

EU Market Situation for Poultry

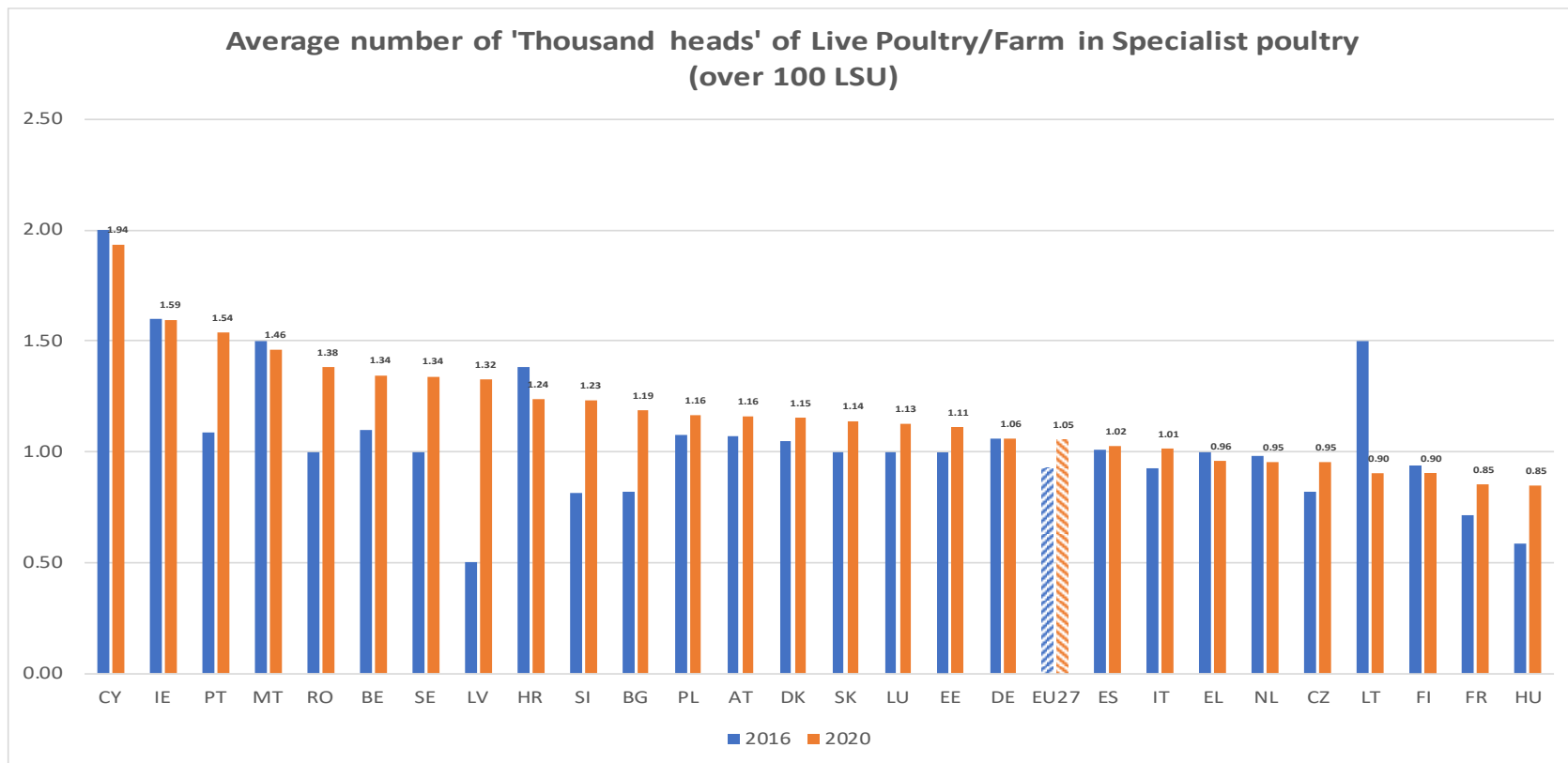


Expert Group for Agricultural Markets

20 June 2024

FARM STRUCTURE SURVEY

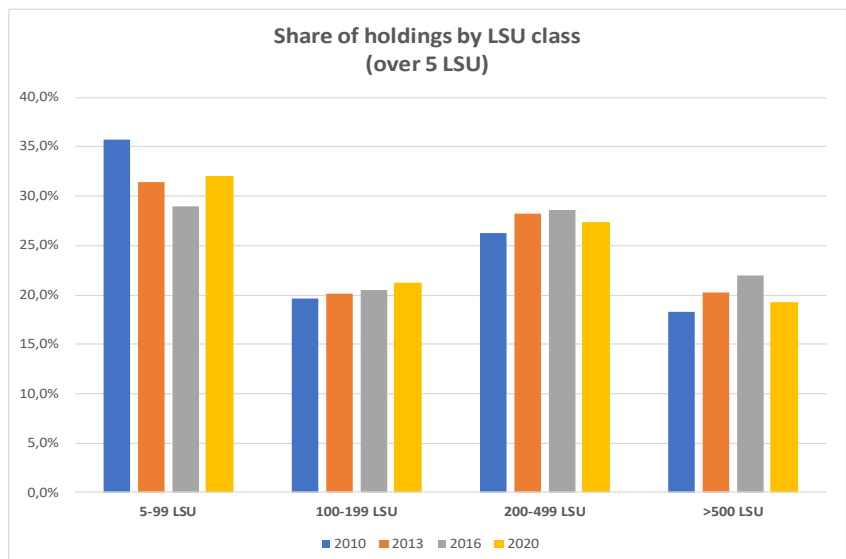
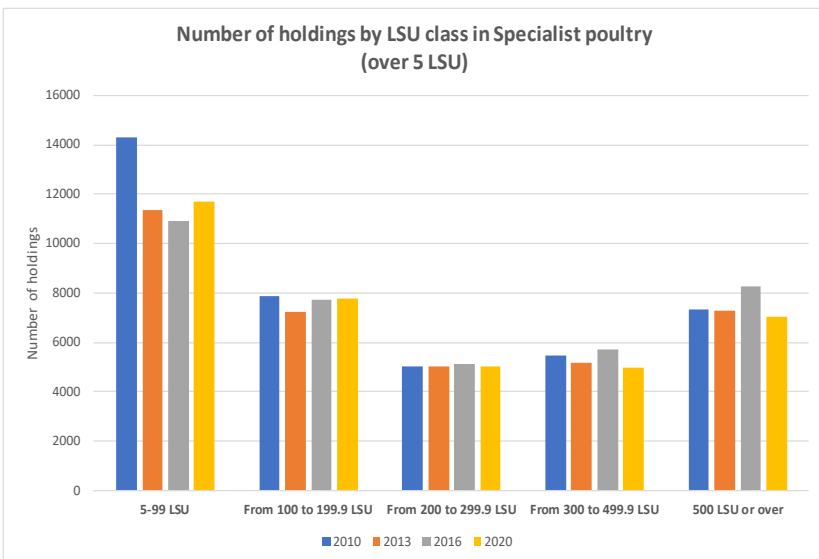
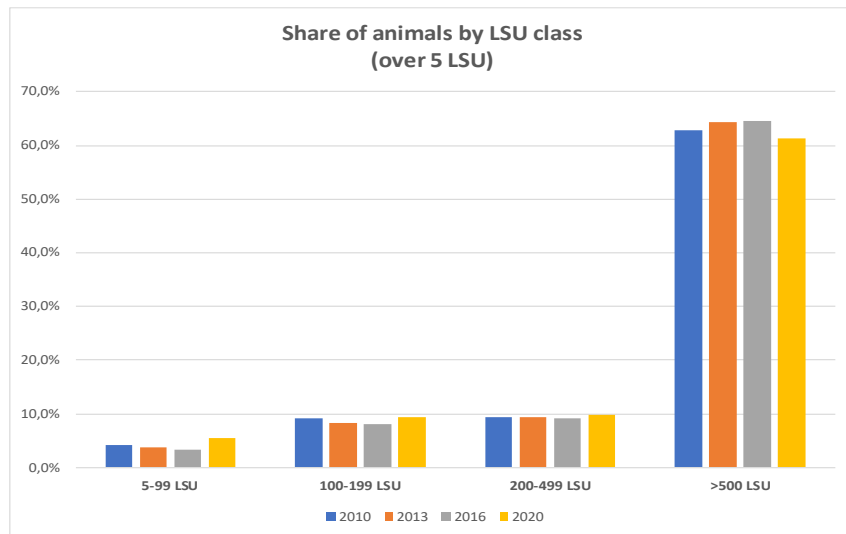
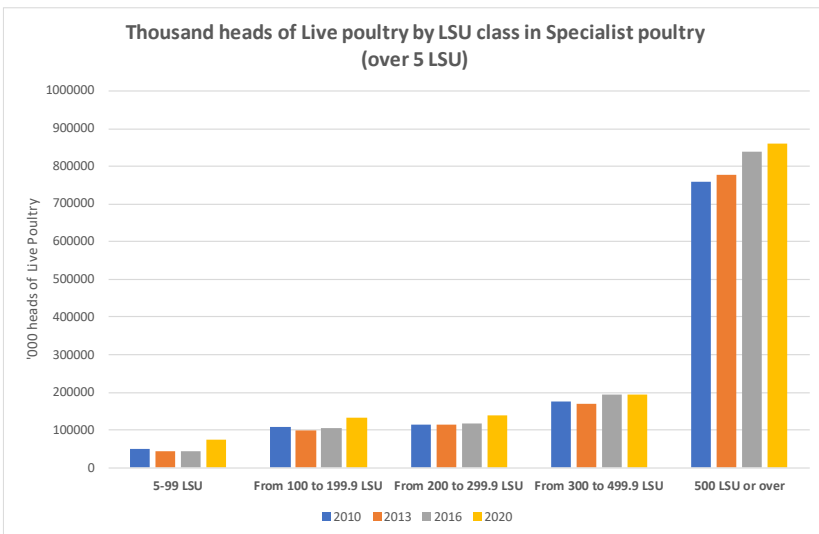
LSU for poultry:
 broiler- 0,007
 laying hen- 0,014
 turkey- 0,03
 duck- 0,01
 geese- 0,02



