

Market Situation for Poultry

CMO GREX on Animal Products - *16 April 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

% change

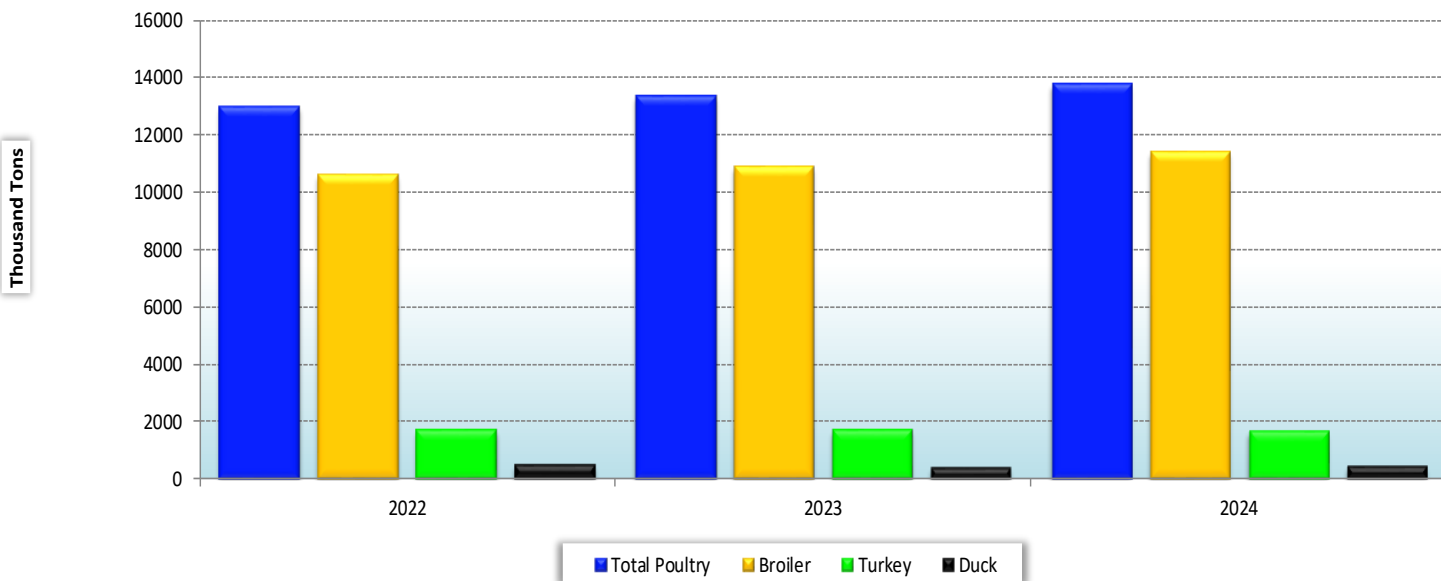
Source : Eurostat, forecast 2024 by MS

	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	↘

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT

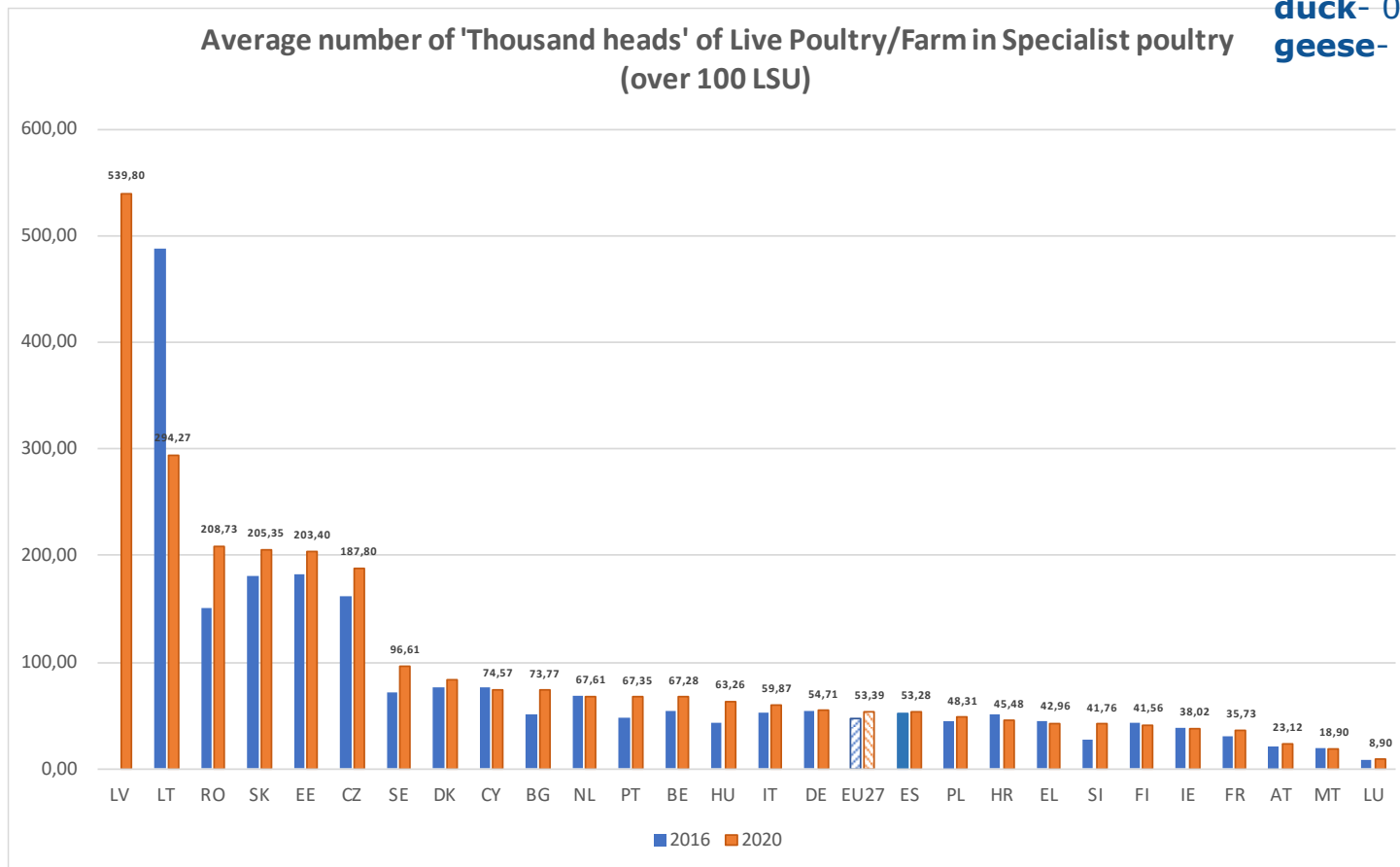


	2022	2023	2024	% 2023/2022	% 2024/2023
Total Poultry	12,988	13,319	13,778	+ 2.5%	+ 3.4%
Broiler	10,588	10,857	11,393	+ 2.5%	+ 4.9%
Turkey	1,651	1,667	1,644	+ 1.0%	- 1.4%
Duck	437	351	416	- 19.7%	+ 18.6%

