

EU Market Situation for Poultry



Expert Group for Agricultural Markets

23 January 2025

FORECAST

EU production of poultry					
	Qty in Tonnes		% change		
Source : Eurostat, forecast 2024 by MS					
	2022	2023	%2023/2022	trend 2024/2023	
PL	2,729,890	2,746,040	0.6	↗	↗
ES	1,638,640	1,718,430	4.9	↗	↗
DE	1,543,000	1,563,000	1.3	↑	↑
FR	1,503,580	1,533,410	2.0	↑	↑
IT	1,213,160	1,334,140	10.0	↗	↗
NL	863,970	849,620	-1.7	↘	↘
HU	479,880	514,810	7.3	→	→
RO	491,220	510,690	4.0	↗	↗
BE	449,040	428,200	-4.6	↑	↑
PT	370,980	380,740	2.6	↗	↗
EL	248,770	273,890	10.1	↑	↑
SE	176,120	175,860	-0.1	↘	↘
CZ	169,970	167,690	-1.3	↑	↑
IE	170,940	167,650	-1.9	↑	↑
DK	151,920	159,200	4.8	↗	↗
AT	143,580	150,470	4.8	↑	↑
FI	147,130	143,580	-2.4	↗	↗
BG	119,530	120,890	1.1	↗	↗
LT	86,280	85,950	-0.4	↘	↘
SK	77,370	77,360	-0.0	↘	↘
SI	73,660	75,250	2.2	↗	↗
HR	71,620	72,090	0.7	↗	↗
LV	36,600	37,080	1.3	↗	↗
CY	27,260	27,770	1.9	↗	↗
MT	4,250	4,740	11.5	→	→
EE	0	0			
EU27	12,988,360	13,318,550	2.5		↗

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

FORECAST

EU production of broiler

Qty in Tonnes
Source : Eurostat, forecast 2024 by MS

	2022	2023	% 2023/2022	trend 2024/2023
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	↗
IT	993,950	1,083,180	9.0	↘
DE	1,076,000	1,083,000	0.7	↗
NL	863,970	849,620	-1.7	↘
RO	475,450	500,760	5.3	↗
BE	442,020	421,480	-4.6	↗
HU	348,840	378,980	8.6	→
PT	314,170	322,970	2.8	↗
EL	244,850	271,690	11.0	↗
SE	167,170	166,880	-0.2	↗
CZ	161,020	159,100	-1.2	↗
DK	151,730	159,030	4.8	↗
IE	144,730	137,010	-5.3	↗
FI	138,280	134,770	-2.5	↗
BG	90,580	90,540	-0.0	↗
LT	84,240	83,040	-1.4	↗
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	↗
MT	4,250	4,740	11.5	→
SK	c	c		
EE	c	c		
AT	c	c		
EU27	10,588,350	10,856,500	2.5	↗

EU production of turkey

Qty in Tonnes
Source : Eurostat, forecast 2024 by MS

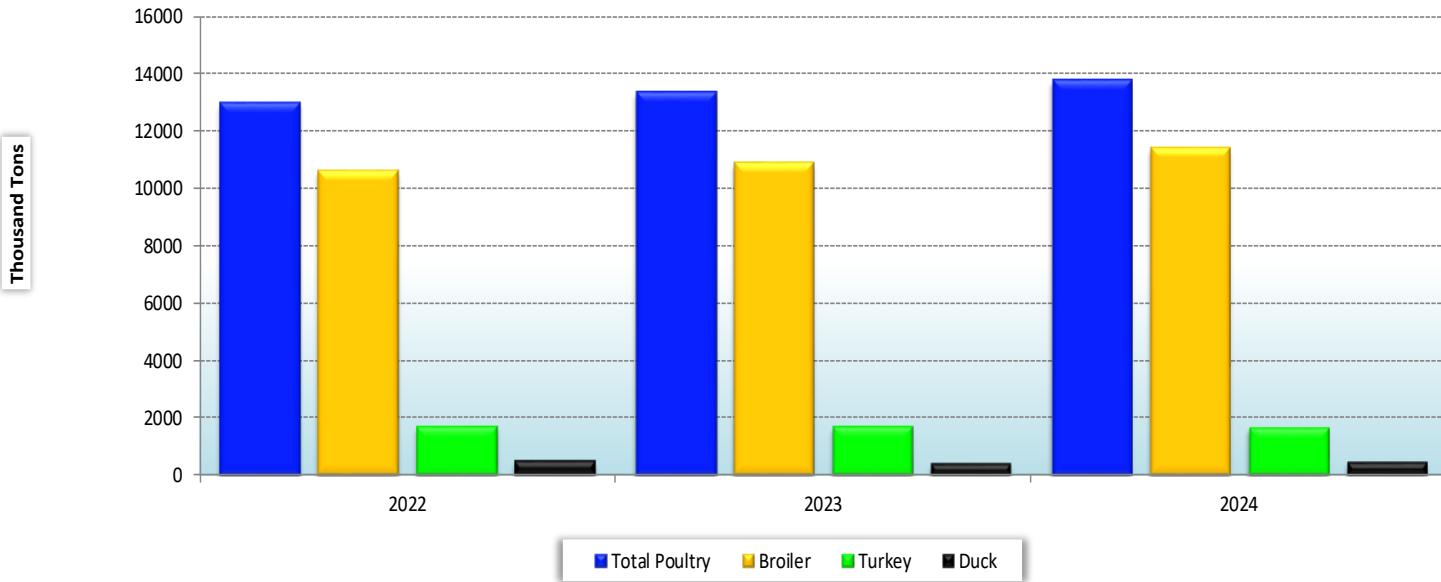
	2022	2023	%2023/2022	trend 2024/2023
DE	406,000	422,000	3.9	↘
PL	409,170	367,310	-10.2	↘
ES	231,590	248,030	7.1	↘
IT	211,130	242,750	15.0	↗
FR	244,920	240,230	-1.9	↗
HU	63,910	56,210	0.0	→
PT	45,650	44,590	-2.3	↗
IE	14,720	16,400	11.4	↗
FI	8,840	8,810	-0.3	↘
BE	0	6,570		↗
SI	5,220	5,590	7.1	↘
SE	4,690	4,680	-0.2	↗
EL	2,880	2,140	-25.7	↘
CZ	1,740	1,720	-1.1	↗
CY	150	90	0.0	→
LV	20	20	0.0	→
NL	0	10	0.0	→
DK	30	10	0.0	→
HR	0	0		
SK	0	0		
AT	0	0		
RO	0	0	0.0	→
LT				→
EE				
MT				
BG				→
EU27	1,650,660	1,667,160	1.0	↘

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FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT



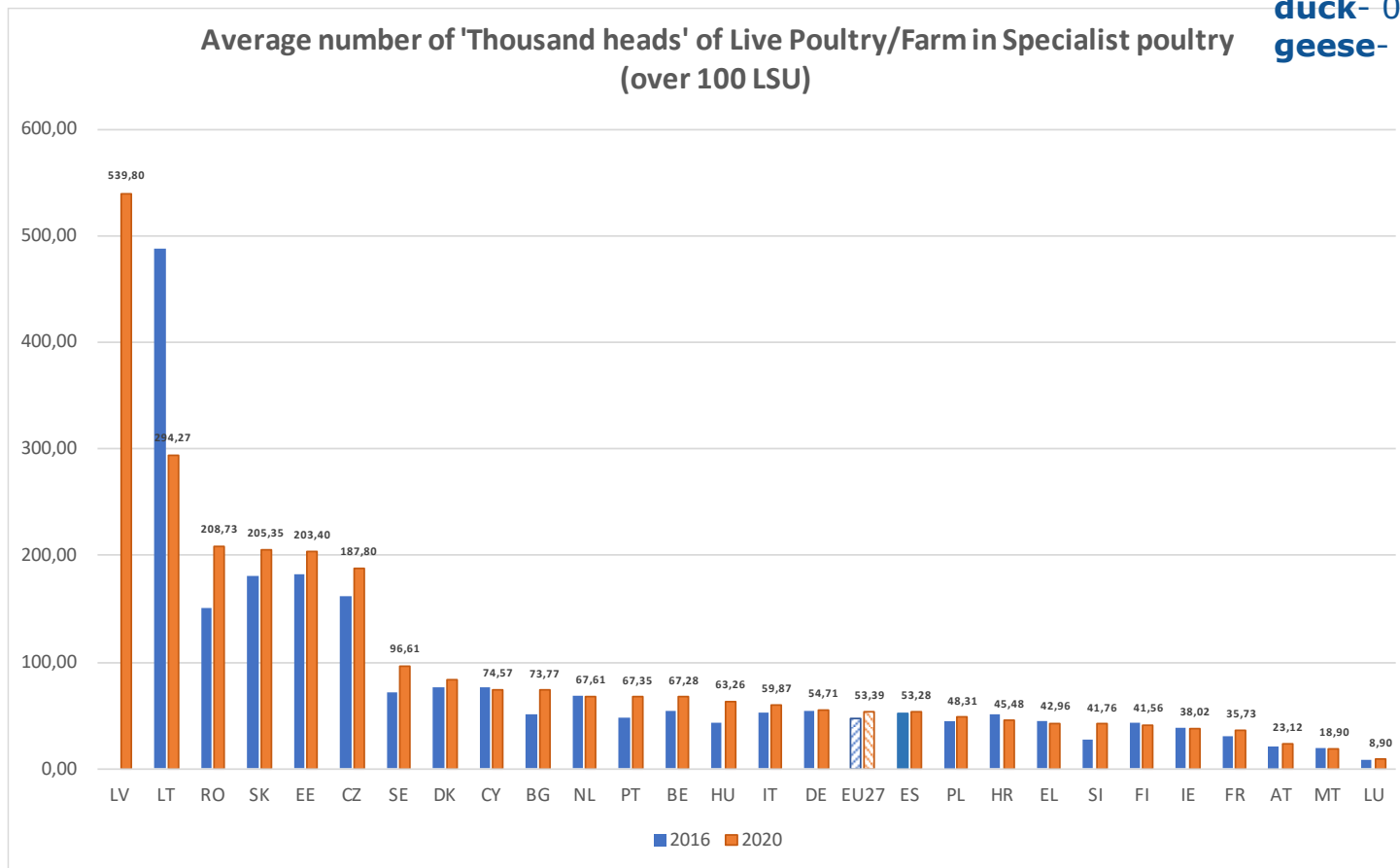
	2022	2023	2024	% 2023/2022	% 2024/2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* Source: Eurostat, forecast 2024 by MS

