

EU Market Situation for Poultry



Expert Group for Agricultural Markets

22 February 2024

FORECAST

Missing or incomplete data for BE BG EE EL HR LV LT MT SK SE

No expert for EE LU LV MT

EU production of poultry (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	3,053,870	3,114,770	3,155,230	2.0	1.3
DE	1,647,500	1,655,100	1,668,900	0.5	0.8
FR	1,576,471	1,607,958	1,637,640	2.0	1.8
ES	1,465,993	1,543,924	1,546,997	5.3	0.2
IT	1,218,000	1,342,000	1,354,000	10.2	0.9
NL	1,297,000	1,297,000	1,297,000	0.0	0.0
HU	655,100	699,062	741,060	6.7	6.0
RO	455,000	460,000	470,000	1.1	2.2
BE	441,250	448,300	448,300	1.6	0.0
PT	362,700	373,600	379,600	3.0	1.6
EL	296,500	296,500	296,500	0.0	0.0
SE	187,000	192,000	192,000	2.7	0.0
CZ	201,500	200,500	180,000	0.5	-0.2
DK	156,700	158,900	162,500	1.4	2.3
AT	151,810	151,810	151,810	0.0	0.0
IE	228,000	143,000	150,500	-37.3	5.2
FI	147,100	145,200	149,300	1.3	2.8
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	75,060	77,040	78,300	2.6	1.6
HR	61,270	61,270	61,270	0.0	0.0
CY	27,150	27,790	28,100	2.4	1.1
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	14,107,974	14,397,224	14,550,507	2.1	1.1

FORECAST

EU production of broiler (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	2,539,950	2,603,450	2,643,540	2.5	1.5
ES	1,264,836	1,322,781	1,330,550	4.6	0.6
DE	1,295,800	1,300,000	1,310,000	0.3	0.8
FR	1,182,100	1,202,900	1,222,300	1.8	1.6
NL	1,223,000	1,223,000	1,223,000	0.0	0.0
IT	992,000	1,056,000	1,068,000	6.5	1.1
HU	464,610	495,800	516,260	6.7	4.1
RO	435,000	440,000	450,000	1.1	2.3
BE	435,060	441,500	441,500	1.5	0.0
PT	308,100	317,300	322,100	3.0	1.5
EL	282,400	282,400	282,400	0.0	0.0
SE	182,000	187,000	187,000	2.7	0.0
CZ	180,000	180,000	160,000	0.0	-11.1
DK	151,500	154,700	158,000	2.1	2.1
FI	138,300	136,500	141,000	-1.3	3.3
IE	190,000	126,000	130,000	-33.7	3.2
LT	130,000	130,000	130,000	0.0	0.0
AT	128,400	128,400	128,400	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	69,550	71,590	73,000	2.9	2.0
HR	61,270	61,270	61,270	0.0	0.0
CY	27,000	27,700	28,000	2.6	1.1
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	11,915,056	12,121,471	12,239,500	1.7	1.0

EU production of turkey (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
PL	425,110	416,990	415,750	-1.9	-0.3
DE	323,800	326,300	330,000	0.8	1.1
IT	219,000	277,000	277,000	26.5	0.0
FR	252,000	246,400	242,200	-2.2	-1.7
ES	197,857	217,643	212,947	10.0	-2.2
HU	102,960	97,400	101,500	-5.4	4.2
PT	45,700	44,300	45,000	-3.1	1.6
NL	44,000	44,000	44,000	0.0	0.0
AT	21,560	21,560	21,560	0.0	0.0
RO	20,000	20,000	20,000	0.0	0.0
HR	18,000	18,000	18,000	0.0	0.0
EL	14,100	14,100	14,100	0.0	0.0
IE	32,500	11,000	14,000	-66.2	27.3
CZ	10,500	10,000	10,000	-4.8	0.0
FI	8,800	8,700	8,300	-1.1	-4.6
BE	6,190	6,800	6,800	9.9	0.0
LT	5,500	5,500	5,500	0.0	0.0
SI	5,510	5,450	5,300	-1.1	-2.8
SE	5,000	5,000	5,000	0.0	0.0
DK	5,100	4,200	4,500	-17.6	7.1
SK	3,000	3,000	3,000	0.0	0.0
CY	150	90	100	-40.0	11.1
BG					
LV					
EE					
MT					
EU27	1,766,437	1,803,533	1,804,657	2.1	0.1

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FORECAST

EU production of duck (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
FR	118,300	133,600	148,300	12.9	11.0
HU	70,350	84,780	101,700	20.5	20.0
PL	64,600	68,860	69,900	6.6	1.5
NL	30,000	30,000	30,000	0.0	0.0
DE	24,200	25,000	25,000	3.3	0.0
BG	22,000	21,500	21,500	-2.3	0.0
PT	8,900	12,000	12,500	34.8	4.2
CZ	11,000	10,500	10,000	-4.5	-4.8
IE	5,500	6,000	6,500	9.1	8.3
ES	3,300	3,500	3,500	6.1	0.0
IT	3,000	4,000	4,000	33.3	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	363,665	402,255	435,415	10.6	8.2

EU production of rabbit (expert forecast Spring 2024)

Source : Experts WG

Qty in Tonnes

% change

	2022	2023	2024	%2023/2022	%2024/2023
ES	40,930	38,840	38,000	-5.1	-2.2
IT	26,000	24,000	23,000	-7.7	-4.2
FR	23,640	21,500	19,900	-9.1	-7.4
CZ	9,000	9,000	9,000	0.0	0.0
PL	10,000	9,000	8,000	-10.0	-11.1
EL	5,000	5,000	5,000	0.0	0.0
PT	3,800	3,700	3,700	-2.6	0.0
SK	3,600	3,600	3,600	0.0	0.0
CY	530	550	550	3.8	0.0
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	122,742	115,422	110,982	-6.0	-3.8

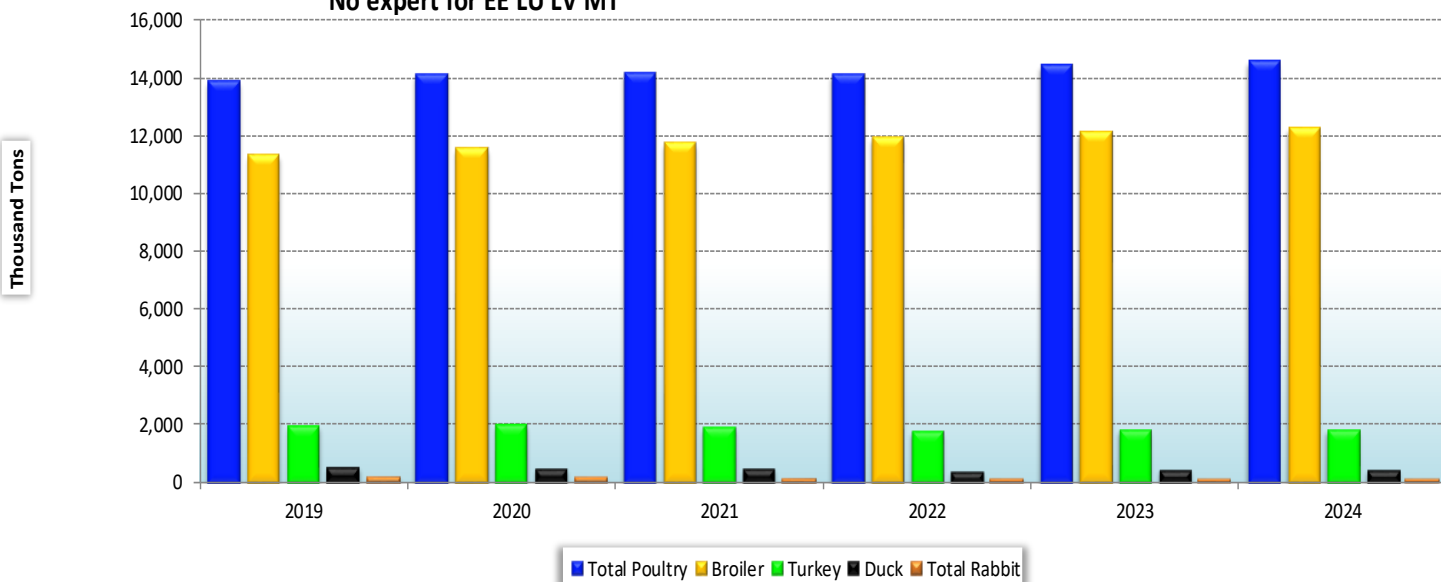
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FORECAST

