

# EU Market Situation for Poultry



**Expert Group for Agricultural Markets**

**18 April 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
<b>EU27</b>	<b>14,107,974</b>	<b>14,397,224</b>	<b>14,550,507</b>	<b>2.1</b>	<b>1.1</b>

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# 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
<b>EU27</b>	<b>11,915,056</b>	<b>12,121,471</b>	<b>12,239,500</b>	<b>1.7</b>	<b>1.0</b>

### 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					
<b>EU27</b>	<b>1,766,437</b>	<b>1,803,533</b>	<b>1,804,657</b>	<b>2.1</b>	<b>0.1</b>

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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					
<b>EU27</b>	<b>363,665</b>	<b>402,255</b>	<b>435,415</b>	<b>10.6</b>	<b>8.2</b>

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					
<b>EU27</b>	<b>122,742</b>	<b>115,422</b>	<b>110,982</b>	<b>-6.0</b>	<b>-3.8</b>

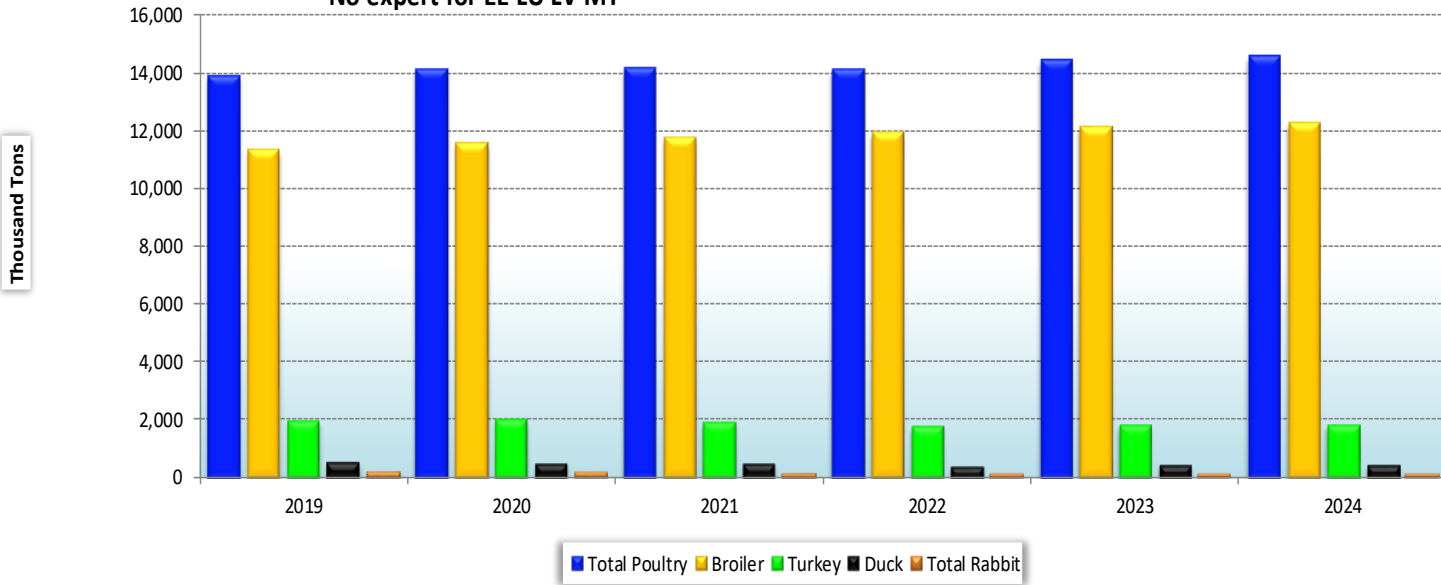
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# FORECAST

## 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

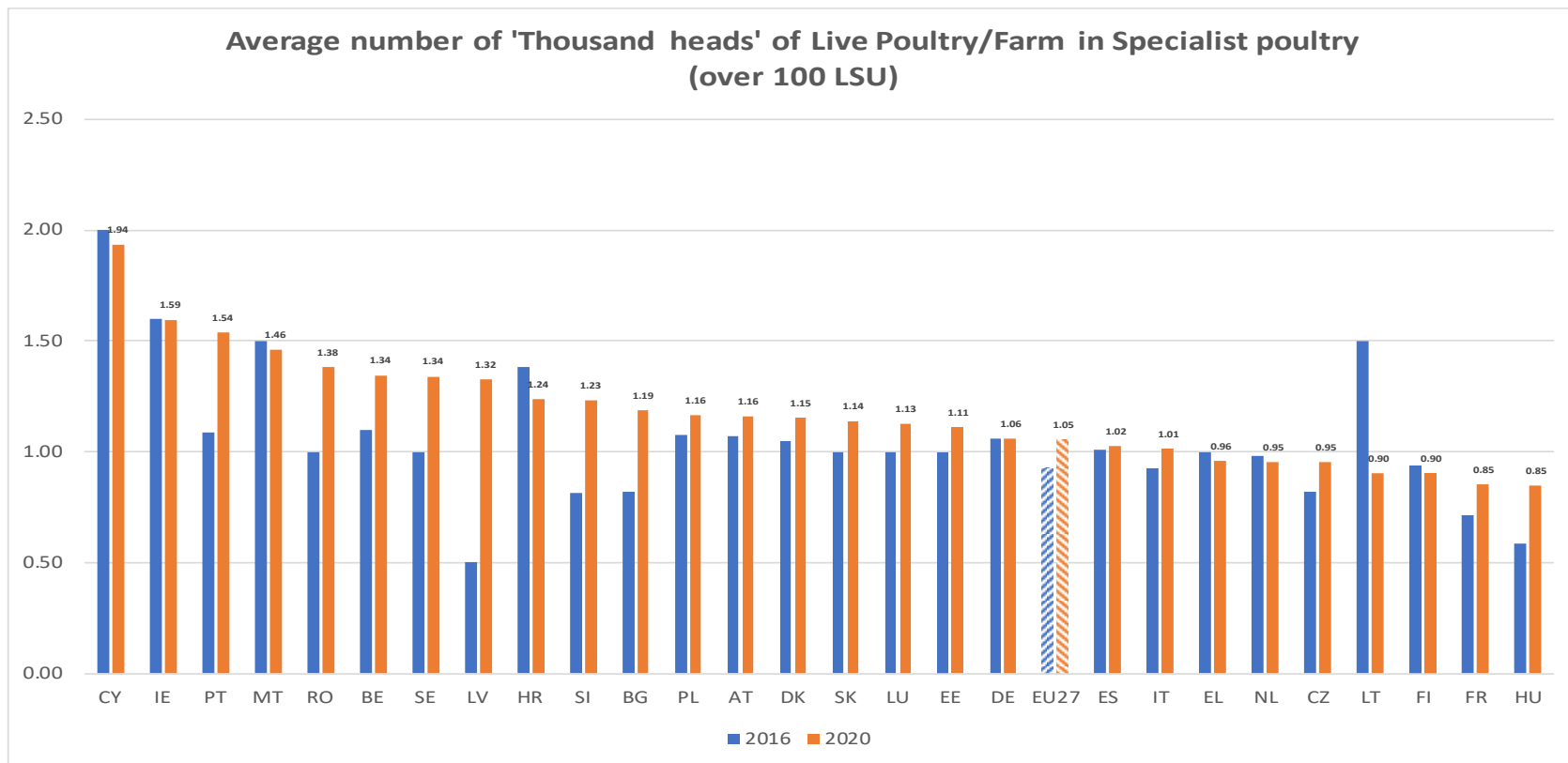


	2019	2020	2021	2022	2023	2024	% 2023/2022	% 2024/2023
<b>Total Poultry</b>	13,860	14,072	14,125	14,108	14,397	14,551	+ 2.1%	+ 1.1%
Broiler	11,289	11,544	11,732	11,915	12,121	12,240	+ 1.7%	+ 1.0%
Turkey	1,946	2,013	1,888	1,766	1,804	1,805	+ 2.1%	+ 0.1%
Duck	518	452	458	364	402	435	+ 10.6%	+ 8.2%
<b>Total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