Specialist poultry - EU

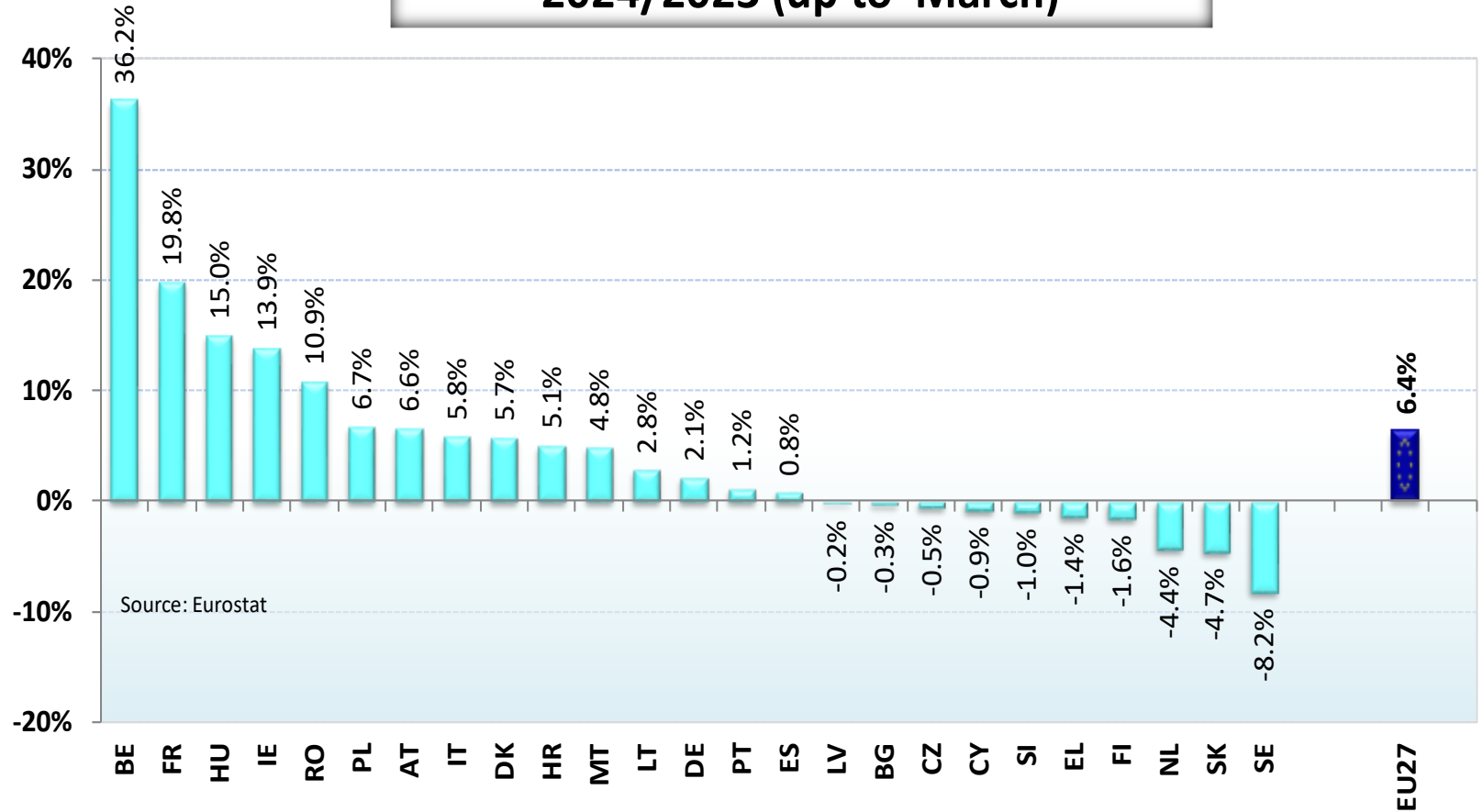
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-3.8% 2010)
- 1.322.590 Thousand heads in 2020

