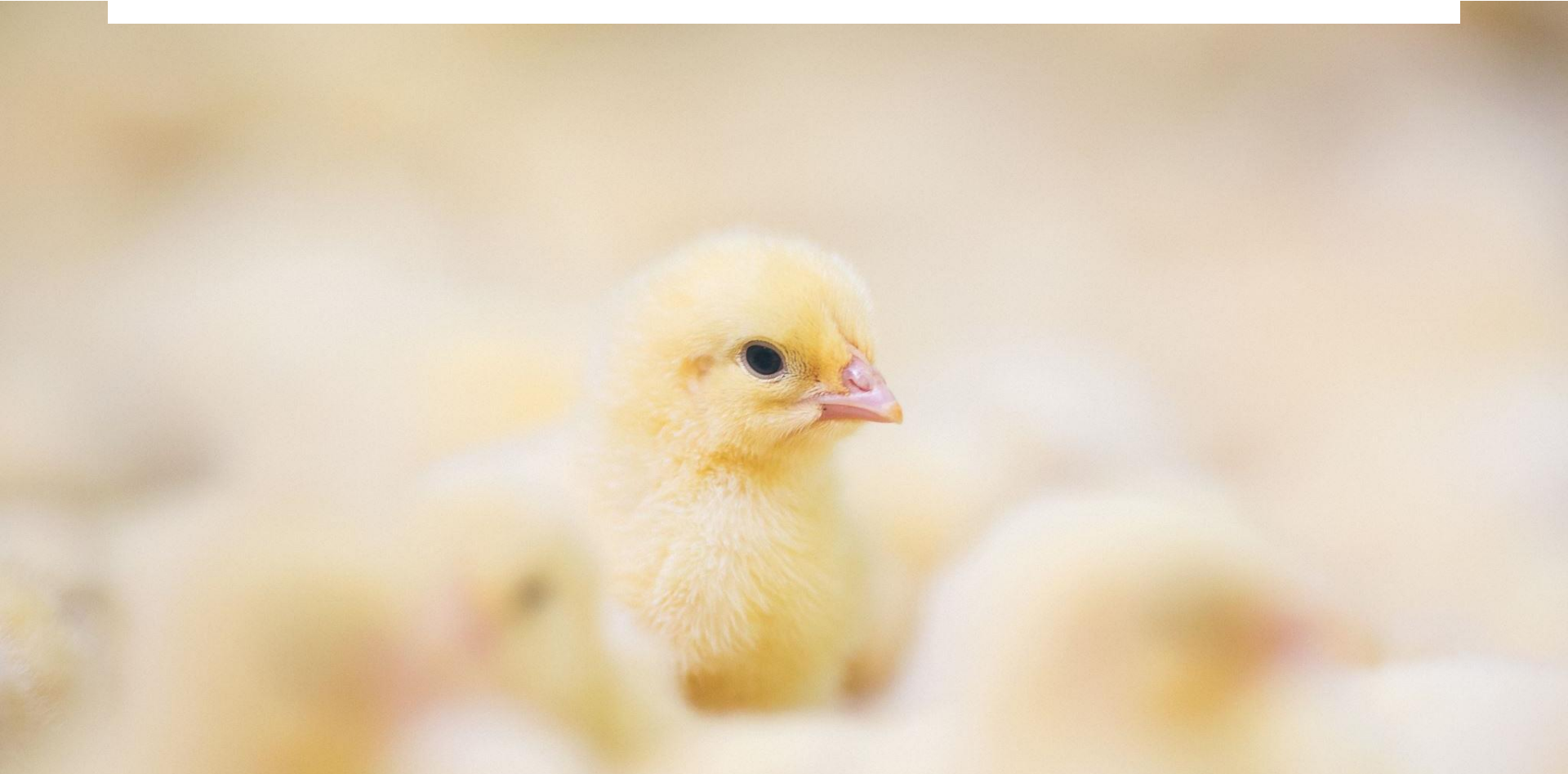


Market Situation for Poultry

CMO GREX on Animal Products - *17 July 2025*



FORECAST

EU production of poultry

Qty in Tonnes

% change

Source : Eurostat & Forecast 2025 by MS

	2023	2024	%2024/2023	trend 2025/2024
PL	2,729,890	2,746,040	0.6	↗
ES	1,638,640	1,718,430	4.9	↑
FR	1,503,580	1,533,410	2.0	↑
DE	1,543,000	1,563,000	1.3	↗
IT	1,213,160	1,334,140	10.0	↗
NL	849,620	849,630	0.0	↘
RO	491,220	510,690	4.0	↑
BE	449,040	428,200	-4.6	↑
EL	248,770	273,890	10.1	↗
IE	170,940	167,650	-1.9	↑
SE	176,120	175,860	-0.1	↑
CZ	169,970	167,690	-1.3	↑
AT	143,580	150,470	4.8	↑
DK	151,920	159,200	4.8	↘
FI	147,130	143,580	-2.4	↑
BG	119,530	120,890	1.1	↗
LT	86,280	85,950	-0.4	↗
HR	71,620	72,090	0.7	↑
SK	77,370	77,360	-0.0	↗
SI	73,660	75,250	2.2	↗
LV	36,600	37,080	1.3	↗
CY	27,260	27,770	1.9	↗
EE				
HU	479,880	514,810	7.3	
PT	370,980	380,740	2.6	
MT	4,250	4,740	11.5	
EU27	12,974,010	13,318,560	2.7	↑

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

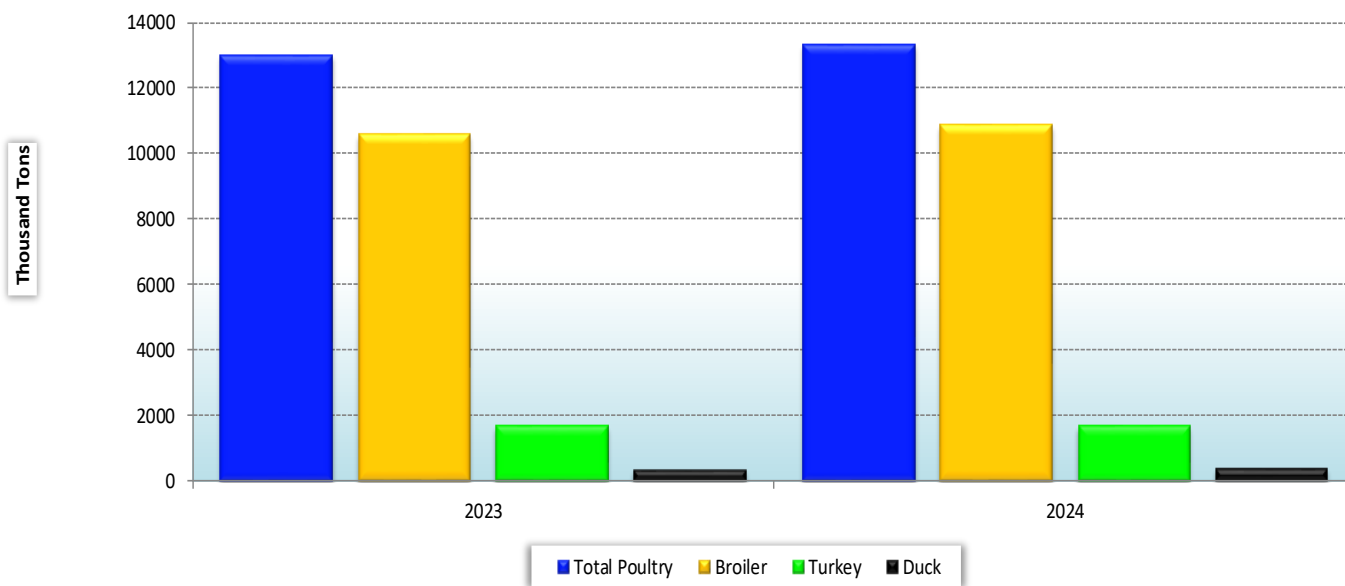
EU production of broiler					
	Qty in Tonnes		% change		
Source : Eurostat & Forecast 2025 by MS					
	2023	2024	%2024/2023		trend 2025/2024
PL	2,231,610	2,284,950		2.4	↑
ES	1,349,990	1,401,860		3.8	↑
FR	1,114,430	1,128,280		1.2	↑
DE	1,076,000	1,083,000		0.7	↑
IT	993,950	1,083,180		9.0	↘
NL	863,970	849,620		-1.7	↓
BE	442,020	421,480		-4.6	↑
RO	475,450	500,760		5.3	↑
EL	244,850	271,690		11.0	↗
SE	167,170	166,880		-0.2	↑
CZ	161,020	159,100		-1.2	↗
IE	144,730	137,010		-5.3	↑
DK	151,730	159,030		4.8	↘
FI	138,280	134,770		-2.5	↑
BG	90,580	90,540		-0.0	↑
LT	84,240	83,040		-1.4	↗
SK					
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	↗
EE					
AT					
HU	348,840	378,980		8.6	
PT	314,170	322,970		2.8	
MT	4,250	4,740		11.5	
EU27	10,588,350	10,856,500		2.5	↑

EU production of turkey				
	Qty in Tonnes		% change	
	2023	2024	%2024/2023	trend 2025/2024
PL	409,170	367,310	-10.2	↘
DE	406,000	422,000	3.9	↘
PL	409,170	367,310	-10.2	↘
IT	211,130	242,750	15.0	↗
FR	244,920	240,230	-1.9	↘
ES	231,590	248,030	7.1	↘
IE	14,720	16,400	11.4	↗
CZ	1,740	1,720	-1.1	↗
HR				
FI	8,840	8,810	-0.3	↘
BE		6,570		↗
SI	5,220	5,590	7.1	↘
SE	4,690	4,680	-0.2	↘
SK				
EL	2,880	2,140	-25.7	↘
AT				
HU	63,910	56,210	-12.0	
PT	45,650	44,590	-2.3	
EU27	1,650,660	1,667,160	1.0	↘

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT PT

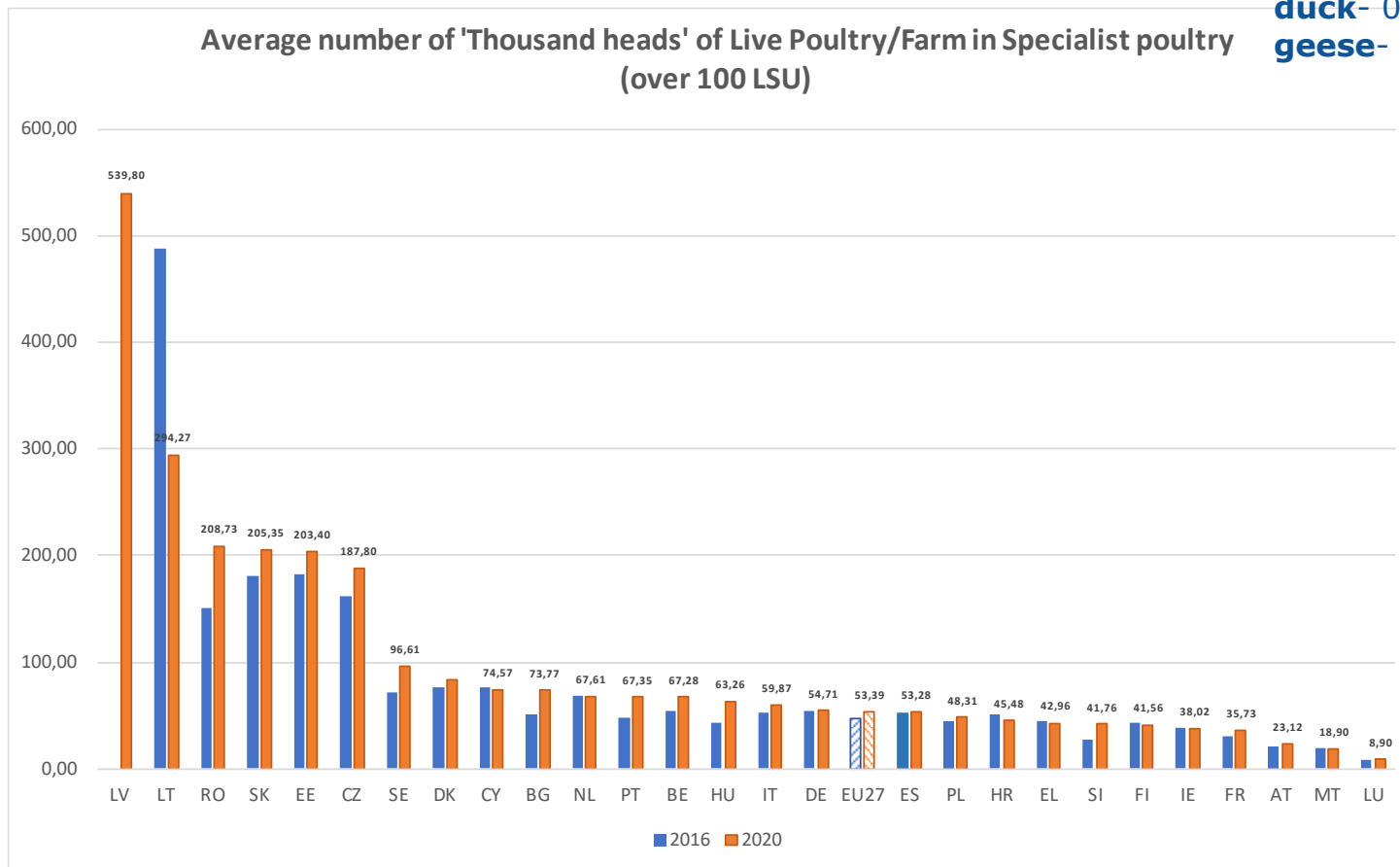


	2023	2024	% 2024/ 2023	% 2025/ 2024
Total Poultry	12,974	13,319	+ 2.7%	↑
Broiler	10,588	10,857	+ 2.5%	↑
Turkey	1,651	1,667	+ 1.0%	↓
Duck	314	351	+ 11.8%	↑