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# FARM STRUCTURE SURVEY

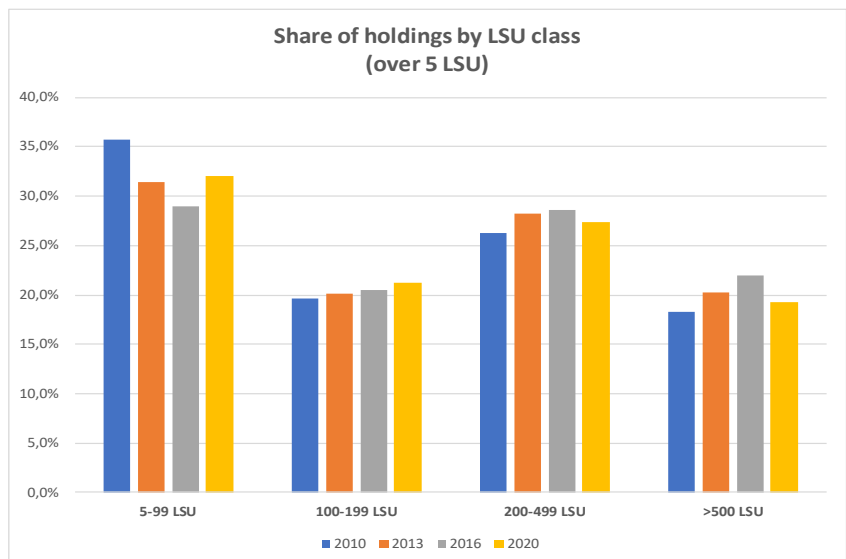
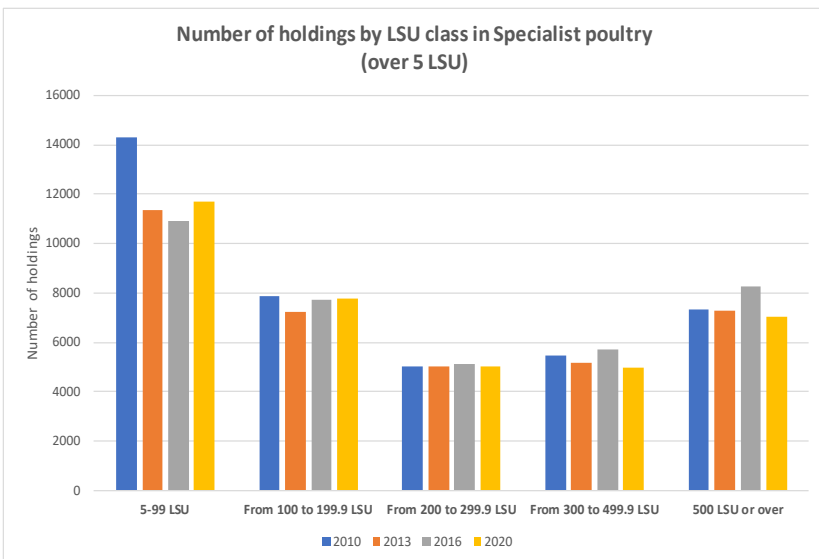
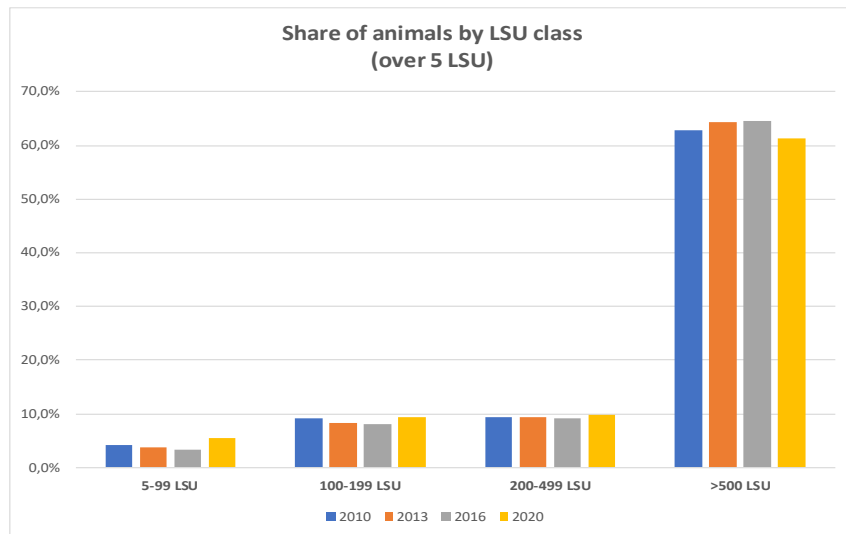
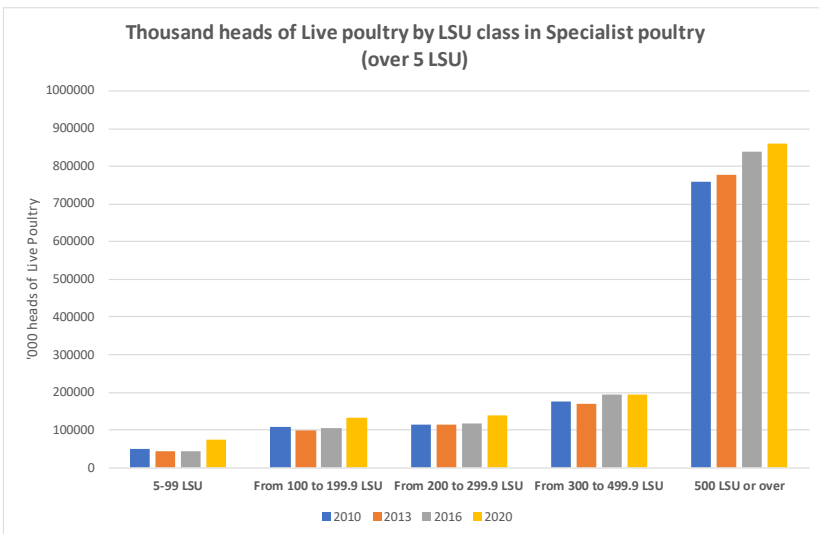
**LSU for poultry:**  
 broiler- 0,007  
 laying hen- 0,014  
 turkey- 0,03  
 duck- 0,01  
 geese- 0,02



## Specialist poultry - EU

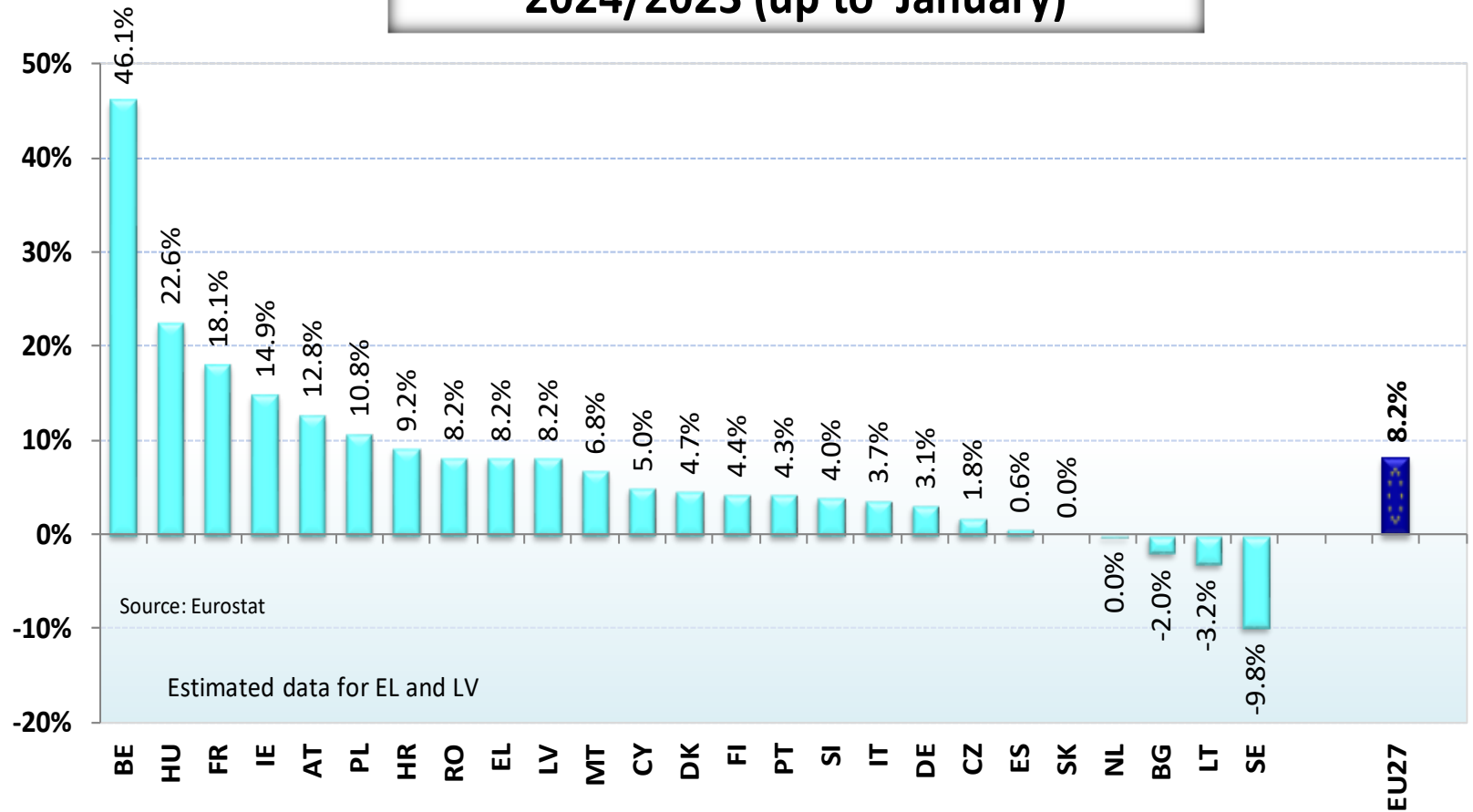
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