Experts EU27 production forecast on Poultry and Rabbit

Missing or incomplete data for BE BG EE EL HR LV LT MT SK SE

No expert for EE LU LV MT

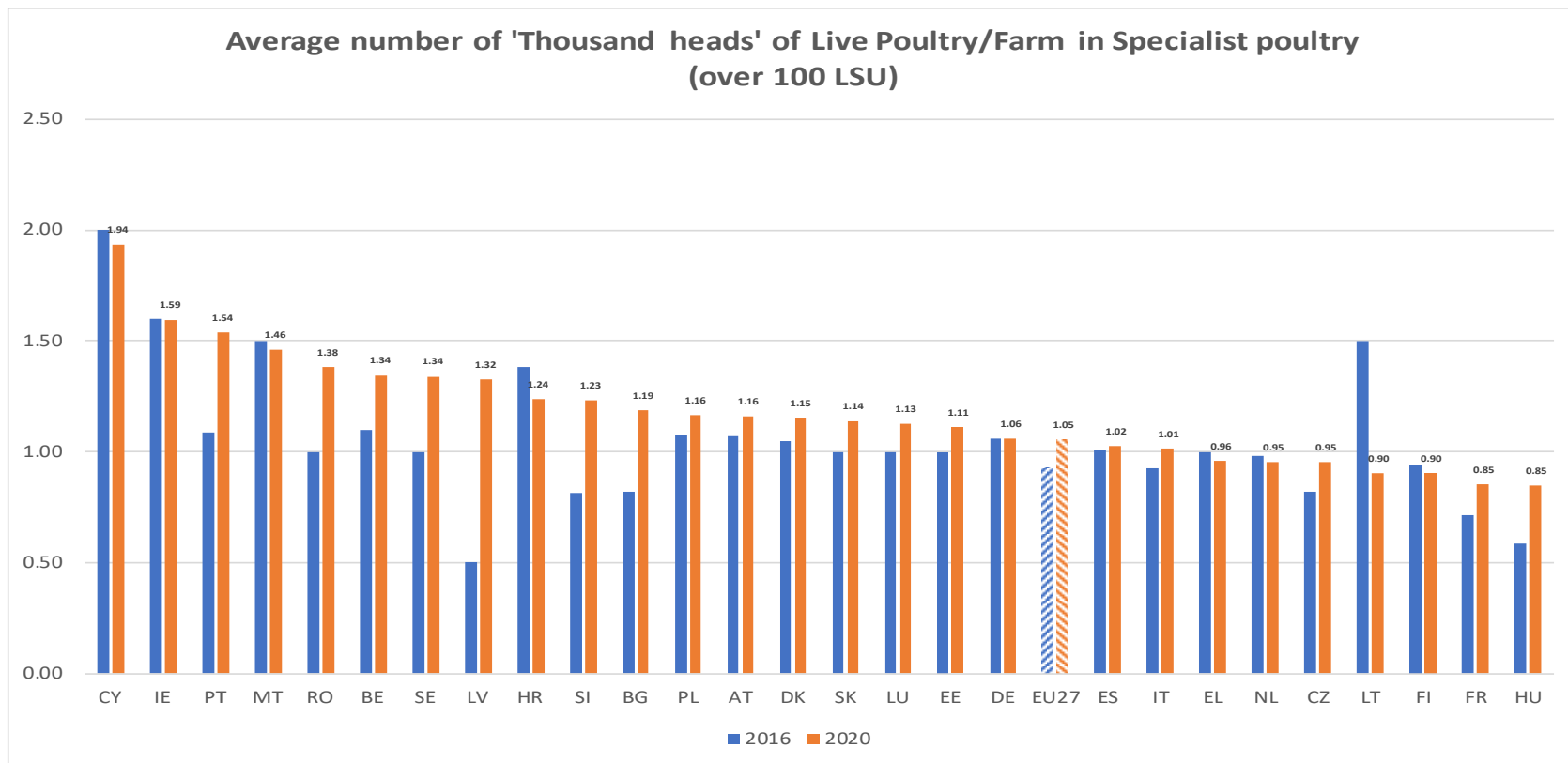


	2019	2020	2021	2022	2023	2024	% 2023/ 2022	% 2024/ 2023
Total Poultry	13,860	14,072	14,125	14,108	14,397	14,551	+ 2.1%	+ 1.1%
Broiler	11,289	11,544	11,732	11,915	12,121	12,240	+ 1.7%	+ 1.0%
Turkey	1,946	2,013	1,888	1,766	1,804	1,805	+ 2.1%	+ 0.1%
Duck	518	452	458	364	402	435	+ 10.6%	+ 8.2%
Total Rabbit	180	164	136	123	115	111	- 6.0%	- 3.8%

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FARM STRUCTURE SURVEY

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

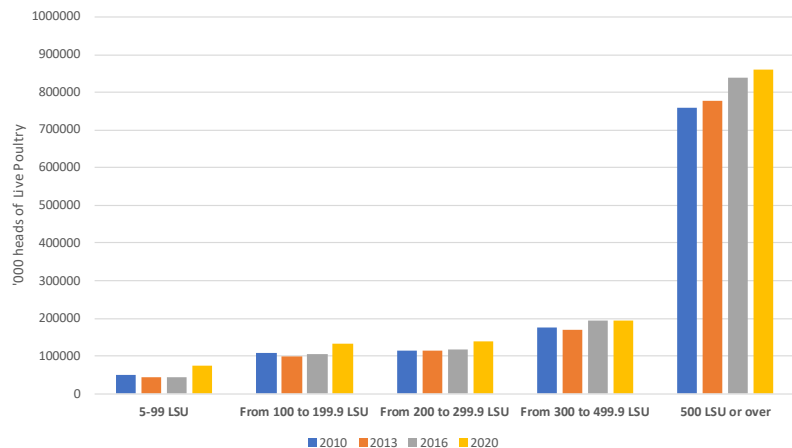


Specialist poultry - EU

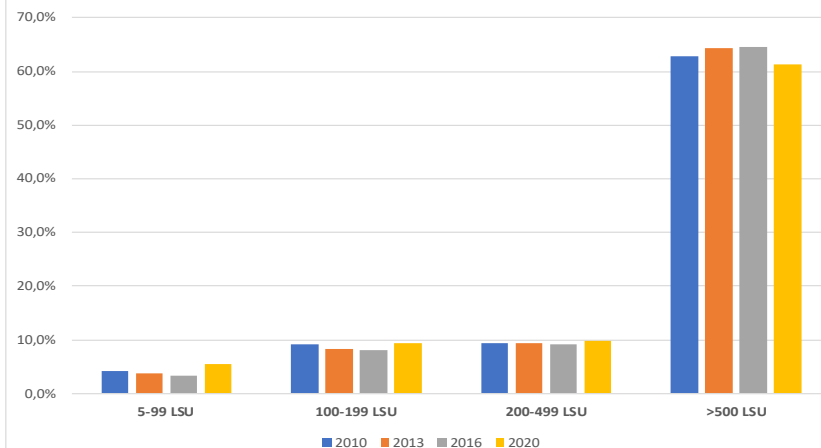
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY

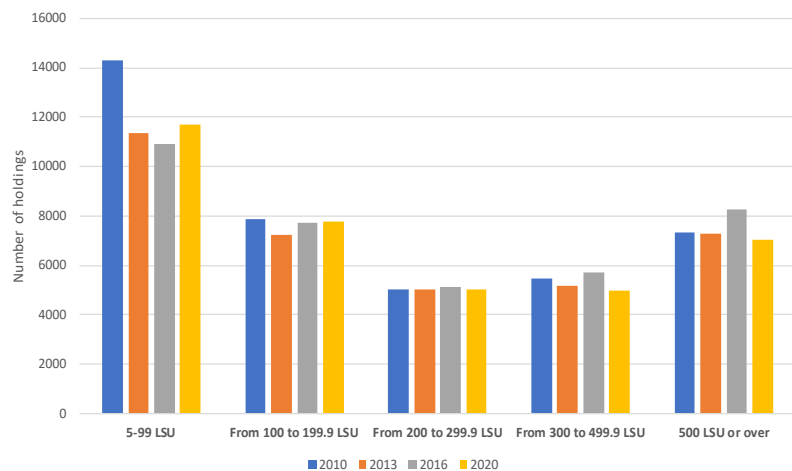
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



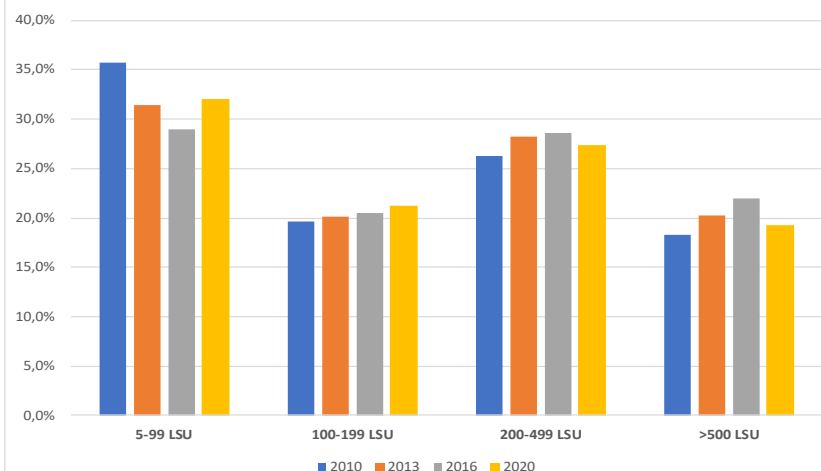
Share of animals by LSU class (over 5 LSU)



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

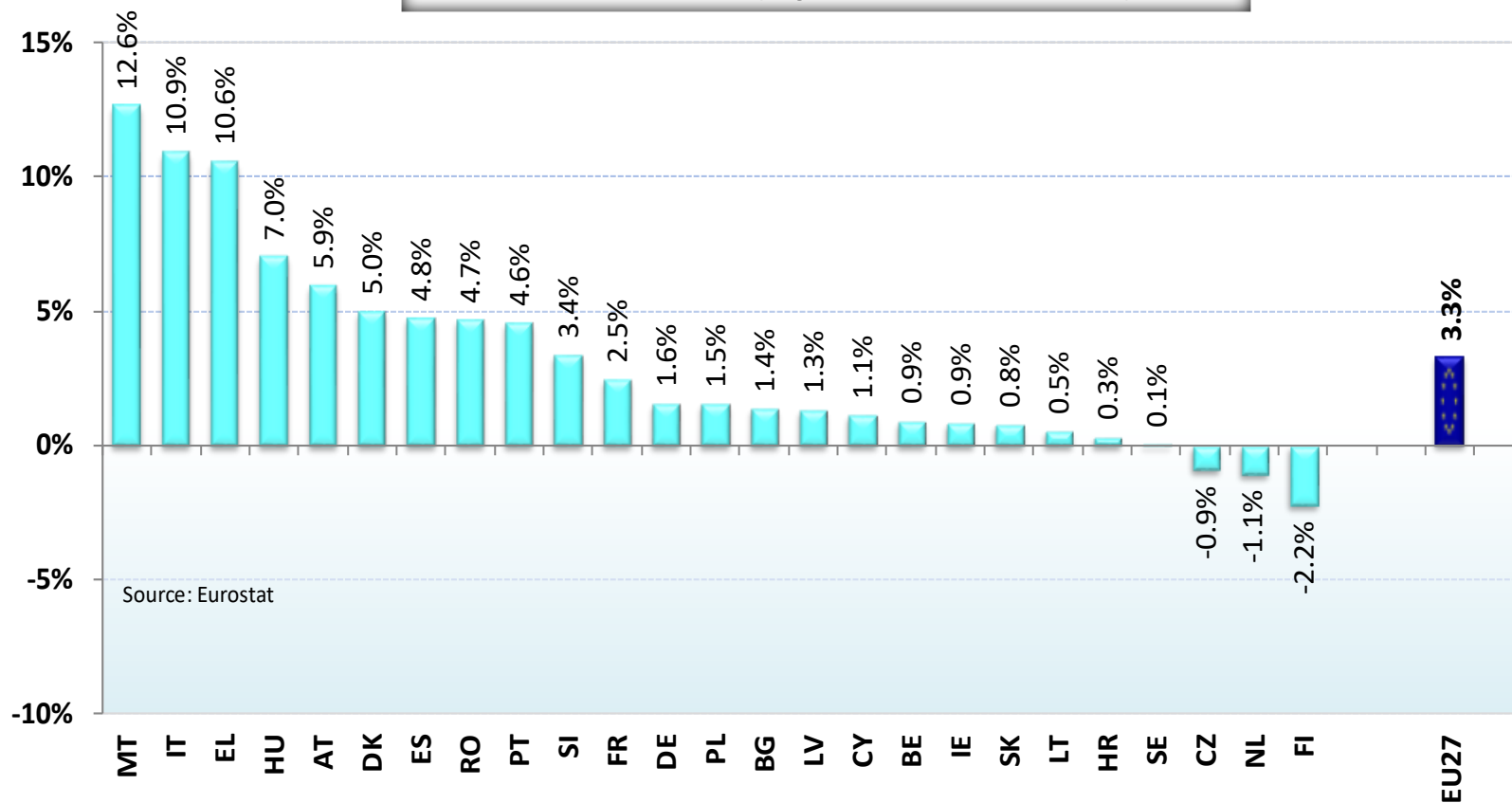


Share of holdings by LSU class (over 5 LSU)



