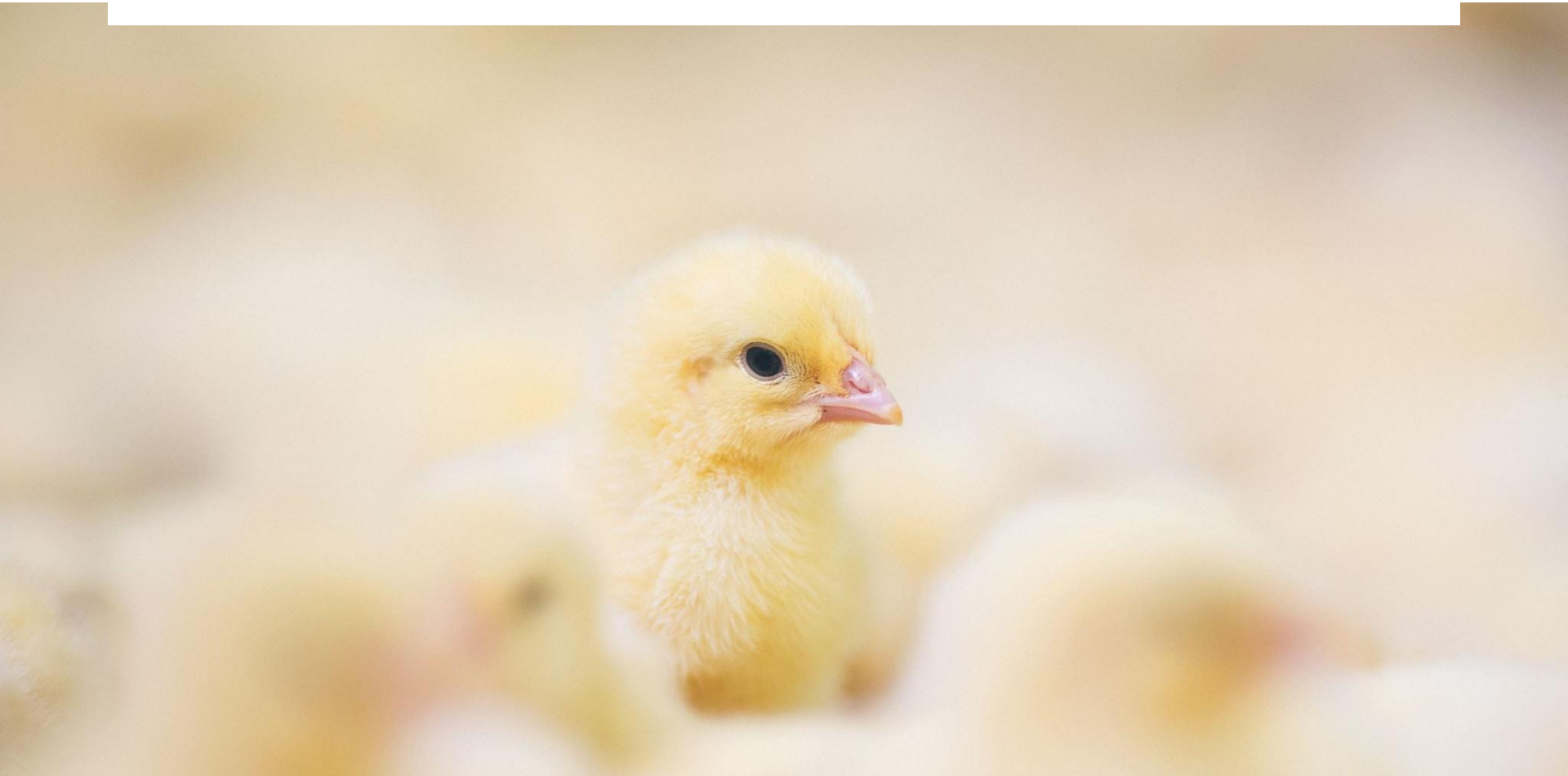


Market Situation for Poultry

CMO GREX on Animal Products - *28 August 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%	↓

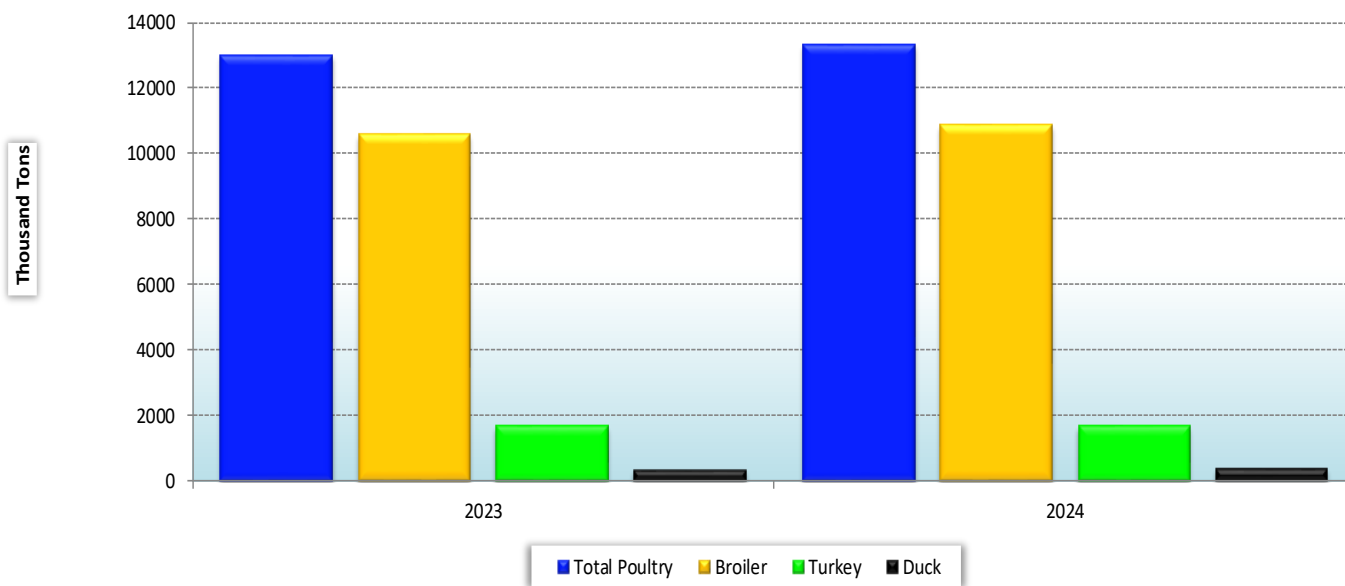
EU production of broiler					
	Qty in Tonnes		% change		
	Source : Eurostat & Forecast 2025 by MS				
	2023	2024	%2024/2023	trend 2025/2024	
PL	2,231,610	2,284,950		2.4	↑
ES	1,349,990	1,401,860		3.8	↑
FR	1,114,430	1,128,280		1.2	↑
DE	1,076,000	1,083,000		0.7	↑
IT	993,950	1,083,180		9.0	↓
NL	863,970	849,620		-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	↑

[illegible]

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT PT

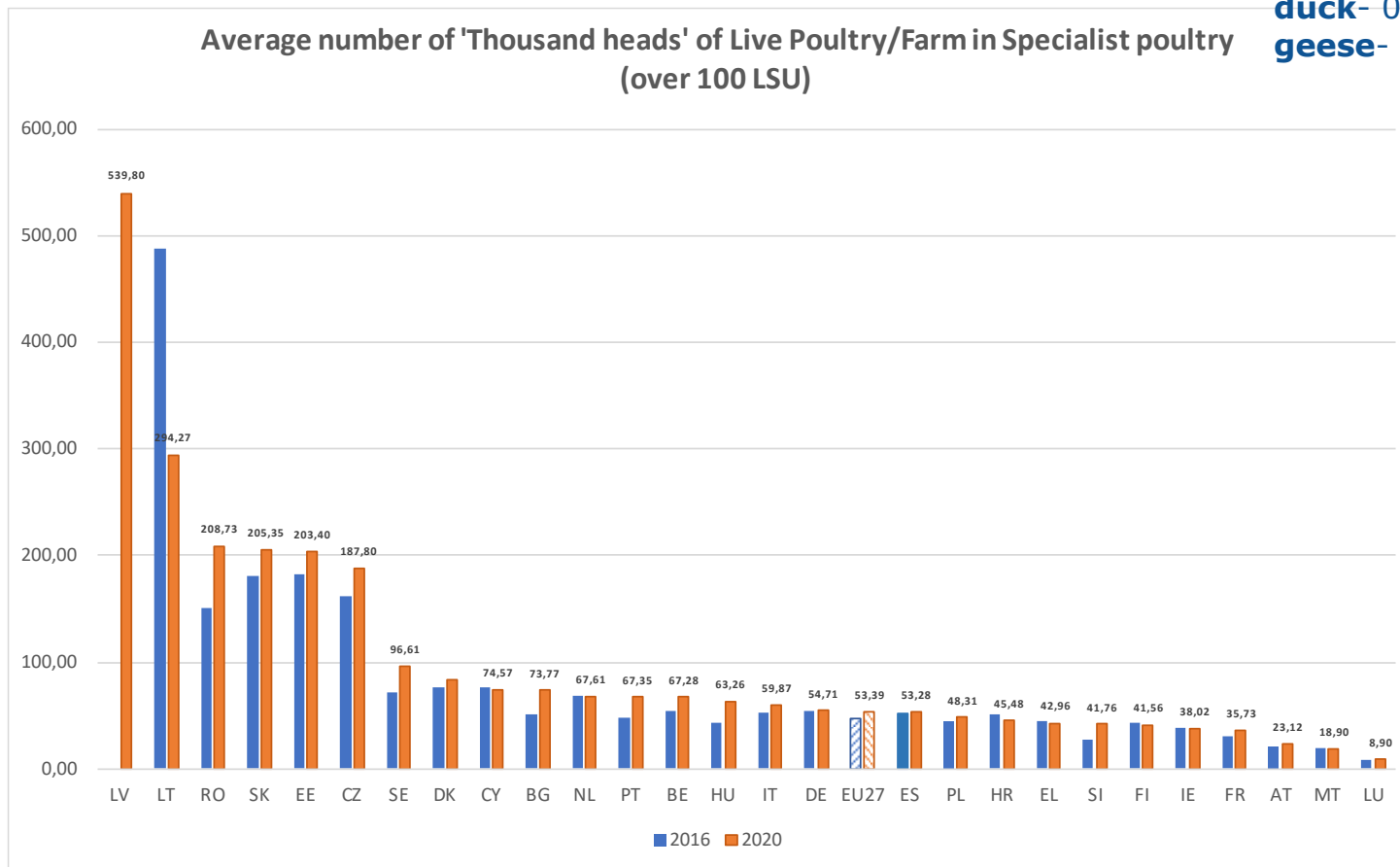


	2023	2024	% 2024/ 2023	% 2025/ 2024
Total Poultry	12,974	13,319	+ 2.7%	↑
Broiler	10,588	10,857	+ 2.5%	↑
Turkey	1,651	1,667	+ 1.0%	↓
Duck	314	351	+ 11.8%	↑