* Source: Eurostat, forecast 2024 by MS

FARM STRUCTURE SURVEY

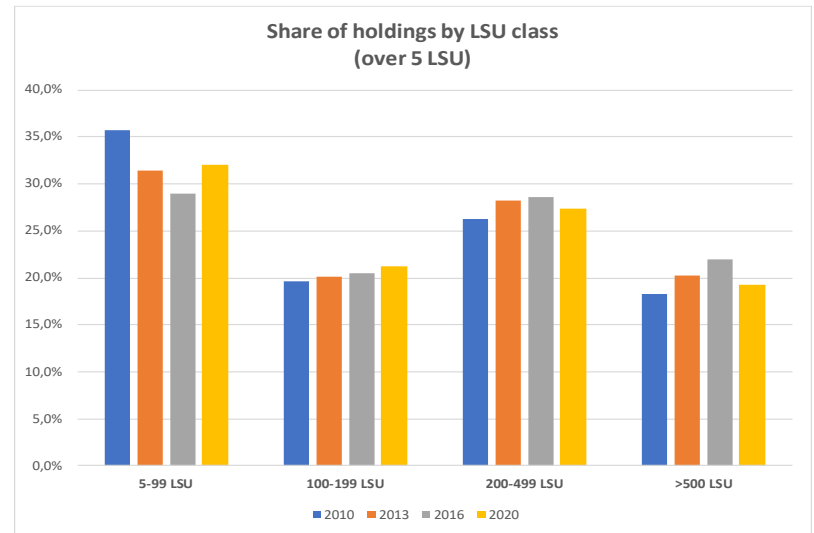
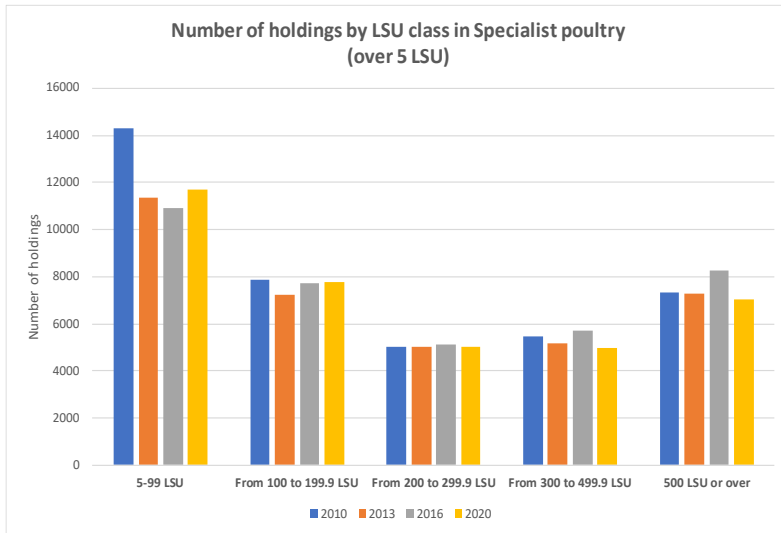
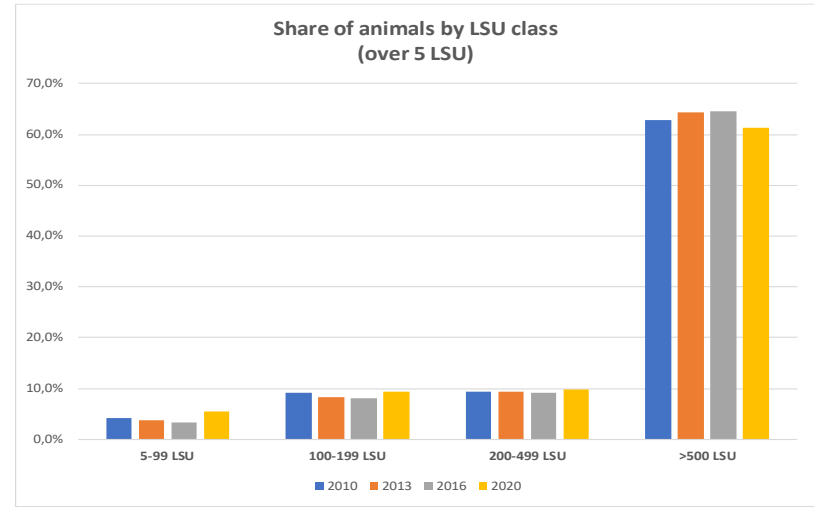
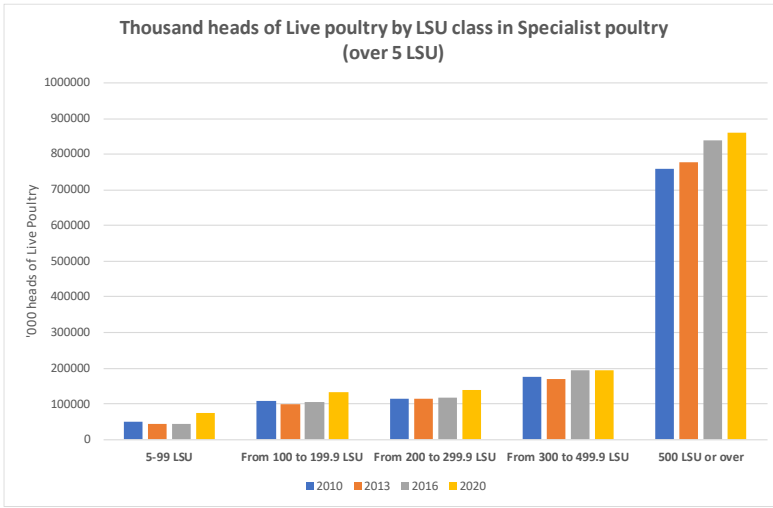
LSU for poultry:
 broiler- 0,007
 laying hen- 0,014
 turkey- 0,03
 duck- 0,01
 geese- 0,02



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)

