

EU Market Situation for Poultry



Expert Group for Agricultural Markets

12 December 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

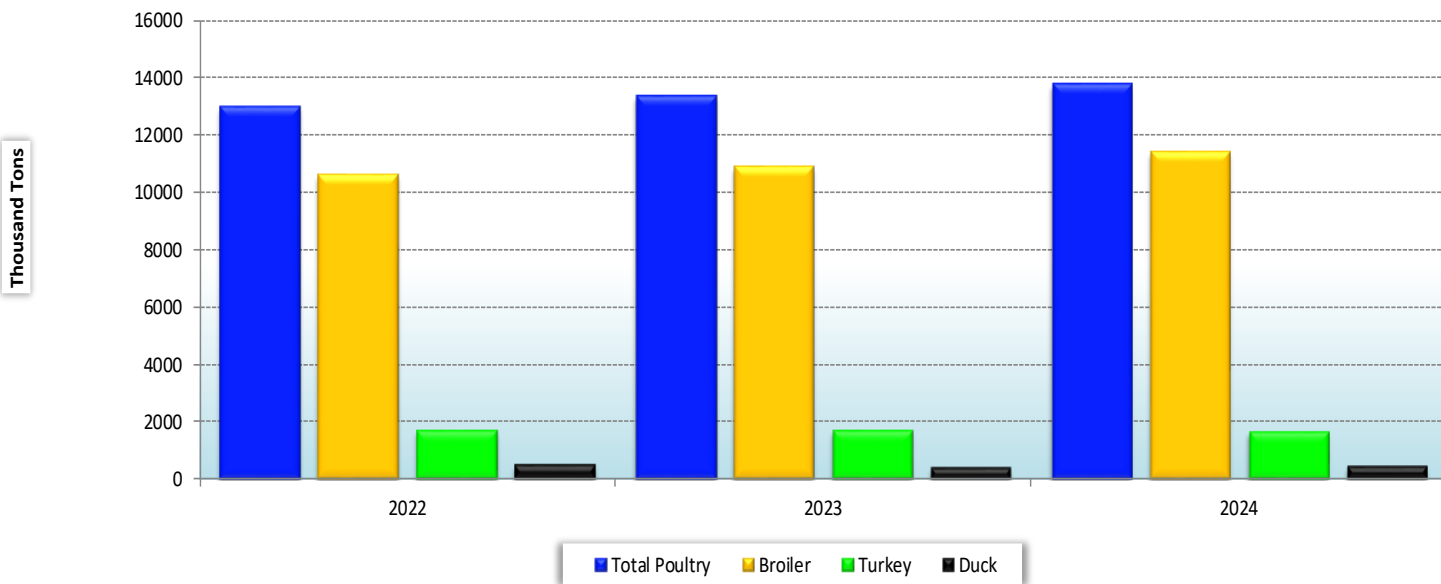
	2022	2023	%2023/2022	trend 2024/2023
DE	406,000	422,000	3.9	↘
PL	409,170	367,310	-10.2	↘
ES	231,590	248,030	7.1	↘
IT	211,130	242,750	15.0	↗
FR	244,920	240,230	-1.9	↗
HU	63,910	56,210	0.0	→
PT	45,650	44,590	-2.3	↗
IE	14,720	16,400	11.4	↗
FI	8,840	8,810	-0.3	↘
BE	0	6,570		↗
SI	5,220	5,590	7.1	↘
SE	4,690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



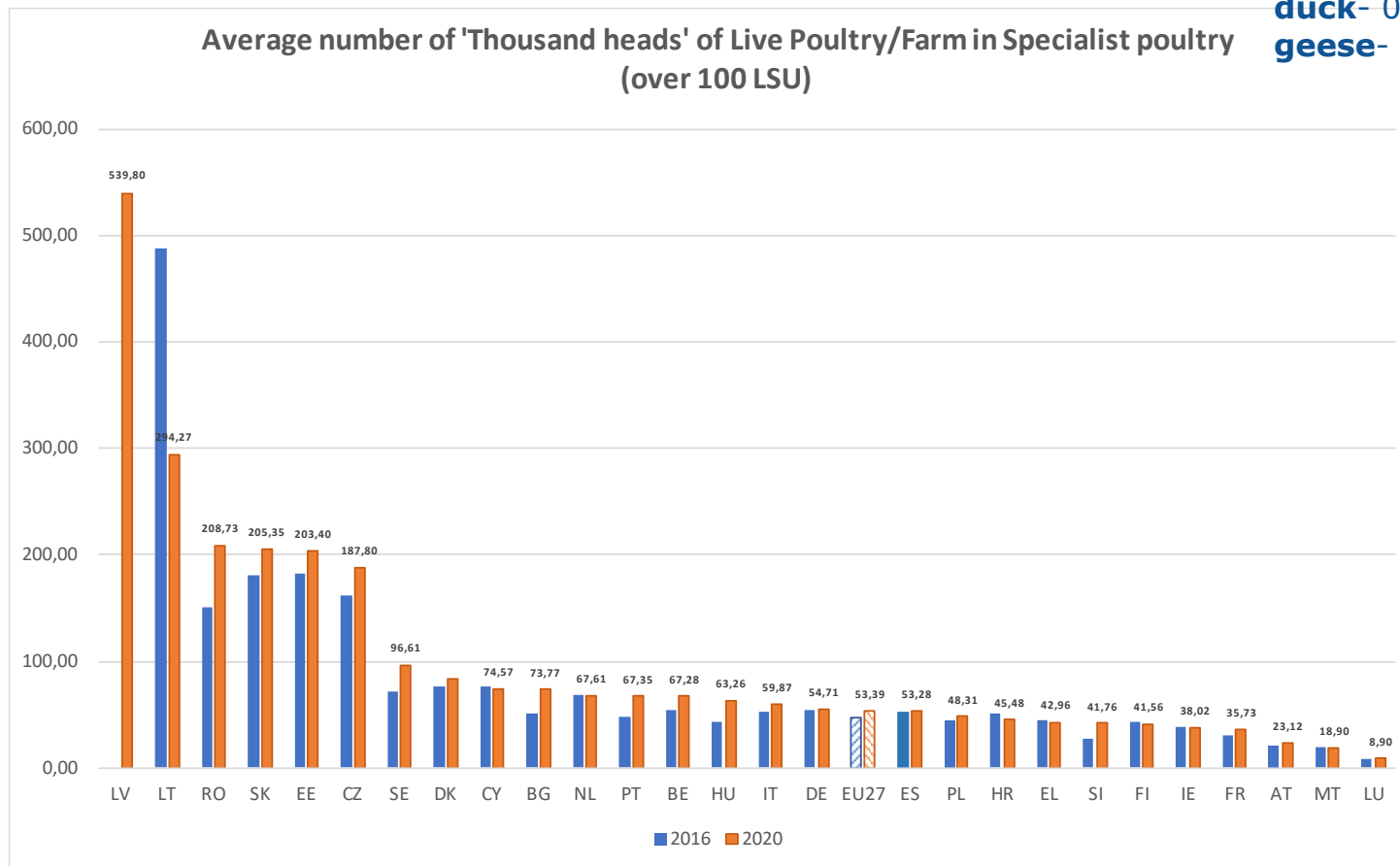
	2022	2023	2024	% 2023/ 2022	% 2024/ 2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* 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

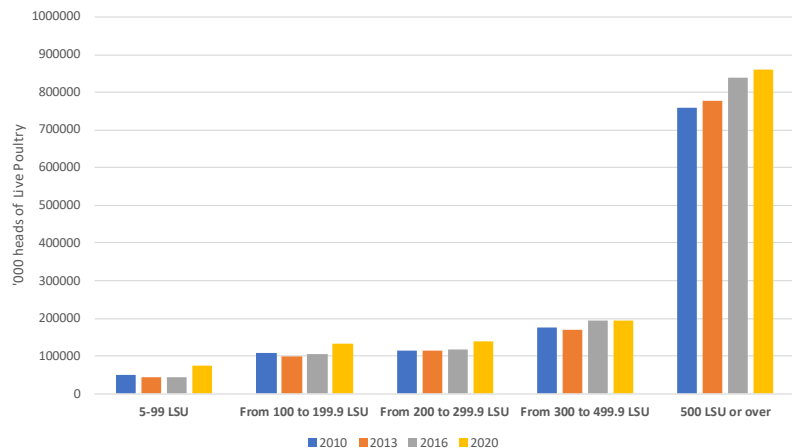


Specialist poultry - EU

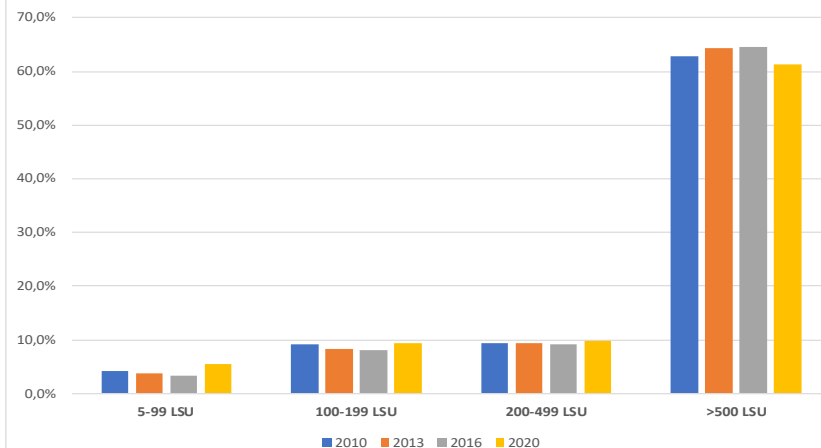
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-7% compared to 2016)
- 14.167.720 LSU in 2020 (-11% compared to 2016)

FARM STRUCTURE SURVEY

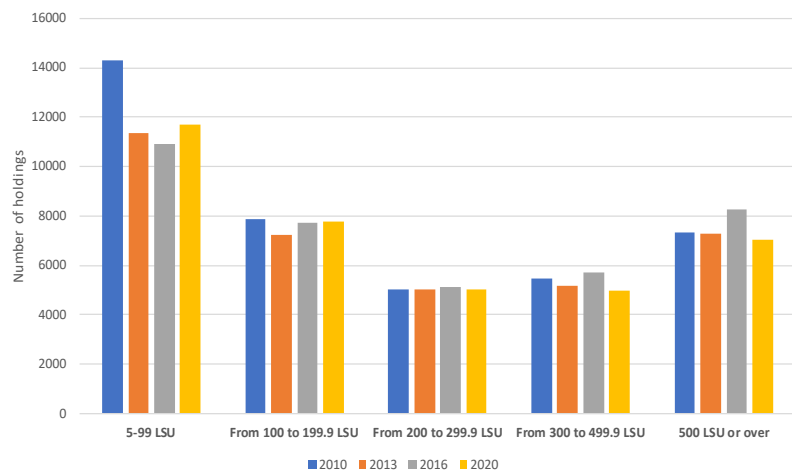
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



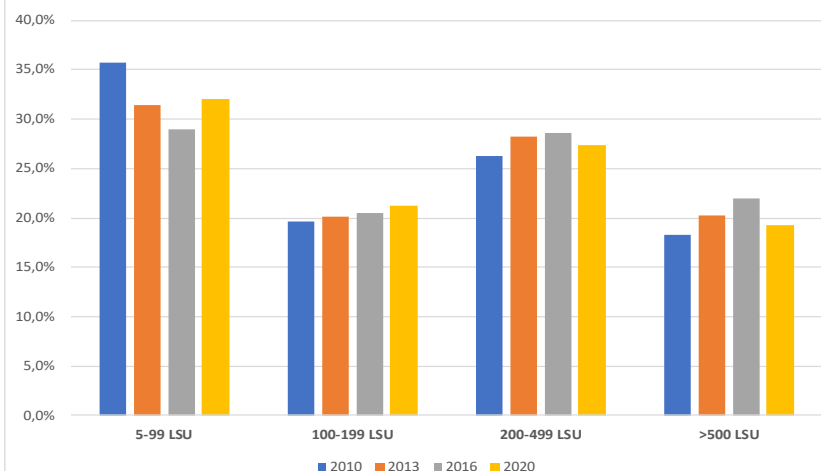
Share of animals by LSU class (over 5 LSU)