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FARM STRUCTURE SURVEY

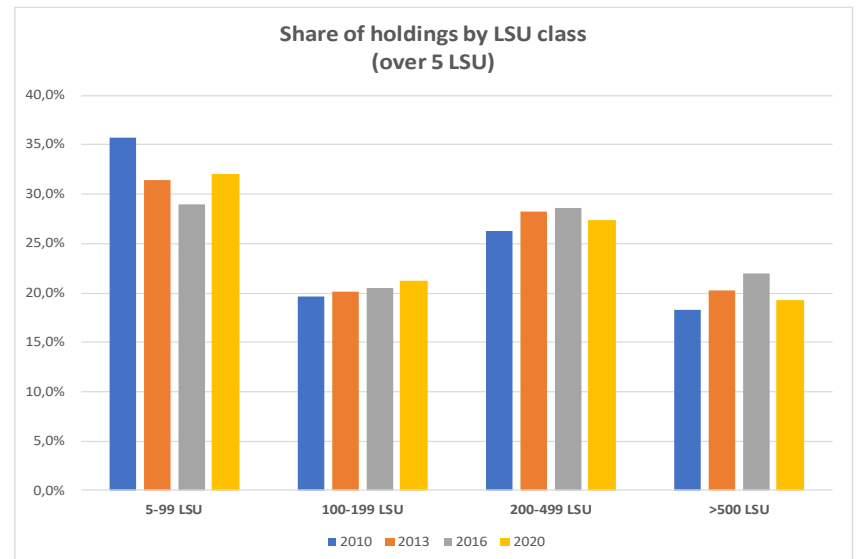
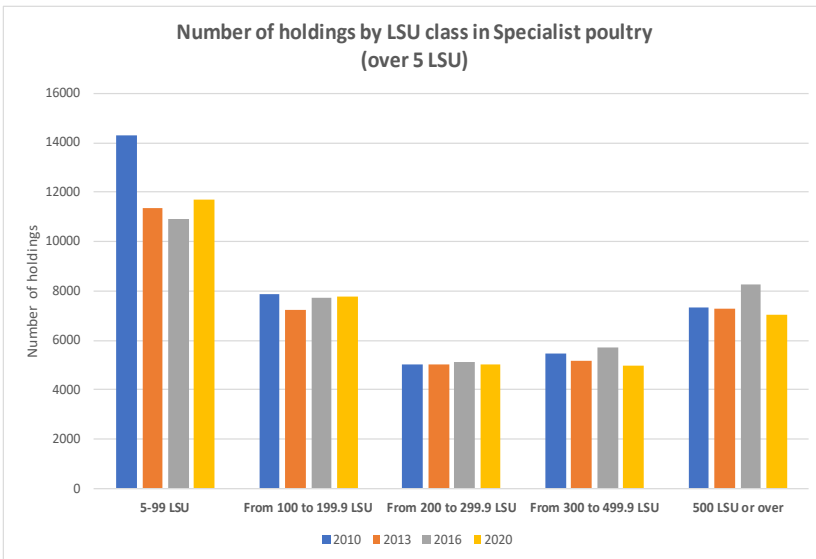
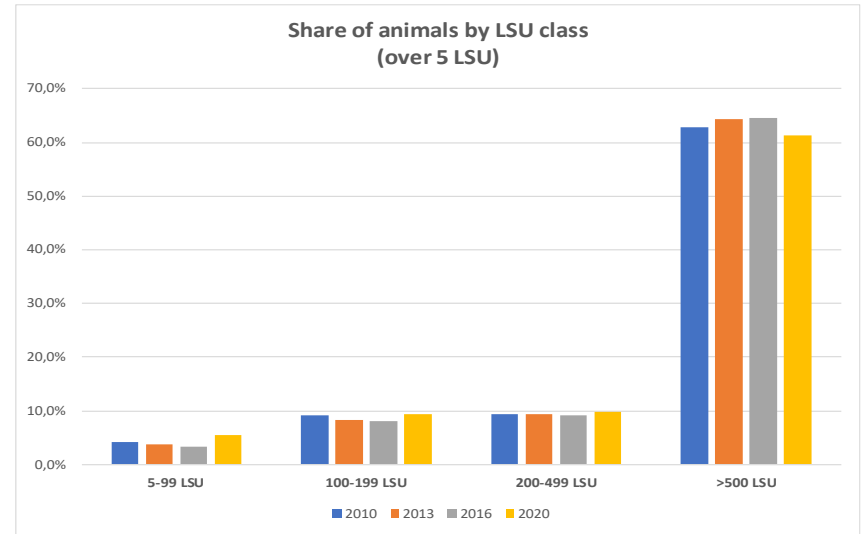
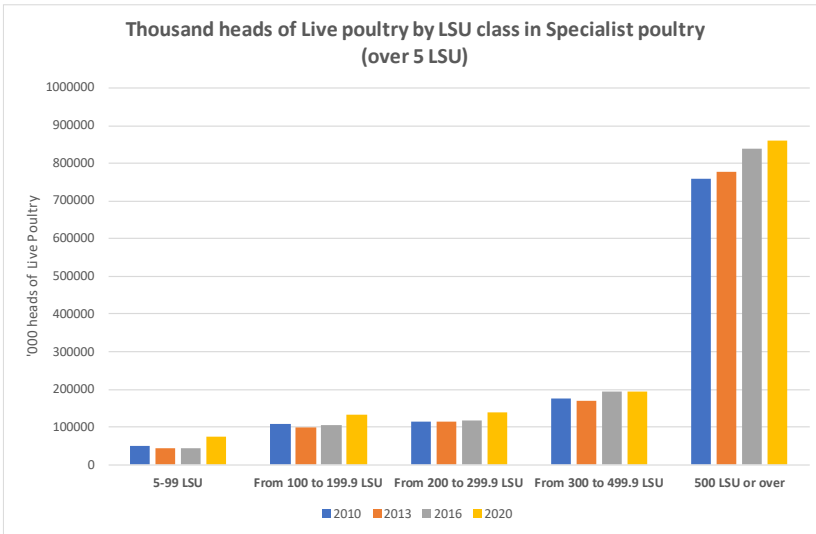
LSU for poultry:
 broiler- 0,007
 laying hen- 0,014
 turkey- 0,03
 duck- 0,01
 geese- 0,02



Specialist poultry - EU

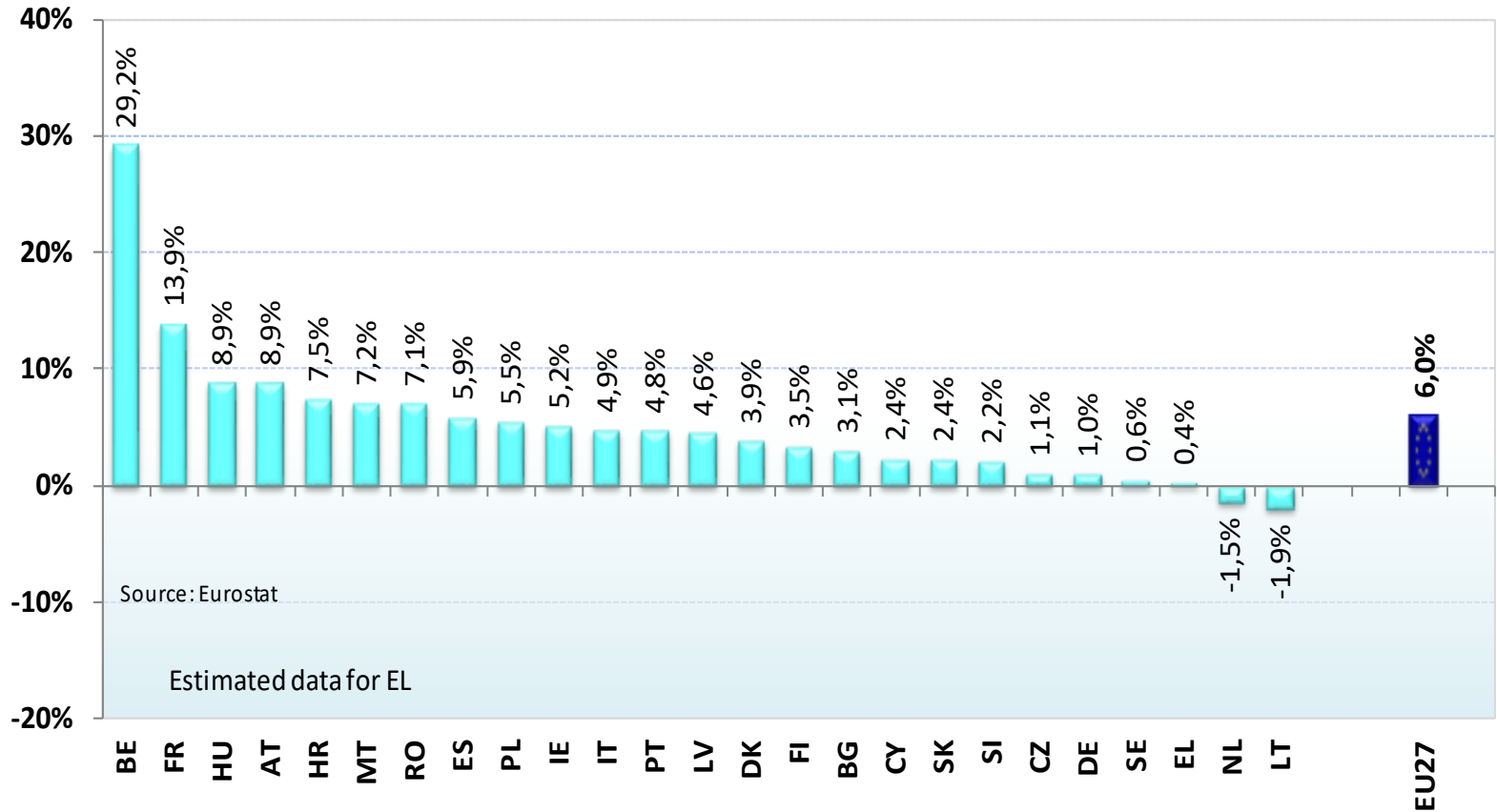
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-7% compared to 2016)
- 14.167.720 LSU in 2020 (-11% compared to 2016)