* Source: Eurostat, forecast 2025 by MS

FARM STRUCTURE SURVEY

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

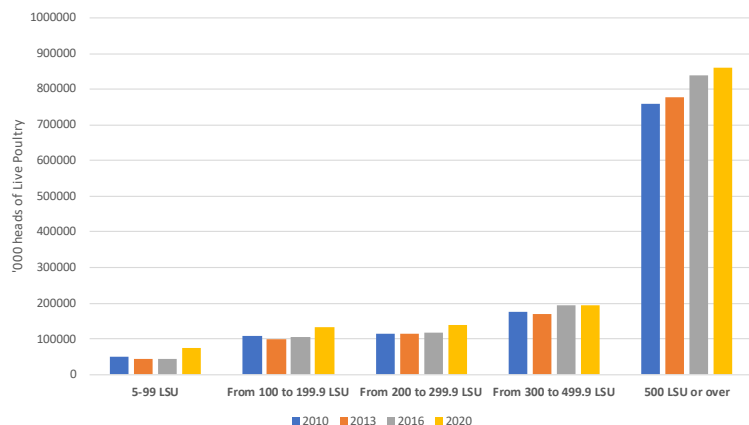


Specialist poultry - EU

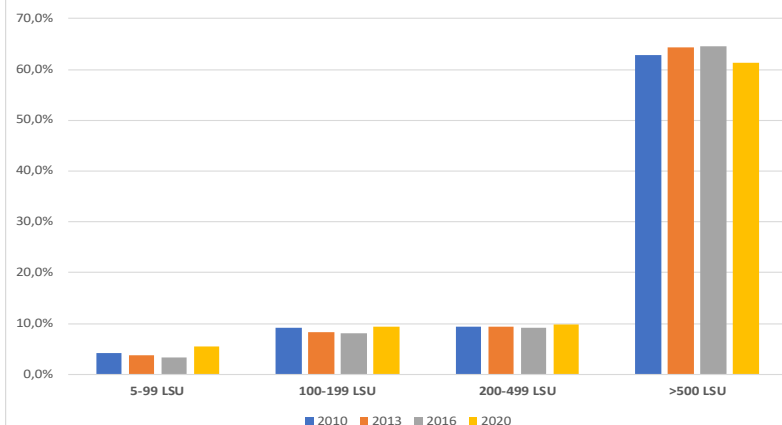
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-7% compared to 2016)
- 14.167.720 LSU in 2020 (-11% compared to 2016)

FARM STRUCTURE SURVEY

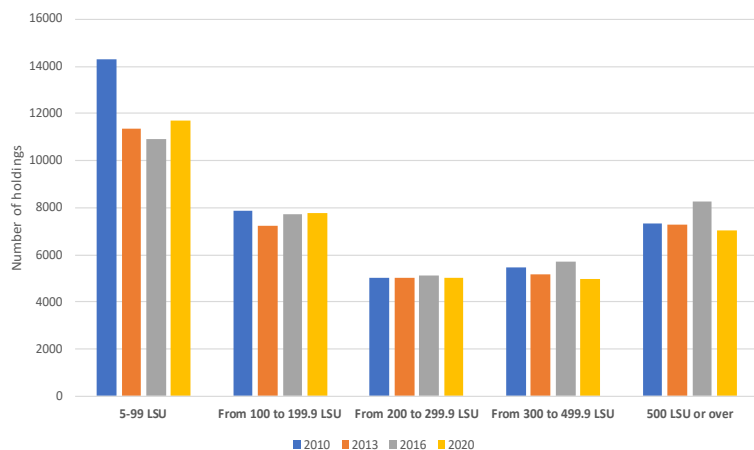
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



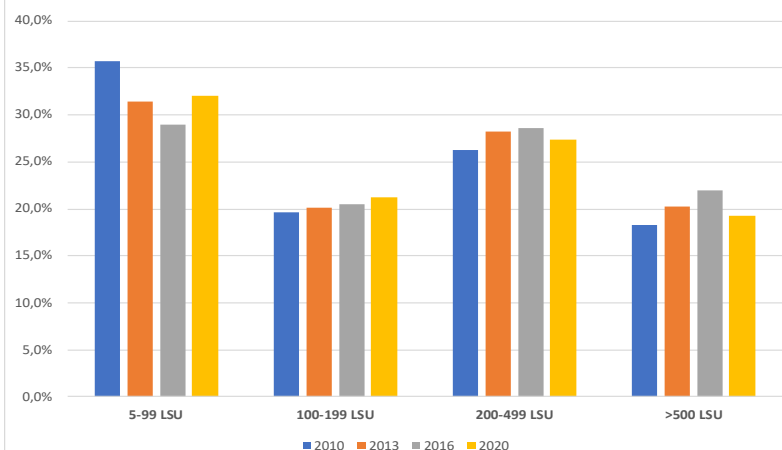
Share of animals by LSU class (over 5 LSU)



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

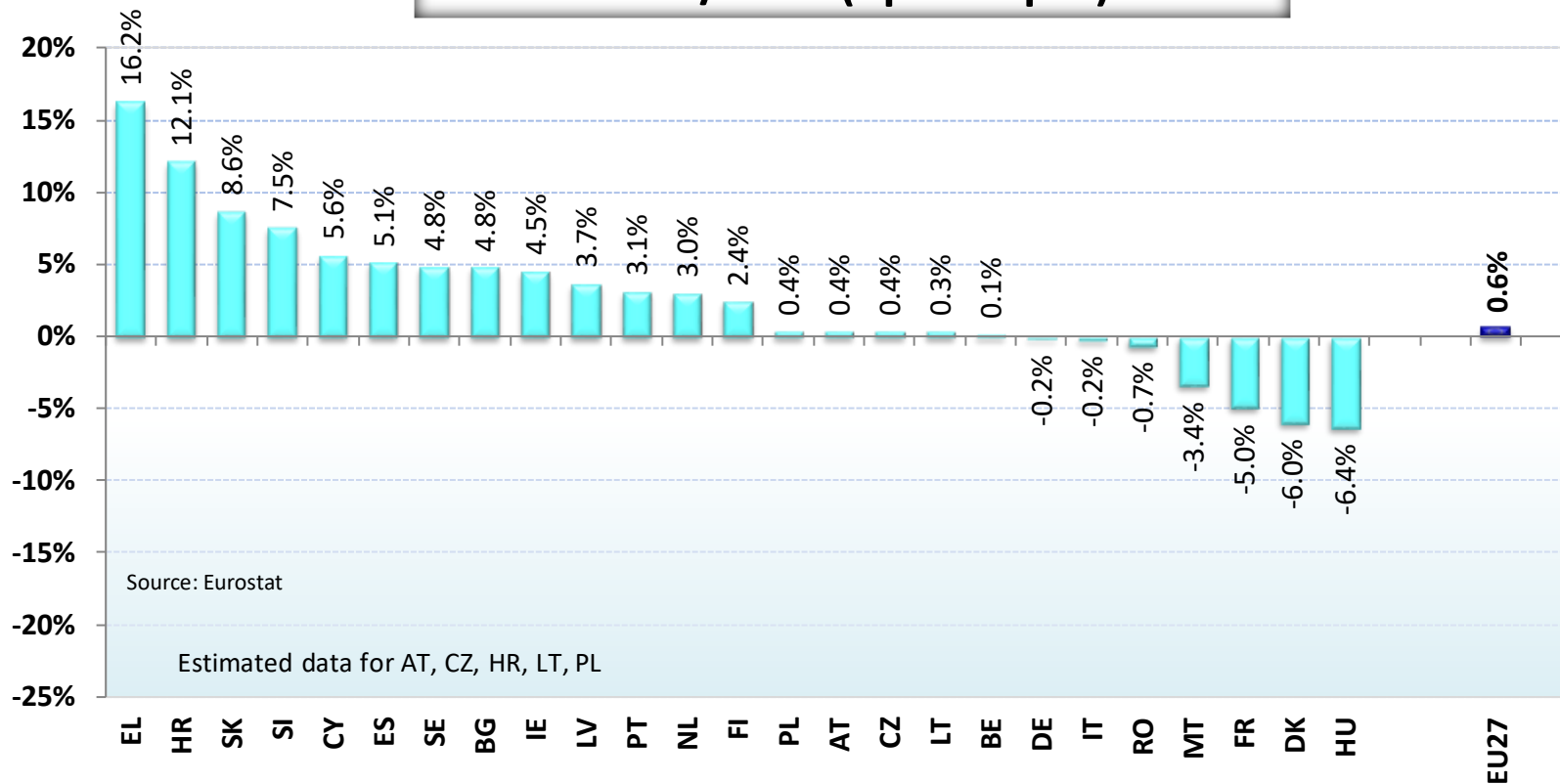


Share of holdings by LSU class (over 5 LSU)