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

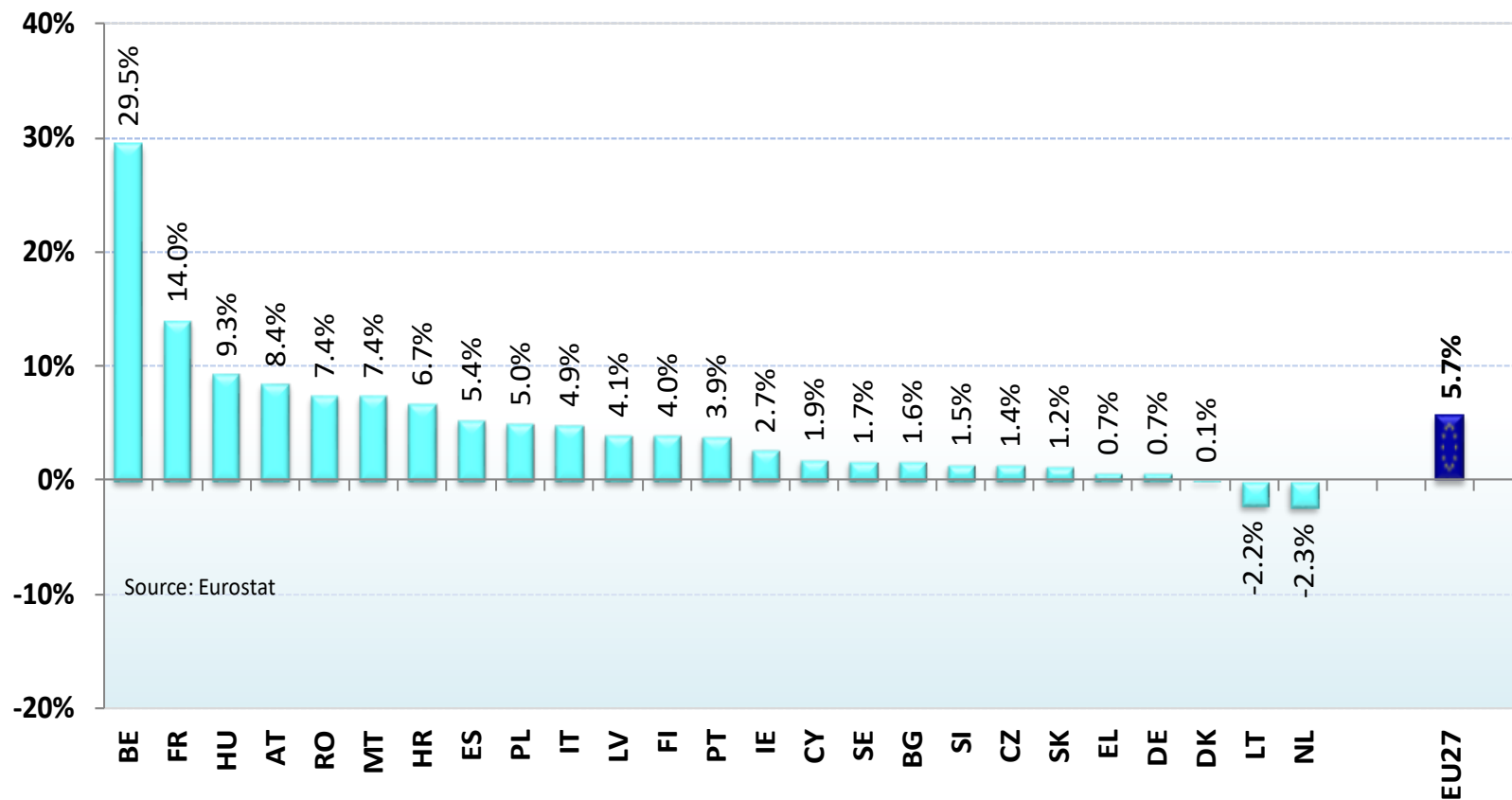


Share of holdings by LSU class (over 5 LSU)



