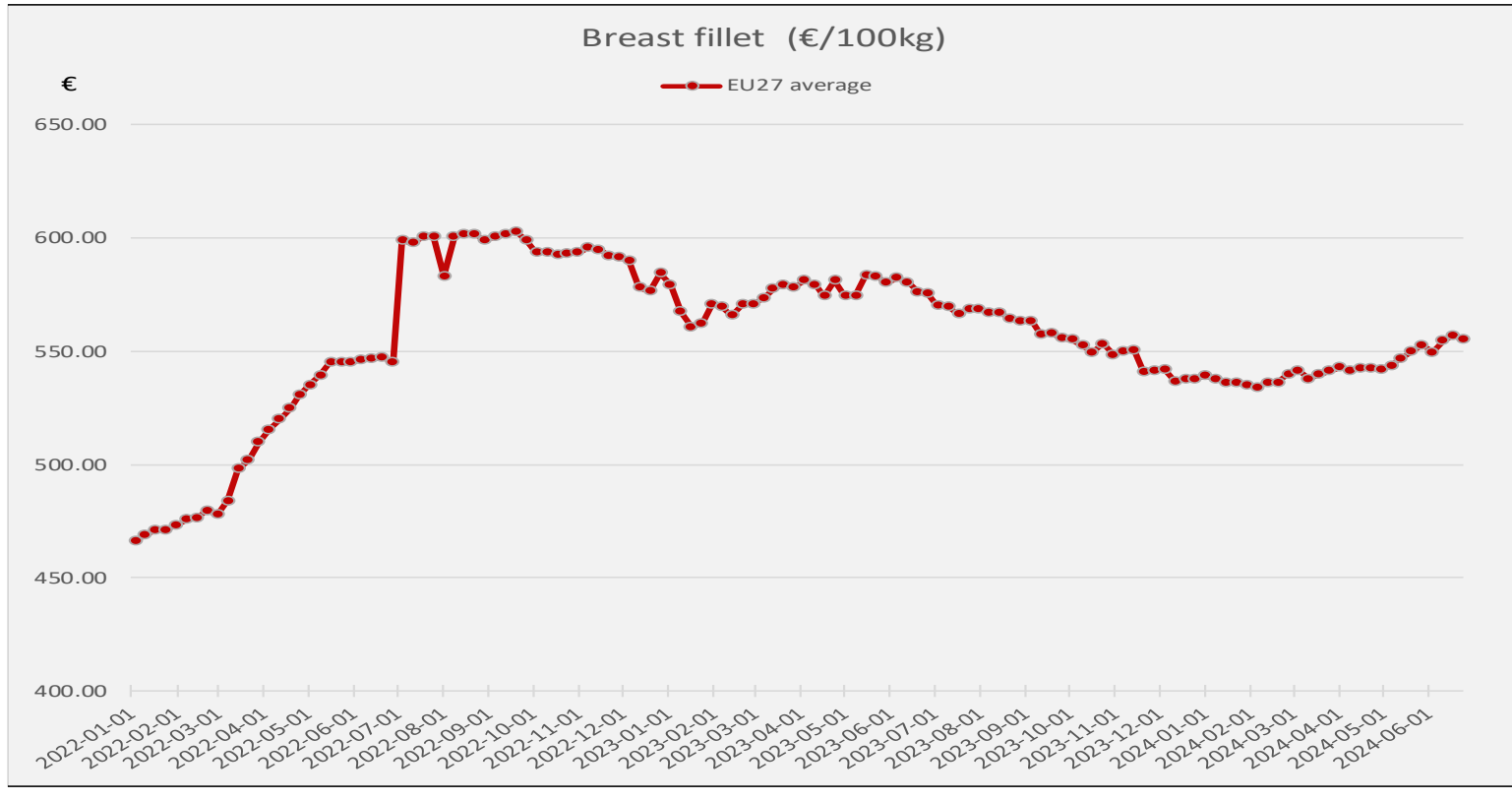
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

18 July 2024

Weekly price of 'Breast fillet'

Week - 26 Breast fillet



Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	555.06	- 0.4%	+ 0.4%	- 3.6%

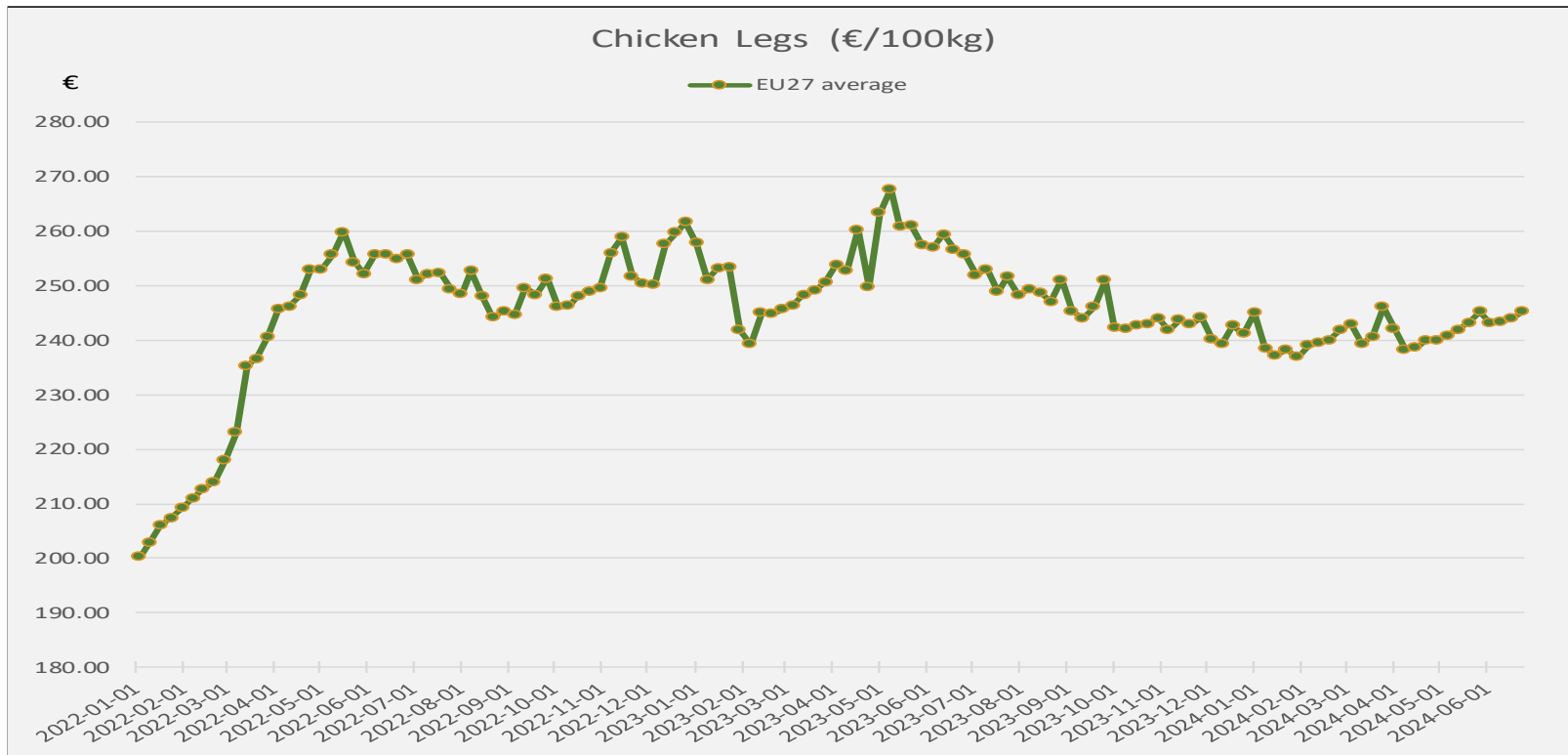
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