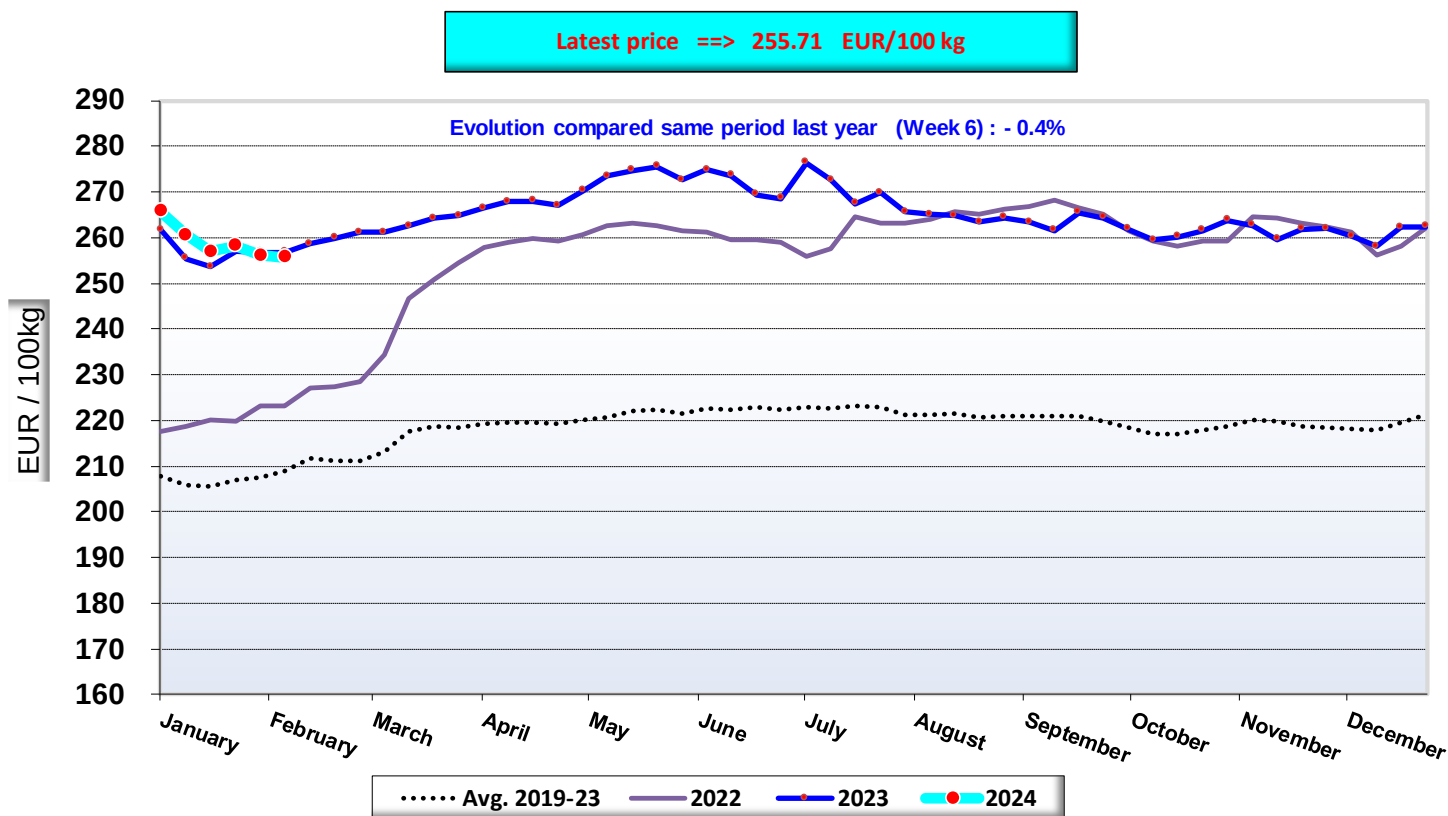
PRODUCTION

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



22 February 2024

Evolution of the weekly EU* average price for Broiler

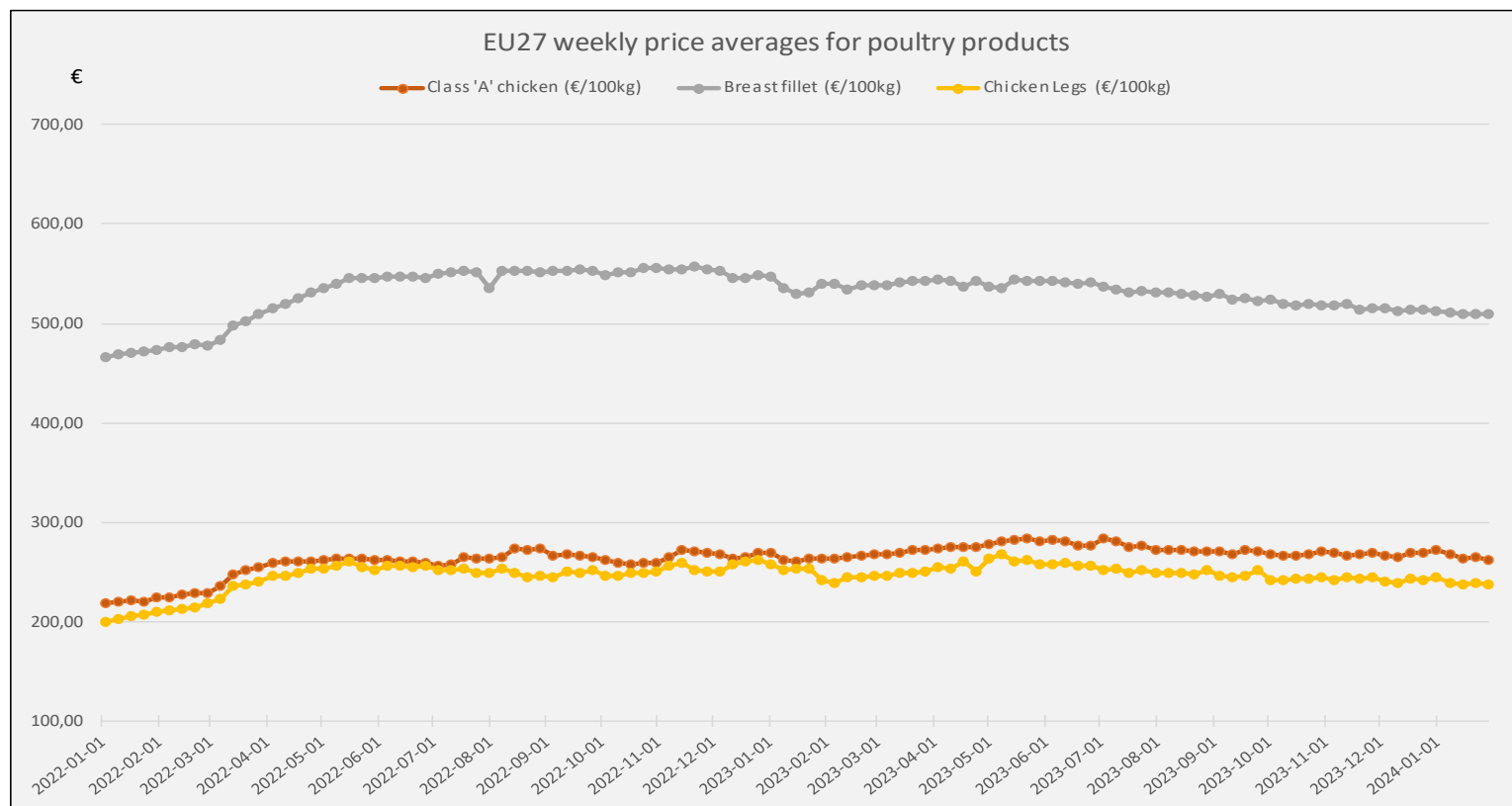


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 5

EU27 weekly price averages for poultry products

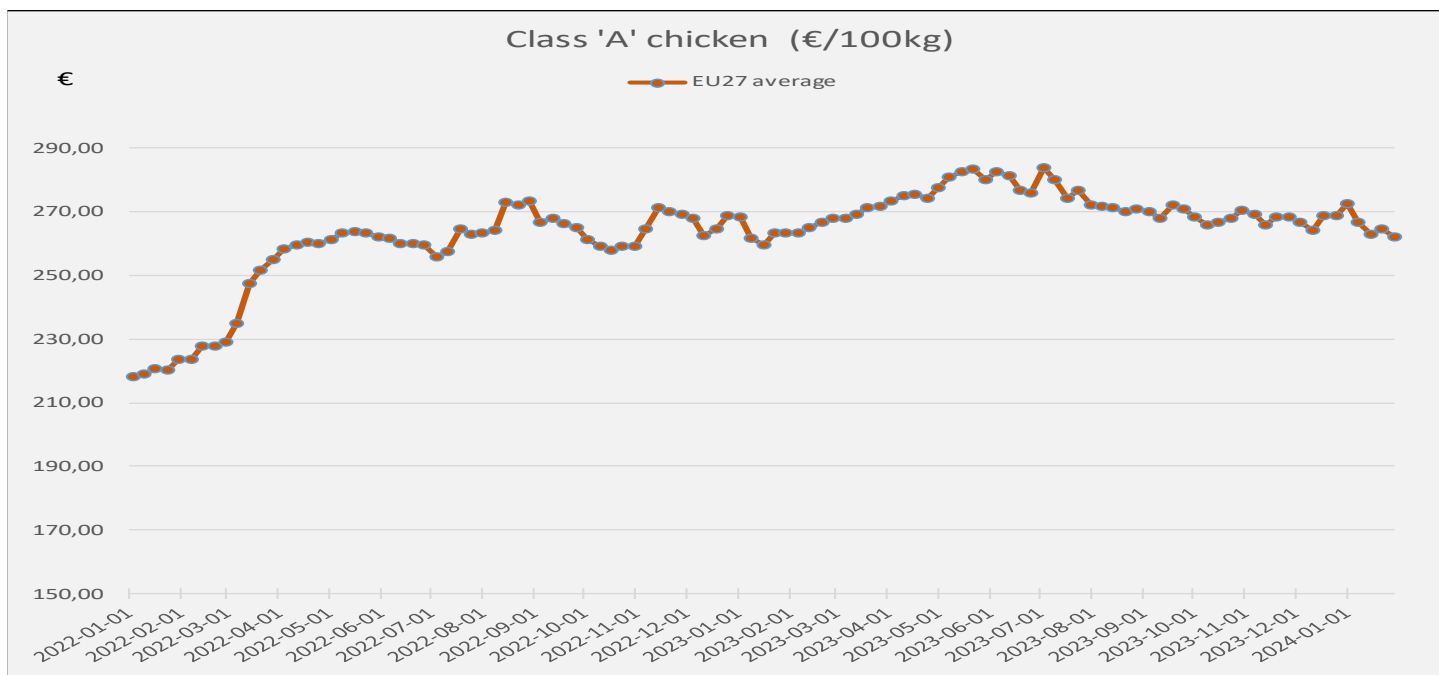


Week - 5	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	262,16	509,30	236,93

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 - 5 **Class 'A' chicken**