# FARM STRUCTURE SURVEY



# PRODUCTION

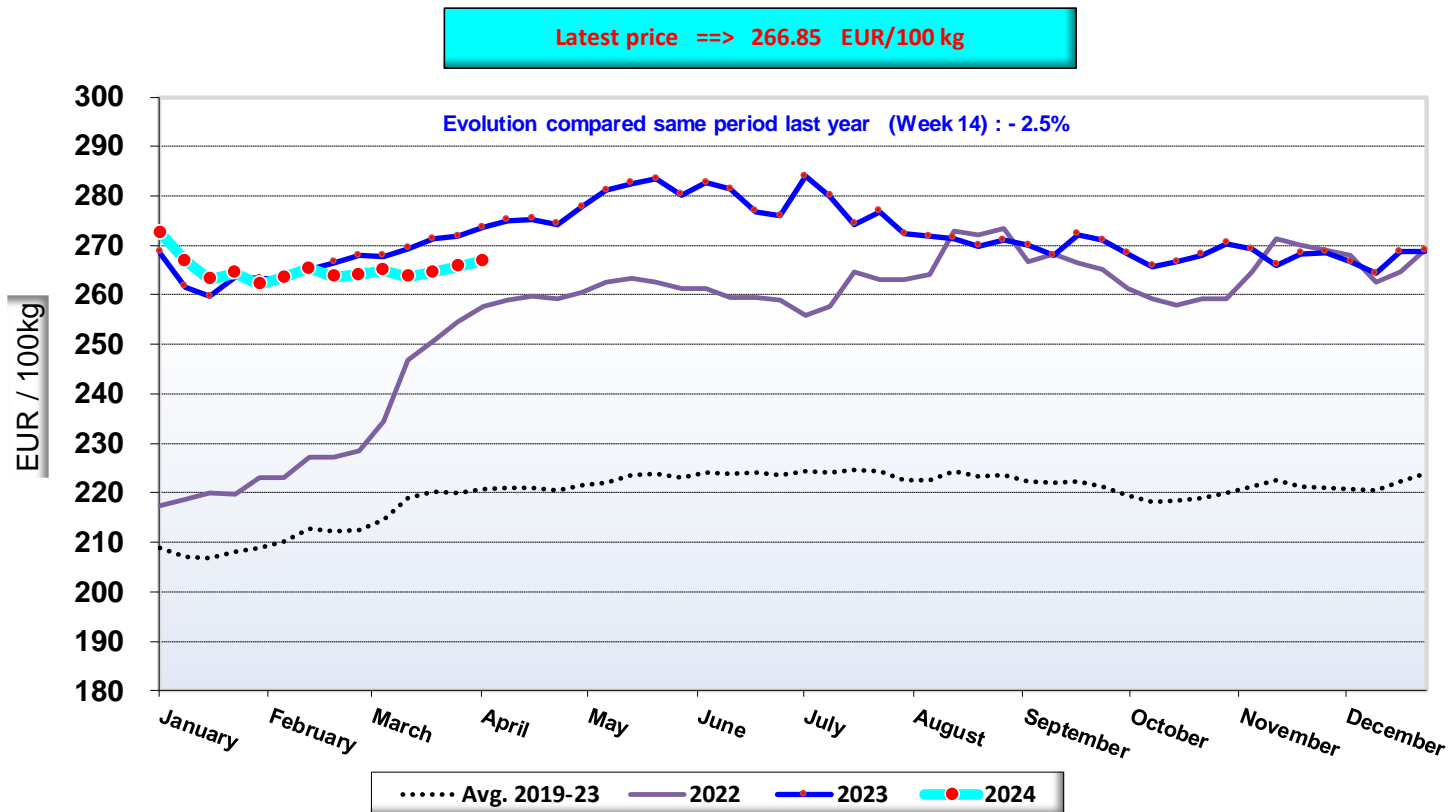
Change in Poultry Meat Production in %  
2024/2023 (up to January)



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

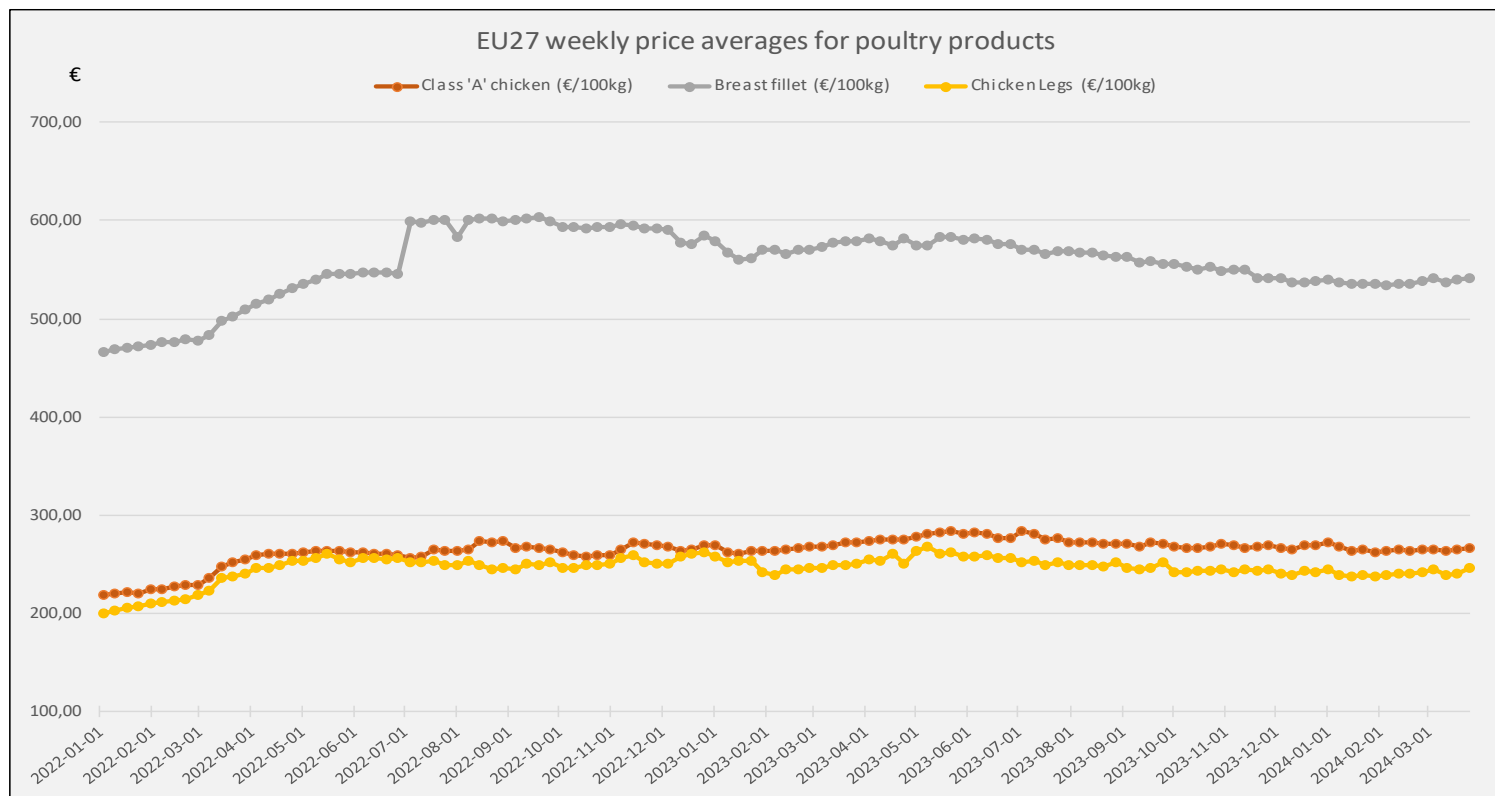


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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## Weekly prices of poultry products

Week - 13 EU27 weekly price averages for poultry products

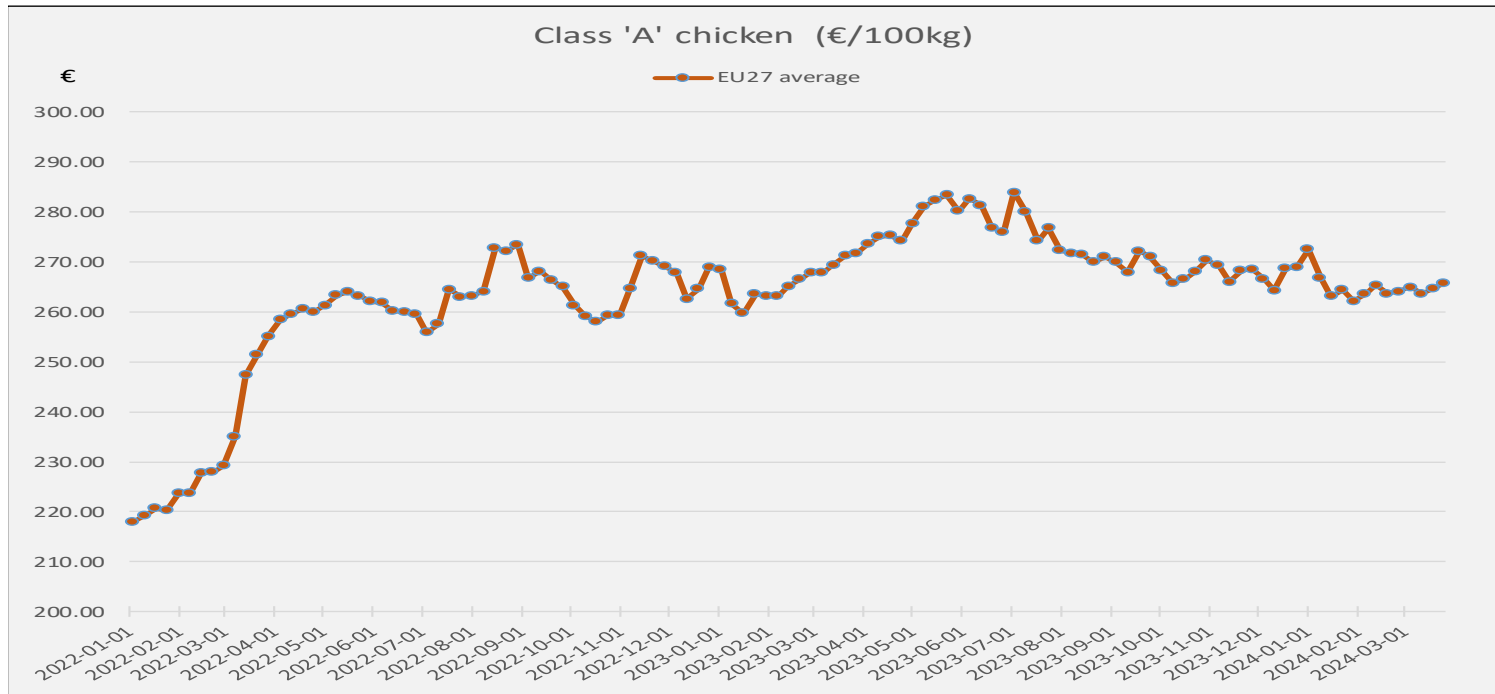


Week - 13	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	265,76	541,41	246,17