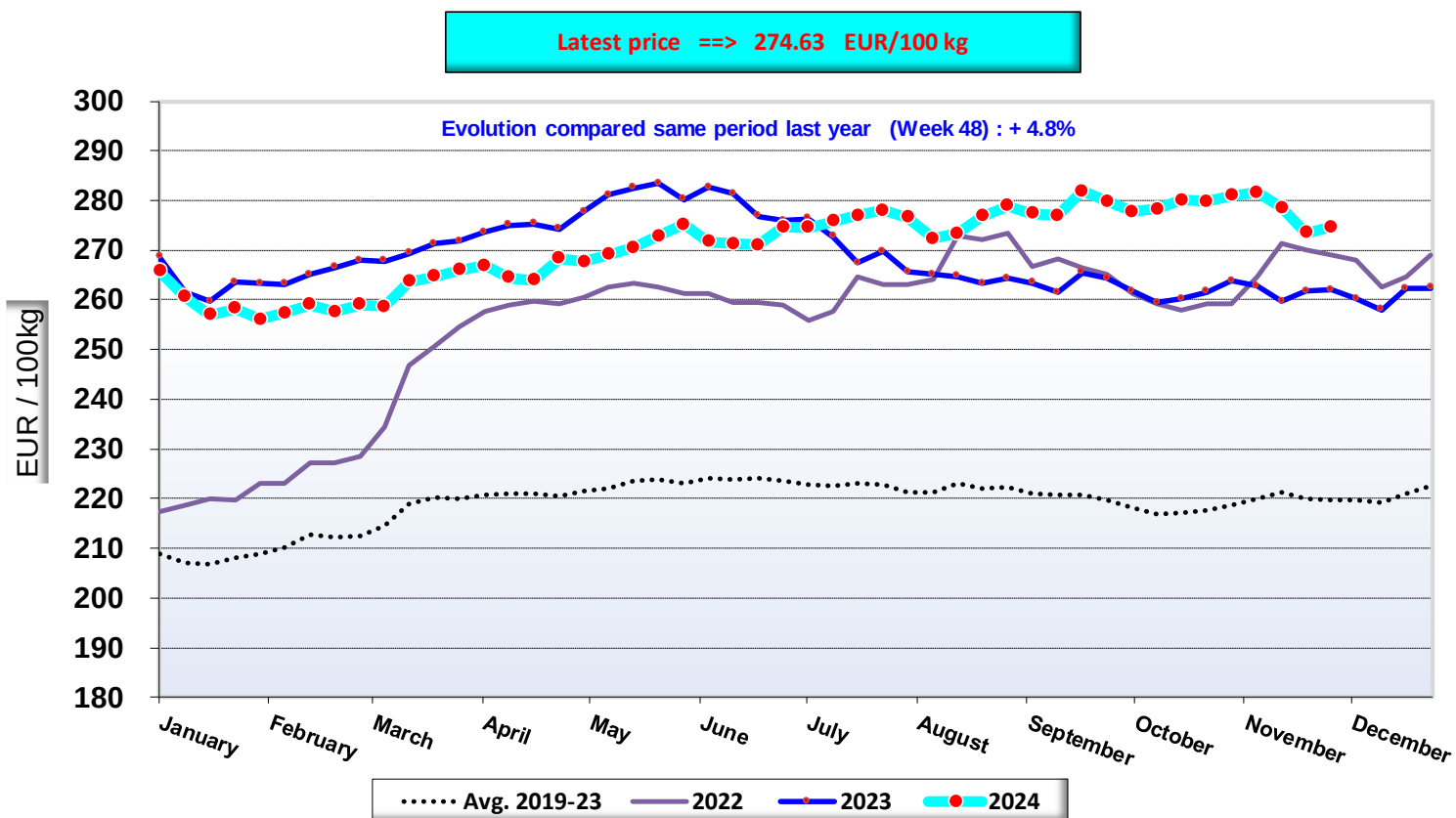
PRODUCTION

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



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

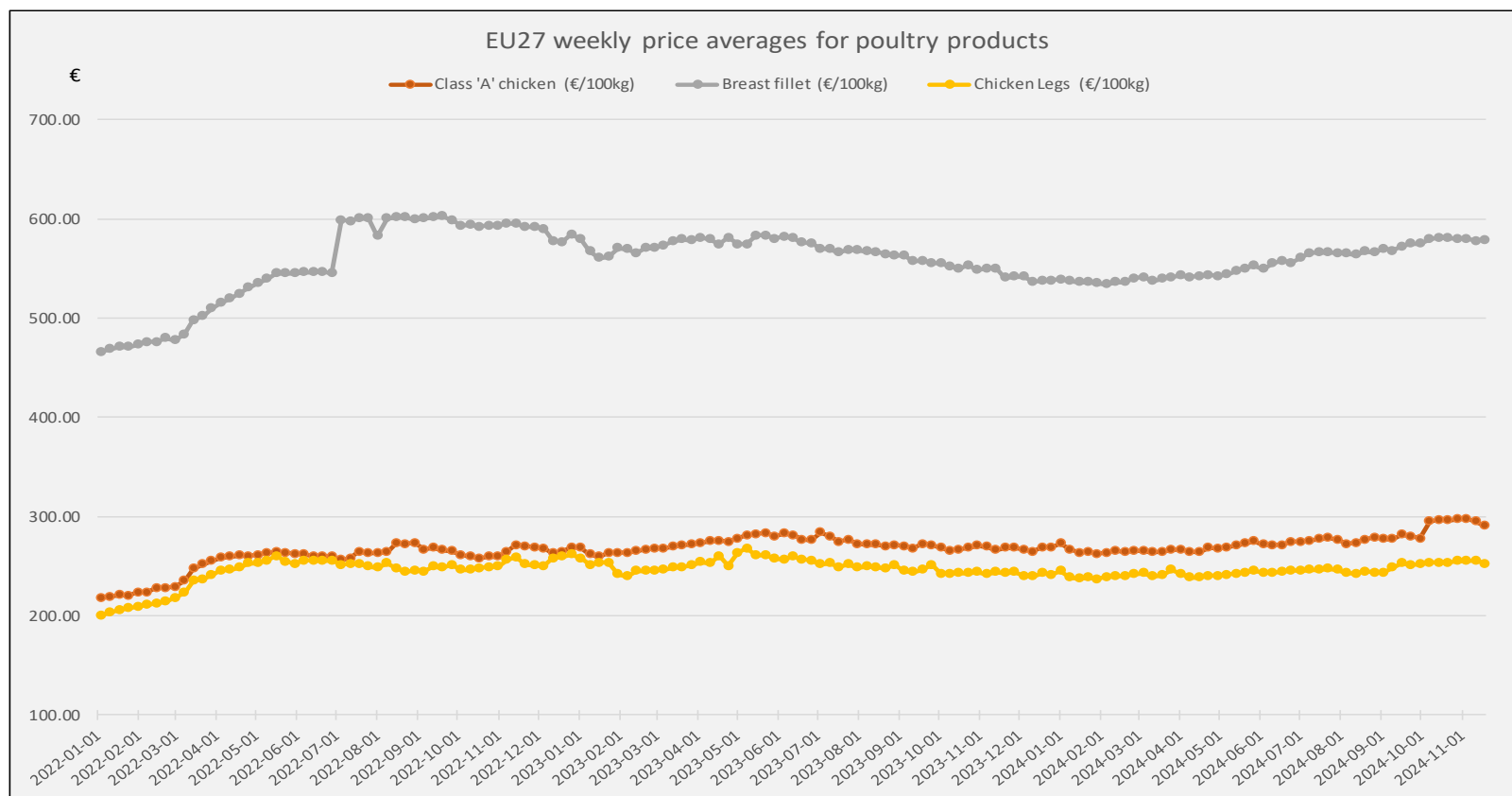


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 47

EU27 weekly price averages for poultry products

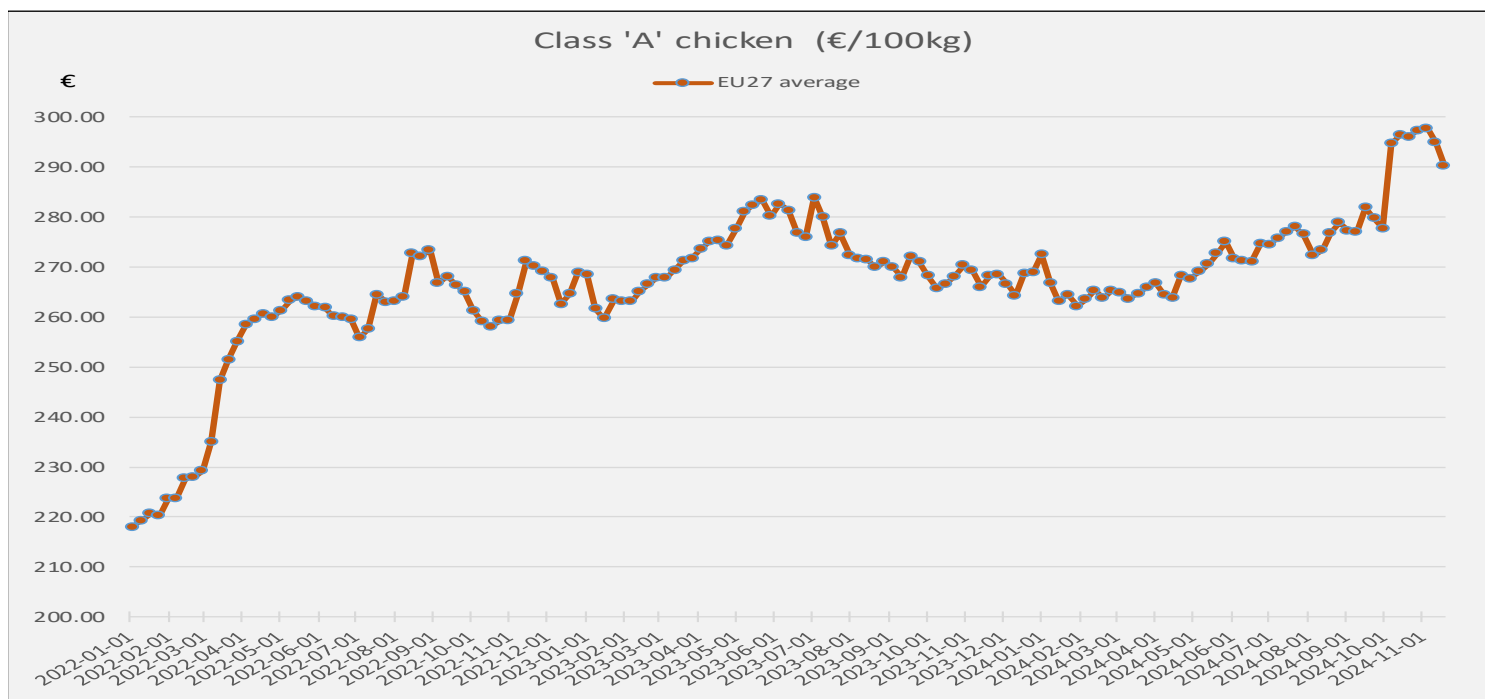


Week - 47	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	290.22	578.75	252.51

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

Weekly price of 'Class A Chicken'

Week - 47 Class 'A' chicken



Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	290.22	- 1.6%	- 2.0%	+ 8.2%

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

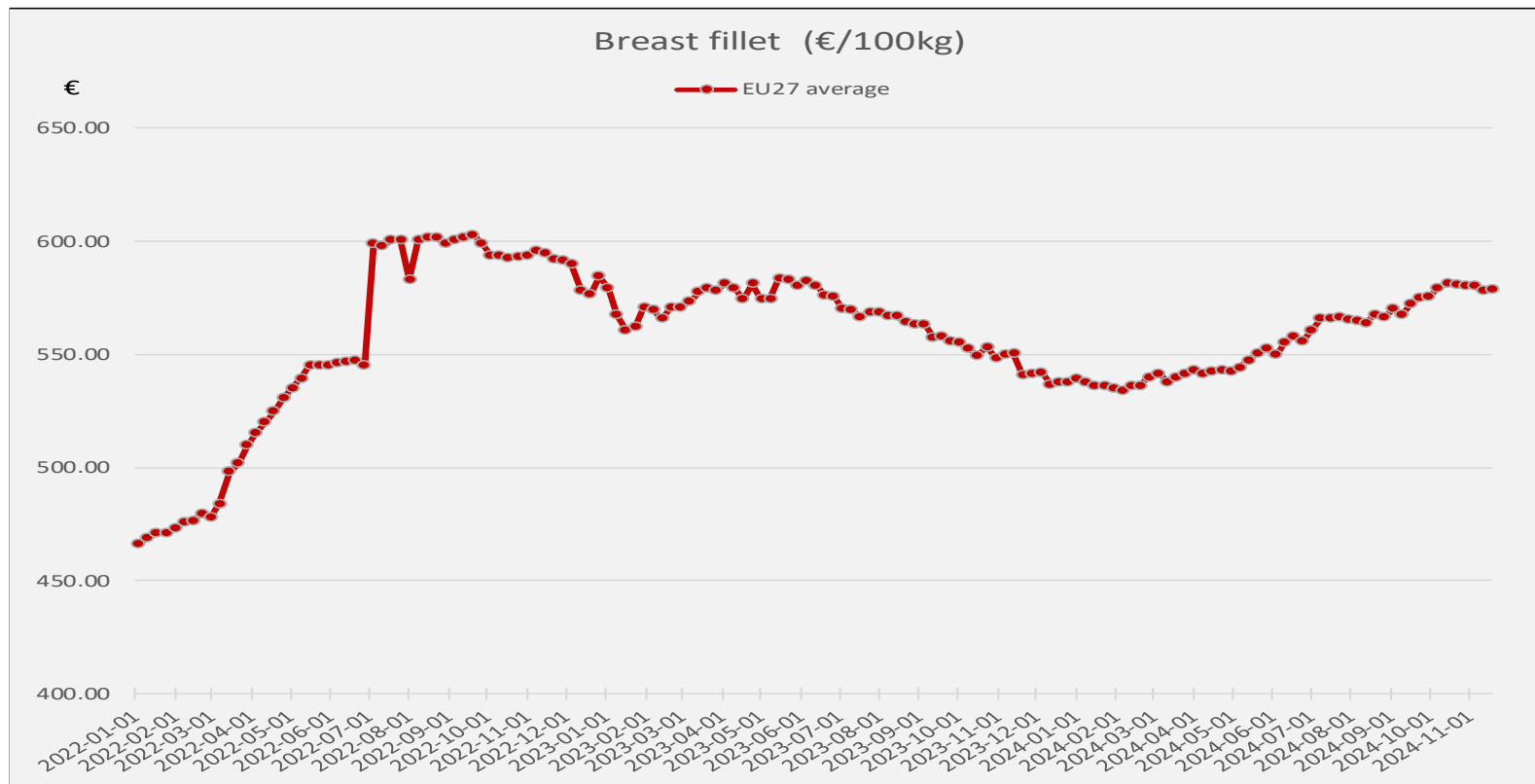
! Prices reported by MS are preliminary and may be subject to change !

12 December 2024

Weekly price of 'Breast fillet'

Week - 47

Breast fillet



Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	578.75	+ 0.1%	- 0.4%	+ 7.0%

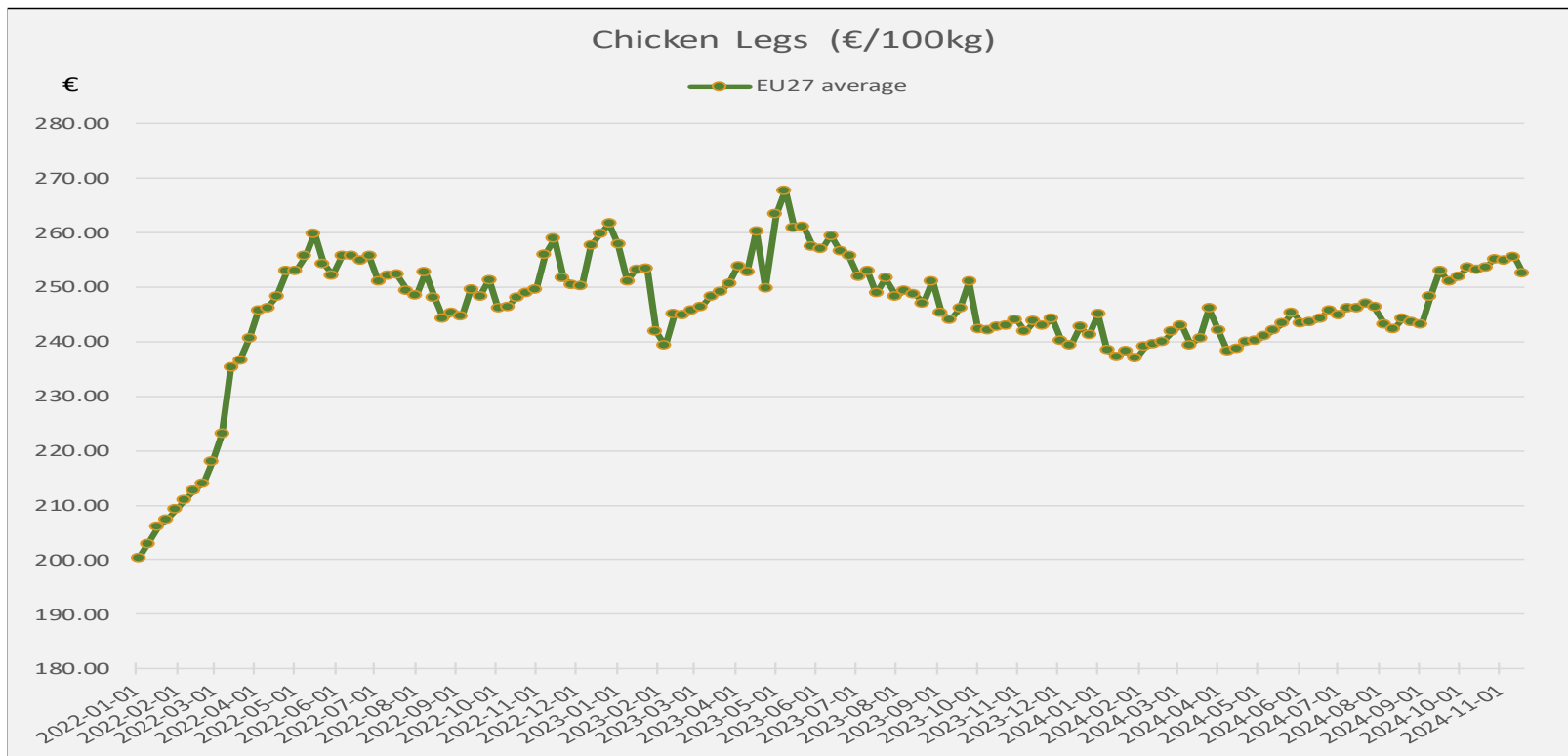
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

12 December 2024

Weekly price of 'Chicken legs'