Week - 5	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	262,16	- 0,9%	- 3,8%	- 0,4%

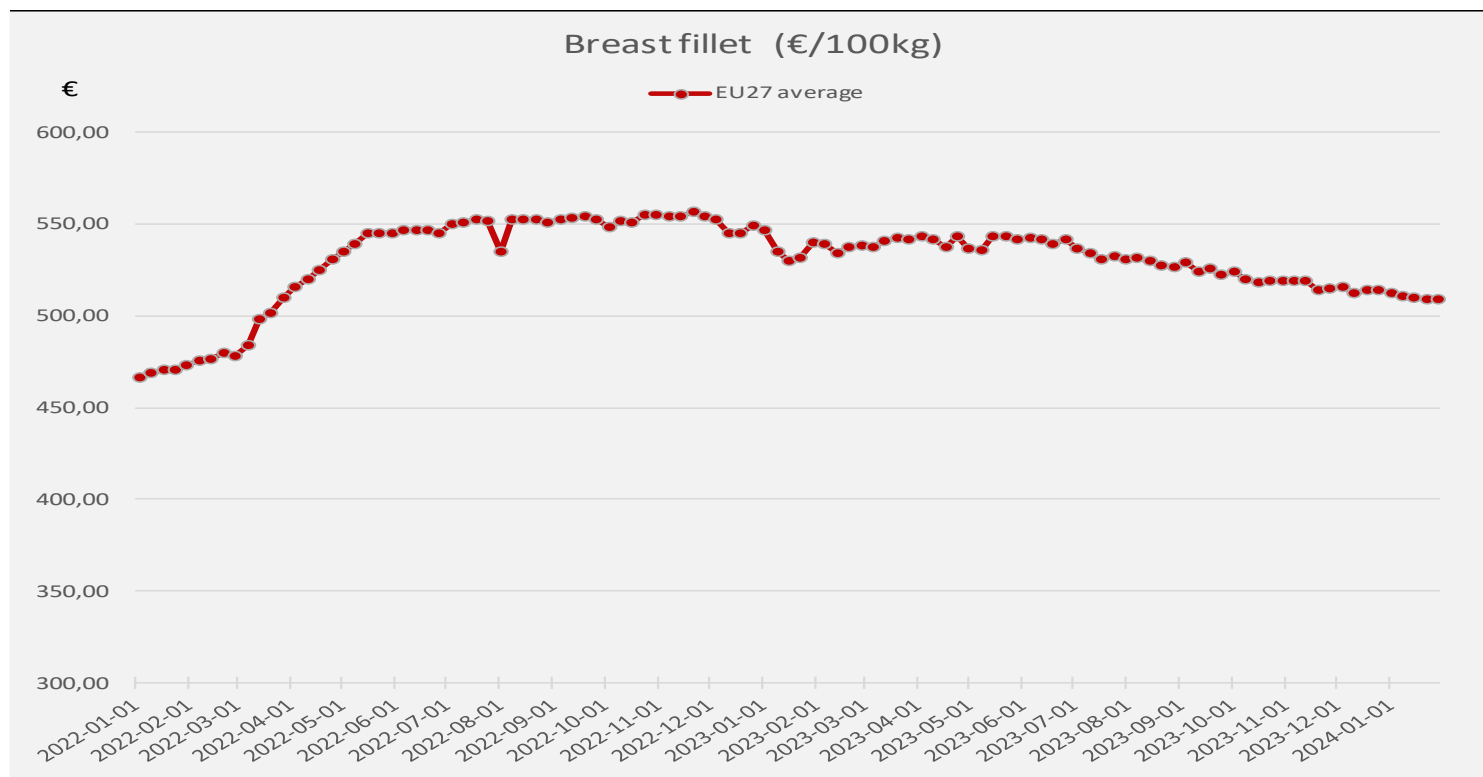
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Breast fillet'

Week - 5 Breast fillet



Week - 5	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	509,30	- 0,0%	- 0,6%	- 5,7%

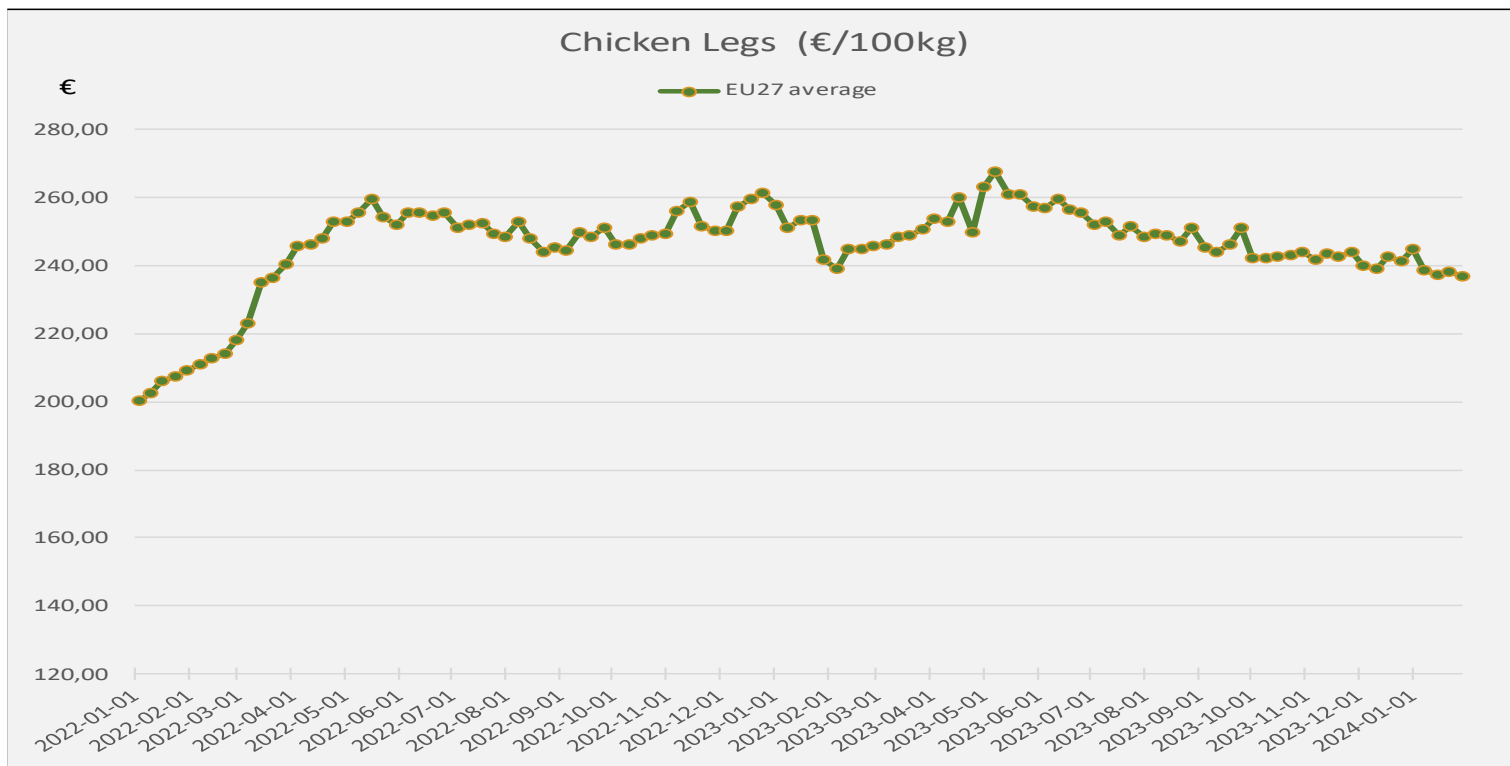
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Chicken legs'

Week - 5 Chicken Legs



Week - 5	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	236,93	- 0,5%	- 3,3%	- 2,0%