* 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

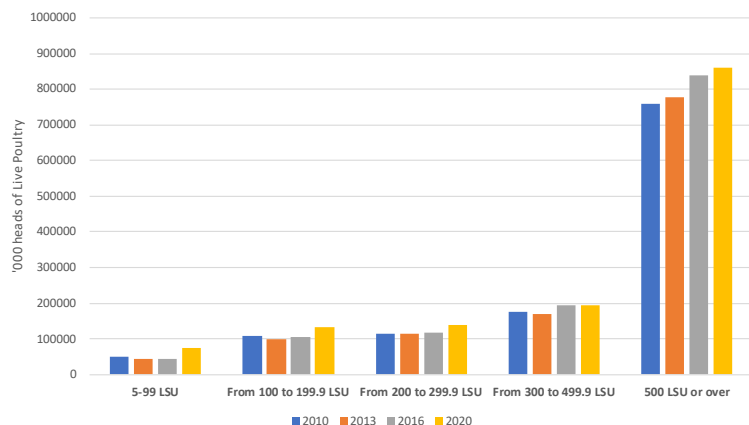


Specialist poultry - EU

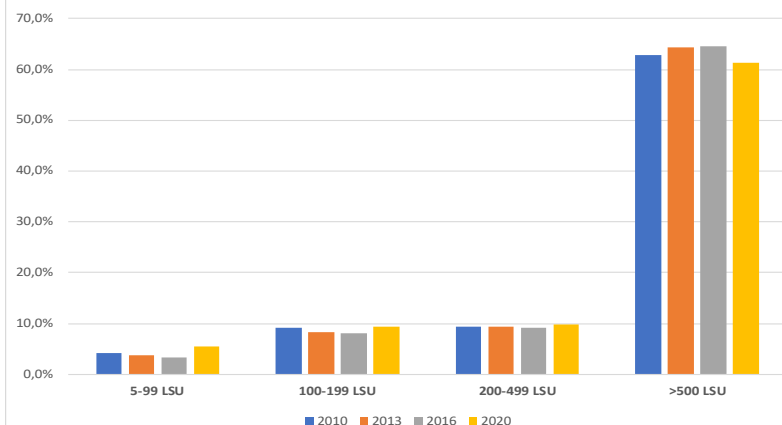
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-7% compared to 2016)
- 14.167.720 LSU in 2020 (-11% compared to 2016)

FARM STRUCTURE SURVEY

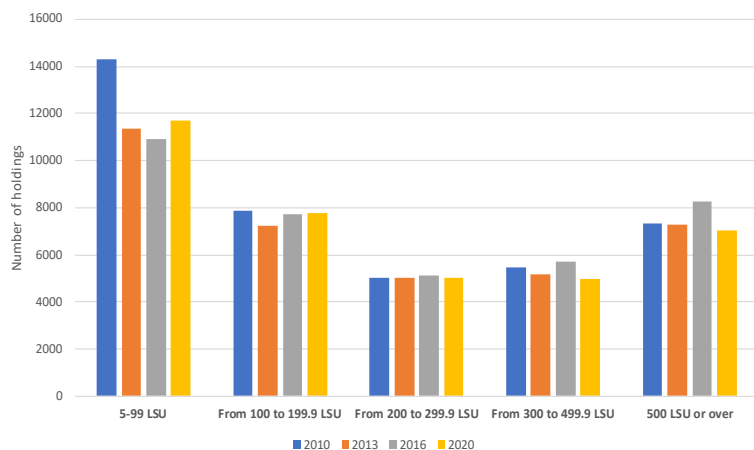
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



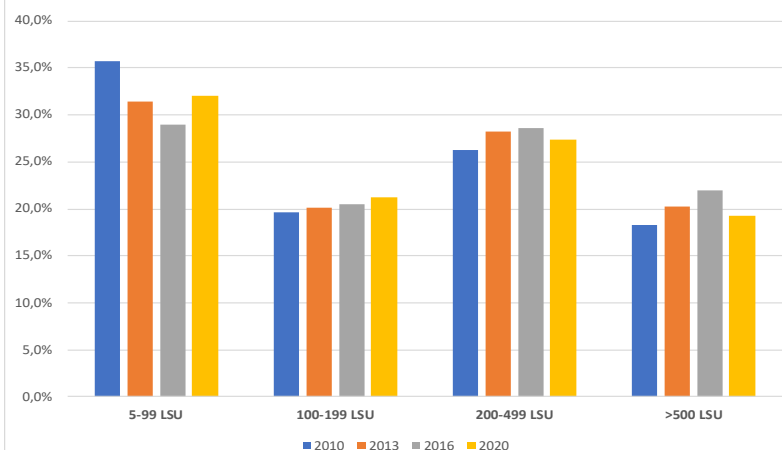
Share of animals by LSU class (over 5 LSU)



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

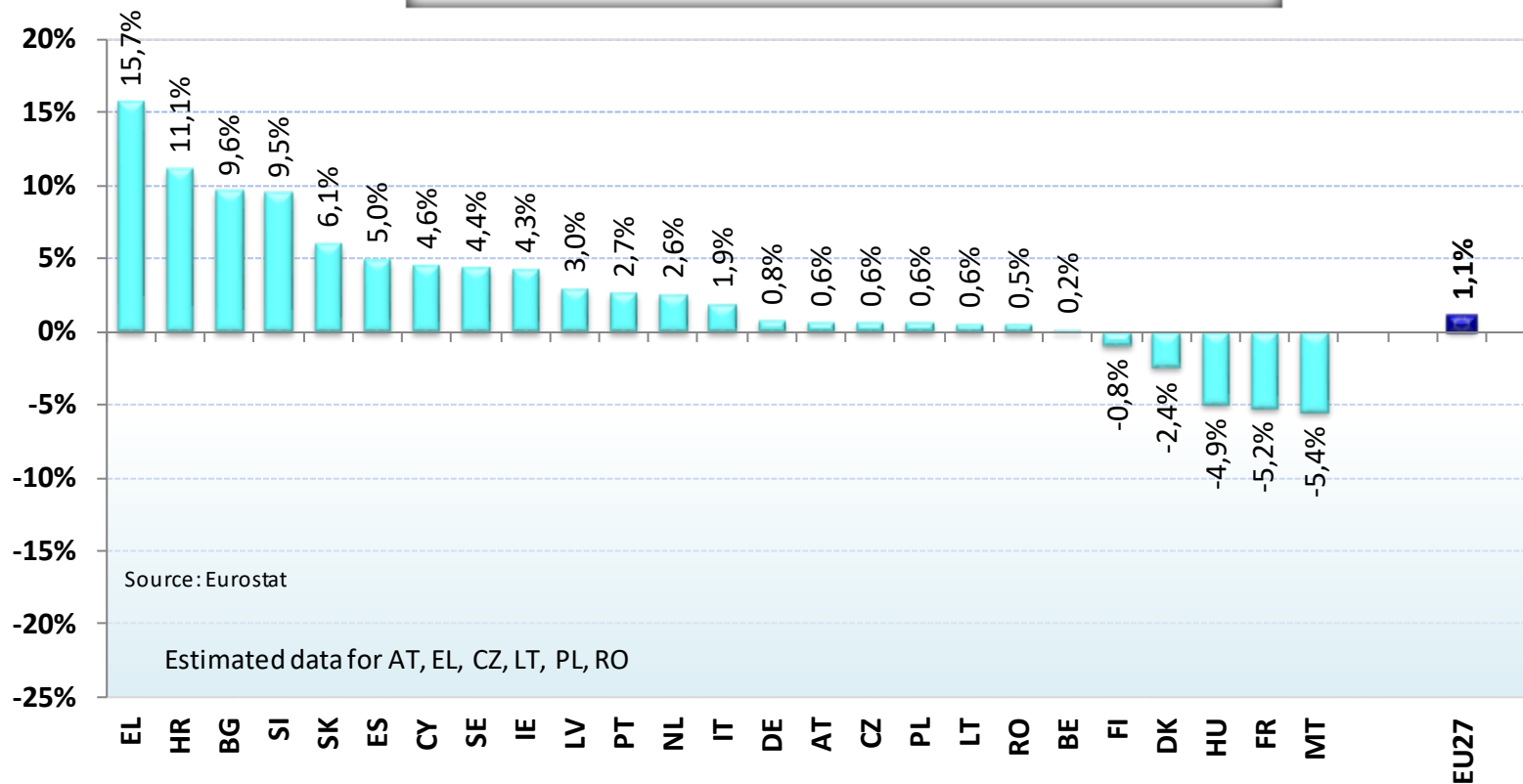


Share of holdings by LSU class (over 5 LSU)