FARM STRUCTURE SURVEY



PRODUCTION

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



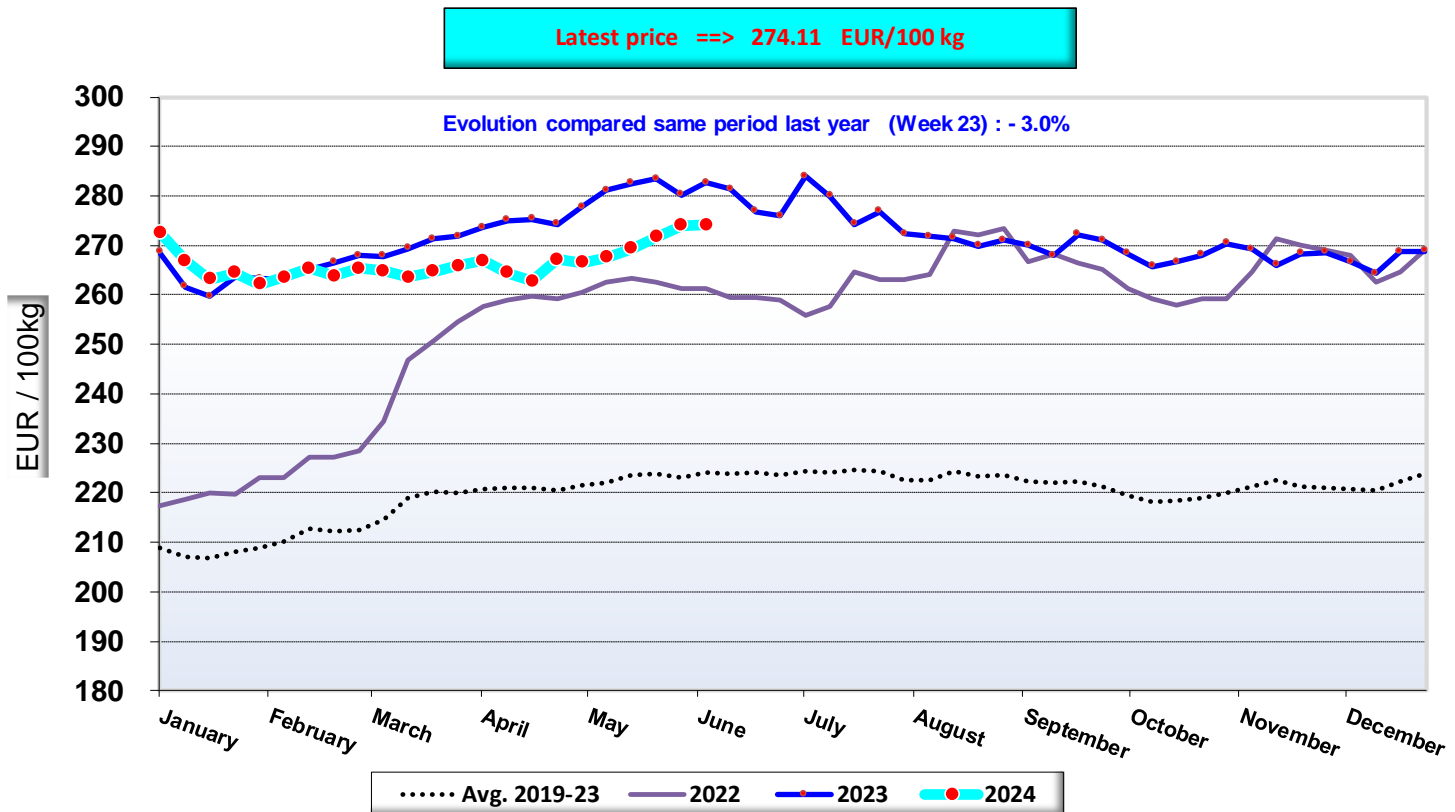
Source: Eurostat

20 June 2024

PRICES

EU EVOLUTION BROILER

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

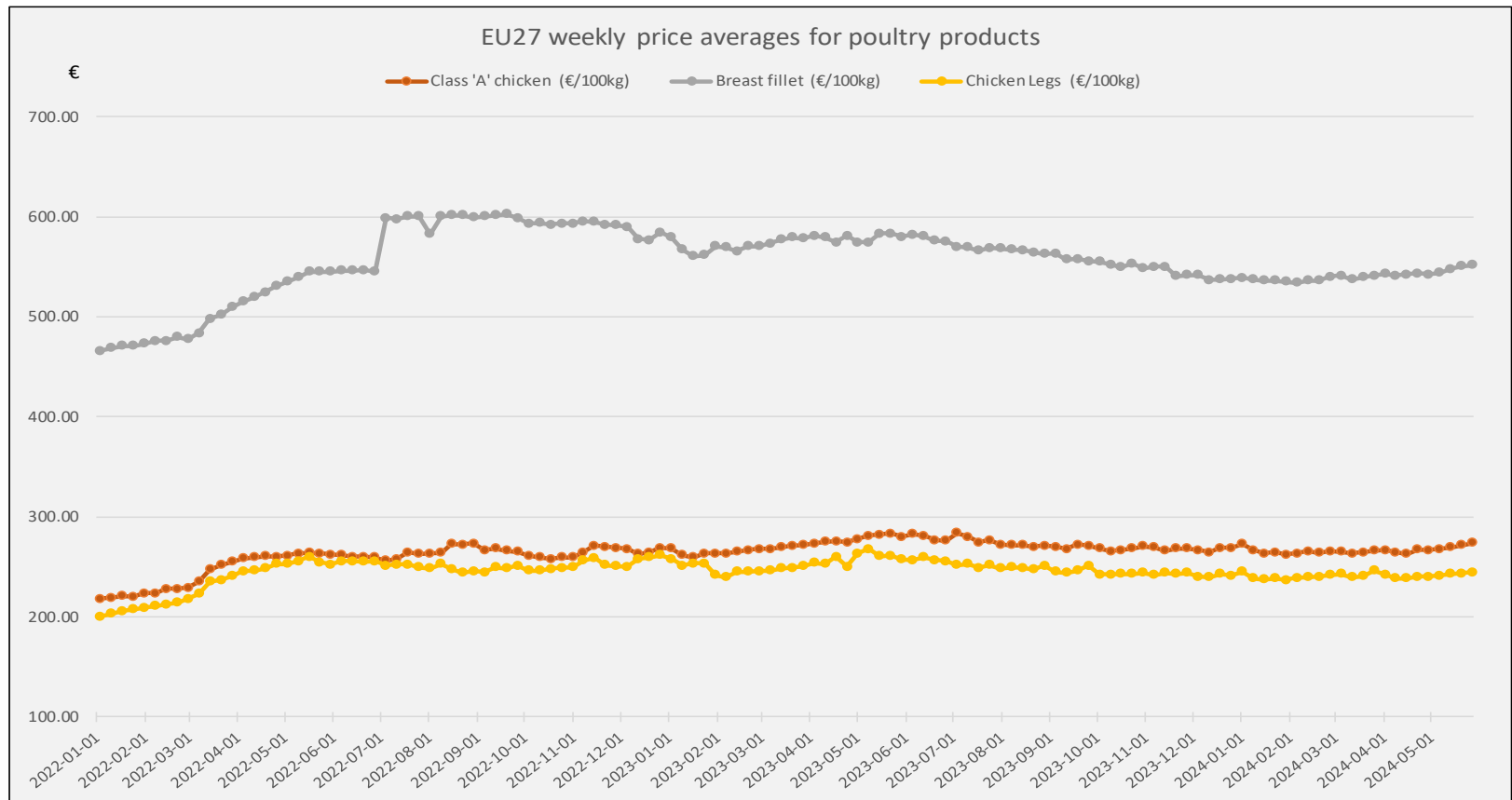


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

20 June 2024

Weekly prices of poultry products

Week - 22 EU27 weekly price averages for poultry products

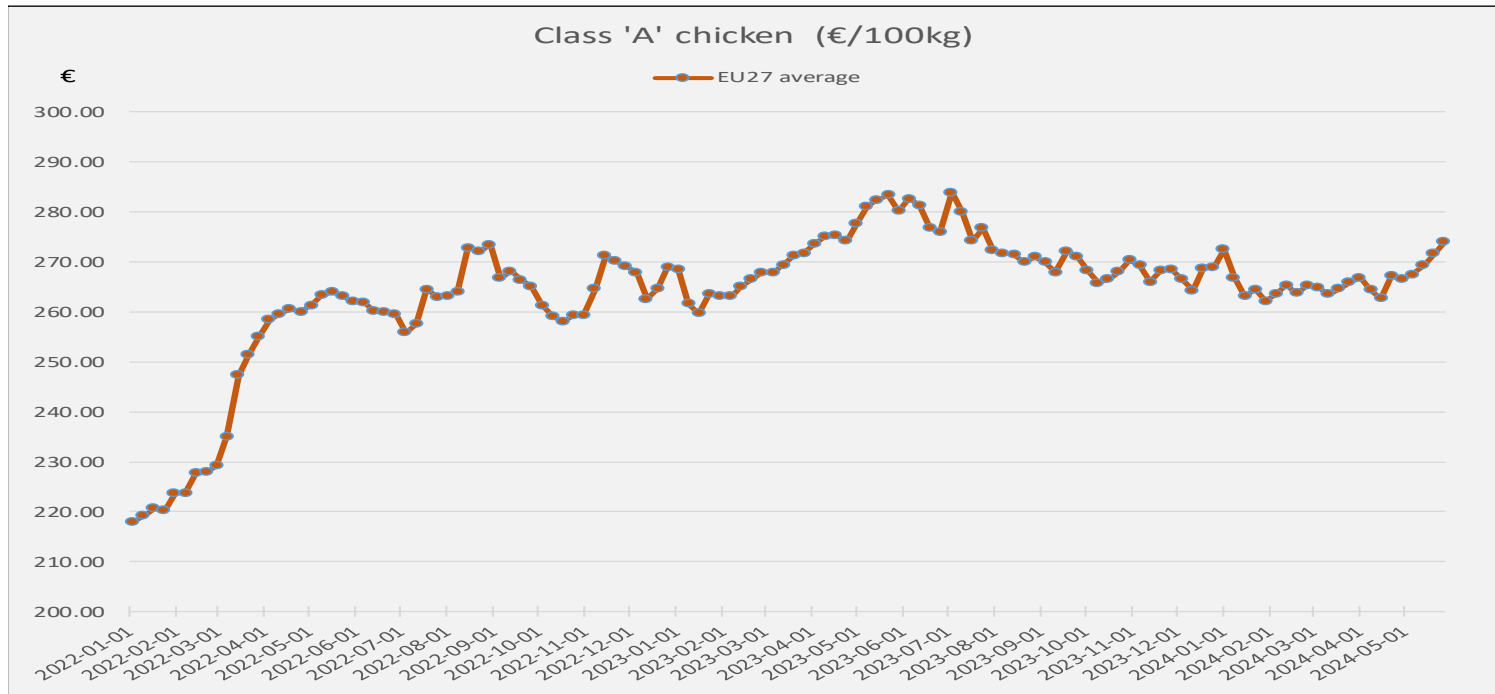


Week - 22	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	274.03	551.99	244.70

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

Weekly price of 'Class A Chicken'

Week - 22 Class 'A' chicken



Week - 22	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	274.03	+ 0.9%	+ 2.8%	- 2.2%