Week - 47 Chicken Legs



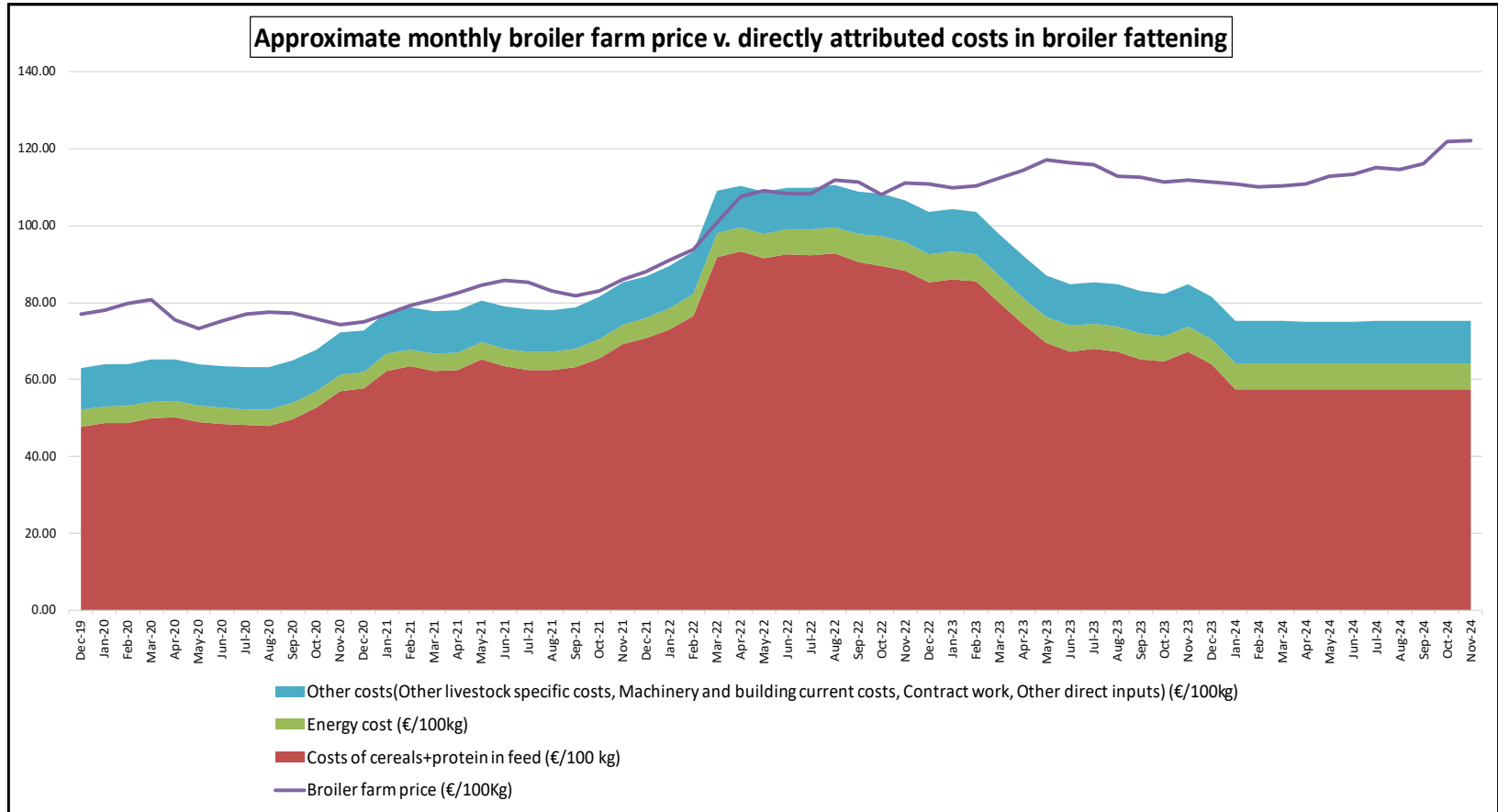
Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	252.51	- 1.2%	- 0.4%	+ 4.0%

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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COST BROILER PRODUCTION

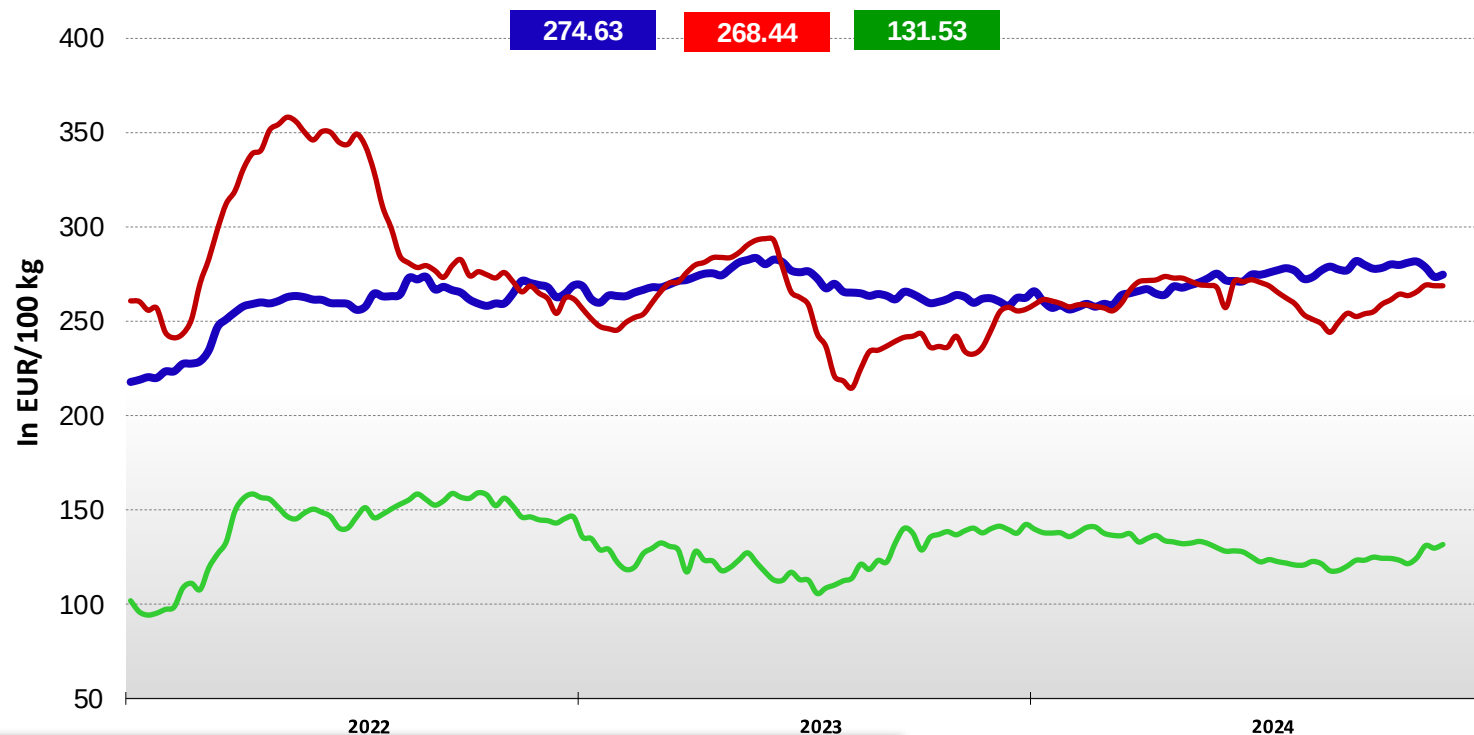


Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

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

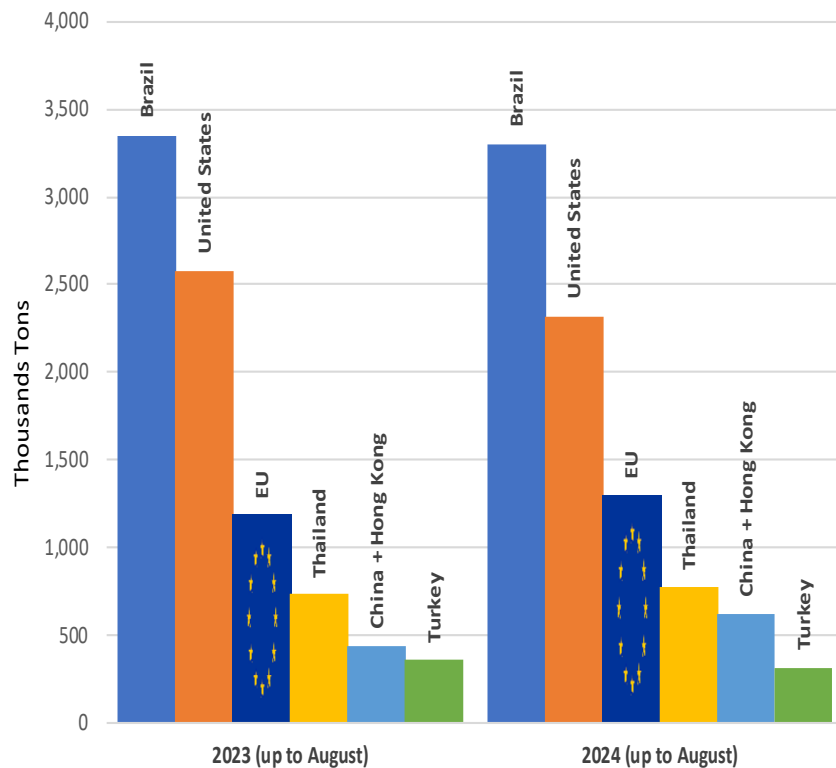
Broiler prices in EU, USA and Brazil



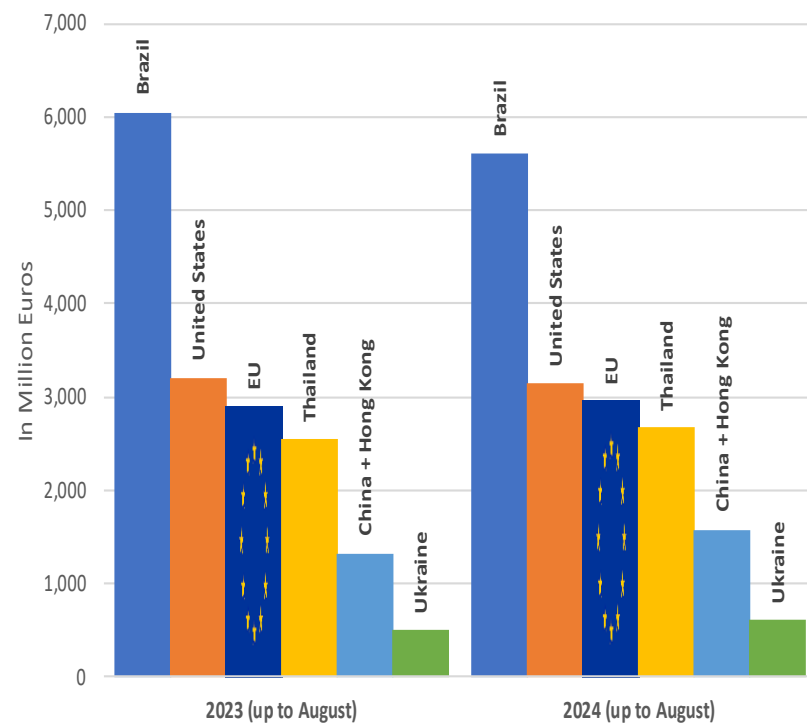
Sources : EU = weighted average of country prices - Broiler 65%
 US = weekly USDA prices - Fresh chicken grade A ,Chicago
 BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

EU US BR

Main Exporters of POULTRY Products (up to August)