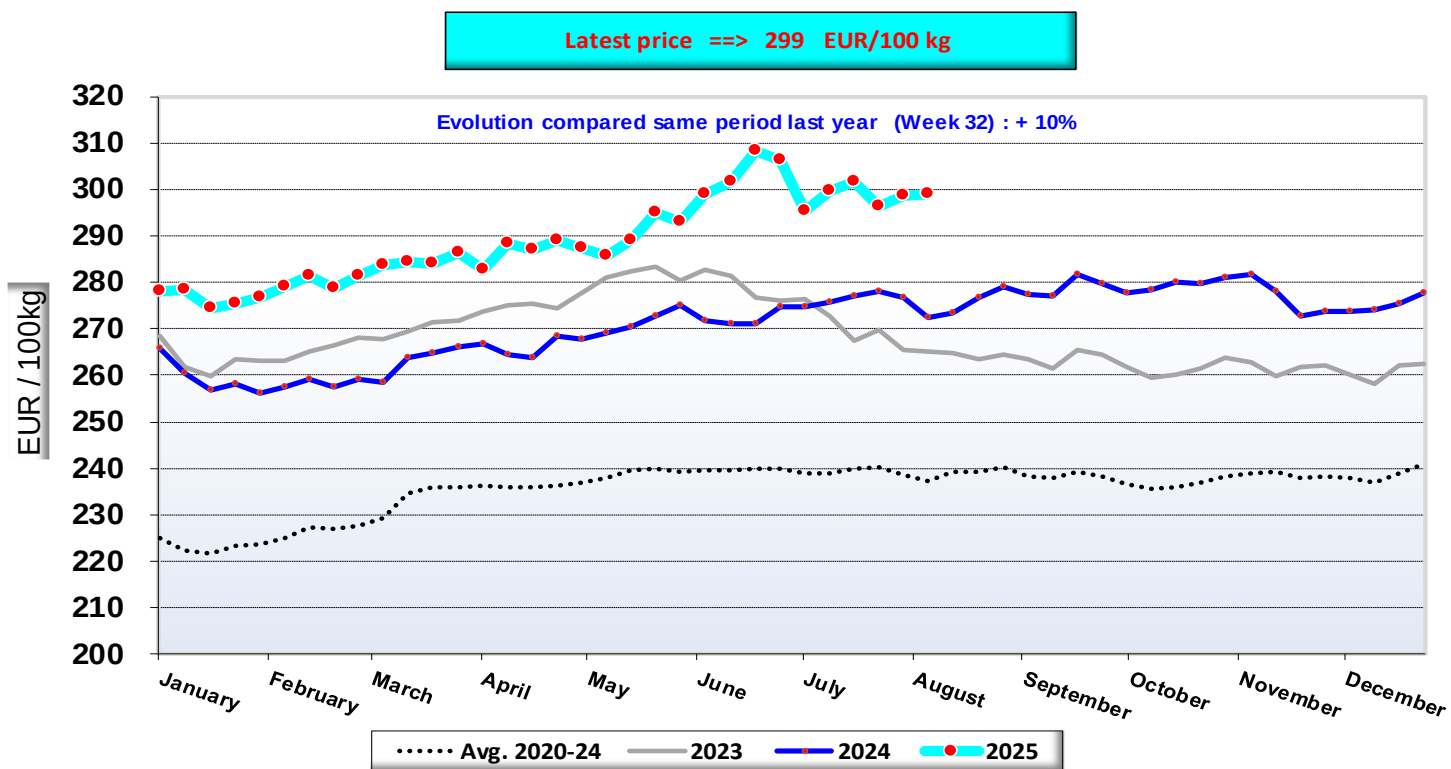


PRODUCTION

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



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

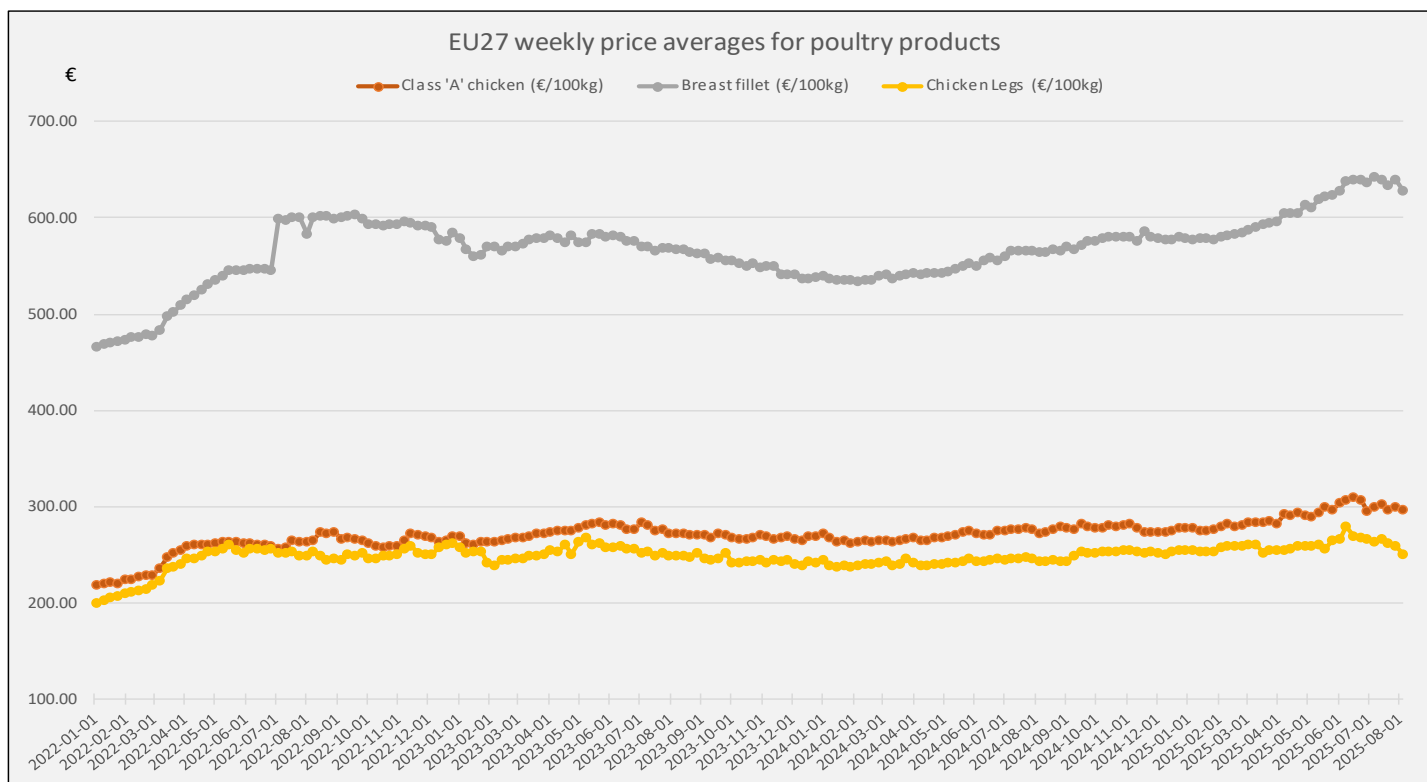


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 32

EU27 weekly price averages for poultry products



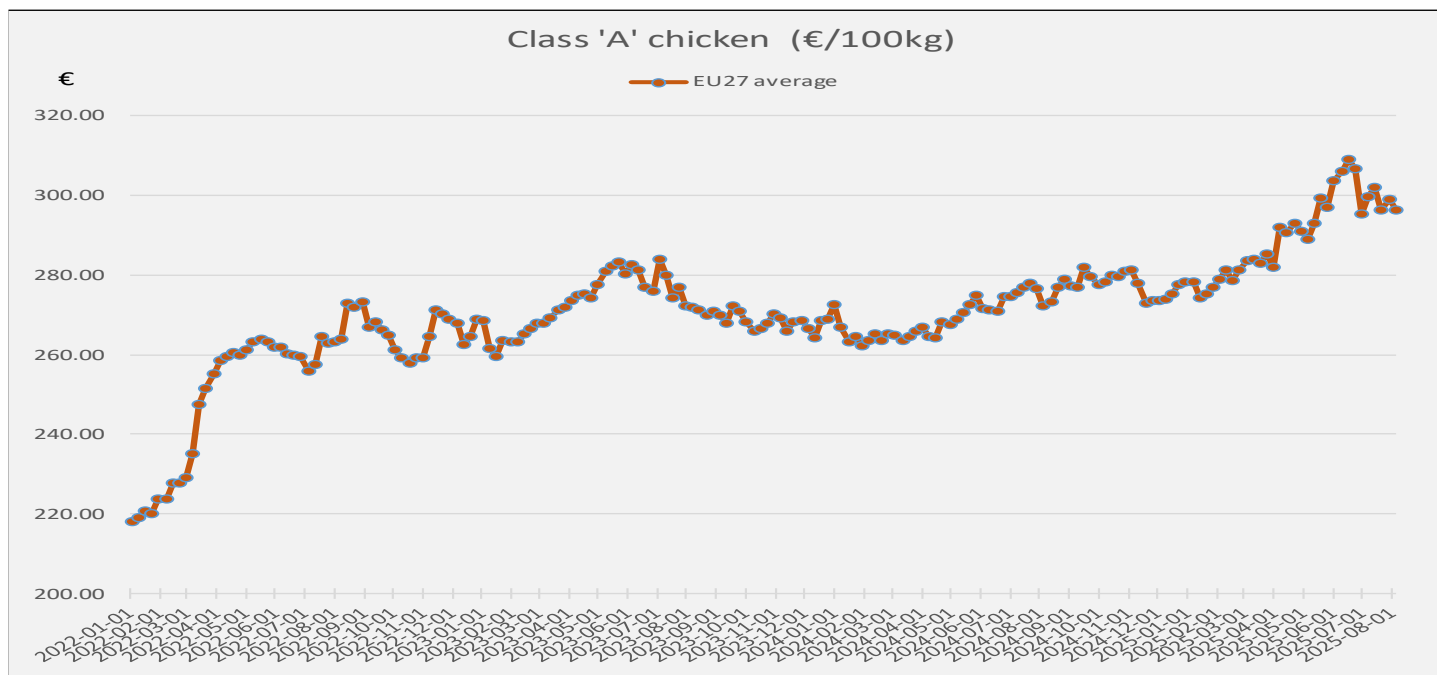
Week - 32	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	296.53	628.87	250.44

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 - 32 Class 'A' chicken

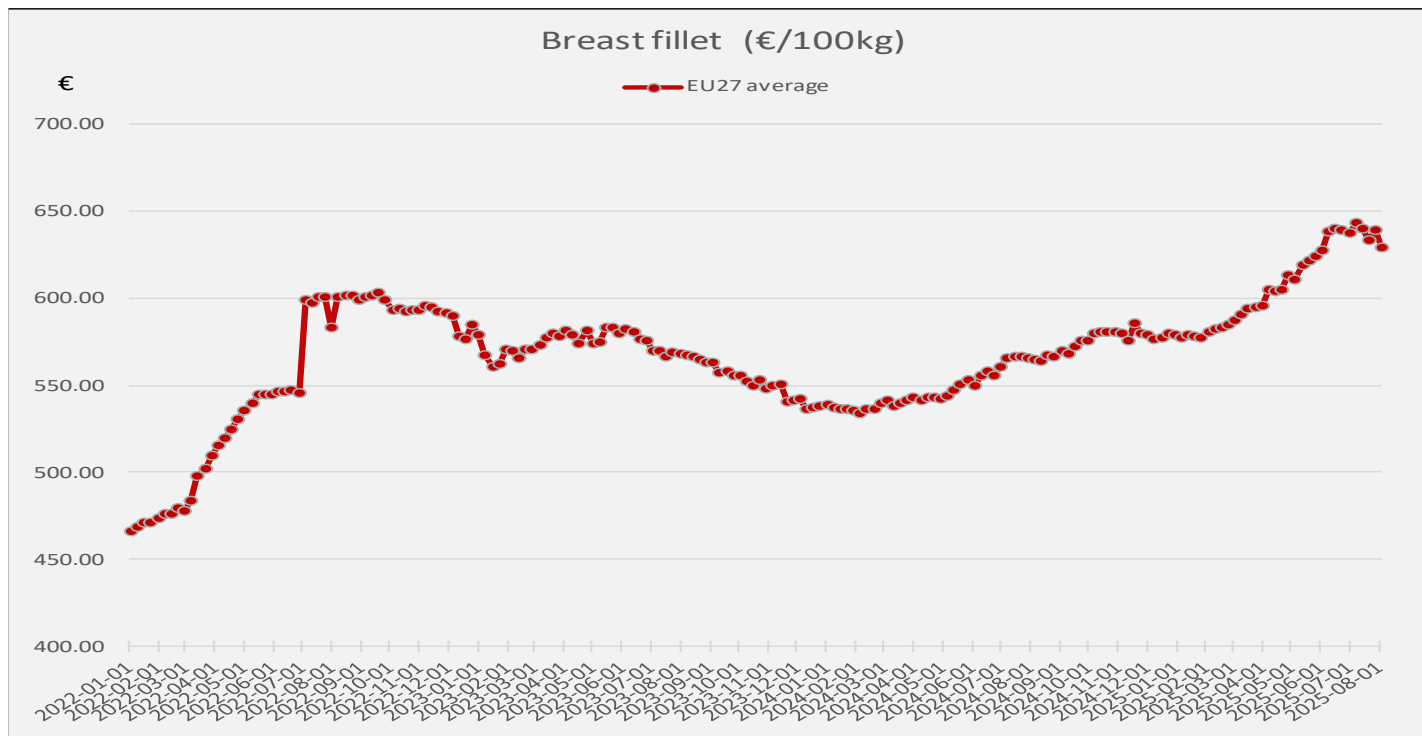


Week - 32	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	296.53	- 0.8%	- 1.1%	+ 8.9%

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 - 32 Breast fillet



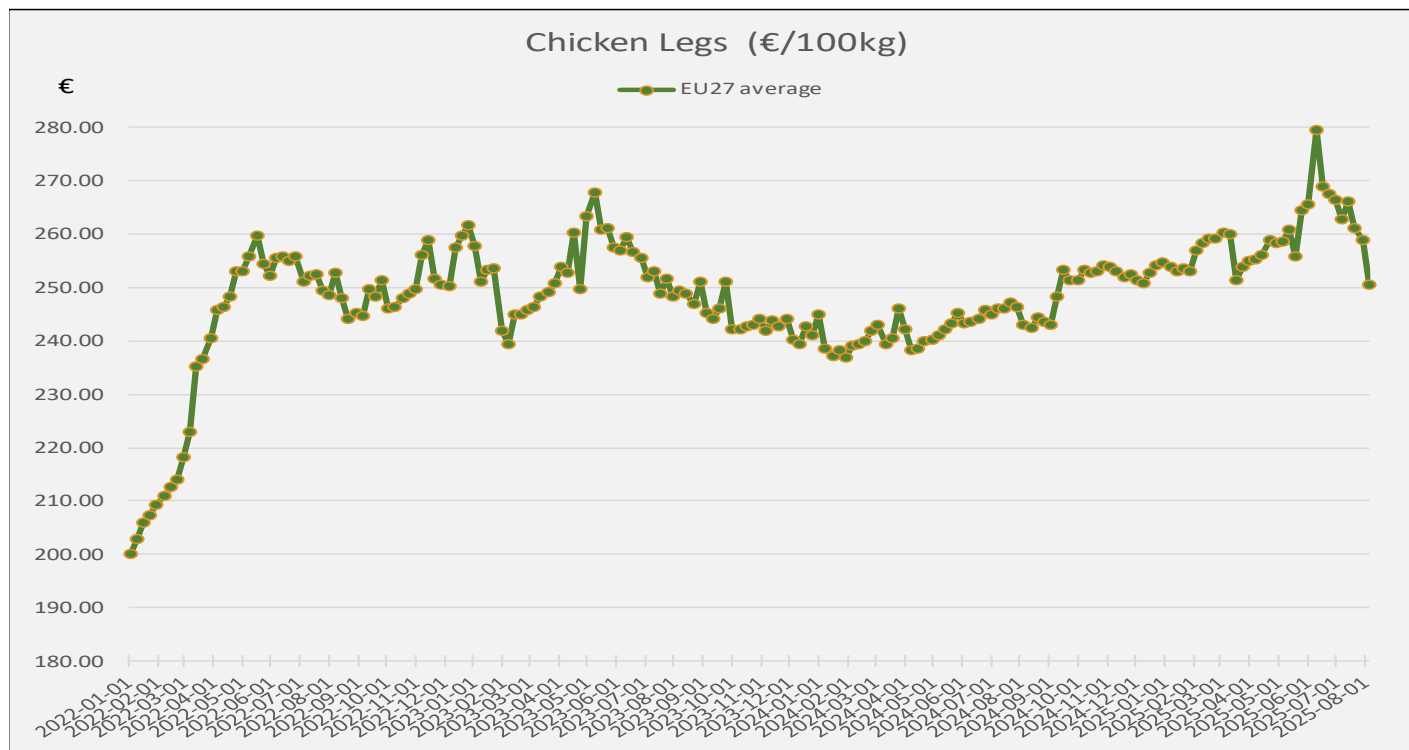
Week - 32	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	628.87	- 1.7%	- 2.2%	+ 11.3%