FARM STRUCTURE SURVEY



PRODUCTION

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

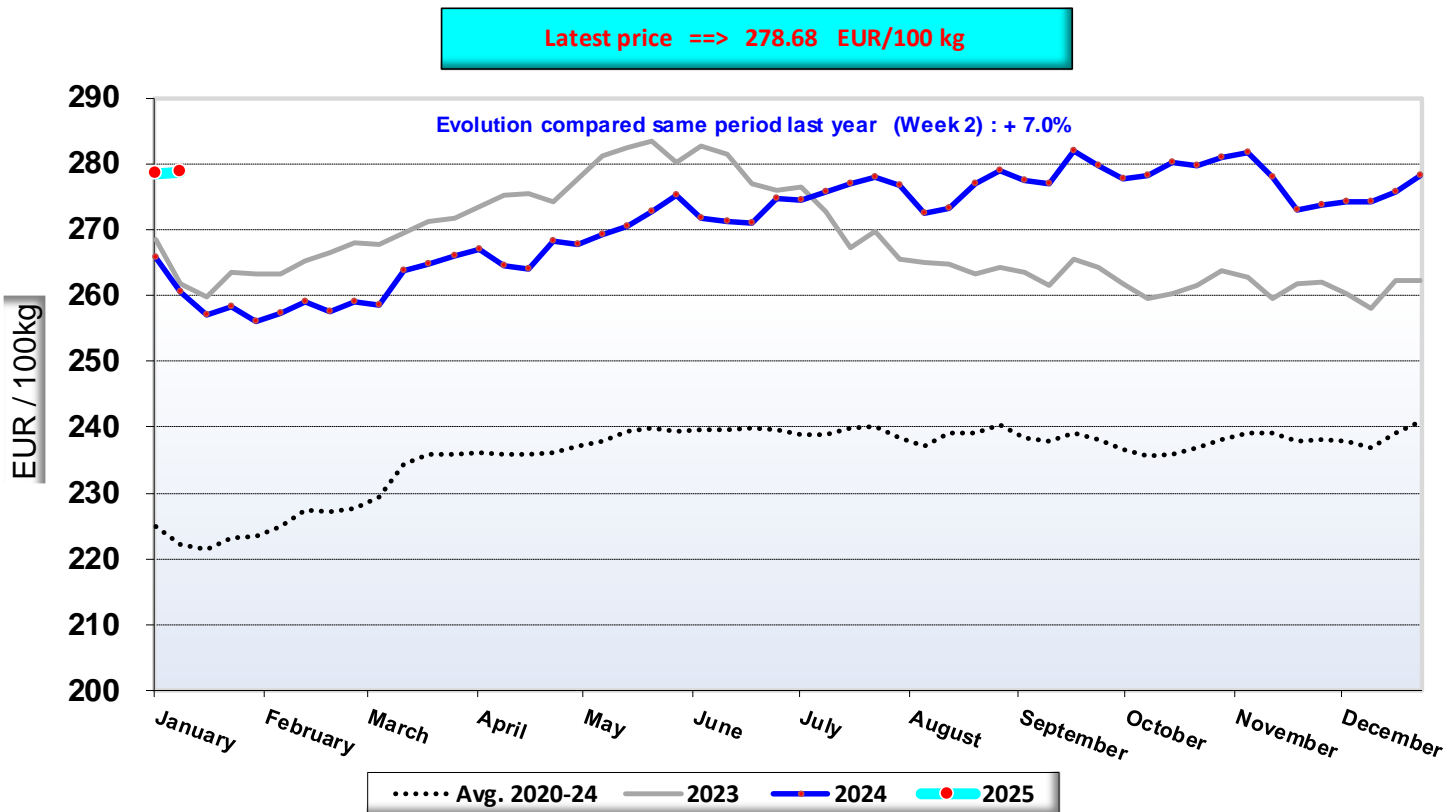


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PRICES

EU EVOLUTION BROILER

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

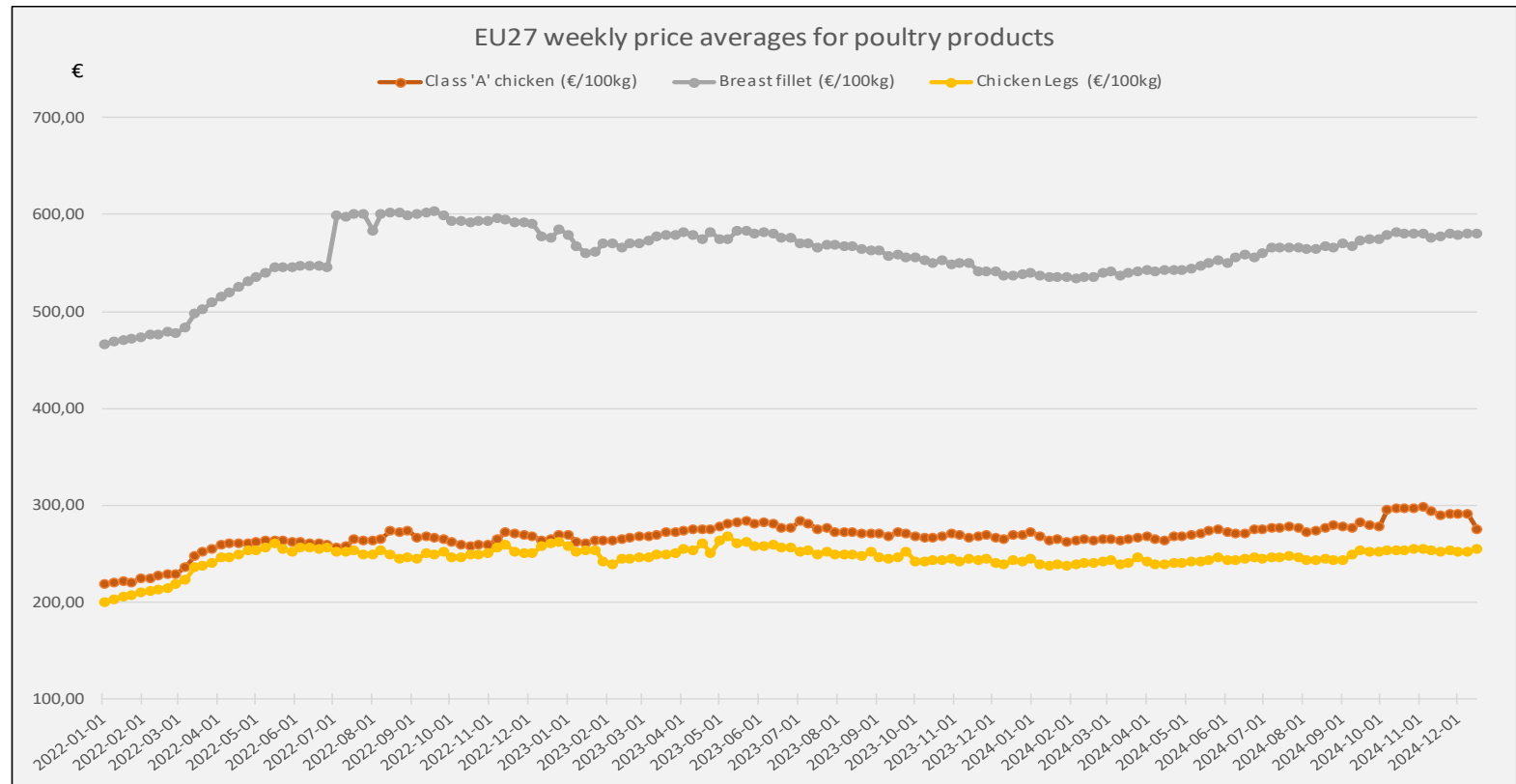


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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Weekly prices of poultry products

Week - 51 EU27 weekly price averages for poultry products

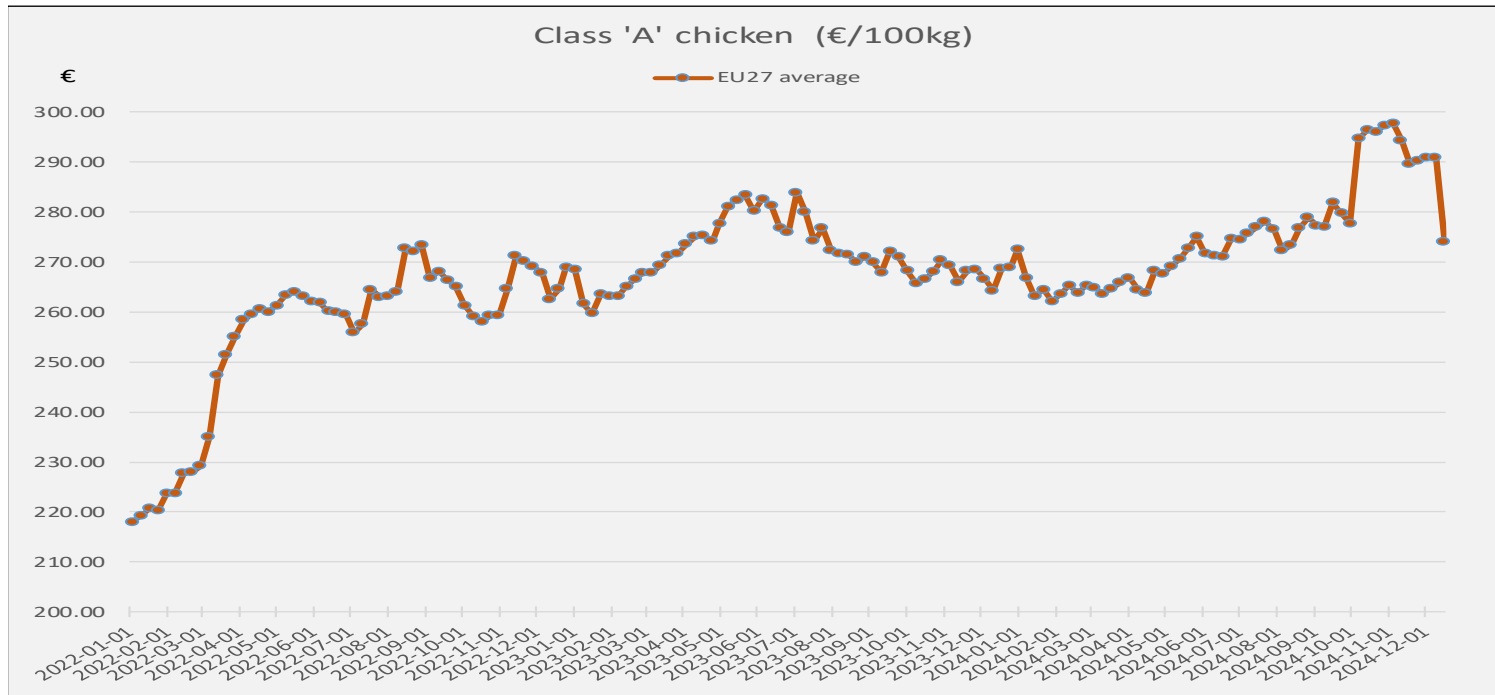


Week - 51	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	274,14	580,95	253,97

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 - 51 Class 'A' chicken



Week - 51	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	274.14	- 5.8%	- 5.4%	+ 2.0%

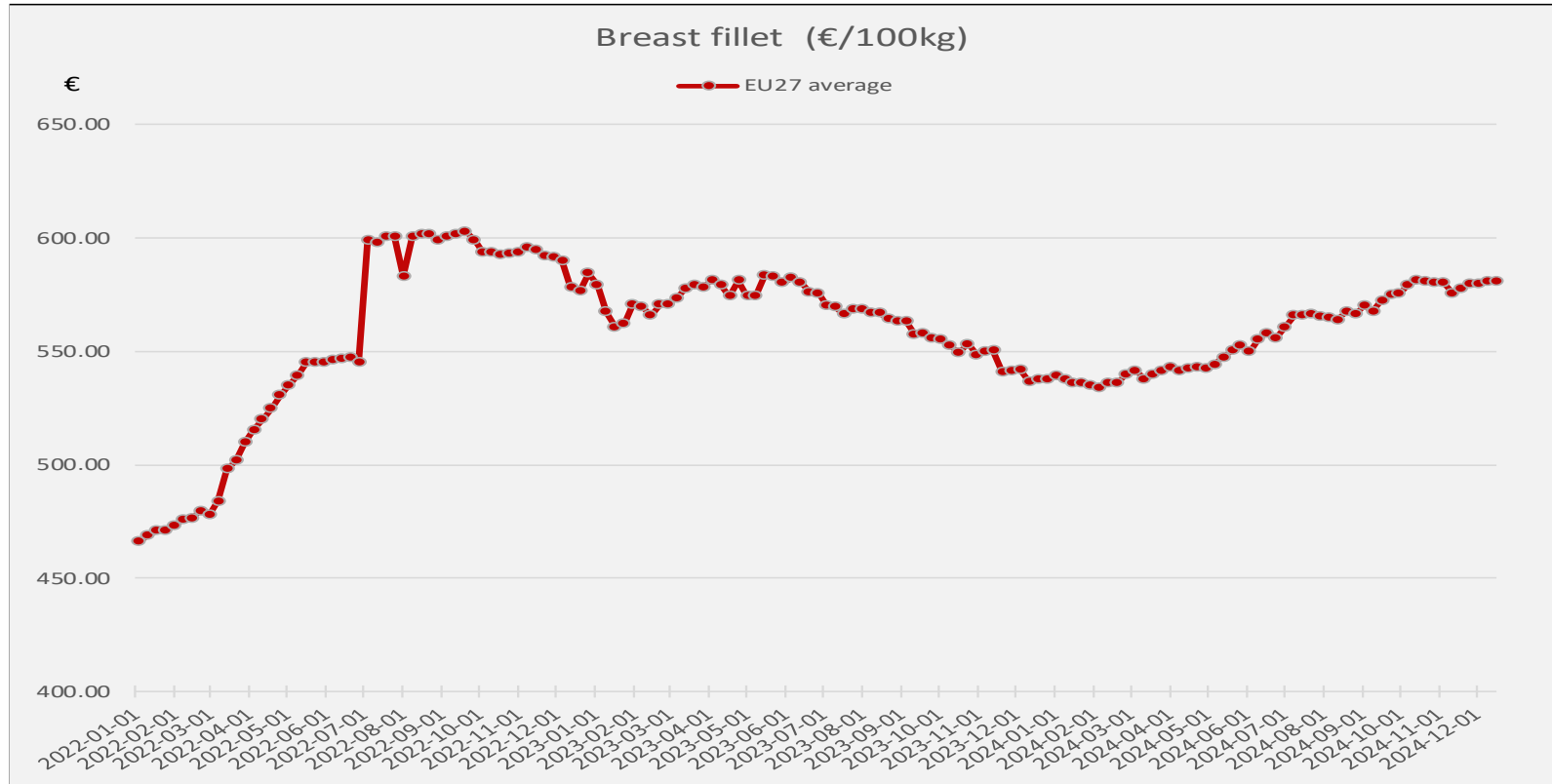
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Breast fillet'

Week - 51 Breast fillet



Week - 51	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	580.95	- 0.0%	+ 0.6%	+ 8.1%

