

EU Market Situation for Poultry



Expert Group for Agricultural Markets

23 May 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
EU27	14,107,974	14,397,224	14,550,507	2.1	1.1

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
EU27	11,915,056	12,121,471	12,239,500	1.7	1.0

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					
EU27	1,766,437	1,803,533	1,804,657	2.1	0.1

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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					
EU27	363,665	402,255	435,415	10.6	8.2

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					
EU27	122,742	115,422	110,982	-6.0	-3.8

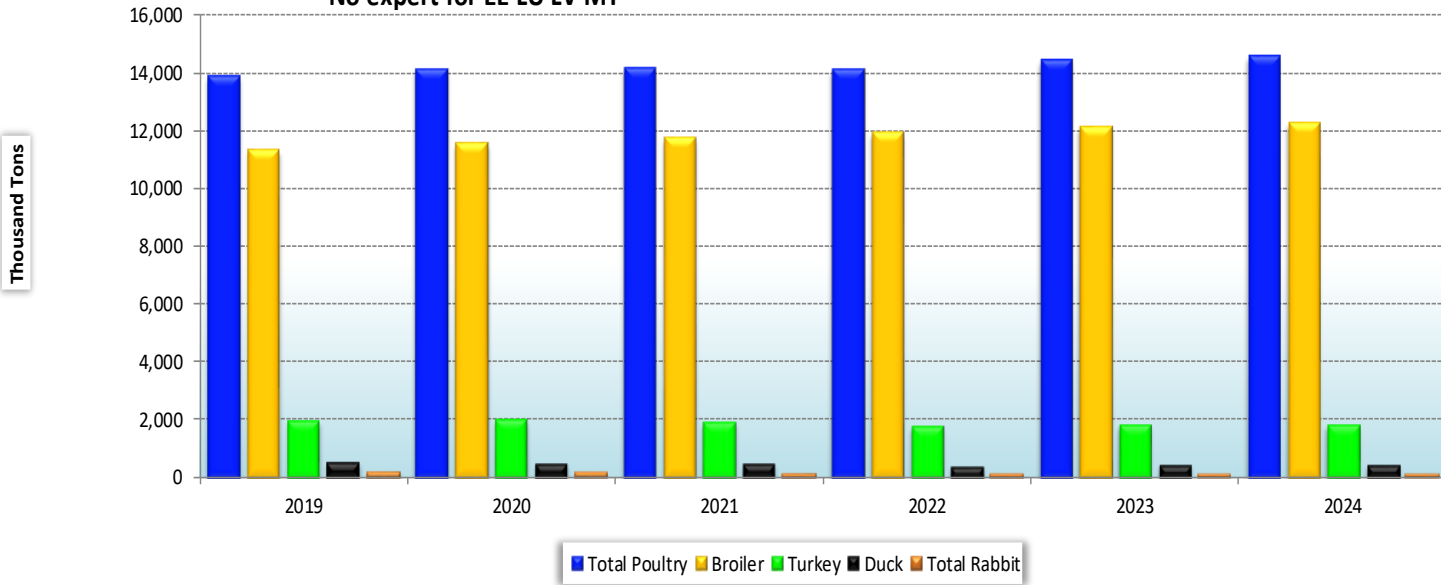
23 May 2024

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

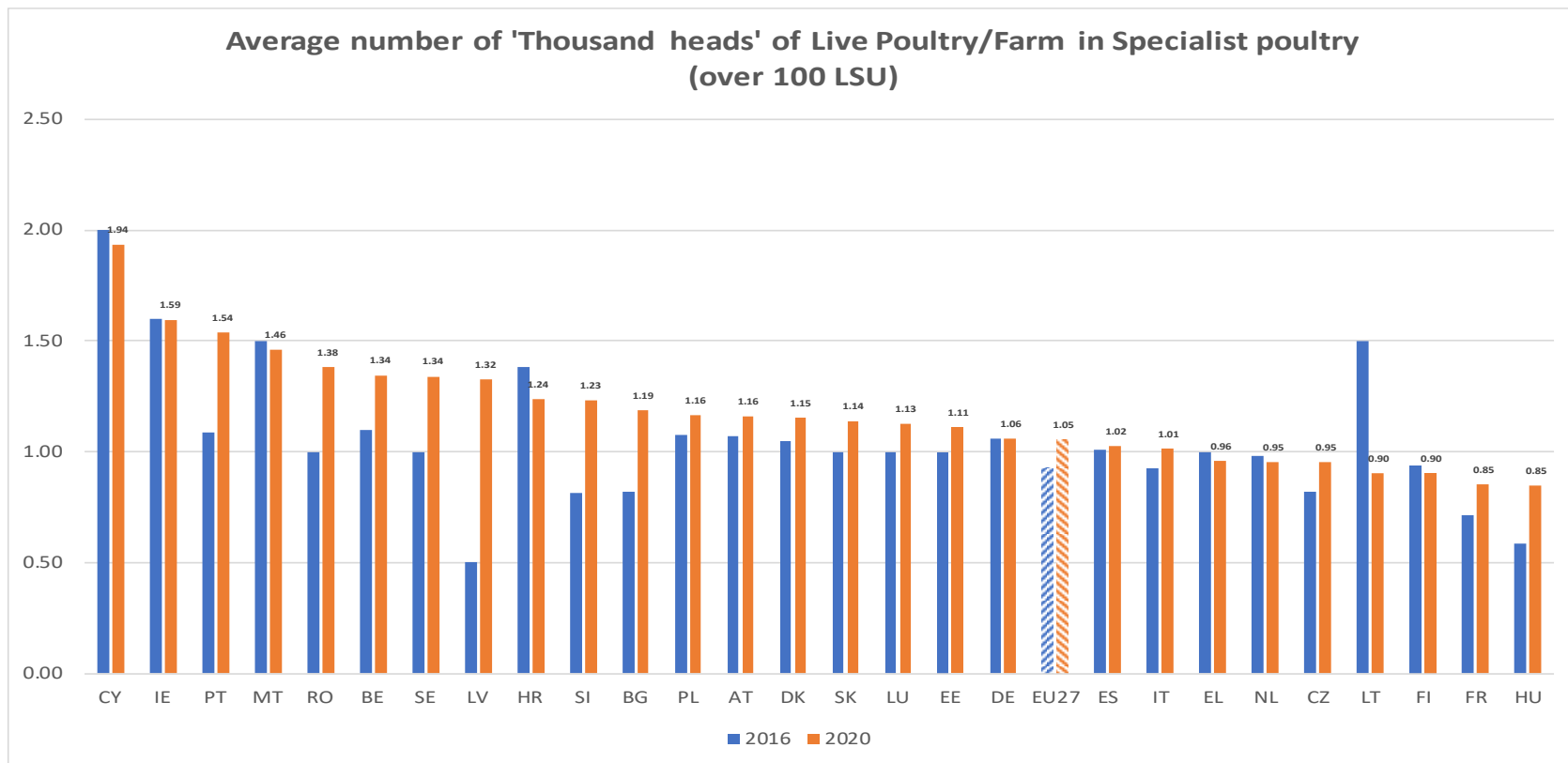


	2019	2020	2021	2022	2023	2024	% 2023/ 2022	% 2024/ 2023
Total Poultry	13,860	14,072	14,125	14,108	14,397	14,551	+ 2.1%	+ 1.1%
Broiler	11,289	11,544	11,732	11,915	12,121	12,240	+ 1.7%	+ 1.0%
Turkey	1,946	2,013	1,888	1,766	1,804	1,805	+ 2.1%	+ 0.1%
Duck	518	452	458	364	402	435	+ 10.6%	+ 8.2%
Total Rabbit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