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'

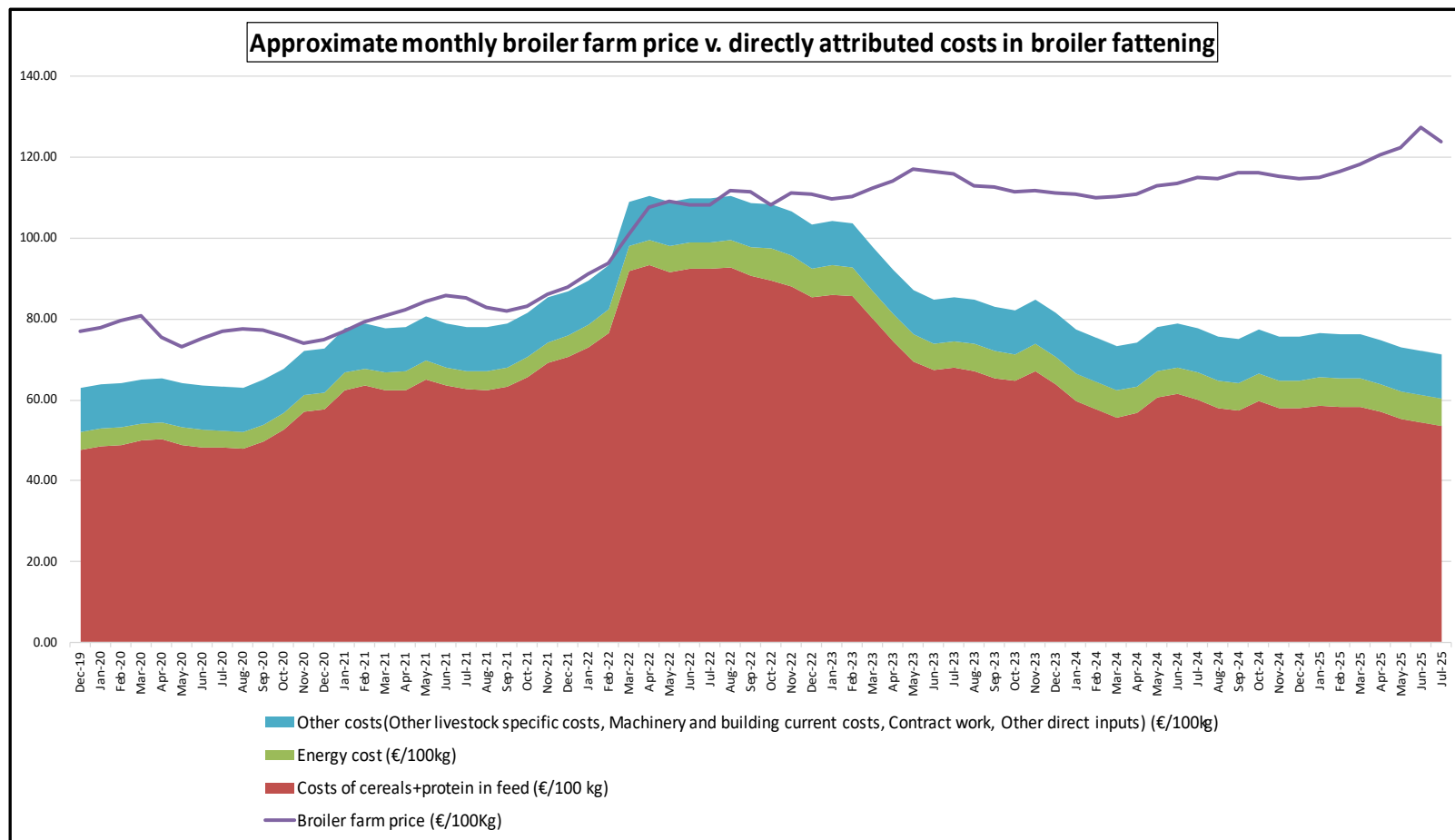
Week - 32 Chicken Legs



Week - 32	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	250.44	- 3.3%	- 4.7%	+ 3.0%

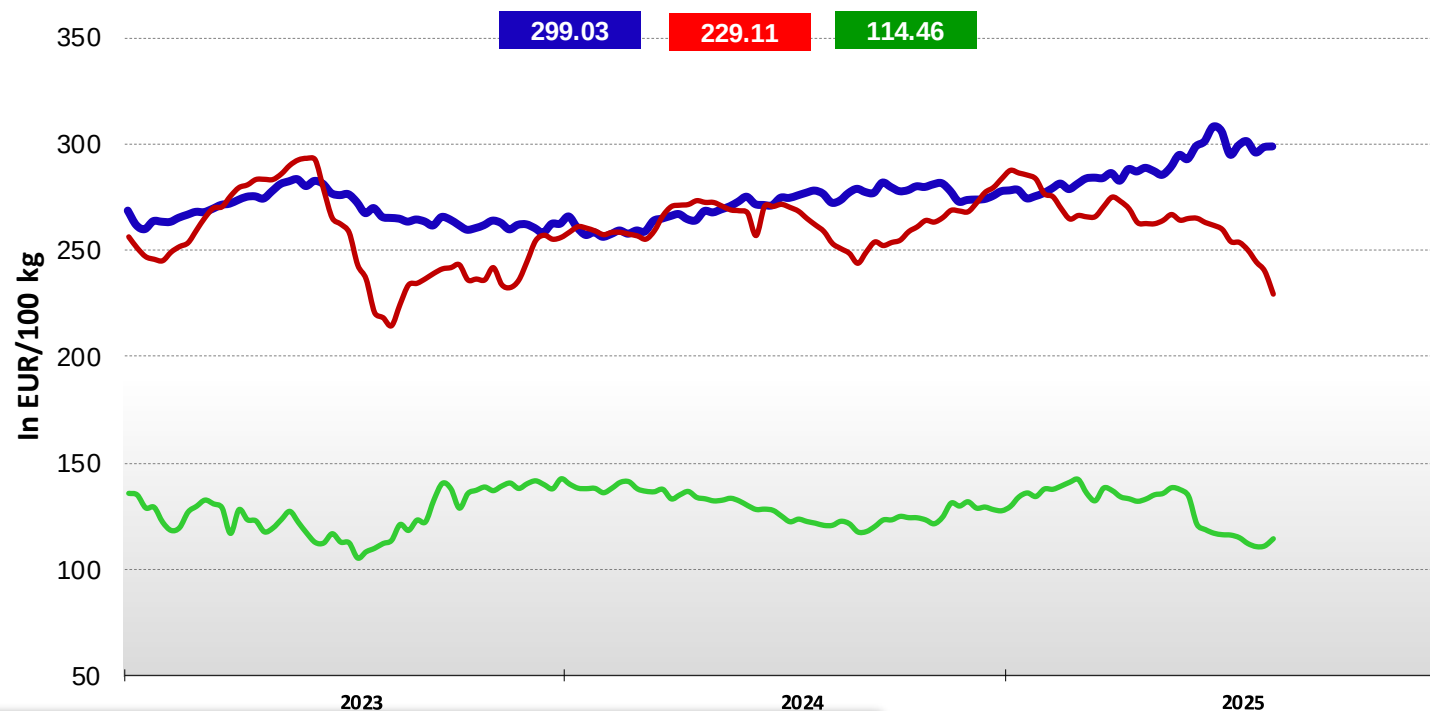
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
 ! Prices reported by MS are preliminary and may be subject to change !

COST BROILER PRODUCTION



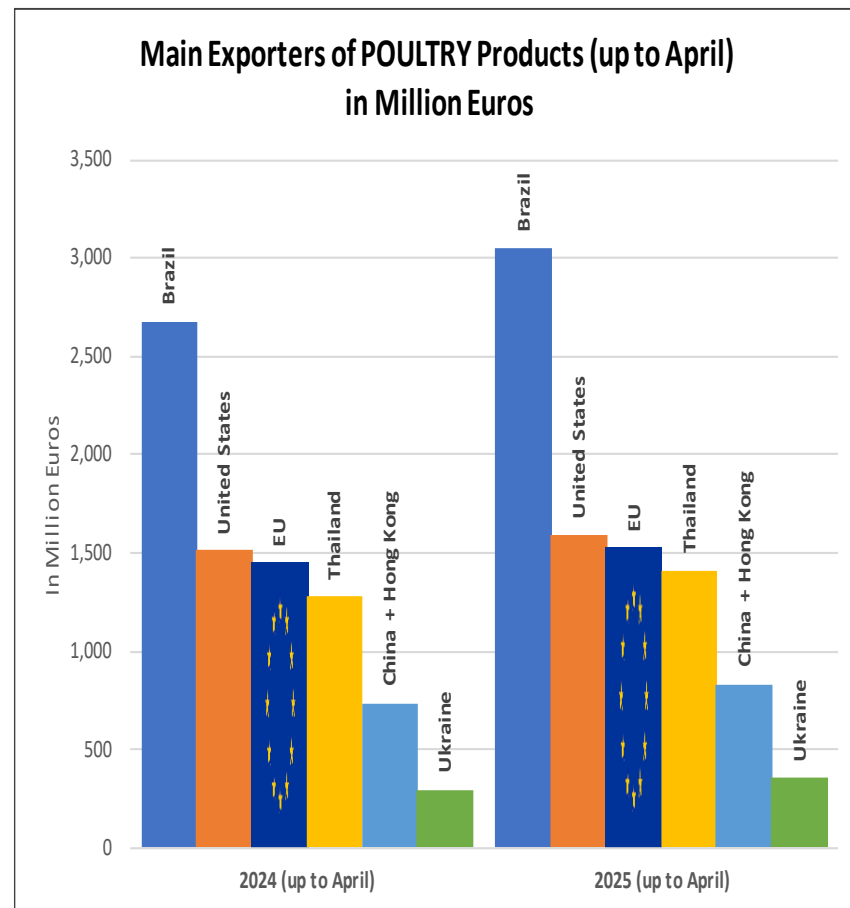
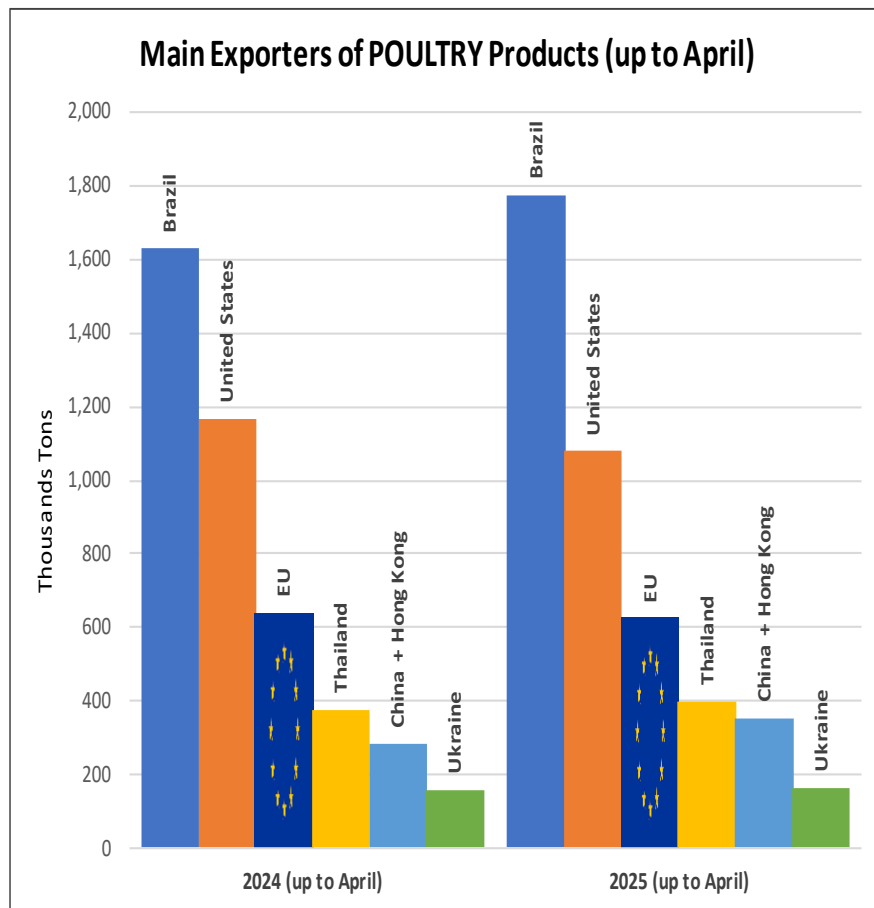
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