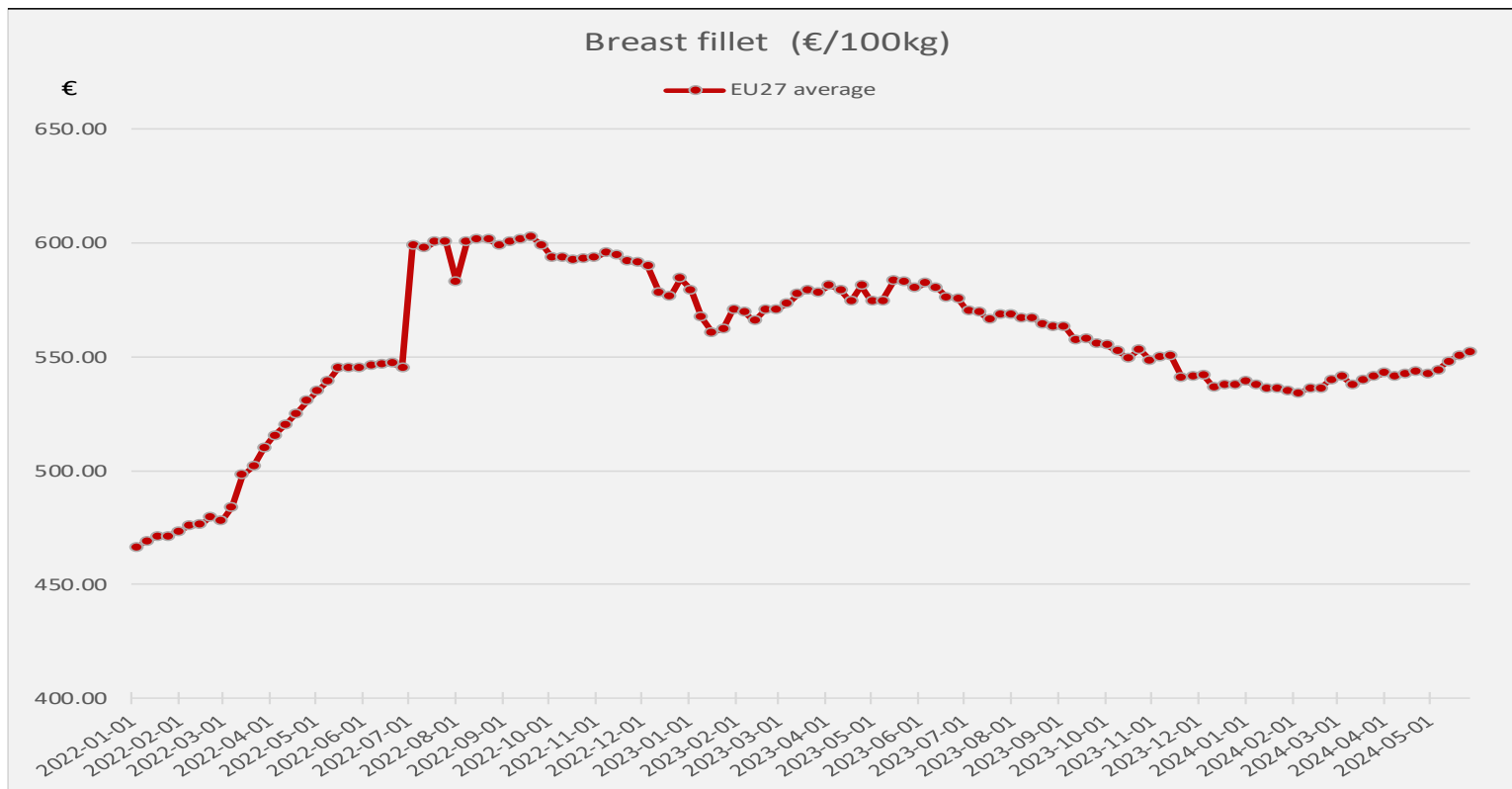
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

20 June 2024

Weekly price of 'Breast fillet'

Week - 22 Breast fillet



Week - 22	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	551.99	+ 0.3%	+ 1.8%	- 4.9%

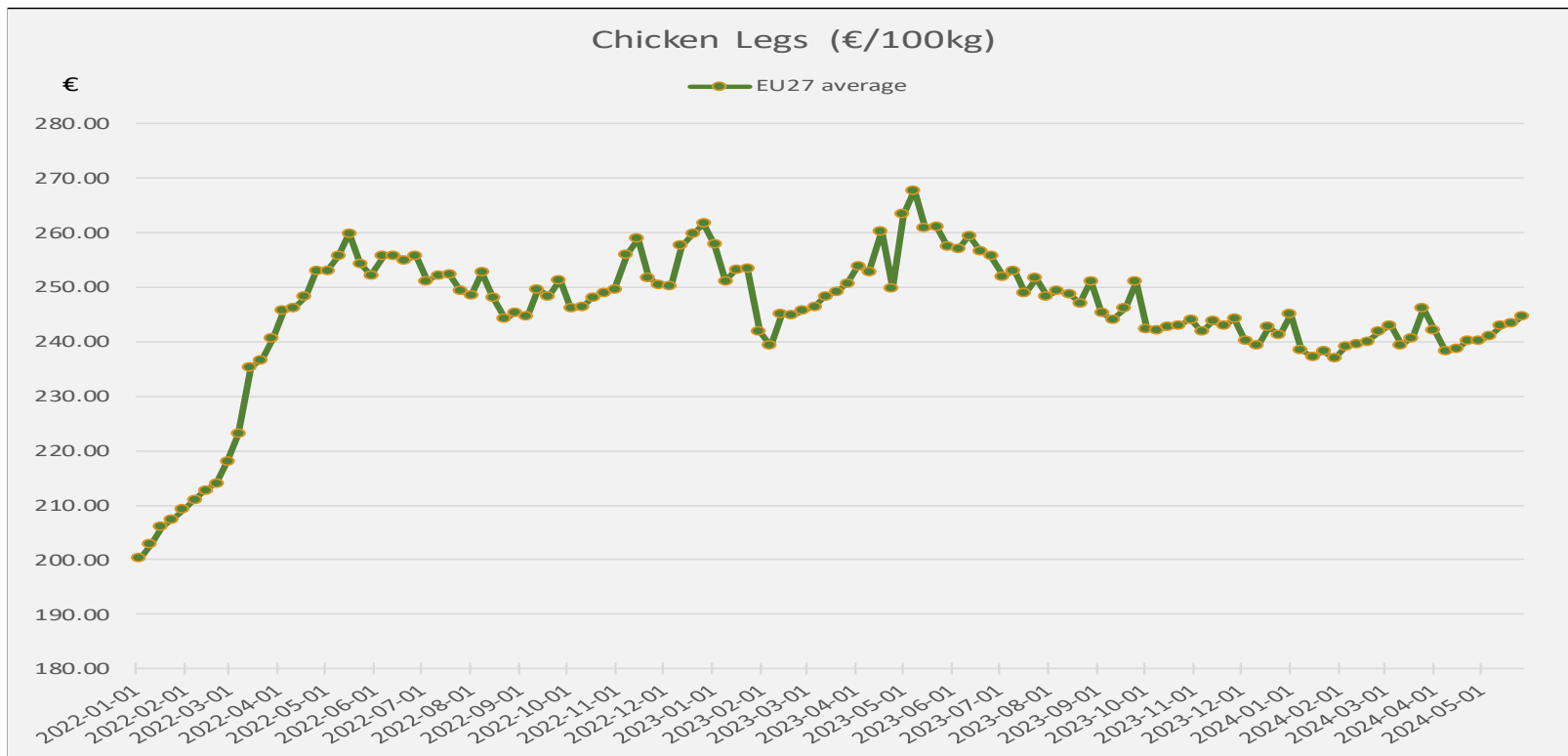
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

20 June 2024

Weekly price of 'Chicken legs'

Week - 22 Chicken Legs

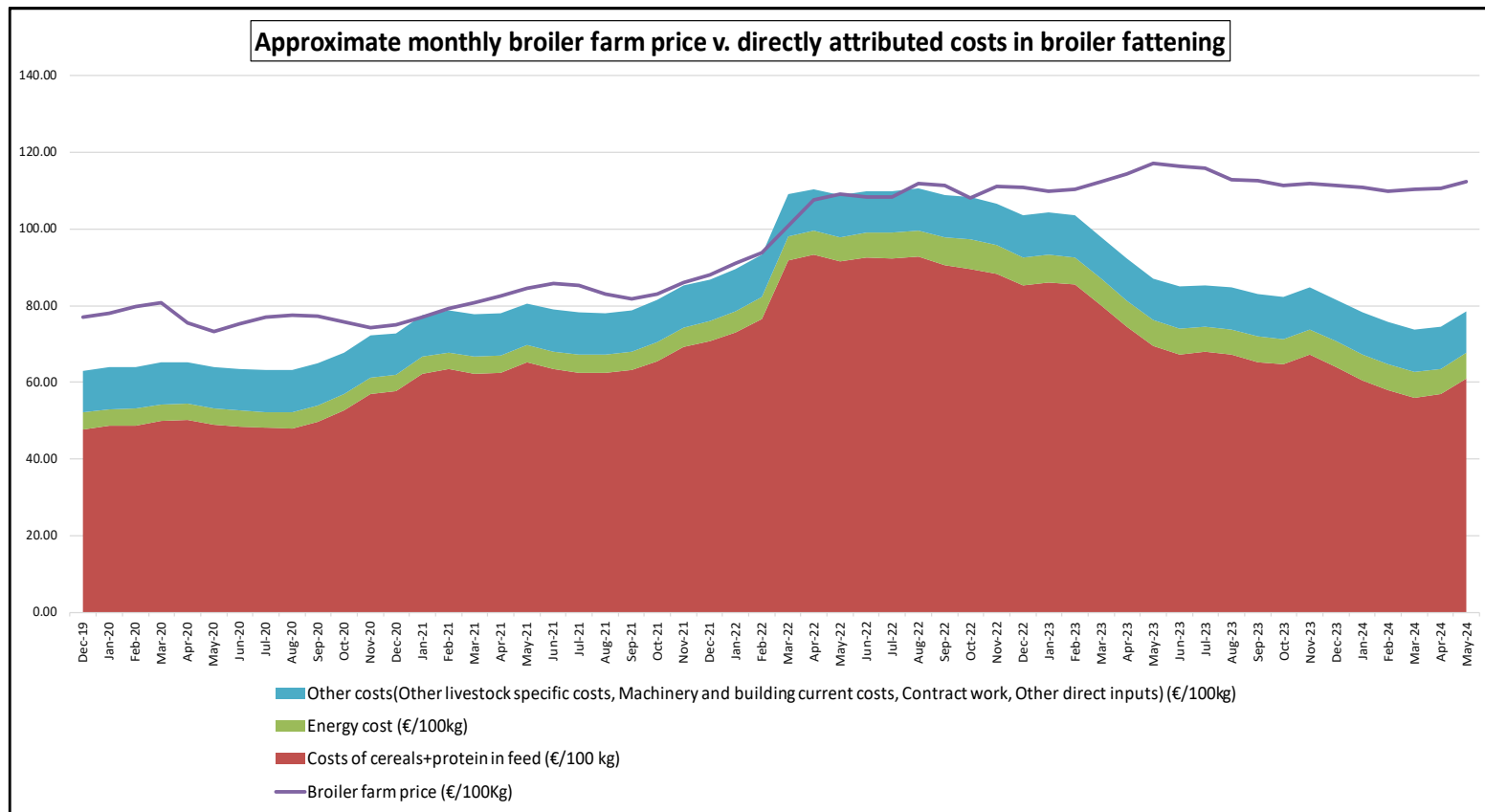


Week - 22	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	244.70	+ 0.6%	+ 1.9%	- 5.0%