18 July 2024

Weekly price of 'Chicken legs'

Week - 26 Chicken Legs

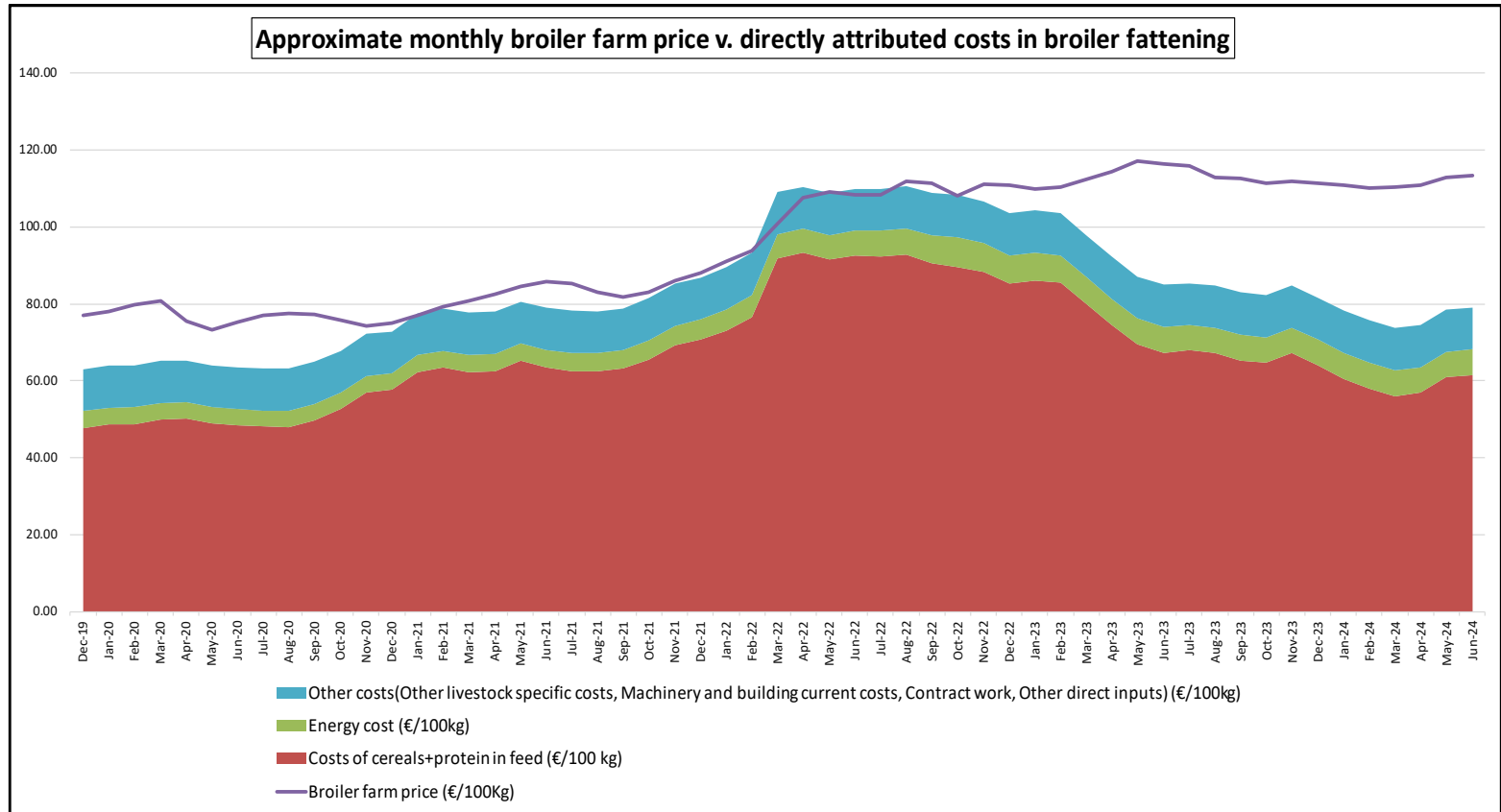


Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	245.31	+ 0.5%	+ 0.0%	- 4.1%

