

EU Market Situation for Poultry



Expert Group for Agricultural Markets

29 August 2024

FORECAST

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%	↘

FORECAST

EU production of broiler

Qty in Tonnes
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 Tonnes
Source : Eurostat, forecast 2024 by MS

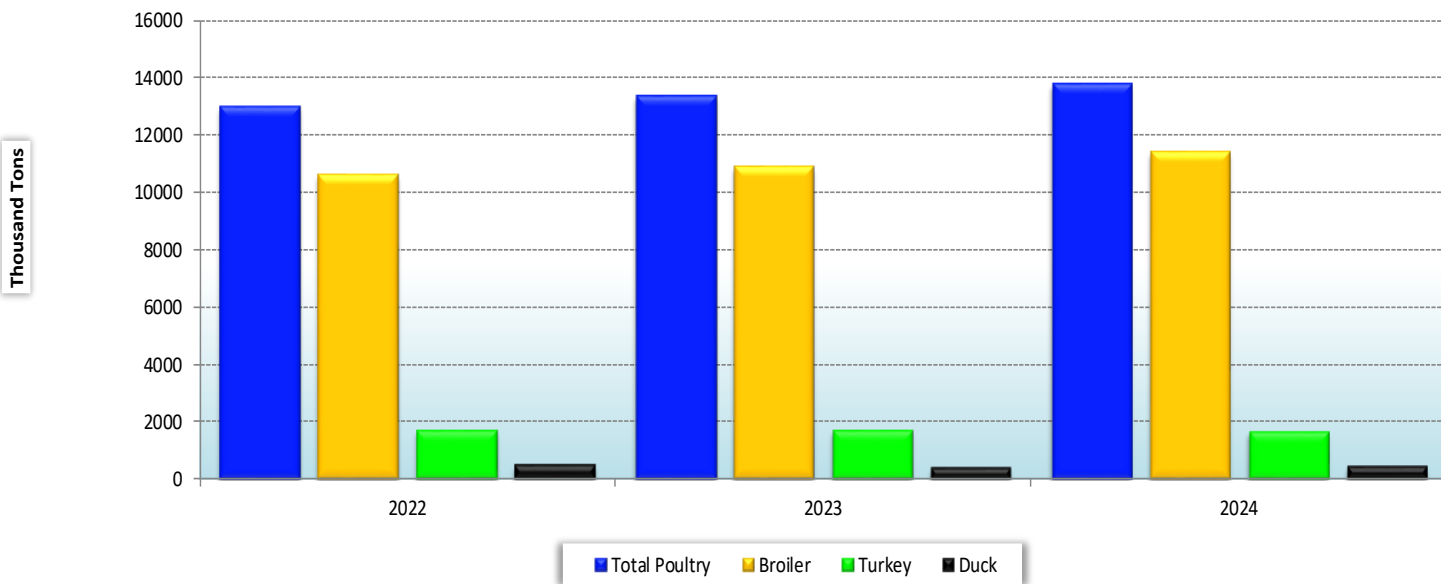
	2022	2023	% 2023/2022	trend 2024/2023
DE	406,000	422,000	3.9	↘
PL	409,170	367,310	-10.2	↘
ES	231,590	248,030	7.1	↘
IT	211,130	242,750	15.0	↗
FR	244,920	240,230	-1.9	↗
HU	63,910	56,210	0.0	→
PT	45,650	44,590	-2.3	↗
IE	14,720	16,400	11.4	↗
FI	8,840	8,810	-0.3	↘
BE	0	6,570		↗
SI	5,220	5,590	7.1	↘
SE	4,690	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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FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT



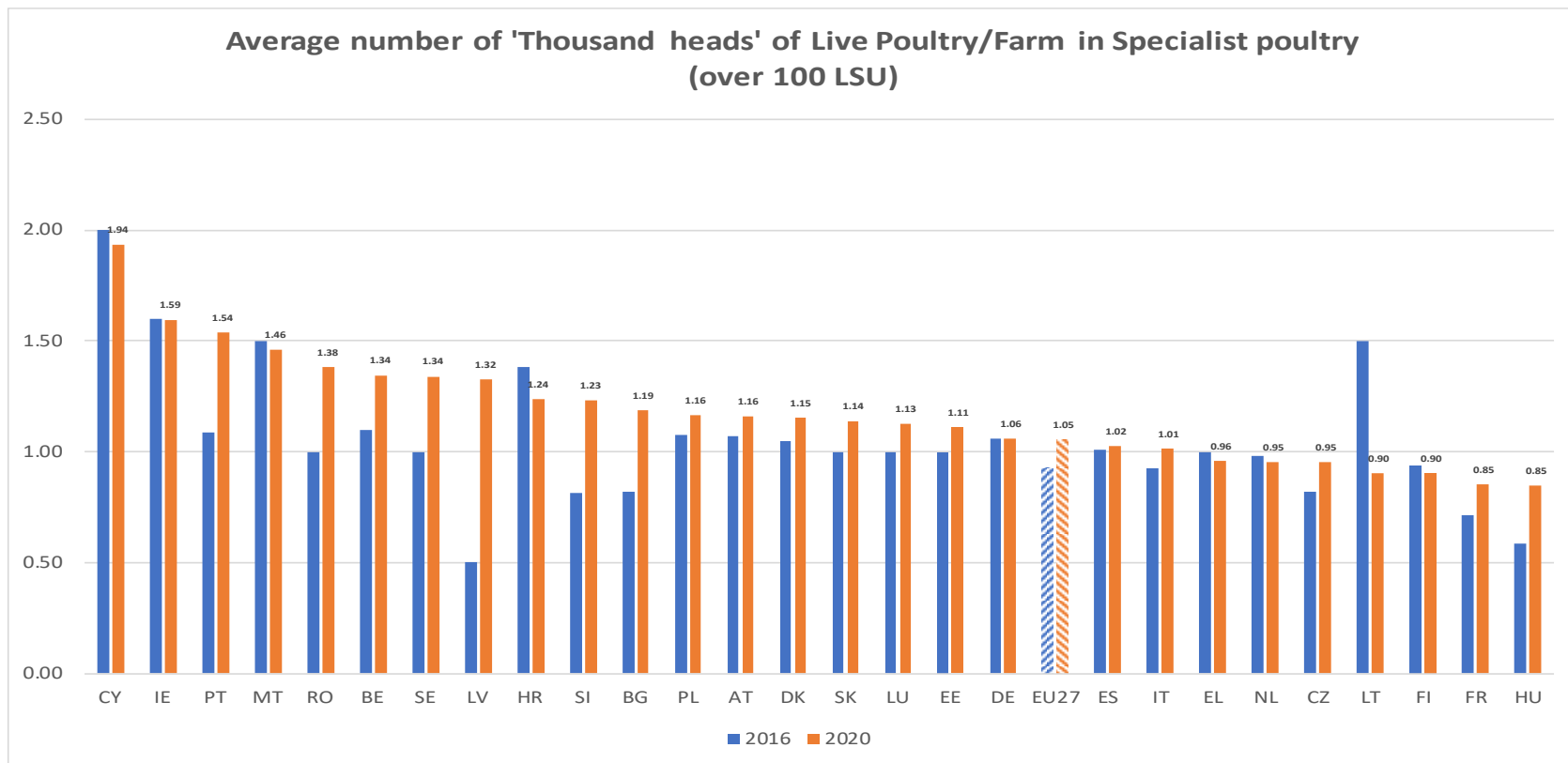
	2022	2023	2024	% 2023/ 2022	% 2024/ 2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* Source: Eurostat, forecast 2024 by MS

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FARM STRUCTURE SURVEY

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

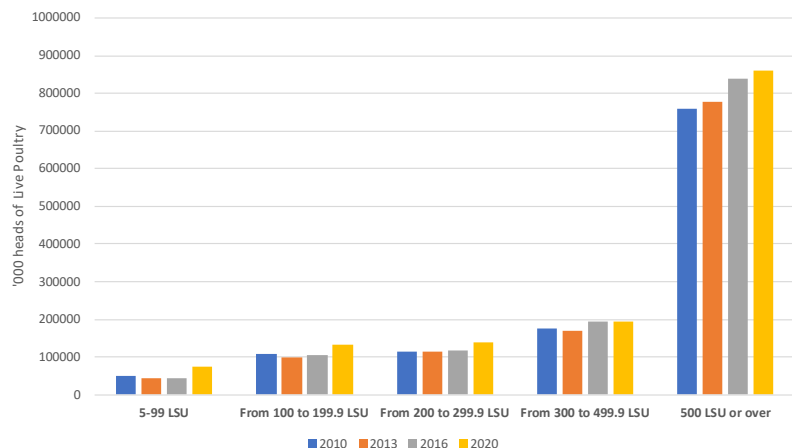


Specialist poultry - EU

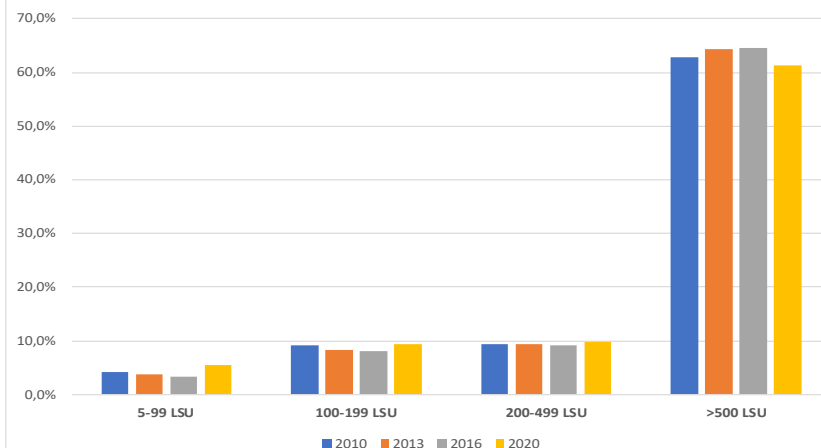
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY

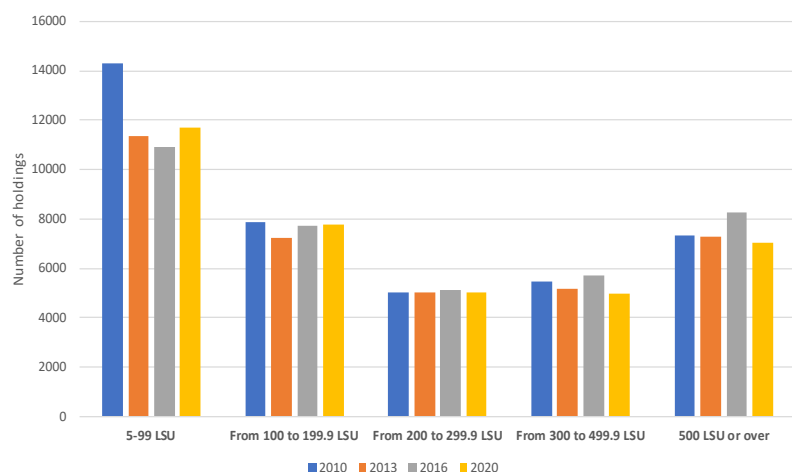
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



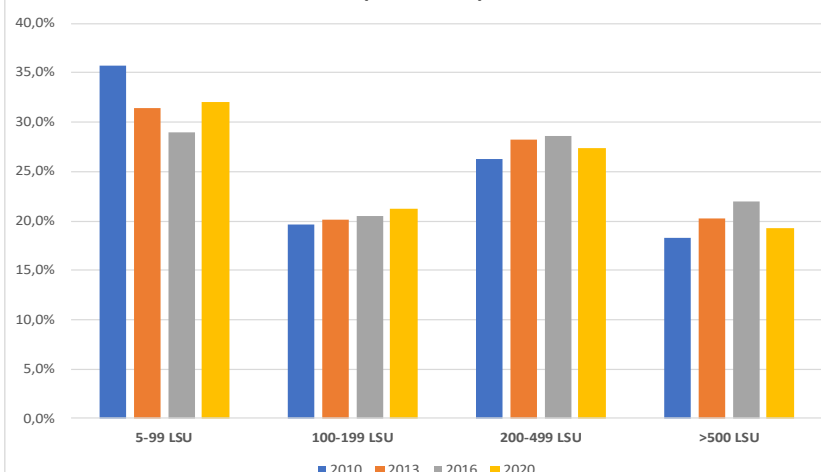
Share of animals by LSU class (over 5 LSU)



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

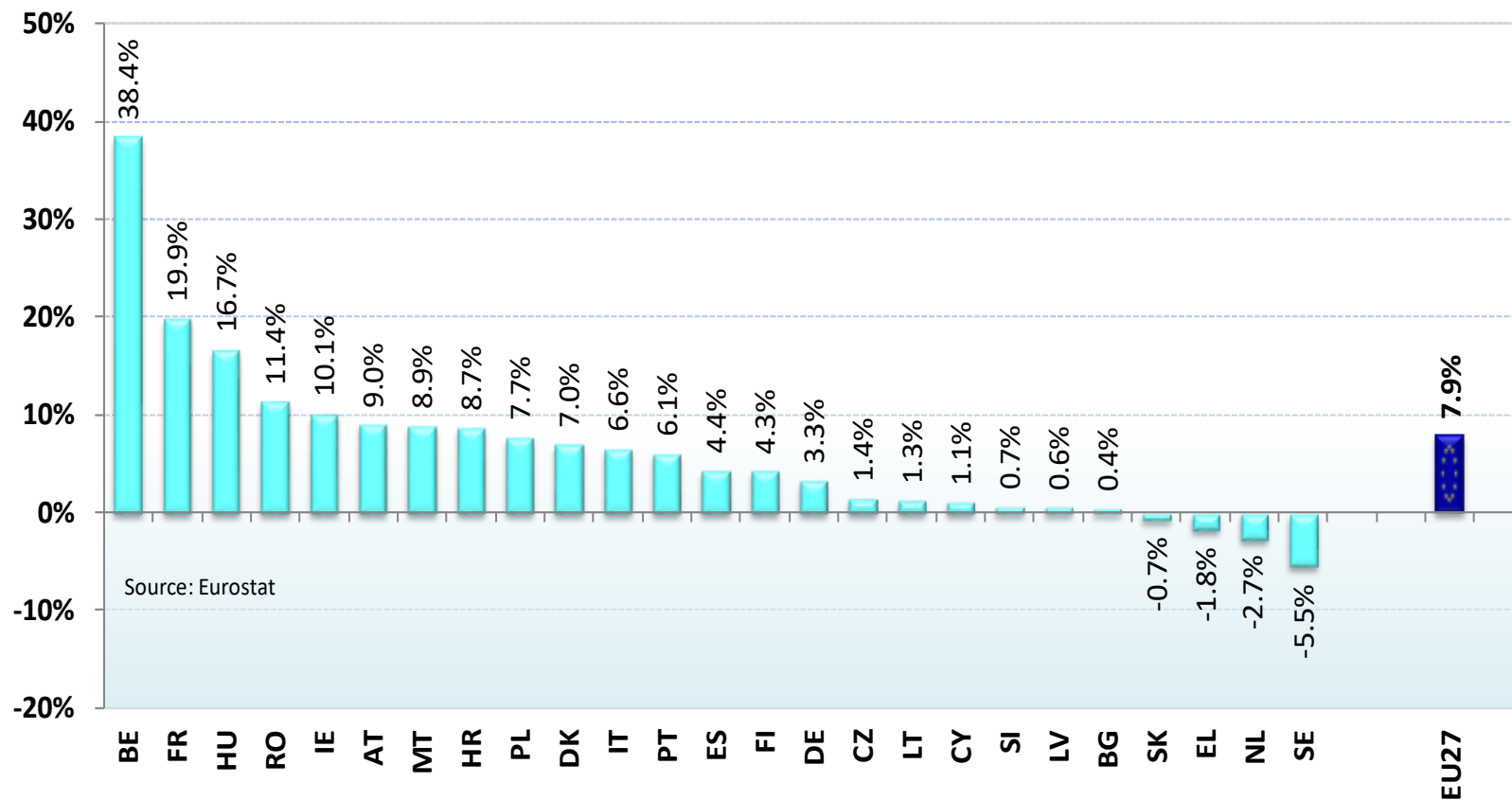


Share of holdings by LSU class (over 5 LSU)