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 - 13      Class 'A' chicken**



Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	265.76	+ 0.4%	+ 0.6%	- 2.2%

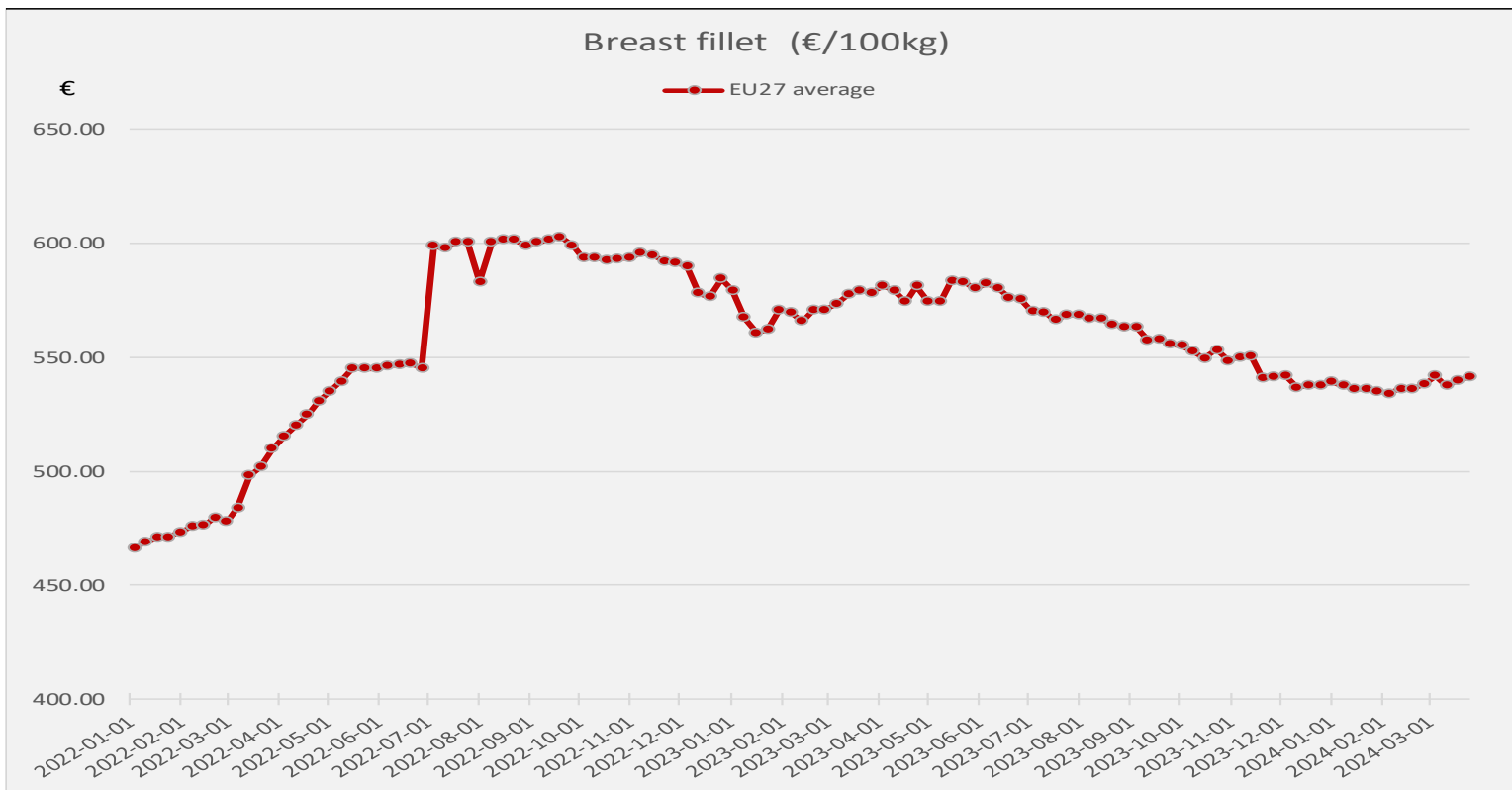
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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## Weekly price of 'Breast fillet'

Week - 13 Breast fillet



Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	541.41	+ 0.3%	+ 0.6%	- 6.4%

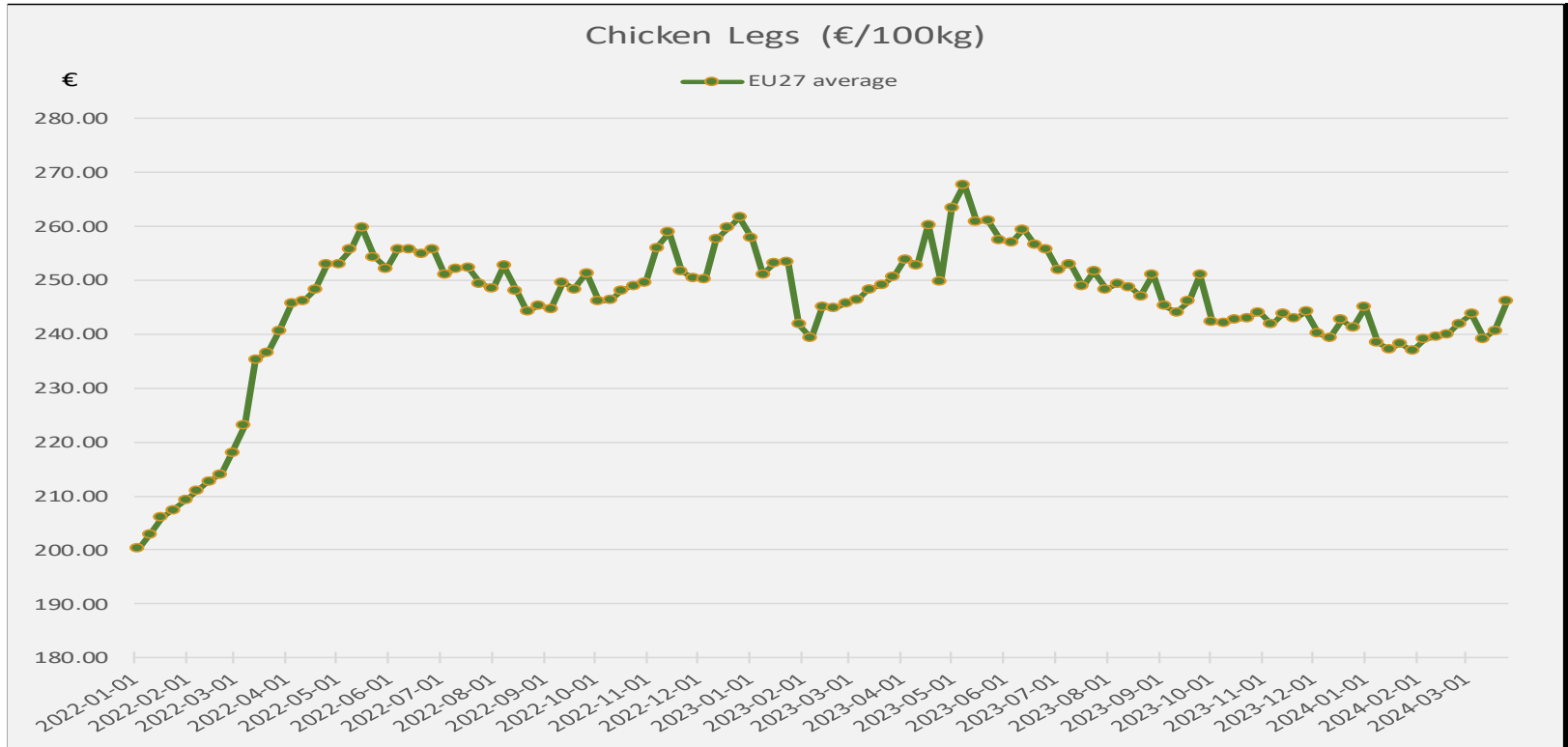
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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## Weekly price of 'Chicken legs'