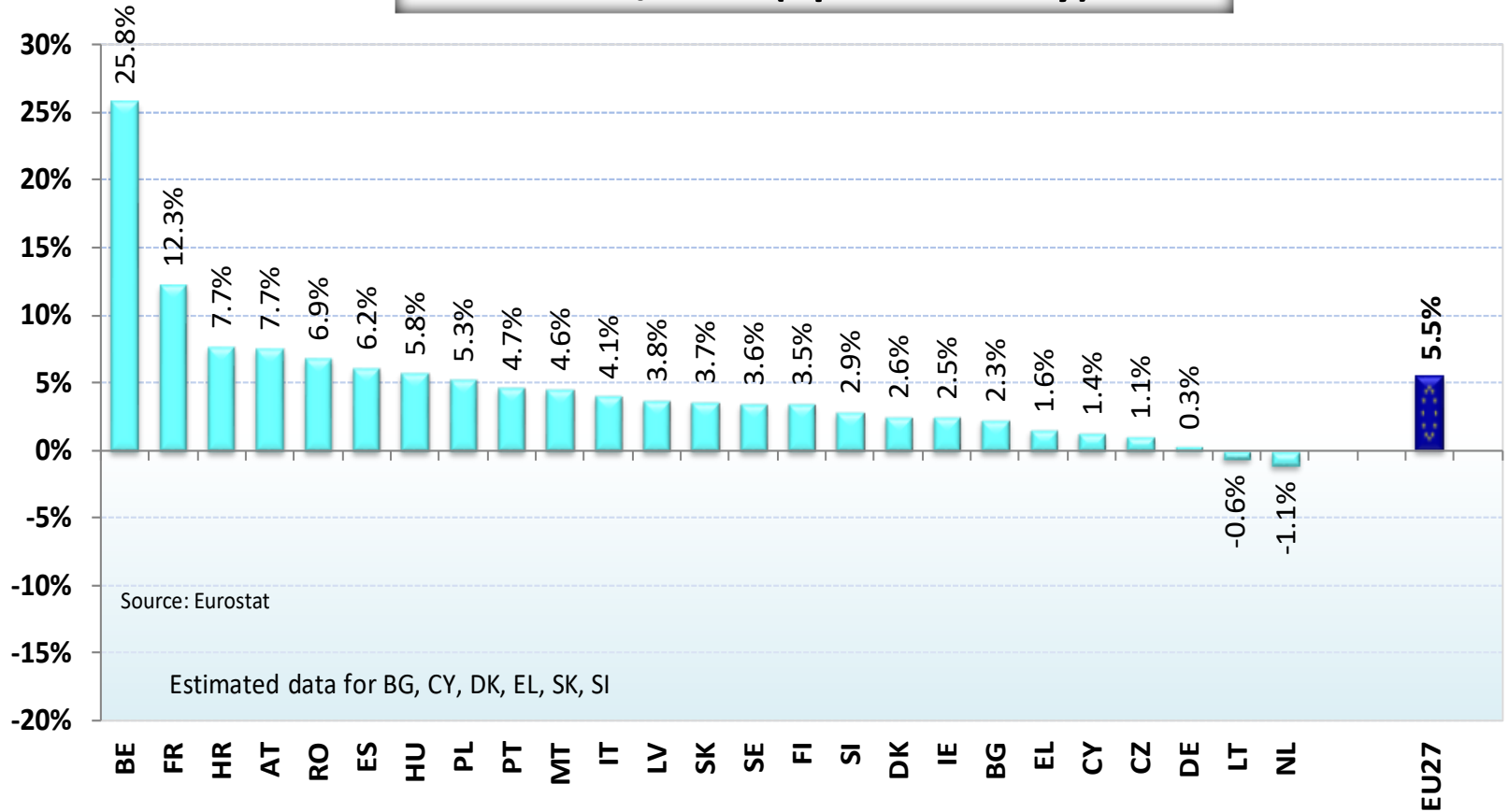


FARM STRUCTURE SURVEY



PRODUCTION

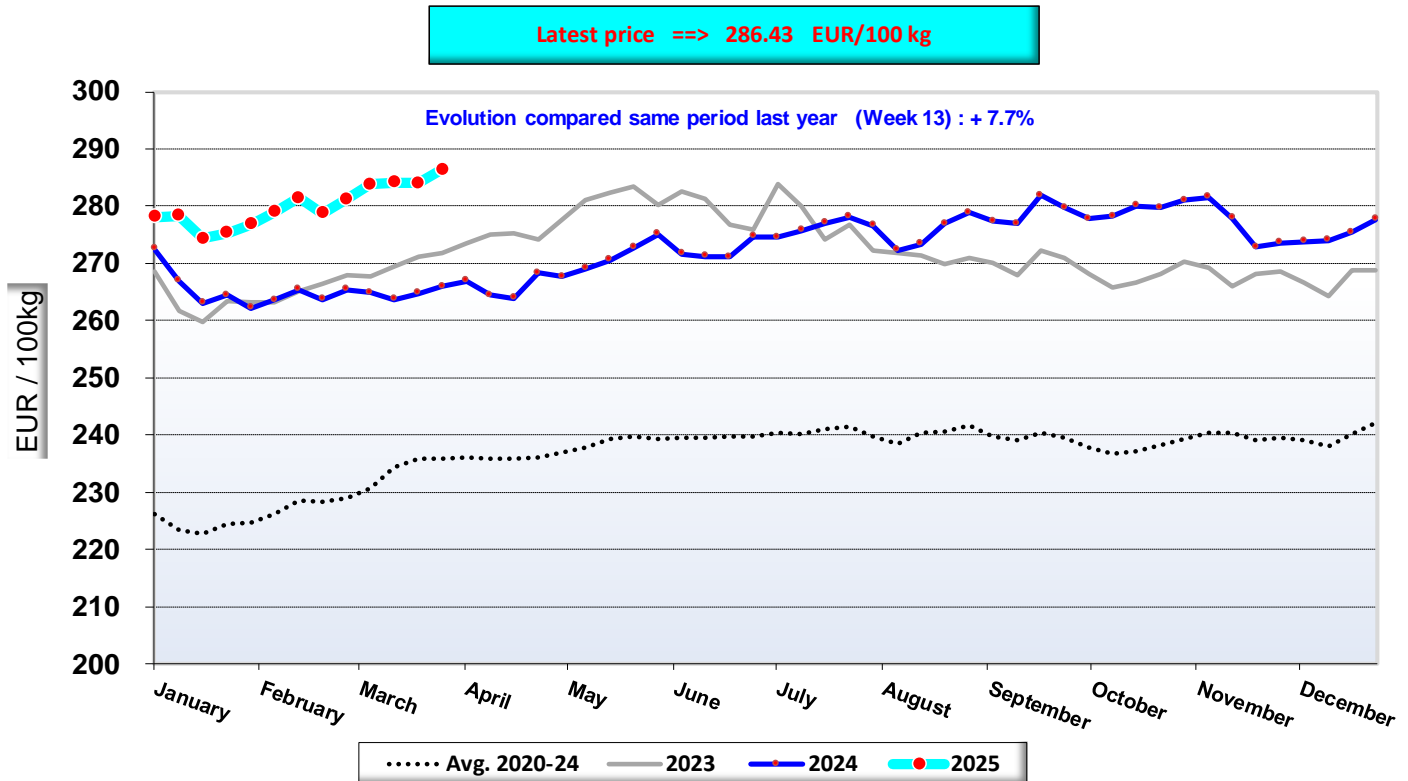
Change in Poultry Meat Production in %
2025/2024 (up to January)



Source: Eurostat

Estimated data for BG, CY, DK, EL, SK, SI

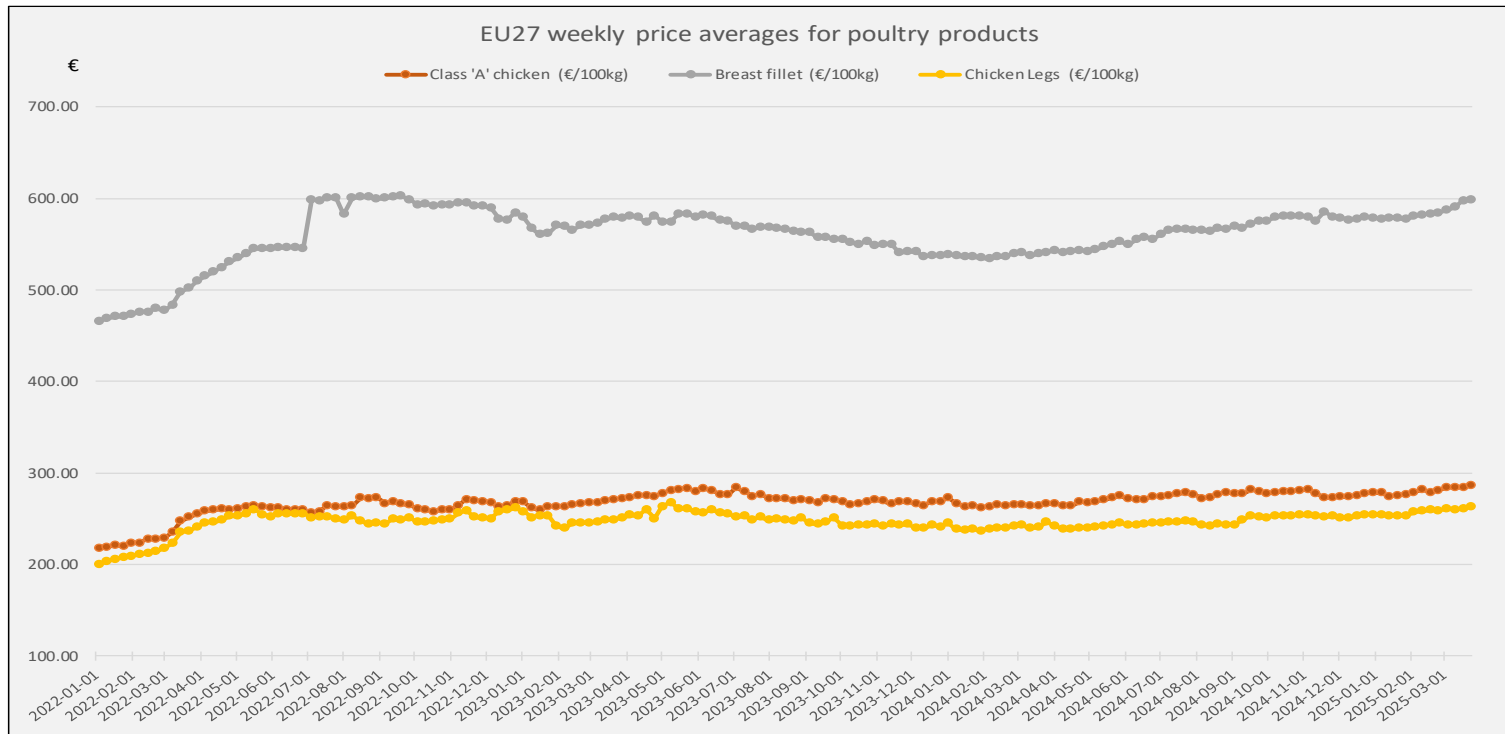
Evolution of the weekly EU* average price for **Broiler**