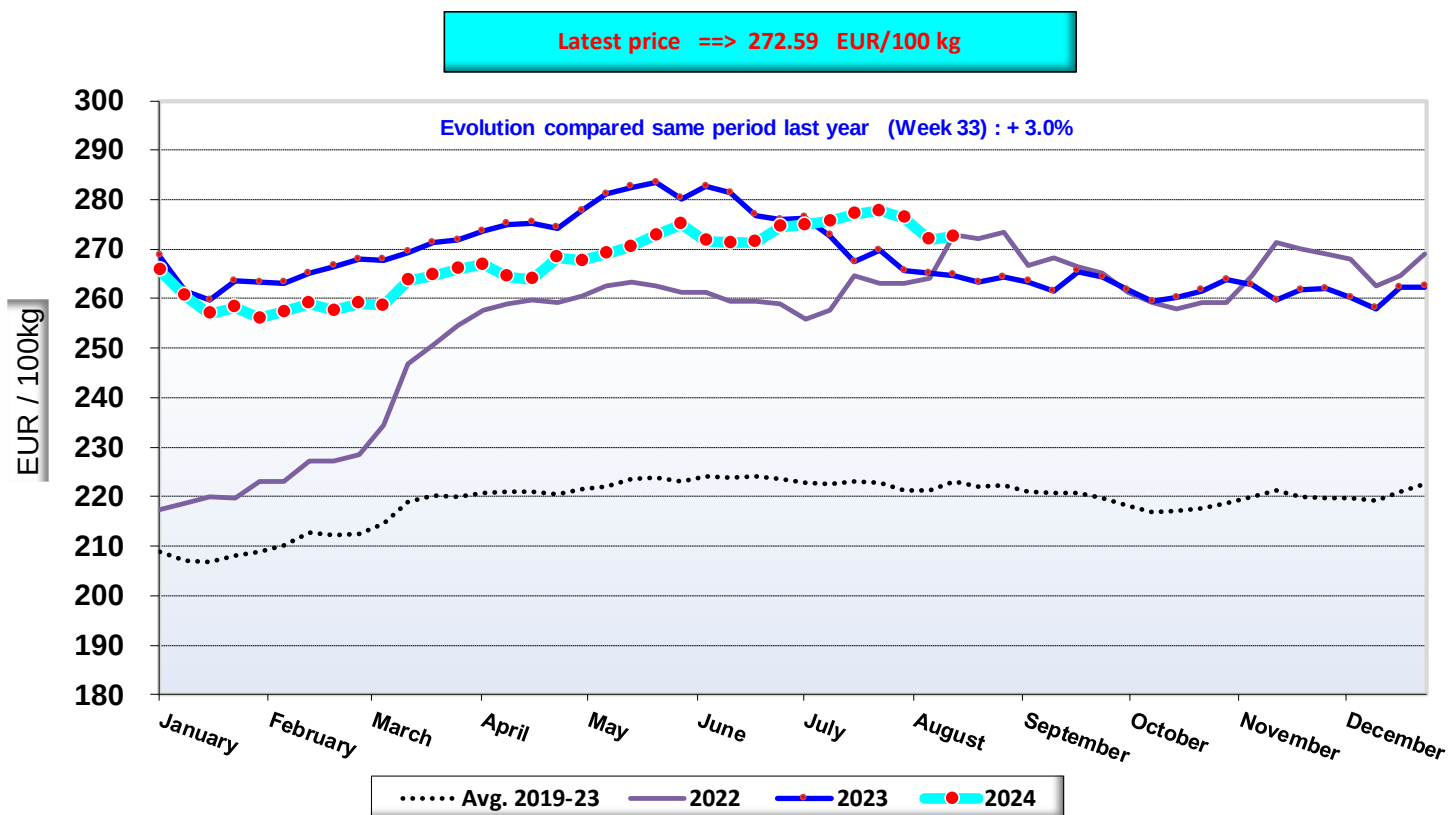
PRODUCTION

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



29 August 2024

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

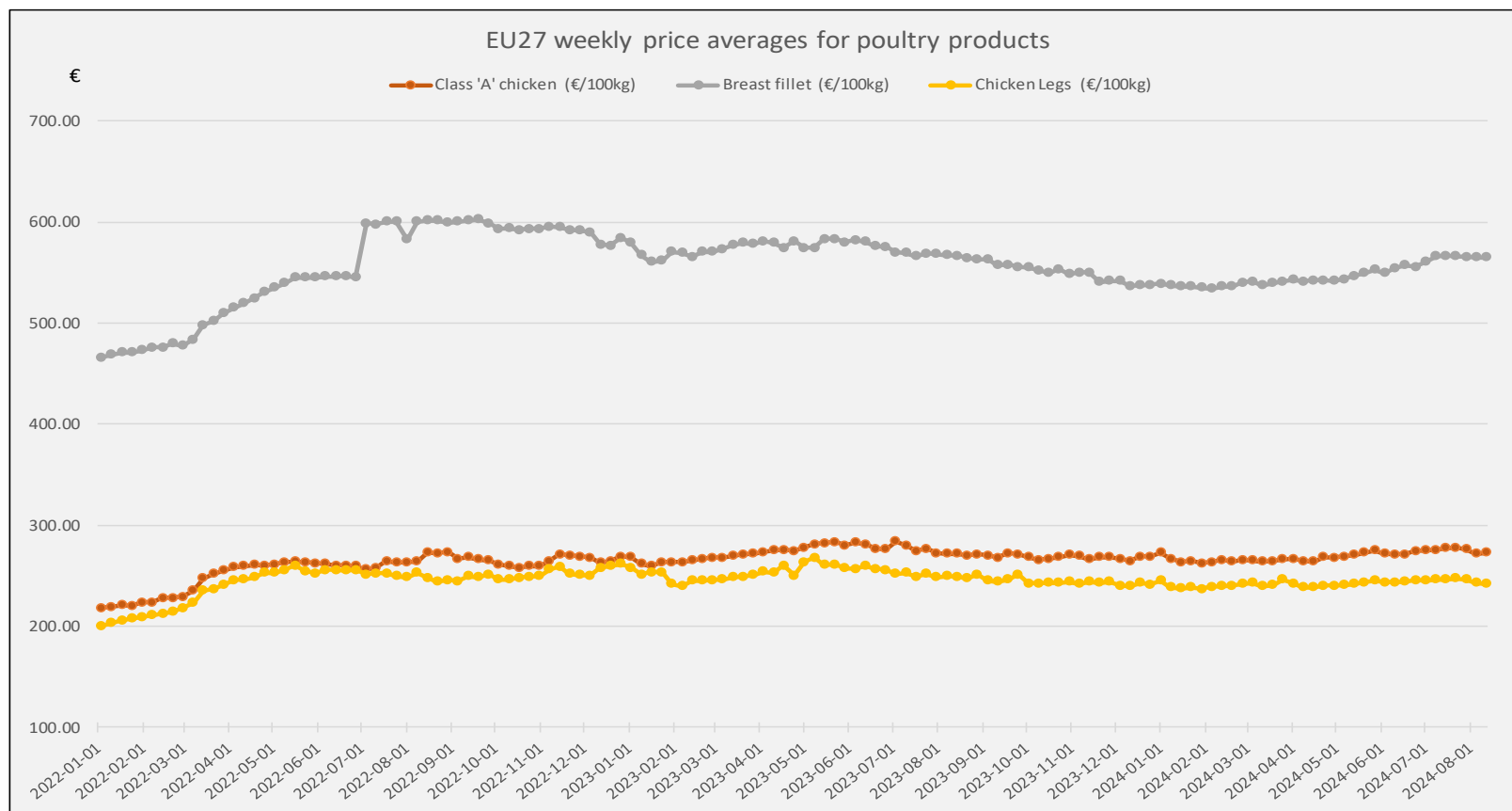


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 33

EU27 weekly price averages for poultry products



Week - 33	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	272.75	565.00	241.93

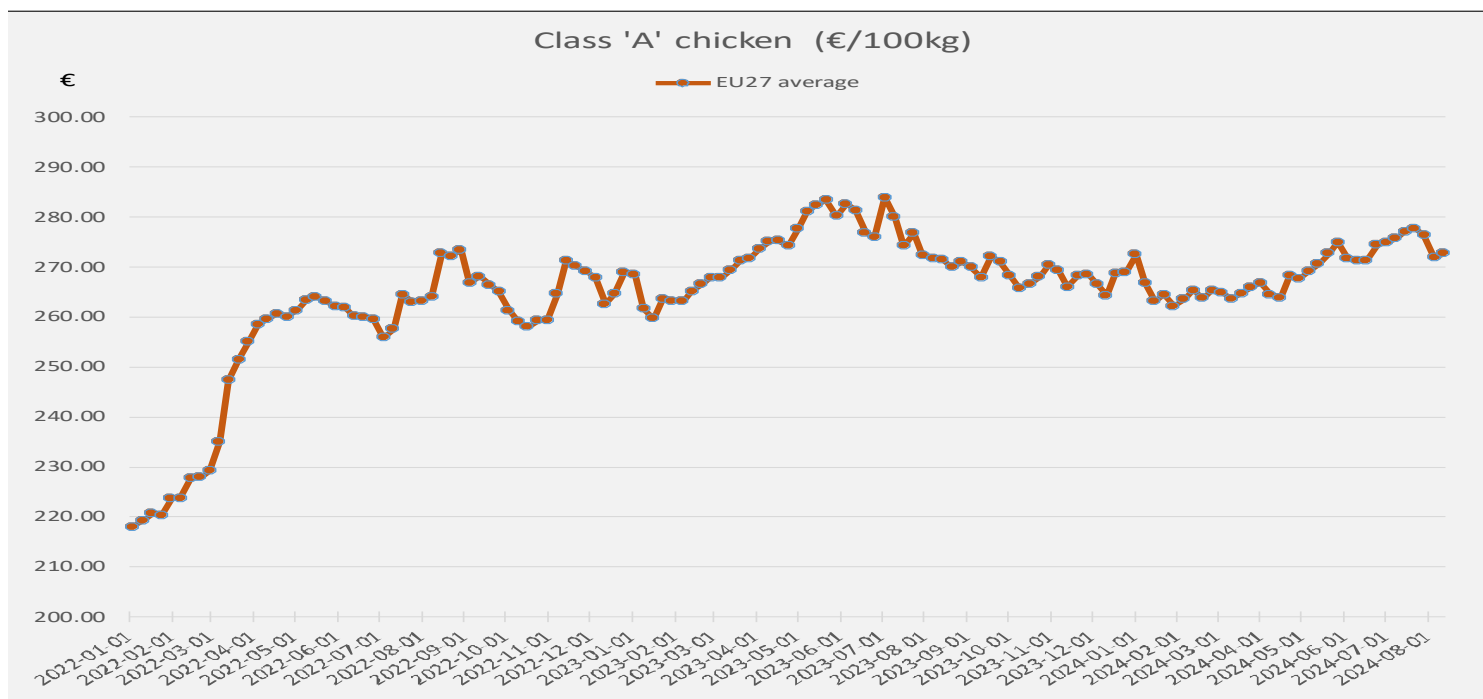
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

29 August 2024

Weekly price of 'Class A Chicken'

Week - 33 Class 'A' chicken



Week - 33	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	272.75	+ 0.3%	- 1.6%	+ 0.5%