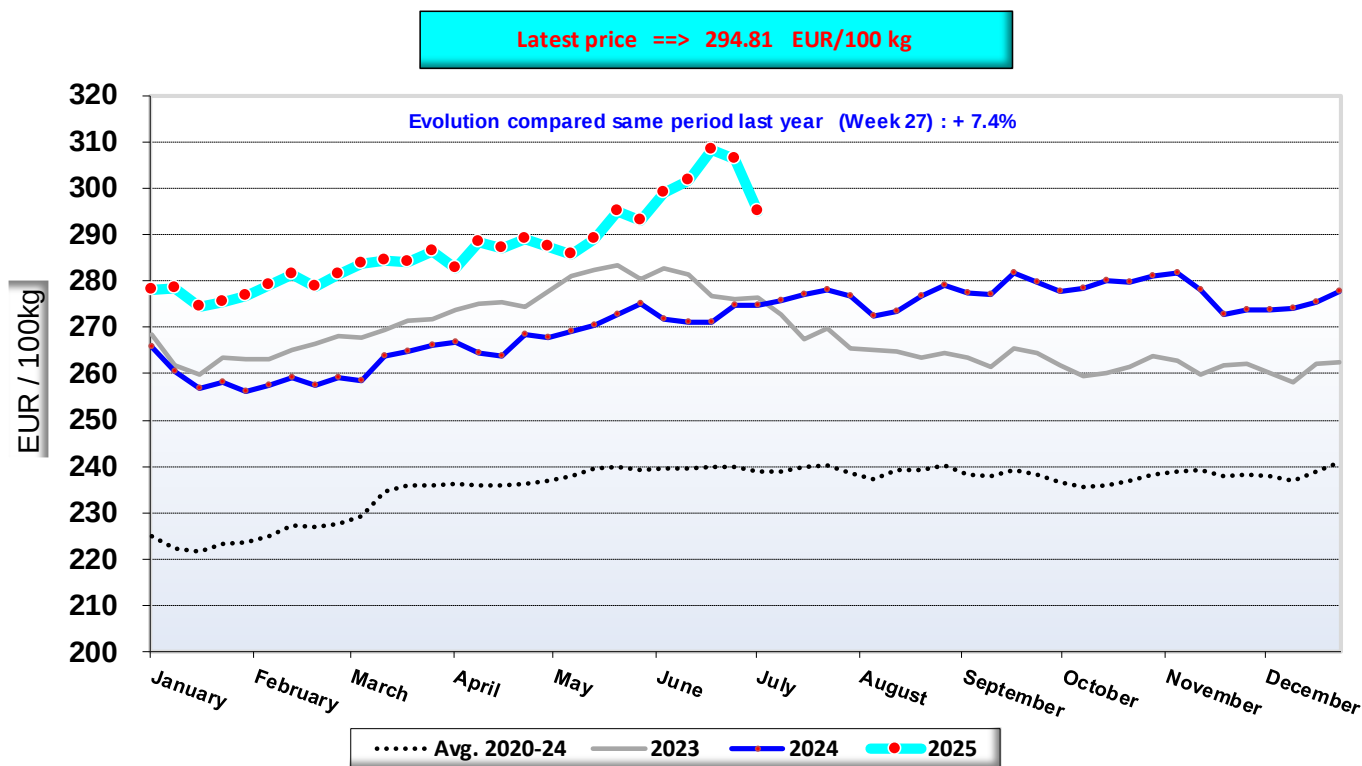


PRODUCTION

**Change in Poultry Meat Production in %
2025/2024 (up to April)**



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

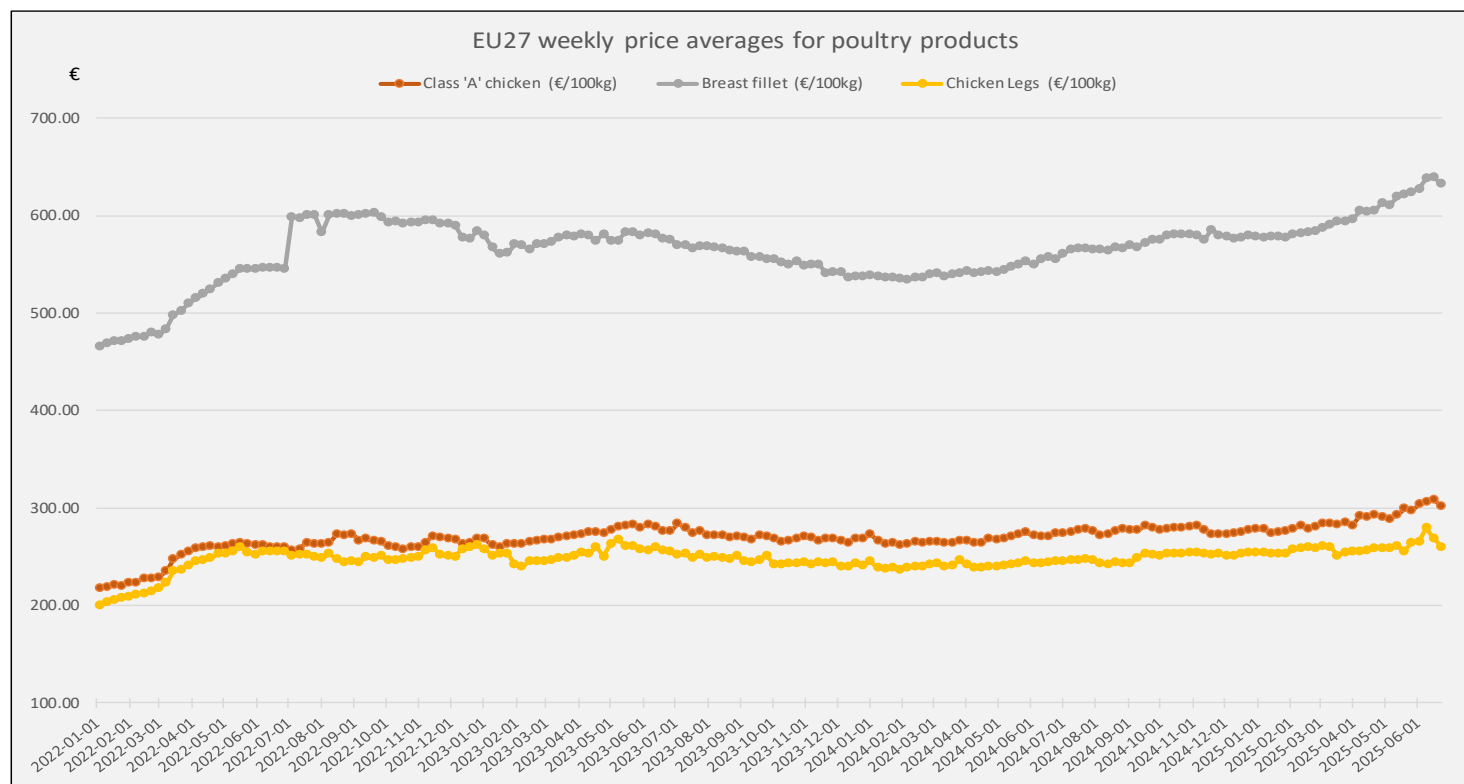


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 26

EU27 weekly price averages for poultry products



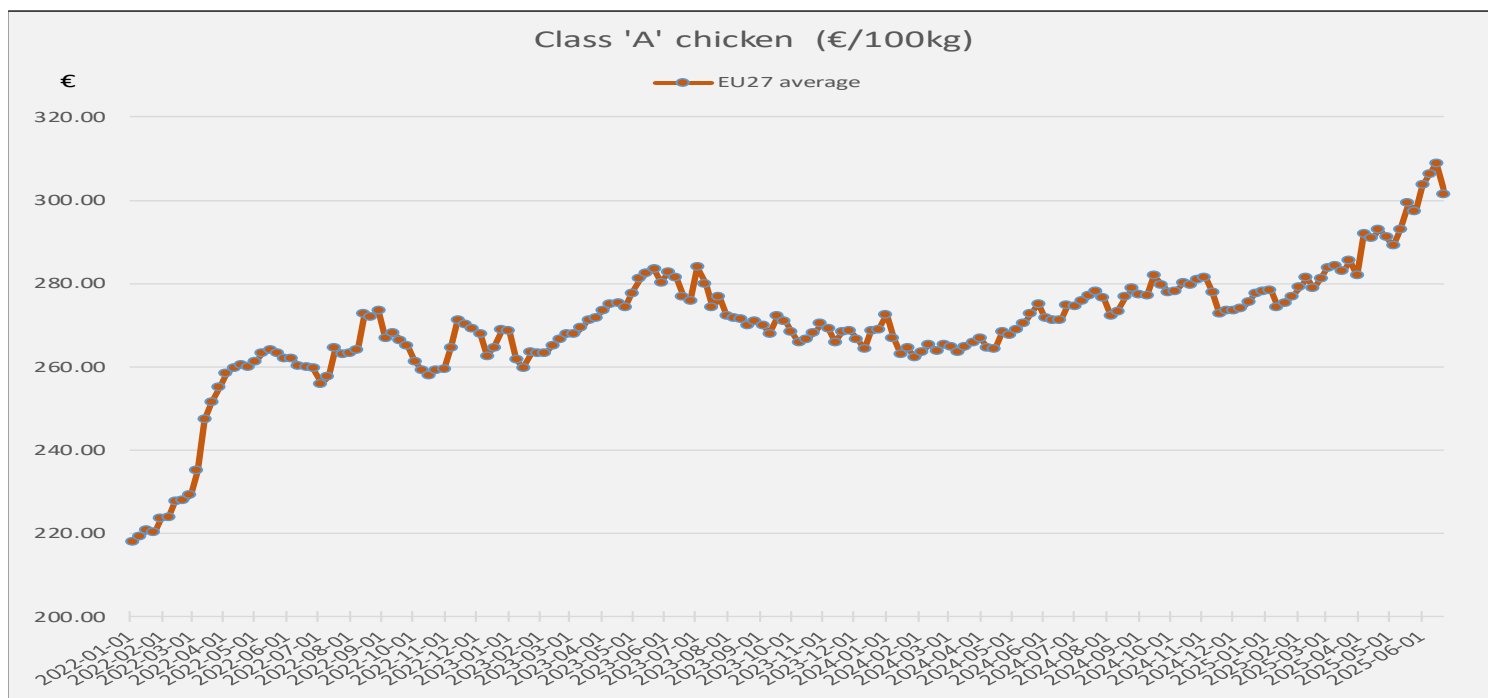
Week - 26	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	301.50	633.45	259.80

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

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

Weekly price of 'Class A Chicken'

Week - 26 Class 'A' chicken



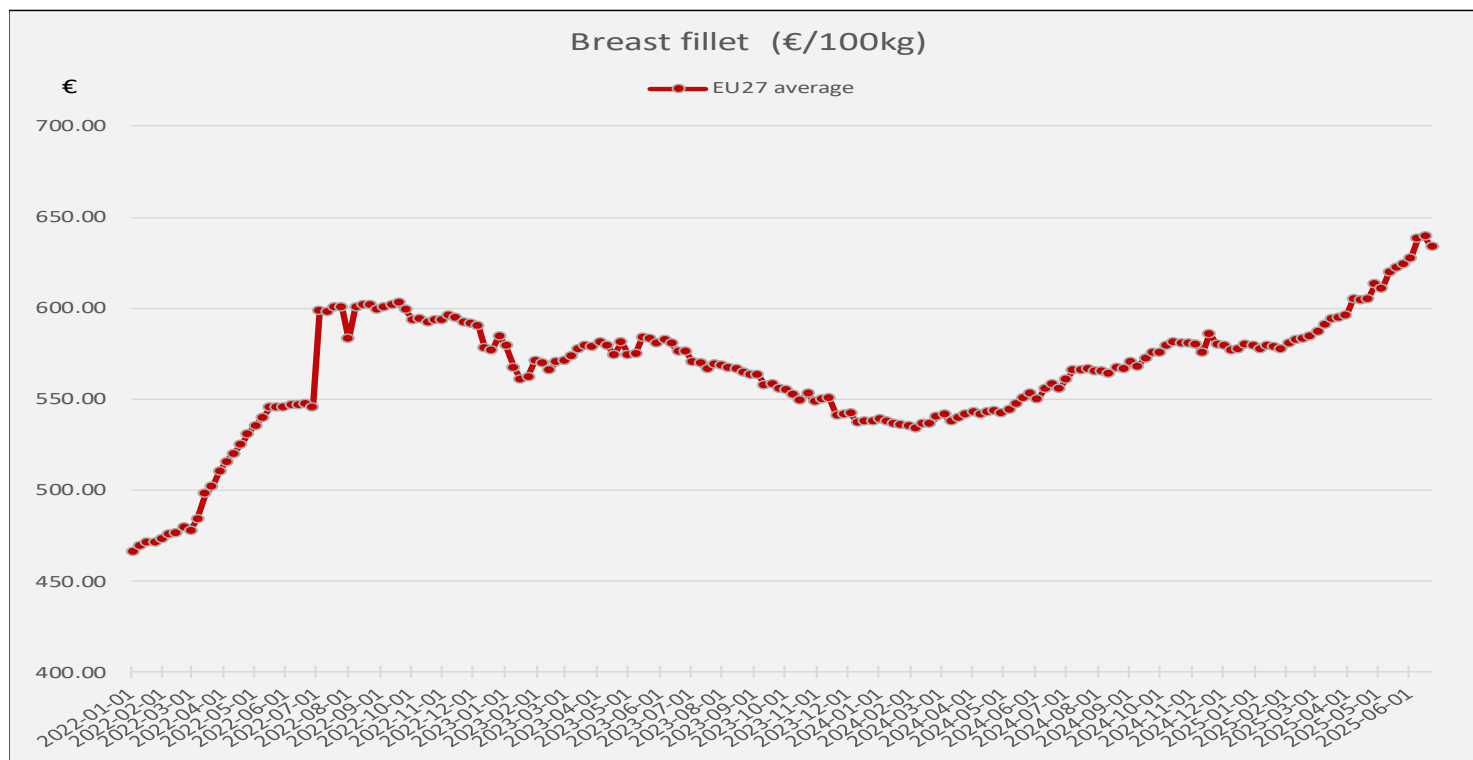
Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	301.50	- 2.4%	+ 1.4%	+ 9.8%

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

Weekly price of 'Breast fillet'