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

20 June 2024

COST BROILER PRODUCTION

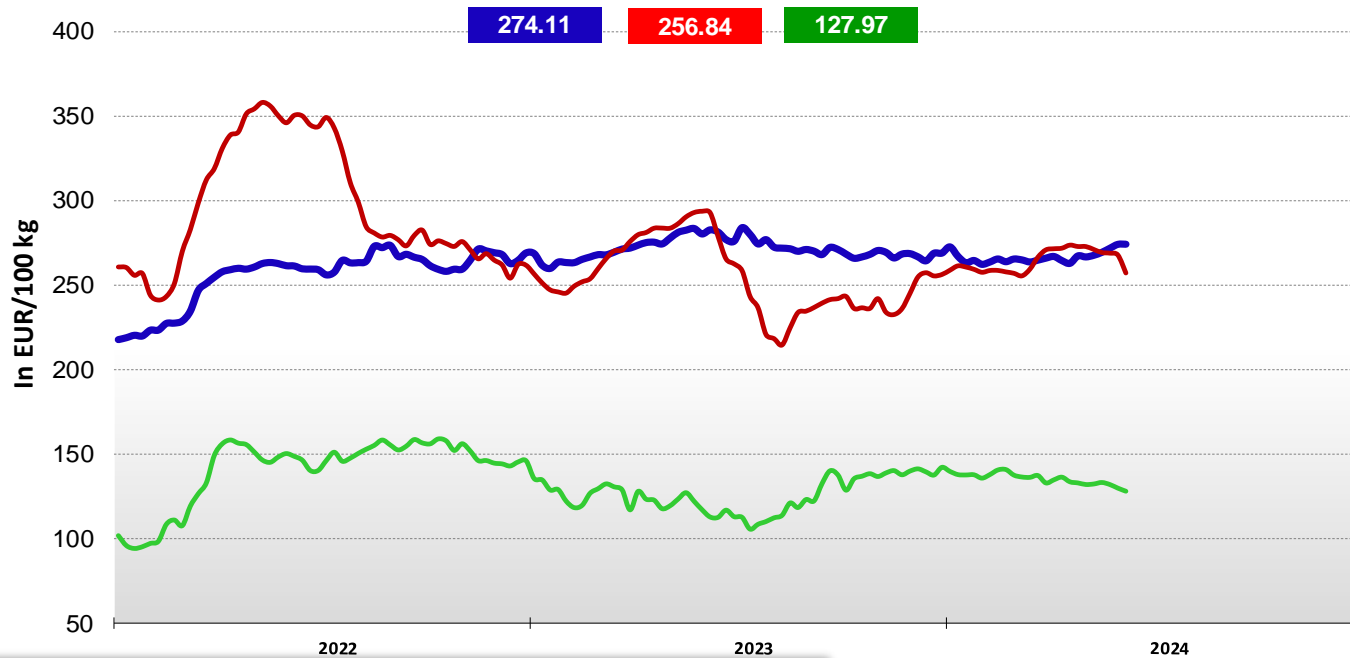


Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

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

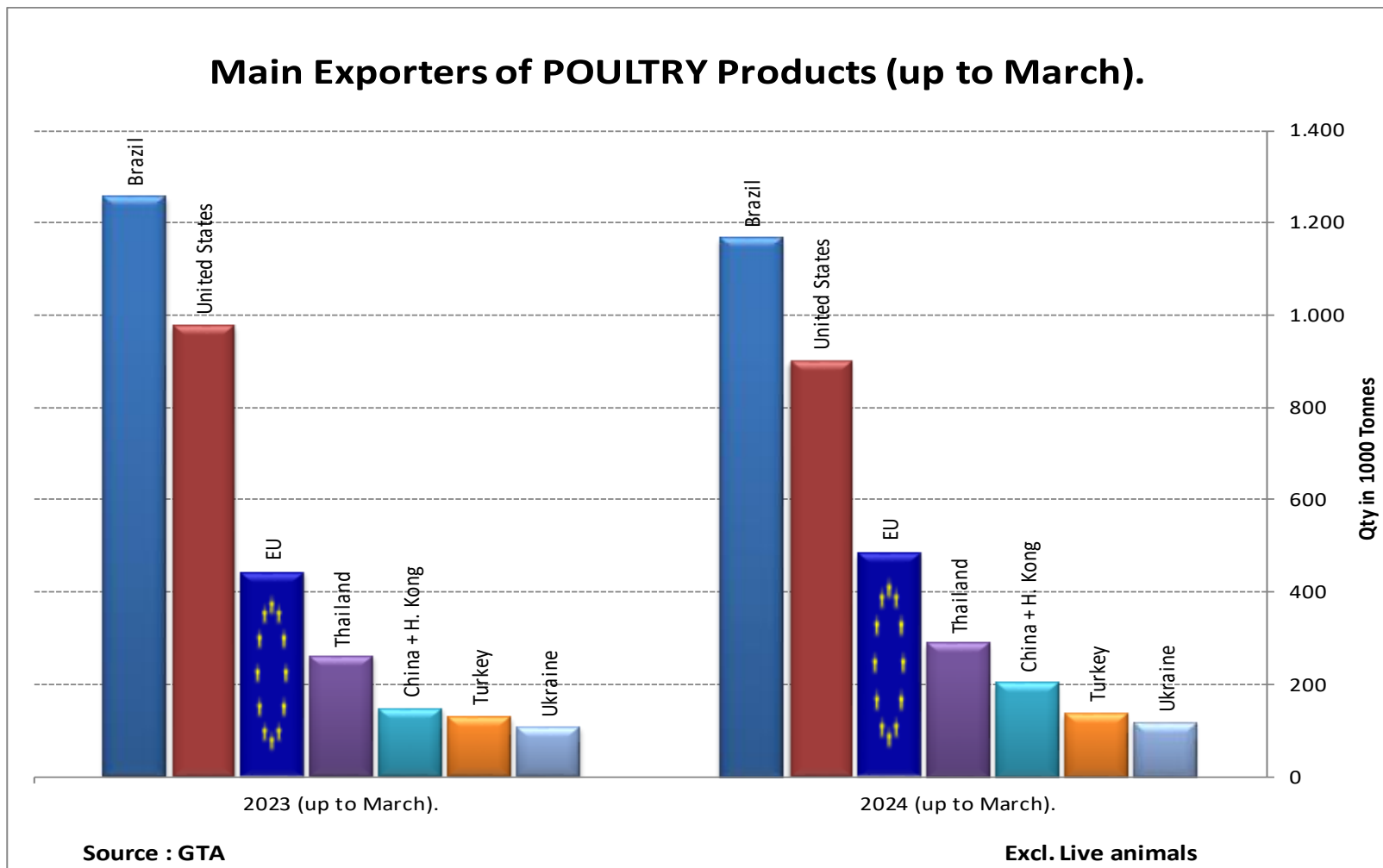
Broiler prices in EU, USA and Brazil



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

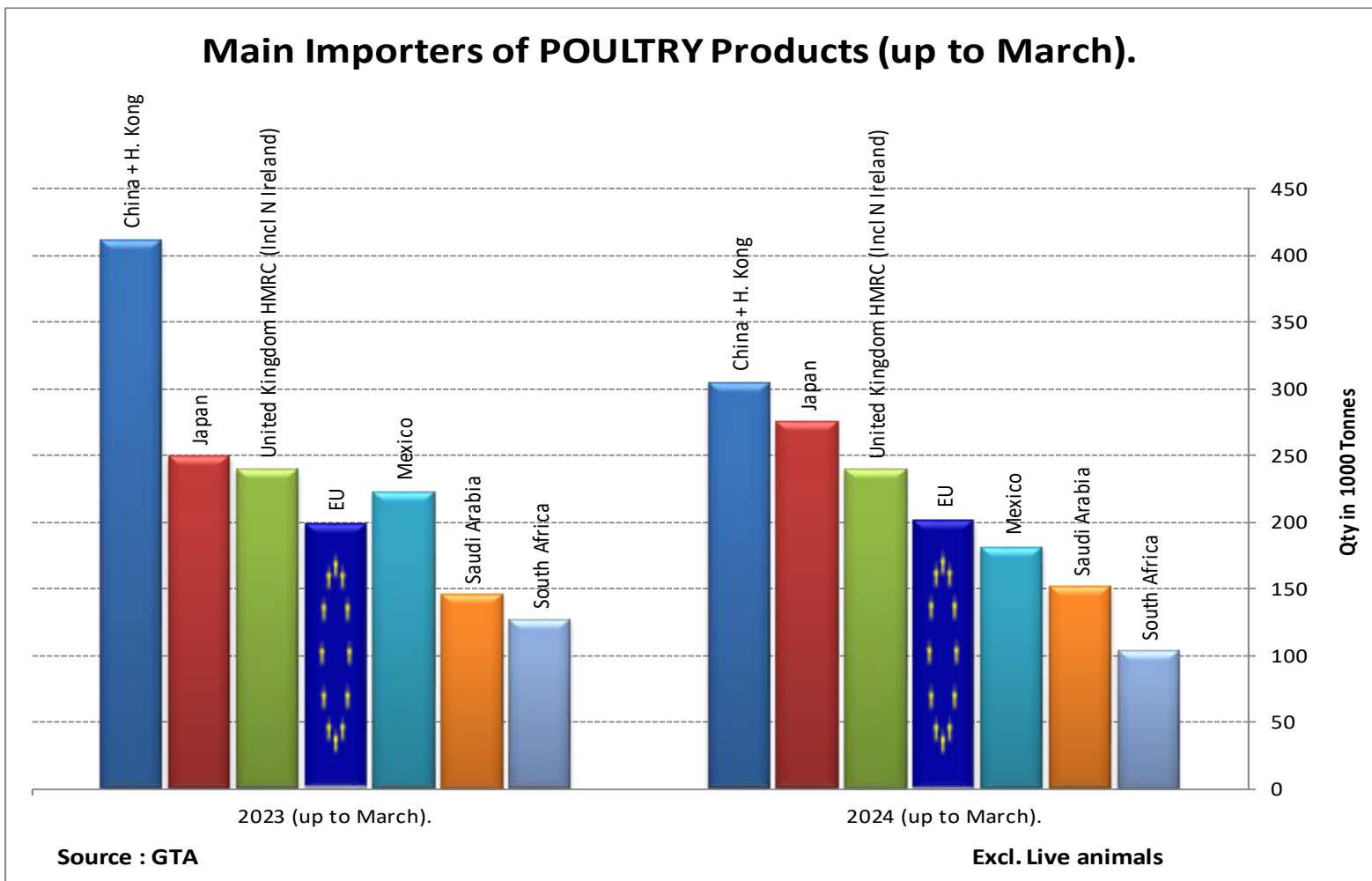
— EU — US — BR

Main Exporters of POULTRY Products (up to March).



20 June 2024

Main Importers of POULTRY Products (up to March).



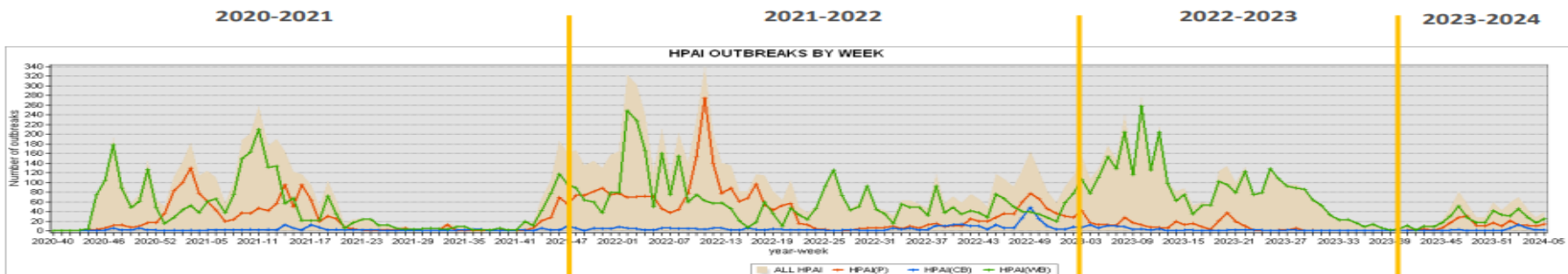
20 June 2024

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-Mar 24		Compared to Jan-Mar 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811,675	32%	725,611	32%	732,508	36%	718,430	37%	181,853	35.3%	+ 1.4%
Ghana	213,838	8%	228,066	10%	156,456	8%	148,745	8%	32,034	6.2%	- 15.8%
Congo (Dem. Rep.)	101,987	4%	139,852	6%	125,421	6%	101,032	5%	28,130	5.5%	+ 71.8%
Vietnam	50,977	2%	31,784	1%	29,751	1%	54,214	3%	20,012	3.9%	+ 139.0%
Saudi Arabia	74,407	3%	58,457	3%	74,590	4%	66,759	3%	18,021	3.5%	+ 9.7%
Ukraine	145,871	6%	162,267	7%	105,810	5%	84,641	4%	16,255	3.2%	- 32.0%
Congo	28,551	1%	30,303	1%	35,562	2%	46,994	2%	14,307	2.8%	+ 94.9%
Cuba	55,039	2%	11,056	0%	38,874	2%	30,534	2%	11,609	2.3%	+ 32.0%
Philippines	195,884	8%	81,155	4%	6,421	0%	4,270	0%	10,024	1.9%	+ 9529.7%