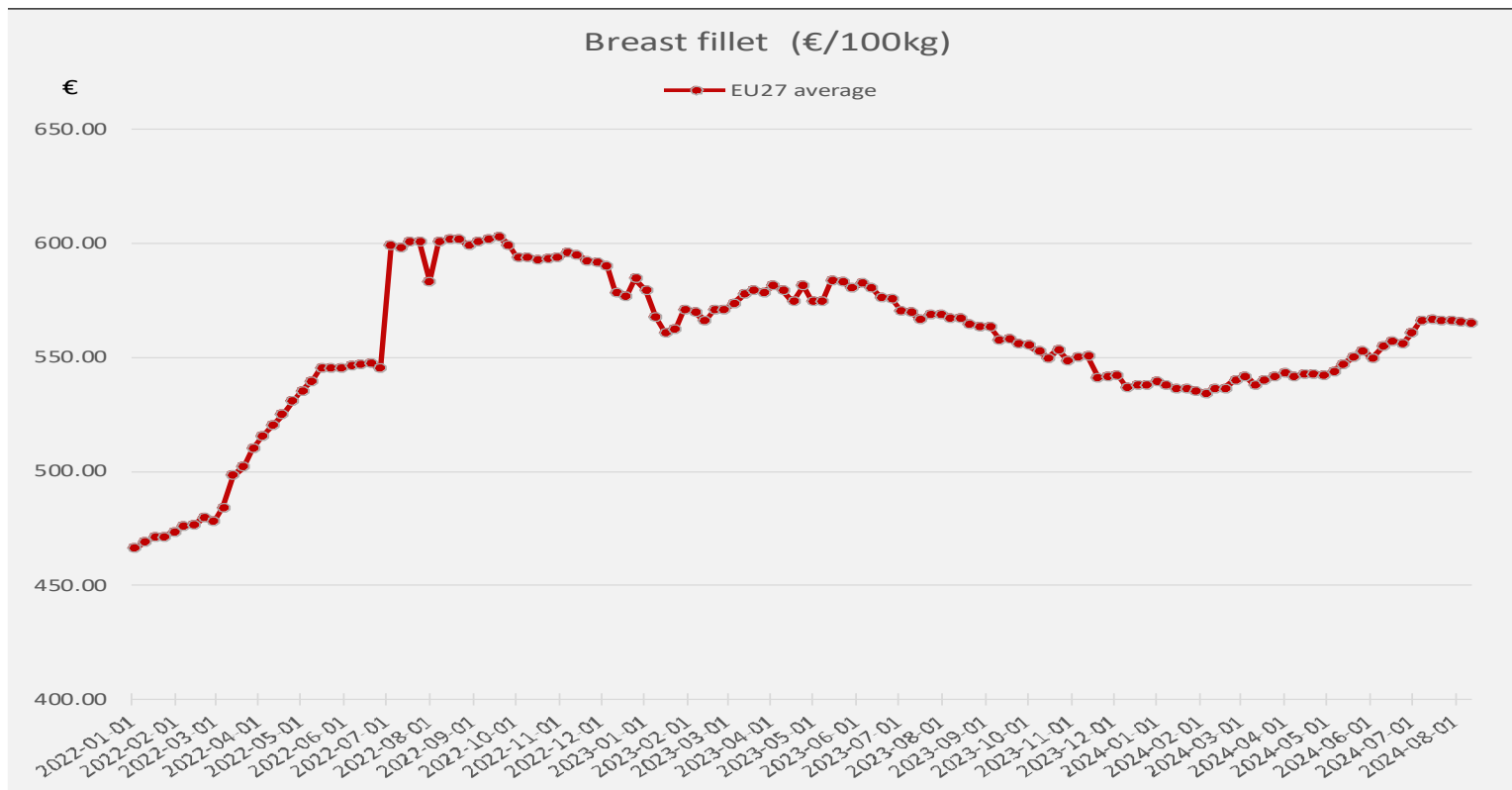
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Breast fillet'

Week - 33 Breast fillet



Week - 33	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	565.00	- 0.1%	- 0.3%	- 0.3%

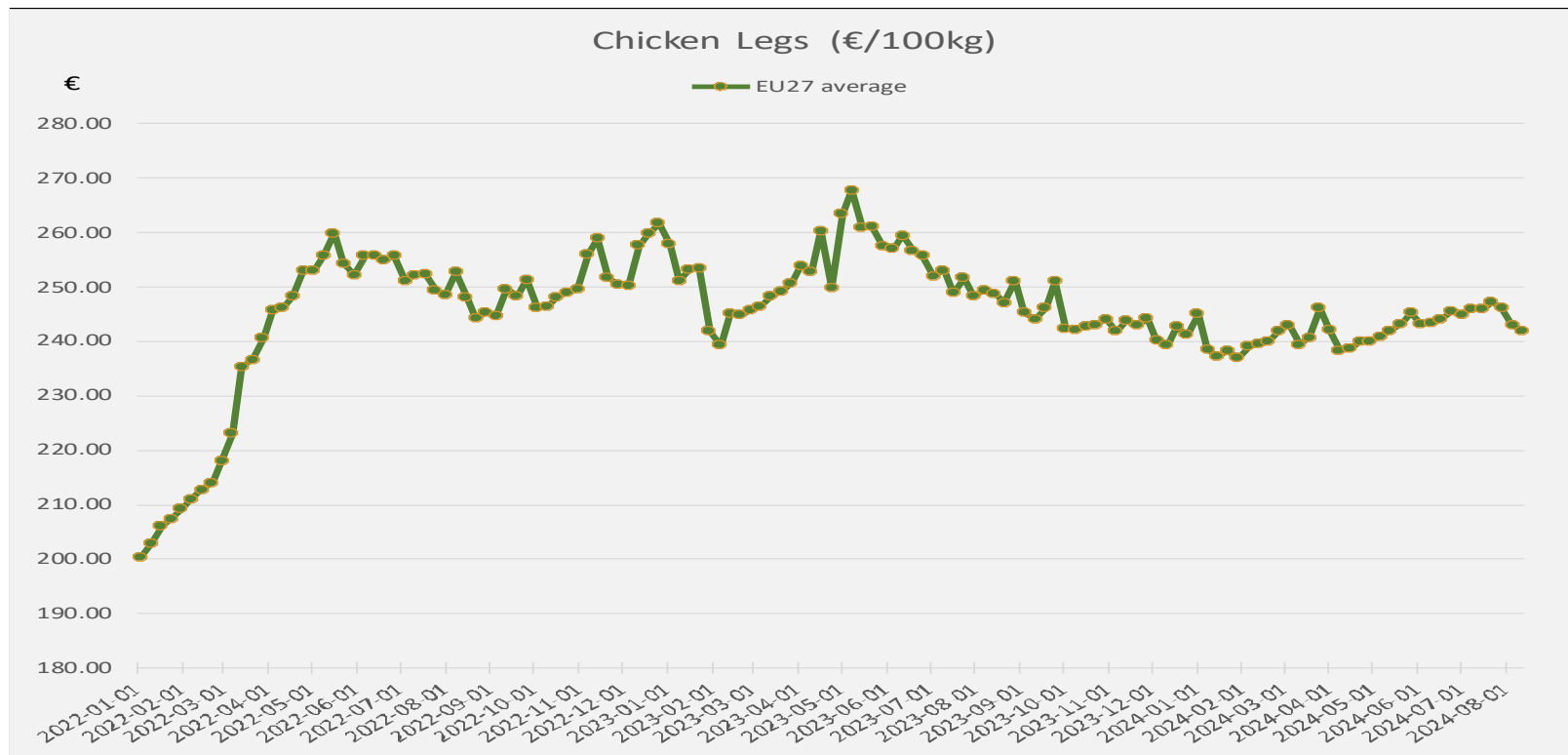
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Chicken legs'

Week - 33 Chicken Legs



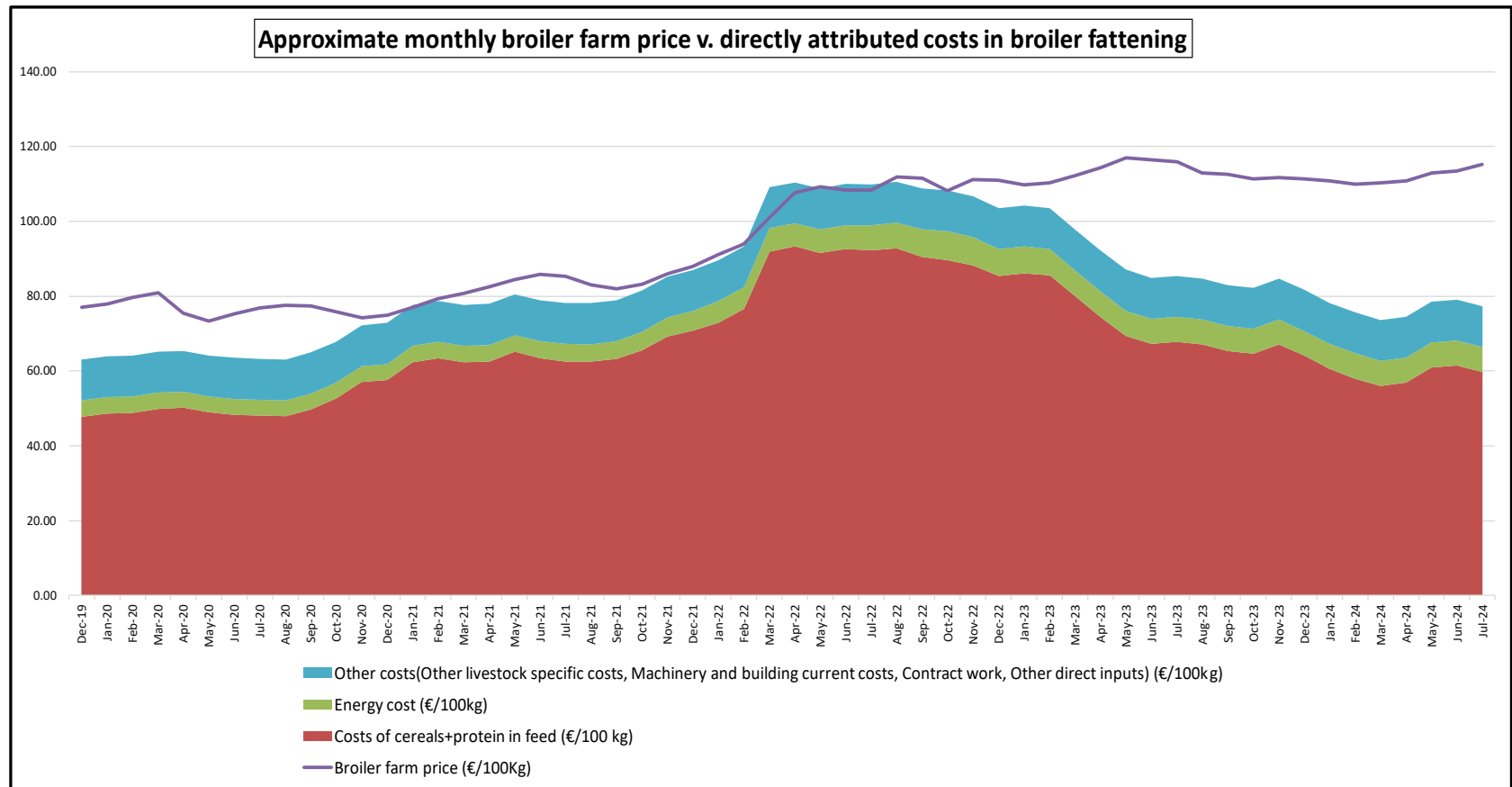
Week - 33	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	241.93	- 0.4%	- 1.6%	- 2.8%