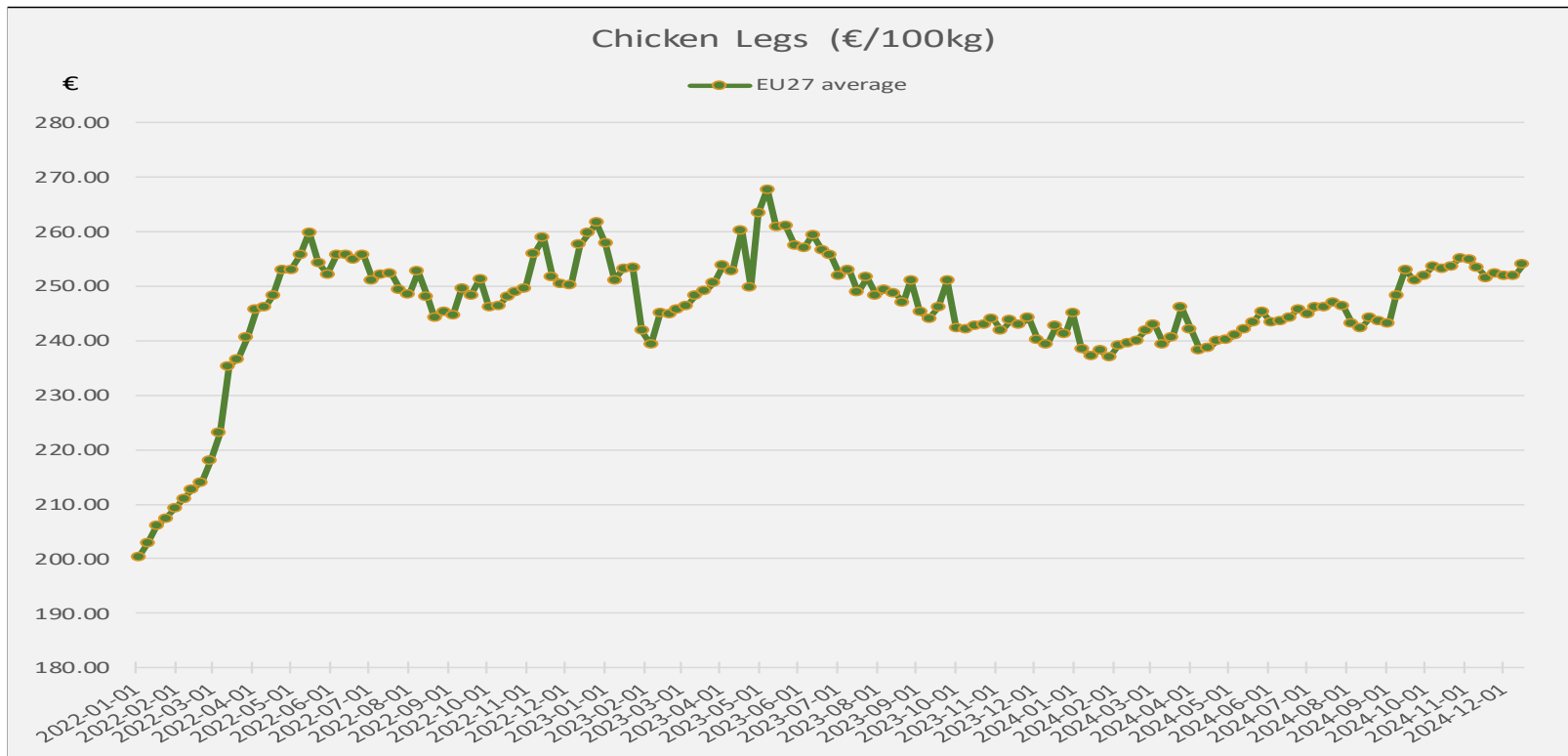
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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

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Weekly price of 'Chicken legs'

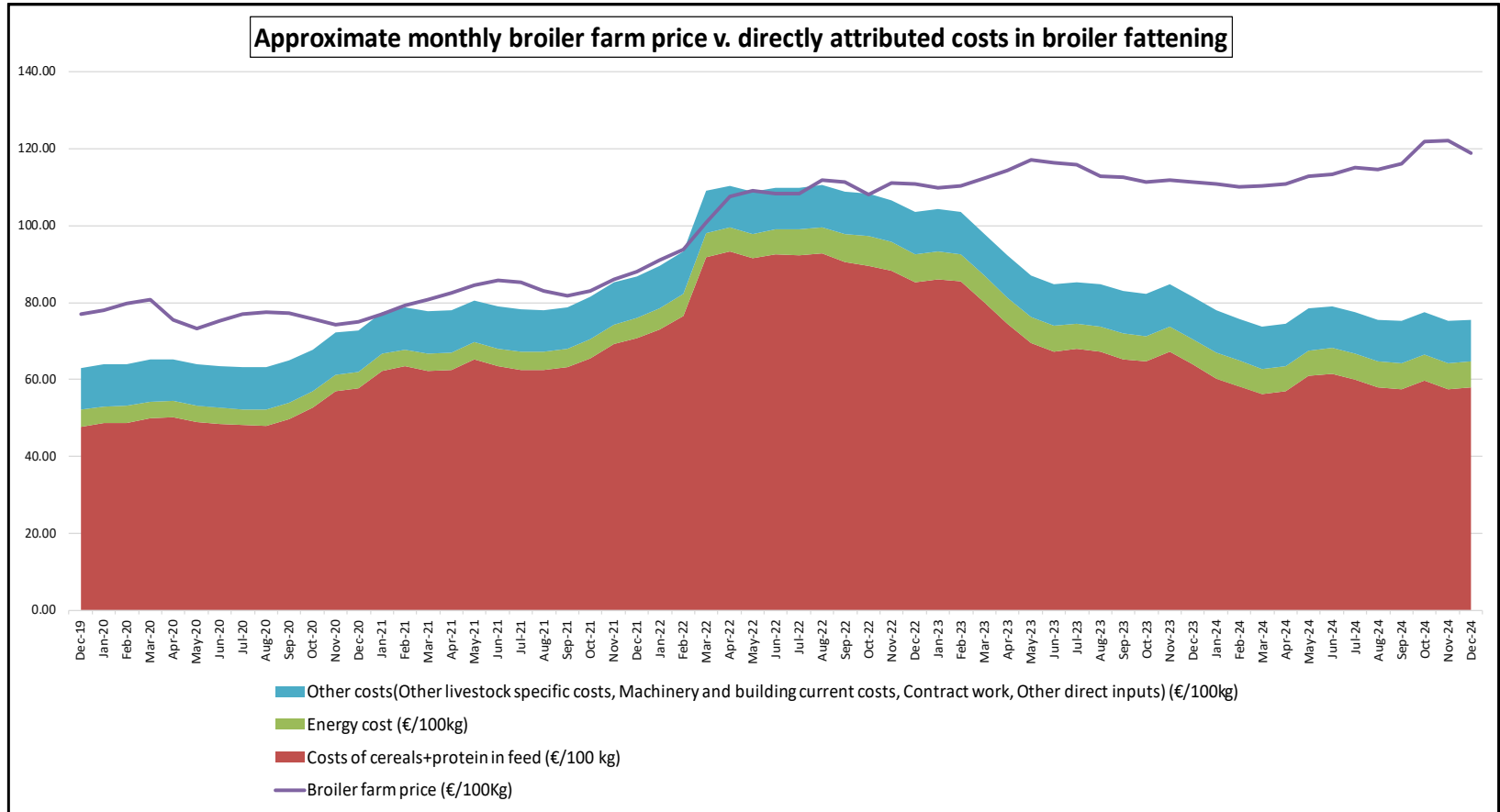
Week - 51 Chicken Legs



Week - 51	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	253.97	+ 0.8%	+ 1.0%	+ 4.6%

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

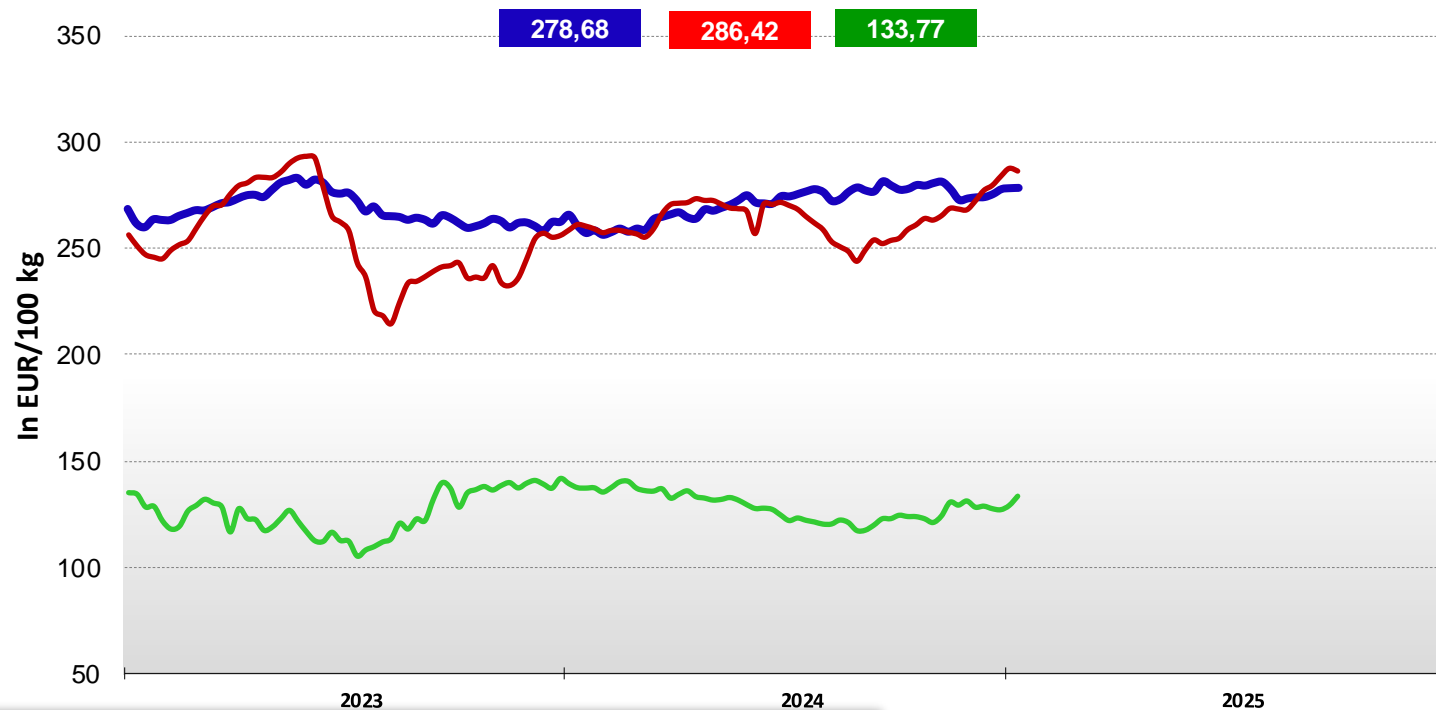
COST BROILER PRODUCTION



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'.

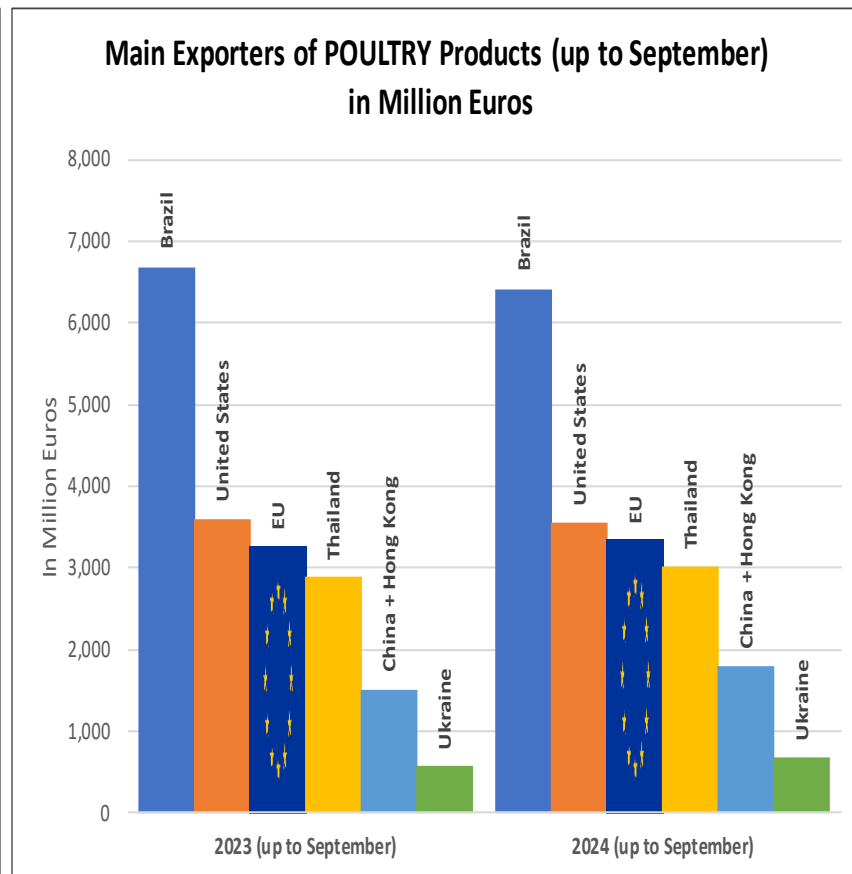
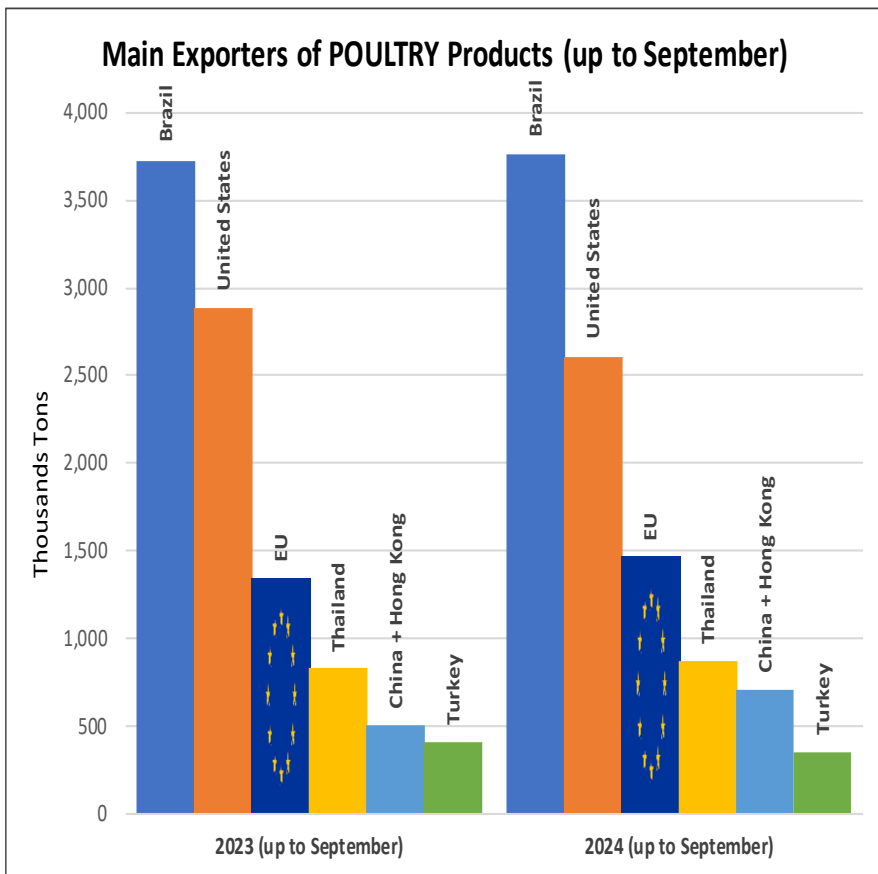
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !