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

18 July 2024

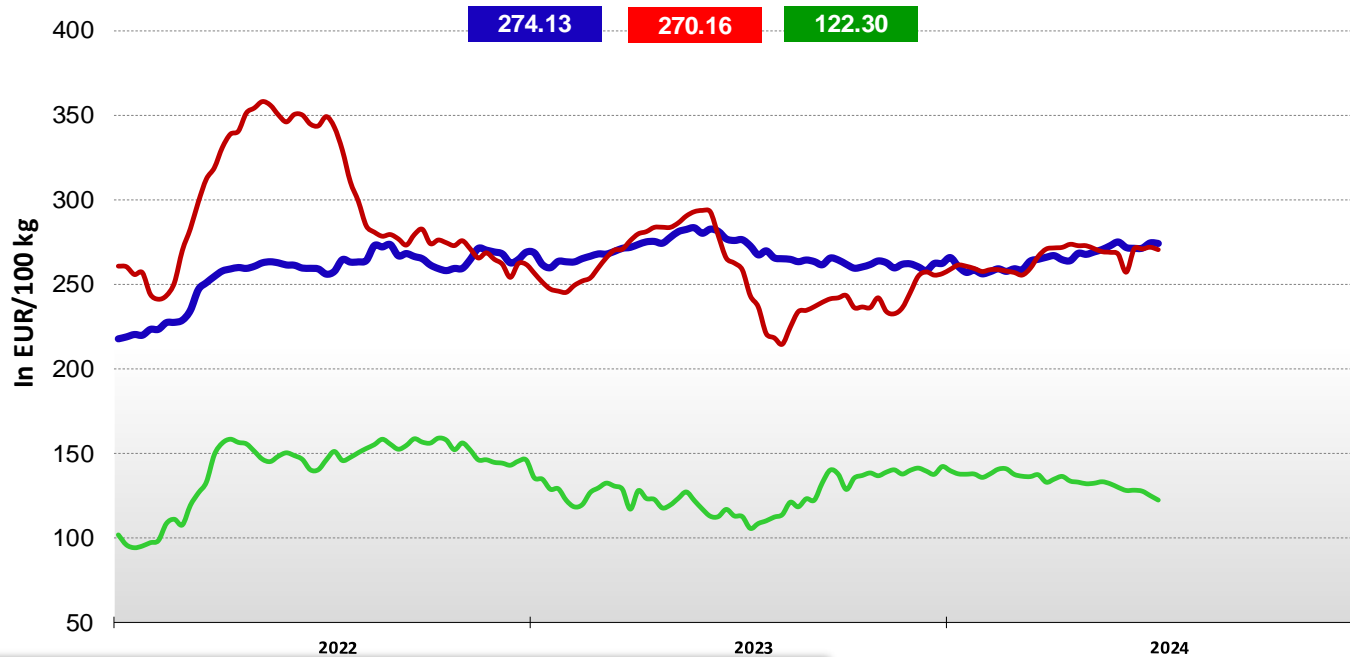
COST BROILER PRODUCTION



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 !

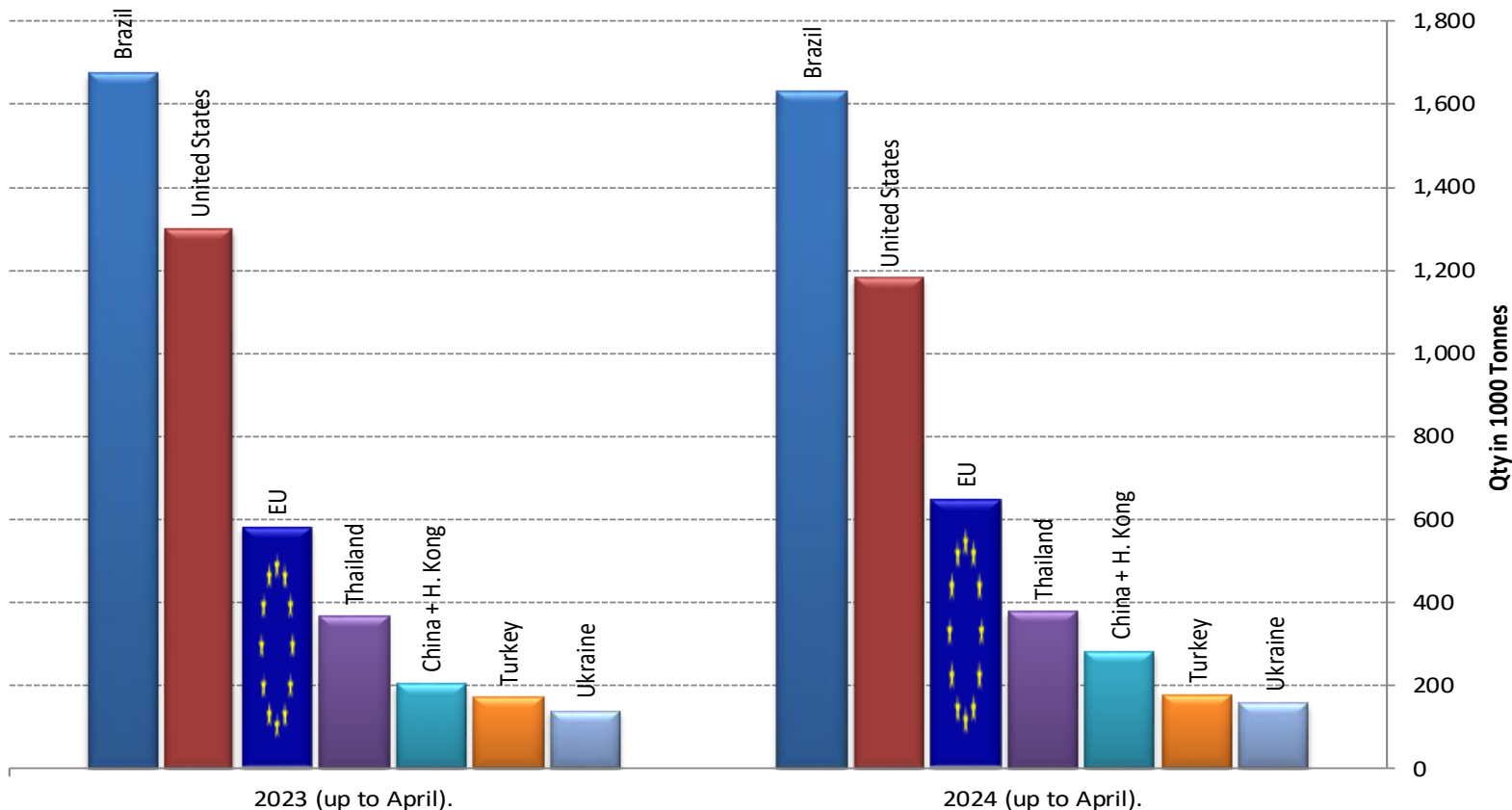
Broiler prices in EU, USA and Brazil



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

Main Exporters of POULTRY Products (up to April).