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



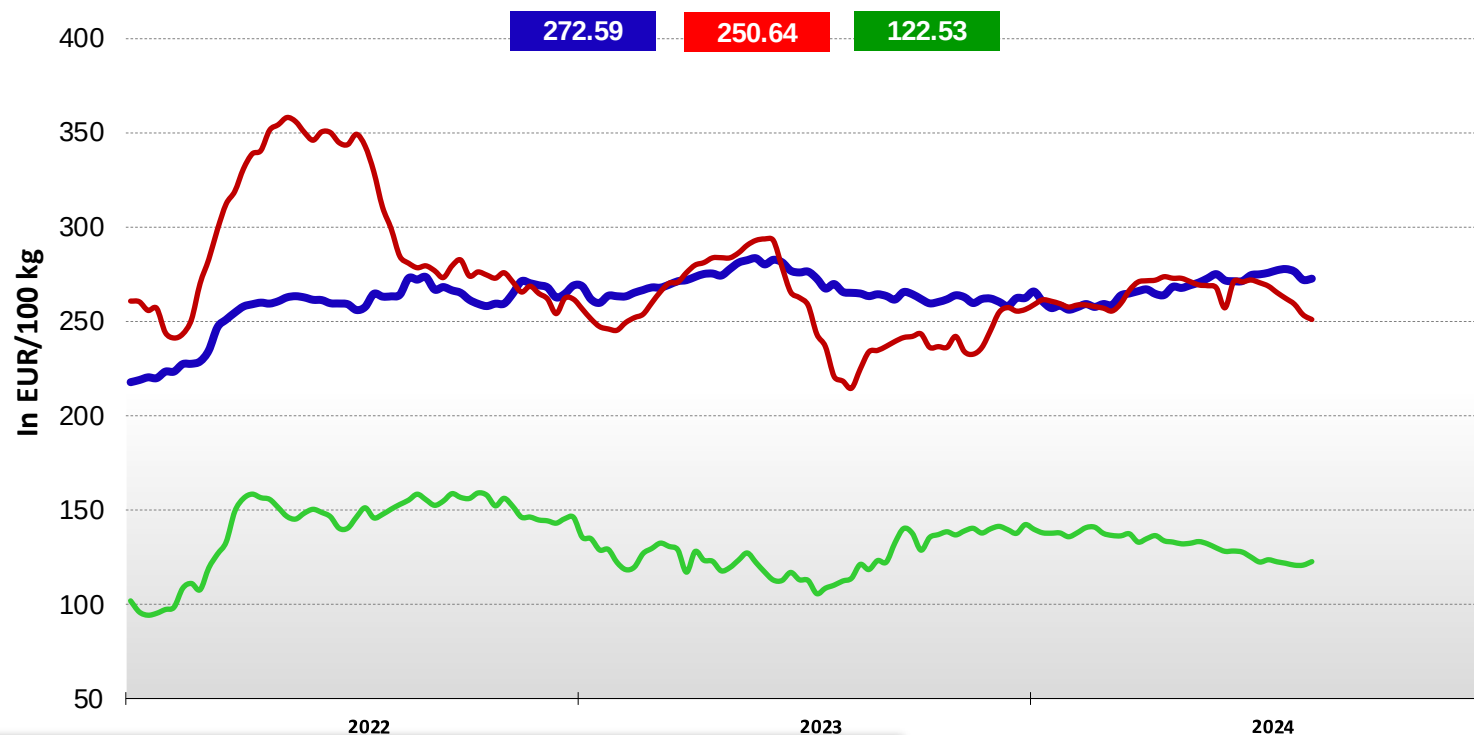
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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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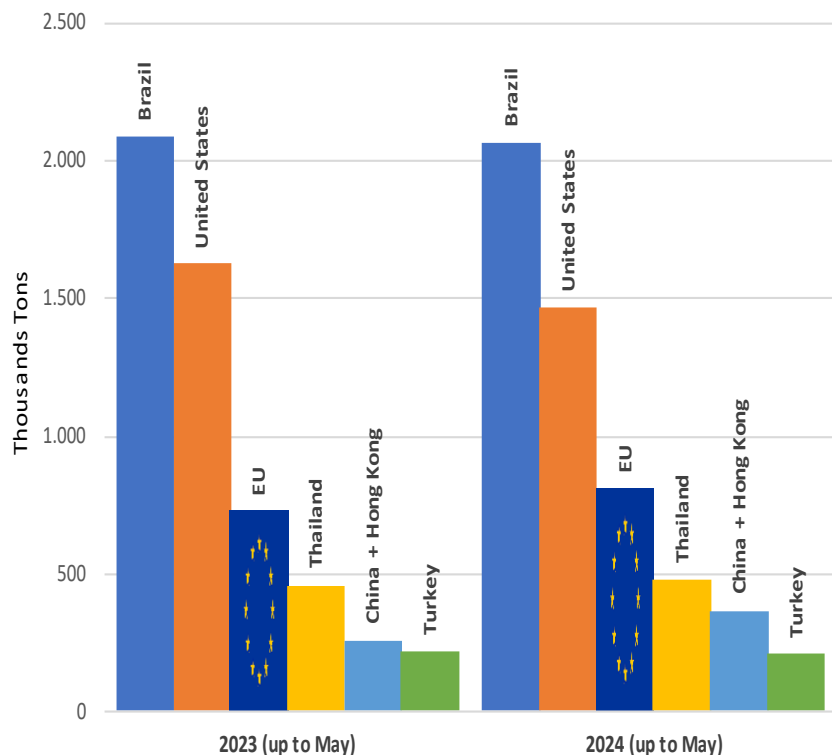
Broiler prices in EU, USA and Brazil



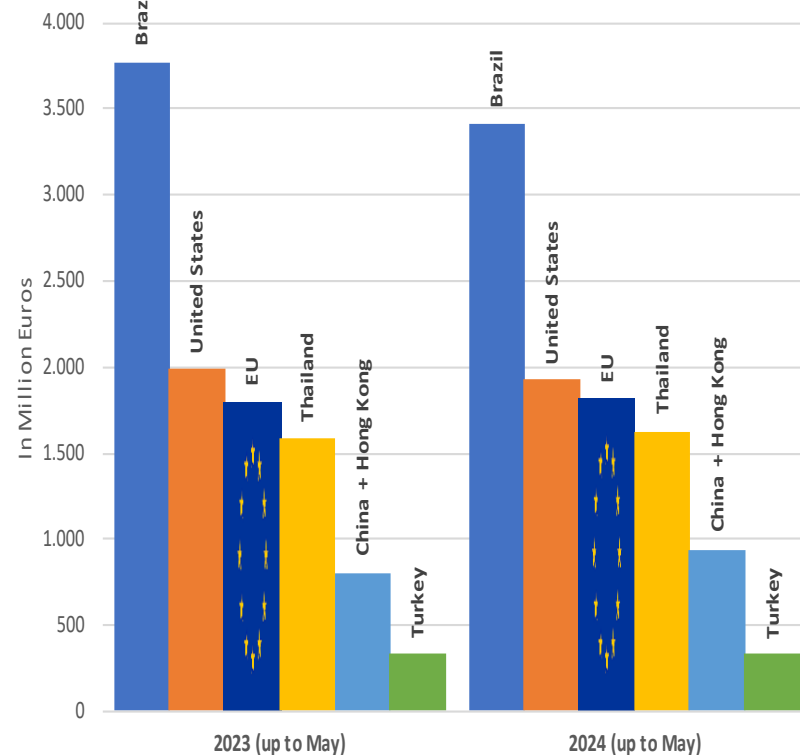
Sources : EU = weighted average of country prices - Broiler 65%
 US = weekly USDA prices - Fresh chicken grade A ,Chicago
 BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