Broiler prices in EU, USA and Brazil



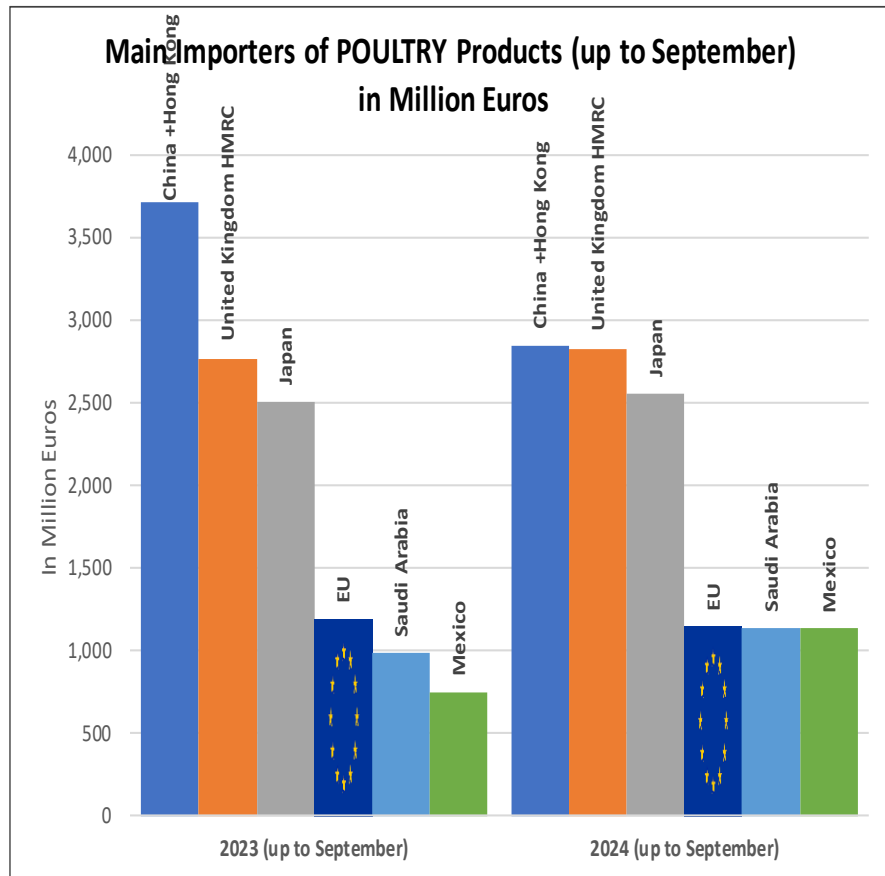
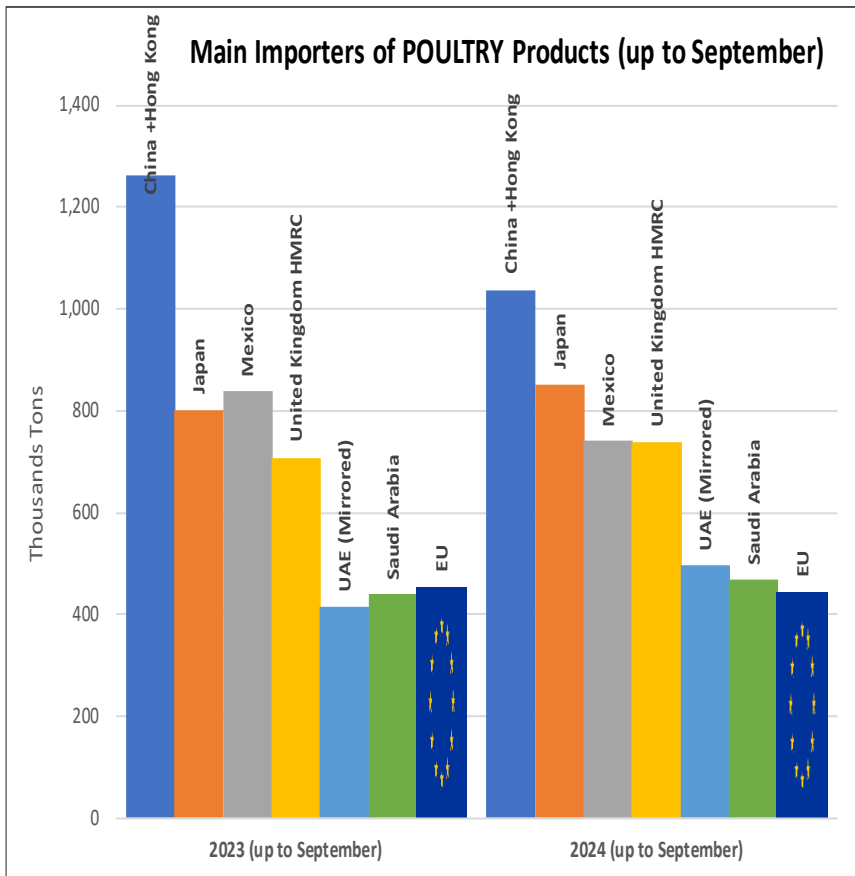
Sources : EU = weighted average of country prices - Broiler 65%
US = weekly USDA prices - Fresh chicken grade A ,Chicago
BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

— EU — US — BR



Source: Trade Data Monitor

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Source: Trade Data Monitor

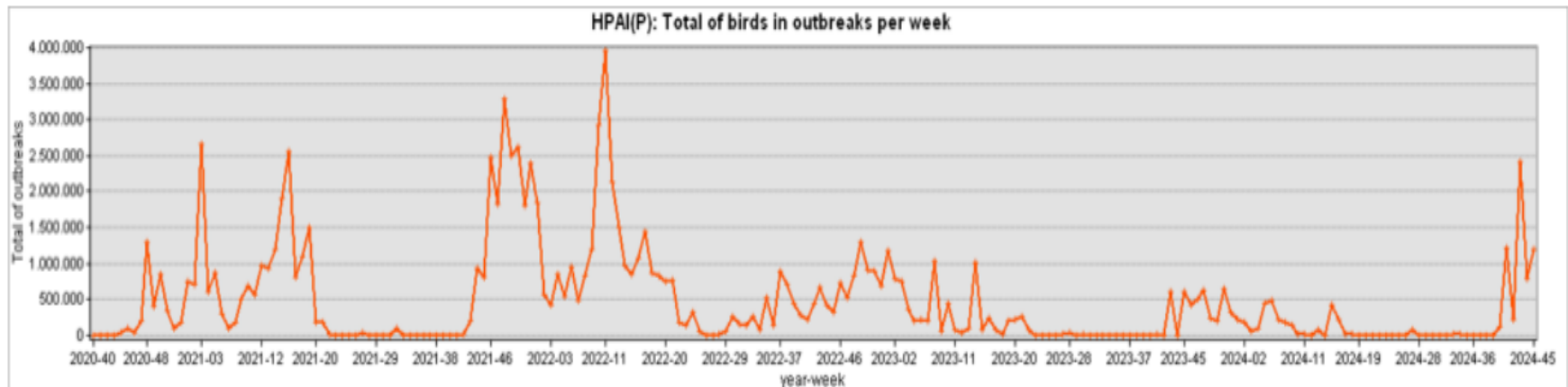
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Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 13/01/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
IT	51	3.166.330	17%	31%
HU	178	2.930.638	60%	29%
PL	26	2.675.807	9%	26%
SK	2	425.260	1%	4%
BG	3	382.276	1%	4%
FR	9	162.372	3%	2%
DE	13	154.226	4%	2%
AT	6	148.001	2%	1%
Other MS	10	217.677	3%	2%
Grand Total	298	10.262.587	100%	100%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	14	1.072.609	5%	10%
Laying hen	27	4.925.992	9%	48%
Duck	123	1.962.204	41%	19%
Turkey	49	1.234.824	16%	12%
Goose	35	78.633	12%	1%
Pheasant	2	6.121	1%	0%
Mixed	13	64.233	4%	1%
No information	35	917.971	12%	9%
Grand Total	298	10.262.587	100%	100%



https://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en

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EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

	2020		2021		2022		2023		Jan-Sep 24		Compared to Jan-Sep 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811,675	32%	725,611	32%	747,129	37%	721,867	37%	553,490	34.7%	+ 2.6%
Ghana	213,838	8%	228,066	10%	156,456	8%	149,223	8%	110,175	6.9%	- 0.9%
Congo (Dem. Rep.)	101,987	4%	139,852	6%	125,421	6%	101,020	5%	81,507	5.1%	+ 13.0%
Saudi Arabia	74,407	3%	58,457	3%	74,590	4%	66,759	3%	52,554	3.3%	+ 16.1%
Vietnam	50,977	2%	31,784	1%	29,751	1%	54,230	3%	52,554	3.3%	+ 35.1%
Philippines	195,884	8%	81,155	4%	6,421	0%	4,256	0%	47,046	2.9%	+++
Ukraine	145,871	6%	162,267	7%	105,810	5%	84,639	4%	44,654	2.8%	- 33.7%
Congo	28,551	1%	30,303	1%	35,562	2%	46,737	2%	39,152	2.5%	+ 22.7%
Guinea	28,576	1%	31,324	1%	32,876	2%	33,612	2%	33,466	2.1%	+ 23.5%
Benin	61,472	2%	64,358	3%	63,516	3%	61,286	3%	32,957	2.1%	- 32.4%
<i>Other Destinations</i>	<i>807,514</i>	<i>32%</i>	<i>699,196</i>	<i>31%</i>	<i>667,370</i>	<i>33%</i>	<i>638,955</i>	<i>33%</i>	<i>547,703</i>	<i>34.3%</i>	
Extra-EU	2,520,753		2,252,374		2,044,902		1,962,584		1,595,259		
% change			- 11%		- 9%		- 4%		+ 10.3%		