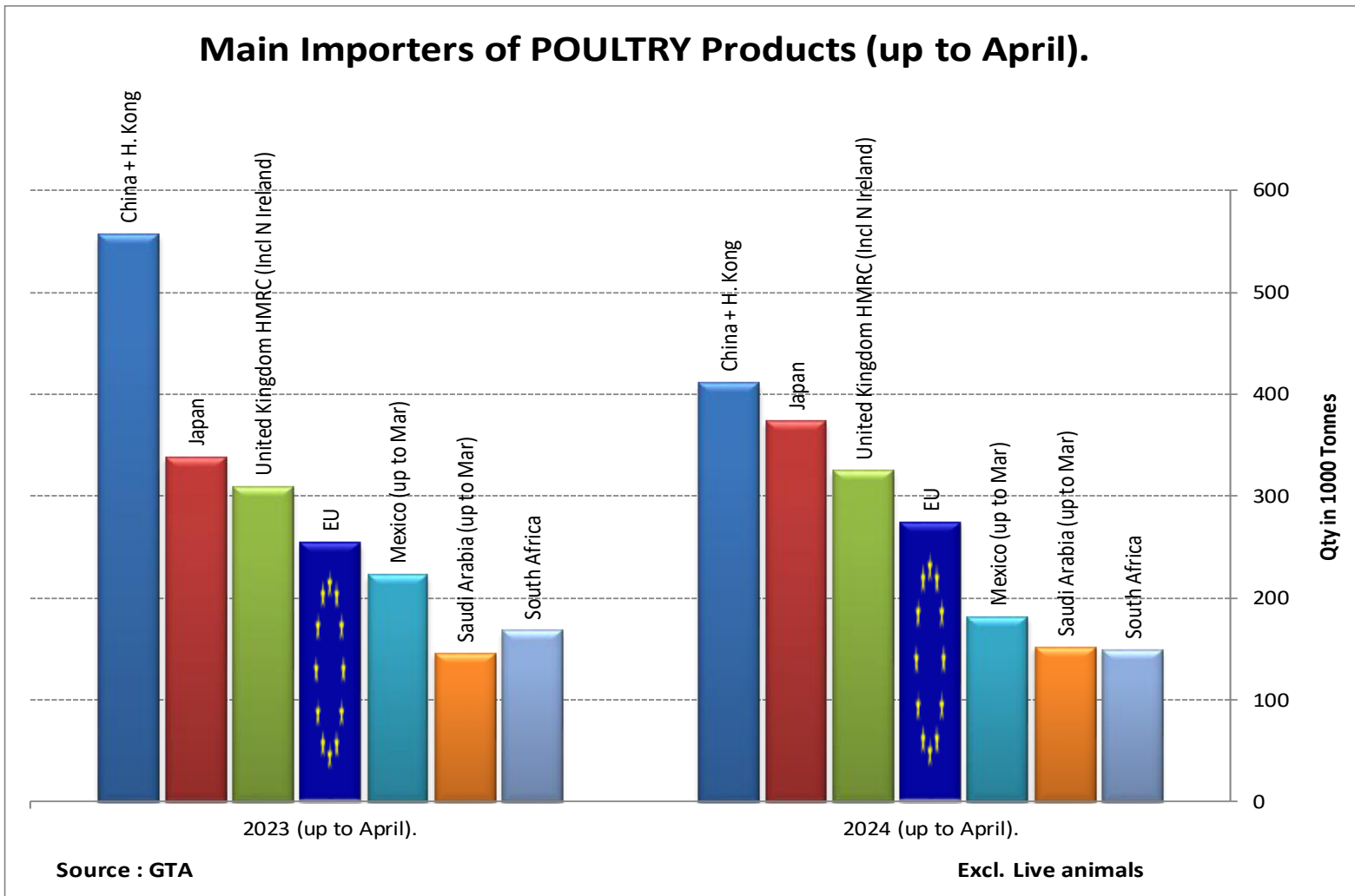


Source : GTA

Excl. Live animals

18 July 2024

Main Importers of POULTRY Products (up to April).



Source : GTA

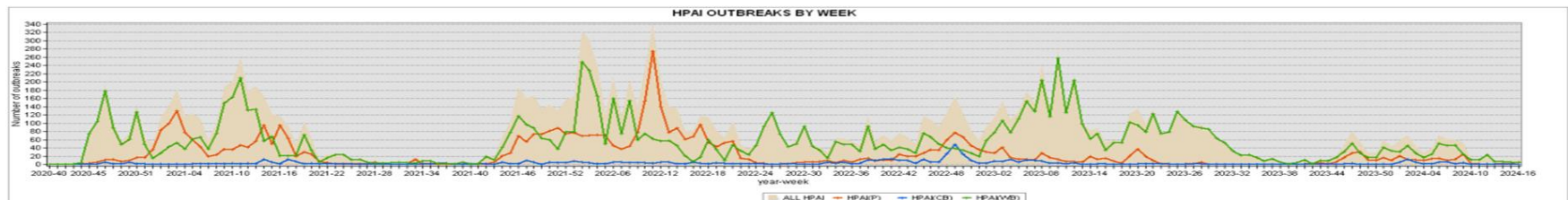
18 July 2024

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 11/07/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
BG	22	2,111,631	9.7%	29.3%
HU	84	1,750,174	37.0%	24.2%
PL	34	868,764	15.0%	12.0%
DE	30	652,244	13.2%	9.0%
FR	9	402,162	4.0%	5.6%
SK	7	295,369	3.1%	4.1%
DK	13	264,437	5.7%	3.7%
CZ	5	208,805	2.2%	2.9%
IT	6	187,647	2.6%	2.6%
NL	3	156,943	1.3%	2.2%
BE	4	103,394	1.8%	1.4%
HR	2	83,851	0.9%	1.2%
RO	4	73,759	1.8%	1.0%
SE	3	52,629	1.3%	0.7%
LT	1	6,361	0.4%	0.1%
Grand Total	227	7,218,170	100.0%	100.0%