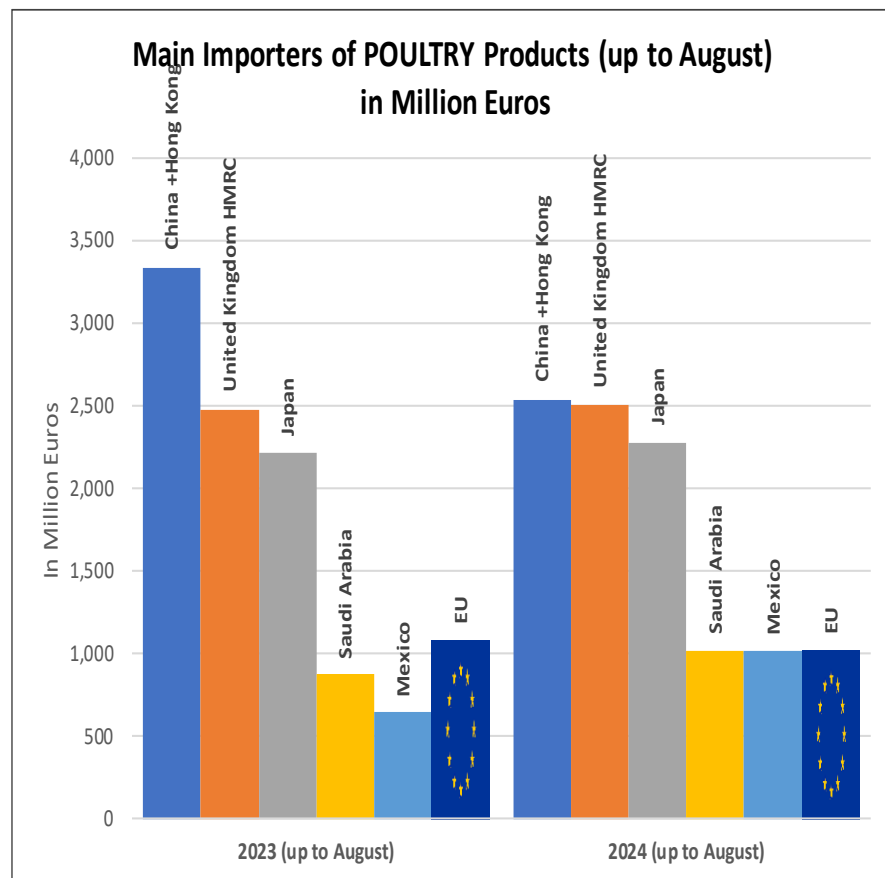
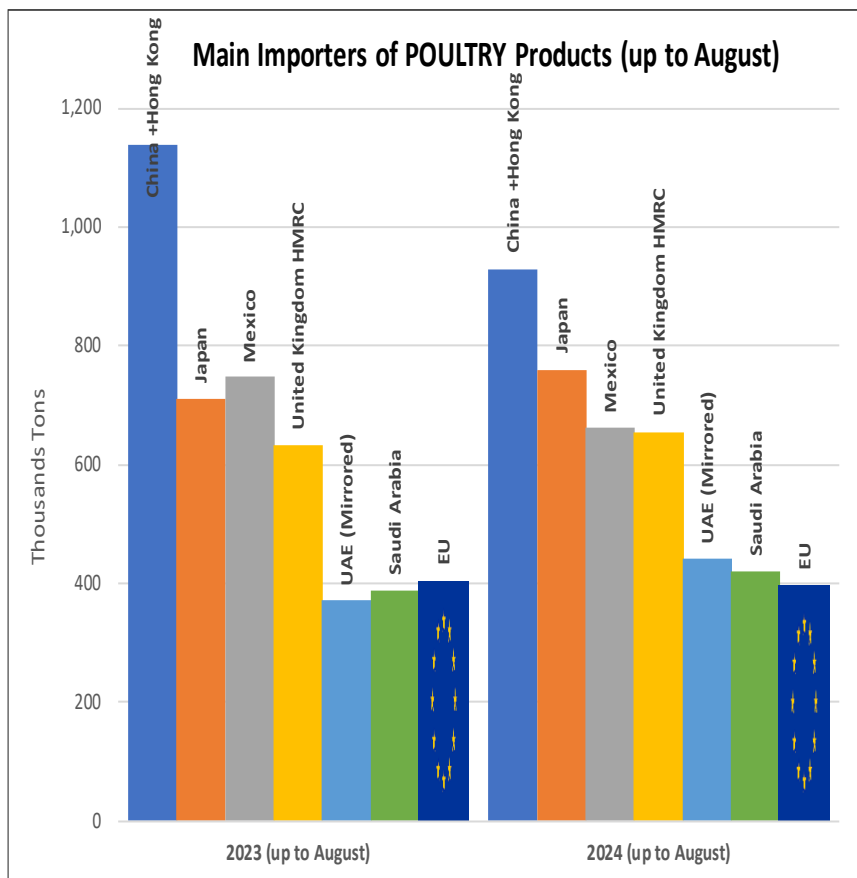


Main Exporters of POULTRY Products (up to August)
in Million Euros



WORLD MARKET

MAIN IMPORTERS



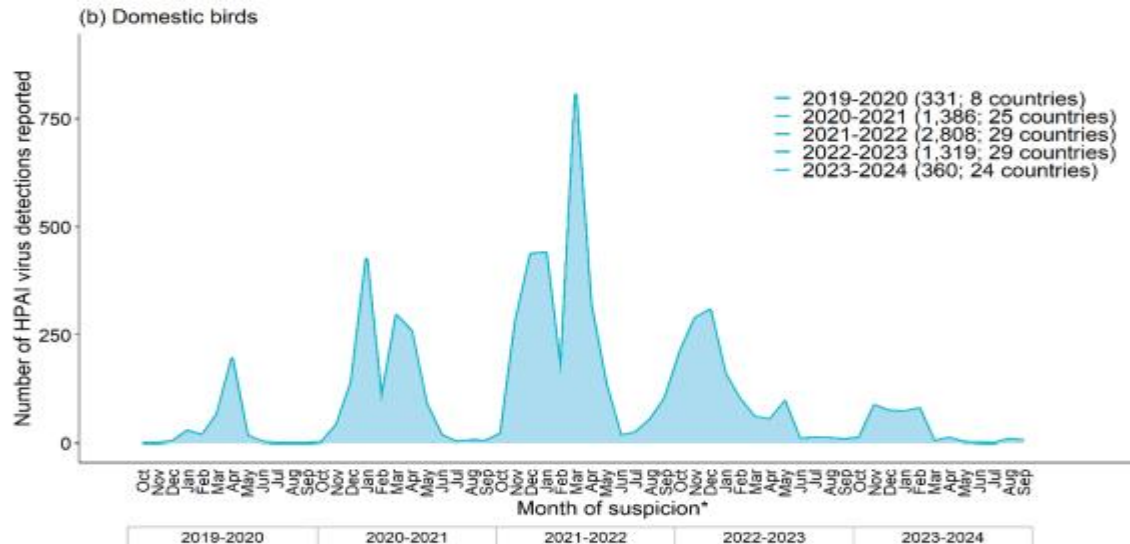
12 December 2024

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 05/12/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
HU	175	2.799.033	71%	35%
PL	19	2.530.110	8%	32%
IT	23	1.450.254	9%	18%
SK	2	425.260	1%	5%
BG	3	382.276	1%	5%
AT	6	148.001	2%	2%
FR	6	128.792	2%	2%
Other MS	14	167.168	6%	2%
Grand Total	248	8.030.894	100%	100%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	11	918.503	4%	11%
Laying hen	17	3.703.178	7%	46%
Duck	121	1.825.223	49%	23%
Turkey	30	874.189	12%	11%
Goose	33	73.124	13%	1%
Pheasant	2	6.121	1%	0%
Mixed	8	26.142	3%	0%
No information	26	604.414	10%	8%
Grand Total	248	8.030.894	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

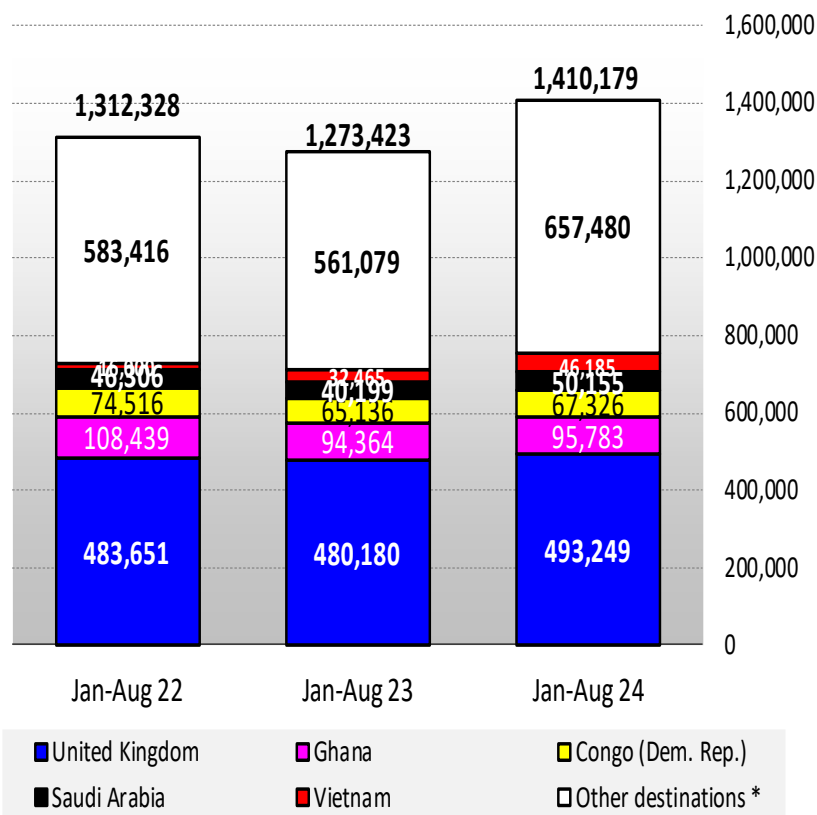
	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811,675	32%	725,611	32%	732,508	36%	721,867	37%	493,249	35.0%	+ 2.7%
Ghana	213,838	8%	228,066	10%	156,456	8%	149,223	8%	95,783	6.8%	+ 1.5%
Congo (Dem. Rep.)	101,987	4%	139,852	6%	125,421	6%	101,020	5%	67,326	4.8%	+ 3.4%
Saudi Arabia	74,407	3%	58,457	3%	74,590	4%	66,759	3%	50,155	3.6%	+ 24.8%
Vietnam	50,977	2%	31,784	1%	29,751	1%	54,230	3%	46,185	3.3%	+ 42.3%
Philippines	195,884	8%	81,155	4%	6,421	0%	4,256	0%	42,523	3.0%	+++
Ukraine	145,871	6%	162,267	7%	105,810	5%	84,639	4%	39,659	2.8%	- 31.8%
Congo	28,551	1%	30,303	1%	35,562	2%	46,737	2%	34,919	2.5%	+ 30.2%
Guinea	28,576	1%	31,324	1%	32,876	2%	33,612	2%	30,111	2.1%	+ 22.6%
Benin	61,472	2%	64,358	3%	63,516	3%	61,286	3%	28,130	2.0%	- 35.4%
Other Destinations	807,514	32%	699,196	31%	667,323	33%	638,955	33%	482,138	34.2%	
Extra-EU % change	2,520,753		2,252,374	- 11%	2,030,235	- 10%	1,962,584	- 3%	1,410,179	+ 10.7%	