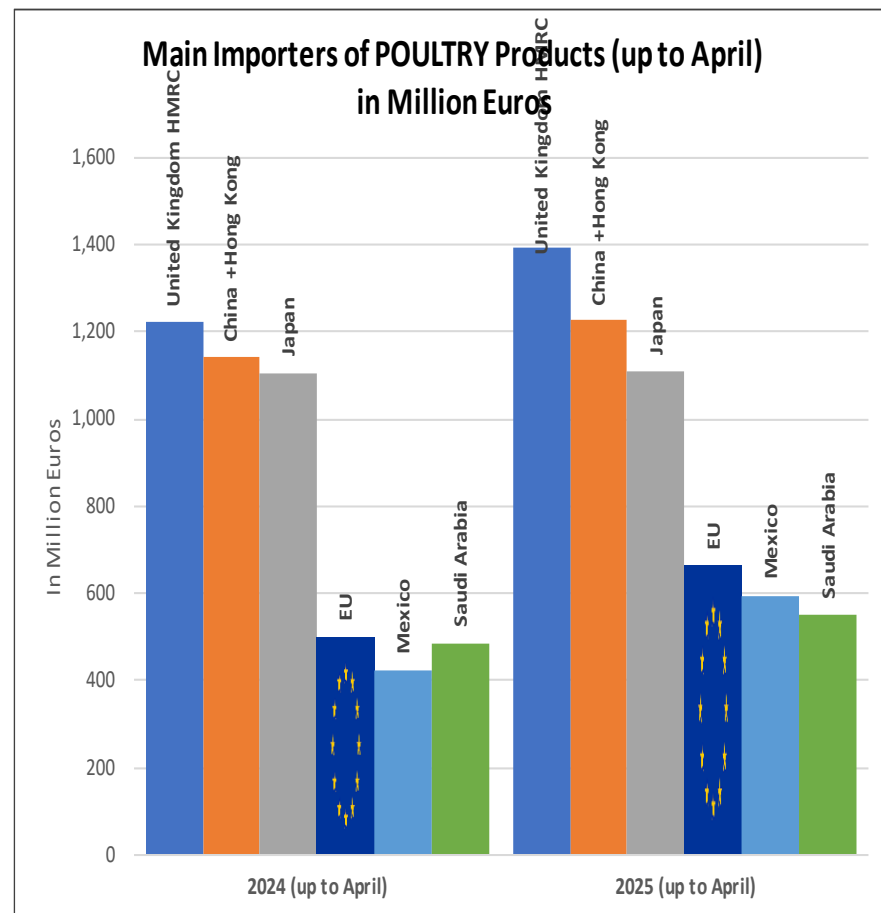
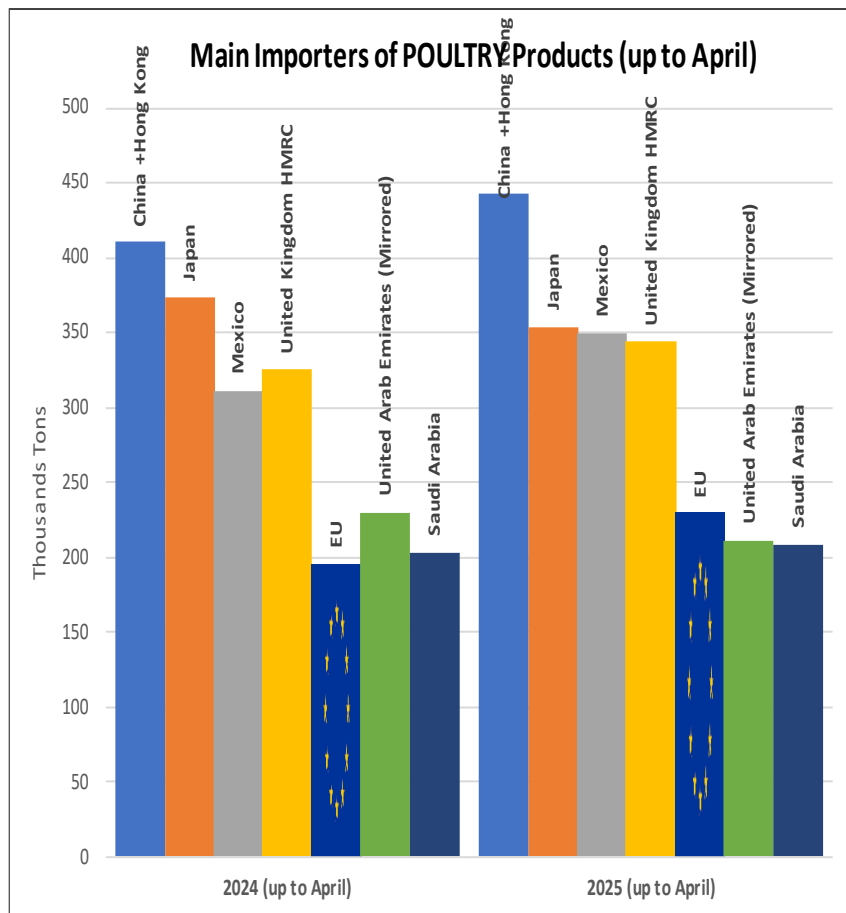
— EU — US — BR



Source: Trade Data Monitor

WORLD MARKET

MAIN IMPORTERS



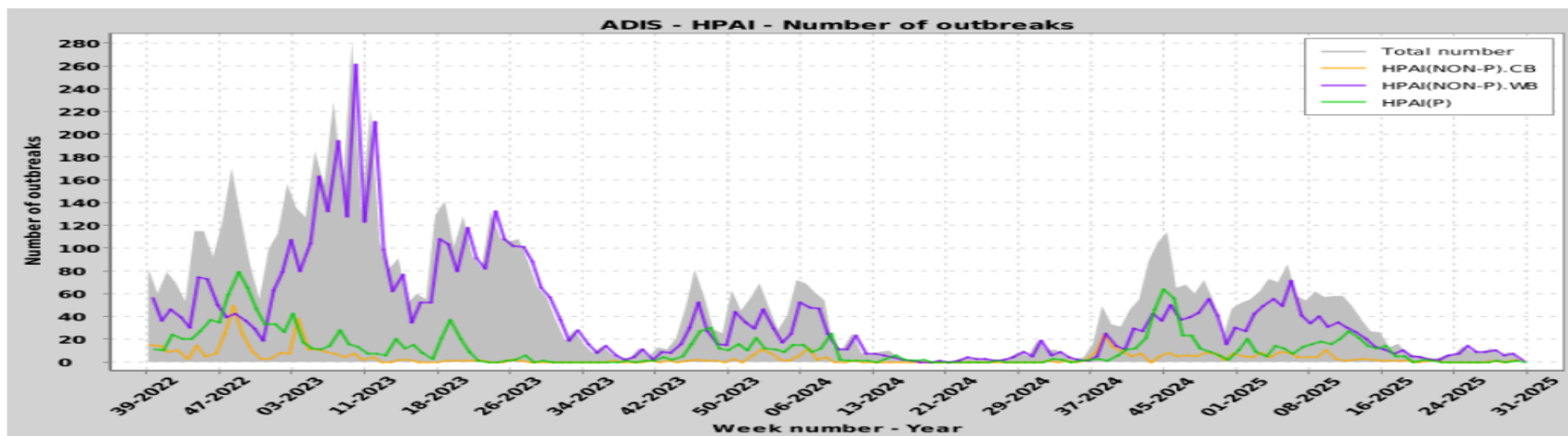
Source: Trade Data Monitor

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 07/08/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
PL	109	10.692.247	21%	50%
IT	56	4.255.764	11%	20%
HU	283	4.011.249	54%	19%
BG	10	558.107	2%	3%
SK	2	425.260	0%	2%
DE	22	294.308	4%	1%
LT	1	246.387	0%	1%
BE	3	244.136	1%	1%
NL	5	173.647	1%	1%
FR	9	162.372	2%	1%
AT	6	148.001	1%	1%
Other MS	16	208.373	0	0
Grand Total	522	21.419.851	100%	100%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	27	2.667.295	5%	12%
Laying hen	62	10.928.154	12%	51%
Duck	203	2.838.451	39%	13%
Turkey	90	3.003.241	17%	14%
Goose	76	400.502	15%	2%
Pheasant	3	6.569	1%	0%
Mixed	17	93.507	3%	0%
No information	44	1.482.132	8%	7%
Total	522	21.419.851	100%	100%



EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

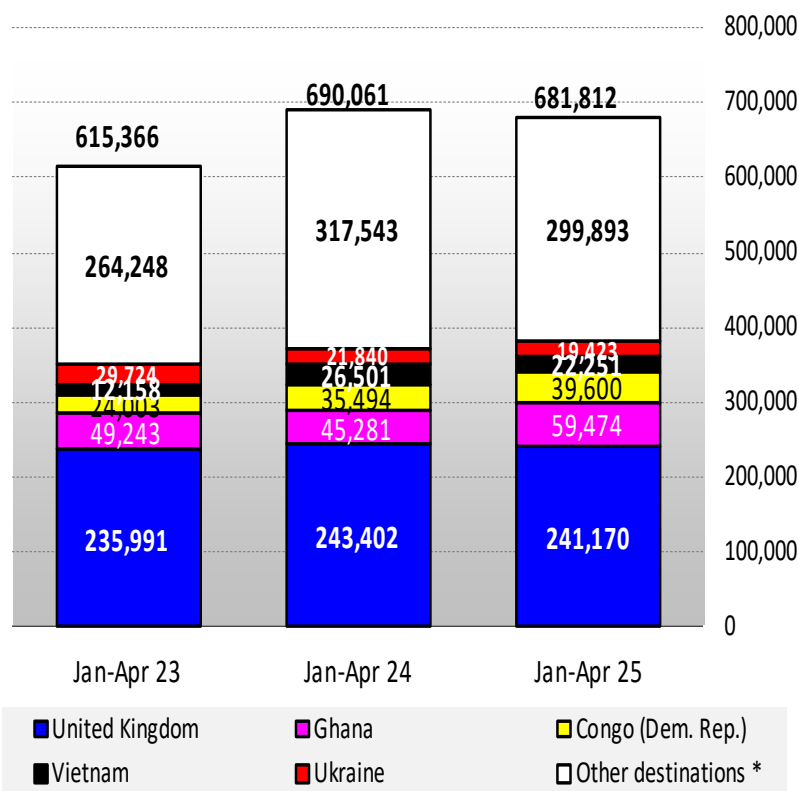
	2021		2022		2023		2024		Jan-Apr 25		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Apr 24
United Kingdom	725.611	32%	747.161	37%	721.833	37%	747.627	35%	241.170	35,4%	- 0,9%
Ghana	228.066	10%	156.456	8%	149.223	8%	154.492	7%	59.474	8,7%	+ 31,3%
Congo (Dem. Rep.)	139.852	6%	125.421	6%	101.020	5%	109.801	5%	39.600	5,8%	+ 11,6%
Vietnam	31.784	1%	29.751	1%	54.203	3%	69.023	3%	22.251	3,3%	- 16,0%
Ukraine	162.267	7%	105.810	5%	84.639	4%	58.716	3%	19.423	2,8%	- 11,1%
Saudi Arabia	58.457	3%	74.590	4%	66.759	3%	66.994	3%	19.236	2,8%	- 24,8%
Congo	30.303	1%	35.562	2%	46.737	2%	55.412	3%	17.474	2,6%	- 6,0%
Benin	64.358	3%	63.516	3%	61.286	3%	43.794	2%	16.825	2,5%	+ 78,0%
Switzerland	33.390	1%	33.784	2%	34.718	2%	41.356	2%	15.482	2,3%	+ 21,2%
Philippines	81.155	4%	6.421	0%	4.256	0%	55.883	3%	14.999	2,2%	- 9,8%
Other Destinations	697.130	31%	666.461	33%	637.812	33%	744.299	35%	215.877	31,7%	
Extra-EU	2.252.374		2.044.934		1.962.485		2.147.397		681.812		
% change			- 9%		- 4%		+ 9%		- 1,2%		