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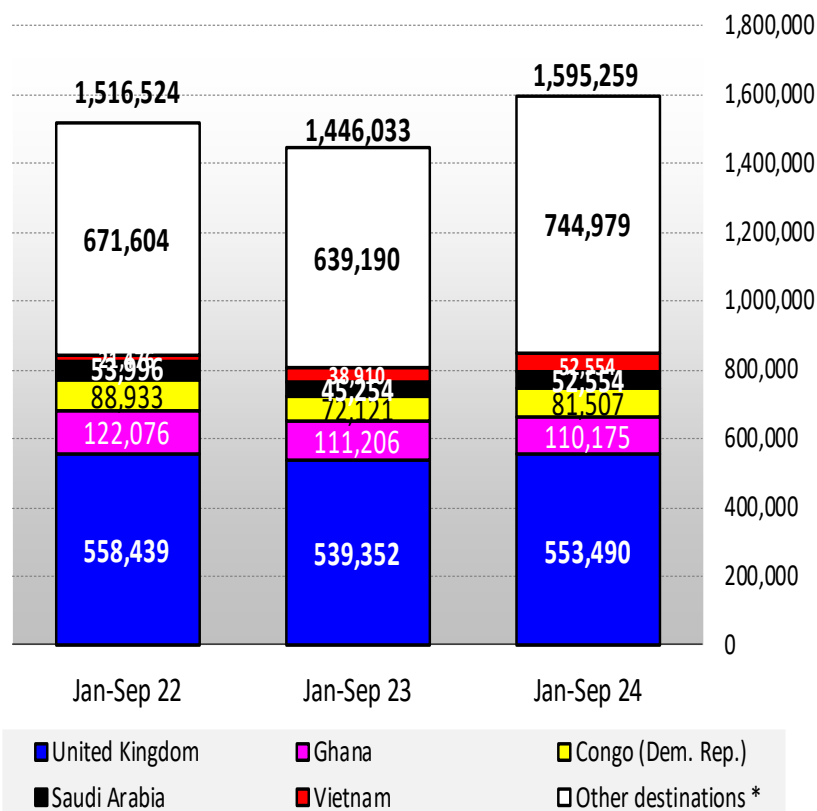
EU-27 Exports of poultry meat to selected destinations

	2020		2021		2022		2023		Jan-Sep 24		Compared to Jan-Sep 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%	2,594,134	66%	1,946,902	49.7%	+ 0.2%
Ghana	172,363	4%	224,103	6%	167,715	4%	156,970	4%	110,160	2.8%	- 5.8%
Congo (Dem. Rep.)	81,033	2%	116,553	3%	145,766	4%	112,110	3%	84,623	2.2%	+ 3.1%
Saudi Arabia	104,518	3%	93,283	2%	159,672	4%	128,754	3%	110,579	2.8%	+ 29.3%
Vietnam	55,251	1%	35,592	1%	39,533	1%	67,641	2%	63,686	1.6%	+ 34.2%
Philippines	86,502	2%	57,220	1%	7,793	0%	6,571	0%	28,036	0.7%	+++
Ukraine	100,109	3%	119,533	3%	102,729	3%	125,678	3%	79,648	2.0%	- 19.6%
Congo	23,311	1%	26,636	1%	36,276	1%	42,776	1%	33,844	0.9%	+ 19.7%
Guinea	26,028	1%	31,994	1%	43,756	1%	47,225	1%	40,212	1.0%	+ 3.7%
Benin	64,292	2%	87,264	2%	106,959	3%	103,984	3%	43,832	1.1%	- 47.4%
<i>Other Destinations</i>	1,224,722	31%	1,170,503	30%	1,273,560	32%	1,360,581	35%	1,092,491	27.9%	
Extra-EU	3,920,057		3,972,355		4,736,152		4,746,424		3,634,015		
% change			+ 1%		+ 19%		+ 0%		+ 3.5%		

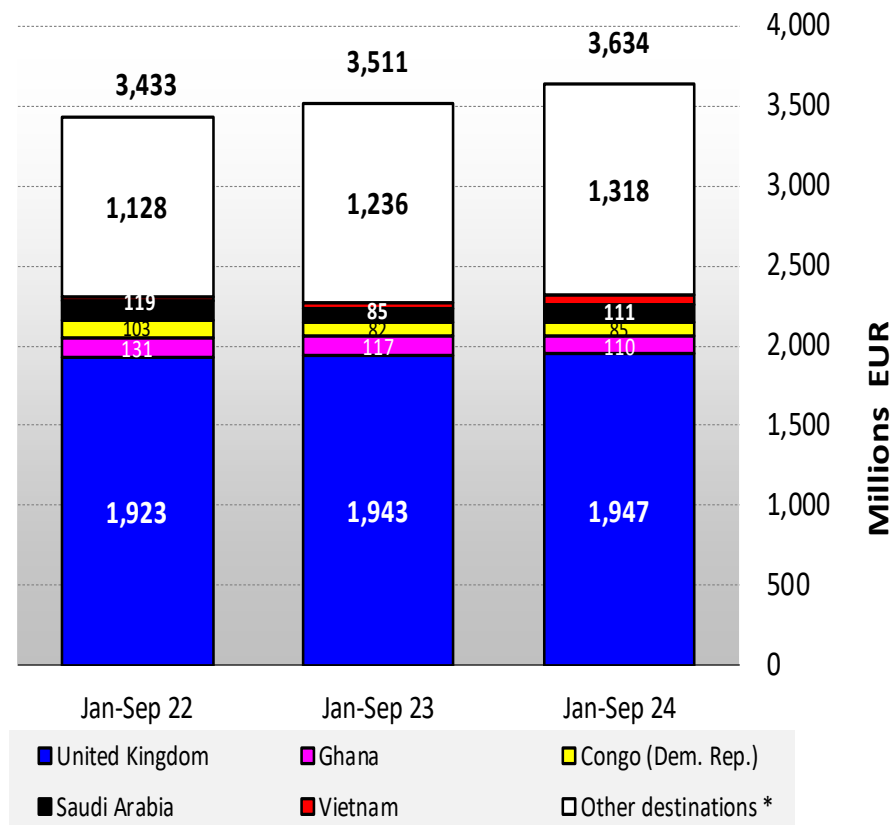
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EU-27 poultry meat exports (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)



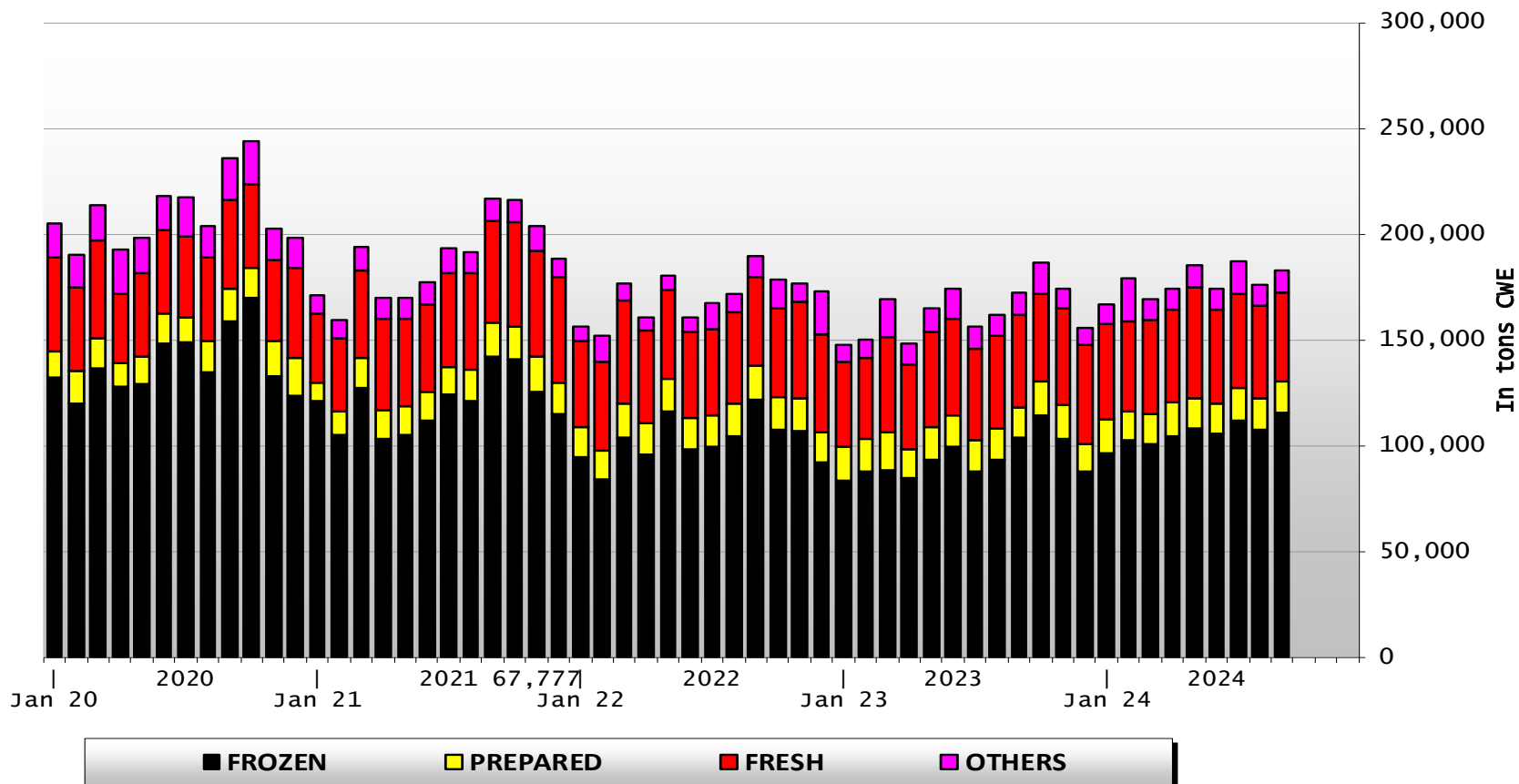
EU EXPORTS of Poultry Meat (Millions EUR)



* countries trading less than 80 ('Millions EUR)

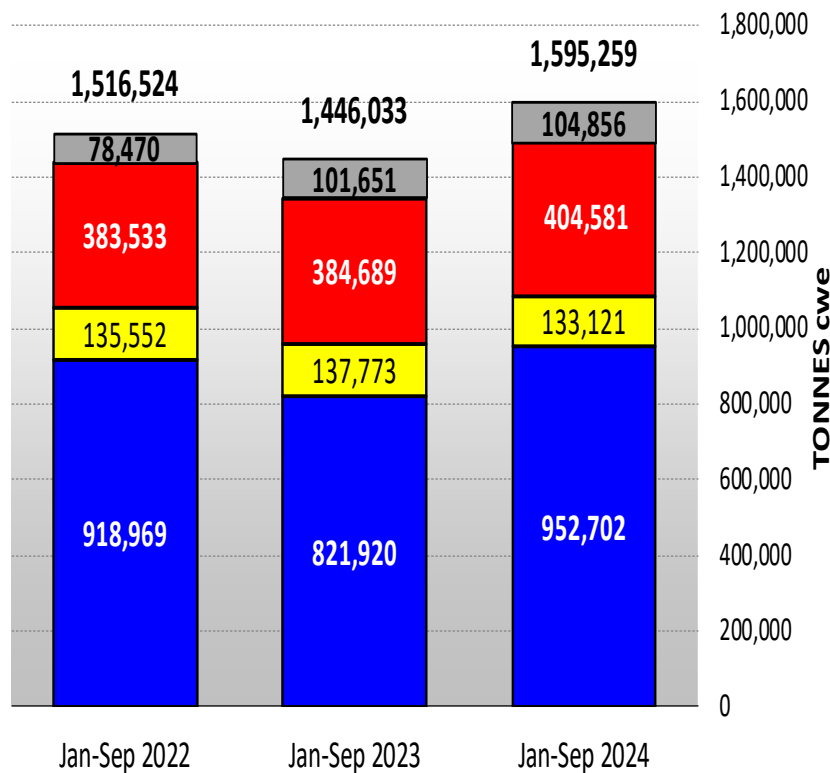
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Exports of selected Poultry products