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

Weekly prices of poultry products

Week - 13 EU27 weekly price averages for poultry products



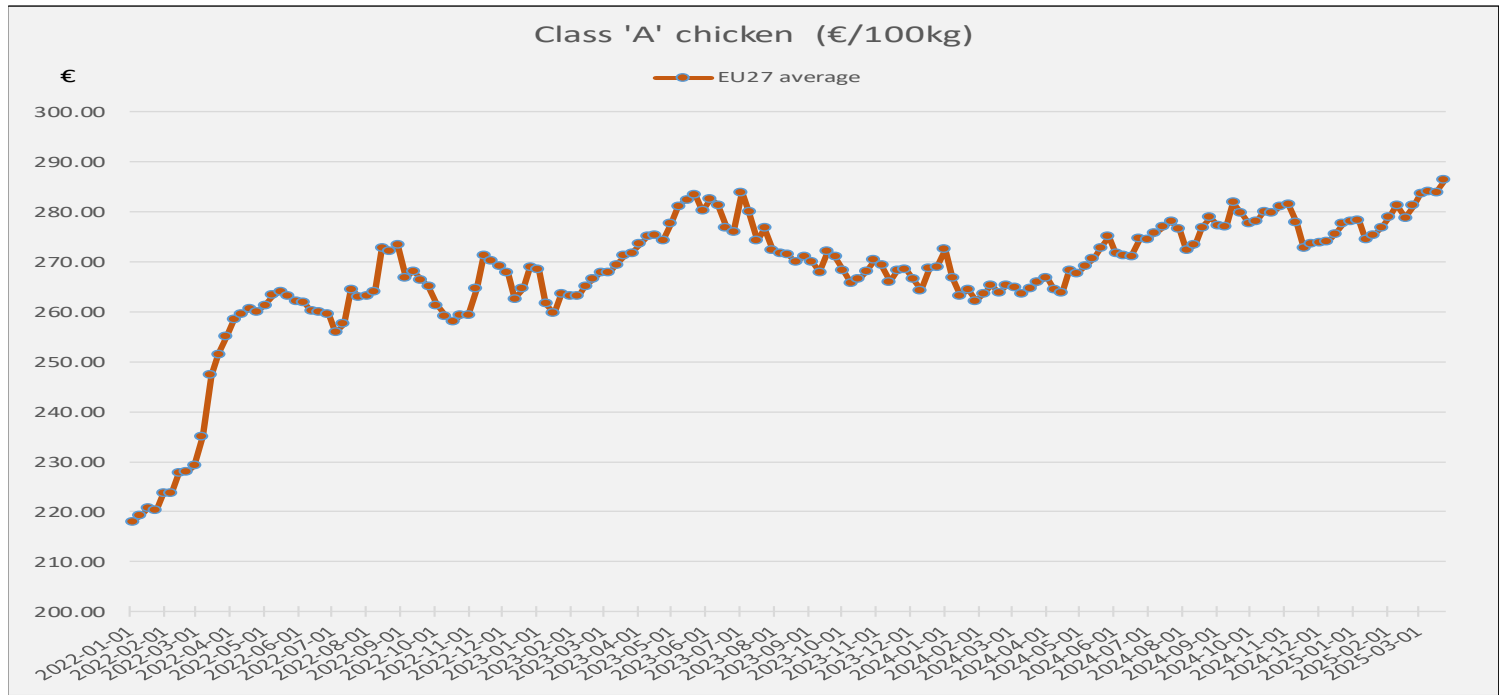
Week - 13	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	286.43	598.44	263.21

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 - 13 Class 'A' chicken



Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	286.43	+ 0.9%	+ 1.8%	+ 7.7%

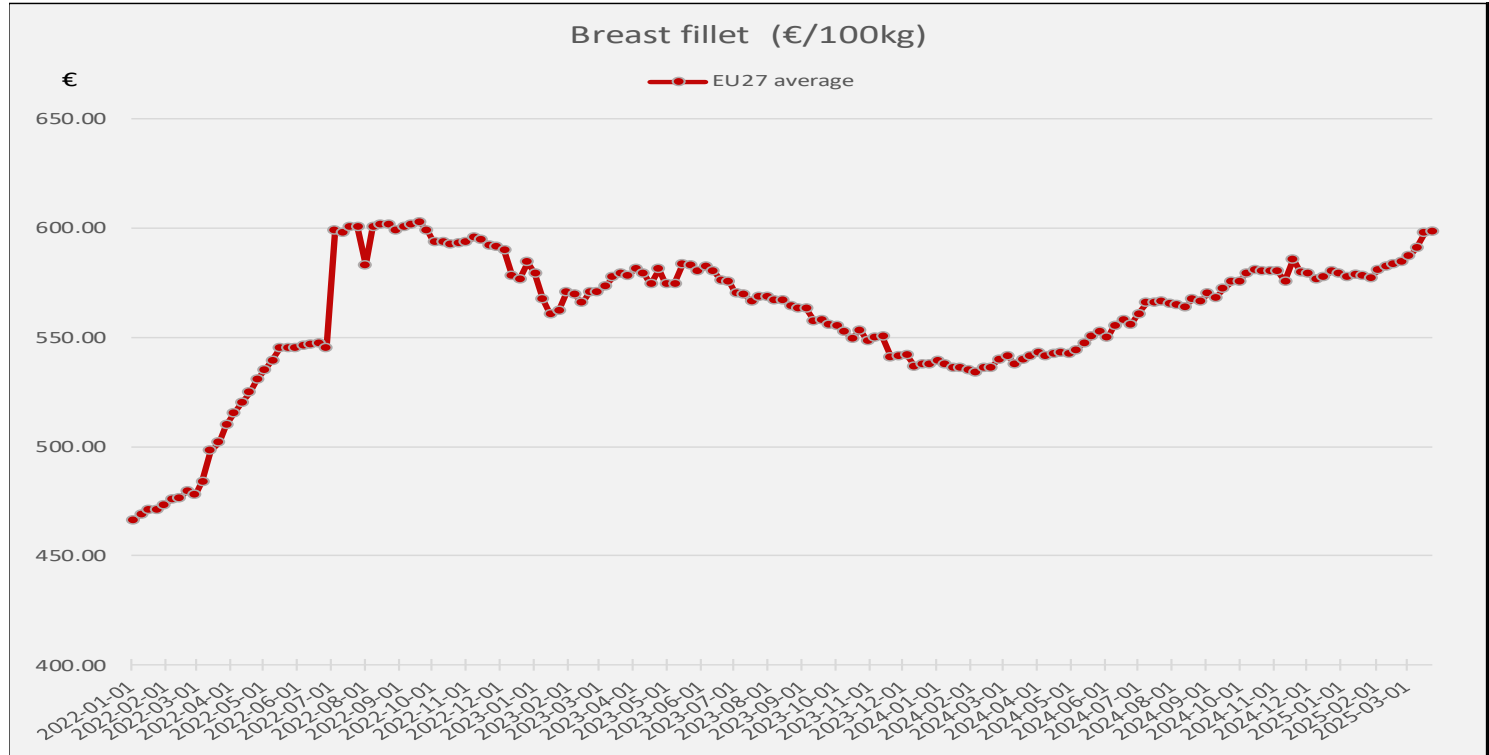
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
 ! Prices reported by MS are preliminary and may be subject to change !