EU US BR

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

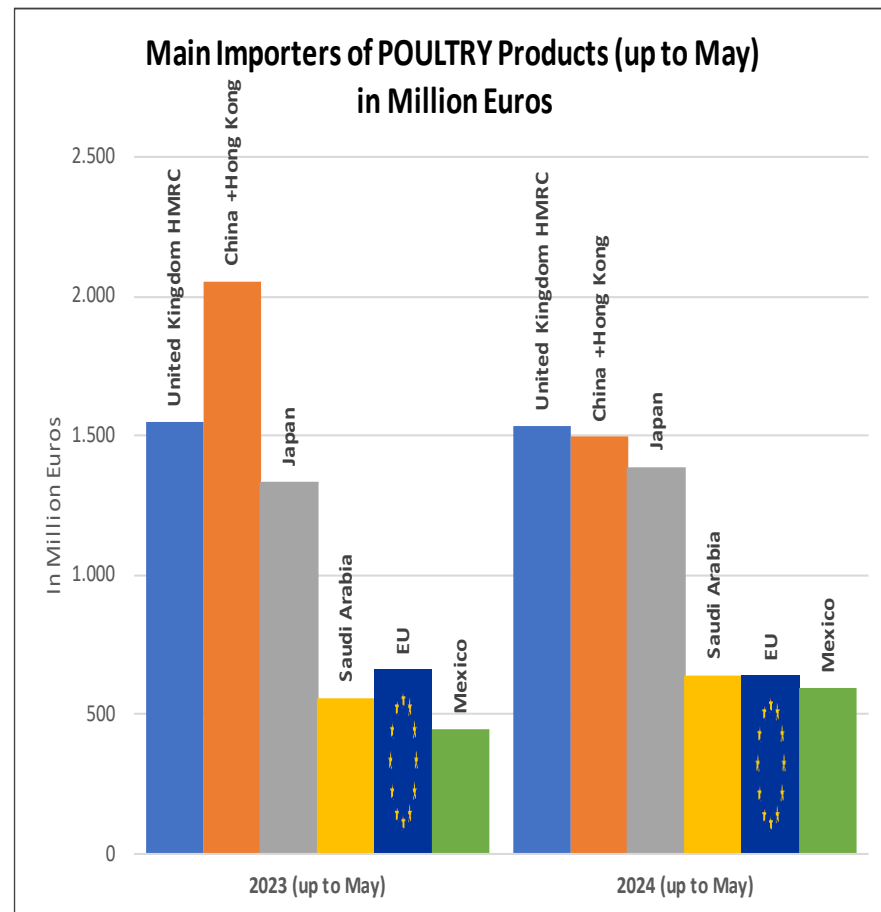
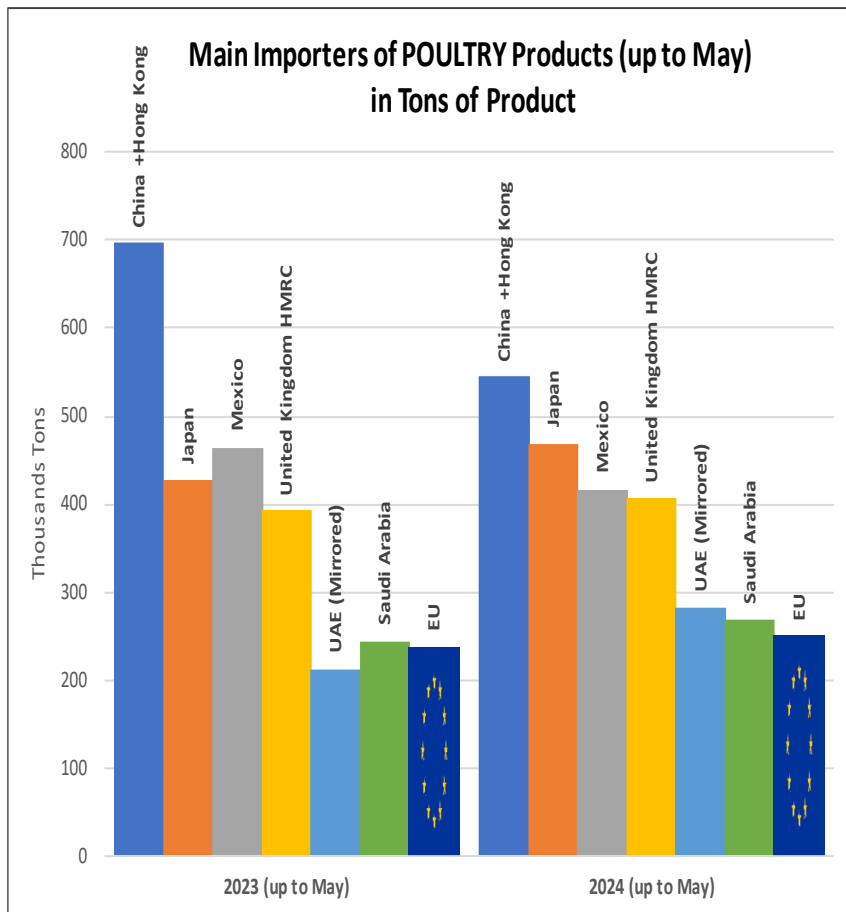


Main Exporters of POULTRY Products (up to May)
in Million Euros



WORLD MARKET

MAIN IMPORTERS



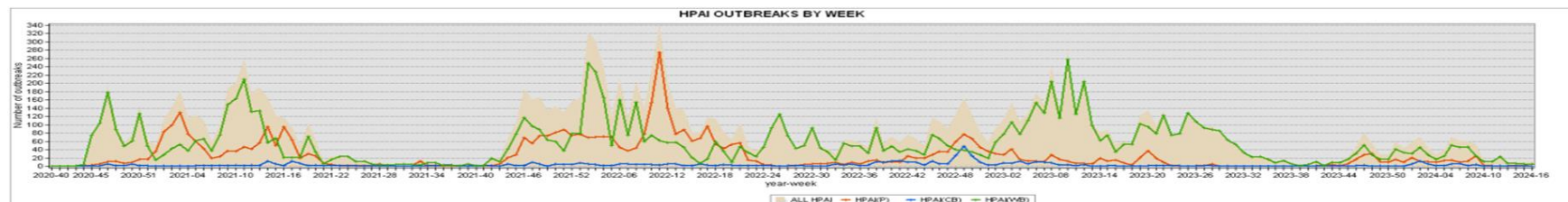
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Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 22/08/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
BG	22	2.111.631	10%	29%
HU	84	1.750.174	36%	24%
PL	34	868.764	15%	12%
DE	32	661.205	14%	9%
FR	11	408.012	5%	6%
SK	7	295.369	3%	4%
DK	13	264.437	6%	4%
CZ	5	208.805	2%	3%
Other MS	23	664.584	10%	9%
Grand Total	231	7.232.981	100,0%	100,0%

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	14	1.064.860	6%	15%
Laying hen	28	1.470.826	12%	20%
Duck	50	1.136.915	22%	16%
Turkey	72	1.643.802	31%	23%
Goose	24	131.616	10%	2%
Guinea fowl	1	17.256	0%	0%
Pheasant	2	9.785	1%	0%
Mixed	10	36.315	4%	1%
No information	30	1.721.606	13%	24%
Grand Total	231	7.232.981	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 carcass weight

	2020		2021		2022		2023		Jan-May 24		Compared to Jan-May 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811 675	32%	725 611	32%	732 508	36%	719 637	37%	311 123	35.6%	+ 4.3%
Ghana	213 838	8%	228 066	10%	156 456	8%	148 745	8%	57 804	6.6%	- 3.7%
Congo (Dem. Rep.)	101 987	4%	139 852	6%	125 421	6%	101 032	5%	43 041	4.9%	+ 22.4%
Saudi Arabia	74 407	3%	58 457	3%	74 590	4%	66 759	3%	34 194	3.9%	+ 37.4%
Vietnam	50 977	2%	31 784	1%	29 751	1%	54 214	3%	33 324	3.8%	+ 97.7%
Ukraine	145 871	6%	162 267	7%	105 810	5%	84 641	4%	26 241	3.0%	- 28.7%
Philippines	195 884	8%	81 155	4%	6 421	0%	4 270	0%	24 215	2.8%	+++
Congo	28 551	1%	30 303	1%	35 562	2%	46 994	2%	22 830	2.6%	+ 56.6%
Uzbekistan	15 520	1%	32 390	1%	34 474	2%	44 821	2%	17 322	2.0%	+ 4.2%
Guinea	28 576	1%	31 324	1%	32 876	2%	33 567	2%	16 542	1.9%	+ 25.0%
<i>Other Destinations</i>	<i>853 465</i>	<i>34%</i>	<i>731 165</i>	<i>32%</i>	<i>696 365</i>	<i>34%</i>	<i>655 469</i>	<i>33%</i>	<i>288 481</i>	<i>33.0%</i>	
Extra-EU	2 520 753		2 252 374		2 030 235		1 960 149		875 117		
% change			- 11%		- 10%		- 3%		+ 12.3%		