Liberia	27,930	1%	32,328	1%	33,782	2%	20,251	1%	9,604	1.9%	+ 132.9%
<i>Other Destinations</i>	814,592	32%	751,495	33%	691,059	34%	683,077	35%	173,712	33.7%	
Extra-EU	2,520,753		2,252,374		2,030,235		1,958,948		515,562		
% change			- 11%		- 10%		- 4%		+ 10.6%		

20 June 2024

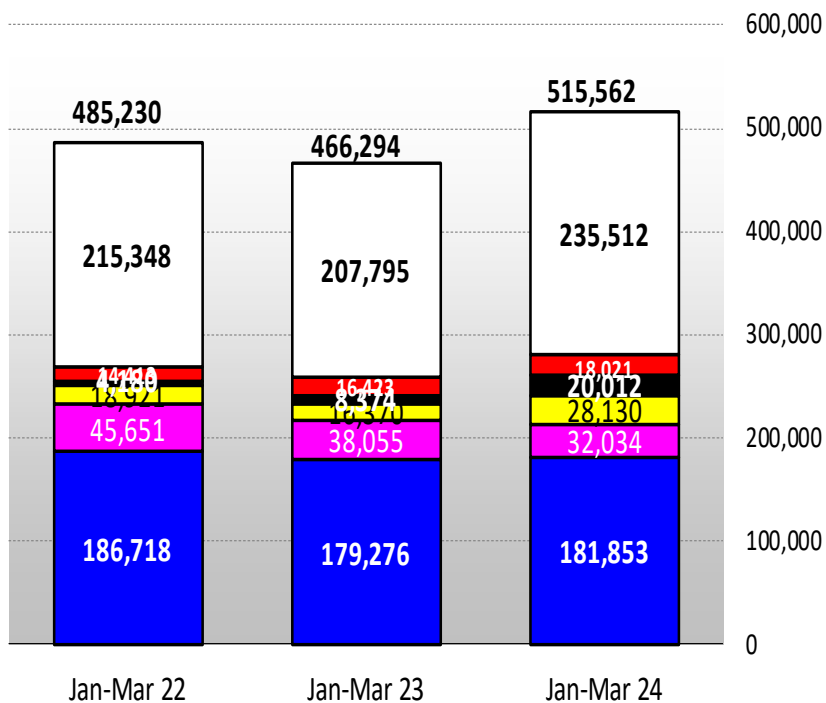
EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan-Mar 24		Compared to Jan-Mar 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%	2,584,744	66%	622,402	15.9%	- 4.5%
Ghana	172,363	4%	224,103	6%	167,715	4%	156,219	4%	32,393	0.8%	- 20.5%
Congo (Dem. Rep.)	81,033	2%	116,553	3%	145,766	4%	112,070	3%	28,785	0.7%	+ 42.7%
Vietnam	55,251	1%	35,592	1%	39,533	1%	67,637	2%	23,617	0.6%	+ 130.5%
Saudi Arabia	104,518	3%	93,283	2%	159,672	4%	128,774	3%	38,408	1.0%	+ 30.6%
Ukraine	100,109	3%	119,533	3%	102,729	3%	125,704	3%	25,918	0.7%	- 36.6%
Congo	23,311	1%	26,636	1%	36,276	1%	42,993	1%	12,779	0.3%	+ 77.0%
Cuba	48,465	1%	12,697	0%	38,523	1%	28,467	1%	14,721	0.4%	+ 72.4%
Philippines	86,502	2%	57,220	1%	7,793	0%	6,538	0%	6,133	0.2%	+ 1444.9%
Liberia	13,241	0%	20,672	1%	27,101	1%	20,227	1%	9,191	0.2%	+ 91.8%
<i>Other Destinations</i>	1,253,335	32%	1,256,391	32%	1,358,637	35%	1,462,326	37%	349,308	8.9%	
Extra-EU	3,920,057		3,972,355		4,736,138		4,735,700		1,163,656		
% change			+ 1%		+ 19%		- 0%		+ 0.9%		