23 May 2024

FARM STRUCTURE SURVEY

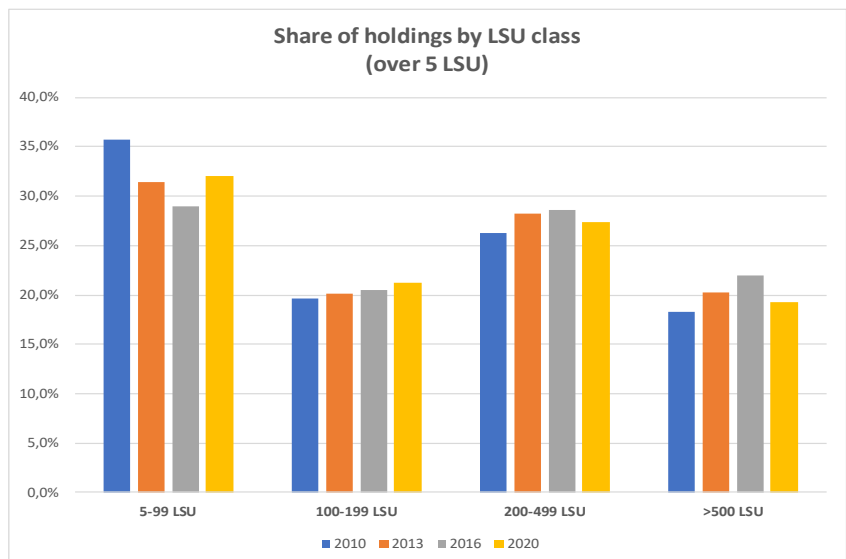
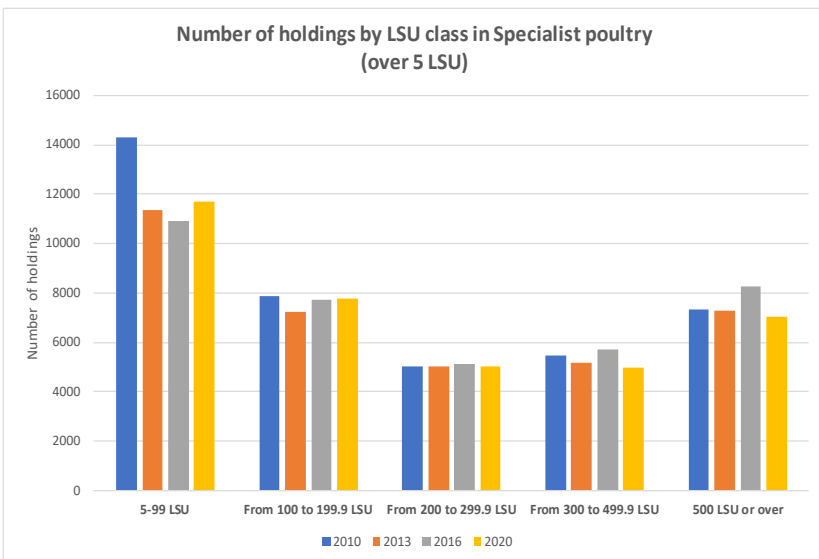
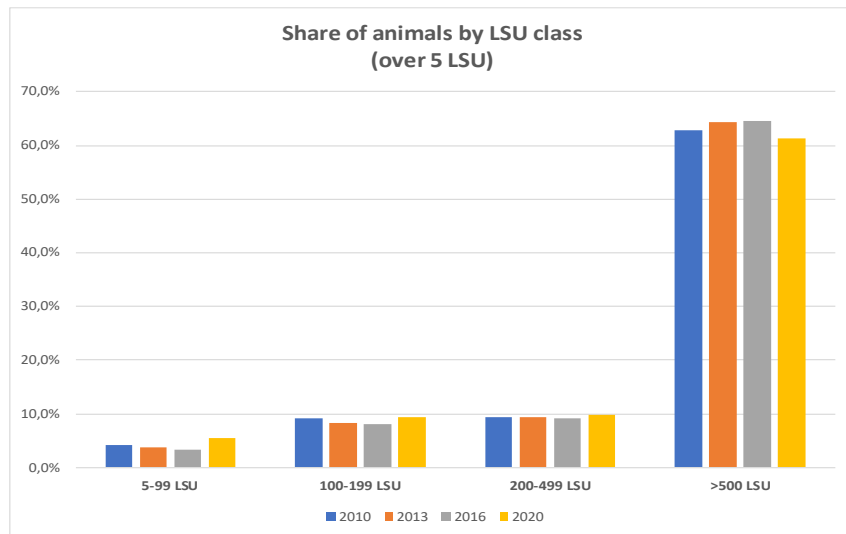
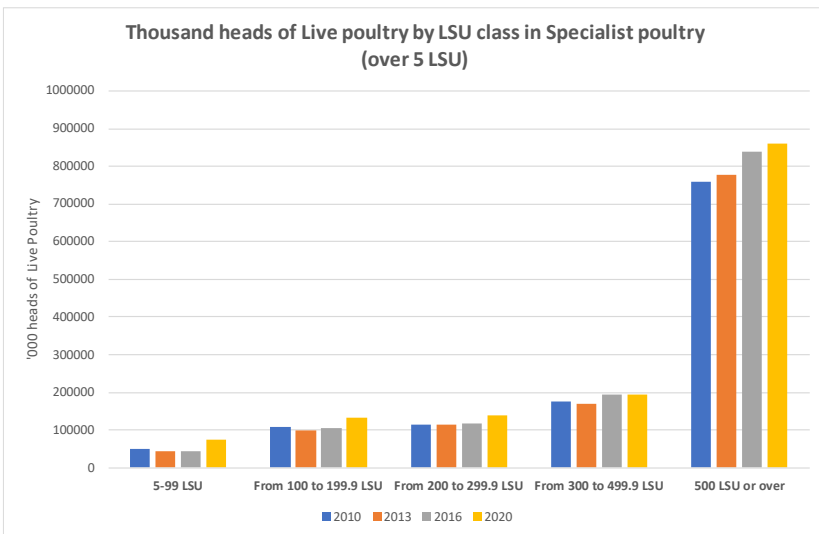
LSU for poultry:
 broiler- 0,007
 laying hen- 0,014
 turkey- 0,03
 duck- 0,01
 geese- 0,02



Specialist poultry - EU

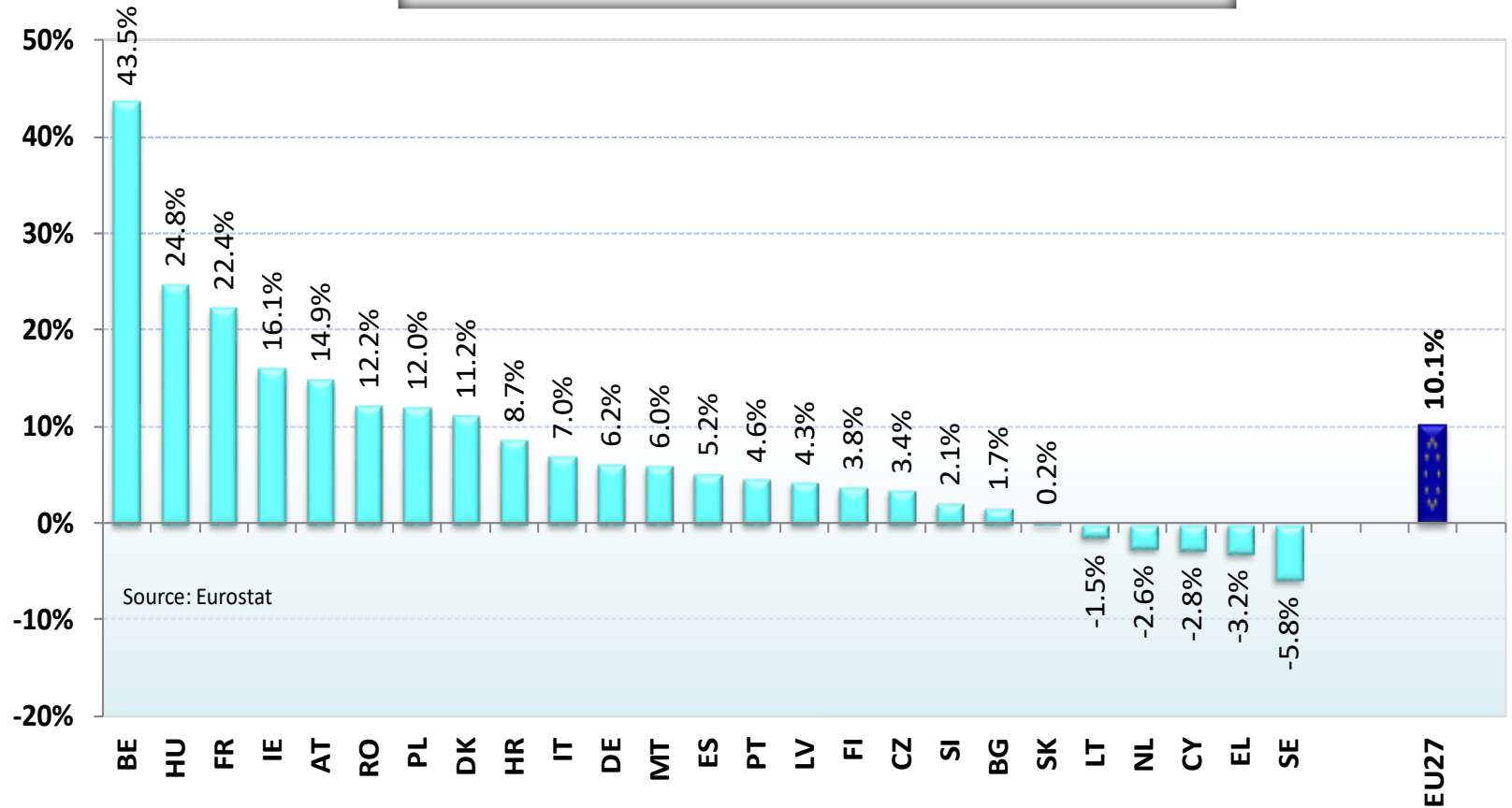
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY



PRODUCTION

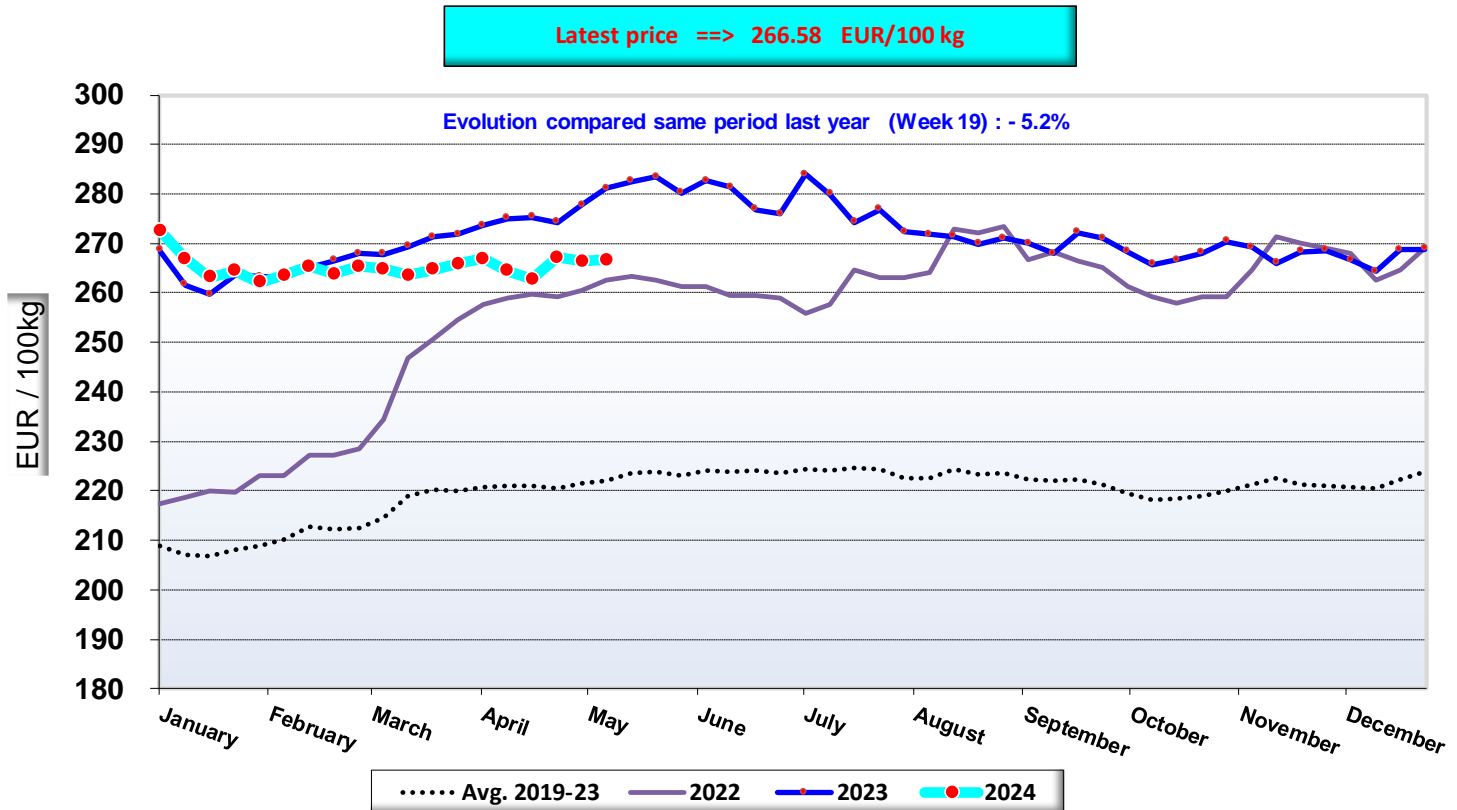
Change in Poultry Meat Production in %
2024/2023 (up to February)



Source: Eurostat

23 May 2024

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

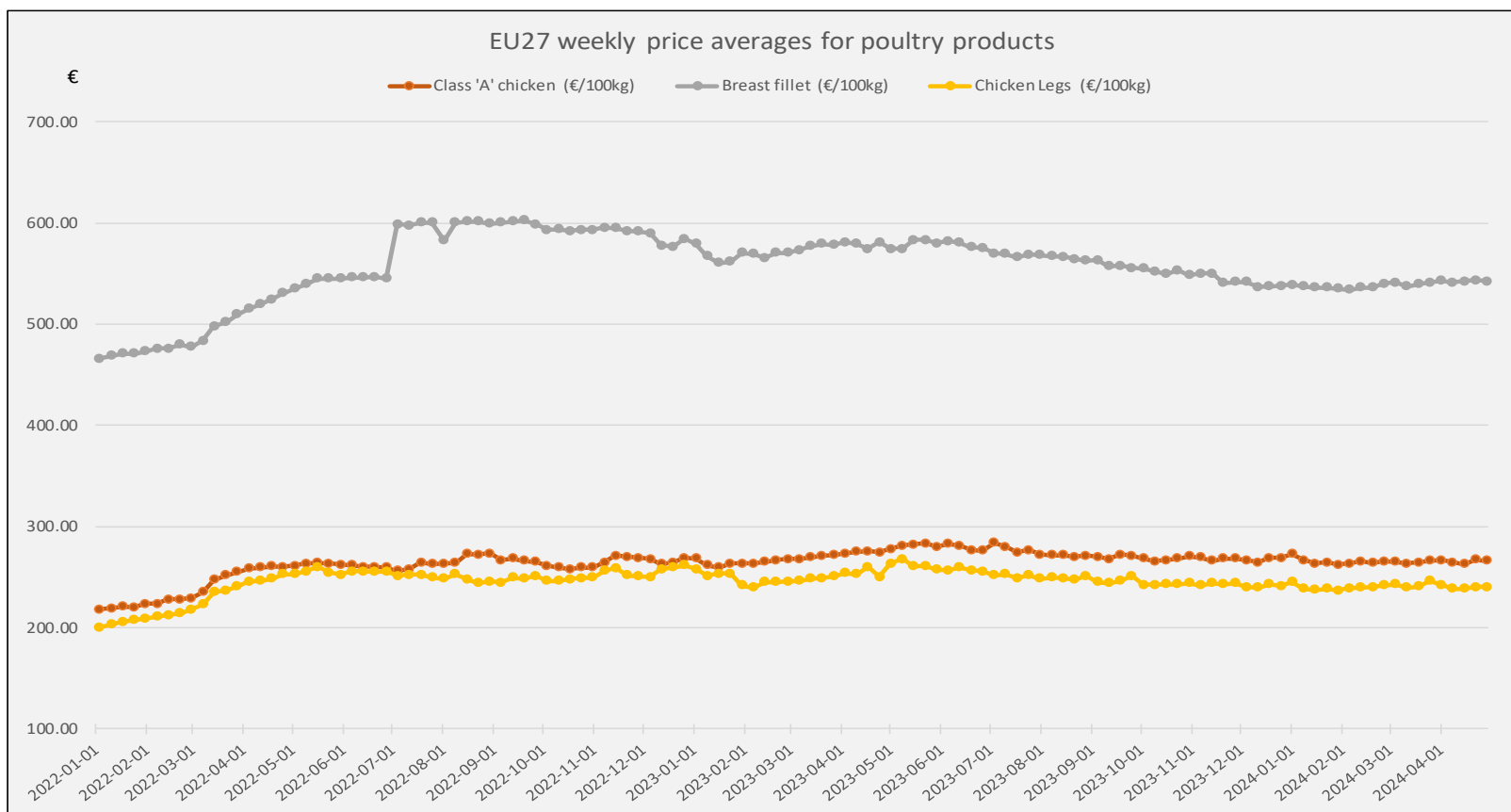


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

23 May 2024

Weekly prices of poultry products

Week - 18 EU27 weekly price averages for poultry products

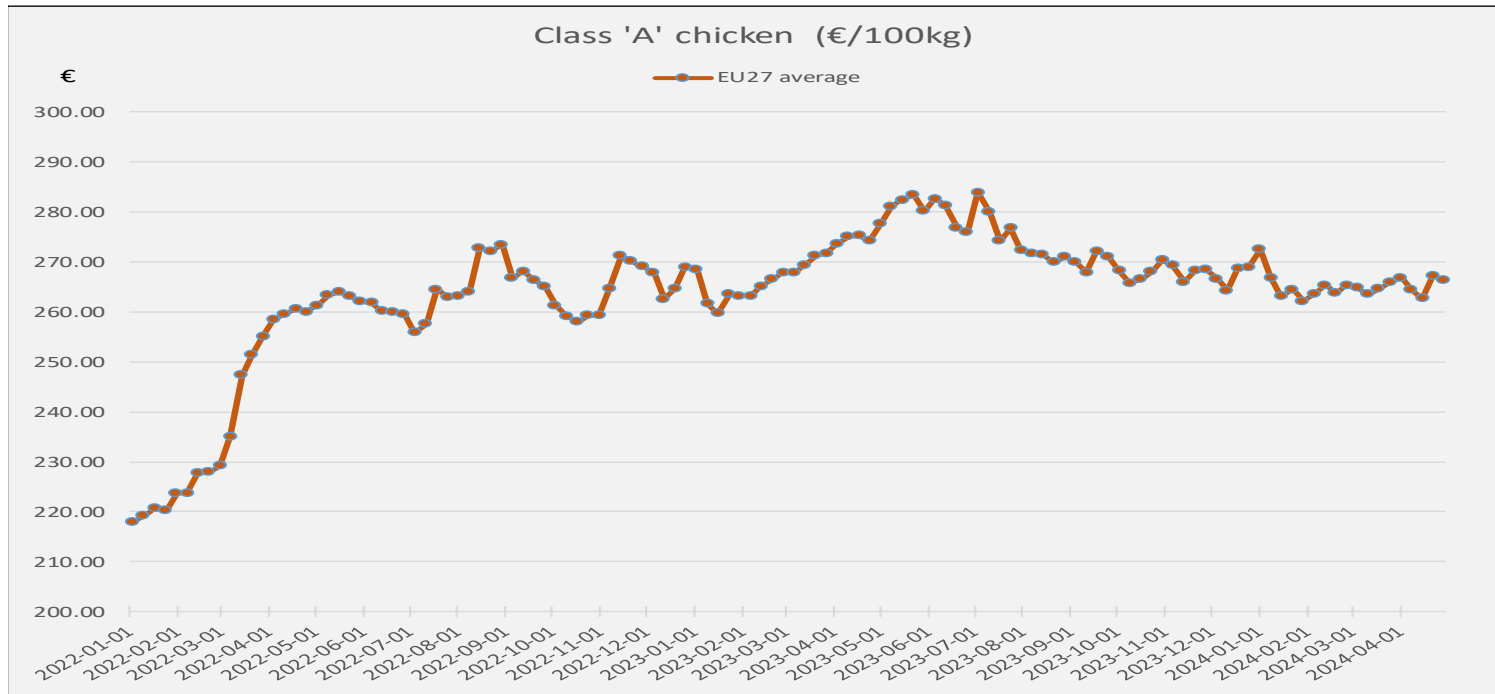


Week - 18	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	266.40	542.29	240.12

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

Weekly price of 'Class A Chicken'

Week - 18 Class 'A' chicken



Week - 18	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	266.40	- 0.3%	- 0.2%	- 4.1%