Week - 13      Chicken Legs

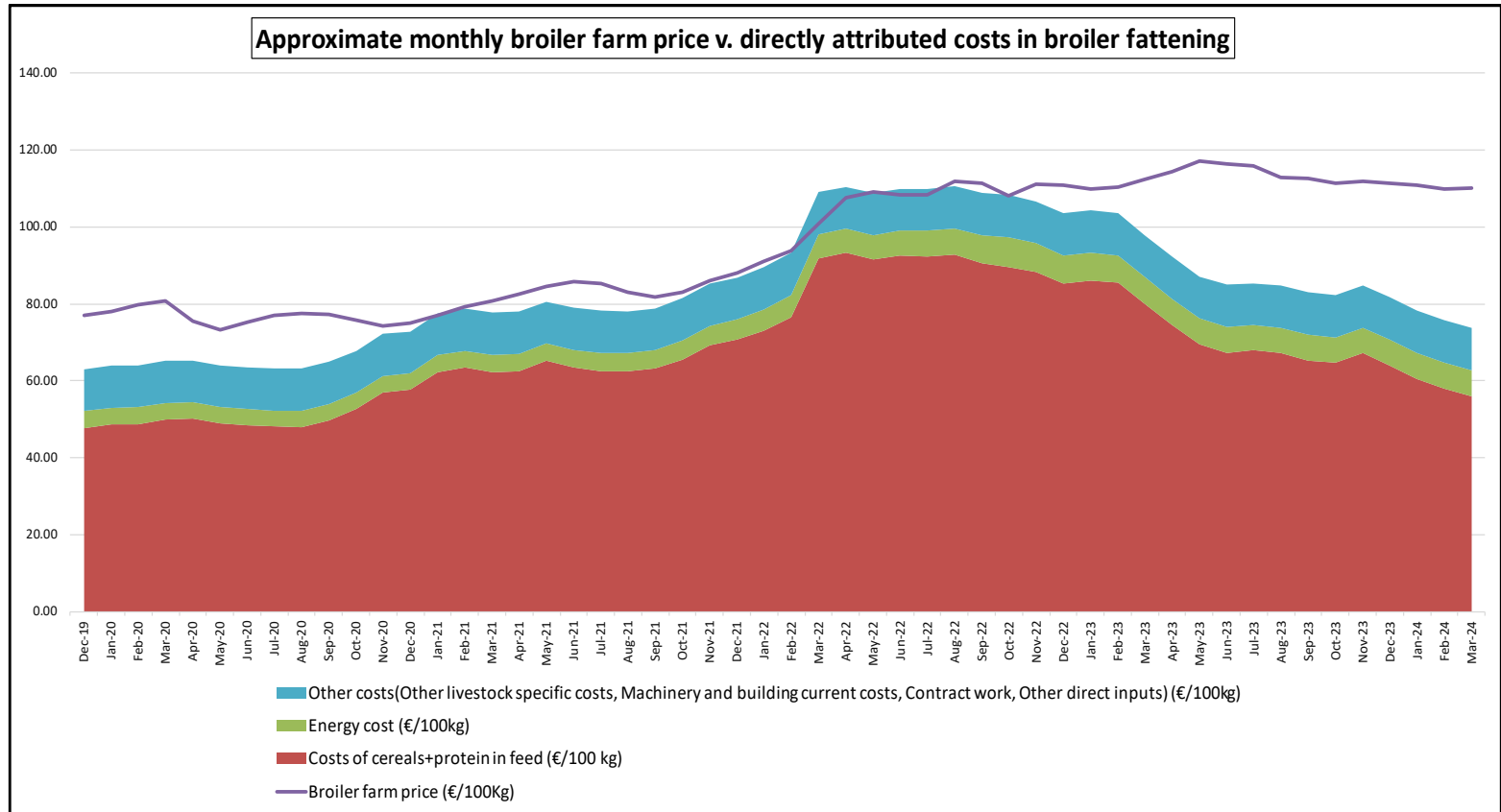


Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	246.17	+ 2.3%	+ 1.8%	- 1.8%