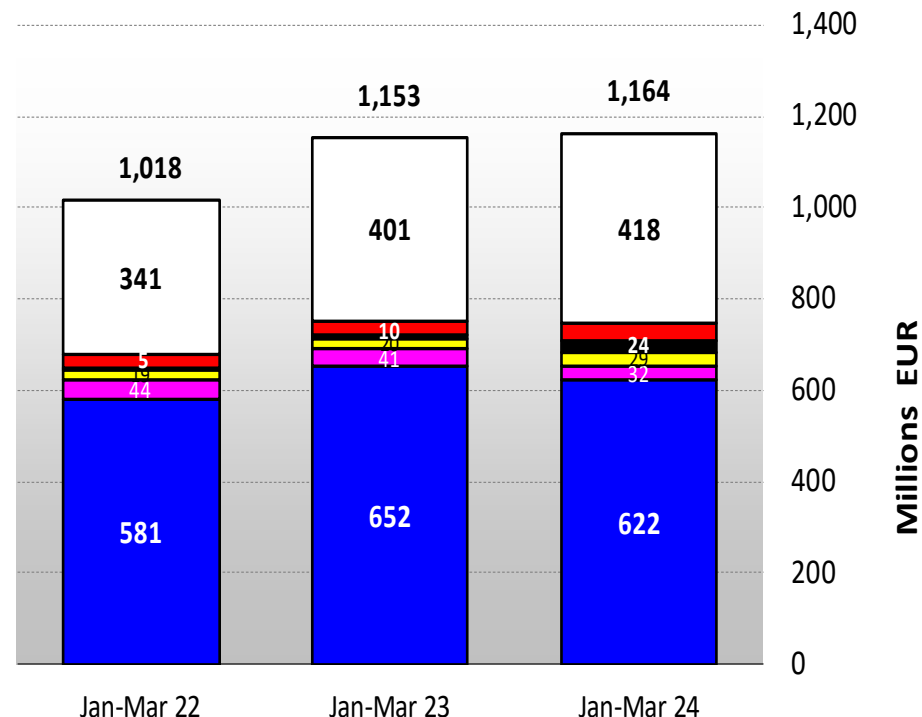
20 June 2024

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 26 ('Millions EUR)

20 June 2024

EU-27 Imports of poultry meat from selected origins

In tons of carcass weight

	2020		2021		2022		2023		Jan-Mar 24		Compared to Jan-Mar 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227,738	28%	251,887	32%	301,239	35%	290,184	32%	67,982	30.2%	- 10.7%
Ukraine	108,669	14%	102,892	13%	162,837	19%	231,777	26%	55,603	24.7%	- 12.5%
United Kingdom	293,914	37%	274,667	34%	210,851	25%	170,214	19%	45,938	20.4%	+ 50.6%
Thailand	131,374	16%	130,658	16%	131,223	15%	148,602	17%	39,982	17.8%	- 3.9%
China	17,017	2%	20,916	3%	32,864	4%	36,467	4%	10,414	4.6%	+ 8.7%
Chile	14,382	2%	2,441	0%	466	0%	3,238	0%	1,748	0.8%	+ 92.6%
Argentina	3,273	0%	3,151	0%	4,096	0%	4,086	0%	1,094	0.5%	+ 40.1%
Other Destinations	8,404	1%	10,445	1%	11,076	1%	10,200	1%	1,980	0.9%	
Extra-EU	804,772		797,056		854,651		894,768		224,741		
% change			- 1%		+ 7%		+ 5%		- 0.4%		

20 June 2024

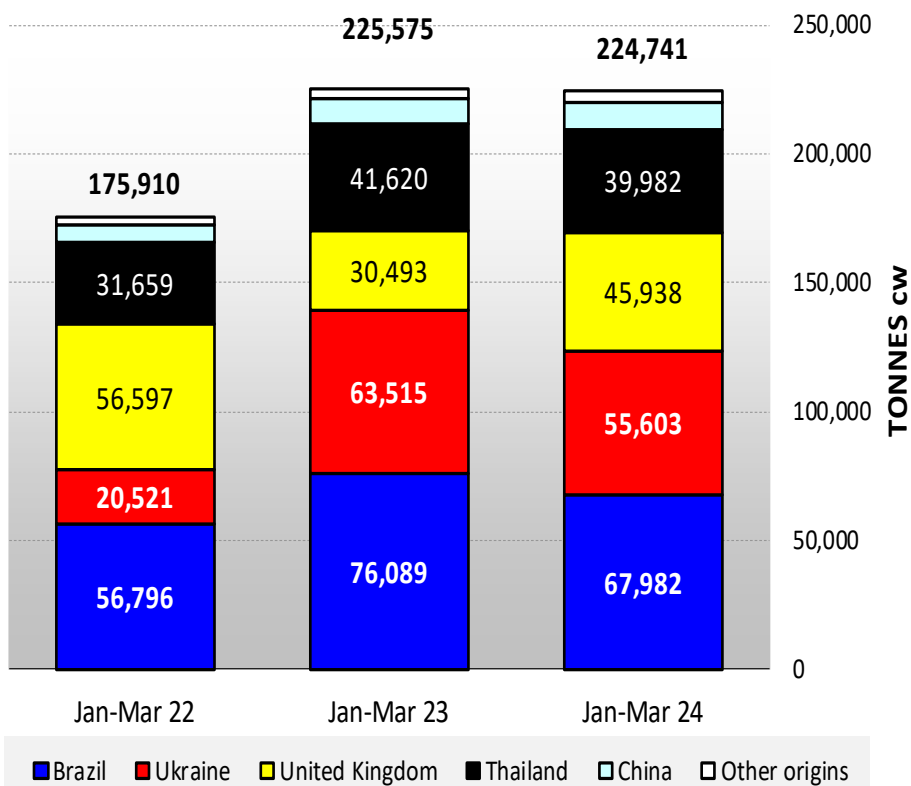
EU-27 Imports of poultry meat from selected origins

	2020		2021		2022		2023		Jan-Mar 24		Compared to Jan-Mar 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351,277	24%	388,472	29%	669,772	31%	598,053	28%	133,161	26.1%	- 13.9%
Ukraine	132,740	9%	166,208	12%	324,836	15%	417,899	20%	101,507	19.9%	- 8.0%
United Kingdom	501,768	34%	327,273	24%	368,062	17%	352,937	17%	93,721	18.4%	+ 34.6%
Thailand	316,860	22%	317,487	24%	519,225	24%	489,751	23%	116,867	22.9%	- 24.1%
China	78,298	5%	95,081	7%	186,175	9%	182,651	9%	48,409	9.5%	- 4.7%
Chile	35,557	2%	6,019	0%	1,537	0%	7,325	0%	3,764	0.7%	+ 57.0%
Argentina	6,515	0%	6,508	0%	11,463	1%	11,396	1%	2,631	0.5%	+ 10.5%
Norway	5,280	0%	7,914	1%	8,286	0%	8,872	0%	2,068	0.4%	- 7.0%
Bosnia-Herz.	7,809	1%	10,345	1%	10,728	1%	9,362	0%	2,322	0.5%	- 8.2%
Switzerland	6,229	0%	5,300	0%	8,975	0%	6,730	0%	1,559	0.3%	- 3.6%
<i>Other Destinations</i>	16,429	1%	15,466	1%	18,949	1%	19,805	1%	3,792	0.7%	
Extra-EU	1,458,760		1,346,074		2,128,008		2,104,781		509,801		
% change			- 8%		+ 58%		- 1%		- 8.4%		