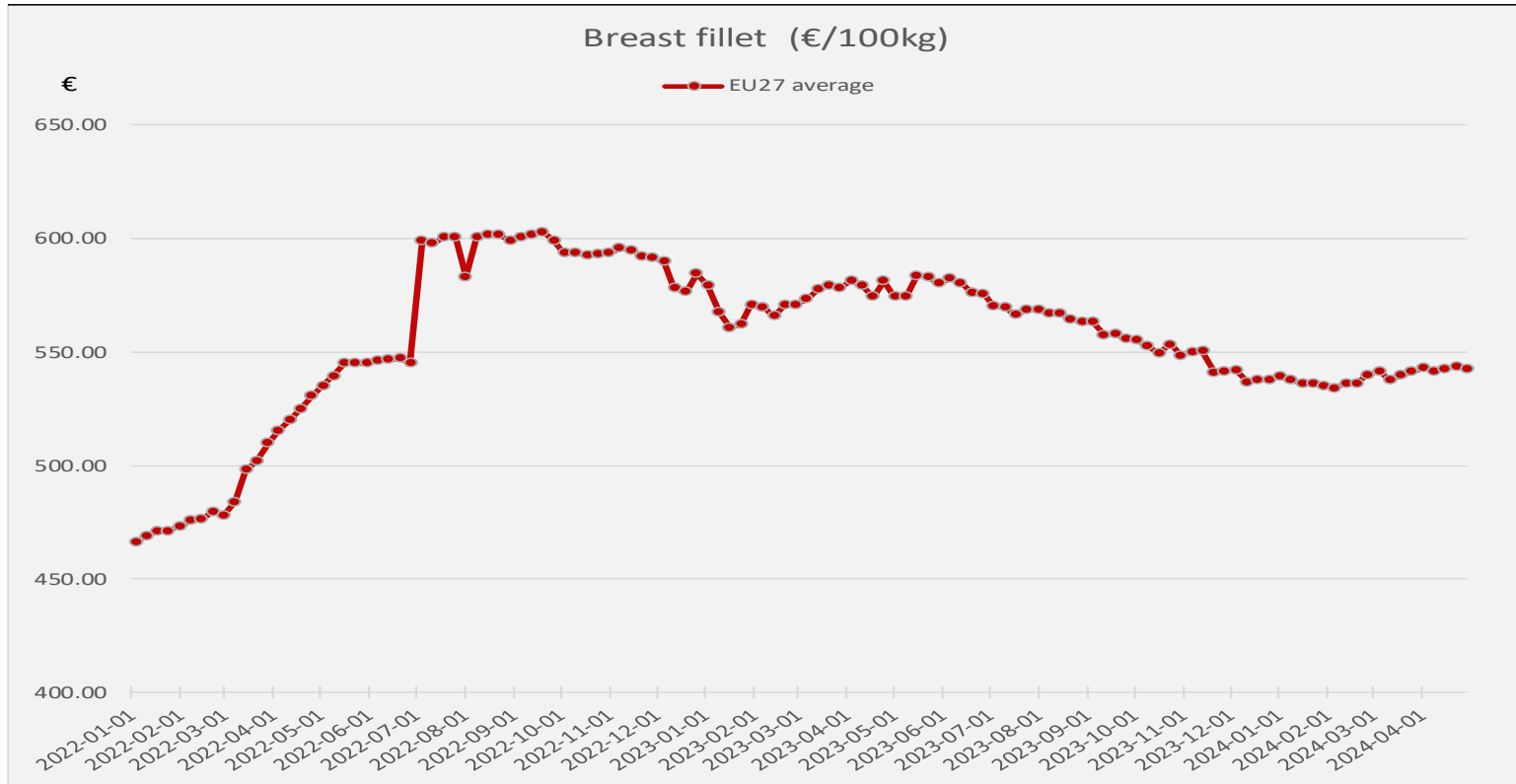
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

23 May 2024

Weekly price of 'Breast fillet'

Week - 18 Breast fillet



Week - 18	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	542.29	- 0.2%	- 0.1%	- 5.6%

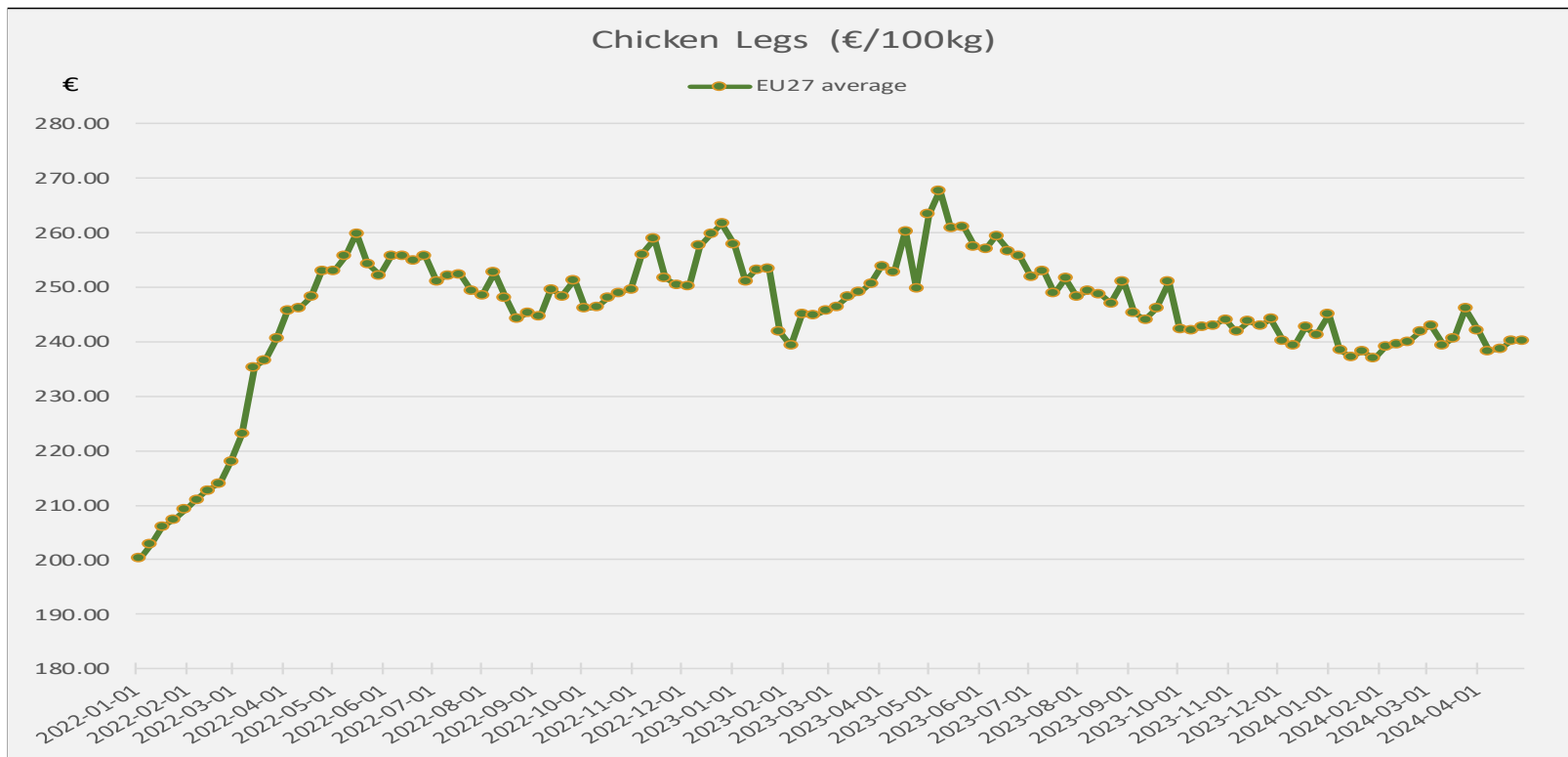
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

23 May 2024

Weekly price of 'Chicken legs'