EU-27 Exports of poultry meat to selected destinations

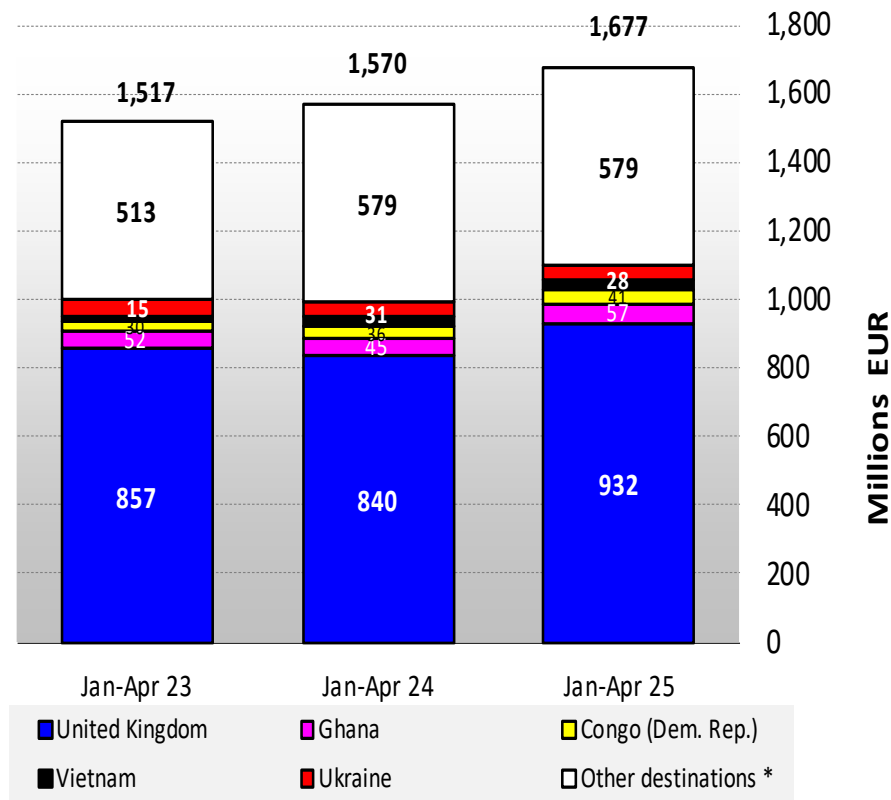
	2021		2022		2023		2024		Jan-Apr 25		Compared to Jan-Apr 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	2,009,674	51%	2,652,567	67%	2,593,946	65%	2,681,563	68%	932,126	23.5%	+ 11.0%
Ghana	224,103	6%	167,715	4%	156,970	4%	153,988	4%	57,367	1.4%	+ 26.7%
Congo (Dem. Rep.)	116,553	3%	145,766	4%	112,110	3%	112,142	3%	40,733	1.0%	+ 12.1%
Vietnam	35,592	1%	39,533	1%	67,601	2%	86,150	2%	27,749	0.7%	- 11.5%
Ukraine	119,533	3%	102,729	3%	125,678	3%	106,385	3%	39,927	1.0%	+ 5.1%
Saudi Arabia	93,283	2%	159,672	4%	128,754	3%	138,371	3%	34,206	0.9%	- 35.7%
Congo	26,636	1%	36,276	1%	42,776	1%	47,477	1%	13,807	0.3%	- 14.2%
Benin	87,264	2%	106,959	3%	103,984	3%	60,680	2%	30,400	0.8%	+ 142.4%
Switzerland	179,202	5%	210,024	5%	221,569	6%	244,320	6%	88,543	2.2%	+ 19.2%
Philippines	57,220	1%	7,793	0%	6,571	0%	34,778	1%	7,920	0.2%	- 15.2%
Other Destinations	1,023,295	26%	1,107,293	28%	1,186,219	30%	1,289,856	32%	404,522	10.2%	
Extra-EU	3,972,355		4,736,325		4,746,178		4,955,709		1,677,300		
% change			+ 19%		+ 0%		+ 4%		+ 6.8%		

EU-27 poultry meat exports (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)

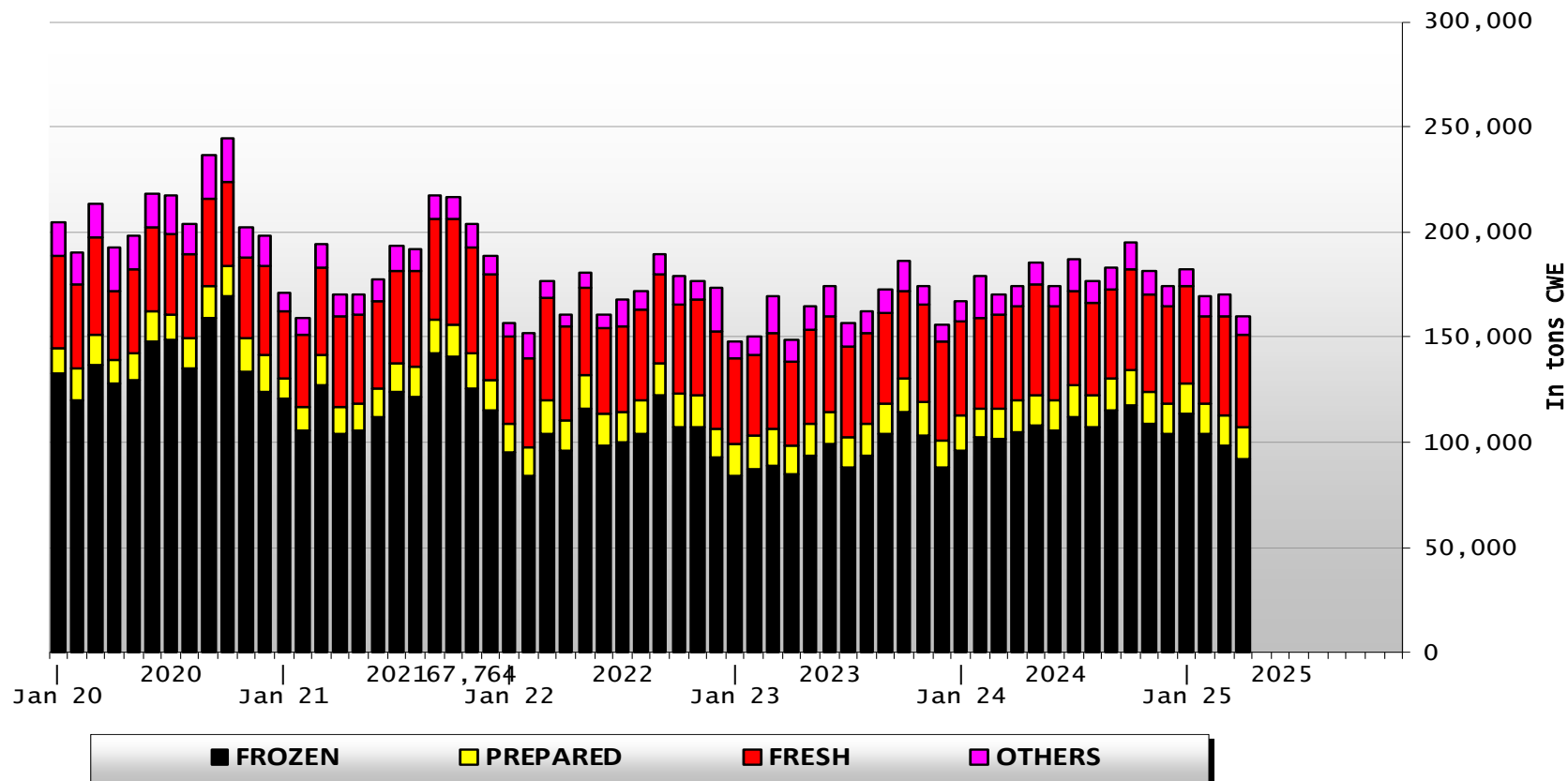


EU EXPORTS of Poultry Meat (Millions EUR)



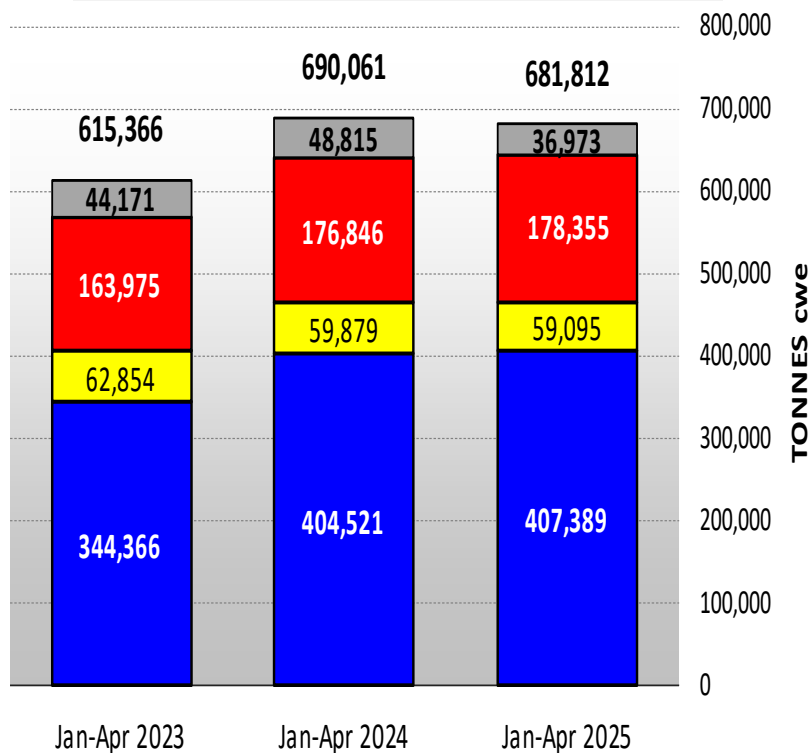
* countries trading less than 34 (Millions EUR)