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	14	1,064,860	6.2%	14.8%
Laying hen	28	1,470,826	12.3%	20.4%
Duck	48	1,127,954	21.1%	15.6%
Turkey	71	1,639,152	31.3%	22.7%
Goose	24	131,616	10.6%	1.8%
Guinea fowl	1	17,256	0.4%	0.2%
Pheasant	2	9,785	0.9%	0.1%
Mixed	9	35,115	4.0%	0.5%
No information	30	1,721,606	13.2%	23.9%
Grand Total	227	7,218,170	100.0%	100.0%



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

EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

	2020		2021		2022		2023		Jan-Apr 24		Compared to Jan-Apr 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811,675	32%	725,611	32%	732,508	36%	719,637	37%	242,848	35.2%	+ 2.9%
Ghana	213,838	8%	228,066	10%	156,456	8%	148,745	8%	45,015	6.5%	- 8.4%
Congo (Dem. Rep.)	101,987	4%	139,852	6%	125,421	6%	101,032	5%	35,427	5.1%	+ 47.8%
Vietnam	50,977	2%	31,784	1%	29,751	1%	54,214	3%	26,507	3.8%	+ 118.0%
Saudi Arabia	74,407	3%	58,457	3%	74,590	4%	66,759	3%	25,596	3.7%	+ 18.6%
Ukraine	145,871	6%	162,267	7%	105,810	5%	84,641	4%	21,842	3.2%	- 26.5%
Congo	28,551	1%	30,303	1%	35,562	2%	46,994	2%	18,588	2.7%	+ 83.5%
Philippines	195,884	8%	81,155	4%	6,421	0%	4,270	0%	16,676	2.4%	+++
Uzbekistan	15,520	1%	32,390	1%	34,474	2%	44,821	2%	13,109	1.9%	- 2.2%
Switzerland	30,592	1%	33,390	1%	33,784	2%	34,794	2%	12,826	1.9%	+ 15.6%
<i>Other Destinations</i>	851,449	34%	729,098	32%	695,457	34%	654,248	33%	231,401	33.5%	
Extra-EU	2,520,753		2,252,374		2,030,235		1,960,155		689,835		
% change			- 11%		- 10%		- 3%		+ 12.2%		

18 July 2024

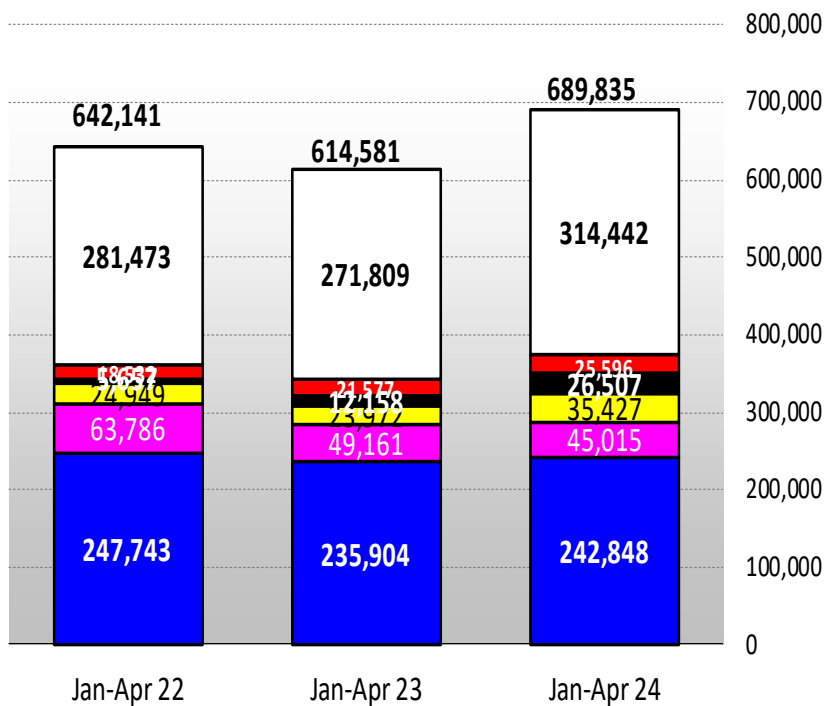
EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan-Apr 24		Compared to Jan-Apr 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	1,981,927	51%	2,009,674	51%	2,652,394	68%	2,588,910	66%	837,844	21.4%	- 2.2%
Ghana	172,363	4%	224,103	6%	167,715	4%	156,219	4%	45,005	1.1%	- 13.2%
Congo (Dem. Rep.)	81,033	2%	116,553	3%	145,766	4%	112,070	3%	36,265	0.9%	+ 20.2%
Vietnam	55,251	1%	35,592	1%	39,533	1%	67,637	2%	31,159	0.8%	+ 109.4%
Saudi Arabia	104,518	3%	93,283	2%	159,672	4%	128,774	3%	53,212	1.4%	+ 37.2%
Ukraine	100,109	3%	119,533	3%	102,729	3%	125,704	3%	37,775	1.0%	- 24.2%
Congo	23,311	1%	26,636	1%	36,276	1%	42,993	1%	16,086	0.4%	+ 68.2%
Philippines	86,502	2%	57,220	1%	7,793	0%	6,538	0%	9,341	0.2%	+++
Uzbekistan	14,952	0%	23,945	1%	27,742	1%	35,341	1%	8,032	0.2%	- 25.4%
Switzerland	162,550	4%	179,202	5%	210,024	5%	221,548	6%	74,213	1.9%	+ 5.7%
<i>Other Destinations</i>	<i>1,137,540</i>	<i>29%</i>	<i>1,086,614</i>	<i>28%</i>	<i>1,186,496</i>	<i>30%</i>	<i>1,254,131</i>	<i>32%</i>	<i>418,294</i>	<i>10.7%</i>	
Extra-EU	3,920,057		3,972,355		4,736,138		4,739,865		1,567,226		
% change			+ 1%		+ 19%		+ 0%		+ 3.4%		