Week - 18 Chicken Legs

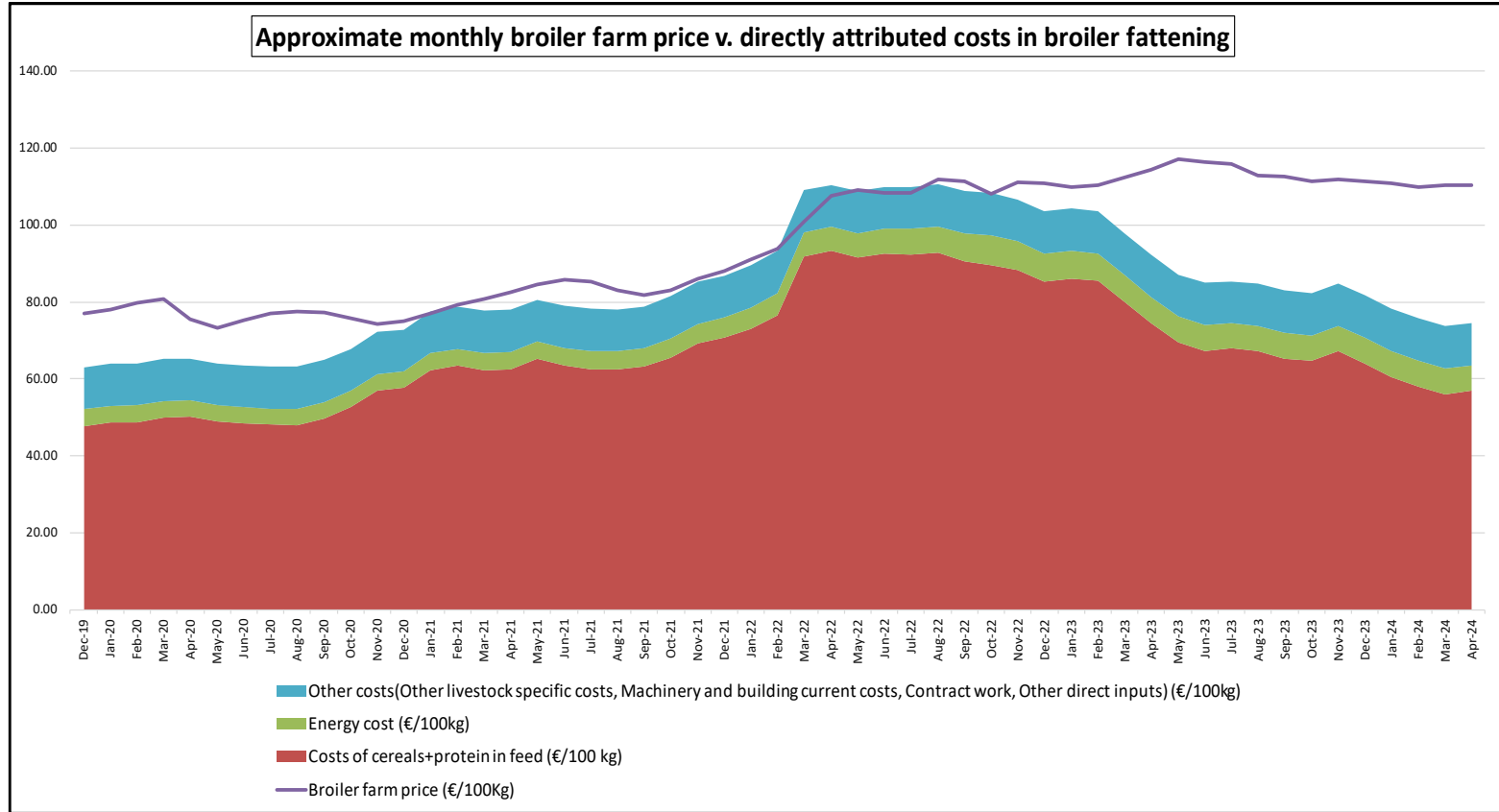


Week - 18	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	240.12	+ 0.0%	- 0.8%	- 8.9%

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

23 May 2024

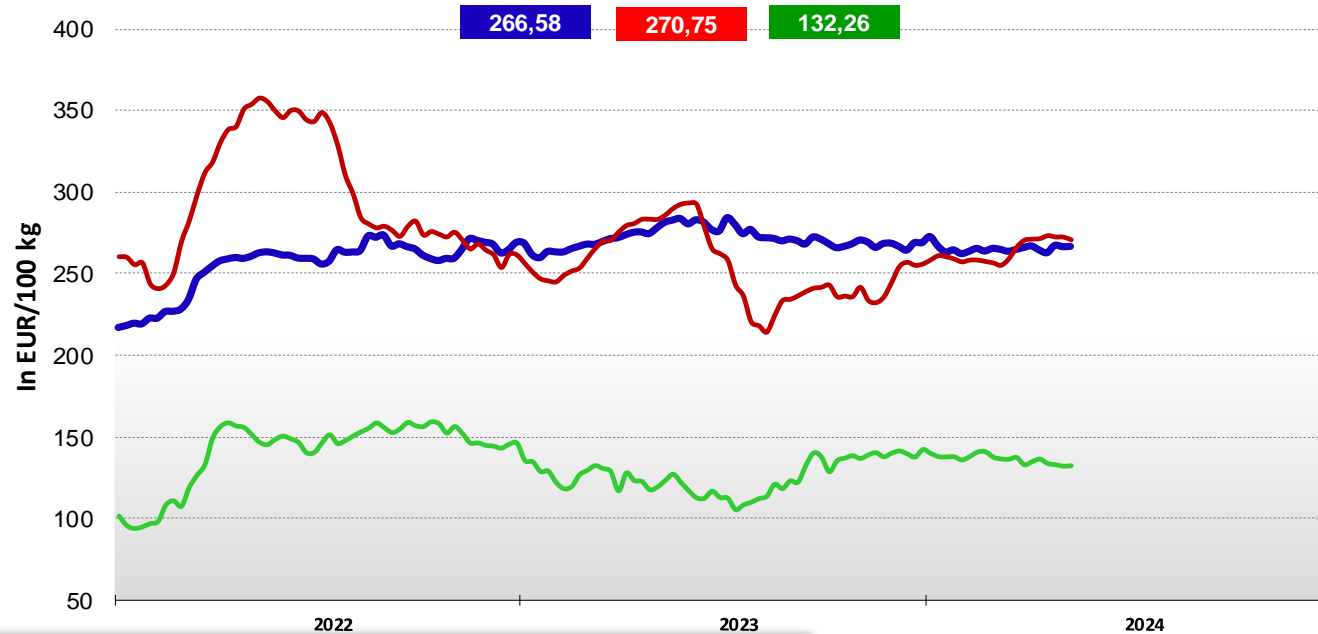
COST BROILER PRODUCTION



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 !