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

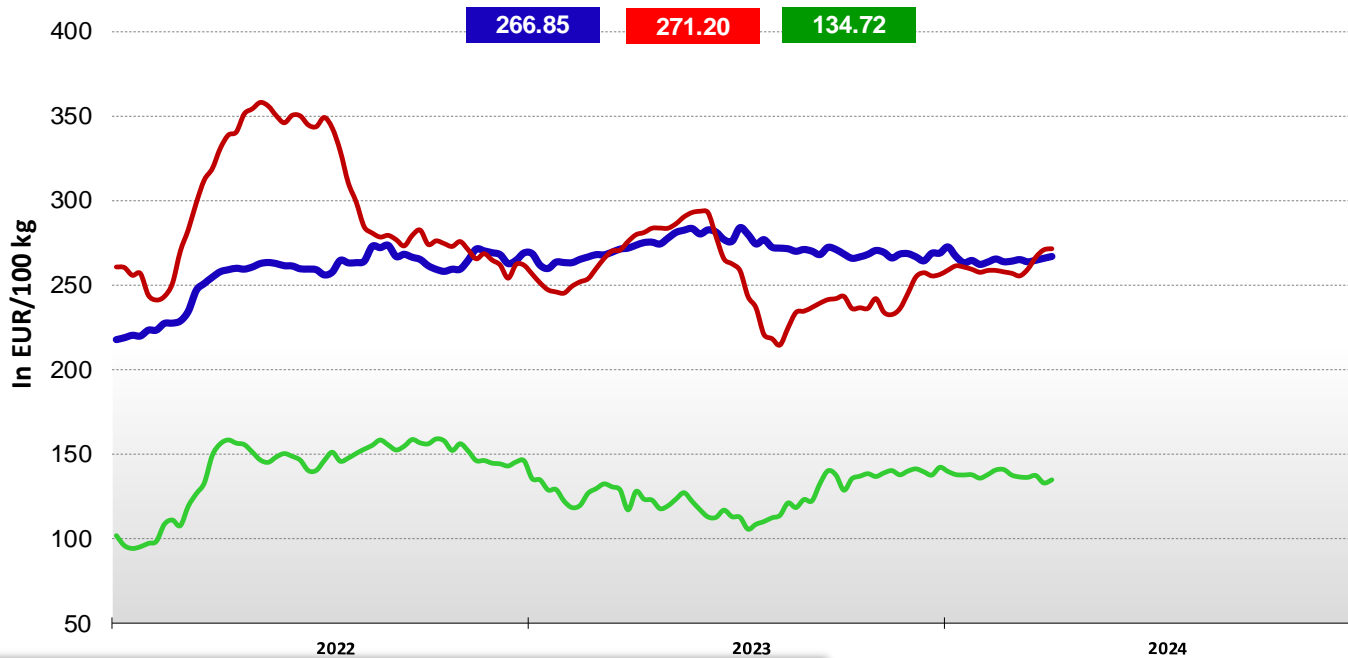


Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

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

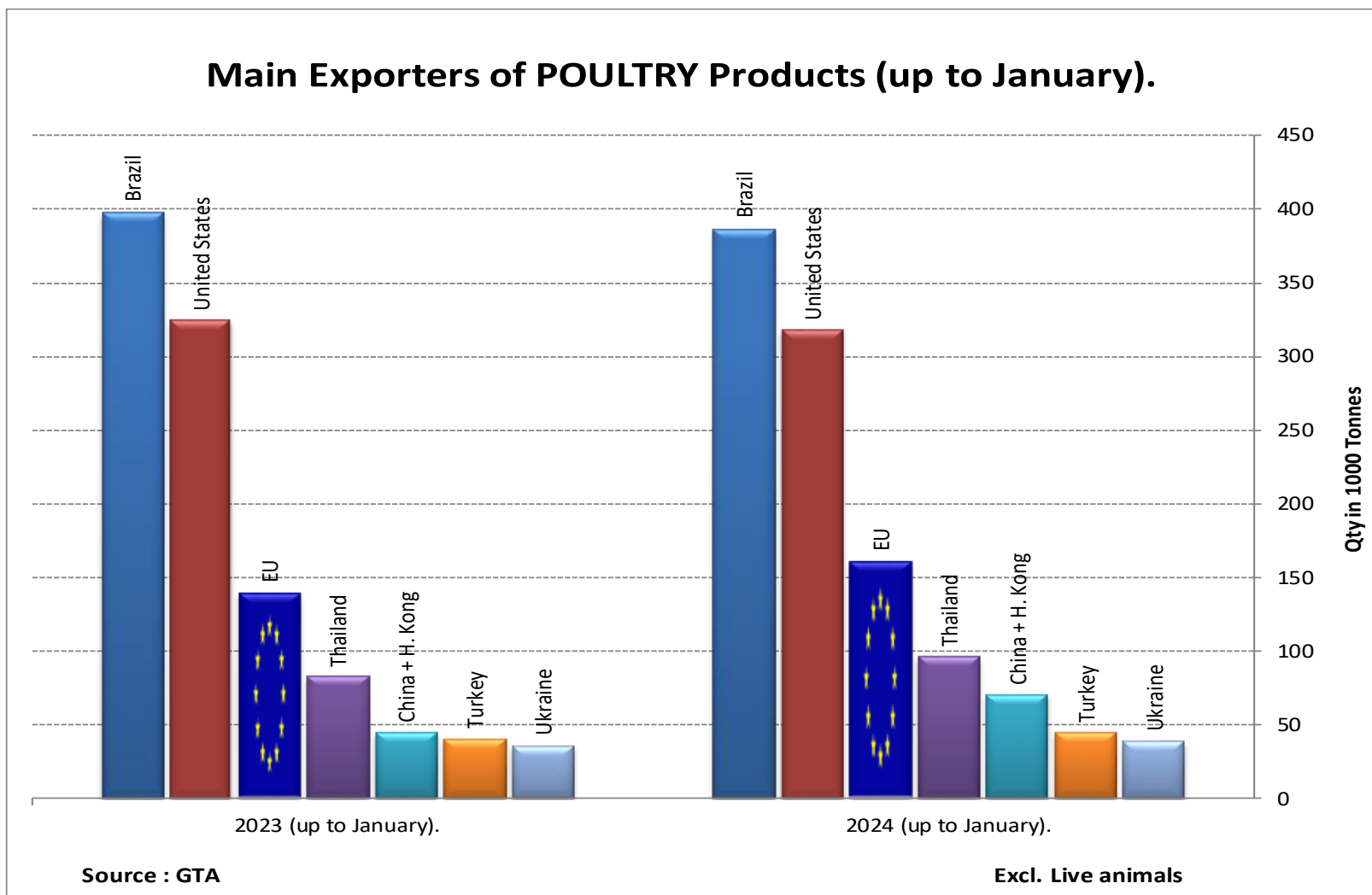
## Broiler prices in EU, USA and Brazil



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

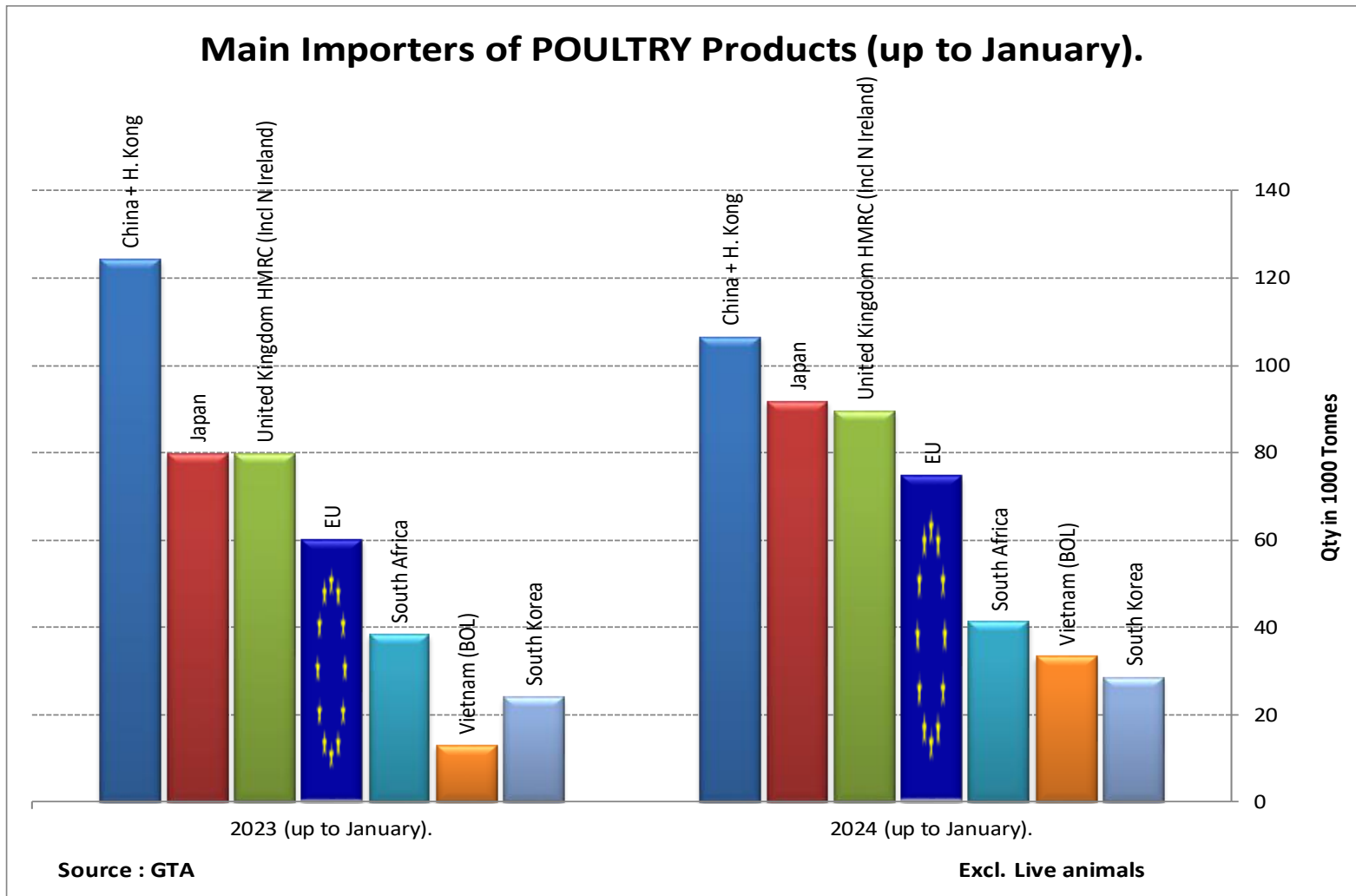
**Main Exporters of POULTRY Products (up to January).**



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### Main Importers of POULTRY Products (up to January).



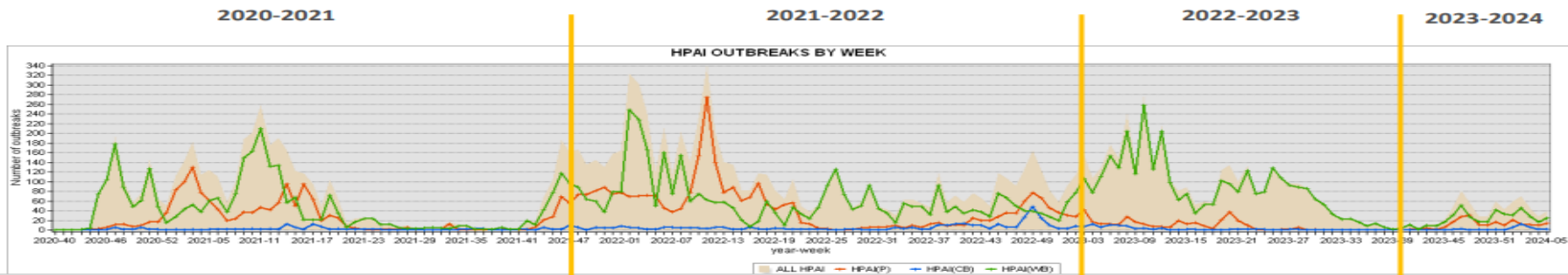
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# Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 10/04/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
HU	76	1.603.222	36%	25%
BG	16	1.527.951	8%	24%
PL	34	868.764	16%	14%
DE	29	561.365	14%	9%
FR	9	402.162	4%	6%
SK	7	295.369	3%	5%
DK	13	264.437	6%	4%
CZ	5	208.805	2%	3%
IT	6	187.647	3%	3%
Others	17	476.937	8%	7%
<b>Grand Total</b>	<b>212</b>	<b>6.396.659</b>	<b>100,0%</b>	<b>100,0%</b>

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	13	668.299	6%	10%
Laying hen	25	1.201.026	12%	19%
Duck	43	1.045.511	20%	16%
Turkey	68	1.573.712	32%	25%
Goose	22	124.447	10%	2%
Guinea fowl	1	17.256	0%	0%
Pheasant	2	9.785	1%	0%
Mixed	9	35.115	4%	1%
No information	29	1.721.508	14%	27%
<b>Grand Total</b>	<b>212</b>	<b>6.396.659</b>	<b>100%</b>	<b>100%</b>



[https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza\\_en](https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en)



## EU-27 Exports of poultry meat to selected destinations

*In tons of carcass weight equivalent*

	2020		2021		2022		2023		Jan 24		Compared to Jan 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811.675	32%	725.611	32%	732.508	36%	730.017	37%	68.206	39,8%	+ 16,6%
Ghana	213.838	8%	228.066	10%	156.456	8%	148.963	8%	10.121	5,9%	- 7,3%
Congo (Dem. Rep.)	101.987	4%	139.852	6%	125.421	6%	101.073	5%	9.703	5,7%	+ 29,0%
Ukraine	145.871	6%	162.267	7%	105.810	5%	84.687	4%	6.928	4,0%	- 28,5%
Vietnam	50.977	2%	31.784	1%	29.751	1%	54.239	3%	5.792	3,4%	+++
Saudi Arabia	74.407	3%	58.457	3%	74.590	4%	66.760	3%	5.341	3,1%	- 13,9%
Benin	61.472	2%	64.358	3%	63.516	3%	61.308	3%	3.964	2,3%	- 28,3%
Angola	19.372	1%	22.739	1%	41.682	2%	23.078	1%	3.587	2,1%	+++
Switzerland	30.592	1%	33.390	1%	33.784	2%	34.906	2%	3.094	1,8%	+ 13,4%
Gabon	38.164	2%	39.818	2%	33.946	2%	28.093	1%	2.996	1,7%	+ 8,0%
<i>Other Destinations</i>	<i>972.396</i>	<i>39%</i>	<i>746.030</i>	<i>33%</i>	<i>632.771</i>	<i>31%</i>	<i>638.883</i>	<i>32%</i>	<i>51.764</i>	<i>30,2%</i>	
<b>Extra-EU</b>	<b>2.520.753</b>		<b>2.252.374</b>		<b>2.030.235</b>		<b>1.972.007</b>		<b>171.496</b>		
% change			- 11%		- 10%		- 3%		+ 16,7%		

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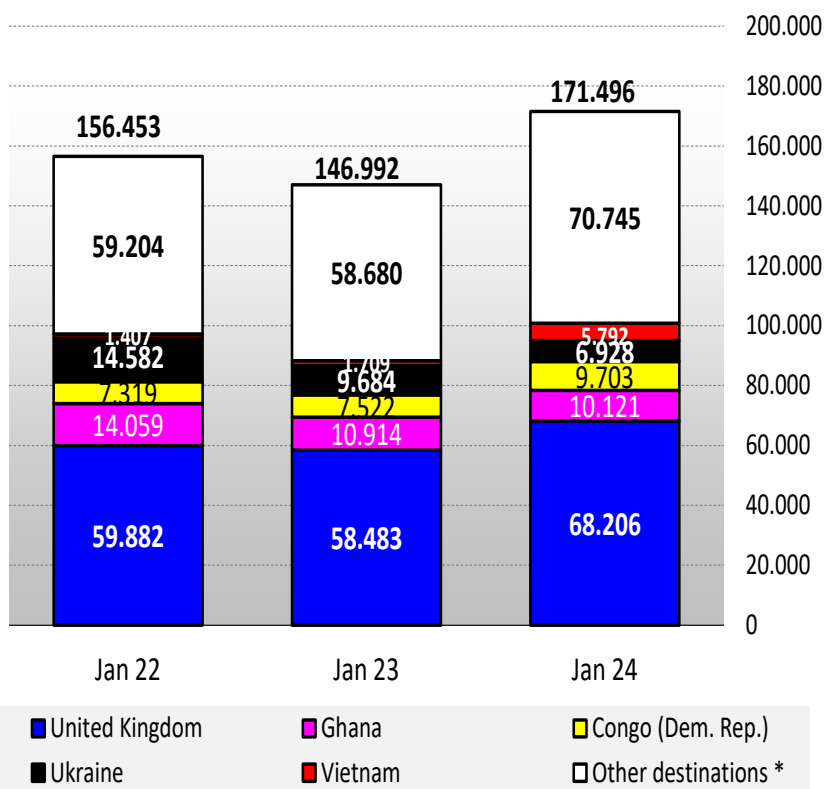
## EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan 24		Compared to Jan 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%	2.587.988	66%	222.122	5,7%	+ 4,9%
Ghana	172.363	4%	224.103	6%	167.715	4%	156.627	4%	9.857	0,3%	- 15,6%
Congo (Dem. Rep.)	81.033	2%	116.553	3%	145.766	4%	112.072	3%	9.542	0,2%	- 1,8%
Ukraine	100.109	3%	119.533	3%	102.729	3%	125.726	3%	8.796	0,2%	- 36,3%
Vietnam	55.251	1%	35.592	1%	39.533	1%	67.660	2%	7.081	0,2%	+++
Saudi Arabia	104.518	3%	93.283	2%	159.672	4%	128.774	3%	11.244	0,3%	+ 2,7%
Benin	64.292	2%	87.264	2%	106.959	3%	103.993	3%	5.473	0,1%	- 37,9%
Angola	13.594	0%	18.639	0%	39.349	1%	22.427	1%	2.680	0,1%	+ 90,3%
Switzerland	162.550	4%	179.202	5%	210.024	5%	221.548	6%	18.586	0,5%	+ 3,2%
Gabon	34.678	1%	38.934	1%	39.464	1%	32.985	1%	3.472	0,1%	+ 8,1%
<i>Other Destinations</i>	<i>1.149.741</i>	<i>29%</i>	<i>1.049.578</i>	<i>27%</i>	<i>1.072.534</i>	<i>27%</i>	<i>1.180.561</i>	<i>30%</i>	<i>91.389</i>	<i>2,3%</i>	
<b>Extra-EU</b>	<b>3.920.057</b>		<b>3.972.355</b>		<b>4.736.138</b>		<b>4.740.361</b>		<b>390.244</b>		
% change			+ 1%		+ 19%		+ 0%		+ 5,3%		