Exports of selected Poultry products



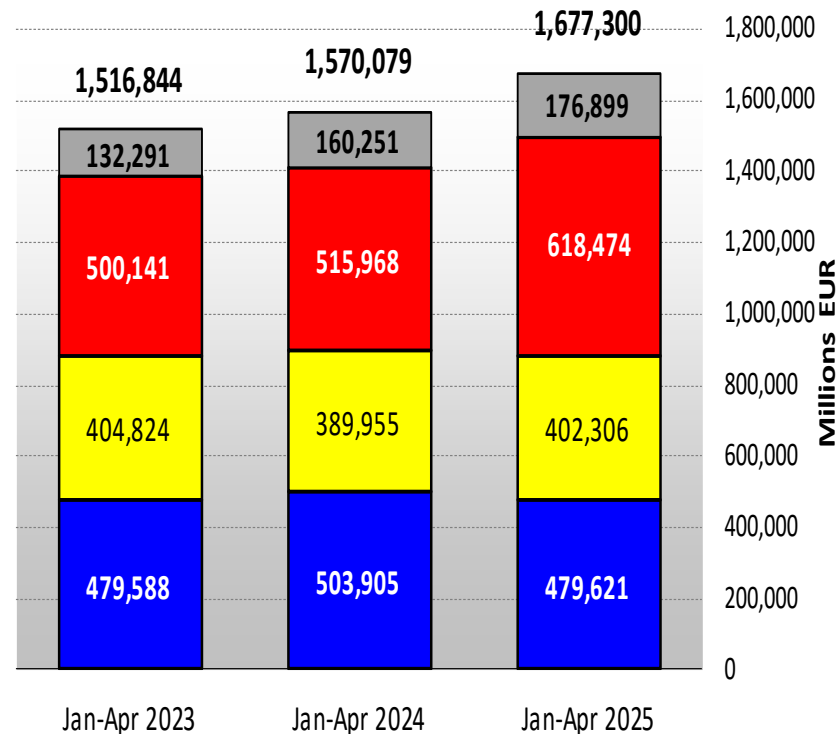
EU-27 poultry meat exports (by meat type)

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

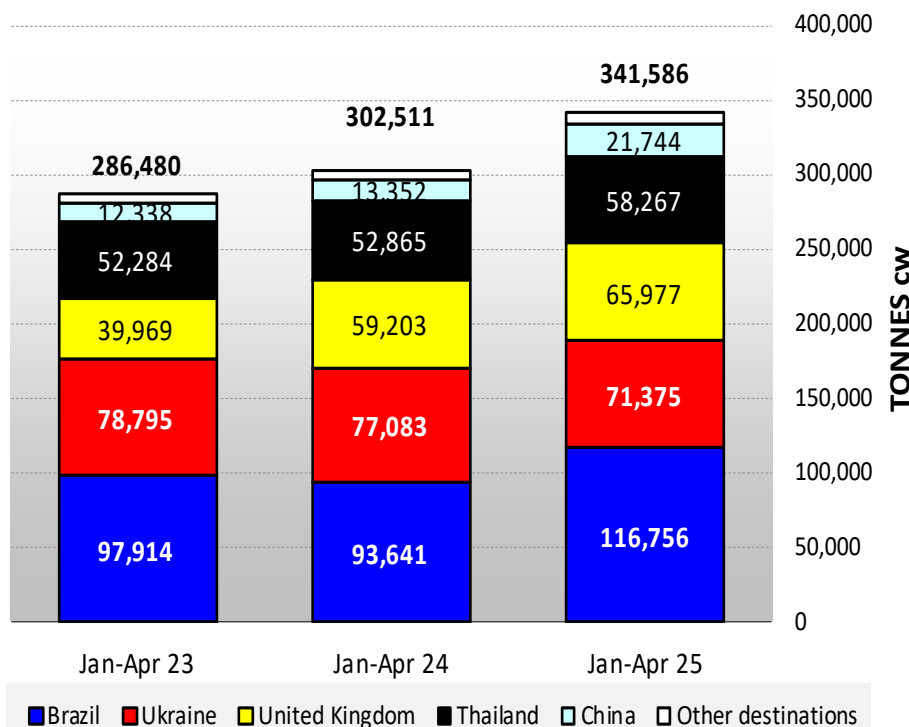
	2021		2022		2023		2024		Jan-Apr 25		Compared to Jan-Apr 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	251,887	32%	299,536	35%	288,723	32%	286,600	32%	116,756	34.2%	+ 24.7%
Ukraine	102,892	13%	160,697	19%	231,906	26%	194,484	22%	71,375	20.9%	- 7.4%
United Kingdom	274,667	34%	210,738	25%	171,949	19%	196,796	22%	65,977	19.3%	+ 11.4%
Thailand	130,658	16%	131,954	15%	148,698	17%	157,580	17%	58,267	17.1%	+ 10.2%
China	20,916	3%	32,864	4%	36,561	4%	45,181	5%	21,744	6.4%	+ 62.9%
Argentina	3,151	0%	4,096	0%	4,079	0%	6,711	1%	3,591	1.1%	+++
Norway	2,508	0%	2,094	0%	2,126	0%	3,240	0%	1,000	0.3%	+ 22.7%
Other Destinations	10,378	1%	9,447	1%	11,266	1%	11,794	1%	2,876	0.8%	
Extra-EU	797,056		851,427		895,307		902,386		341,586		
% change			+ 7%		+ 5%		+ 1%		+ 12.9%		

EU-27 Imports of poultry meat from selected origins

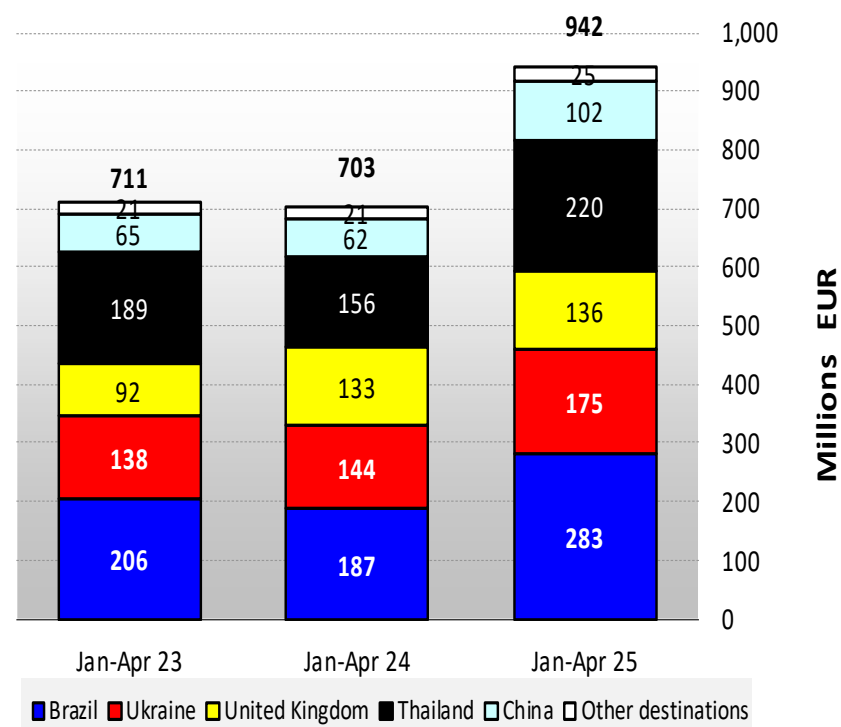
	2021		2022		2023		2024		Jan-Apr 25		Compared to Jan-Apr 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	388,472	29%	669,772	31%	598,220	28%	624,041	28%	283,386	30.1%	+ 51.5%
Ukraine	166,208	12%	324,836	15%	418,449	20%	400,671	18%	175,139	18.6%	+ 21.9%
United Kingdom	327,273	24%	369,160	17%	354,848	17%	400,341	18%	135,668	14.4%	+ 2.1%
Thailand	317,487	24%	519,175	24%	490,197	23%	491,373	22%	220,405	23.4%	+ 41.3%
China	95,081	7%	186,175	9%	183,071	9%	207,943	9%	102,003	10.8%	+ 64.0%
Argentina	6,508	0%	11,463	1%	11,360	1%	16,070	1%	7,770	0.8%	+++
Norway	7,914	1%	8,286	0%	8,888	0%	10,537	0%	4,777	0.5%	+ 51.6%
Switzerland	5,300	0%	8,975	0%	6,730	0%	6,205	0%	2,484	0.3%	+ 24.8%
Moldova			13	0%			344	0%	1,280	0.1%	+++
Bosnia-Herz.	10,345	1%	10,728	1%	9,362	0%	17,175	1%	3,052	0.3%	- 7.3%
<i>Other Destinations</i>	21,485	2%	20,473	1%	27,445	1%	20,601	1%	6,120	0.6%	
Extra-EU	1,346,074		2,129,057		2,108,570		2,195,301		942,084		
% change			+ 58%		- 1%		+ 4%		+ 34.1%		

EU27 poultry meat imports (by origin)

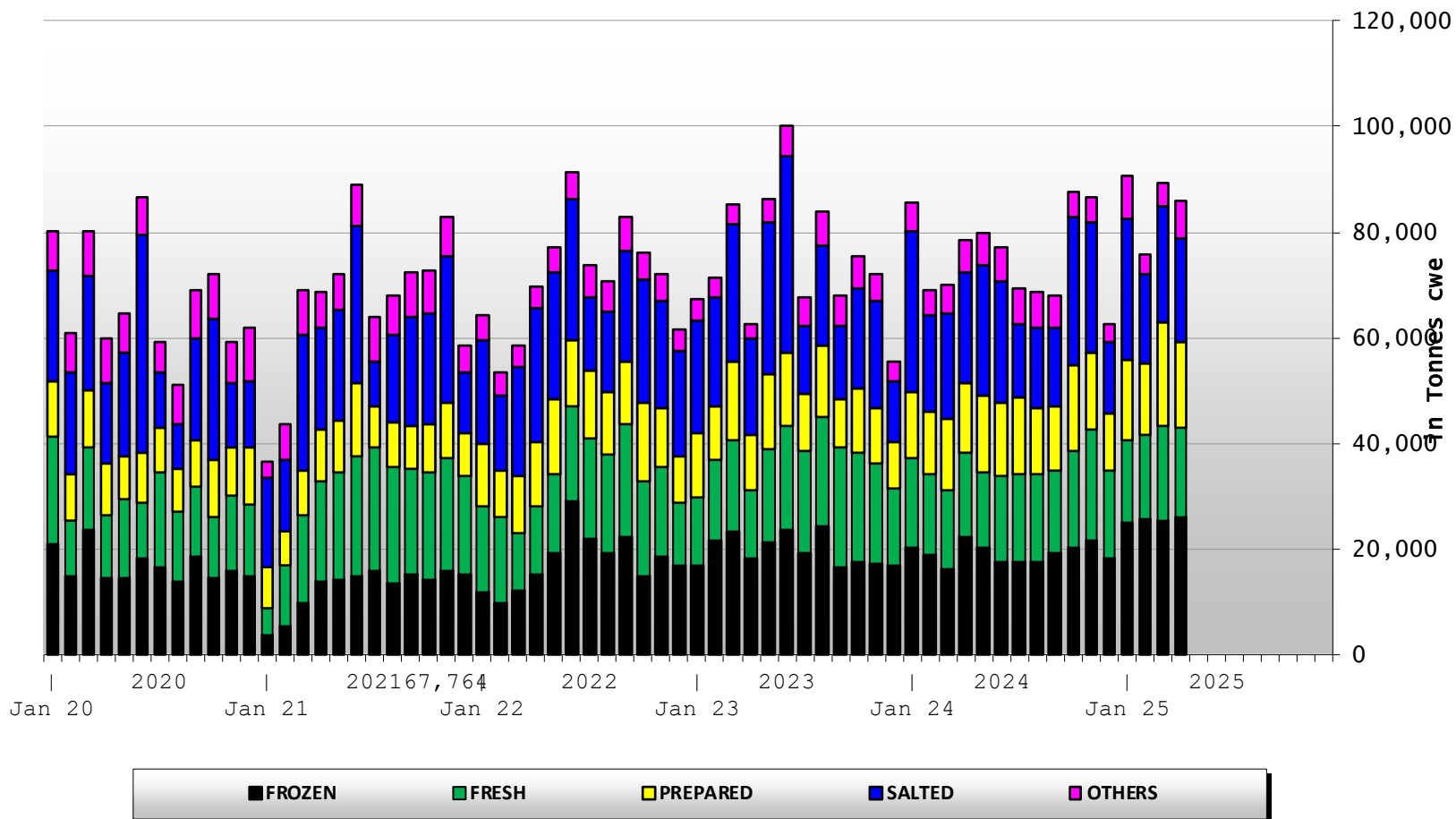
EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)