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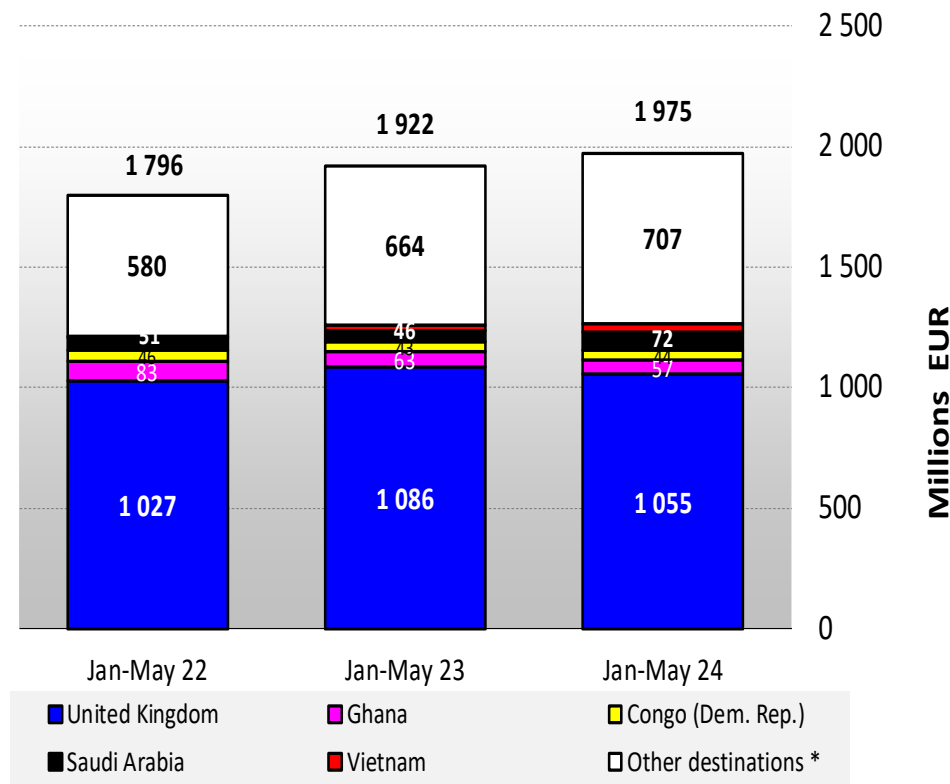
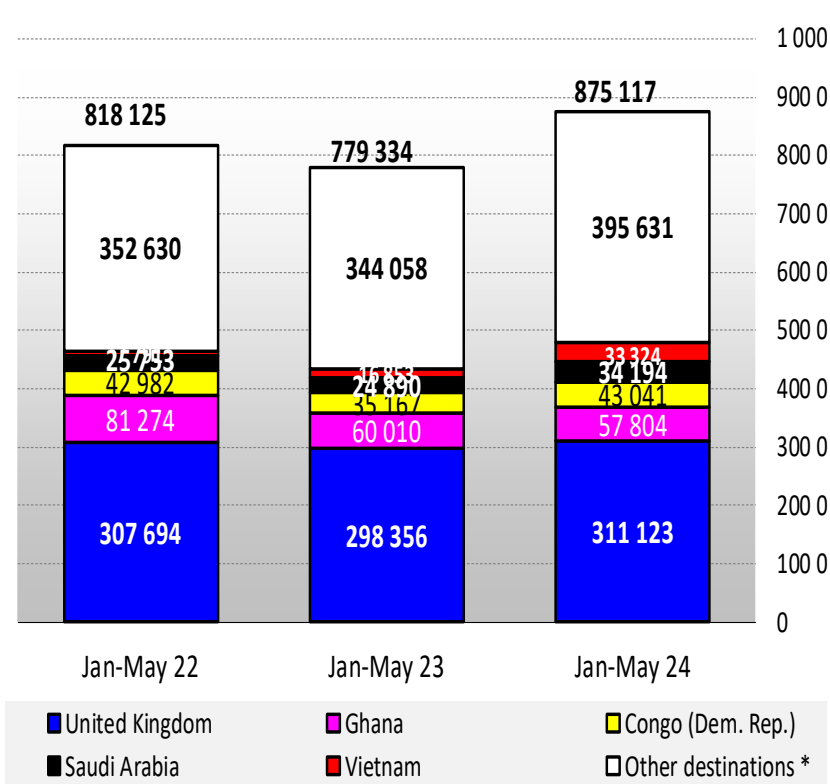
EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan-May 24		Compared to Jan-May 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%	1 054 943	26.9%	- 2.8%
Ghana	172 363	4%	224 103	6%	167 715	4%	156 219	4%	57 360	1.5%	- 8.9%
Congo (Dem. Rep.)	81 033	2%	116 553	3%	145 766	4%	112 070	3%	44 482	1.1%	+ 2.6%
Saudi Arabia	104 518	3%	93 283	2%	159 672	4%	128 774	3%	71 812	1.8%	+ 57.7%
Vietnam	55 251	1%	35 592	1%	39 533	1%	67 637	2%	39 412	1.0%	+ 89.3%
Ukraine	100 109	3%	119 533	3%	102 729	3%	125 704	3%	44 587	1.1%	- 24.4%
Philippines	86 502	2%	57 220	1%	7 793	0%	6 538	0%	13 291	0.3%	+++
Congo	23 311	1%	26 636	1%	36 276	1%	42 993	1%	19 548	0.5%	+ 50.8%
Uzbekistan	14 952	0%	23 945	1%	27 742	1%	35 341	1%	11 586	0.3%	- 14.2%
Guinea	26 028	1%	31 994	1%	43 756	1%	47 220	1%	19 605	0.5%	- 0.2%
<i>Other Destinations</i>	<i>1 274 062</i>	<i>33%</i>	<i>1 233 822</i>	<i>31%</i>	<i>1 352 764</i>	<i>35%</i>	<i>1 428 413</i>	<i>36%</i>	<i>598 428</i>	<i>15.3%</i>	
Extra-EU	3 920 057		3 972 355		4 736 138		4 739 819		1 975 053		
% change			+ 1%		+ 19%		+ 0%		+ 2.8%		

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 44 ('Millions EUR)

29 August 2024

EU-27 Imports of poultry meat from selected origins

In tons of carcass weight

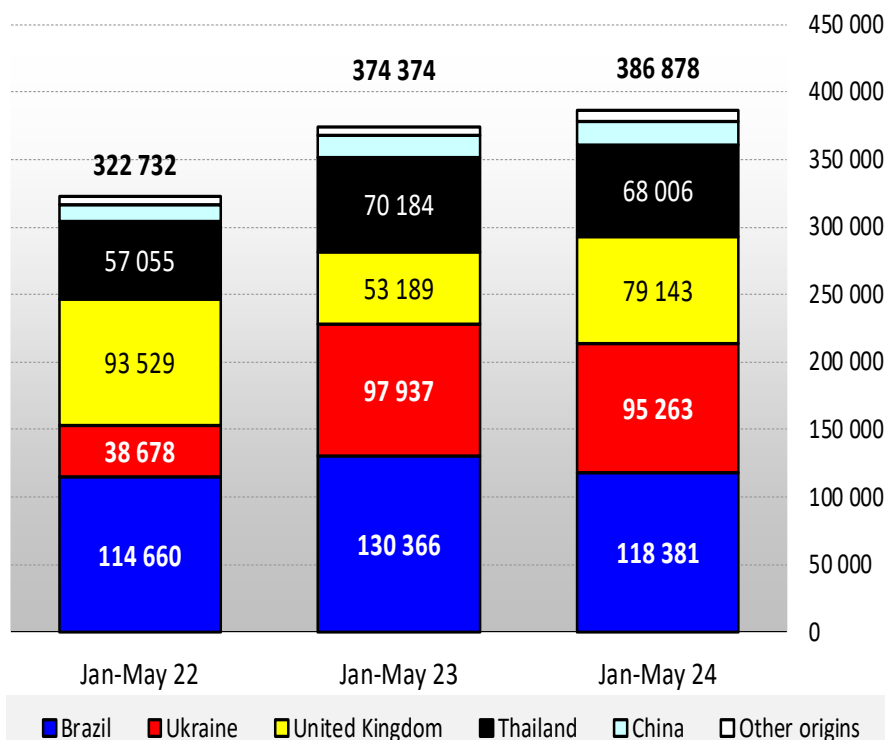
	2020		2021		2022		2023		Jan-May 24		Compared to Jan-May 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227 738	28%	251 887	32%	301 239	35%	290 184	32%	118 381	30.6%	- 9.2%
Ukraine	108 669	14%	102 892	13%	162 837	19%	231 777	26%	95 263	24.6%	- 2.7%
United Kingdom	293 914	37%	274 667	34%	210 851	25%	170 513	19%	79 143	20.5%	+ 48.8%
Thailand	131 374	16%	130 658	16%	131 223	15%	148 602	17%	68 006	17.6%	- 3.1%
China	17 017	2%	20 916	3%	32 864	4%	36 467	4%	17 722	4.6%	+ 9.6%
Chile	14 382	2%	2 441	0%	466	0%	3 238	0%	2 431	0.6%	+++
Argentina	3 273	0%	3 151	0%	4 096	0%	4 086	0%	2 083	0.5%	+ 75.3%
Other Destinations	8 404	1%	10 445	1%	11 076	1%	10 200	1%	3 848	1.0%	
Extra-EU	804 772		797 056		854 651		895 067		386 878		
% change			- 1%		+ 7%		+ 5%		+ 3.3%		