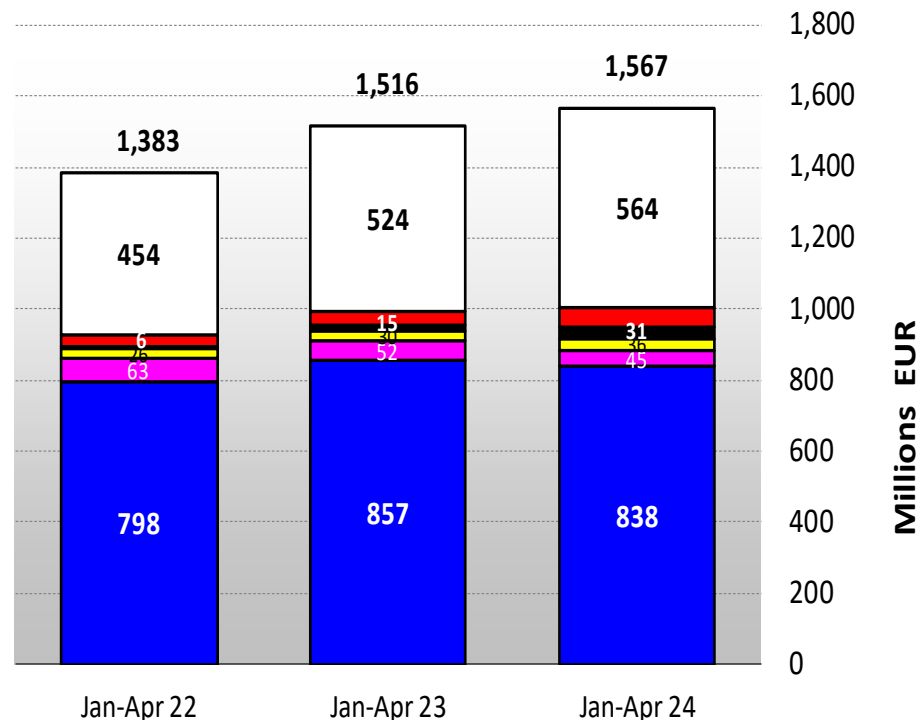
18 July 2024

EU-27 poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 36 ('Millions EUR)

18 July 2024

EU-27 Imports of poultry meat from selected origins

In tons of carcass weight

	2020		2021		2022		2023		Jan-Apr 24		Compared to Jan-Apr 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227,738	28%	251,887	32%	301,239	35%	290,184	32%	93,658	30.6%	- 6.0%
Ukraine	108,669	14%	102,892	13%	162,837	19%	231,777	26%	76,810	25.1%	- 2.5%
United Kingdom	293,914	37%	274,667	34%	210,851	25%	170,513	19%	62,810	20.5%	+ 57.6%
Thailand	131,374	16%	130,658	16%	131,223	15%	148,602	17%	52,776	17.3%	+ 1.1%
China	17,017	2%	20,916	3%	32,864	4%	36,467	4%	13,318	4.4%	+ 7.9%
Chile	14,382	2%	2,441	0%	466	0%	3,238	0%	1,984	0.6%	+++
Argentina	3,273	0%	3,151	0%	4,096	0%	4,086	0%	1,567	0.5%	+ 52.3%
Other Destinations	8,404	1%	10,445	1%	11,076	1%	10,200	1%	2,813	0.9%	
Extra-EU	804,772		797,056		854,651		895,067		305,735		
% change			- 1%		+ 7%		+ 5%		+ 6.1%		

18 July 2024

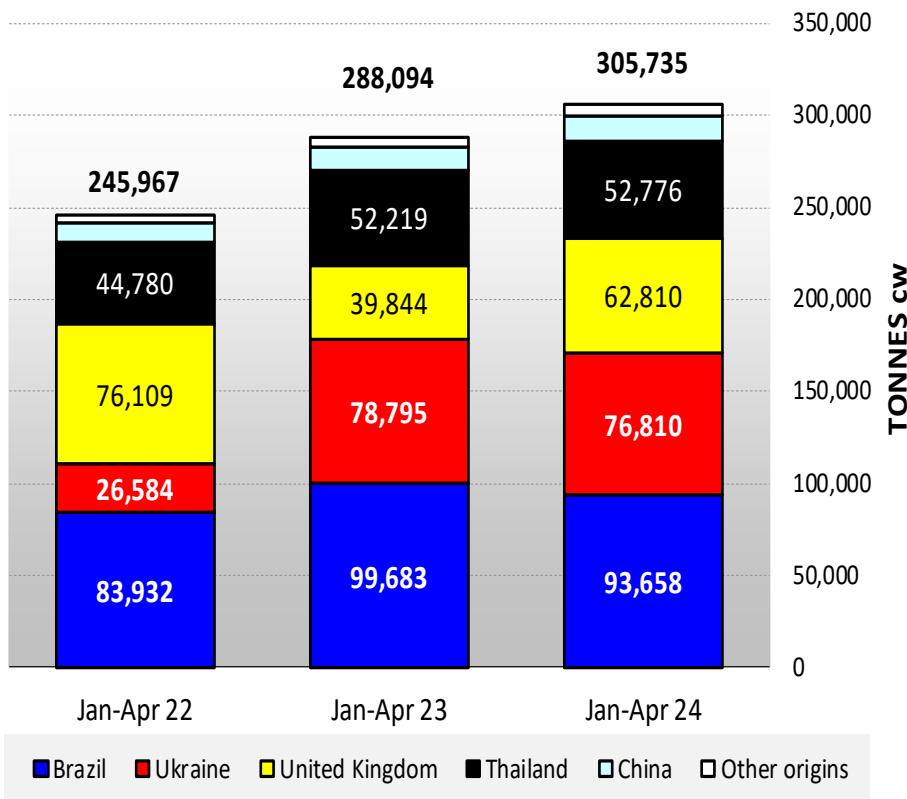
EU-27 Imports of poultry meat from selected origins