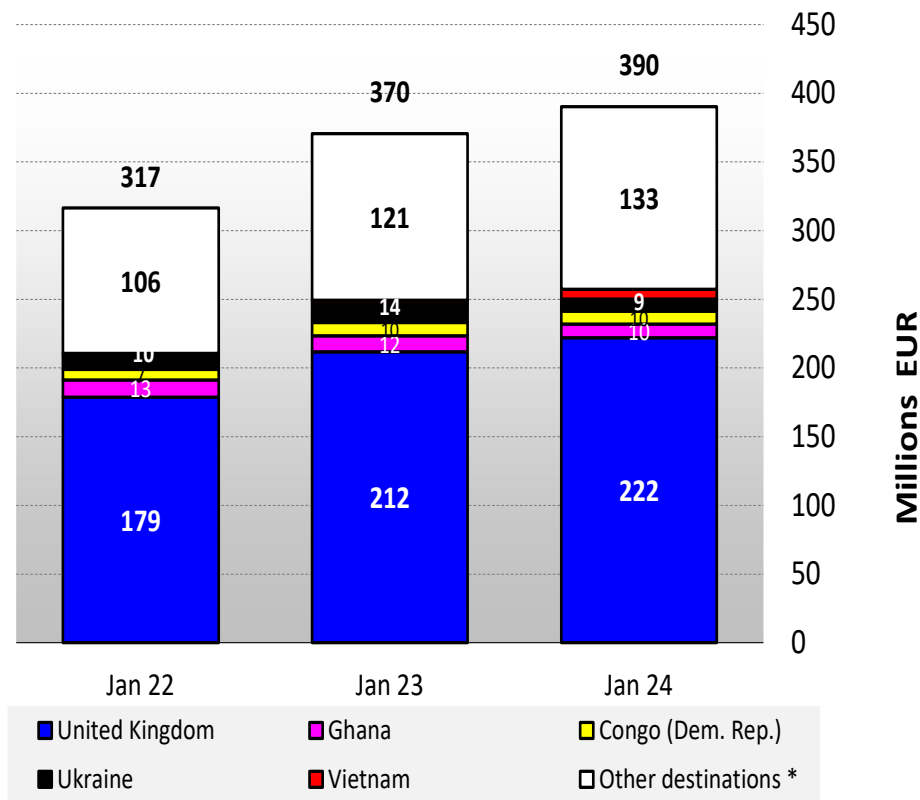
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## EU-27 poultry meat export (by destination)

### EU EXPORTS of Poultry Meat (TONNES cwe)



### EU EXPORTS of Poultry Meat (Millions EUR)



\* countries trading less than 9 (Millions EUR)

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## EU-27 Imports of poultry meat from selected origins

*In tons of carcass weight equivalent*

	2020		2021		2022		2023		Jan 24		Compared to Jan 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227.738	28%	251.887	32%	301.239	35%	290.268	32%	32.262	37,9%	+ 34,8%
Ukraine	108.669	14%	102.892	13%	162.837	19%	231.640	26%	20.435	24,0%	+ 21,9%
United Kingdom	293.914	37%	274.667	34%	210.851	25%	169.897	19%	16.452	19,3%	+ 81,8%
Thailand	131.374	16%	130.658	16%	131.223	15%	148.677	17%	11.625	13,6%	- 12,5%
China	17.017	2%	20.916	3%	32.864	4%	36.438	4%	2.893	3,4%	+ 1,6%
Chile	14.382	2%	2.441	0%	466	0%	3.238	0%	447	0,5%	+ 47,8%
Argentina	3.273	0%	3.151	0%	4.096	0%	4.086	0%	338	0,4%	+ 42,8%
<i>Other Destinations</i>	<i>8.404</i>	<i>1%</i>	<i>10.445</i>	<i>1%</i>	<i>11.076</i>	<i>1%</i>	<i>10.198</i>	<i>1%</i>	<i>768</i>	<i>0,9%</i>	
<b>Extra-EU</b>	<b>804.772</b>		<b>797.056</b>		<b>854.651</b>		<b>894.440</b>		<b>85.220</b>		
% change			- 1%		+ 7%		+ 5%		+ 26,6%		

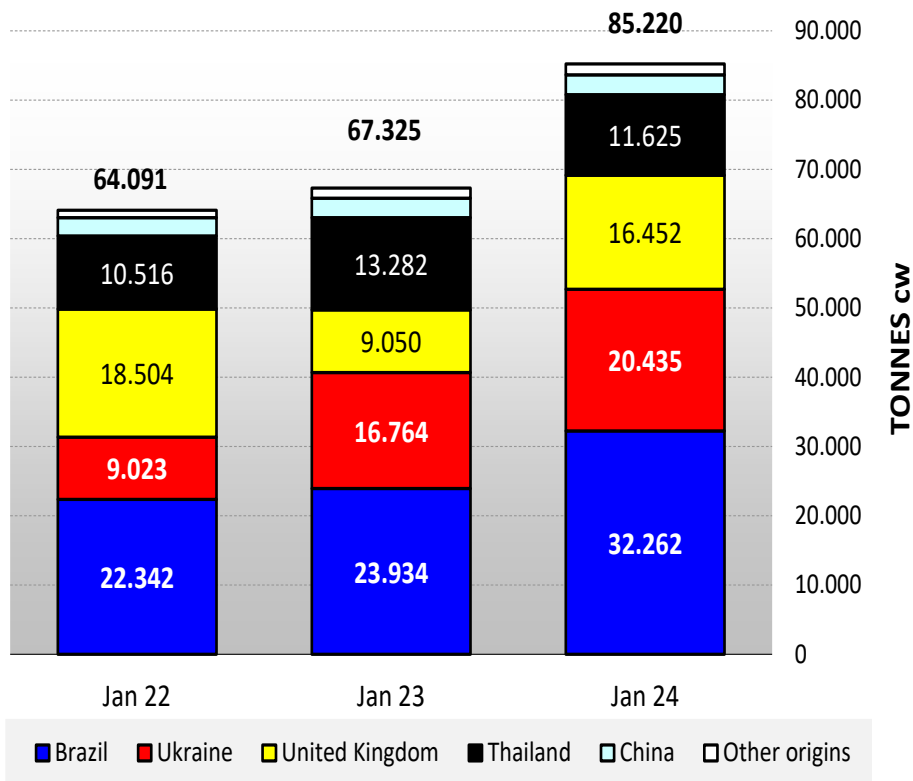
## EU-27 Imports of poultry meat from selected origins

	2020		2021		2022		2023		Jan 24		Compared to Jan 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351.277	24%	388.472	29%	669.772	31%	598.095	28%	59.431	32,3%	+ 15,8%
Ukraine	132.740	9%	166.208	12%	324.836	15%	417.671	20%	36.554	19,9%	+ 28,3%
United Kingdom	501.768	34%	327.273	24%	368.062	17%	351.512	17%	32.383	17,6%	+ 56,4%
Thailand	316.860	22%	317.487	24%	519.225	24%	489.838	23%	36.904	20,0%	- 31,2%
China	78.298	5%	95.081	7%	186.175	9%	182.533	9%	13.558	7,4%	- 13,8%
Chile	35.557	2%	6.019	0%	1.537	0%	7.325	0%	988	0,5%	+ 20,4%
Argentina	6.515	0%	6.508	0%	11.463	1%	11.396	1%	1.049	0,6%	+ 30,1%
Switzerland	6.229	0%	5.300	0%	8.975	0%	6.730	0%	587	0,3%	- 26,2%
Bosnia-Herz.	7.809	1%	10.345	1%	10.728	1%	9.362	0%	859	0,5%	+ 35,9%
Norway	5.280	0%	7.914	1%	8.286	0%	8.872	0%	733	0,4%	- 10,2%
<i>Other Destinations</i>	16.429	1%	15.466	1%	18.949	1%	19.805	1%	1.043	0,6%	
<b>Extra-EU</b>	<b>1.458.760</b>		<b>1.346.074</b>		<b>2.128.008</b>		<b>2.103.140</b>		<b>184.090</b>		
% change			- 8%		+ 58%		- 1%		+ 4,5%		