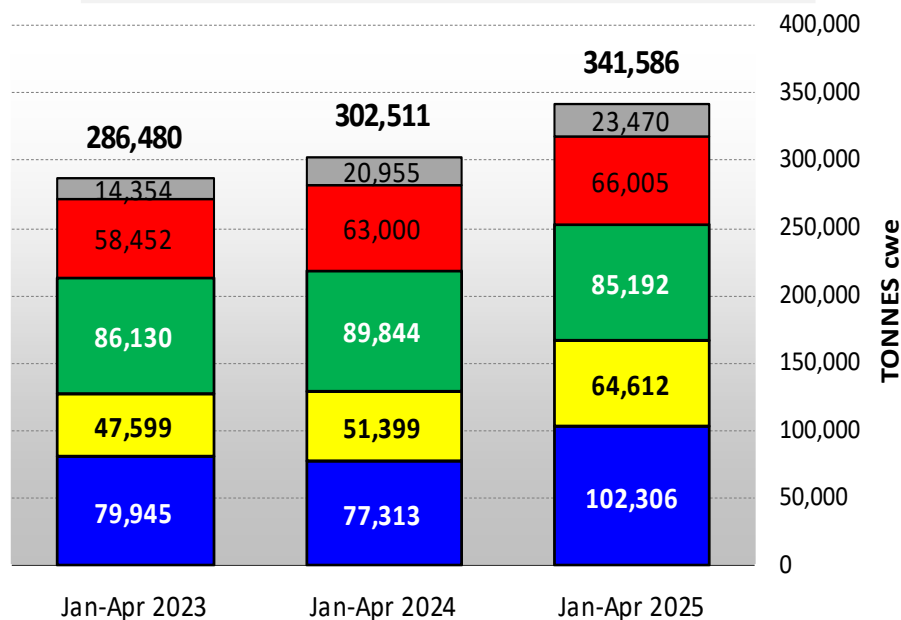


Imports of selected Poultry products



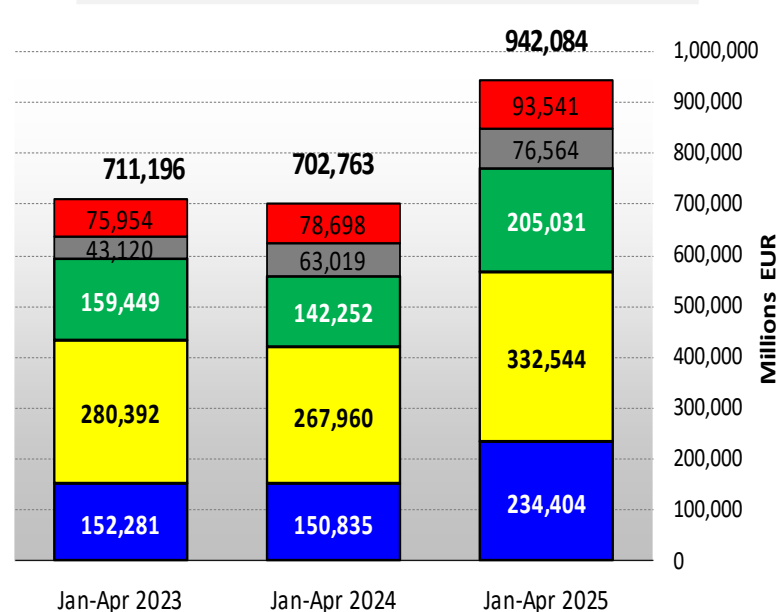
EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)



■ FROZEN ■ PREPARED ■ SALTED ■ FRESH ■ OTHERS

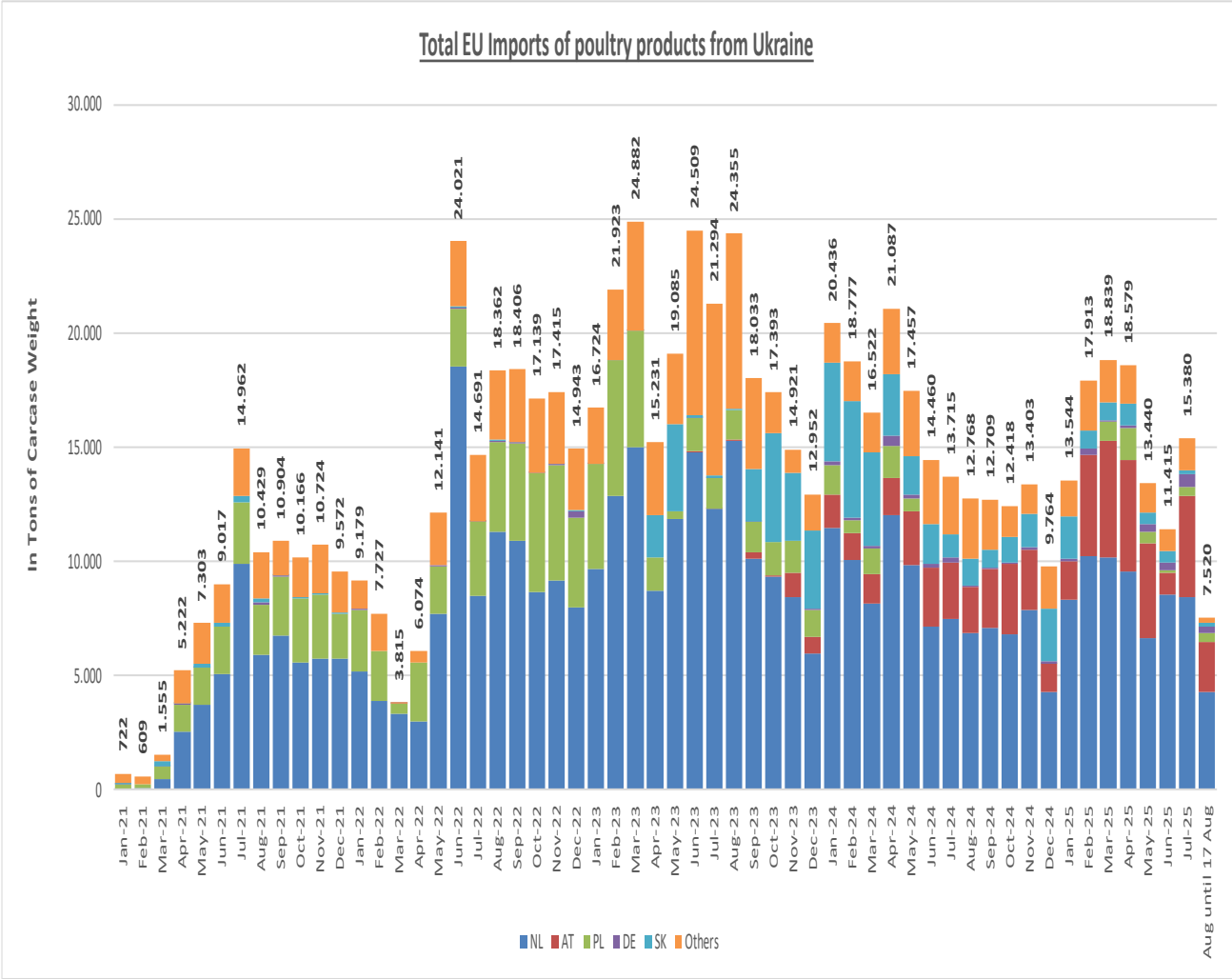
EU IMPORTS of Poultry Meat (Millions EUR)



■ FROZEN ■ PREPARED ■ SALTED ■ OTHERS ■ FRESH

TRADE

EU IMPORTS



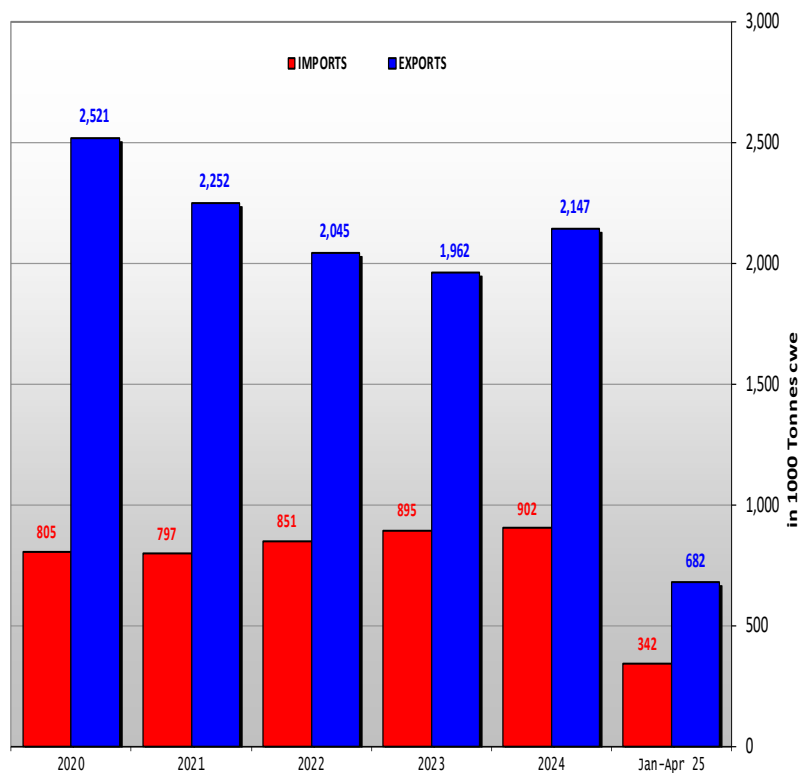
	2022	2023	2024	2025 (until 17 Aug)
Poultry EU total	187.968	231.302	183.516	116.629
NL	98.192	134.453	99.124	66.261
AT	0	2.186	24.530	27.839
SK	131	19.456	27.610	5.802
PL	38.127	26.862	4.943	3.648
LT	3.455	4.282	4.439	2.236
EL	112	769	3.103	2.017
DE	717	158	1.779	1.989
ES	0	1.895	2.140	1.482
IT	257	1.245	1.097	1.430
BG	23	67	1.470	1.073
CZ	527	971	3.357	988
CY	98	140	1.094	832
RO	1.627	3.947	7.655	356
EE	1	88	320	274
PT	0	0	49	228
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



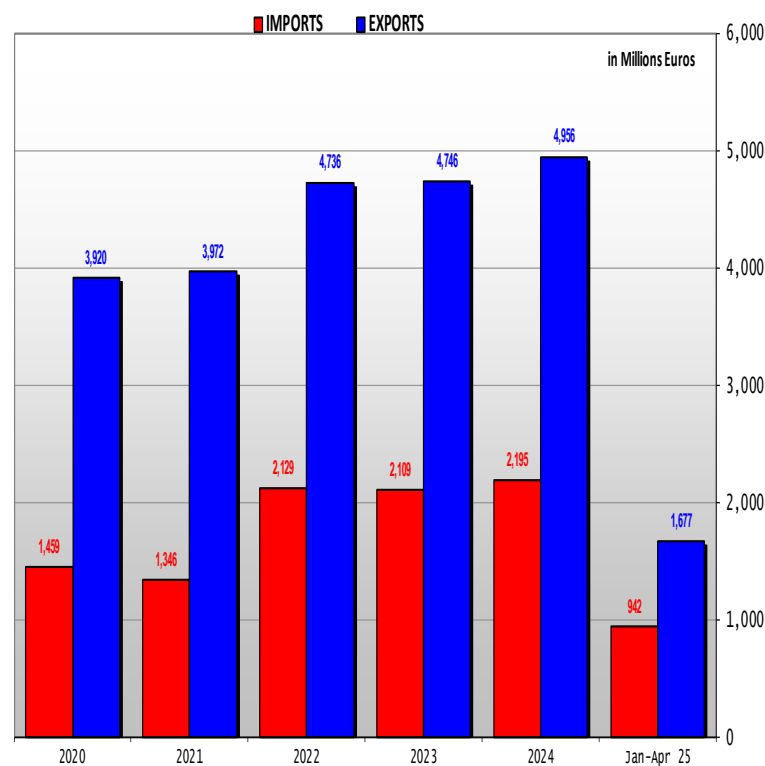
TRADE

BALANCE

in 1000 tons cwe



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



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