Weekly price of 'Breast fillet'

Week - 13

Breast fillet



Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	598.44	+ 0.1%	+ 2.3%	+ 10.5%

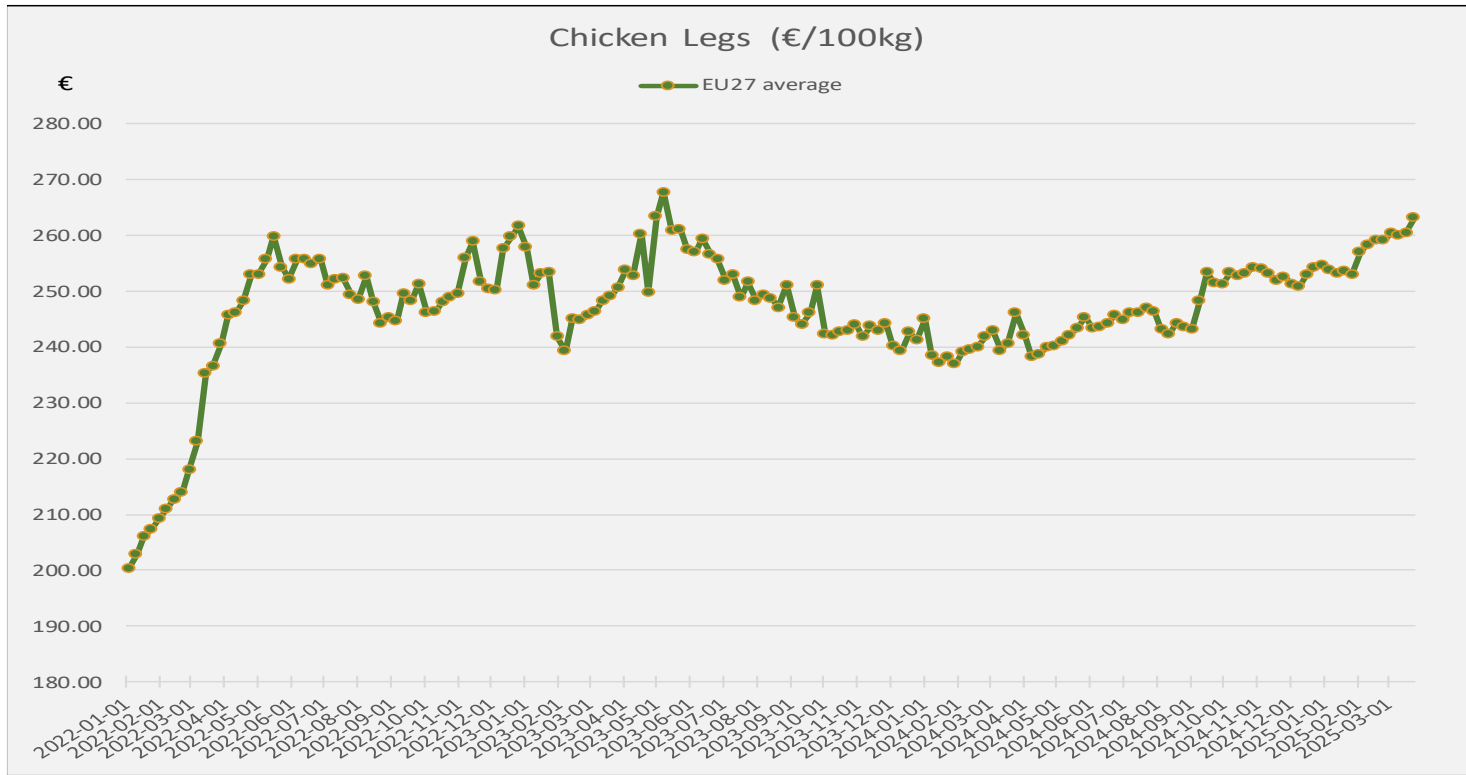
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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



Weekly price of 'Chicken legs'

Week - 13 Chicken Legs

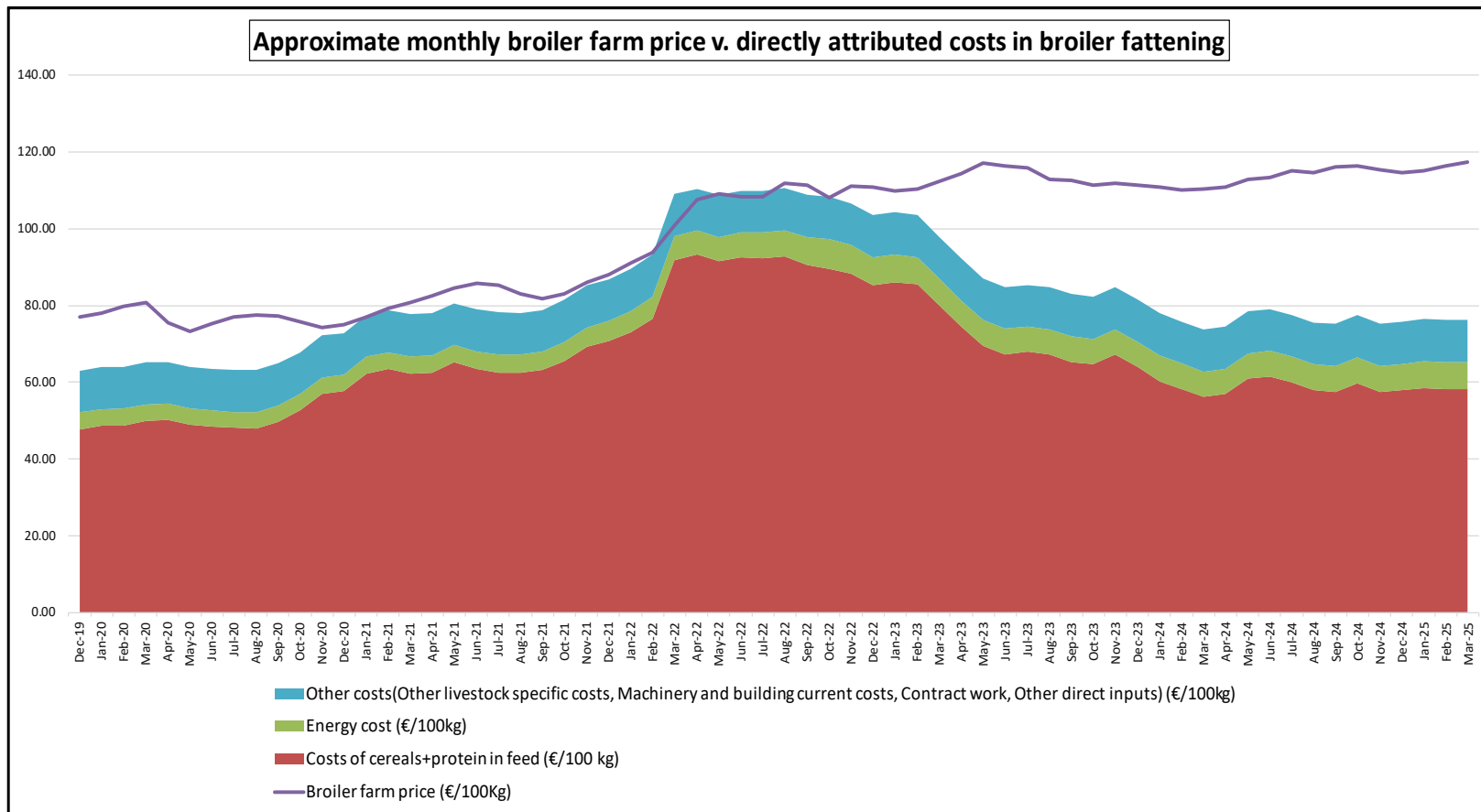


Week - 13	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	263.21	+ 1.0%	+ 1.6%	+ 6.9%