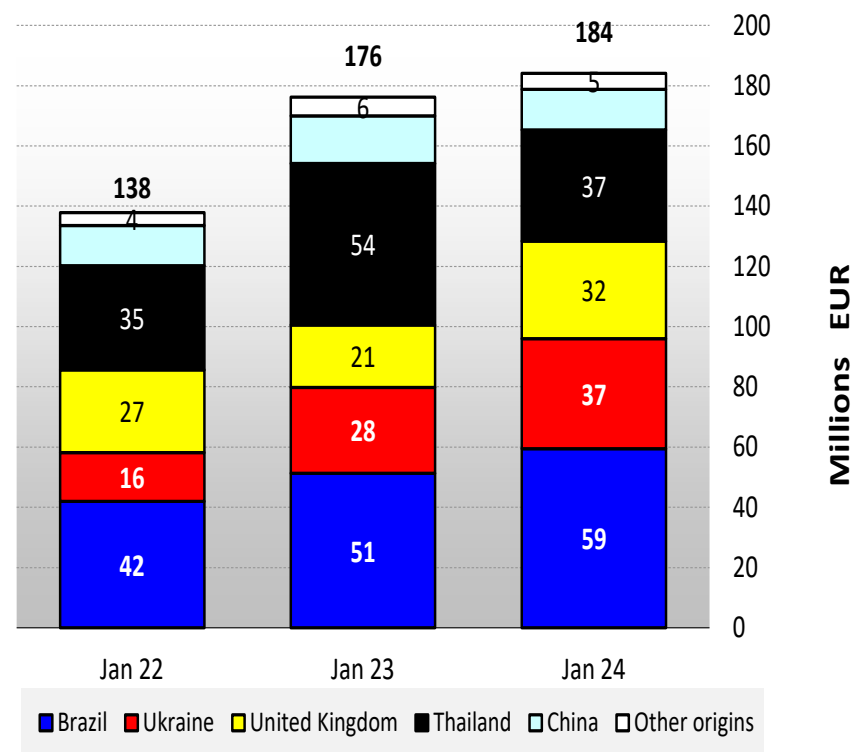
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## EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)

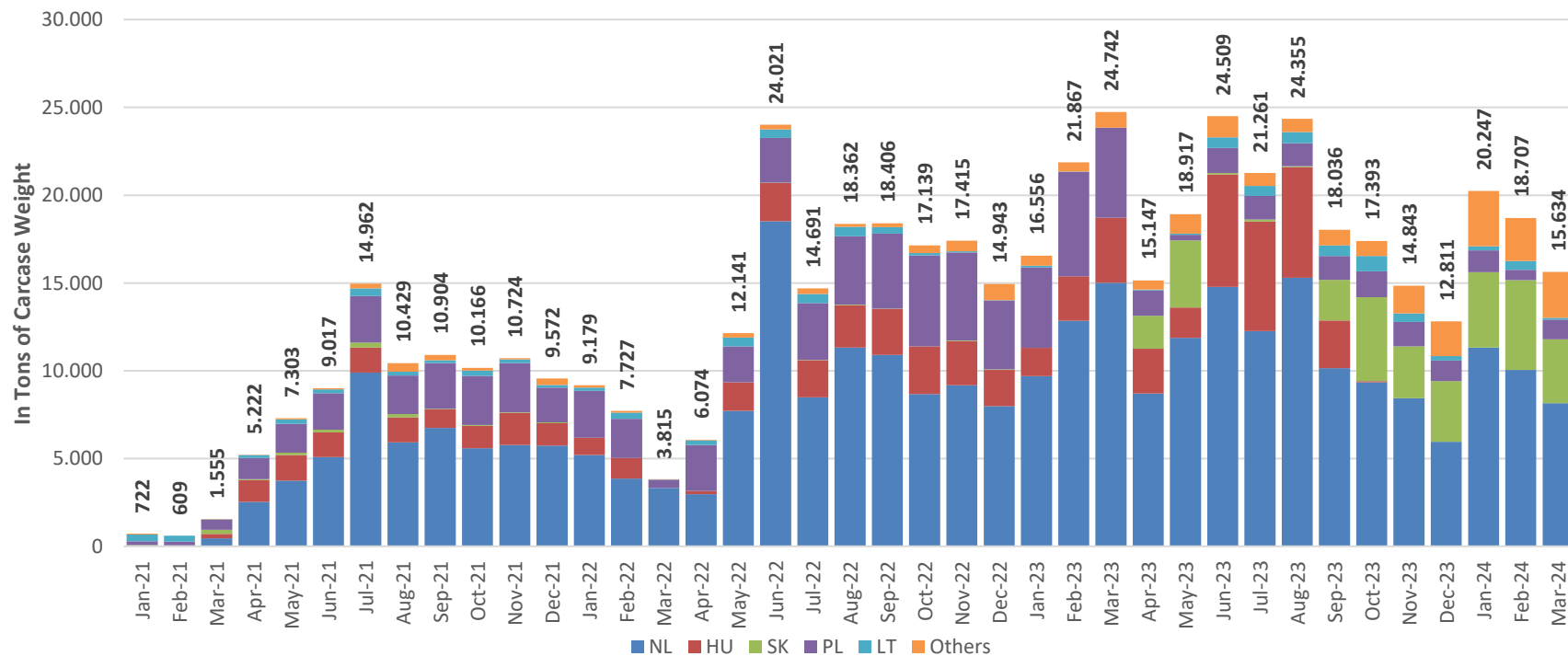


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## EU-27 Imports of poultry meat from Ukraine

EU Imports of Poultry Meat from Ukraine



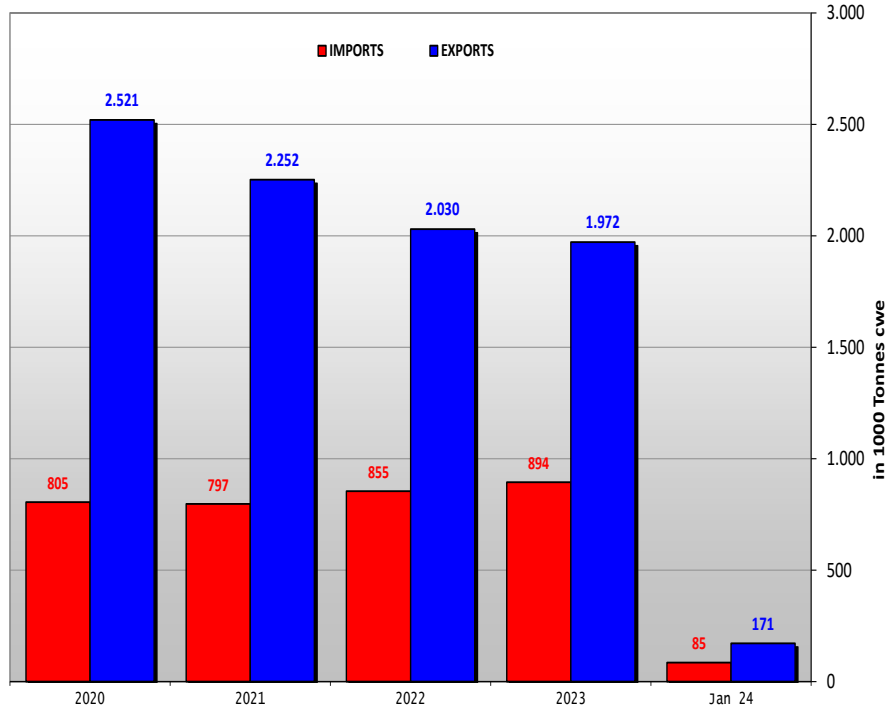
DG AGRI E3, source: **TAXUD surveillance**.  
 Please note that data is not completely stabilized for most recent periods.

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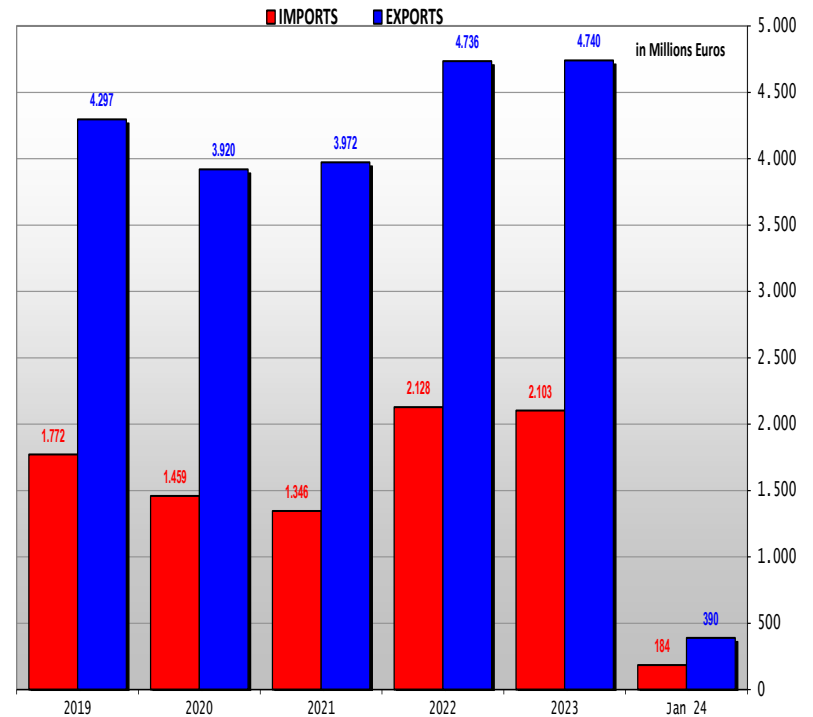
# TRADE

# 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](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](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](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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