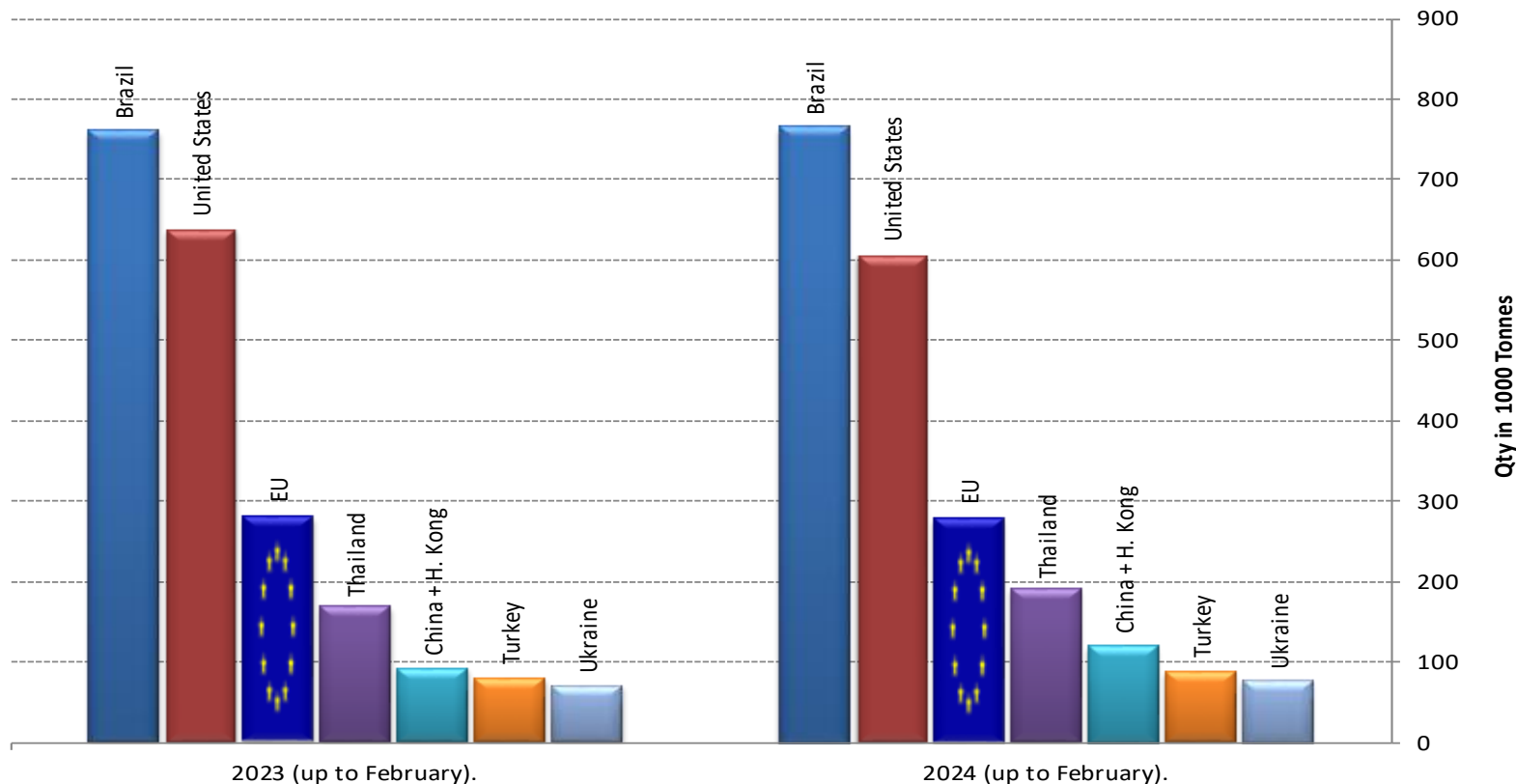
Broiler prices in EU, USA and Brazil



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

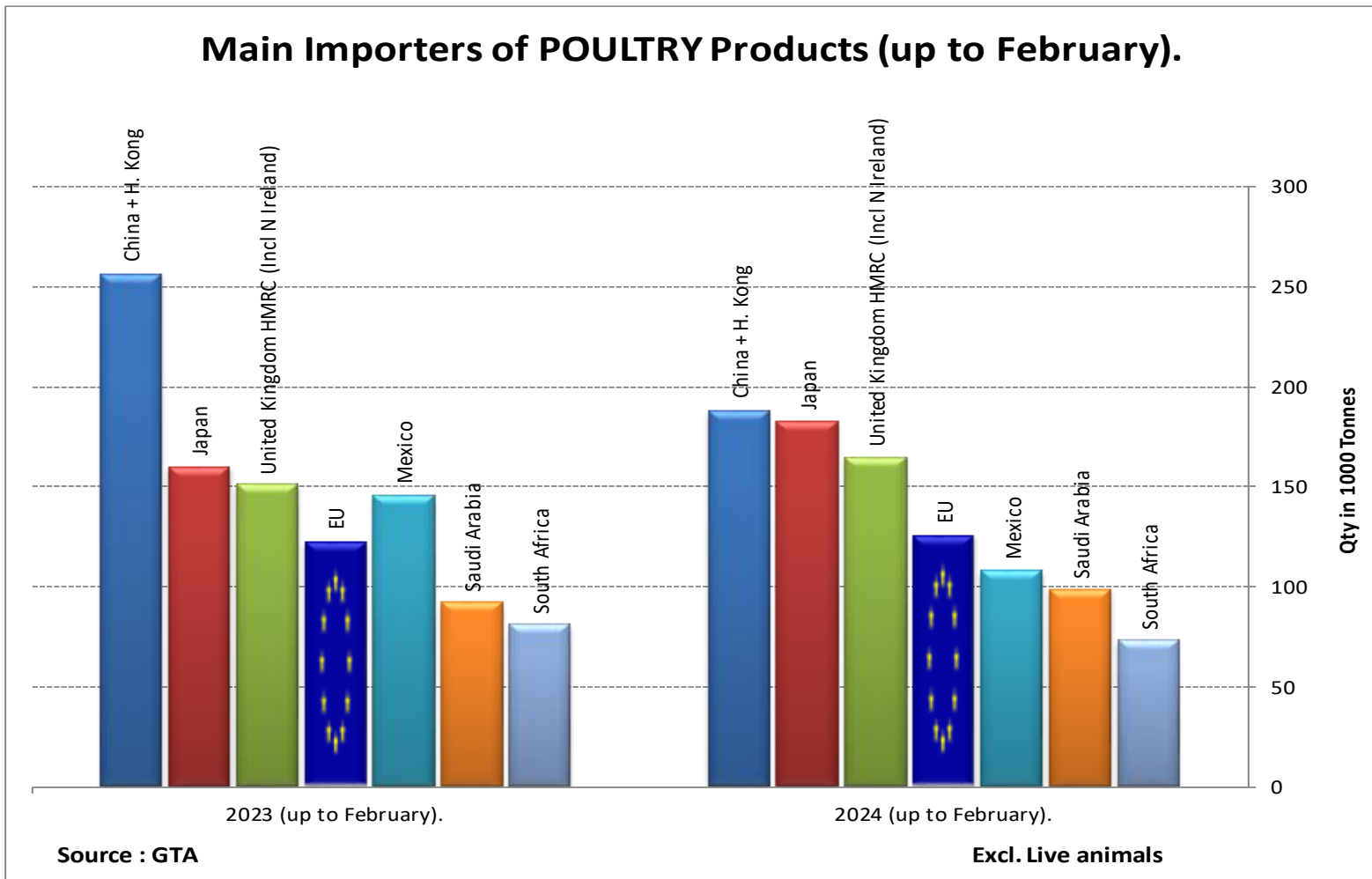
Main Exporters of POULTRY Products (up to February).



Source : GTA

Excl. Live animals

Main Importers of POULTRY Products (up to February).



Source : GTA

Excl. Live animals

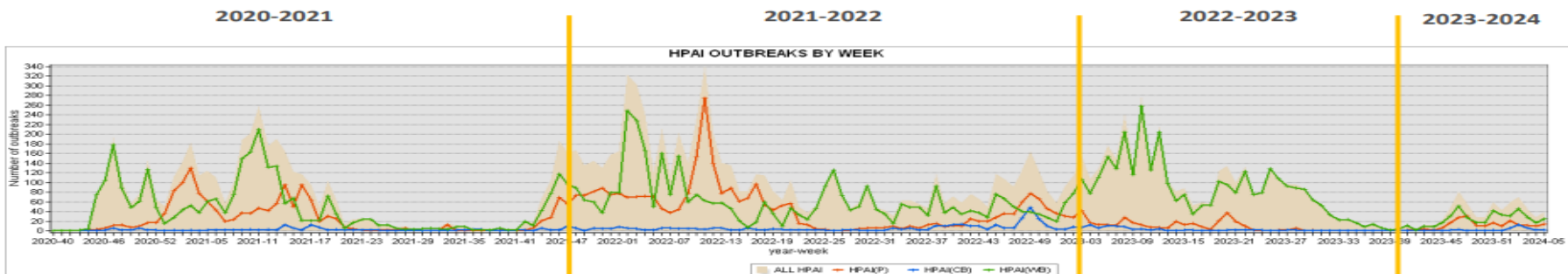
23 May 2024

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2023 – 16/05/2024)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
BG	22	2.111.631	9,7%	29,6%
HU	84	1.750.174	37,2%	24,6%
PL	34	868.764	15,0%	12,2%
DE	29	561.365	12,8%	7,9%
FR	9	402.162	4,0%	5,6%
SK	7	295.369	3,1%	4,1%
DK	13	264.437	5,8%	3,7%
Other MS	28	873.389	0	0
Grand Total	226	7.127.291	100,0%	100,0%

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	14	1.064.860	6,2%	14,9%
Laying hen	27	1.379.947	11,9%	19,4%
Duck	48	1.127.954	21,2%	15,8%
Turkey	71	1.639.152	31,4%	23,0%
Goose	24	131.616	10,6%	1,8%
Guinea fowl	1	17.256	0,4%	0,2%
Pheasant	2	9.785	0,9%	0,1%
Mixed	9	35.115	4,0%	0,5%
No information	30	1.721.606	13,3%	24,2%
Grand Total	226	7.127.291	100,0%	100,0%



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

	2020		2021		2022		2023		Jan-Feb 24		Compared to Jan-Feb 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811,675	32%	725,611	32%	732,508	36%	729,904	37%	120,978	35.0%	+ 6.1%
Congo (Dem. Rep.)	101,987	4%	139,852	6%	125,421	6%	101,032	5%	22,853	6.6%	+ 70.8%
Ghana	213,838	8%	228,066	10%	156,456	8%	148,853	8%	20,578	5.9%	- 17.6%
Ukraine	145,871	6%	162,267	7%	105,810	5%	84,641	4%	13,251	3.8%	- 20.1%
Vietnam	50,977	2%	31,784	1%	29,751	1%	54,214	3%	12,676	3.7%	+++
Saudi Arabia	74,407	3%	58,457	3%	74,590	4%	66,759	3%	11,447	3.3%	- 4.4%
Cuba	55,039	2%	11,056	0%	38,874	2%	30,534	2%	10,897	3.1%	+++
Congo	28,551	1%	30,303	1%	35,562	2%	46,994	2%	7,665	2.2%	+ 61.3%
Switzerland	30,592	1%	33,390	1%	33,784	2%	34,794	2%	6,325	1.8%	+ 20.0%
Liberia	27,930	1%	32,328	1%	33,782	2%	20,251	1%	5,929	1.7%	+++
<i>Other Destinations</i>	<i>979,884</i>	<i>39%</i>	<i>799,260</i>	<i>35%</i>	<i>663,696</i>	<i>33%</i>	<i>652,719</i>	<i>33%</i>	<i>113,348</i>	<i>32.8%</i>	
Extra-EU	2,520,753		2,252,374		2,030,235		1,970,697		345,948		
% change			- 11%		- 10%		- 3%		+ 16.5%		

23 May 2024

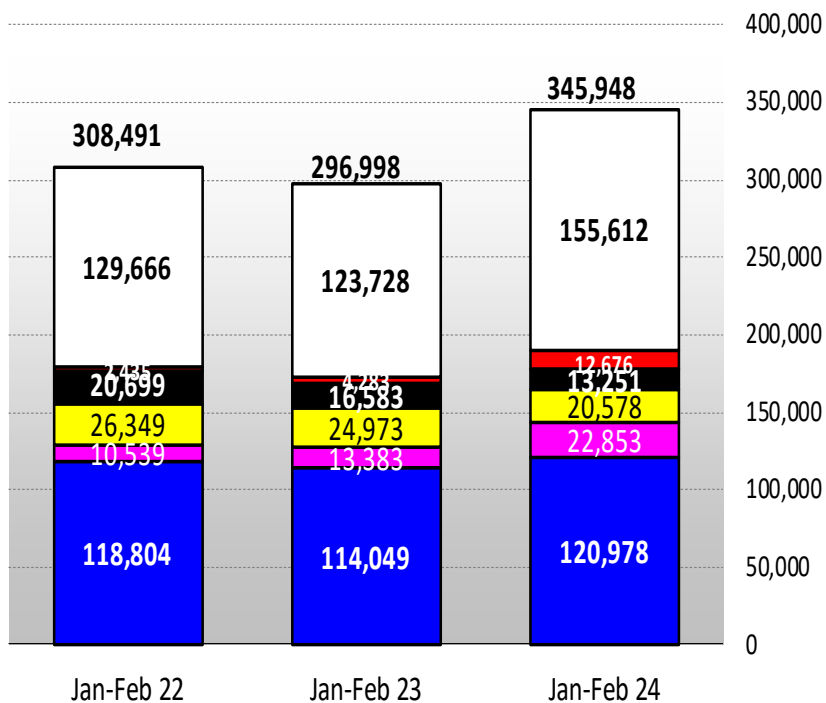
EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan-Feb 24		Compared to Jan-Feb 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%	2,587,516	66%	412,568	10.5%	+ 0.3%
Congo (Dem. Rep.)	81,033	2%	116,553	3%	145,766	4%	112,070	3%	23,832	0.6%	+ 40.1%
Ghana	172,363	4%	224,103	6%	167,715	4%	156,341	4%	20,791	0.5%	- 23.6%
Ukraine	100,109	3%	119,533	3%	102,729	3%	125,704	3%	17,745	0.5%	- 35.4%
Vietnam	55,251	1%	35,592	1%	39,533	1%	67,637	2%	14,828	0.4%	+++
Saudi Arabia	104,518	3%	93,283	2%	159,672	4%	128,774	3%	24,272	0.6%	+ 15.8%
Cuba	48,465	1%	12,697	0%	38,523	1%	28,467	1%	14,169	0.4%	+++
Congo	23,311	1%	26,636	1%	36,276	1%	42,993	1%	6,864	0.2%	+ 37.7%
Switzerland	162,550	4%	179,202	5%	210,024	5%	221,548	6%	36,695	0.9%	+ 5.4%
Liberia	13,241	0%	20,672	1%	27,101	1%	20,227	1%	5,757	0.1%	+ 77.0%
<i>Other Destinations</i>	<i>1,177,287</i>	<i>30%</i>	<i>1,134,409</i>	<i>29%</i>	<i>1,156,406</i>	<i>29%</i>	<i>1,247,833</i>	<i>32%</i>	<i>197,122</i>	<i>5.0%</i>	
Extra-EU	3,920,057		3,972,355		4,736,138		4,739,111		774,642		
% change			+ 1%		+ 19%		+ 0%		+ 5.8%		