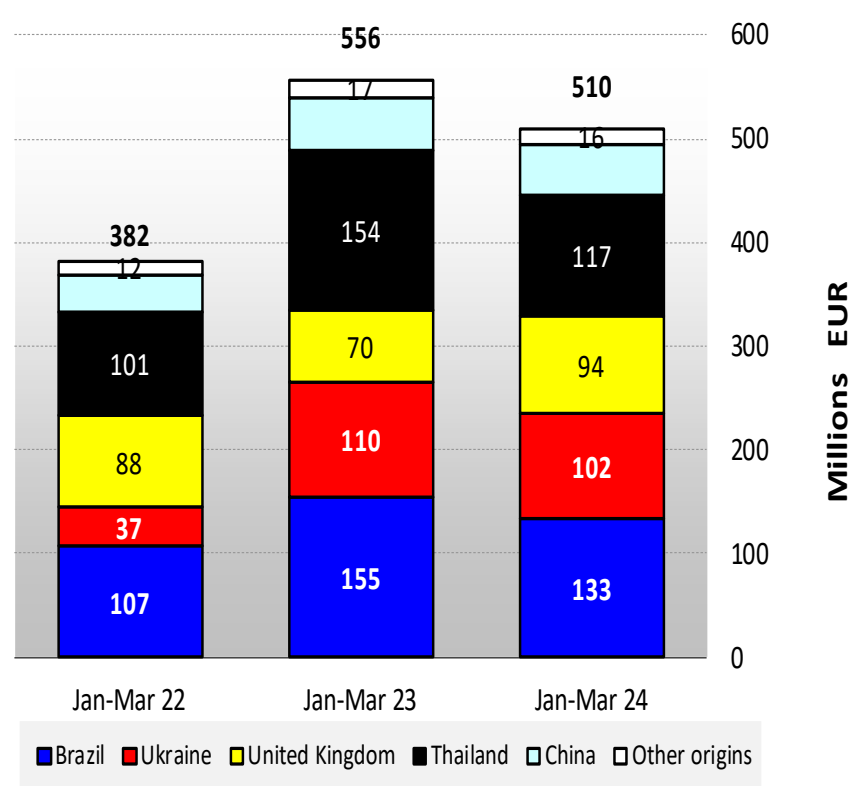
20 June 2024

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

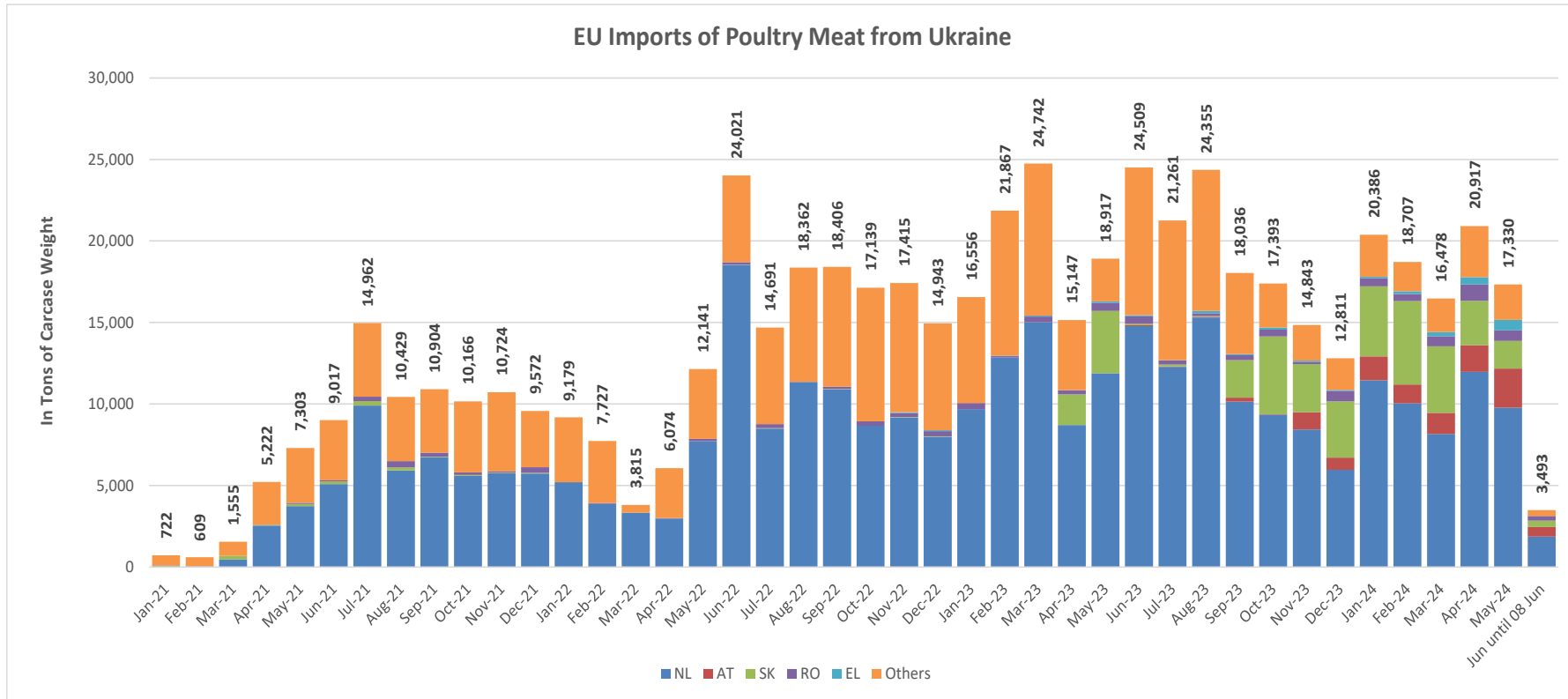


EU IMPORTS of Poultry Meat (Millions EUR)



20 June 2024

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.

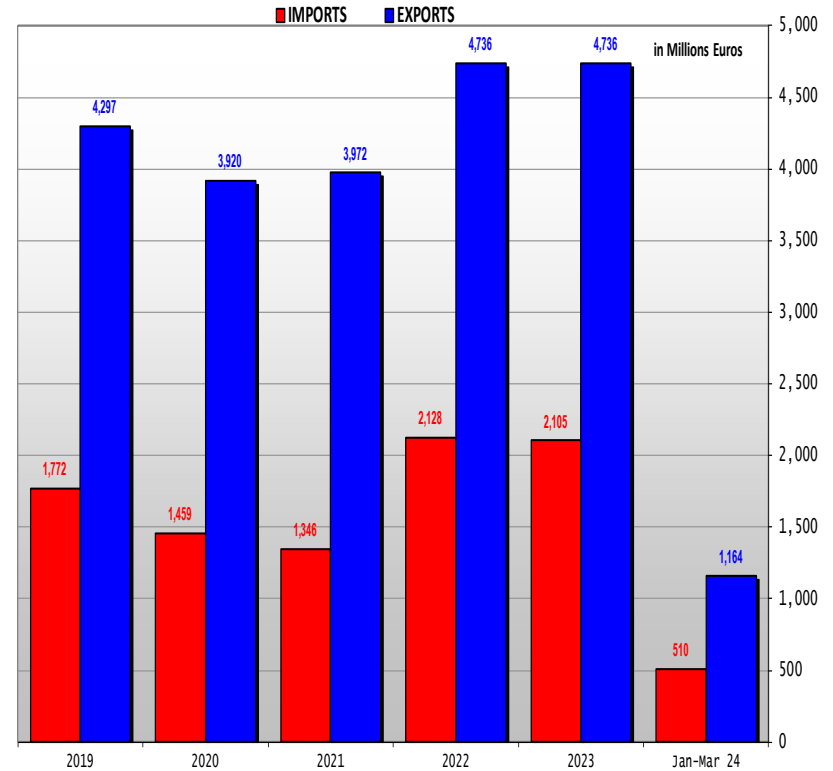
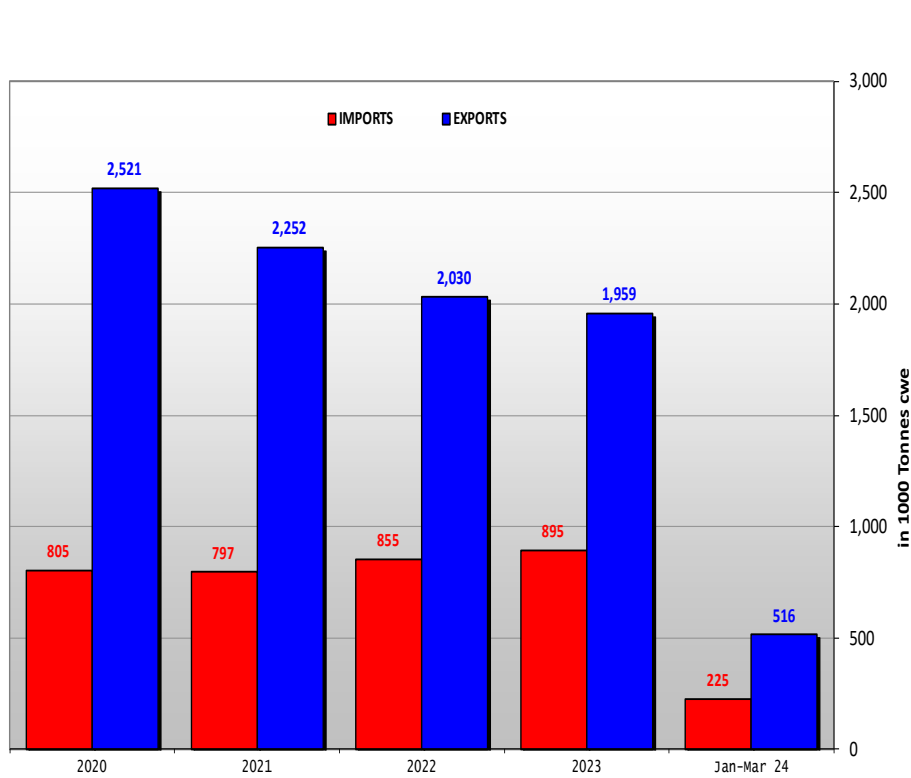
20 June 2024

TRADE

BALANCE

in 1000 tons cwe

in million EUR



20 June 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>



© European Union 2020

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.

20 June 2024