EU-27 Imports of poultry meat from selected origins

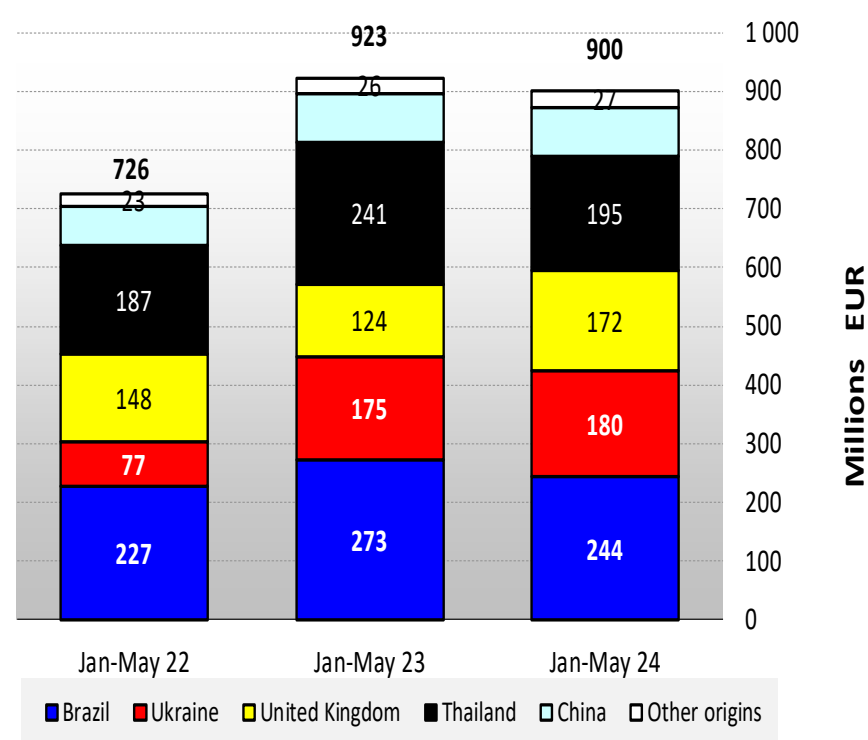
	2020		2021		2022		2023		Jan-May 24		Compared to Jan-May 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351 277	24%	388 472	29%	669 772	31%	598 053	28%	243 524	27.1%	- 10.8%
Ukraine	132 740	9%	166 208	12%	324 836	15%	417 899	20%	179 914	20.0%	+ 3.0%
United Kingdom	501 768	34%	327 273	24%	368 062	17%	353 940	17%	171 523	19.1%	+ 37.8%
Thailand	316 860	22%	317 487	24%	519 225	24%	489 751	23%	195 455	21.7%	- 18.8%
China	78 298	5%	95 081	7%	186 175	9%	182 651	9%	82 425	9.2%	- 2.0%
Chile	35 557	2%	6 019	0%	1 537	0%	7 325	0%	5 321	0.6%	+++
Argentina	6 515	0%	6 508	0%	11 463	1%	11 396	1%	4 830	0.5%	+ 27.8%
Norway	5 280	0%	7 914	1%	8 286	0%	8 872	0%	4 128	0.5%	+ 16.3%
Switzerland	6 229	0%	5 300	0%	8 975	0%	6 730	0%	2 750	0.3%	- 14.9%
Bosnia-Herz.	7 809	1%	10 345	1%	10 728	1%	9 362	0%	4 953	0.6%	+ 20.8%
<i>Other Destinations</i>	16 429	1%	15 466	1%	18 949	1%	19 805	1%	5 368	0.6%	
Extra-EU	1 458 760		1 346 074		2 128 008		2 105 783		900 192		
% change			- 8%		+ 58%		- 1%		- 2.5%		

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

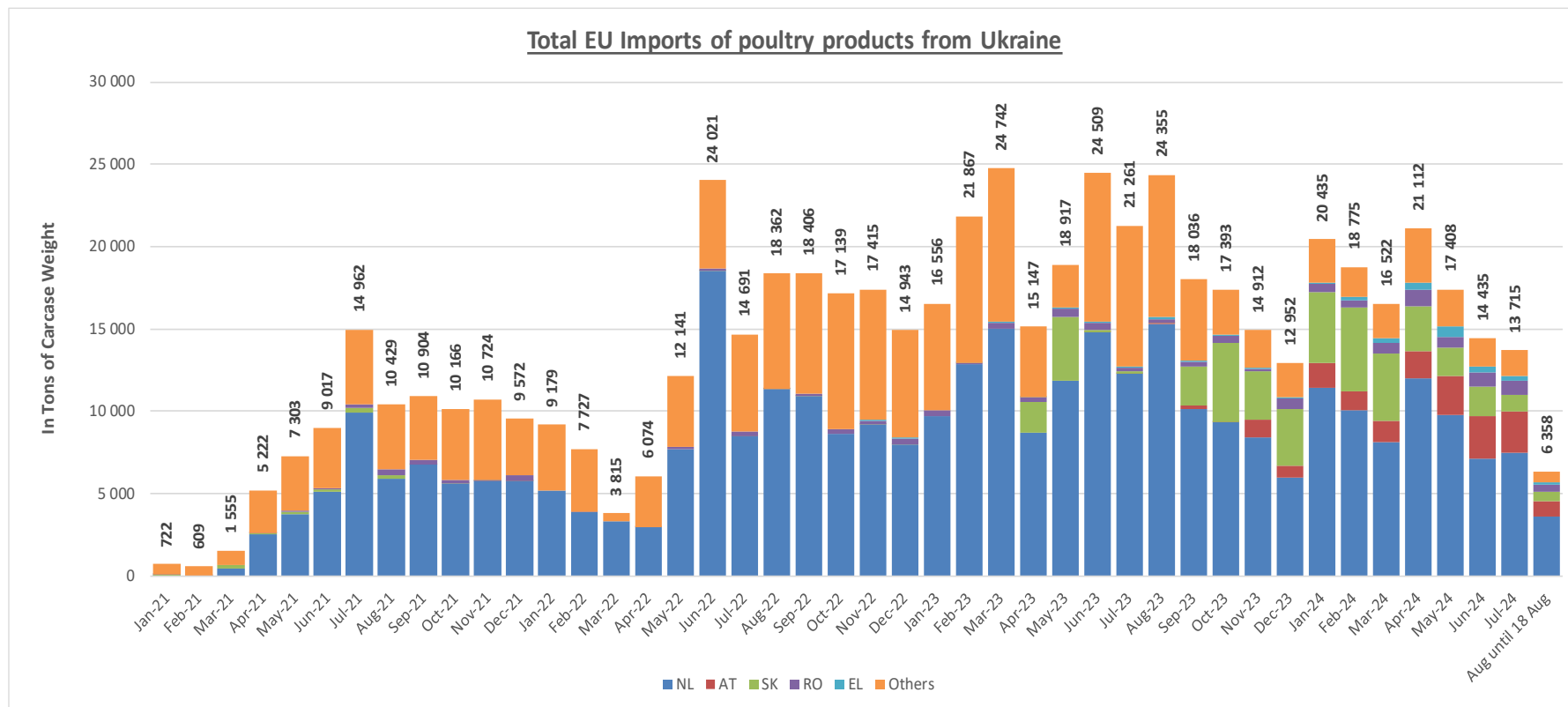


EU IMPORTS of Poultry Meat (Millions EUR)



29 August 2024

EU-27 Imports of poultry meat from Ukraine



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

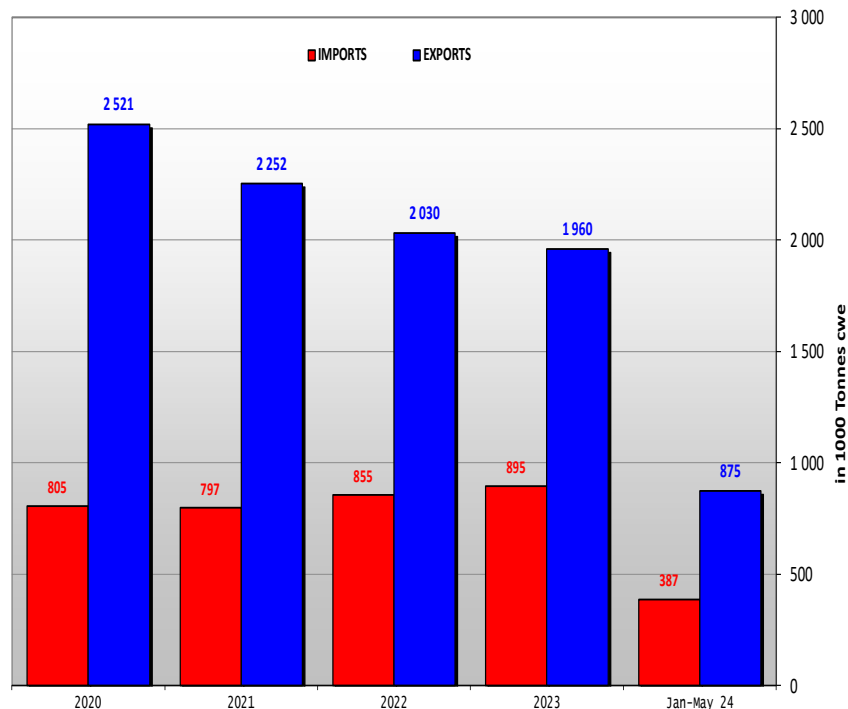
Please note that data is not completely stabilized for most recent periods.

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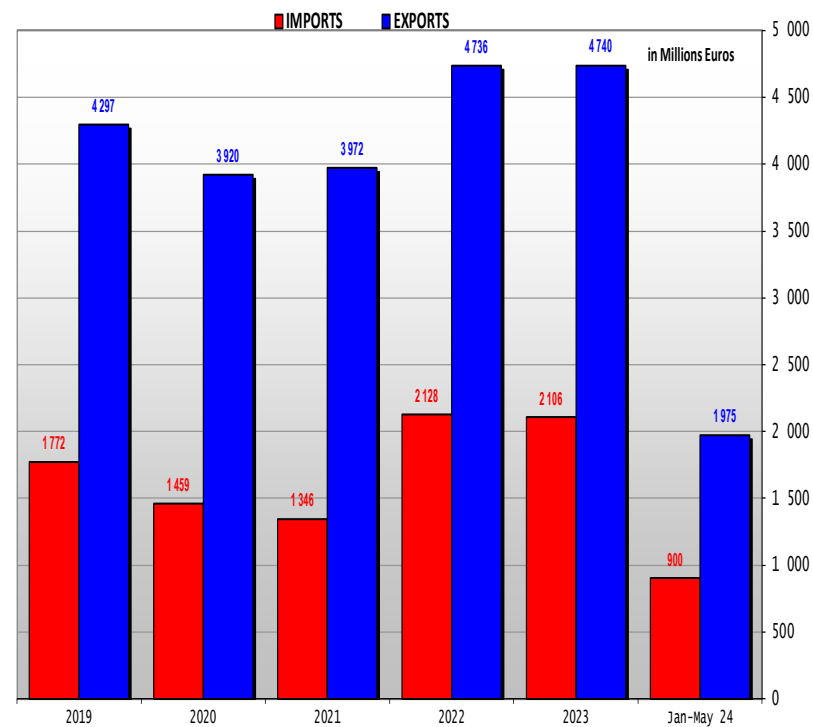
TRADE

BALANCE

in 1000 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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