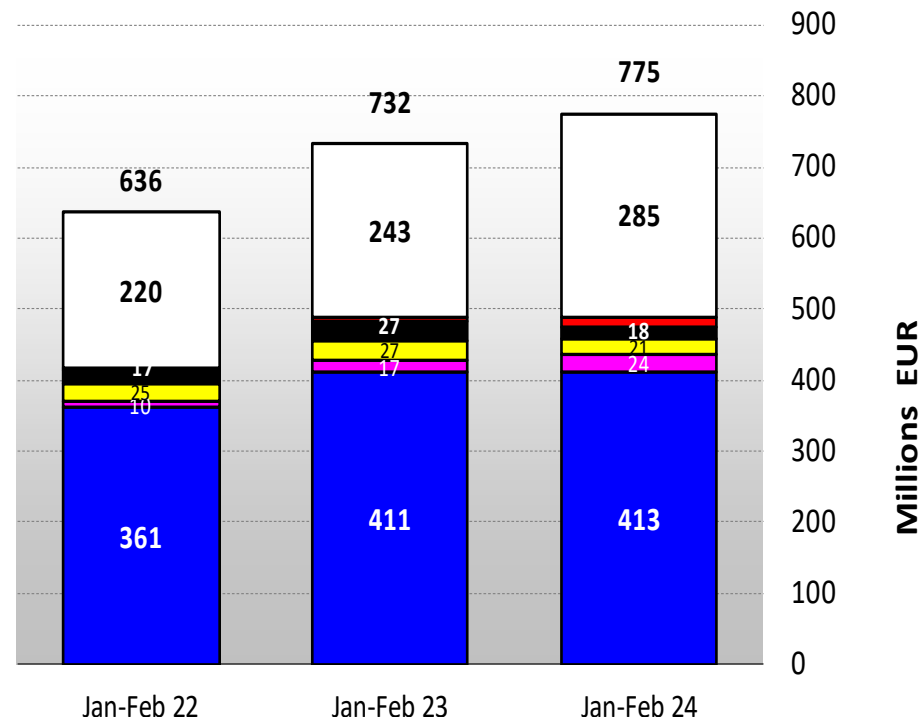
23 May 2024

EU-27 poultry meat export (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



■ United Kingdom ■ Congo (Dem. Rep.) ■ Ghana
■ Ukraine ■ Vietnam Other destinations *

■ United Kingdom ■ Congo (Dem. Rep.) ■ Ghana
■ Ukraine ■ Vietnam Other destinations *

* countries trading less than 18 ('Millions EUR)

23 May 2024

EU-27 Imports of poultry meat from selected origins

In tons of carcass weight

	2020		2021		2022		2023		Jan-Feb 24		Compared to Jan-Feb 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227,738	28%	251,887	32%	301,239	35%	290,222	32%	50,930	33.1%	+ 4.9%
Ukraine	108,669	14%	102,892	13%	162,837	19%	231,641	26%	39,270	25.5%	+ 1.5%
United Kingdom	293,914	37%	274,667	34%	210,851	25%	170,017	19%	29,697	19.3%	+ 55.3%
Thailand	131,374	16%	130,658	16%	131,223	15%	148,602	17%	24,615	16.0%	+ 3.0%
China	17,017	2%	20,916	3%	32,864	4%	36,467	4%	6,316	4.1%	+ 13.9%
Chile	14,382	2%	2,441	0%	466	0%	3,238	0%	1,063	0.7%	+ 75.3%
Argentina	3,273	0%	3,151	0%	4,096	0%	4,086	0%	765	0.5%	+ 41.6%
Other Destinations	8,404	1%	10,445	1%	11,076	1%	10,200	1%	1,407	0.9%	
Extra-EU	804,772		797,056		854,651		894,473		154,064		
% change			- 1%		+ 7%		+ 5%		+ 11.2%		

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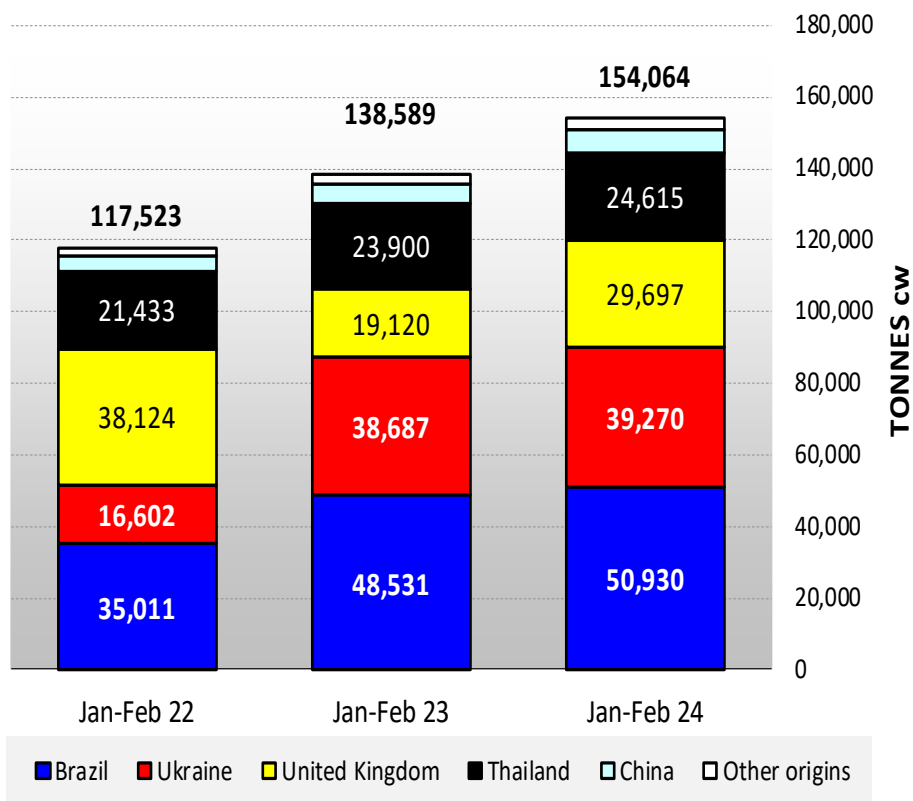
EU-27 Imports of poultry meat from selected origins

	2020		2021		2022		2023		Jan-Feb 24		Compared to Jan-Feb 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351,277	24%	388,472	29%	669,772	31%	598,111	28%	96,558	28.2%	- 4.8%
Ukraine	132,740	9%	166,208	12%	324,836	15%	417,672	20%	70,802	20.7%	+ 6.5%
United Kingdom	501,768	34%	327,273	24%	368,062	17%	352,501	17%	61,859	18.1%	+ 43.5%
Thailand	316,860	22%	317,487	24%	519,225	24%	489,751	23%	73,400	21.4%	- 21.4%
China	78,298	5%	95,081	7%	186,175	9%	182,651	9%	29,300	8.6%	- 0.0%
Chile	35,557	2%	6,019	0%	1,537	0%	7,325	0%	2,272	0.7%	+ 39.2%
Argentina	6,515	0%	6,508	0%	11,463	1%	11,396	1%	1,922	0.6%	+ 17.1%
Norway	5,280	0%	7,914	1%	8,286	0%	8,872	0%	1,468	0.4%	- 0.2%
Bosnia-Herz.	7,809	1%	10,345	1%	10,728	1%	9,362	0%	1,702	0.5%	+ 26.9%
Switzerland	6,229	0%	5,300	0%	8,975	0%	6,730	0%	1,071	0.3%	- 21.9%
<i>Other Destinations</i>	16,429	1%	15,466	1%	18,949	1%	19,805	1%	2,240	0.7%	
Extra-EU	1,458,760		1,346,074		2,128,008		2,104,176		342,595		
% change			- 8%		+ 58%		- 1%		- 0.8%		