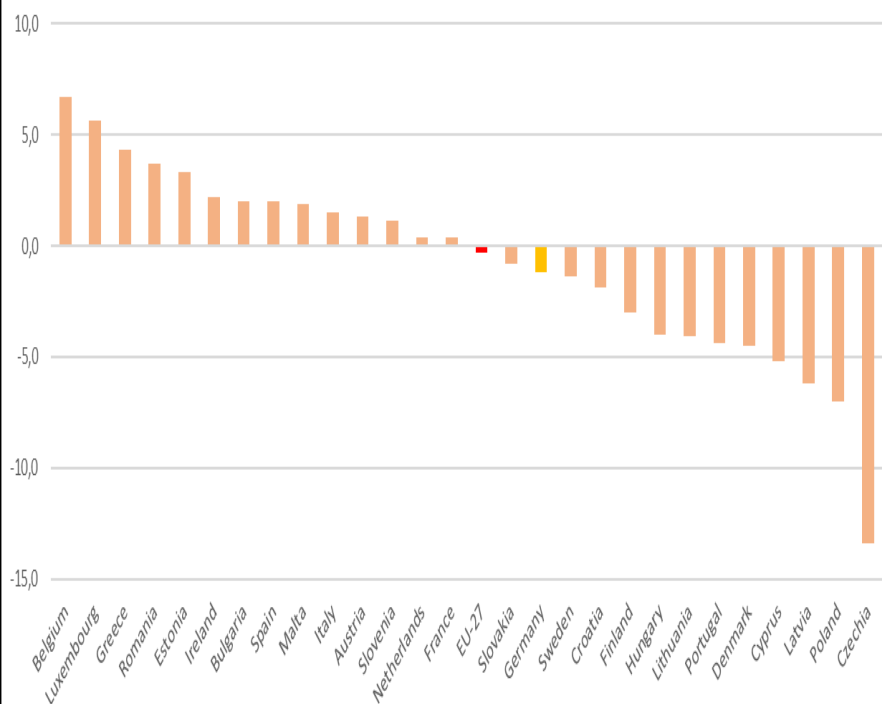
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

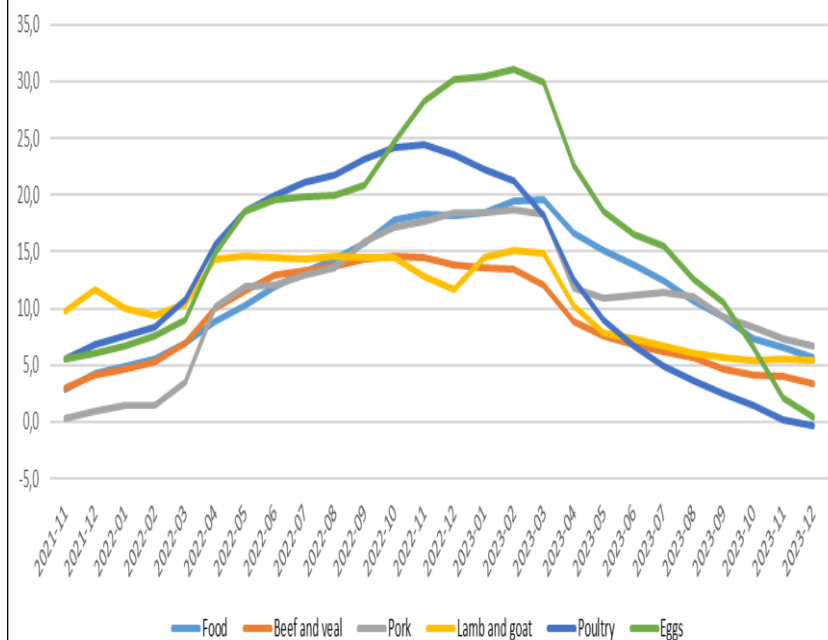
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Harmonised index of consumer prices

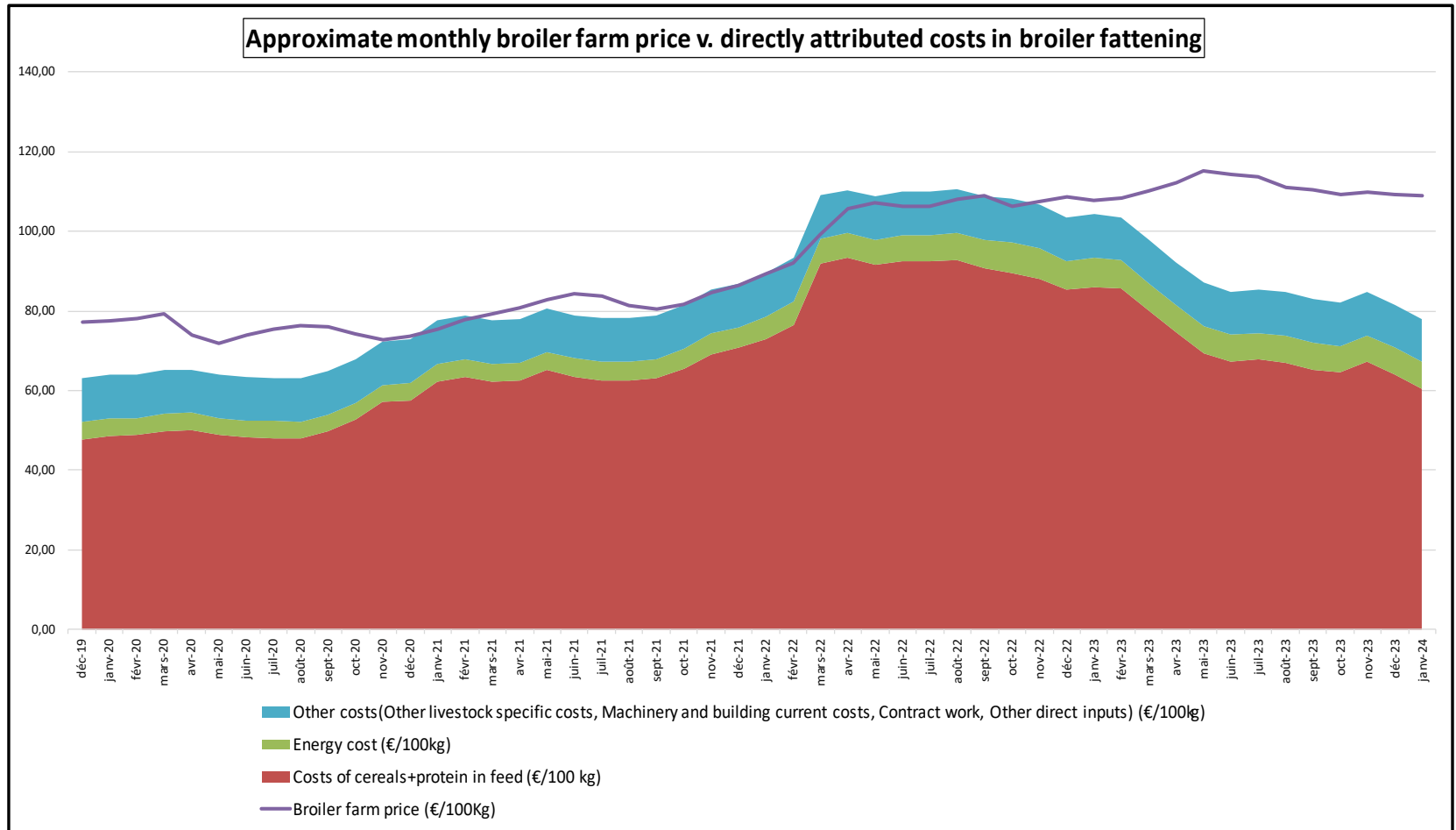
Percentage change of poultry index of consumer prices
December 2023 / December 2022



Monthly evolution
% change m / m-12
harmonised index of consumer prices



COST BROILER PRODUCTION



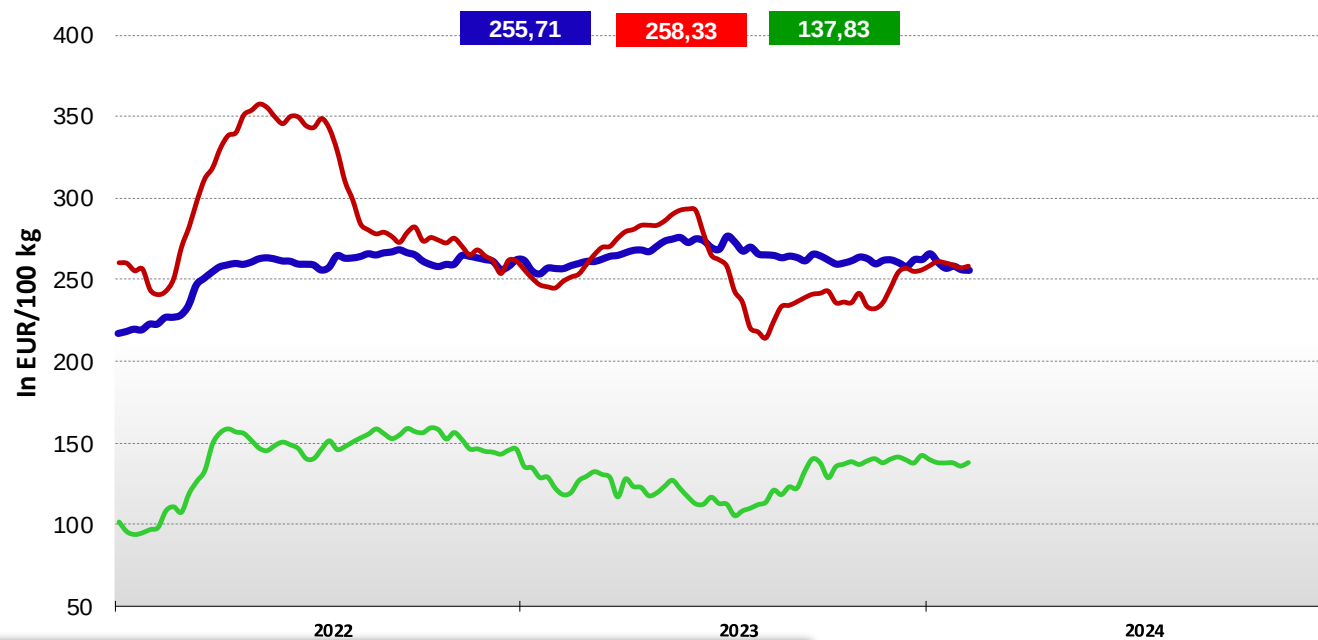
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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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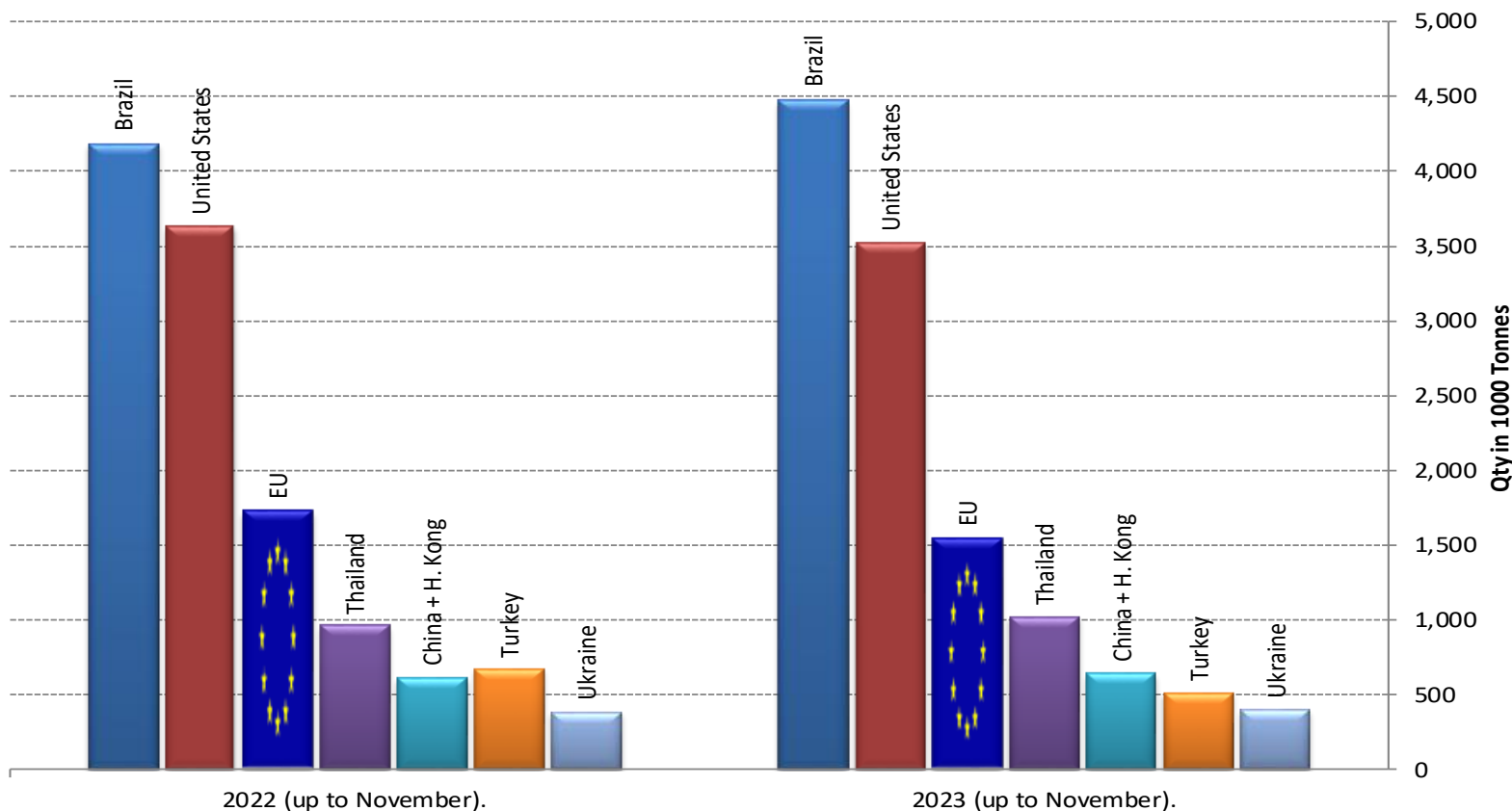
Broiler prices in EU, USA and Brazil