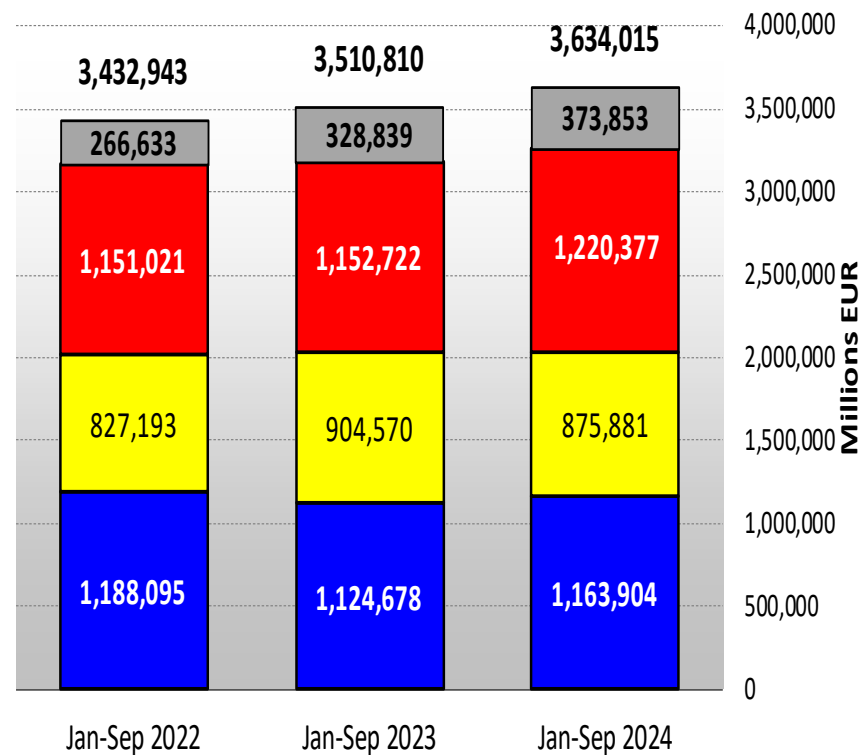
EU-27 poultry meat exports (by meat type)

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

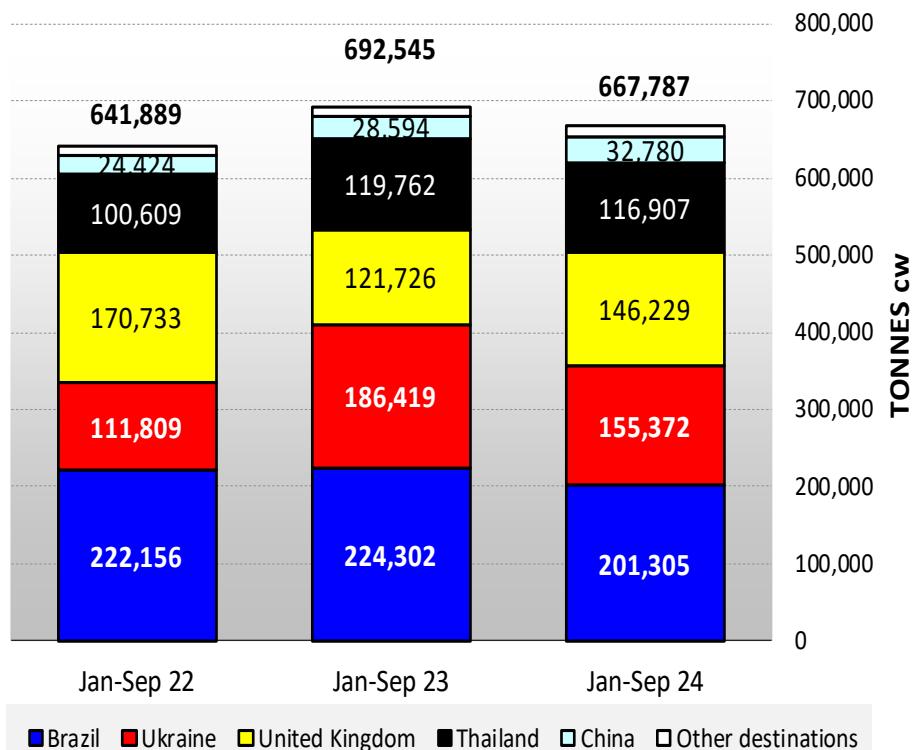
	2020		2021		2022		2023		Jan-Sep 24		Compared to Jan-Sep 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227,738	28%	251,887	32%	299,536	35%	288,723	32%	201,305	30.1%	- 10.3%
Ukraine	108,669	14%	102,892	13%	160,697	19%	231,906	26%	155,372	23.3%	- 16.7%
United Kingdom	293,914	37%	274,667	34%	210,806	25%	171,949	19%	146,229	21.9%	+ 20.1%
Thailand	131,374	16%	130,658	16%	131,954	15%	148,698	17%	116,907	17.5%	- 2.4%
China	17,017	2%	20,916	3%	32,864	4%	36,561	4%	32,780	4.9%	+ 14.6%
Argentina	3,273	0%	3,151	0%	4,096	0%	4,079	0%	4,060	0.6%	+++
Chile	14,382	2%	2,441	0%	466	0%	3,213	0%	2,968	0.4%	+ 37.0%
Other Destinations	8,404	1%	10,445	1%	11,076	1%	10,179	1%	8,166	1.2%	
Extra-EU	804,772		797,056		851,494		895,307		667,787		
% change			- 1%		+ 7%		+ 5%		- 3.6%		

EU-27 Imports of poultry meat from selected origins

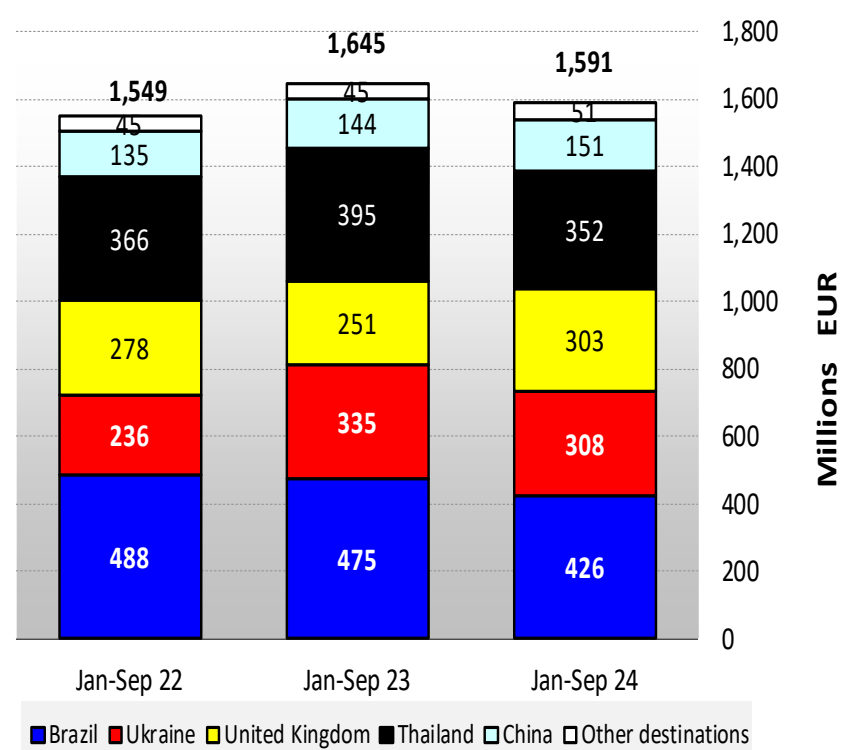
	2020		2021		2022		2023		Jan-Sep 24		Compared to Jan-Sep 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351,277	24%	388,472	29%	669,772	31%	598,220	28%	426,150	26.8%	- 10.4%
Ukraine	132,740	9%	166,208	12%	324,836	15%	418,449	20%	307,659	19.3%	- 8.1%
United Kingdom	501,768	34%	327,273	24%	369,259	17%	354,848	17%	302,980	19.0%	+ 20.8%
Thailand	316,860	22%	317,487	24%	519,175	24%	490,197	23%	351,902	22.1%	- 10.9%
China	78,298	5%	95,081	7%	186,175	9%	183,071	9%	151,065	9.5%	+ 4.6%
Argentina	6,515	0%	6,508	0%	11,463	1%	11,360	1%	9,660	0.6%	+ 59.5%
Chile	35,557	2%	6,019	0%	1,537	0%	7,254	0%	6,680	0.4%	+ 29.0%
Bosnia-Herz.	7,809	1%	10,345	1%	10,728	1%	9,362	0%	13,114	0.8%	+ 89.4%
Switzerland	6,229	0%	5,300	0%	8,975	0%	6,730	0%	4,921	0.3%	- 2.0%
Norway	5,280	0%	7,914	1%	8,286	0%	8,888	0%	7,791	0.5%	+ 16.1%
<i>Other Destinations</i>	<i>16,429</i>	<i>1%</i>	<i>15,466</i>	<i>1%</i>	<i>18,949</i>	<i>1%</i>	<i>20,191</i>	<i>1%</i>	<i>8,980</i>	<i>0.6%</i>	
Extra-EU	1,458,760		1,346,074		2,129,156		2,108,569		1,590,902		
% change			- 8%		+ 58%		- 1%		- 3.3%		

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

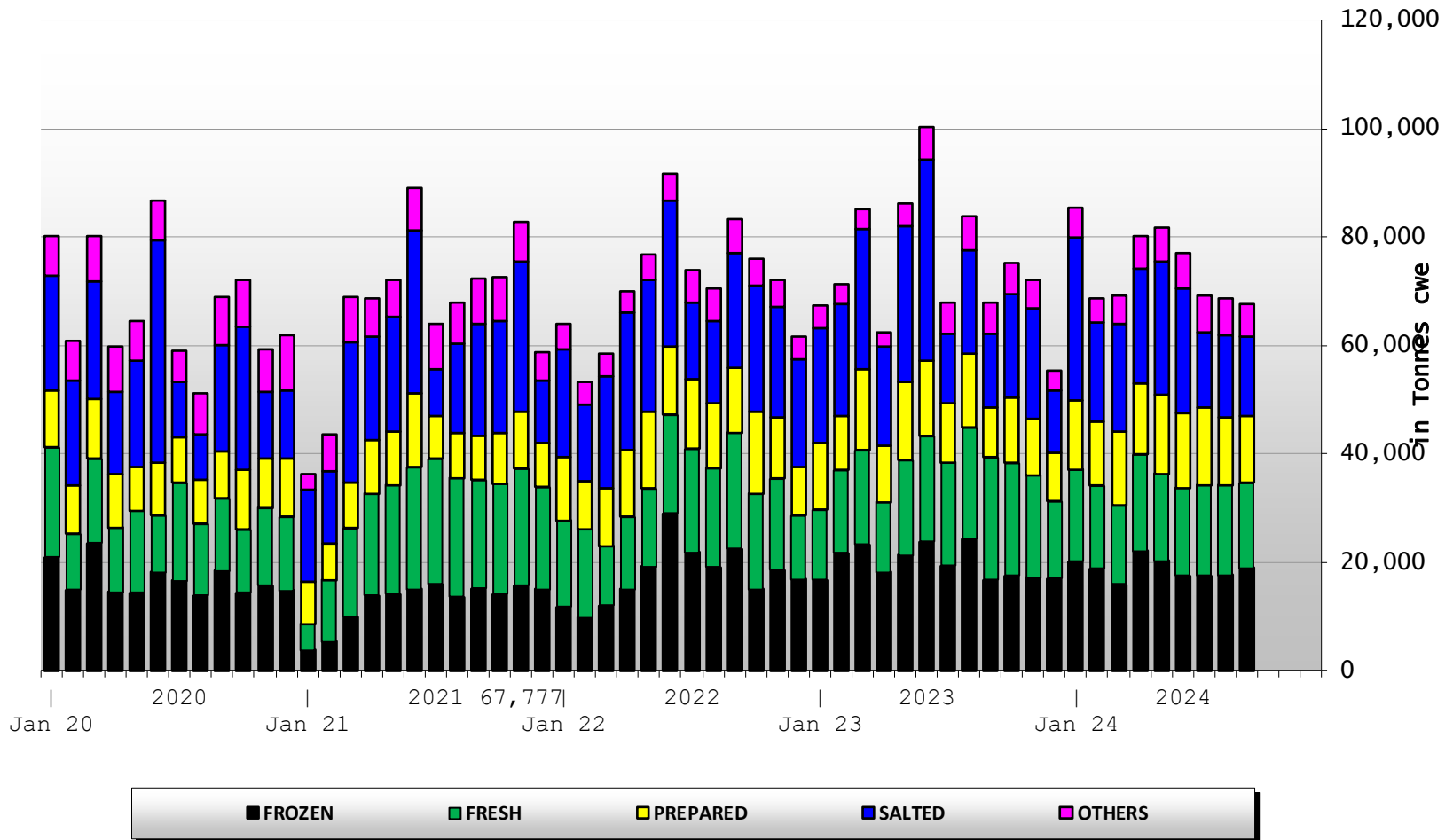


EU IMPORTS of Poultry Meat (Millions EUR)