Week - 26

Breast fillet



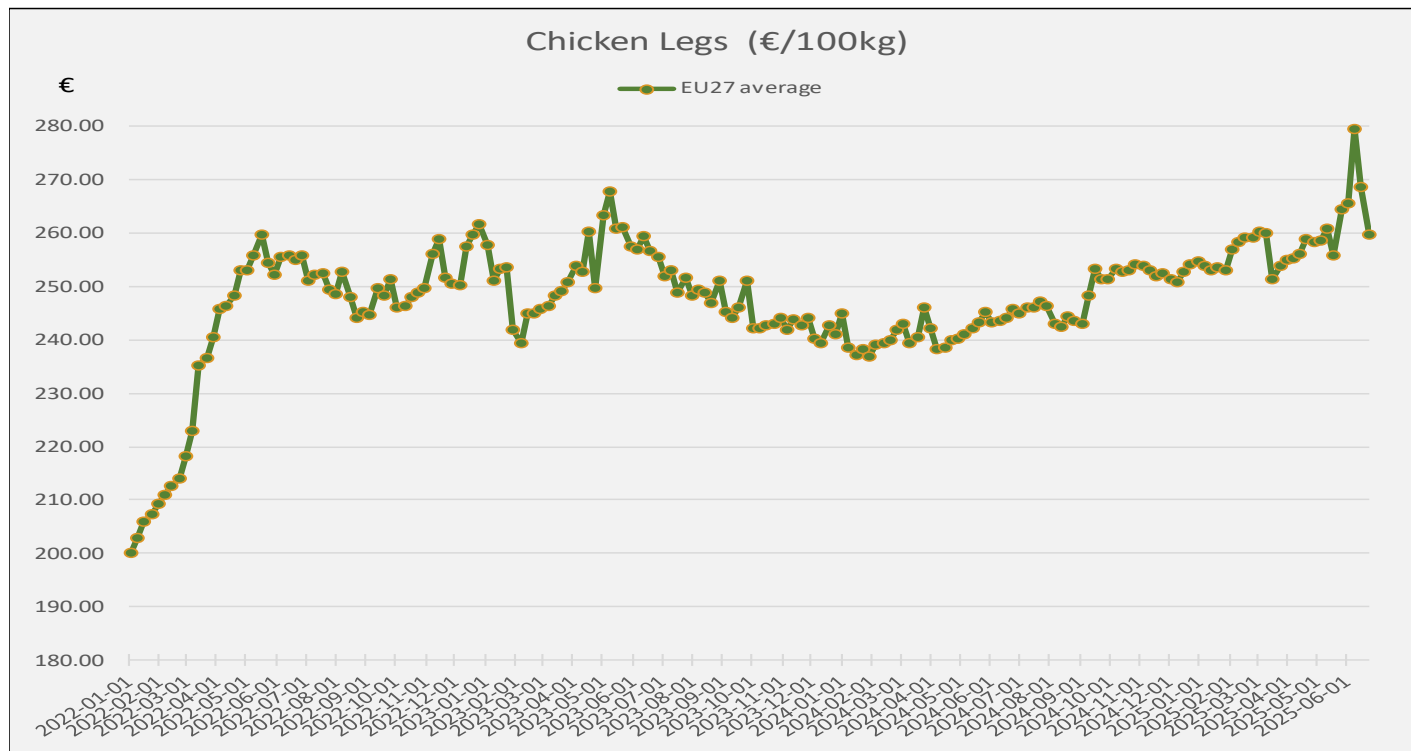
Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	633.45	- 0.9%	+ 1.5%	+ 14.0%

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

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

Weekly price of 'Chicken legs'

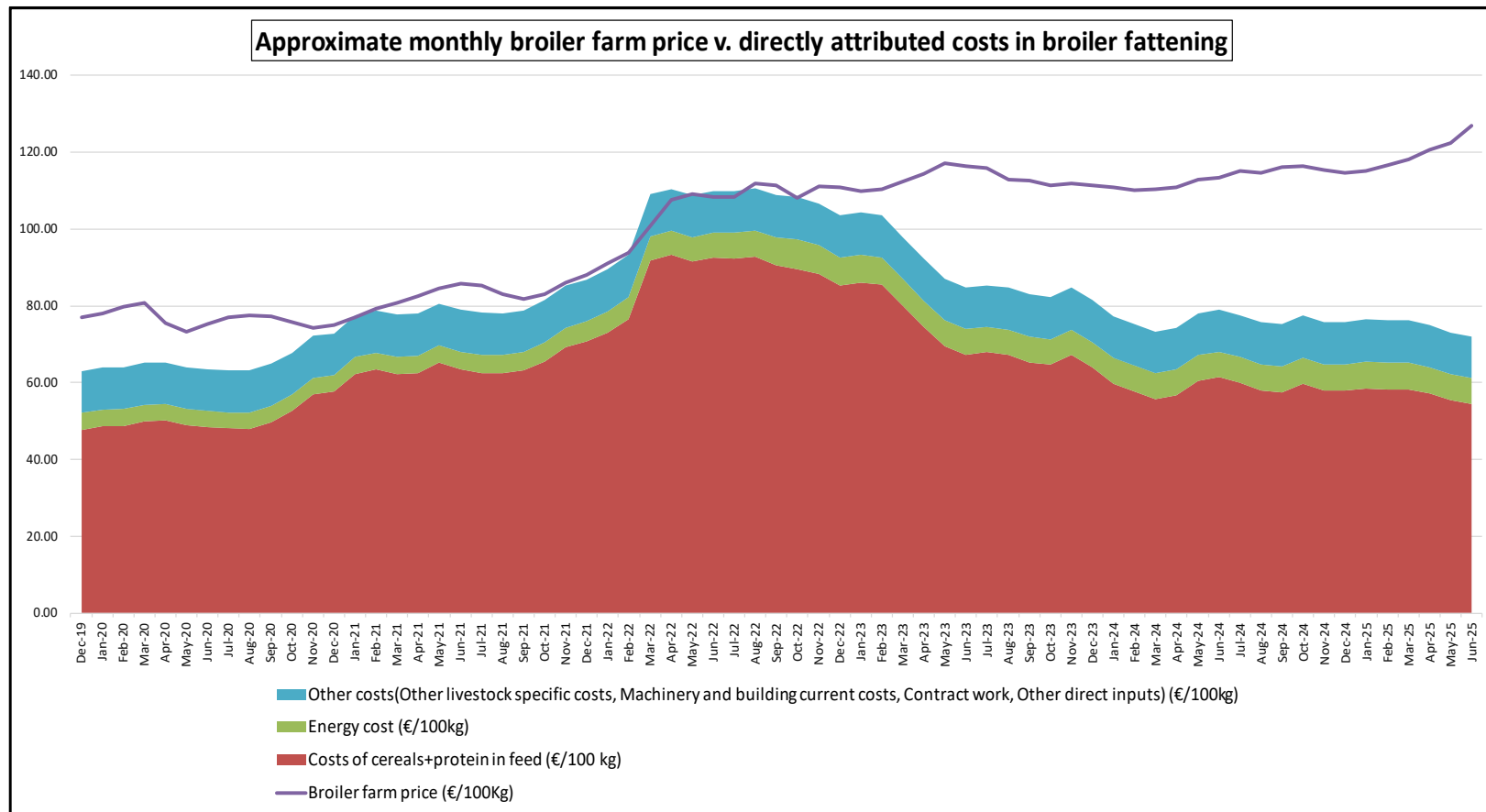
Week - 26 Chicken Legs



Week - 26	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	259.80	- 3.3%	- 1.8%	+ 5.7%

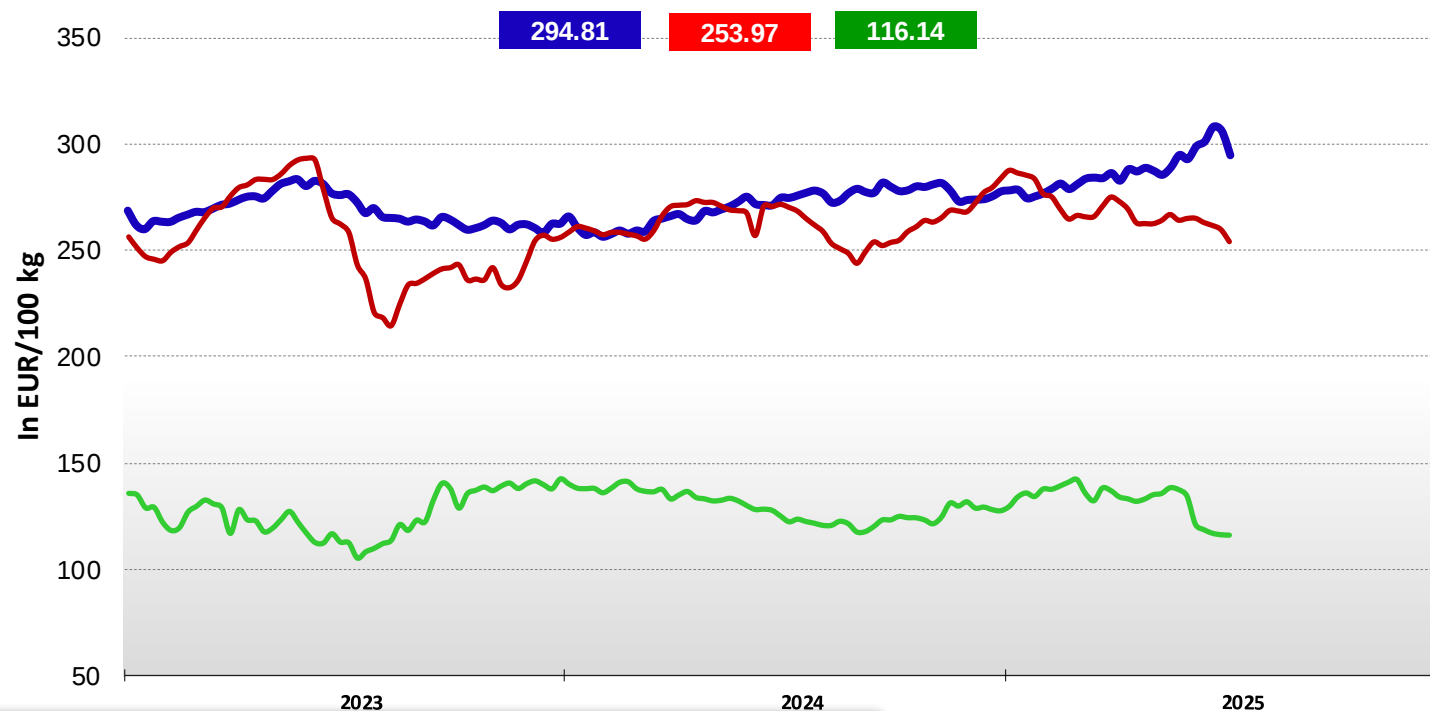
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !

COST BROILER PRODUCTION



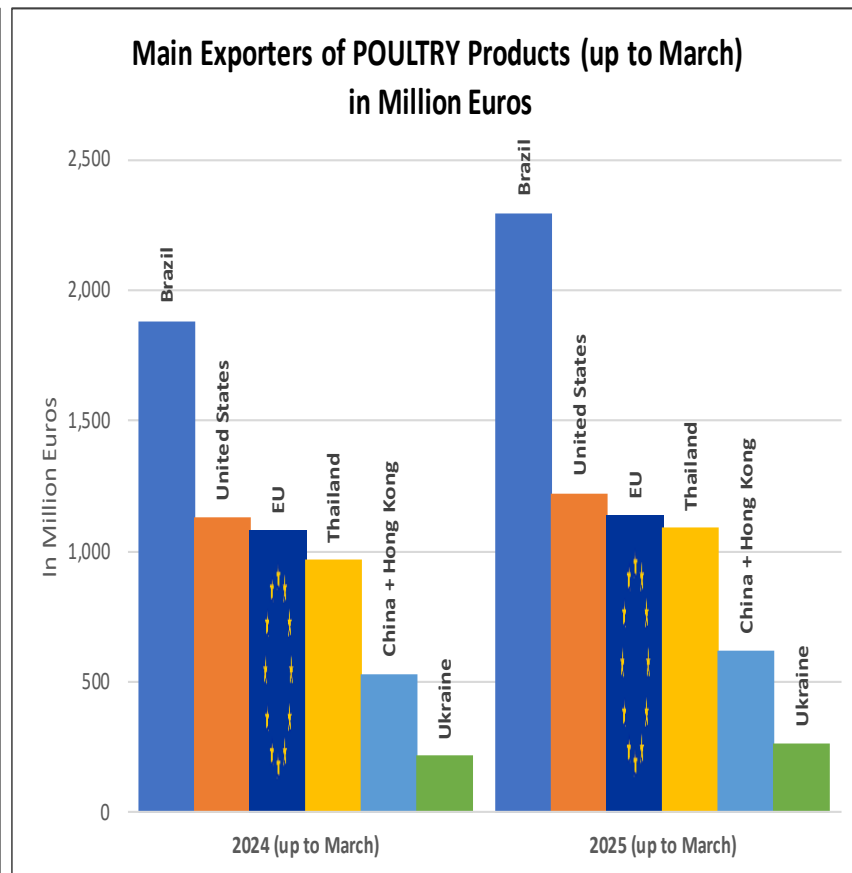
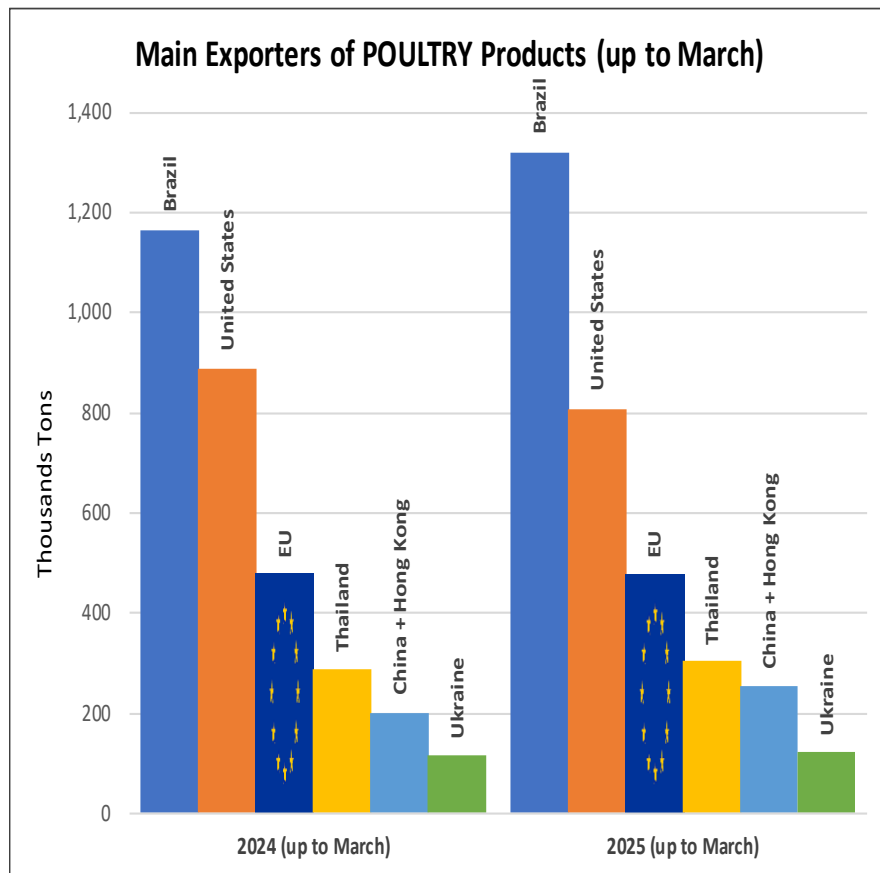
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

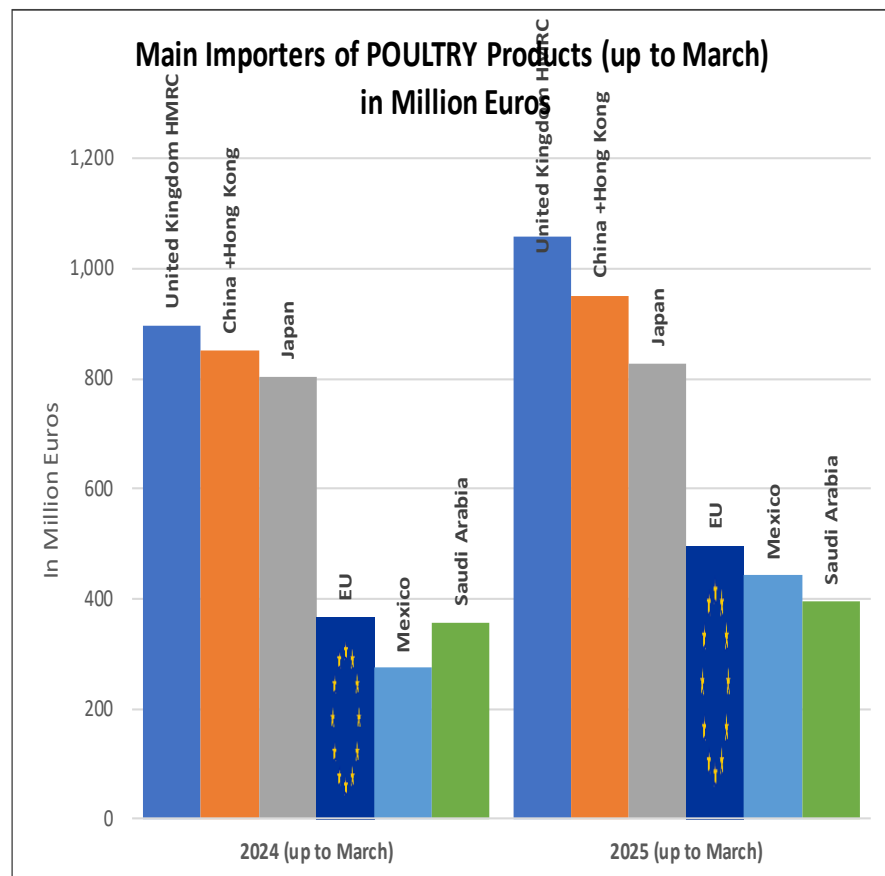
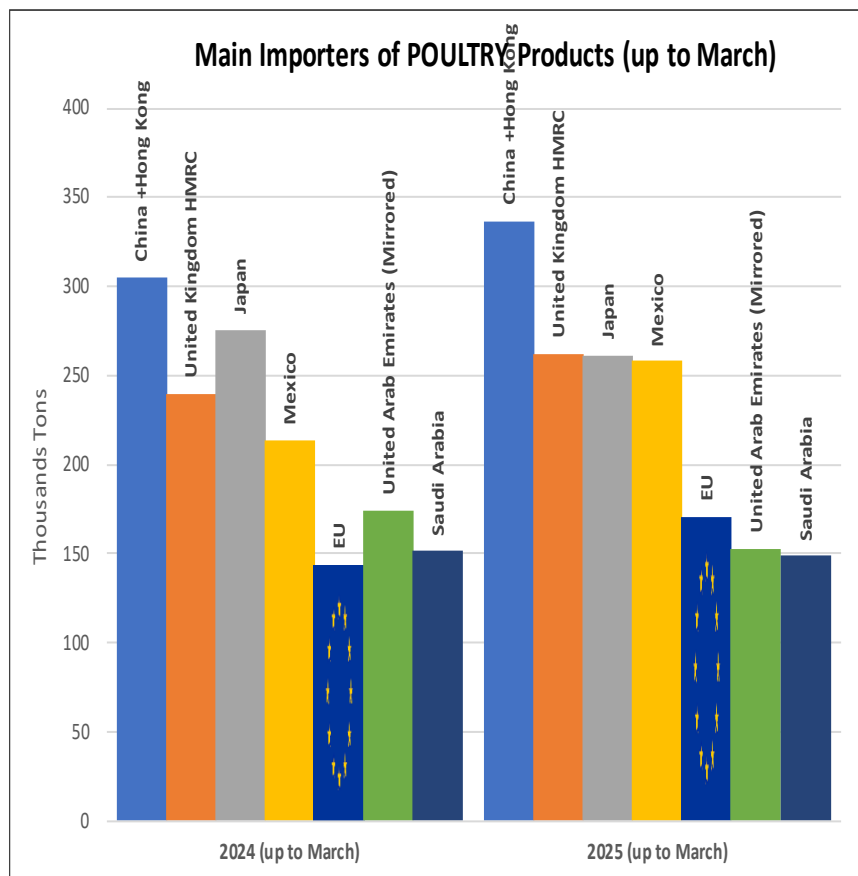
— EU — US — BR



Source: Trade Data Monitor

WORLD MARKET

MAIN IMPORTERS



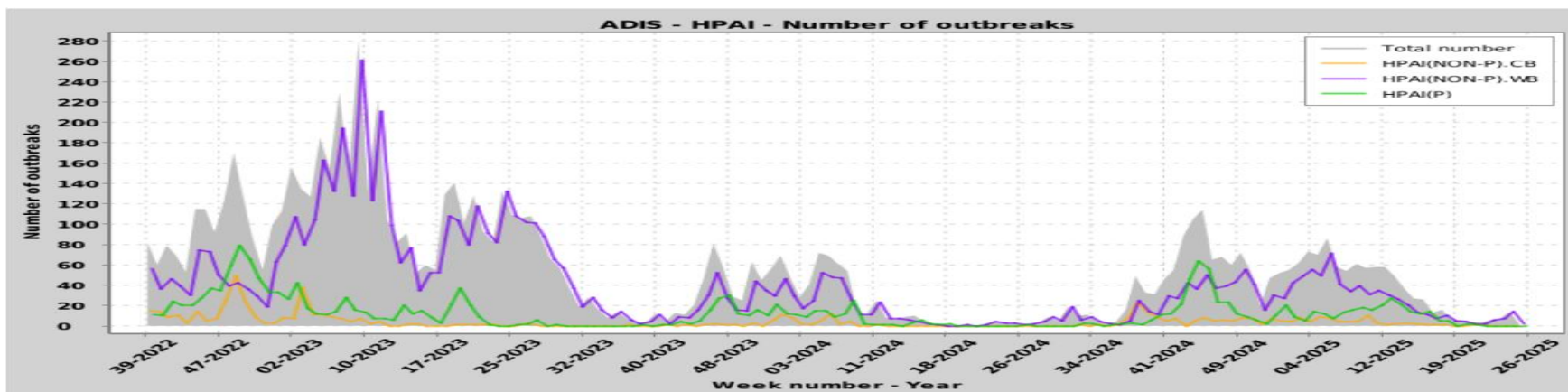
Source: Trade Data Monitor

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 09/07/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
PL	109	10,692,247	21.0%	50.1%
IT	56	4,255,764	10.8%	19.9%
HU	283	4,011,249	54.4%	18.8%
BG	10	558,107	1.9%	2.6%
SK	2	425,260	0.4%	2.0%
DE	22	294,308	4.2%	1.4%
LT	1	246,387	0.2%	1.2%
BE	3	244,136	0.6%	1.1%
NL	5	173,647	1.0%	0.8%
FR	9	162,372	1.7%	0.8%
AT	6	148,001	1.2%	0.7%
<i>Other MS</i>	-504	-21,211,410	-96.9%	-99.3%
Total	2	68	0.4%	0.0%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	27	2,667,295	5.2%	12.5%
Laying hen	62	10,928,154	11.9%	51.2%
Duck	203	2,838,451	39.0%	13.3%
Turkey	90	3,003,241	17.3%	14.1%
Goose	76	400,502	14.6%	1.9%
Pheasant	3	6,569	0.6%	0.0%
Mixed	17	93,507	3.3%	0.4%
No information	42	1,425,097	8.1%	6.7%
Total	520	21,362,816	100.0%	100.0%



EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

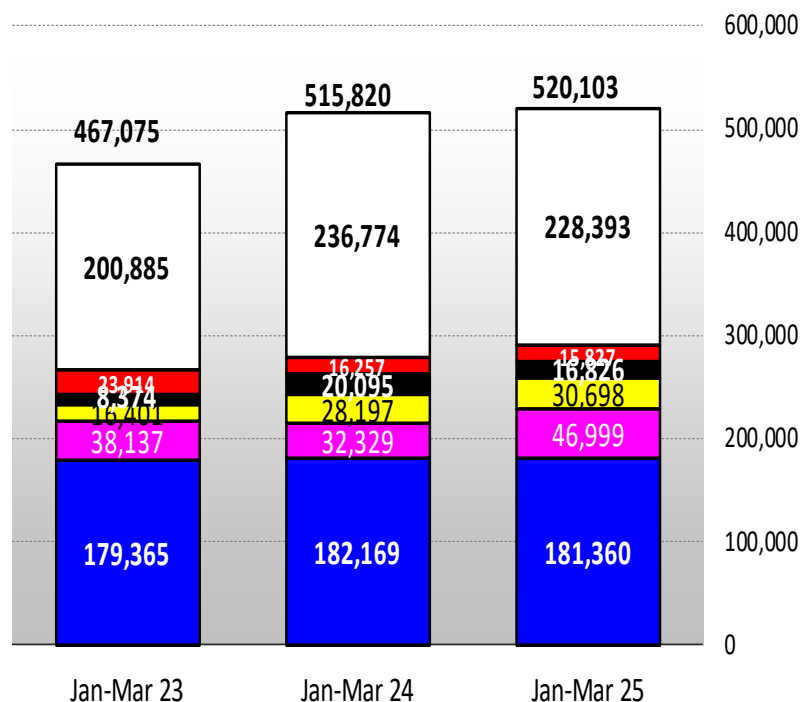
	2021		2022		2023		2024		Jan-Mar 25		Compared to Jan-Mar 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	725,611	32%	747,161	37%	721,833	37%	747,382	35%	181,360	34.9%	- 0.4%
Ghana	228,066	10%	156,456	8%	149,223	8%	154,492	7%	46,999	9.0%	+ 45.4%
Congo (Dem. Rep.)	139,852	6%	125,421	6%	101,020	5%	109,801	5%	30,698	5.9%	+ 8.9%
Vietnam	31,784	1%	29,751	1%	54,230	3%	69,023	3%	16,826	3.2%	- 16.3%
Ukraine	162,267	7%	105,810	5%	84,639	4%	58,716	3%	15,827	3.0%	- 2.6%
Saudi Arabia	58,457	3%	74,590	4%	66,759	3%	66,994	3%	14,473	2.8%	- 19.7%
Congo	30,303	1%	35,562	2%	46,737	2%	55,411	3%	13,674	2.6%	- 4.4%
Mozambique	23,774	1%	26,657	1%	33,049	2%	41,736	2%	12,200	2.3%	+ 95.4%
Philippines	81,155	4%	6,421	0%	4,256	0%	55,858	3%	12,169	2.3%	+ 21.7%
Benin	64,358	3%	63,516	3%	61,286	3%	43,794	2%	12,025	2.3%	+ 68.5%
<i>Other Destinations</i>	706,746	31%	673,589	33%	639,519	33%	743,913	35%	163,852	31.5%	
Extra-EU	2,252,374		2,044,934		1,962,550		2,147,120		520,103		
% change			- 9%		- 4%		+ 9%		+ 0.8%		

EU-27 Exports of poultry meat to selected destinations

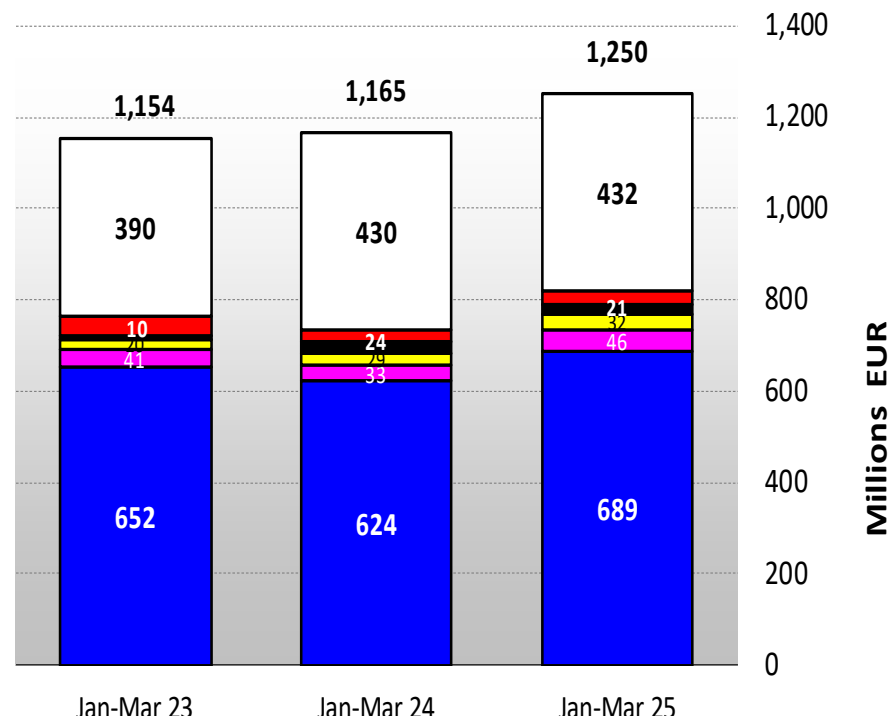
	2021		2022		2023		2024		Jan-Mar 25		Compared to Jan-Mar 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	2,009,674	51%	2,652,567	67%	2,593,946	65%	2,681,547	68%	689,058	17.3%	+ 10.5%
Ghana	224,103	6%	167,715	4%	156,970	4%	153,988	4%	45,828	1.2%	+ 40.2%
Congo (Dem. Rep.)	116,553	3%	145,766	4%	112,110	3%	112,142	3%	32,355	0.8%	+ 12.2%
Vietnam	35,592	1%	39,533	1%	67,641	2%	86,150	2%	21,312	0.5%	- 10.5%
Ukraine	119,533	3%	102,729	3%	125,678	3%	106,385	3%	30,385	0.8%	+ 16.5%
Saudi Arabia	93,283	2%	159,672	4%	128,754	3%	138,371	3%	25,479	0.6%	- 33.7%
Congo	26,636	1%	36,276	1%	42,776	1%	47,477	1%	10,517	0.3%	- 17.7%
Mozambique	16,391	0%	20,457	1%	25,923	1%	30,847	1%	8,437	0.2%	+ 59.8%
Philippines	57,220	1%	7,793	0%	6,571	0%	34,778	1%	6,382	0.2%	+ 4.1%
Benin	87,264	2%	106,959	3%	103,984	3%	60,680	2%	21,695	0.5%	+ 127.0%
Other Destinations	1,186,106	30%	1,296,859	33%	1,381,883	35%	1,503,313	38%	359,009	9.0%	
Extra-EU	3,972,355		4,736,325		4,746,236		4,955,678		1,250,457		
% change			+ 19%		+ 0%		+ 4%		+ 7.3%		

EU-27 poultry meat exports (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)

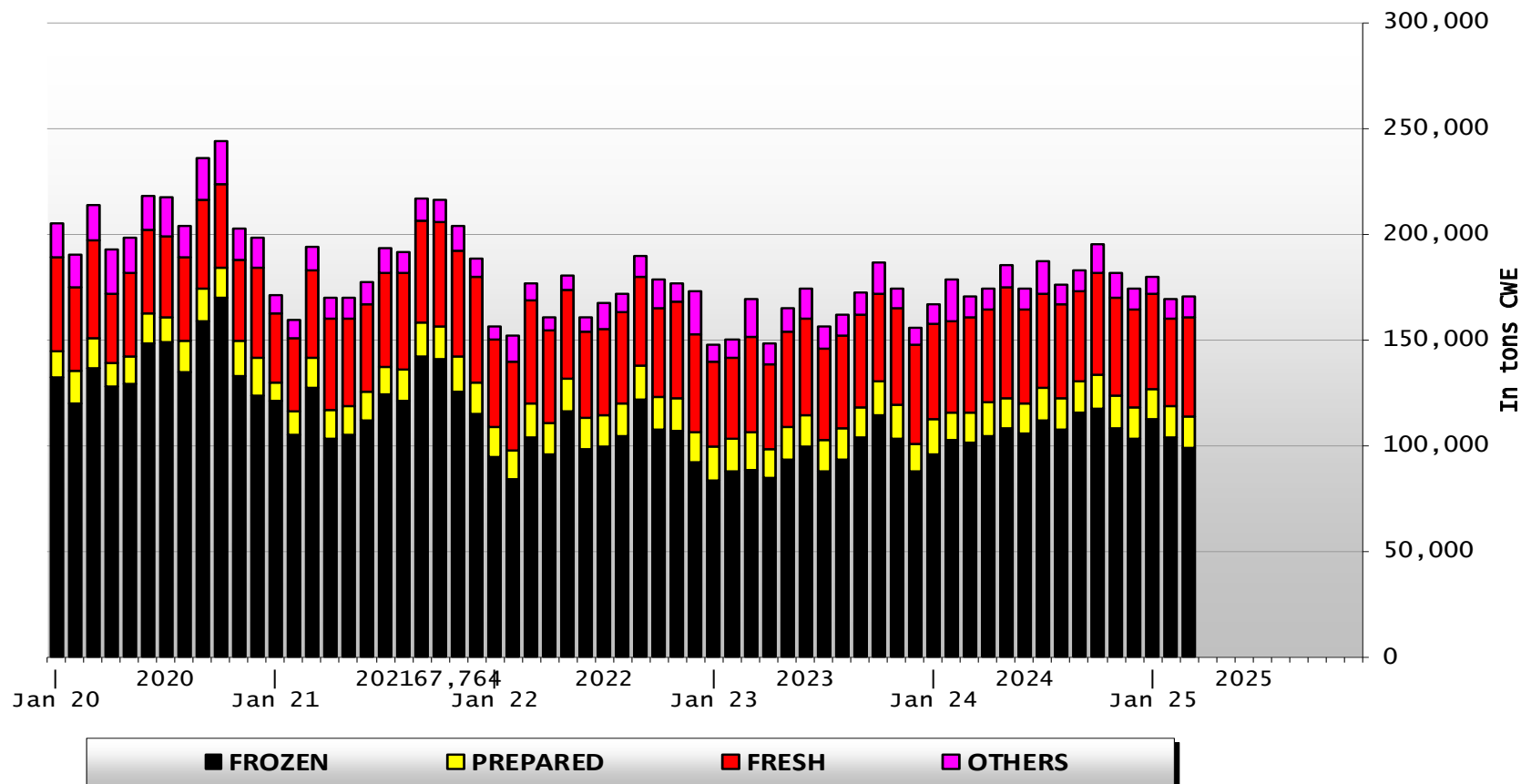


EU EXPORTS of Poultry Meat (Millions EUR)



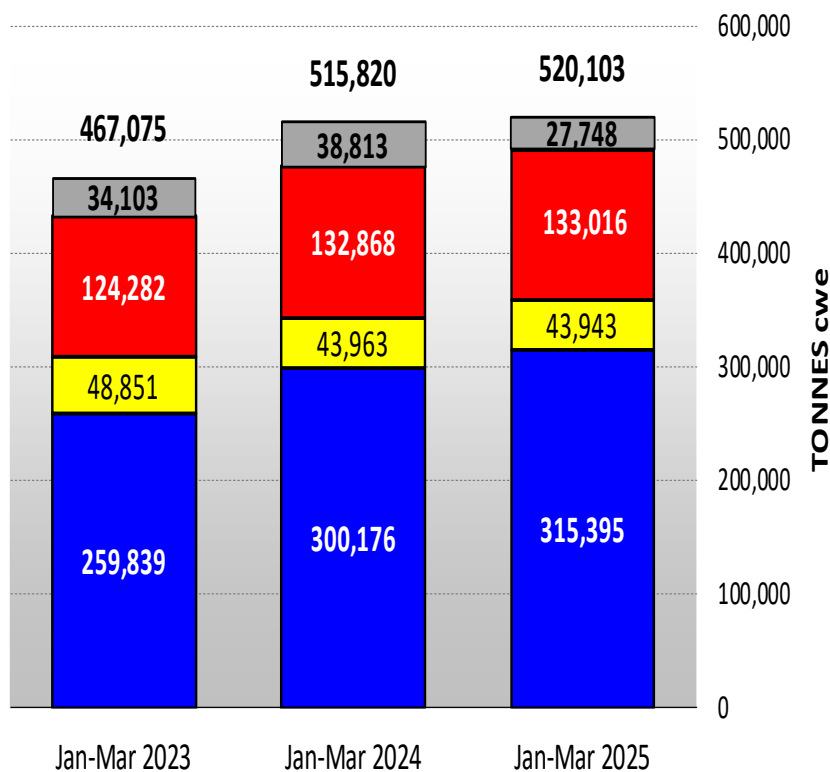
* countries trading less than 25 ('Millions EUR)