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

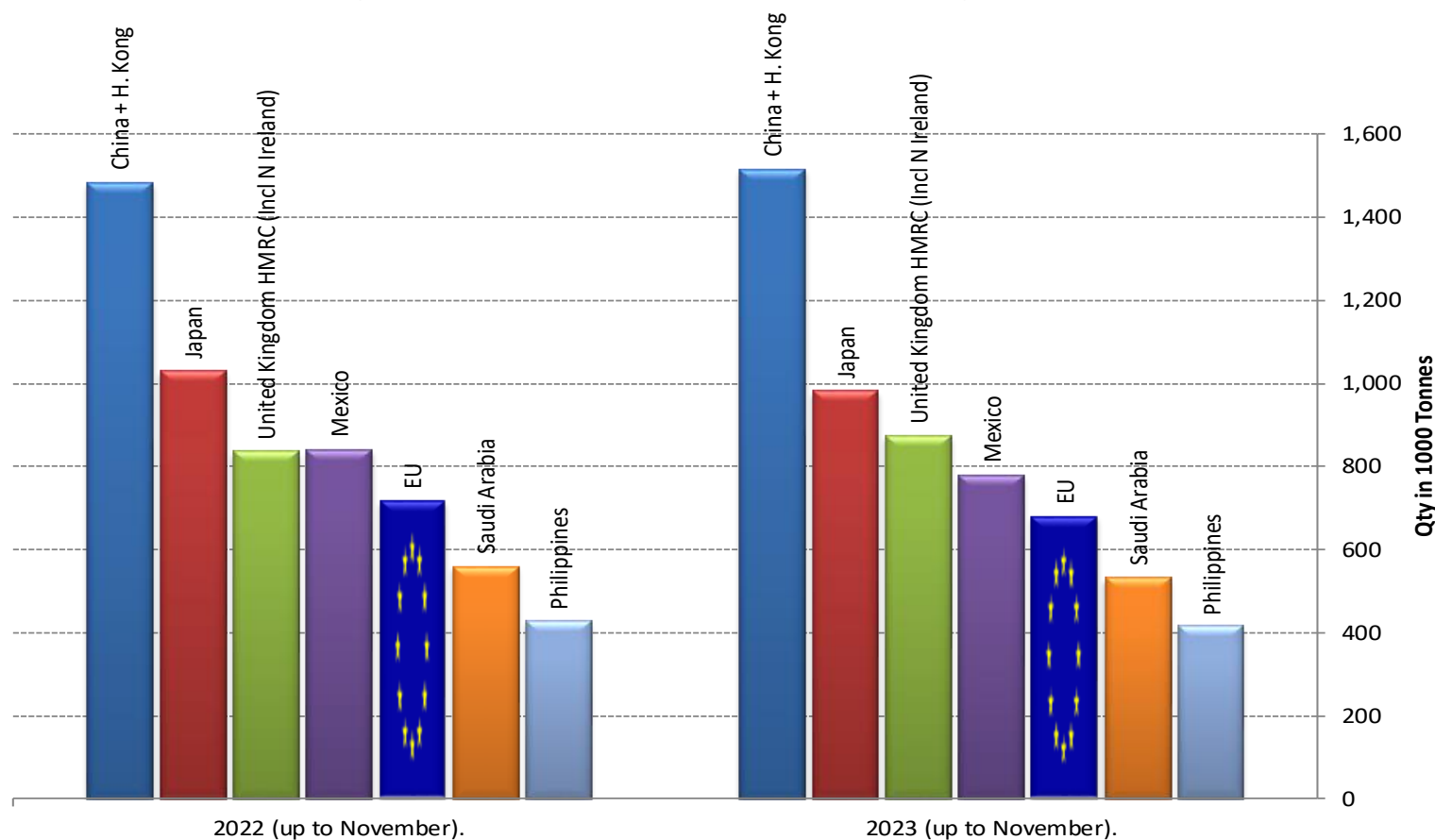
Main Exporters of POULTRY Products (up to November).



Source : GTA

Excl. Live animals

Main Importers of POULTRY Products (up to November).



Source : GTA

Excl. Live animals

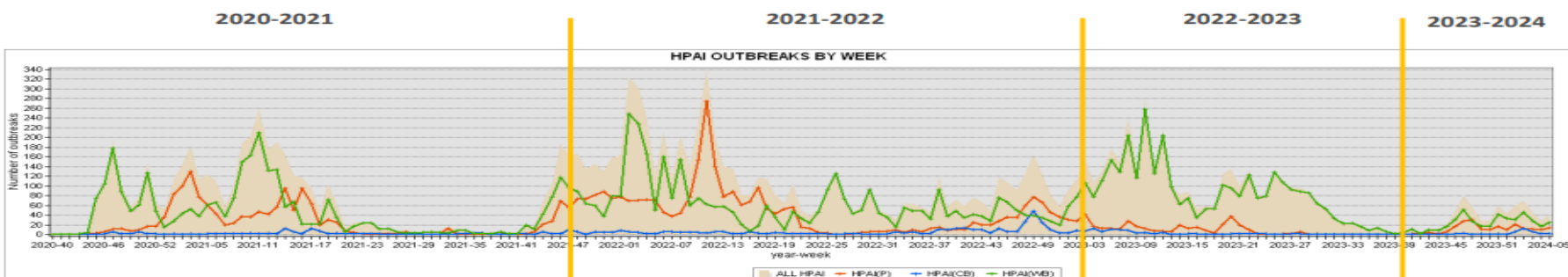
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Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 06/02/2024)

Country code	Count of	Sum of Number of animals	% of outbreaks	% of animals
HU	76	1.603.222	44%	30%
BG	10	1.333.364	6%	25%
PL	17	512.205	10%	10%
DE	26	473.679	15%	9%
FR	9	402.162	5%	8%
NL	3	156.943	2%	3%
IT	5	150.248	3%	3%
DK	9	145.054	5%	3%
BE	4	103.394	2%	2%
SK	4	92.366	2%	2%
CZ	2	89.300	1%	2%
HR	2	83.851	1%	2%
RO	3	73.747	2%	1%
SE	2	52.348	1%	1%
LT	1	6.361	1%	0%
Grand Total	173	5.278.244	100%	100%

Production type	Count of Production	Sum of Number of animals	% of outbreaks	% of animals
Broiler/Chicken	11	643.214	6%	12%
Laying hen	18	875.444	10%	17%
Duck	33	832.025	19%	16%
Turkey	54	1.235.369	31%	23%
Goose	21	123.660	12%	2%
Guinea fowl	1	17.256	1%	0%
Pheasant	2	9.785	1%	0%
Mixed	8	23.267	5%	0%
No information	25	1.518.224	14%	29%
Grand Total	173	5.278.244	100%	100%



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

In Tons of Carcase Weight

	2021		2022		Jan to Nov 2023		Compared to Jan to Nov 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
United Kingdom	725,611	32%	732,502	36%	676,313	37%	+1%
Ghana	228,066	10%	156,456	8%	139,105	8%	-6%
Congo (Dem. Rep.)	139,852	6%	125,422	6%	96,826	5%	-16%
Ukraine	162,267	7%	105,810	5%	79,771	4%	-18%
Saudi Arabia	58,457	3%	74,590	4%	60,011	3%	-13%
Benin	64,358	3%	63,516	3%	58,281	3%	-0%
Vietnam	31,784	1%	29,751	1%	51,333	3%	+80%
Congo	30,303	1%	35,562	2%	42,456	2%	+31%
Uzbekistan	32,390	1%	34,474	2%	40,012	2%	+28%
Switzerland	33,390	1%	33,784	2%	32,071	2%	+4%
Guinea	31,324	1%	32,876	2%	31,469	2%	+2%
Other Destinations	714,573	32%	605,496	30%	515,505	28%	-5%
Extra-EU	2,252,375		2,030,239		1,823,152		-1.8%
% Change				-10%			