23 January 2025

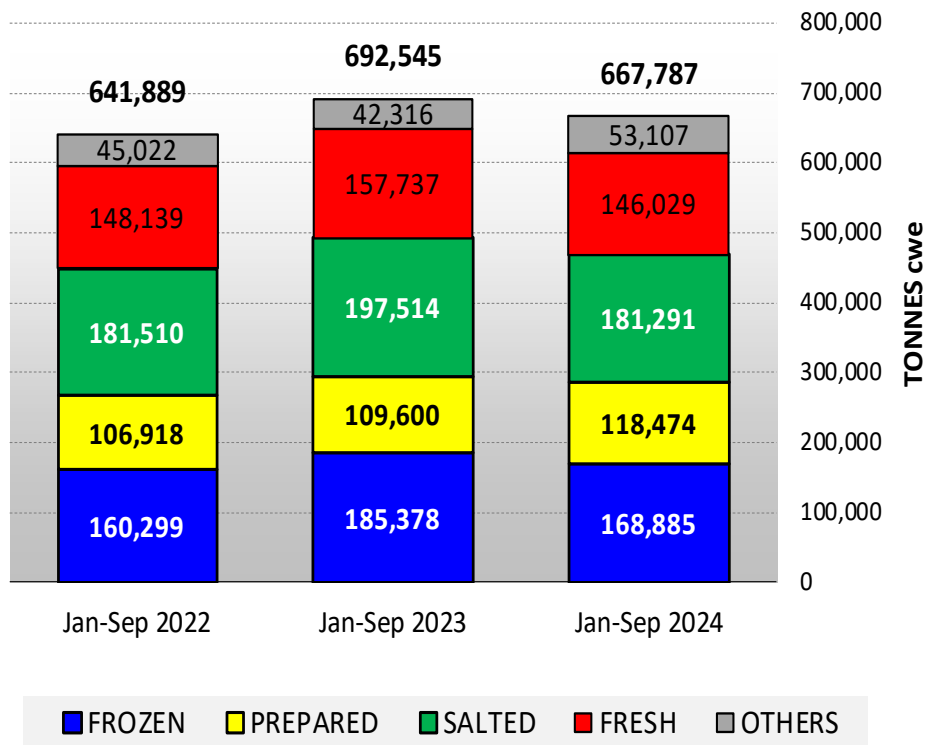
Imports of selected Poultry products



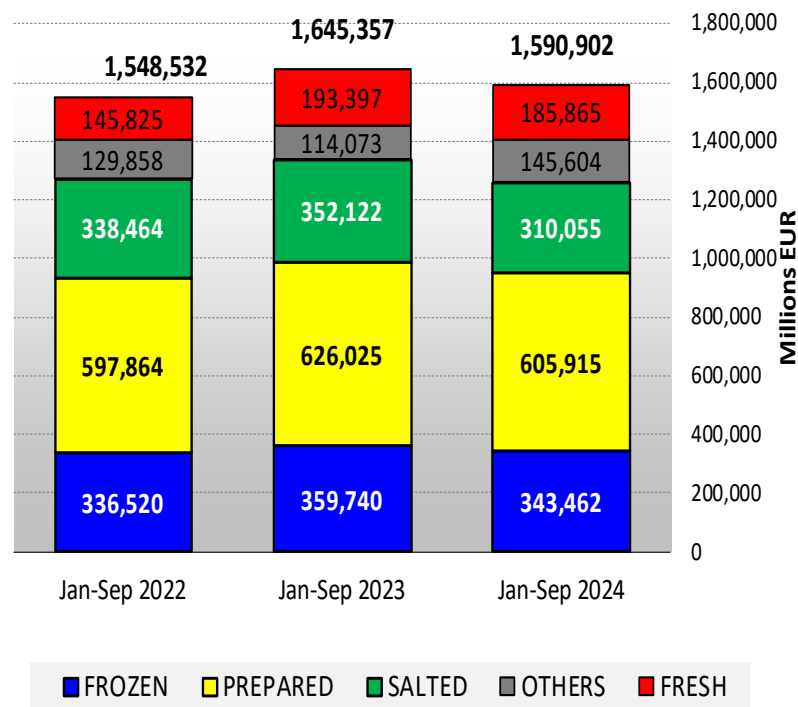
23 January 2025

EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)

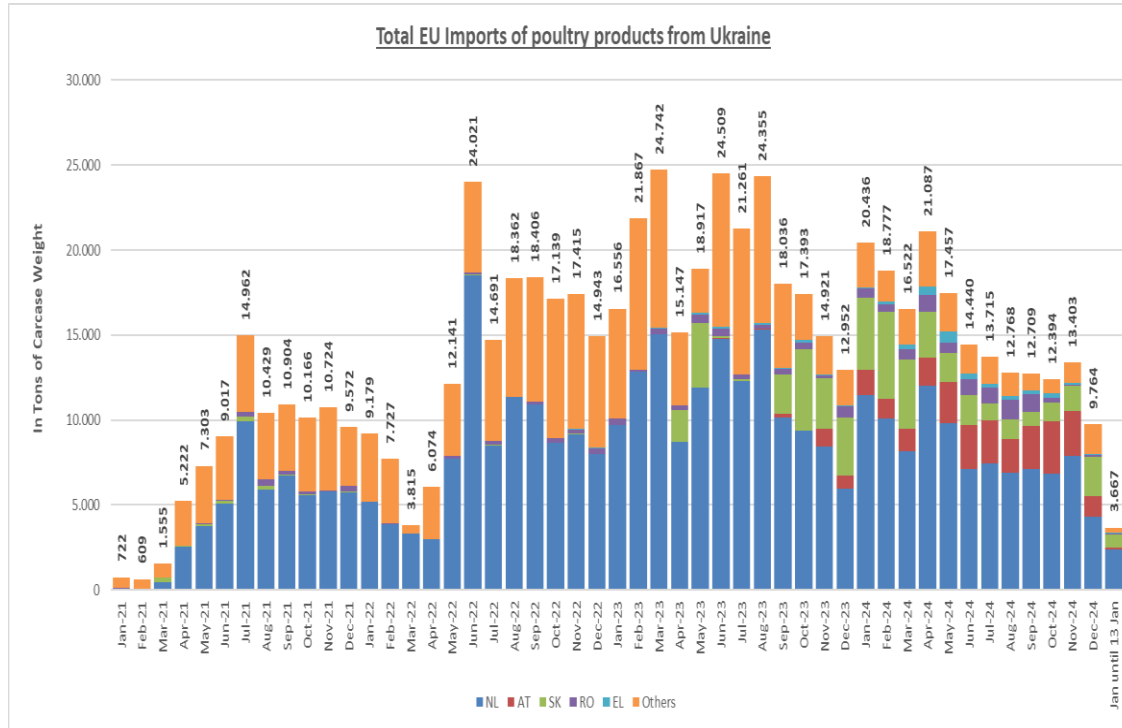


EU IMPORTS of Poultry Meat (Millions EUR)



TRADE

EU IMPORTS



Please note that this data shows total poultry imports and does not correspond only to poultry products subject to the automatic emergency brake as foreseen by Regulation 2023/1077. **The trigger level for the period 1 January- 5 June 2025 is set at 57 101,17 tons of product weight.**

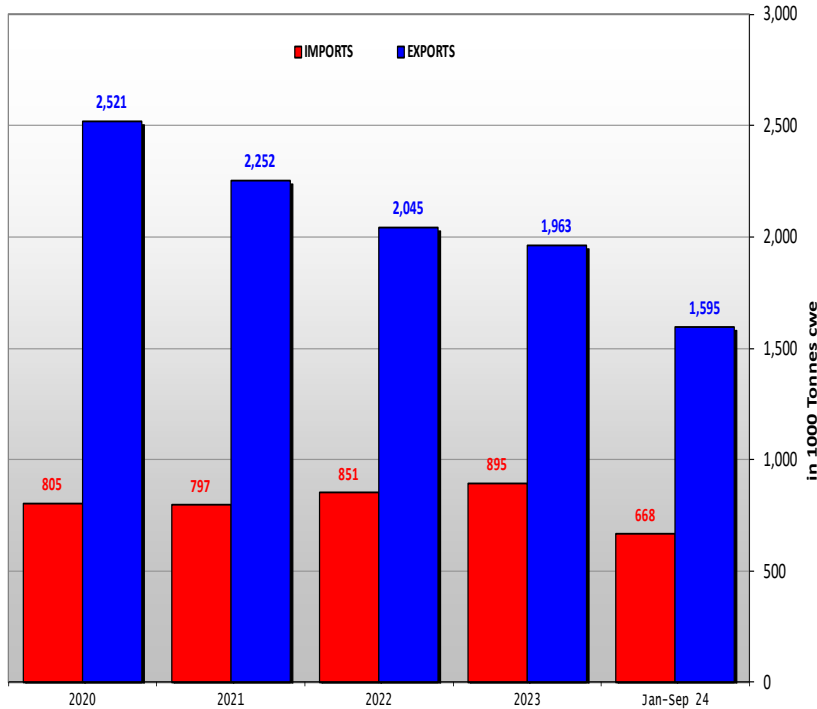
DG AGRI E3, source: **TAXUD surveillance**.
Please note that data is not completely stabilized for most recent periods.

	2022	2023	2024	2025 (until 13 January)
EU Total	163.912	230.658	183.472	3.667
NL	98.192	134.424	99.079	2.370
SK	131	19.456	27.610	763
AT		2.186	24.530	137
RO	1.627	3.947	7.655	30
PL	38.127	26.862	4.943	
LT	3.455	4.282	4.439	56
CZ	527	971	3.357	
EL	112	769	3.103	84
ES		1.895	2.140	56
DE	717	158	1.779	24
BG	23	67	1.470	124
IT	257	629	1.097	24
CY	98	140	1.094	
FR	66	473	491	
EE	1	88	320	
HU	20.565	34.055	261	
BE		98	55	
PT			49	
LV		105		
IE		31		
SE	15	22		

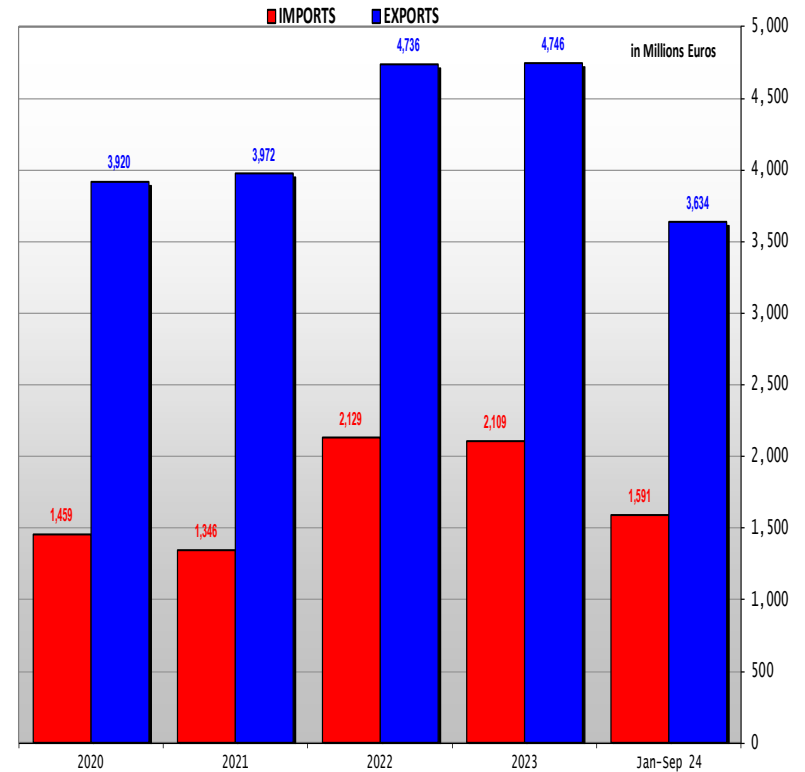
TRADE

BALANCE

in 1000 tons cwe



in million EUR



23 January 2025

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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23 January 2025