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

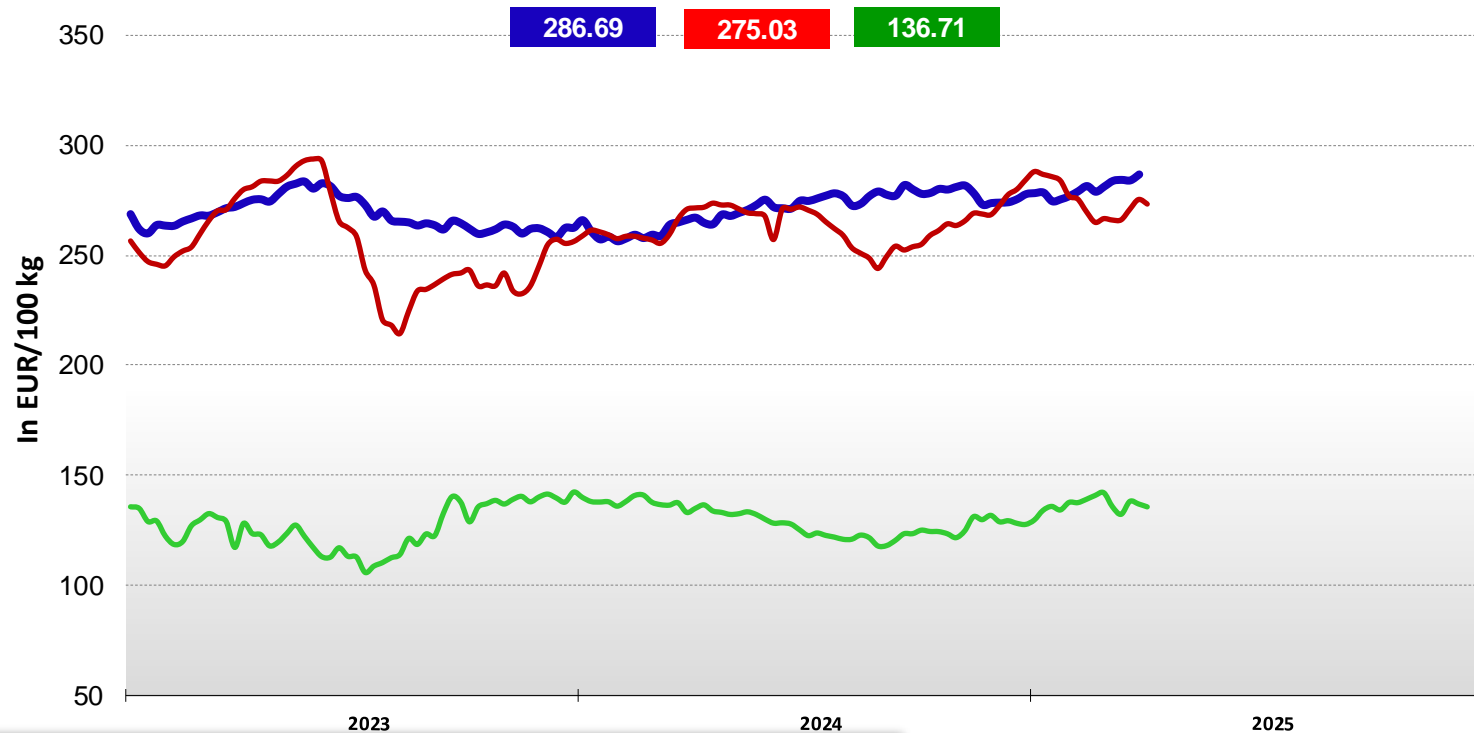


COST BROILER PRODUCTION



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'.

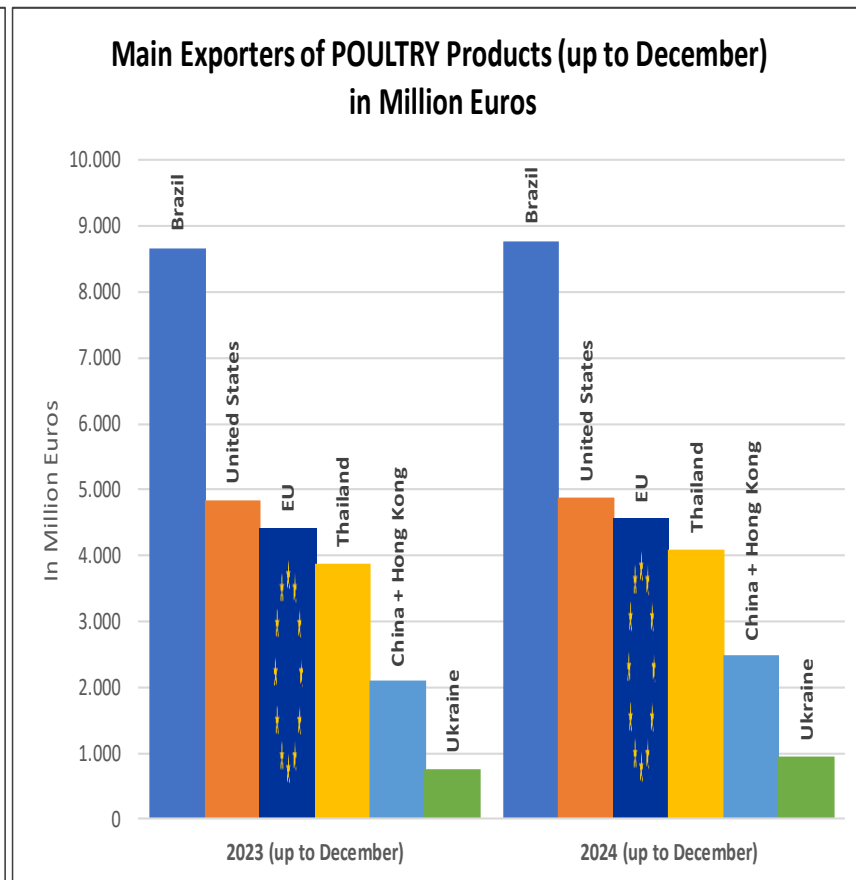
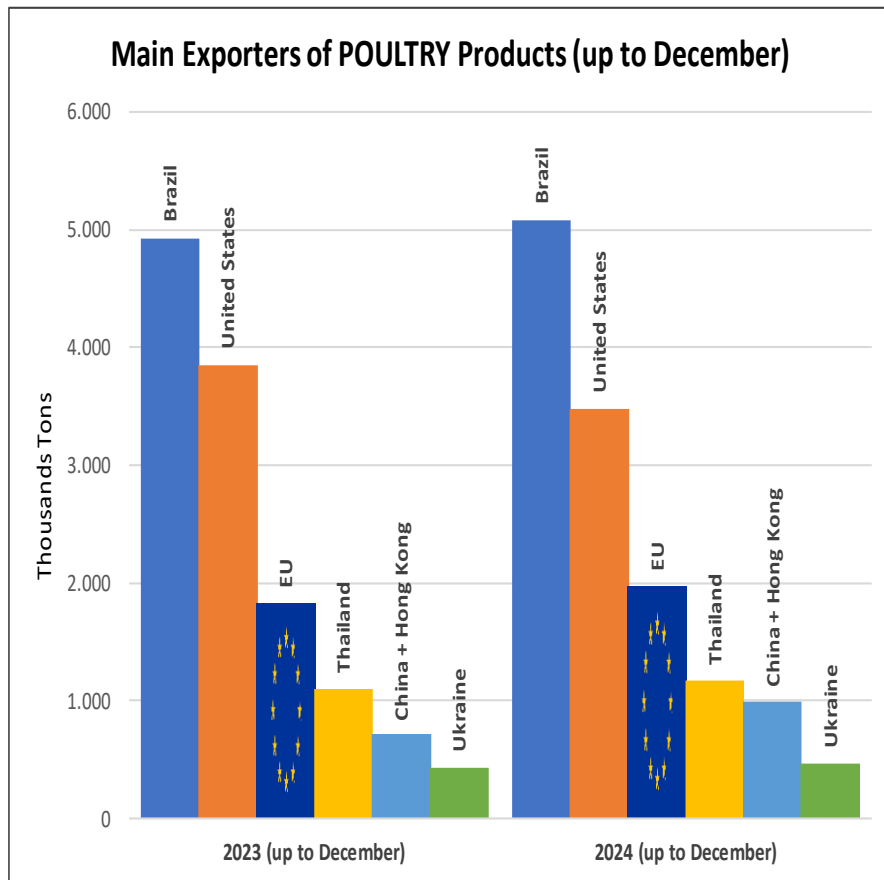
Broiler prices in EU, USA and Brazil