EU-27 Exports of poultry meat to selected destinations

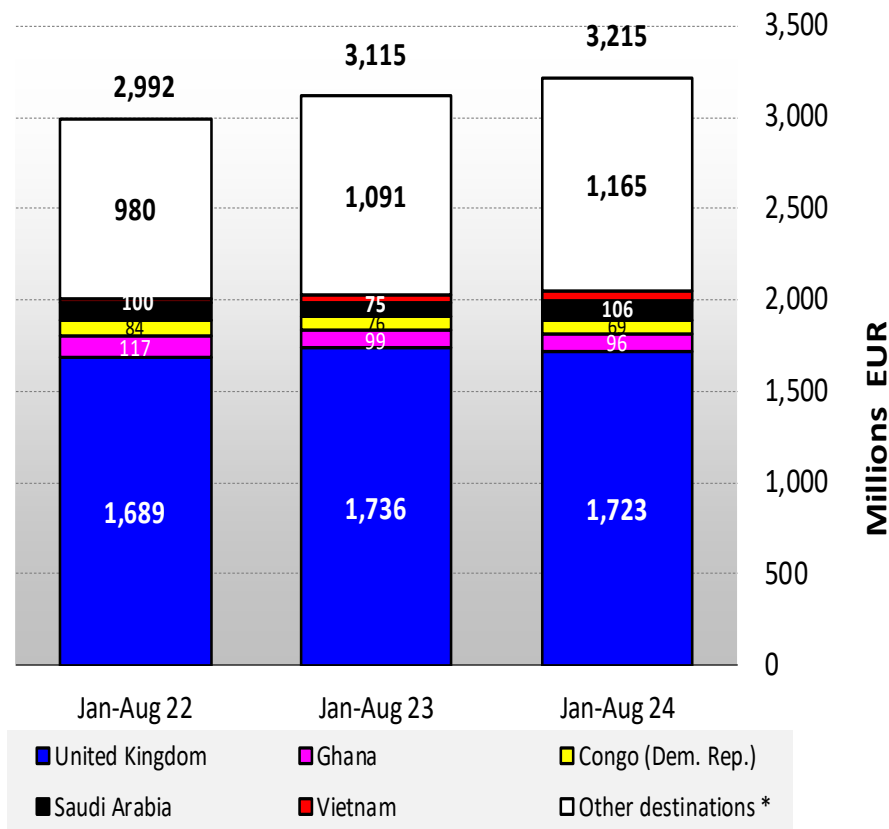
	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	1,981,927	51%	2,009,674	51%	2,652,394	68%	2,594,134	66%	1,722,752	43.9%	- 0.8%
Ghana	172,363	4%	224,103	6%	167,715	4%	156,970	4%	96,275	2.5%	- 2.4%
Congo (Dem. Rep.)	81,033	2%	116,553	3%	145,766	4%	112,110	3%	69,493	1.8%	- 8.0%
Saudi Arabia	104,518	3%	93,283	2%	159,672	4%	128,754	3%	105,556	2.7%	+ 40.8%
Vietnam	55,251	1%	35,592	1%	39,533	1%	67,641	2%	55,744	1.4%	+ 43.3%
Philippines	86,502	2%	57,220	1%	7,793	0%	6,571	0%	25,334	0.6%	+++
Ukraine	100,109	3%	119,533	3%	102,729	3%	125,678	3%	71,933	1.8%	- 19.0%
Congo	23,311	1%	26,636	1%	36,276	1%	42,776	1%	29,775	0.8%	+ 27.2%
Guinea	26,028	1%	31,994	1%	43,756	1%	47,225	1%	36,386	0.9%	+ 2.4%
Benin	64,292	2%	87,264	2%	106,959	3%	103,984	3%	36,614	0.9%	- 50.9%
Other Destinations	1,224,722	31%	1,170,503	30%	1,273,546	32%	1,360,581	35%	965,027	24.6%	
Extra-EU	3,920,057		3,972,355		4,736,138		4,746,424		3,214,890		
% change			+ 1%		+ 19%		+ 0%		+ 3.2%		

EU-27 poultry meat exports (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)

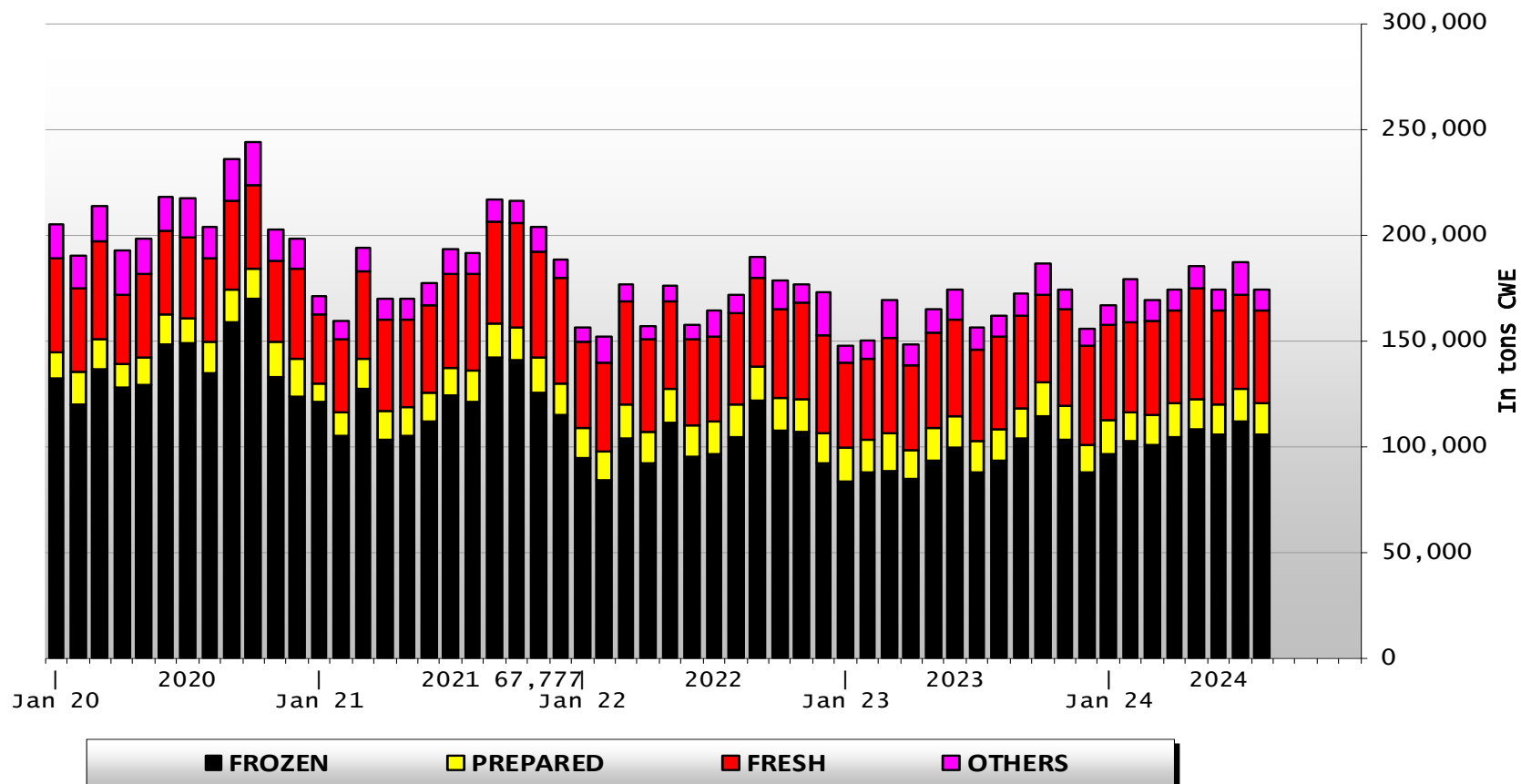


EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 69 ('Millions EUR)

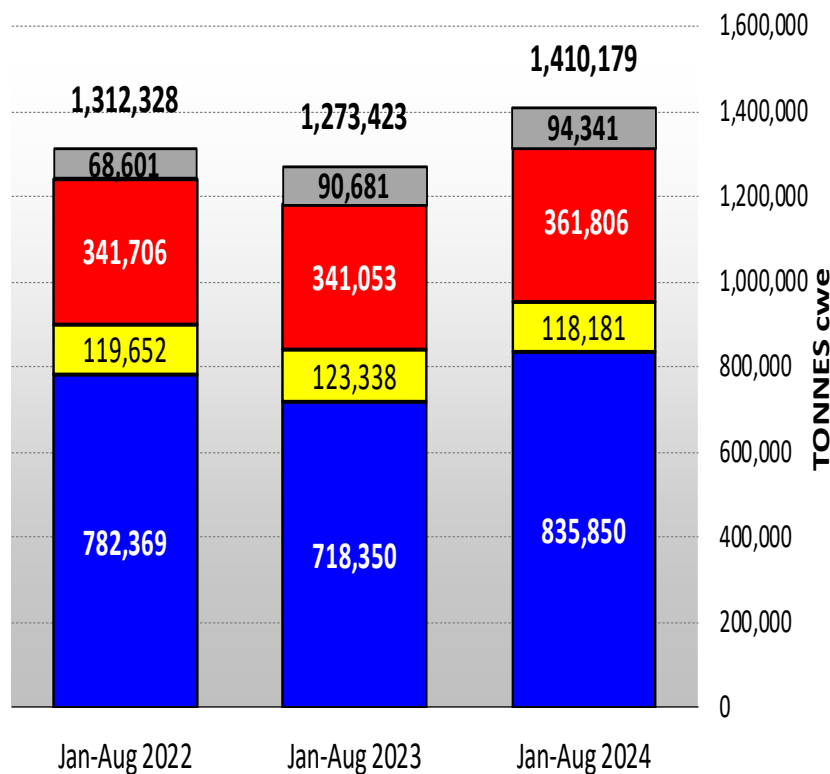
Exports of selected Poultry products



12 December 2024

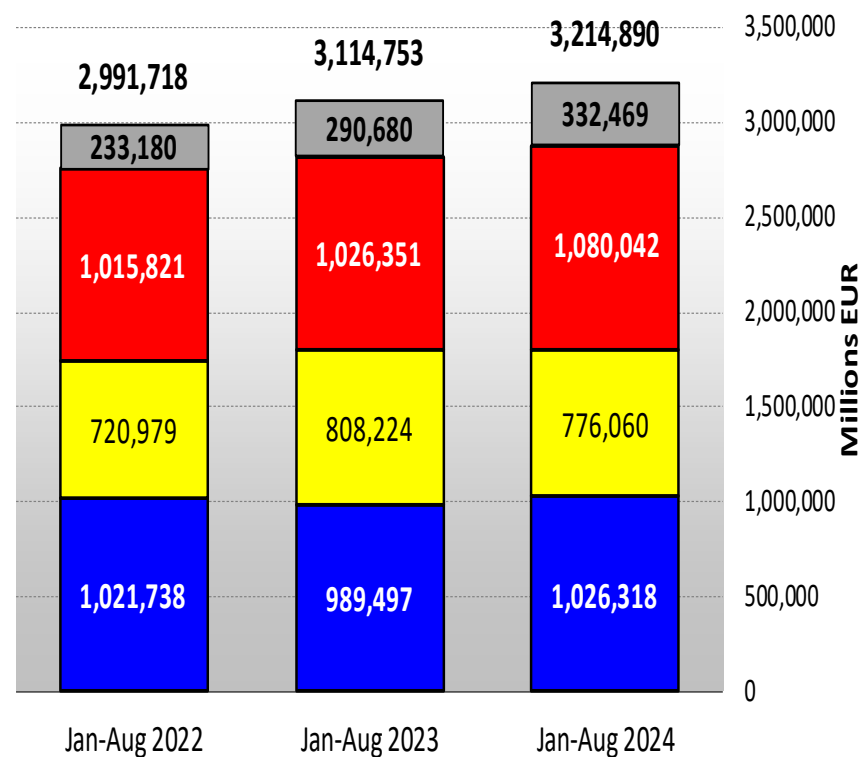
EU-27 poultry meat exports (by meat type)