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EU-27 Exports of poultry meat to selected destinations

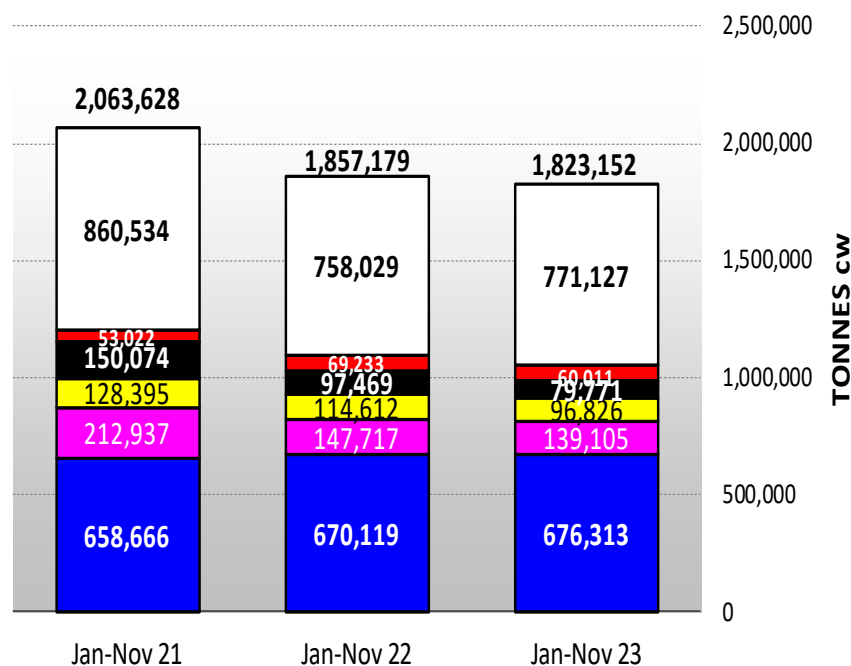
In Thousand Euros

	2021		2022		Jan to Nov 2023		Compared to Jan to Nov 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
United Kingdom	2,009,674	51%	2,652,356	56%	2,364,318	54%	-1.9%
Ghana	224,103	6%	167,715	4%	146,583	3%	-7.7%
Congo (Dem. Rep.)	116,553	3%	145,772	3%	107,447	2%	-18.0%
Ukraine	119,533	3%	102,729	2%	118,368	3%	+29.1%
Saudi Arabia	93,283	2%	159,672	3%	115,081	3%	-23.5%
Benin	87,264	2%	106,959	2%	99,212	2%	+0.4%
Vietnam	35,592	1%	39,533	1%	63,873	1%	+69.2%
Congo	26,636	1%	36,276	1%	38,719	1%	+19.1%
Uzbekistan	23,945	1%	27,742	1%	31,987	1%	+28.1%
Switzerland	179,202	5%	210,024	4%	199,823	5%	+6.5%
Guinea	31,994	1%	43,756	1%	44,189	1%	+8.2%
Other Destinations	1,024,600	26%	1,043,605	22%	1,016,632	23%	+7.9%
Extra-EU	3,972,379		4,736,138		4,346,231		+0.9%
% Change				+19.2%			

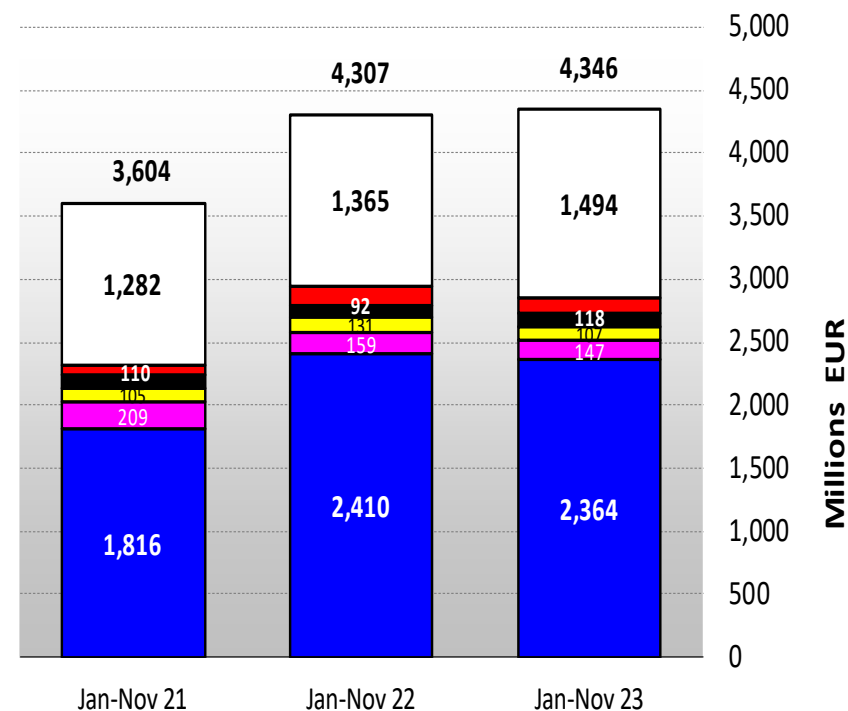
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EU-27 poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 107 ('Millions EUR)

EU-27 Imports of poultry meat from selected origins

In Tons of Carcase Weight

	2021		2022		Jan to Nov 2023		Compared to Jan to Nov 2022
	Tons	% Extra EU	Tons	% Extra EU	Tons	% Extra EU	
Brazil	251,887	32%	301,201	35%	274,241	33%	-0%
Ukraine	102,892	13%	162,837	19%	217,823	26%	+47%
United Kingdom	274,667	34%	210,851	25%	155,882	19%	-22%
Thailand	130,658	16%	131,223	15%	140,133	17%	+14%
China	20,916	3%	32,864	4%	33,717	4%	+10%
Chile	2,441	0%	466	0%	3,032	0%	+++
Argentina	3,151	0%	4,096	0%	2,969	0%	-19%
Bosnia-Herz.	1,608	0%	3,000	0%	2,747	0%	-2%
Switzerland	2,310	0%	2,166	0%	2,047	0%	-2%
Norway	2,508	0%	2,094	0%	2,012	0%	-1%
Tunisia	1,840	0%	1,721	0%	846	0%	-51%
Other Destinations	2,179	0%	2,133	0%	2,001	0%	+6%
Extra-EU	797,056		854,651		837,450		+5.8%
% Change				7%			

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EU-27 Imports of poultry meat from selected origins

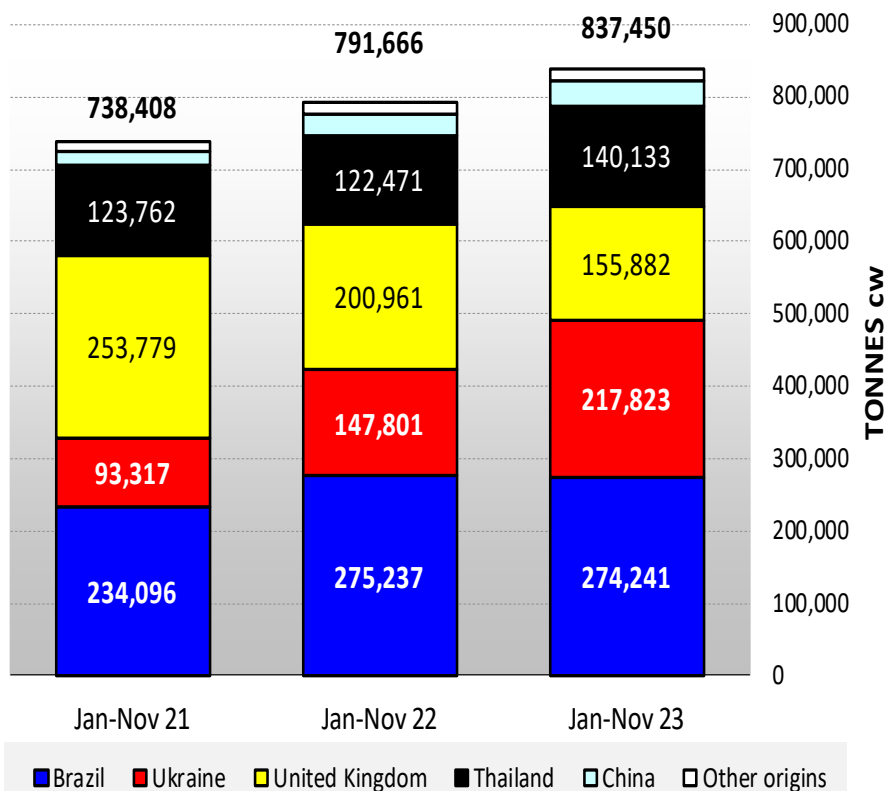
In Thousand Euros

	2021		2022		Jan to Nov 2023		Compared to Jan to Nov 2022
	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	1 000 EUR	% Extra EU	
Brazil	388,472	29%	669,662	31%	567,392	29%	-7.7%
Ukraine	166,208	12%	324,836	15%	391,907	20%	+30.9%
United Kingdom	327,280	24%	368,063	17%	320,926	16%	-6.1%
Thailand	317,487	24%	519,225	24%	463,296	23%	-3.3%
China	95,081	7%	186,175	9%	169,850	9%	-1.9%
Chile	6,019	0%	1,537	0%	6,876	0%	+++
Argentina	6,508	0%	11,463	1%	9,437	0%	-7.3%
Bosnia-Herz.	10,345	1%	10,728	1%	8,568	0%	-14.9%
Switzerland	5,300	0%	8,975	0%	6,489	0%	-25.4%
Norway	7,914	1%	8,286	0%	8,424	0%	+3.1%
Tunisia	1,140	0%	1,702	0%	564	0%	-66.9%
Other Destinations	14,325	1%	17,358	1%	17,911	1%	+22.7%
Extra-EU	1,346,080		2,128,009		1,971,642		+0.4%
% Change				+58.1%			