Exports of selected Poultry products



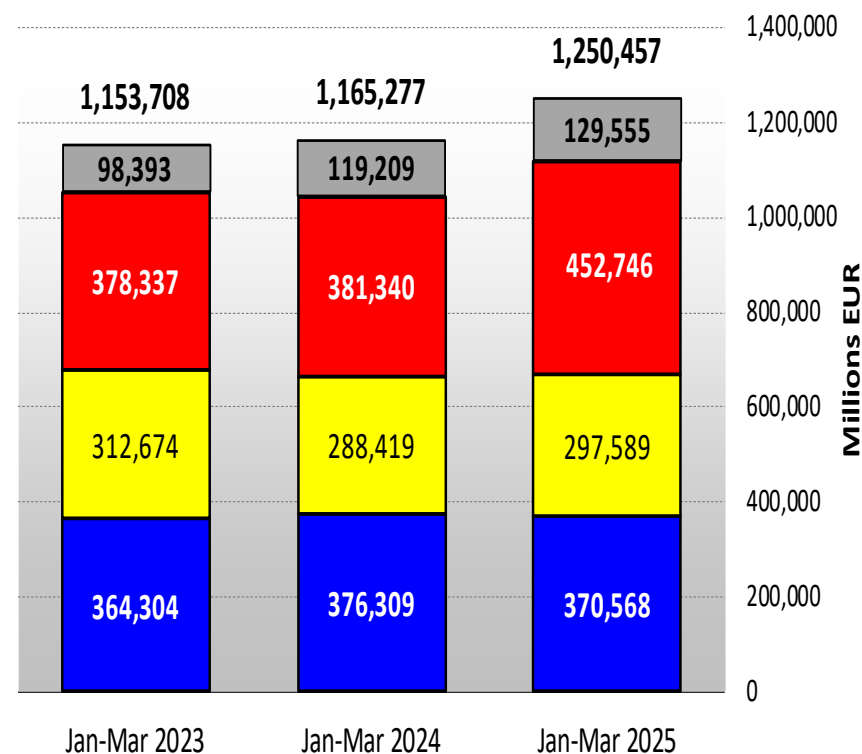
EU-27 poultry meat exports (by meat type)

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

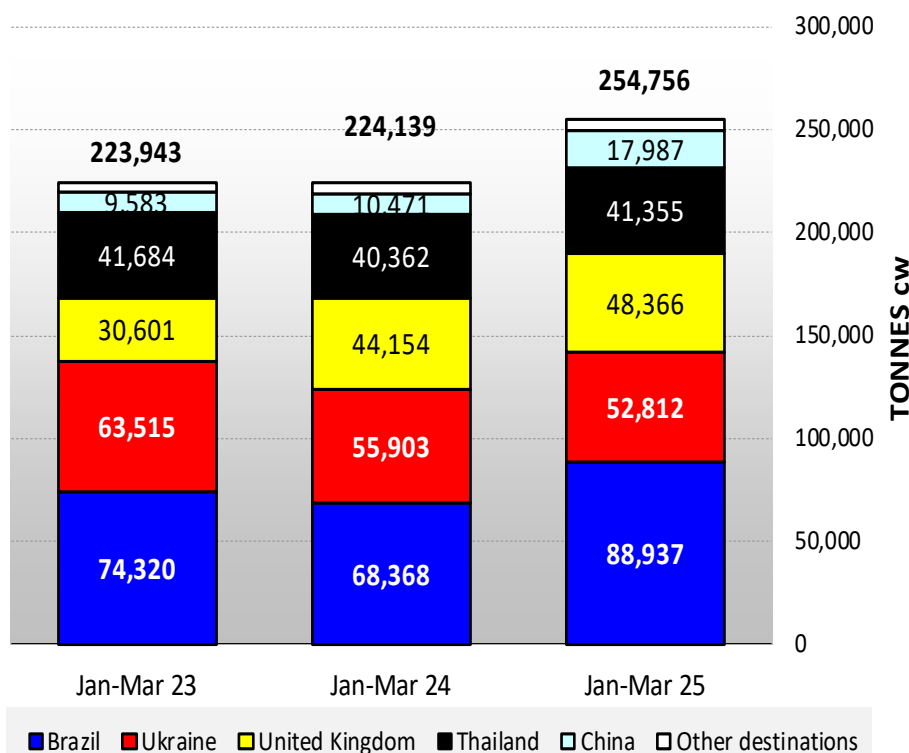
	2021		2022		2023		2024		Jan-Mar 25		Compared to Jan-Mar 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	251,887	32%	299,536	35%	288,723	32%	286,487	32%	88,937	34.9%	+ 30.1%
Ukraine	102,892	13%	160,697	19%	231,906	26%	194,484	22%	52,812	20.7%	- 5.5%
United Kingdom	274,667	34%	210,738	25%	171,949	19%	197,012	22%	48,366	19.0%	+ 9.5%
Thailand	130,658	16%	131,954	15%	148,698	17%	157,579	17%	41,355	16.2%	+ 2.5%
China	20,916	3%	32,864	4%	36,561	4%	45,181	5%	17,987	7.1%	+ 71.8%
Argentina	3,151	0%	4,096	0%	4,079	0%	6,711	1%	2,580	1.0%	+++
Norway	2,508	0%	2,094	0%	2,126	0%	3,240	0%	760	0.3%	+ 34.6%
Other Destinations	10,378	1%	9,447	1%	11,266	1%	11,795	1%	1,959	0.8%	
Extra-EU	797,056		851,427		895,307		902,489		254,756		
% change			+ 7%		+ 5%		+ 1%		+ 13.7%		

EU-27 Imports of poultry meat from selected origins

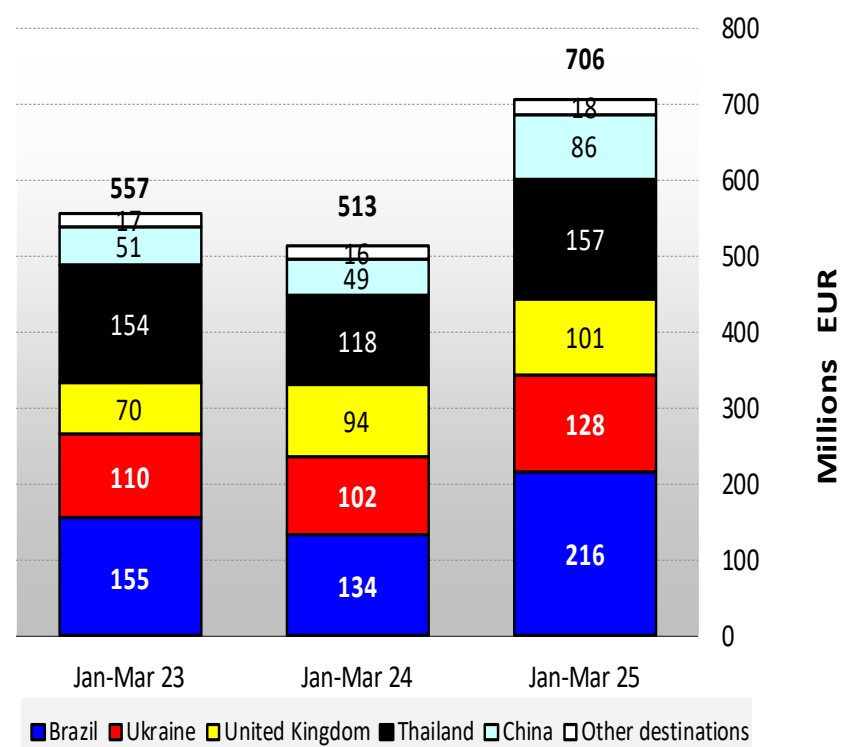
	2021		2022		2023		2024		Jan-Mar 25		Compared to Jan-Mar 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	388,472	29%	669,772	31%	598,220	28%	623,798	28%	216,095	30.6%	+ 61.3%
Ukraine	166,208	12%	324,836	15%	418,449	20%	400,671	18%	128,031	18.1%	+ 25.3%
United Kingdom	327,273	24%	369,160	17%	354,848	17%	401,532	18%	100,732	14.3%	+ 7.2%
Thailand	317,487	24%	519,175	24%	490,197	23%	491,373	22%	157,358	22.3%	+ 33.8%
China	95,081	7%	186,175	9%	183,071	9%	207,948	9%	85,565	12.1%	+ 75.8%
Argentina	6,508	0%	11,463	1%	11,360	1%	16,070	1%	5,759	0.8%	+++
Norway	7,914	1%	8,286	0%	8,888	0%	10,538	0%	3,479	0.5%	+ 67.6%
Switzerland	5,300	0%	8,975	0%	6,730	0%	6,205	0%	1,390	0.2%	- 10.8%
Moldova			13	0%			344	0%	1,018	0.1%	+++
Chile	6,019	0%	1,537	0%	7,254	0%	7,910	0%	871	0.1%	- 76.8%
<i>Other Destinations</i>	25,811	2%	29,664	1%	29,552	1%	29,866	1%	5,488	0.8%	
Extra-EU	1,346,074		2,129,057		2,108,569		2,196,255		705,785		
% change			+ 58%		- 1%		+ 4%		+ 37.7%		

EU27 poultry meat imports (by origin)

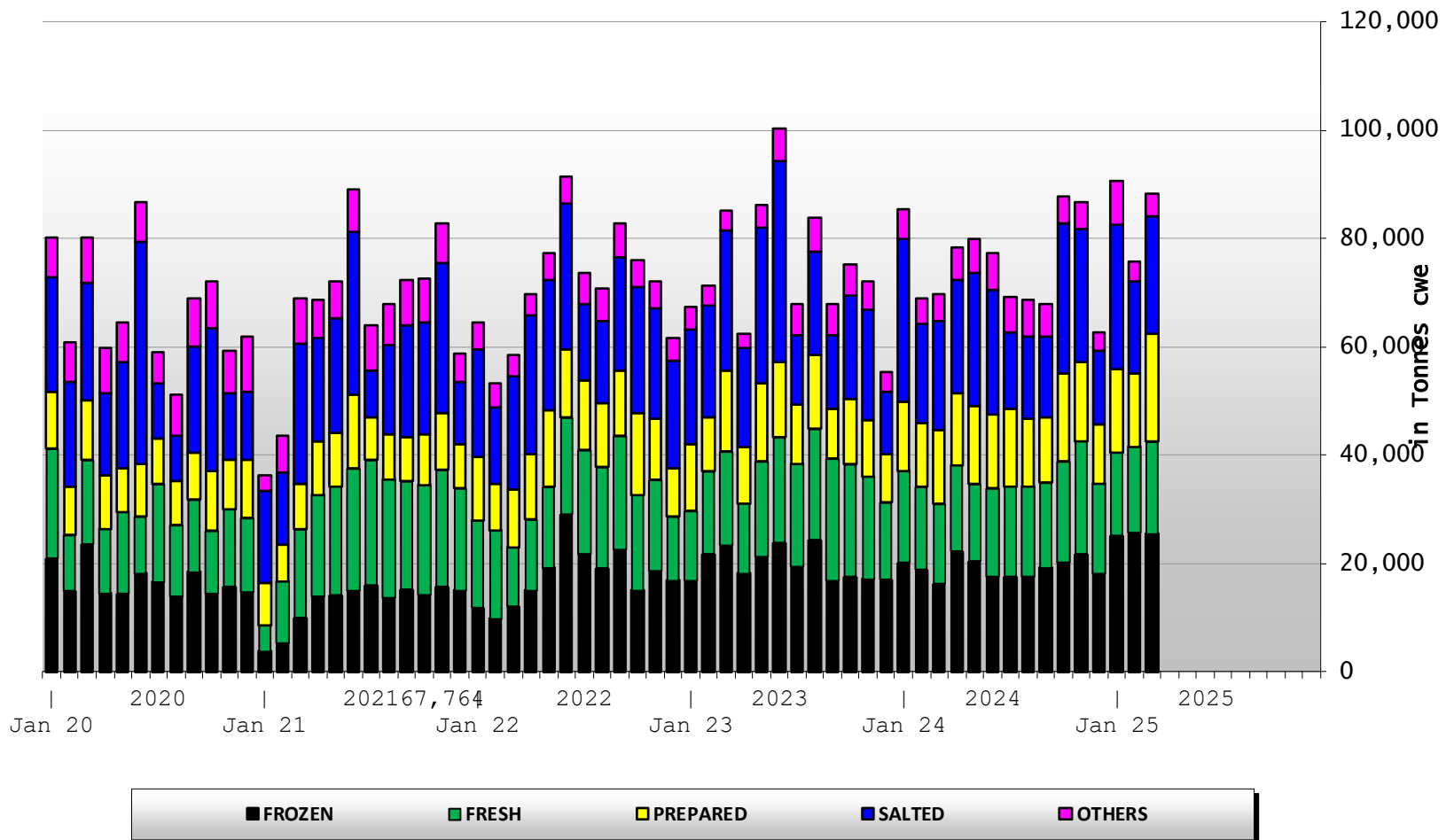
EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)