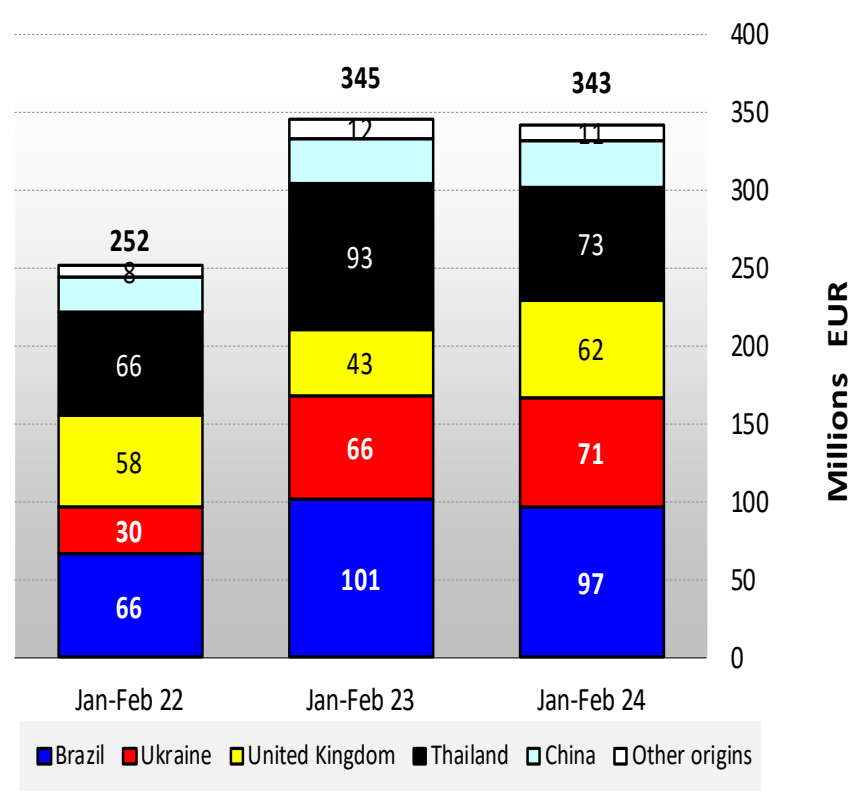
23 May 2024

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

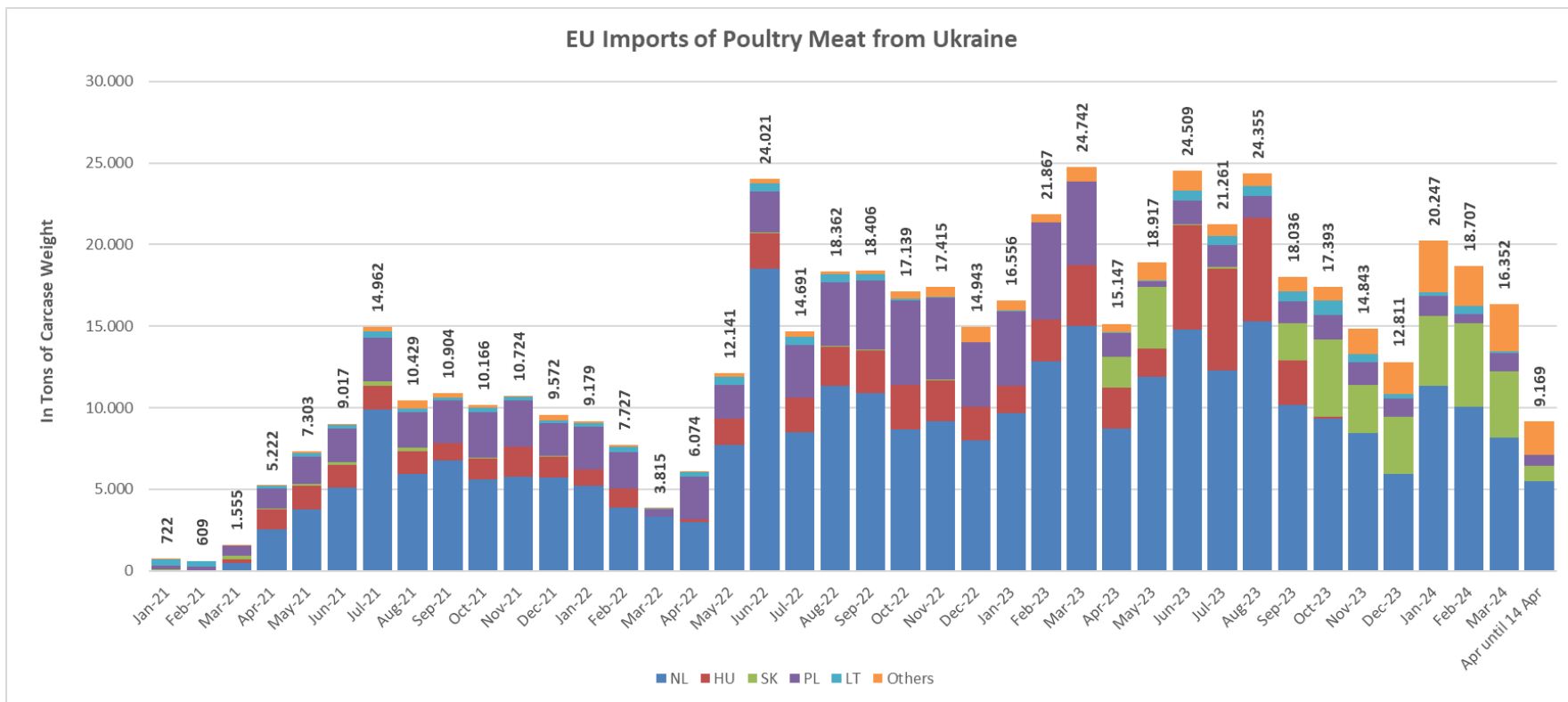


EU IMPORTS of Poultry Meat (Millions EUR)



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EU-27 Imports of poultry meat from Ukraine



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

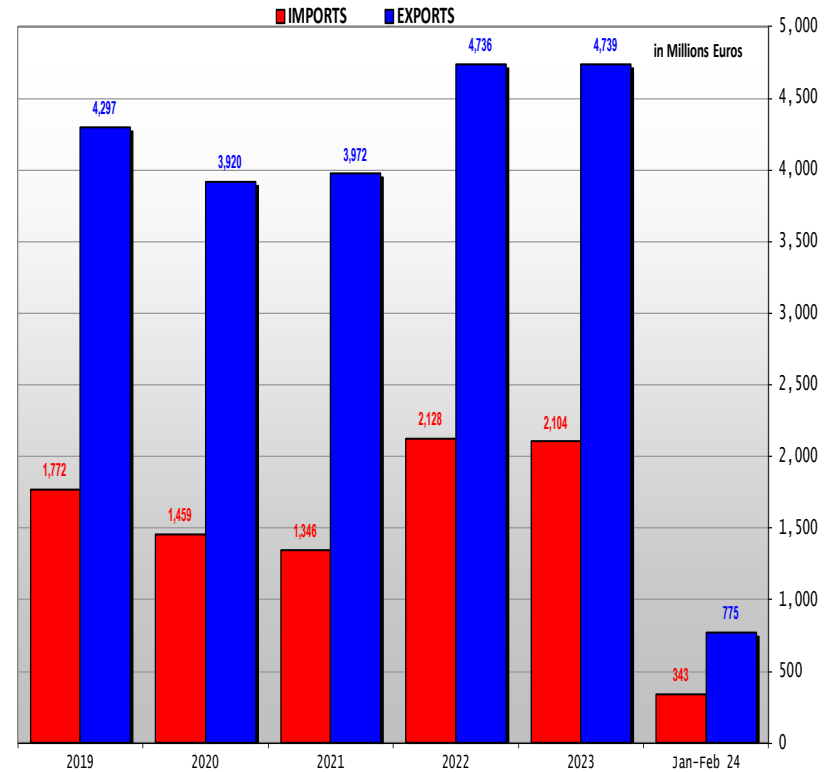
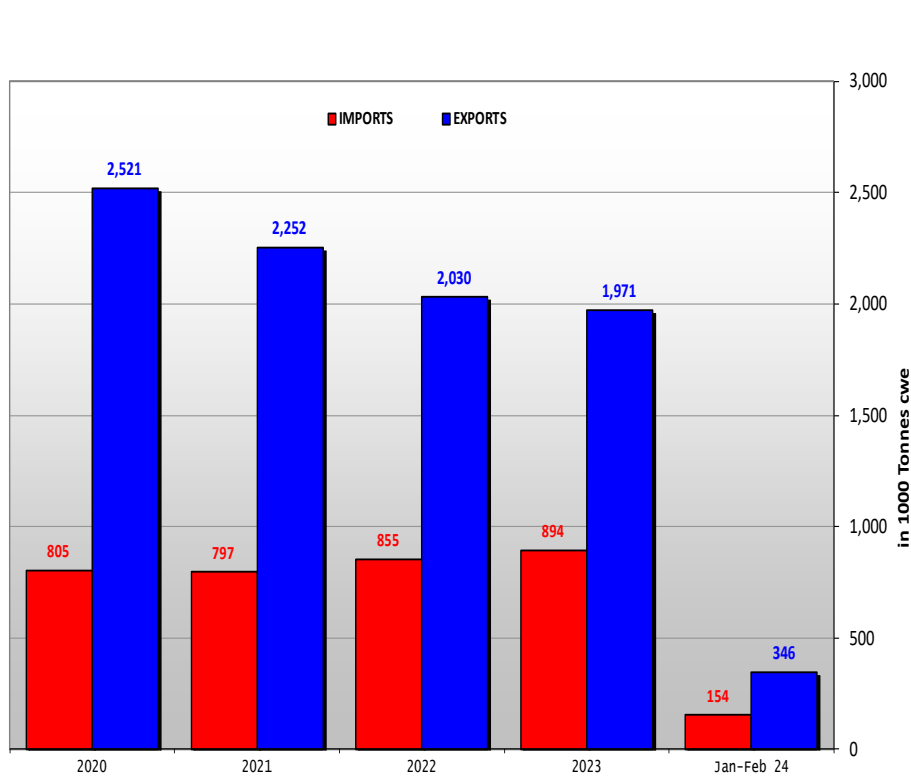
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TRADE

BALANCE

in 1000 tons cwe

in million EUR



23 May 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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