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

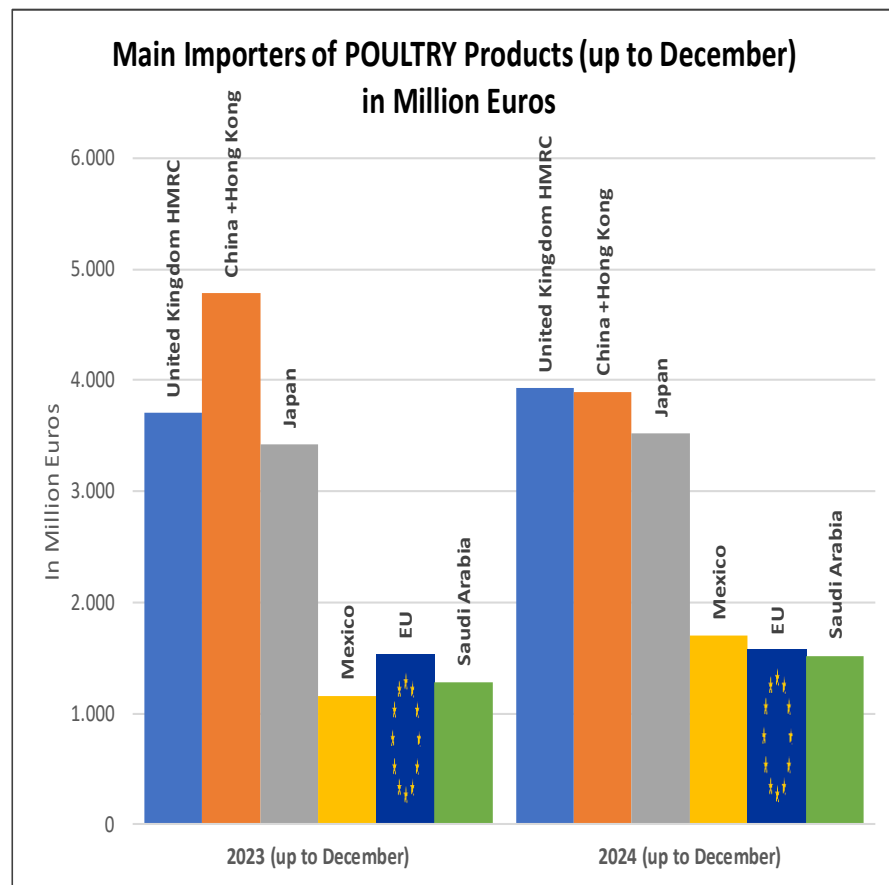
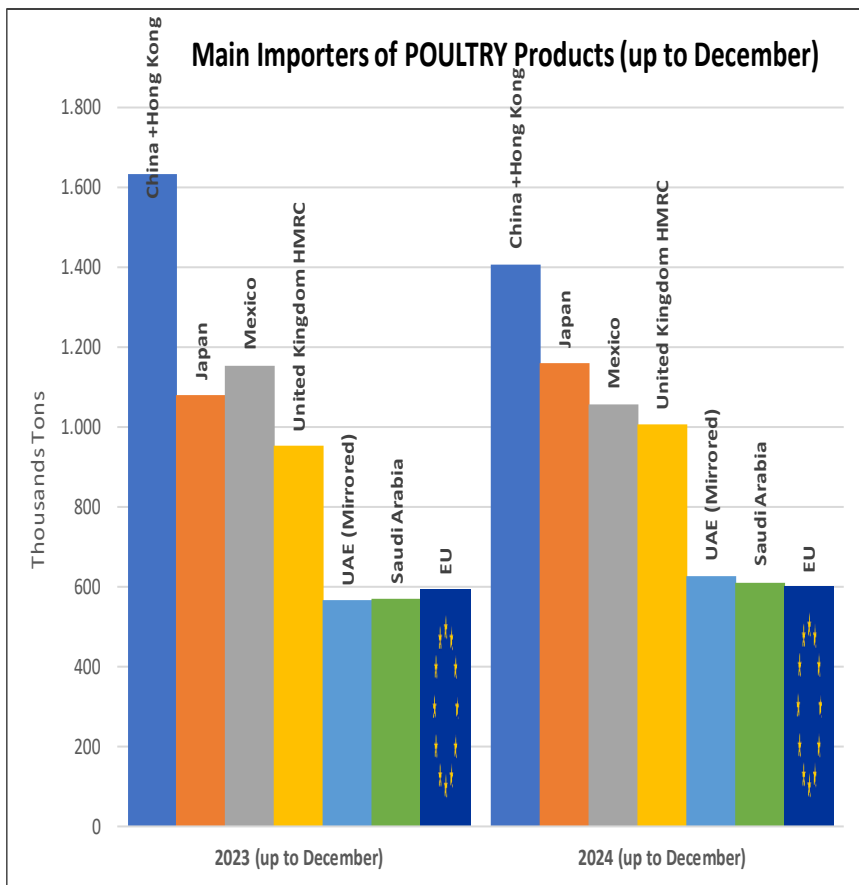
— EU — US — BR





Source: Trade Data Monitor





Source: Trade Data Monitor

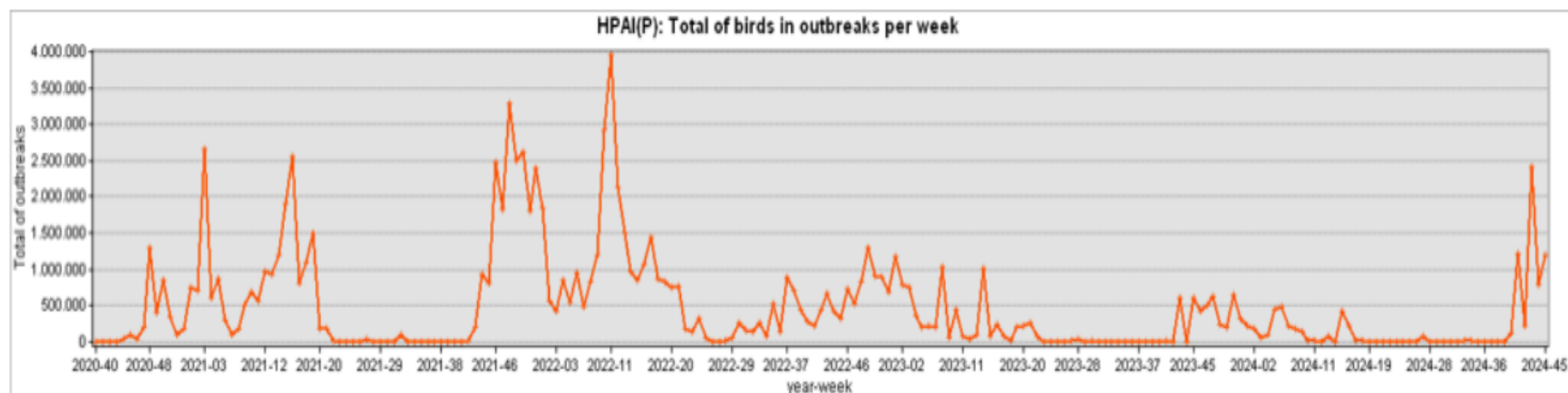


Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 07/04/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
PL	97	8,948,372	20.7%	46.6%
IT	56	4,255,764	12.0%	22.2%
HU	247	3,625,448	52.8%	18.9%
BG	9	530,562	1.9%	2.8%
SK	2	425,260	0.4%	2.2%
DE	22	294,308	4.7%	1.5%
LT	1	246,387	0.2%	1.3%
BE	3	244,136	0.6%	1.3%
NL	5	173,647	1.1%	0.9%
FR	9	162,372	1.9%	0.8%
AT	6	148,001	1.3%	0.8%
<i>Other MS</i>	11	132,777	2.4%	0.7%
Total	468	19,187,034	100.0%	100.0%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	27	2,667,295	5.8%	13.9%
Laying hen	56	9,462,400	12.0%	49.3%
Duck	178	2,626,062	38.0%	13.7%
Turkey	79	2,580,297	16.9%	13.4%
Goose	69	377,781	14.7%	2.0%
Pheasant	3	6,569	0.6%	0.0%
Mixed	15	64,653	3.2%	0.3%
No information	41	1,401,977	8.8%	7.3%
Total	468	19,187,034	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