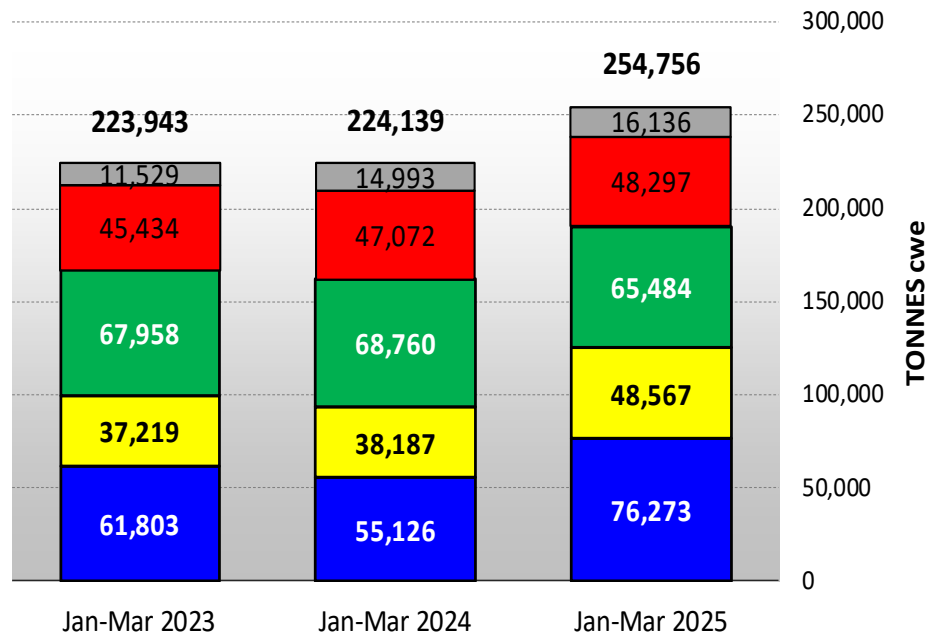


Imports of selected Poultry products

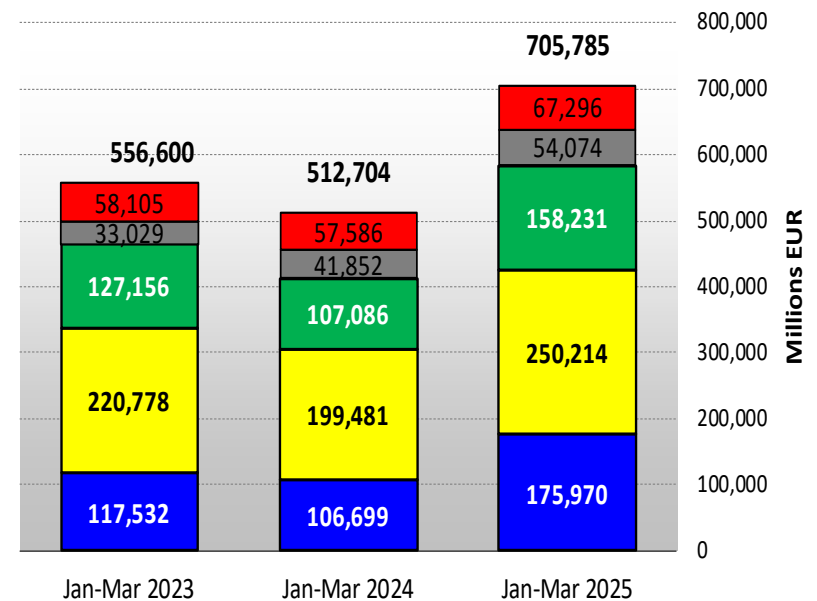


EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)



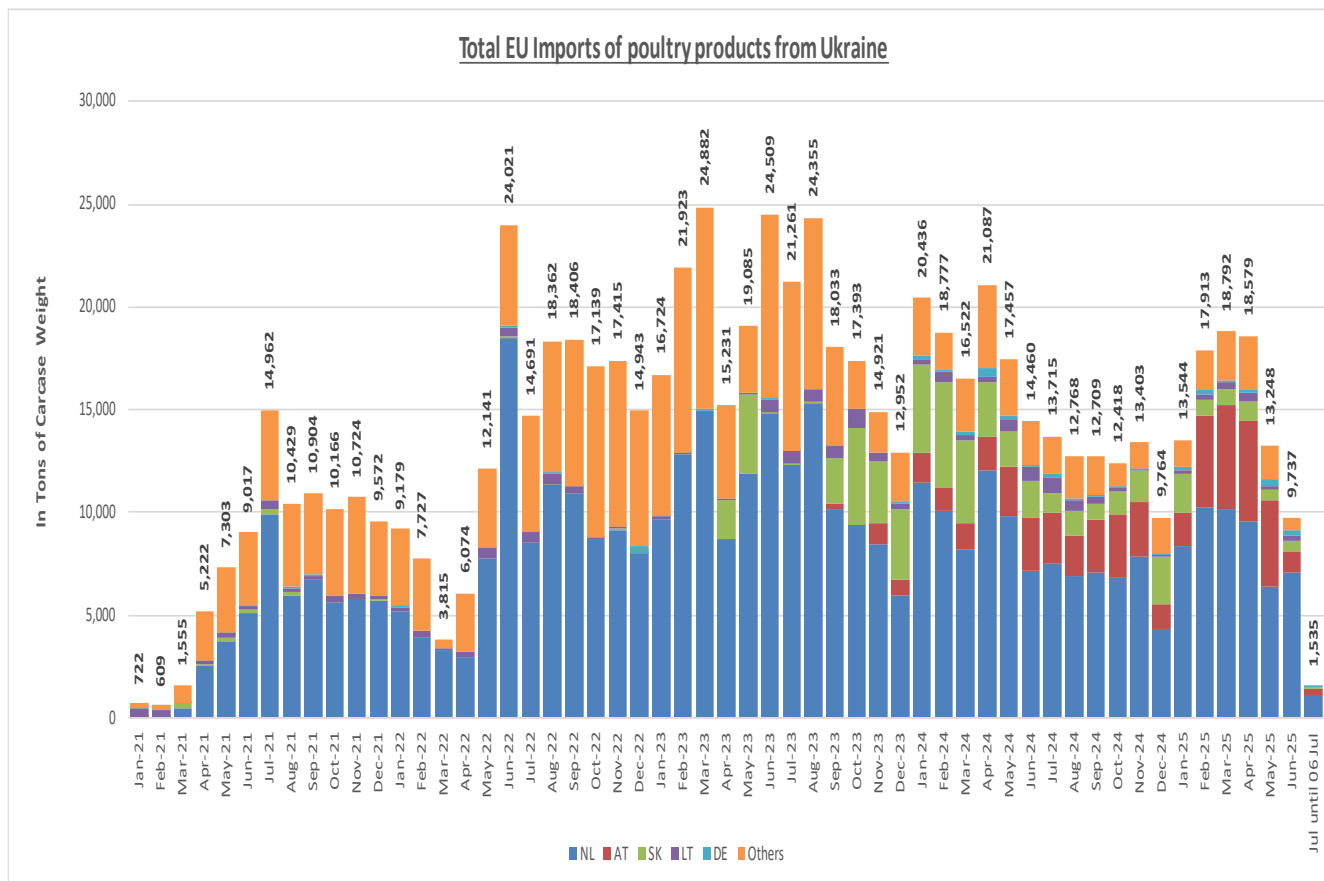
■ FROZEN ■ PREPARED ■ SALTED ■ FRESH ■ OTHERS

■ FROZEN ■ PREPARED ■ SALTED ■ OTHERS ■ FRESH

TRADE

EU IMPORTS

EU Market Situation for Poultry

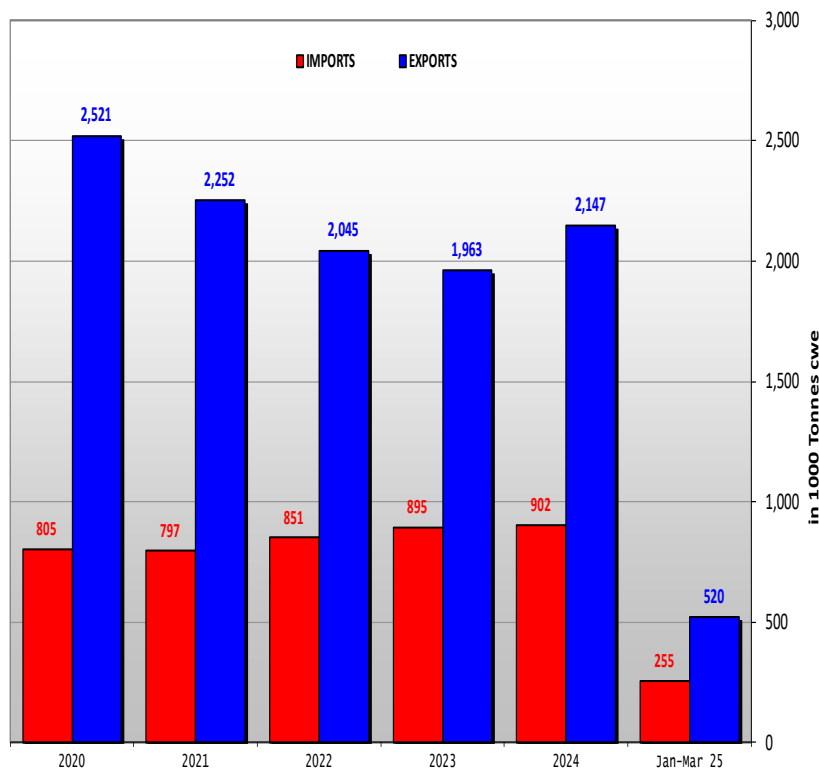


	2022	2023	2024	2025 (until 06 Jul)
Poultry EU total	187,968	231,270	183,516	93,347
NL	98,192	134,421	99,124	52,881
AT	0	2,186	24,530	21,628
SK	131	19,456	27,610	5,466
PL	38,127	26,862	4,943	2,841
EL	112	769	3,103	1,814
LT	3,455	4,282	4,439	1,760
IT	257	1,245	1,097	1,430
DE	717	158	1,779	1,260
ES	0	1,895	2,140	1,160
BG	23	67	1,470	949
CZ	527	971	3,357	745
CY	98	140	1,094	647
RO	1,627	3,947	7,655	311
PT	0	0	49	141
EE	1	88	320	140
HU	20,565	34,055	261	122
LV	0	105	0	28
BE	0	98	55	23
IE	0	31	0	0
FI	0	0	0	0
FR	66	473	491	0
SE	15	22	0	0



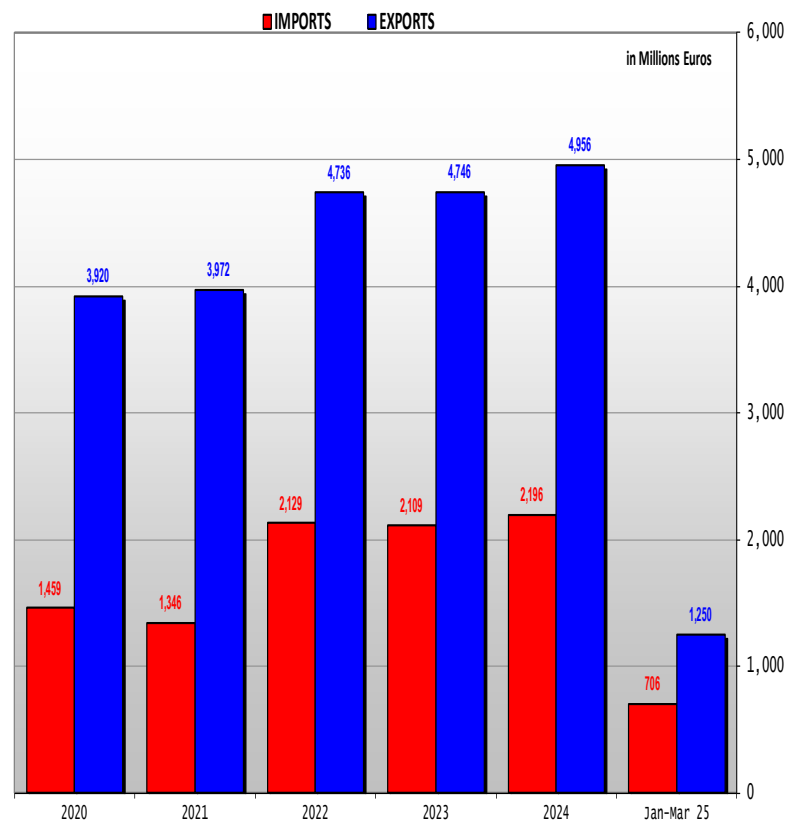
TRADE

in 1000 tons cwe



BALANCE

in million EUR



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>

Thank you



© European Union 2024

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