EU EXPORTS of Poultry Meat (TONNES cwe)



■ FROZEN ■ PREPARED ■ FRESH ■ OTHERS

EU EXPORTS of Poultry Meat (Millions EUR)



■ FROZEN ■ PREPARED ■ FRESH ■ OTHERS

EU-27 Imports of poultry meat from selected origins

In tons of carcass weight

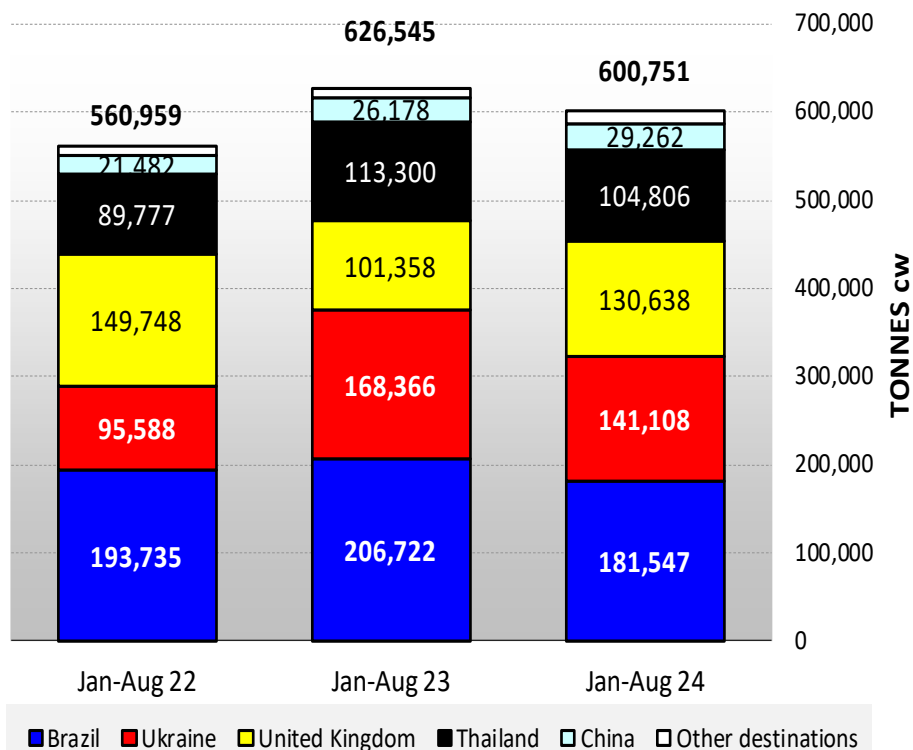
	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227,738	28%	251,887	32%	301,239	35%	290,564	32%	181,547	30.2%	- 12.2%
Ukraine	108,669	14%	102,892	13%	162,837	19%	231,906	26%	141,108	23.5%	- 16.2%
United Kingdom	293,914	37%	274,667	34%	210,851	25%	171,949	19%	130,638	21.7%	+ 28.9%
Thailand	131,374	16%	130,658	16%	131,216	15%	148,698	17%	104,806	17.4%	- 7.5%
China	17,017	2%	20,916	3%	32,864	4%	36,561	4%	29,262	4.9%	+ 11.8%
Argentina	3,273	0%	3,151	0%	4,096	0%	4,079	0%	3,544	0.6%	+++
Chile	14,382	2%	2,441	0%	466	0%	3,213	0%	2,877	0.5%	+ 43.0%
Other Destinations	8,404	1%	10,445	1%	11,076	1%	10,179	1%	6,969	1.2%	
Extra-EU	804,772		797,056		854,644		897,149		600,751		
% change			- 1%		+ 7%		+ 5%		- 4.1%		

EU-27 Imports of poultry meat from selected origins

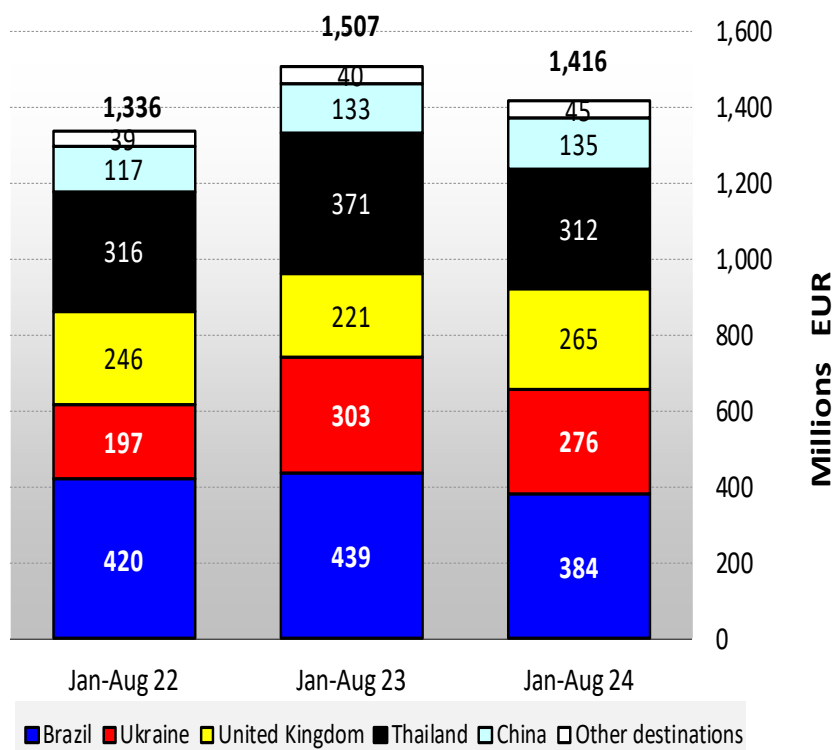
	2020		2021		2022		2023		Jan-Aug 24		Compared to Jan-Aug 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351.277	24%	388.472	29%	669.772	31%	598.220	28%	383.854	27,1%	- 12,5%
Ukraine	132.740	9%	166.208	12%	324.836	15%	418.449	20%	275.818	19,5%	- 8,8%
United Kingdom	501.768	34%	327.273	24%	368.062	17%	354.848	17%	264.750	18,7%	+ 19,8%
Thailand	316.860	22%	317.487	24%	519.150	24%	490.197	23%	312.161	22,0%	- 15,8%
China	78.298	5%	95.081	7%	186.175	9%	183.071	9%	135.160	9,5%	+ 1,7%
Argentina	6.515	0%	6.508	0%	11.463	1%	11.360	1%	8.378	0,6%	+ 50,2%
Chile	35.557	2%	6.019	0%	1.537	0%	7.254	0%	6.421	0,5%	+ 33,7%
Bosnia-Herz.	7.809	1%	10.345	1%	10.728	1%	9.362	0%	11.200	0,8%	+ 72,7%
Norway	5.280	0%	7.914	1%	8.286	0%	8.888	0%	7.011	0,5%	+ 16,1%
Switzerland	6.229	0%	5.300	0%	8.975	0%	6.730	0%	4.392	0,3%	- 2,8%
<i>Other Destinations</i>	16.429	1%	15.466	1%	18.949	1%	20.191	1%	7.114	0,5%	
Extra-EU	1.458.760		1.346.074		2.127.933		2.108.569		1.416.259		
% change			- 8%		+ 58%		- 1%		- 6,0%		

EU27 poultry meat imports (by origin)

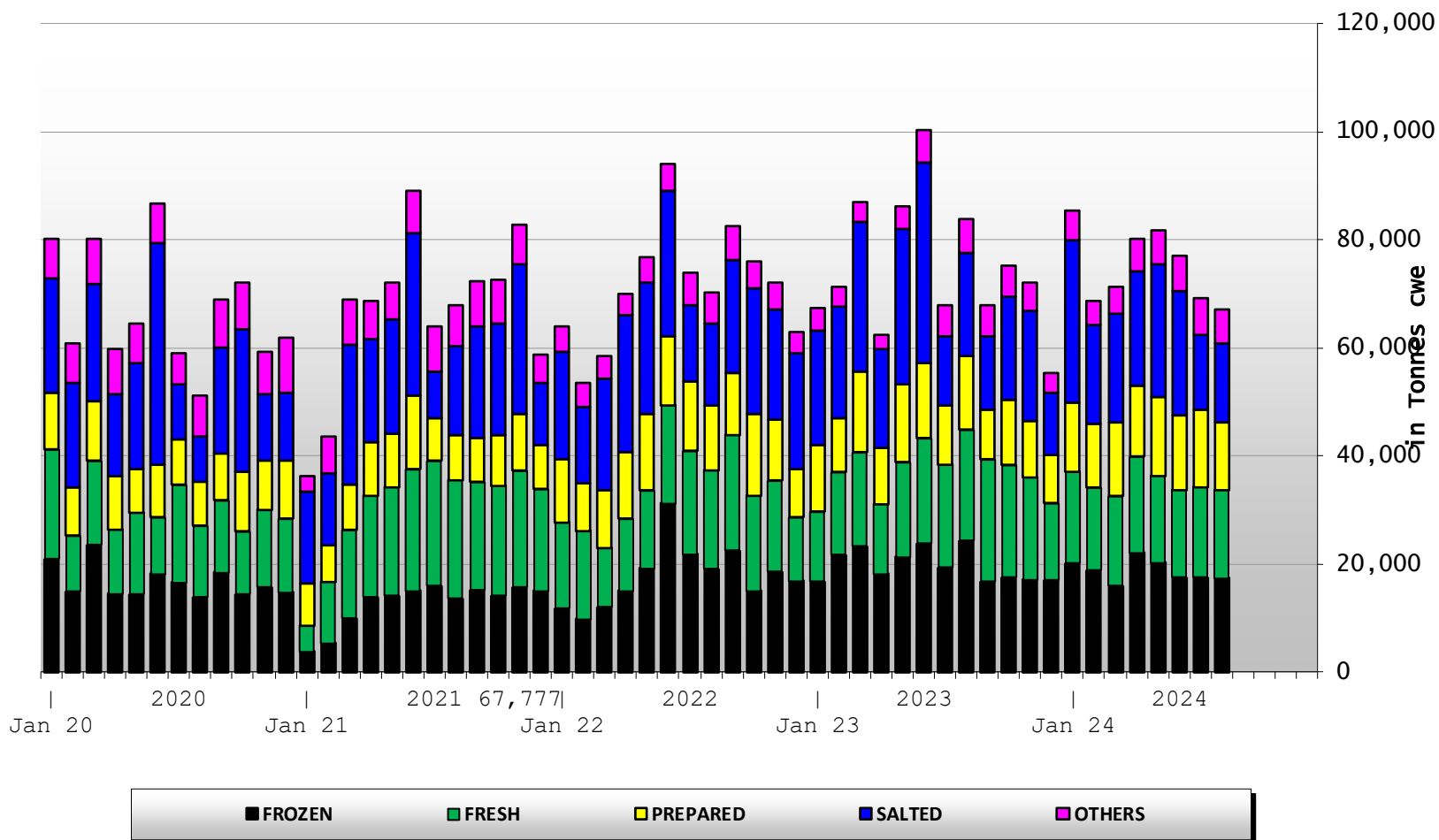
EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)