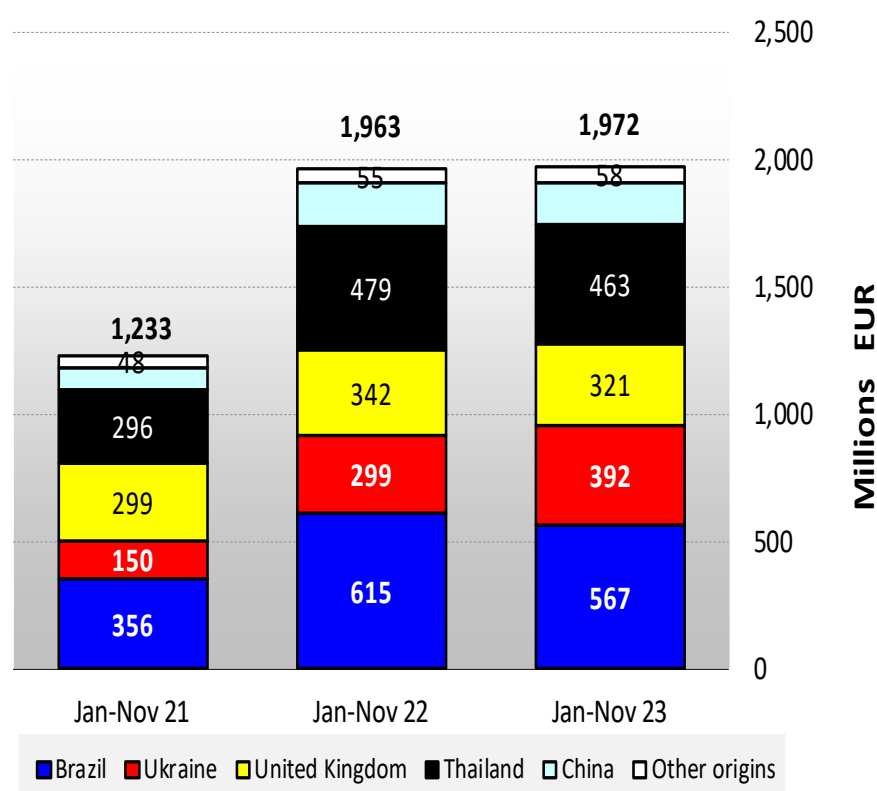
22 February 2024

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

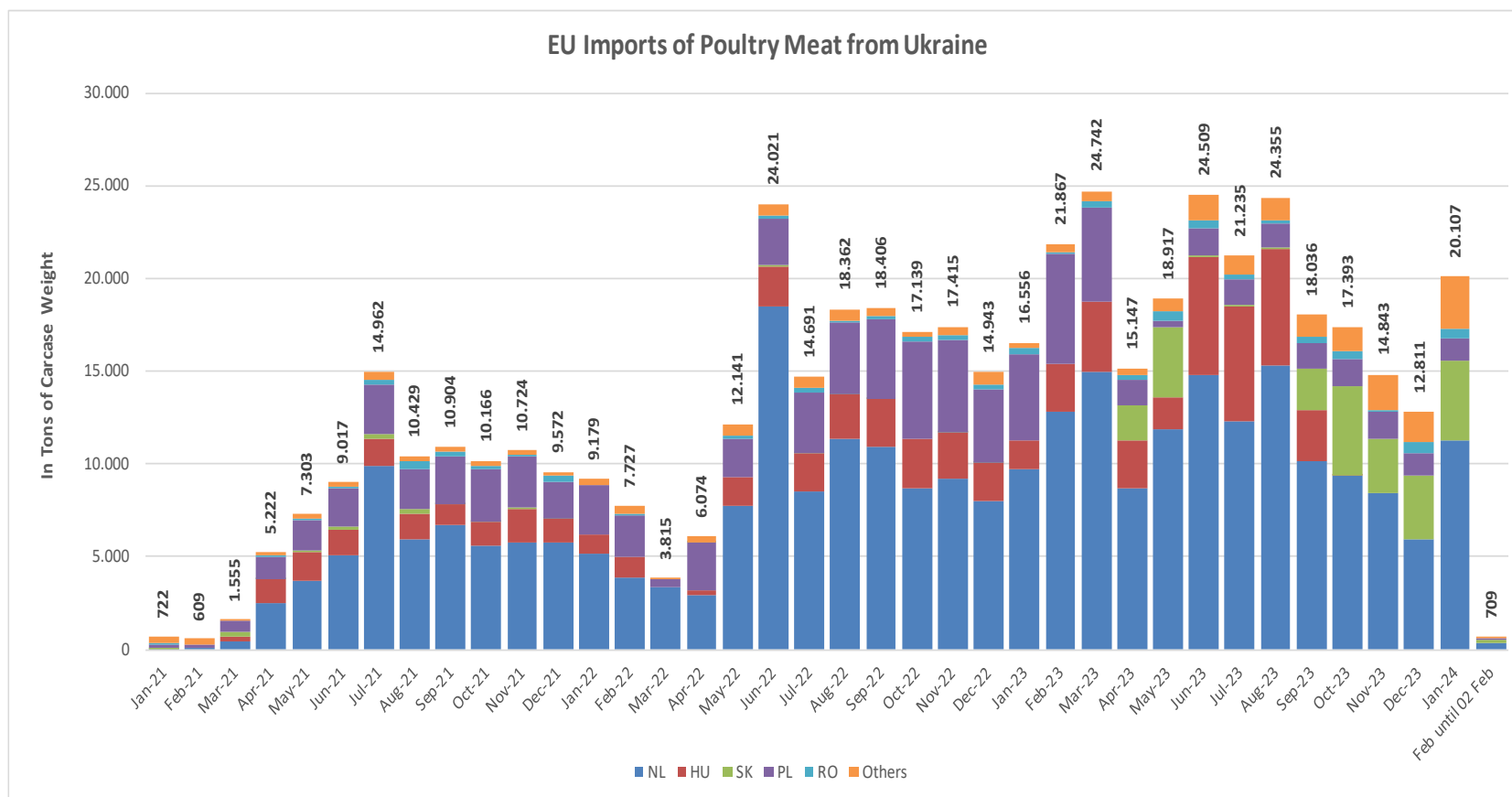


EU IMPORTS of Poultry Meat (Millions EUR)



22 February 2024

EU-27 Imports of poultry meat from Ukraine



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

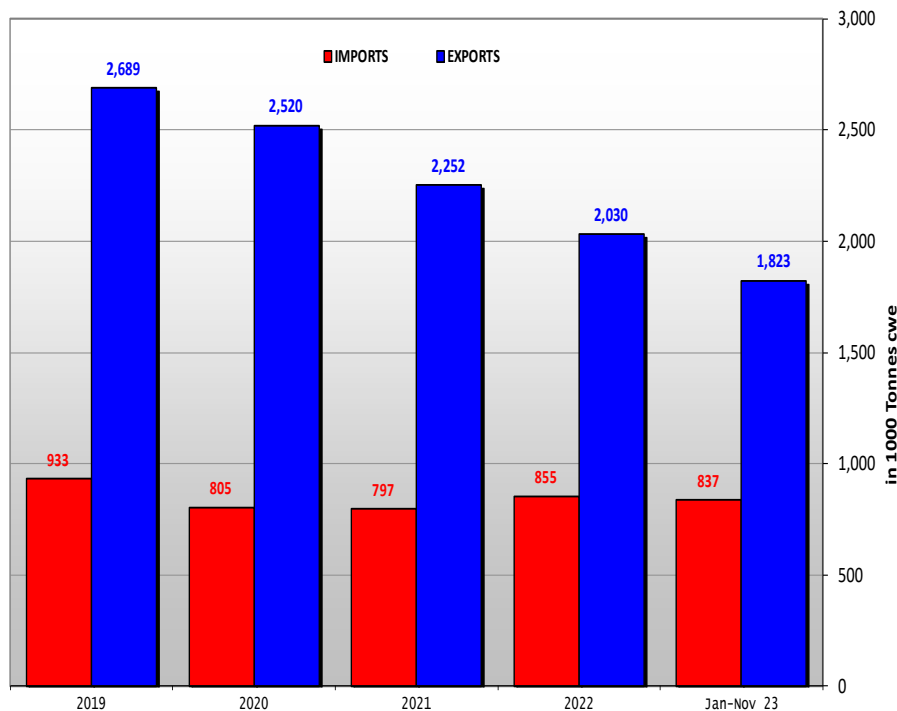
Please note that data is not completely stabilized for most recent periods.

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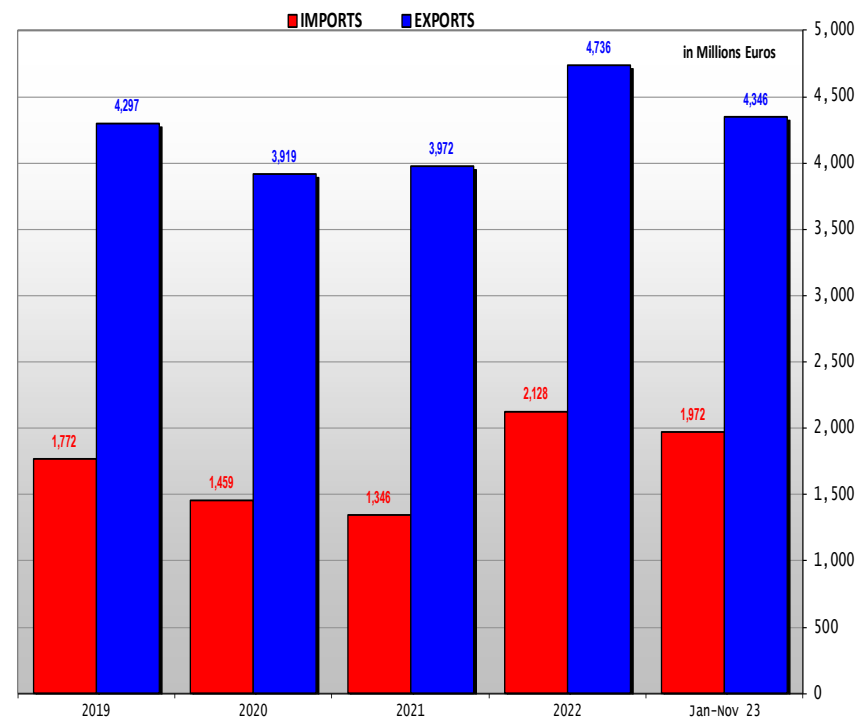
TRADE

BALANCE

in 1000 tonnes cwe



in million EUR



22 February 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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