	2020		2021		2022		2023		Jan-Apr 24		Compared to Jan-Apr 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351,277	24%	388,472	29%	669,772	31%	598,053	28%	187,060	26.7%	- 9.3%
Ukraine	132,740	9%	166,208	12%	324,836	15%	417,899	20%	143,057	20.4%	+ 3.4%
United Kingdom	501,768	34%	327,273	24%	368,062	17%	353,940	17%	132,564	18.9%	+ 44.4%
Thailand	316,860	22%	317,487	24%	519,225	24%	489,751	23%	155,788	22.2%	- 17.3%
China	78,298	5%	95,081	7%	186,175	9%	182,651	9%	62,055	8.8%	- 4.3%
Chile	35,557	2%	6,019	0%	1,537	0%	7,325	0%	4,314	0.6%	+ 80.0%
Argentina	6,515	0%	6,508	0%	11,463	1%	11,396	1%	3,708	0.5%	+ 22.1%
Norway	5,280	0%	7,914	1%	8,286	0%	8,872	0%	3,142	0.4%	+ 9.5%
Switzerland	6,229	0%	5,300	0%	8,975	0%	6,730	0%	1,990	0.3%	- 13.1%
Bosnia-Herz.	7,809	1%	10,345	1%	10,728	1%	9,362	0%	3,294	0.5%	+ 18.4%
<i>Other Destinations</i>	16,429	1%	15,466	1%	18,949	1%	19,805	1%	4,532	0.6%	
Extra-EU	1,458,760		1,346,074		2,128,008		2,105,783		701,505		
% change			- 8%		+ 58%		- 1%		- 1.3%		