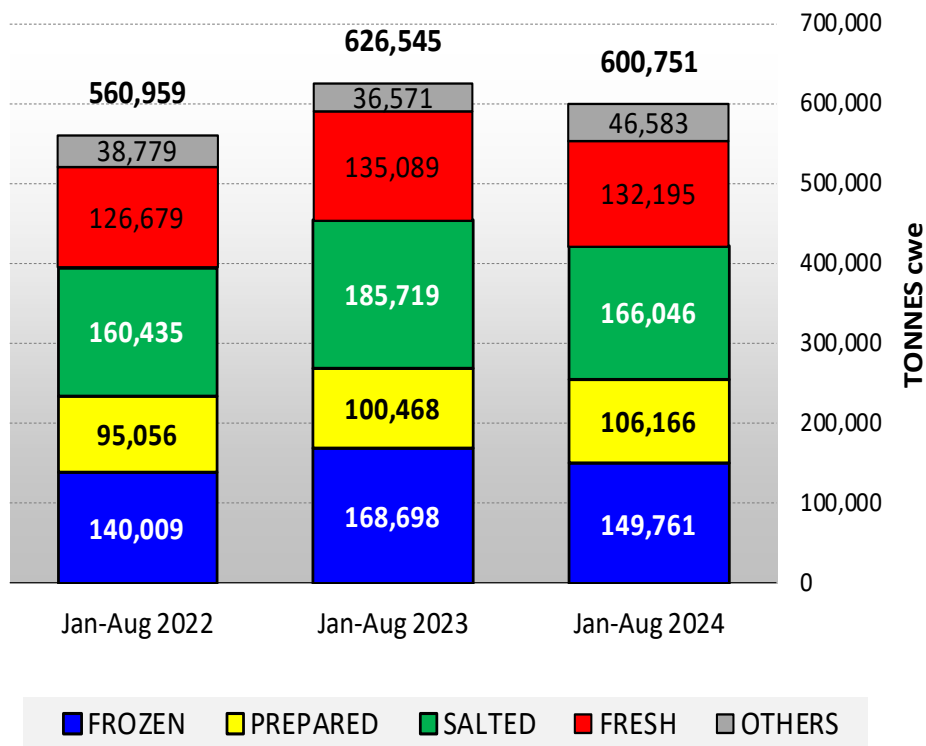
Imports of selected Poultry products



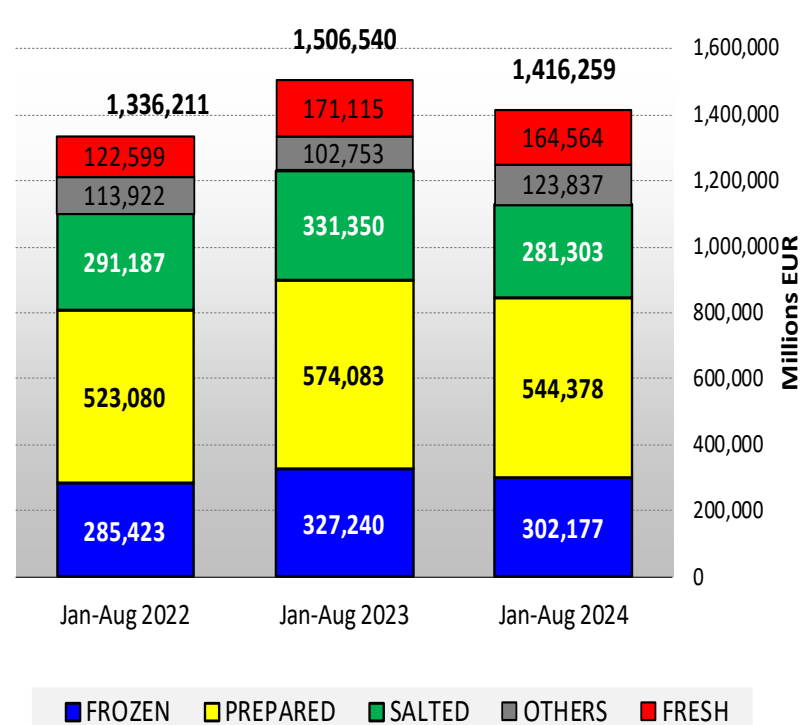
12 December 2024

EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)

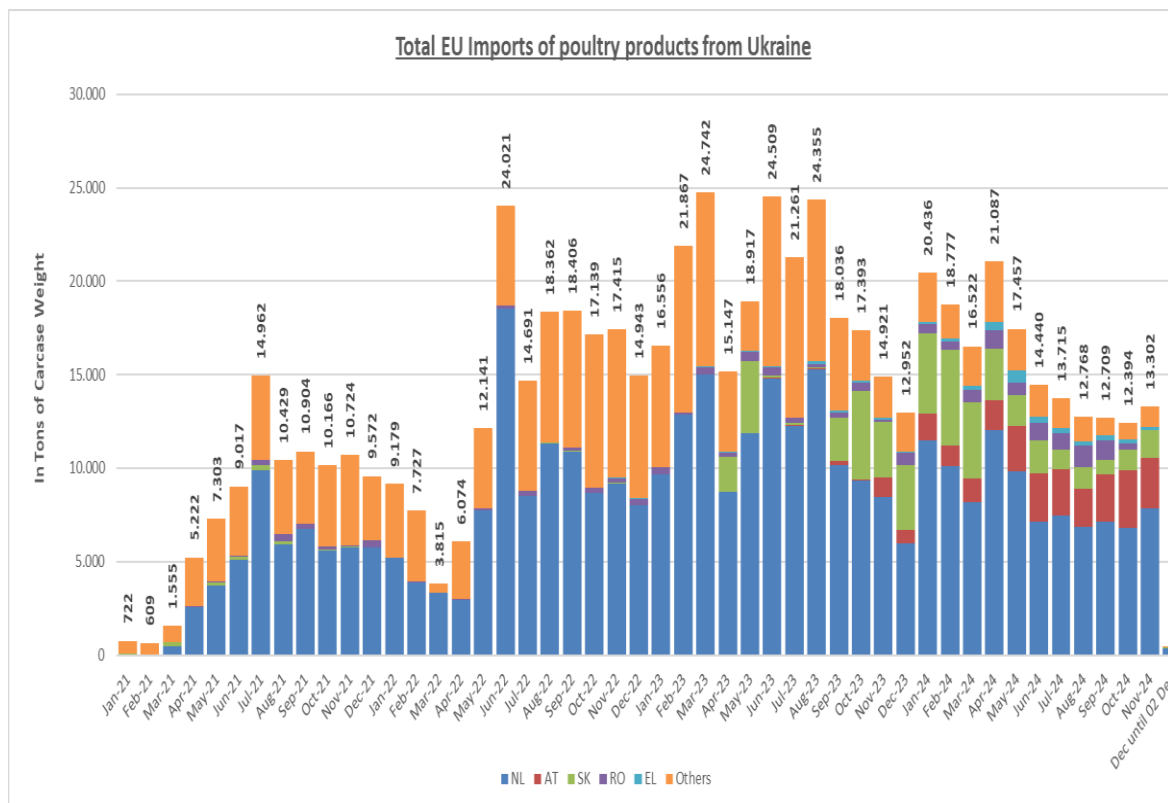


EU IMPORTS of Poultry Meat (Millions EUR)



TRADE

EU IMPORTS



	2021	2022	2023	2024 (until 2 December)
EU Total	91.187	163.912	230.658	174.051
NL	51.559	98.192	134.424	95.124
SK	1.242	131	19.456	25.335
AT			2.186	23.336
RO	1.665	1.627	3.947	7.580
PL	21.007	38.127	26.862	4.920
LT	2.871	3.455	4.282	4.337
CZ		527	971	3.132
EL		112	769	2.996
ES			1.895	1.896
DE	132	717	158	1.686
CY	21	98	140	888
BG	1	23	67	886
IT	2	257	629	784
FR		66	473	491
EE	7	1	88	320
HU	12.678	20.565	34.055	261
BE			98	55
PT				23
SE		15	22	
LV			105	
IE			31	

Please note that this data shows total poultry imports and does not correspond only to poultry products subject to the automatic emergency brake as foreseen by Regulation 2023/1077. **Until 5/12/2024 94% of that amount has been already filled up.**

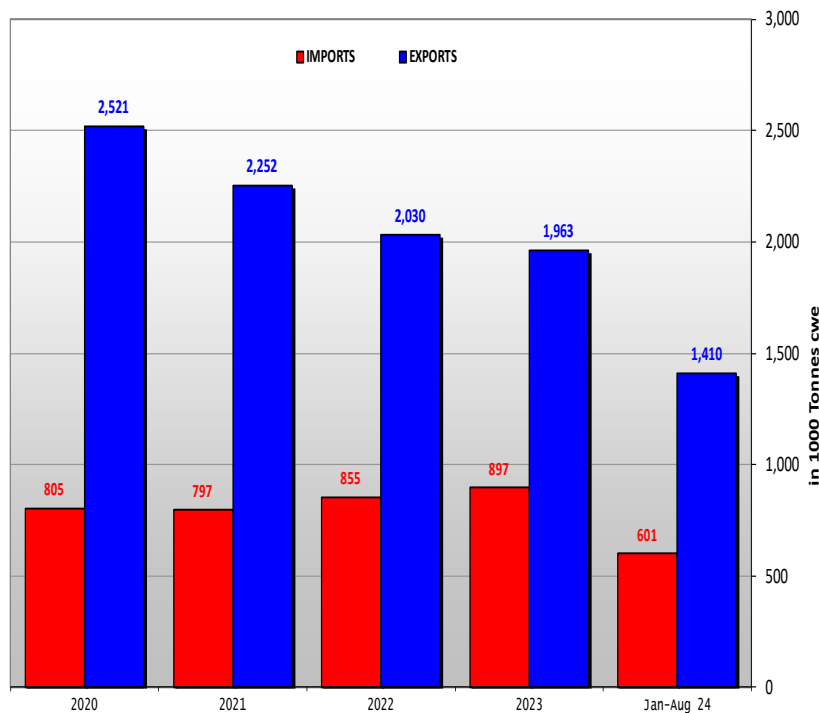
DG AGRI E3, source: **TAXUD surveillance.**

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

12 December 2024

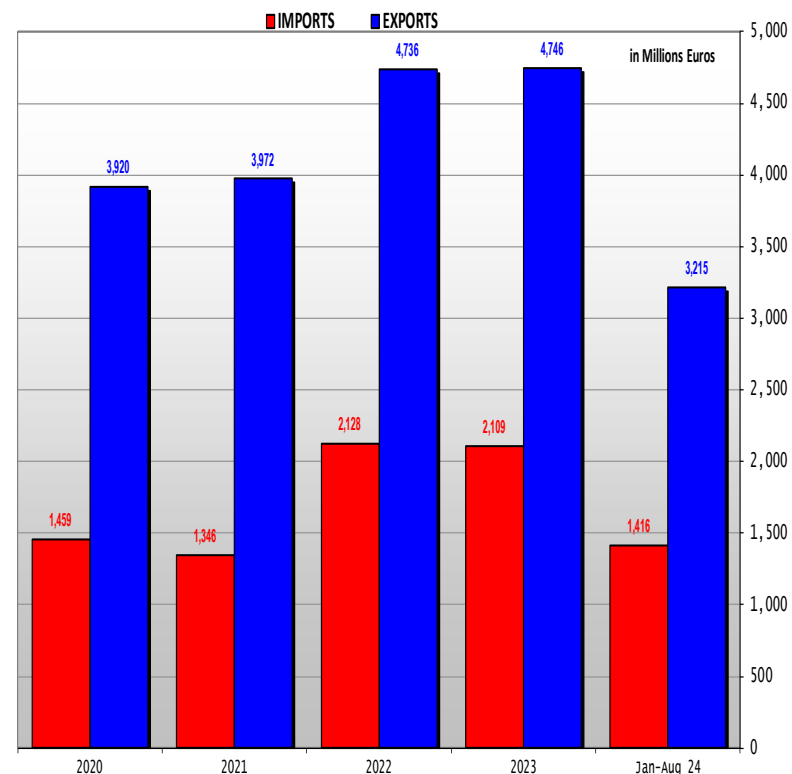
TRADE

in 1000 tons cwe



BALANCE

in million EUR



12 December 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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