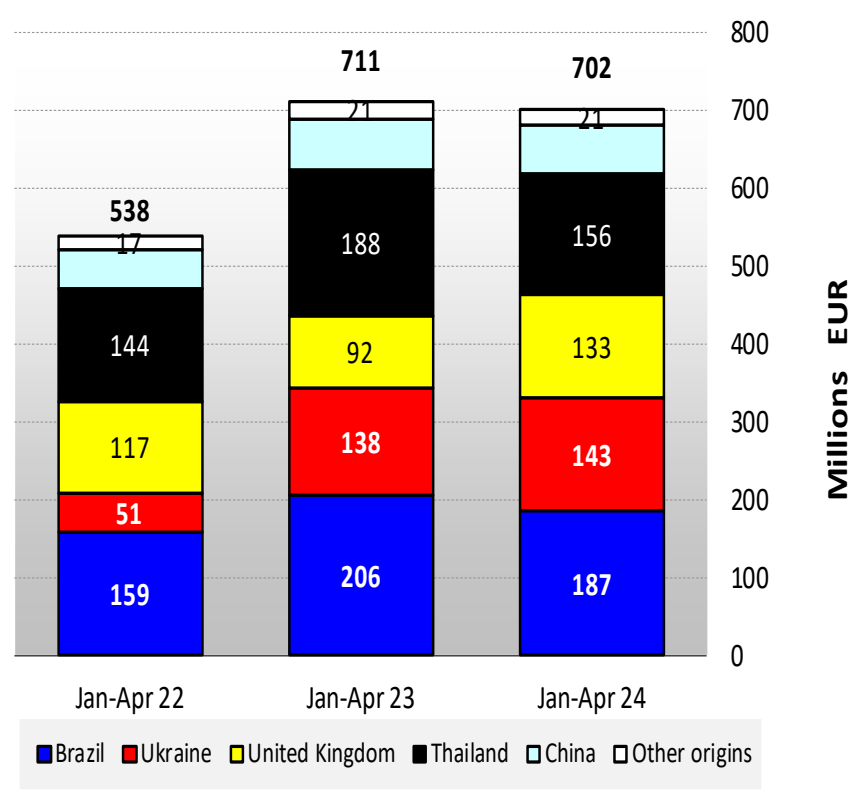
18 July 2024

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

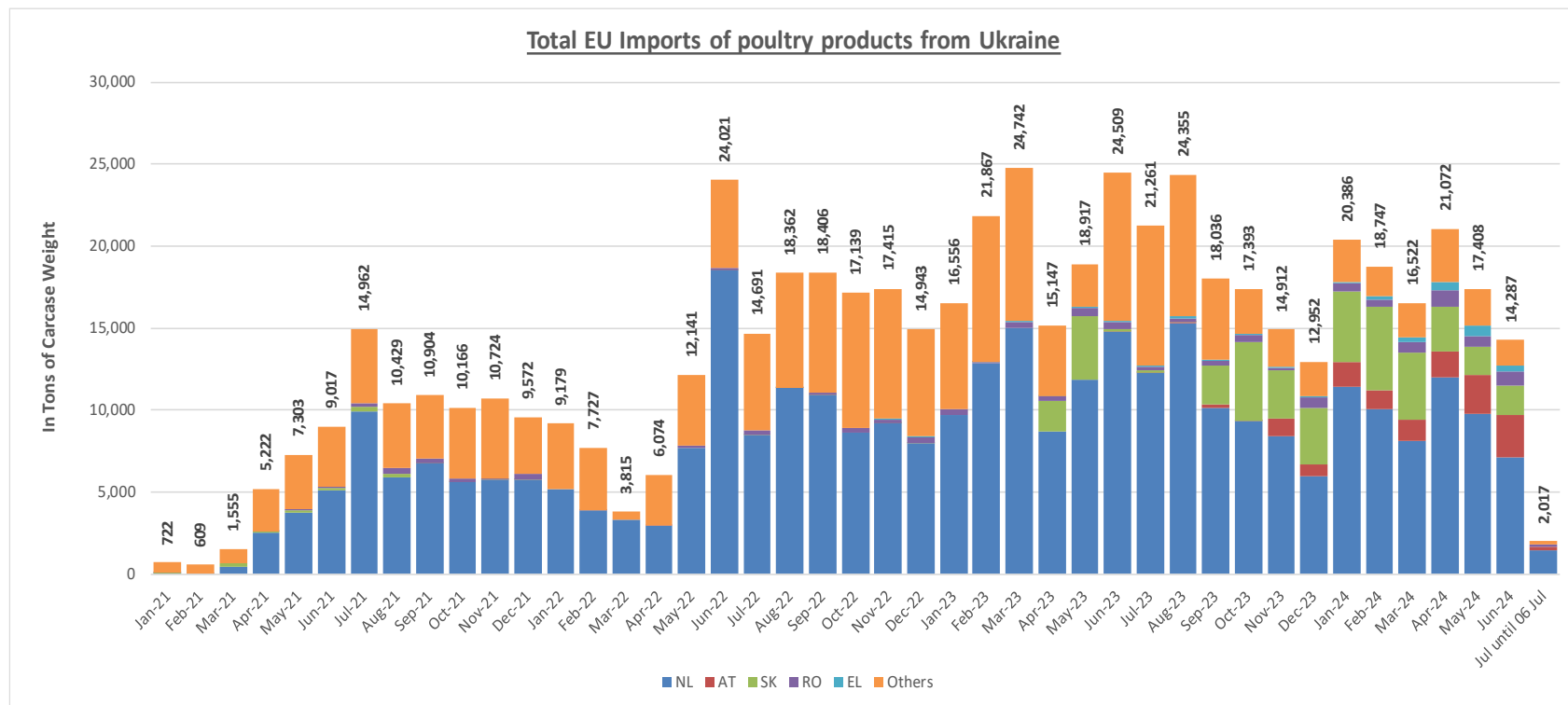


EU IMPORTS of Poultry Meat (Millions EUR)



18 July 2024

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.

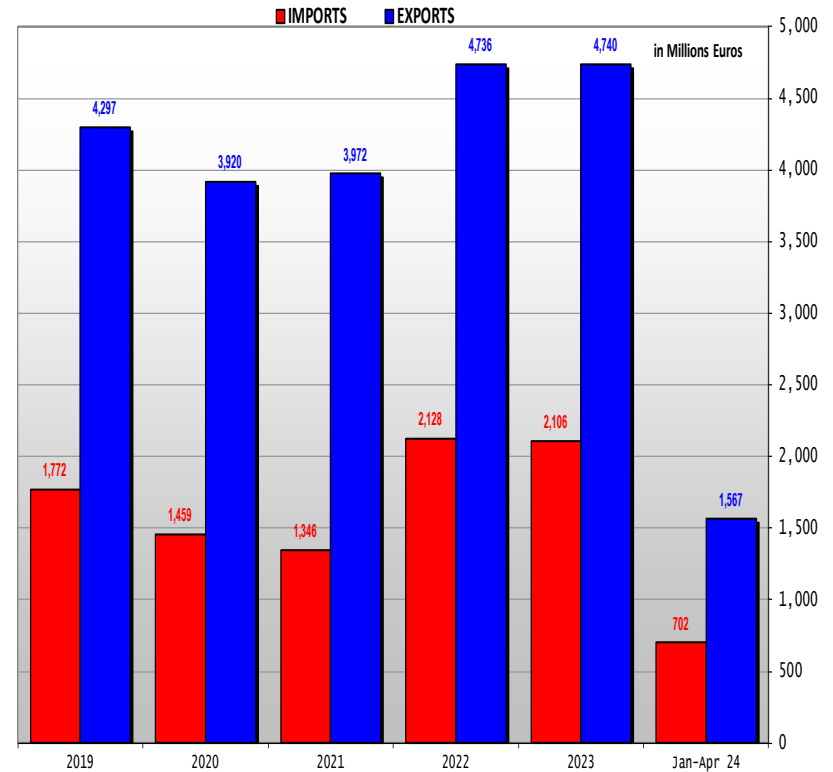
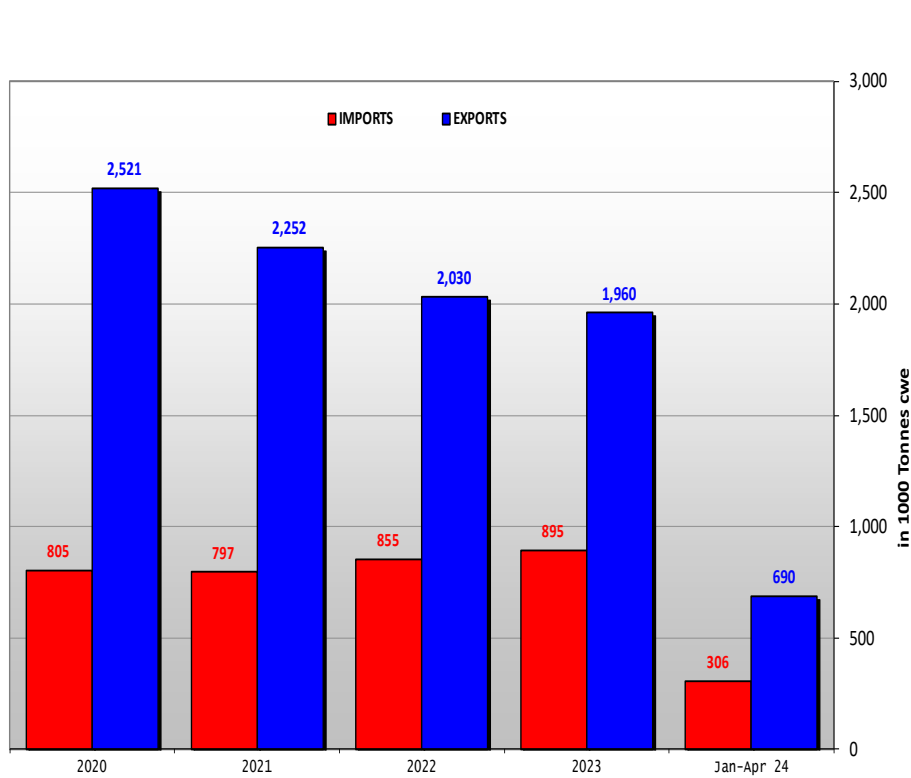
18 July 2024

TRADE

BALANCE

in 1000 tons cwe

in million EUR



18 July 2024

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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18 July 2024