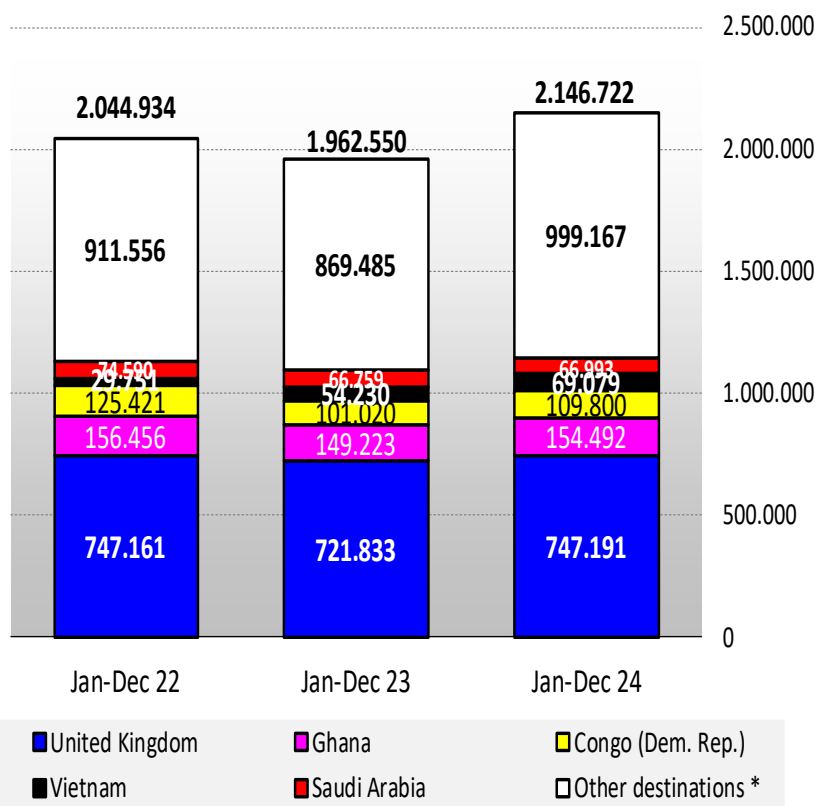
	2020		2021		2022		2023		Jan-Dec 24		Compared to Jan-Dec 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	811.675	32%	725.611	32%	747.161	37%	721.833	37%	747.191	34,8%	+ 3,5%
Ghana	213.838	8%	228.066	10%	156.456	8%	149.223	8%	154.492	7,2%	+ 3,5%
Congo (Dem. Rep.)	101.987	4%	139.852	6%	125.421	6%	101.020	5%	109.800	5,1%	+ 8,7%
Vietnam	50.977	2%	31.784	1%	29.751	1%	54.230	3%	69.079	3,2%	+ 27,4%
Saudi Arabia	74.407	3%	58.457	3%	74.590	4%	66.759	3%	66.993	3,1%	+ 0,4%
Ukraine	145.871	6%	162.267	7%	105.810	5%	84.639	4%	58.716	2,7%	- 30,6%
Philippines	195.884	8%	81.155	4%	6.421	0%	4.256	0%	55.769	2,6%	+++
Congo	28.551	1%	30.303	1%	35.562	2%	46.737	2%	55.412	2,6%	+ 18,6%
Uzbekistan	15.520	1%	32.390	1%	34.474	2%	44.900	2%	50.726	2,4%	+ 13,0%
Benin	61.472	2%	64.358	3%	63.516	3%	61.286	3%	43.794	2,0%	- 28,5%
<i>Other Destinations</i>	<i>820.569</i>	<i>33%</i>	<i>698.130</i>	<i>31%</i>	<i>665.772</i>	<i>33%</i>	<i>627.667</i>	<i>32%</i>	<i>734.750</i>	<i>34,2%</i>	
Extra-EU	2.520.753		2.252.374		2.044.934		1.962.550		2.146.722		
% change			- 11%		- 9%		- 4%		+ 9,4%		

EU-27 Exports of poultry meat to selected destinations

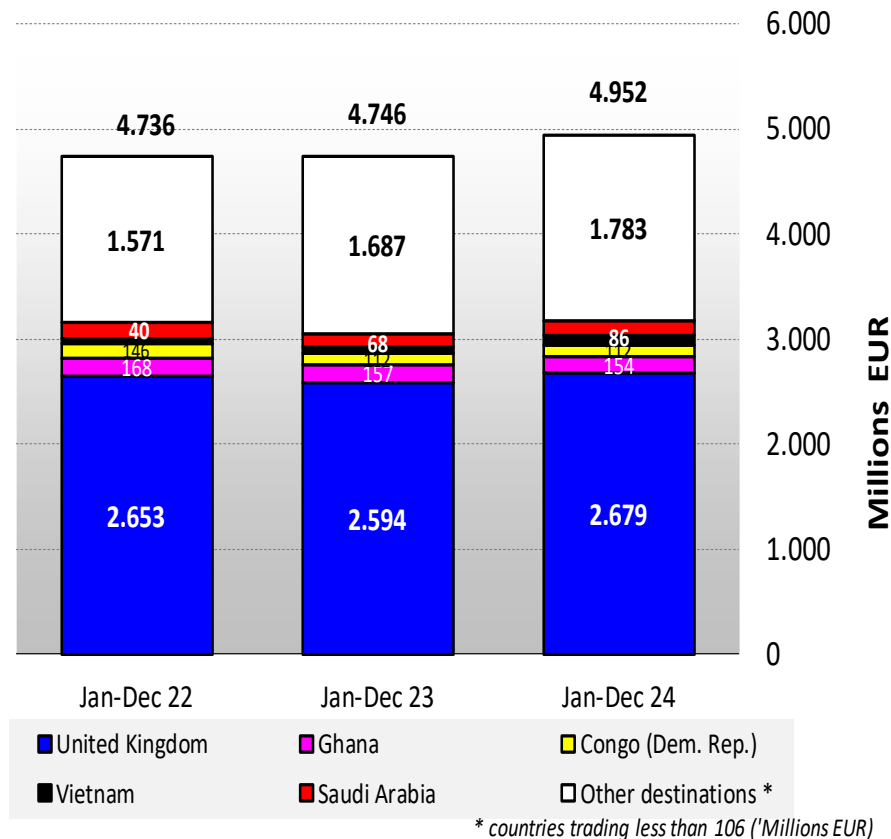
	2020		2021		2022		2023		Jan-Dec 24		Compared to Jan-Dec 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	1.981.927	51%	2.009.674	51%	2.652.567	68%	2.593.946	66%	2.678.668	68,3%	+ 3,3%
Ghana	172.363	4%	224.103	6%	167.715	4%	156.970	4%	153.988	3,9%	- 1,9%
Congo (Dem. Rep.)	81.033	2%	116.553	3%	145.766	4%	112.110	3%	112.142	2,9%	+ 0,0%
Vietnam	55.251	1%	35.592	1%	39.533	1%	67.641	2%	86.150	2,2%	+ 27,4%
Saudi Arabia	104.518	3%	93.283	2%	159.672	4%	128.754	3%	138.371	3,5%	+ 7,5%
Ukraine	100.109	3%	119.533	3%	102.729	3%	125.678	3%	106.345	2,7%	- 15,4%
Philippines	86.502	2%	57.220	1%	7.793	0%	6.571	0%	34.778	0,9%	+++
Congo	23.311	1%	26.636	1%	36.276	1%	42.776	1%	47.476	1,2%	+ 11,0%
Uzbekistan	14.952	0%	23.945	1%	27.742	1%	35.602	1%	35.388	0,9%	- 0,6%
Benin	64.292	2%	87.264	2%	106.959	3%	103.984	3%	60.680	1,5%	- 41,6%
<i>Other Destinations</i>	<i>1.235.798</i>	<i>32%</i>	<i>1.178.552</i>	<i>30%</i>	<i>1.289.575</i>	<i>33%</i>	<i>1.372.204</i>	<i>35%</i>	<i>1.498.219</i>	<i>38,2%</i>	
Extra-EU	3.920.057		3.972.355		4.736.325		4.746.236		4.952.205		
% change			+ 1%		+ 19%		+ 0%		+ 4,3%		

EU-27 poultry meat exports (by destination)

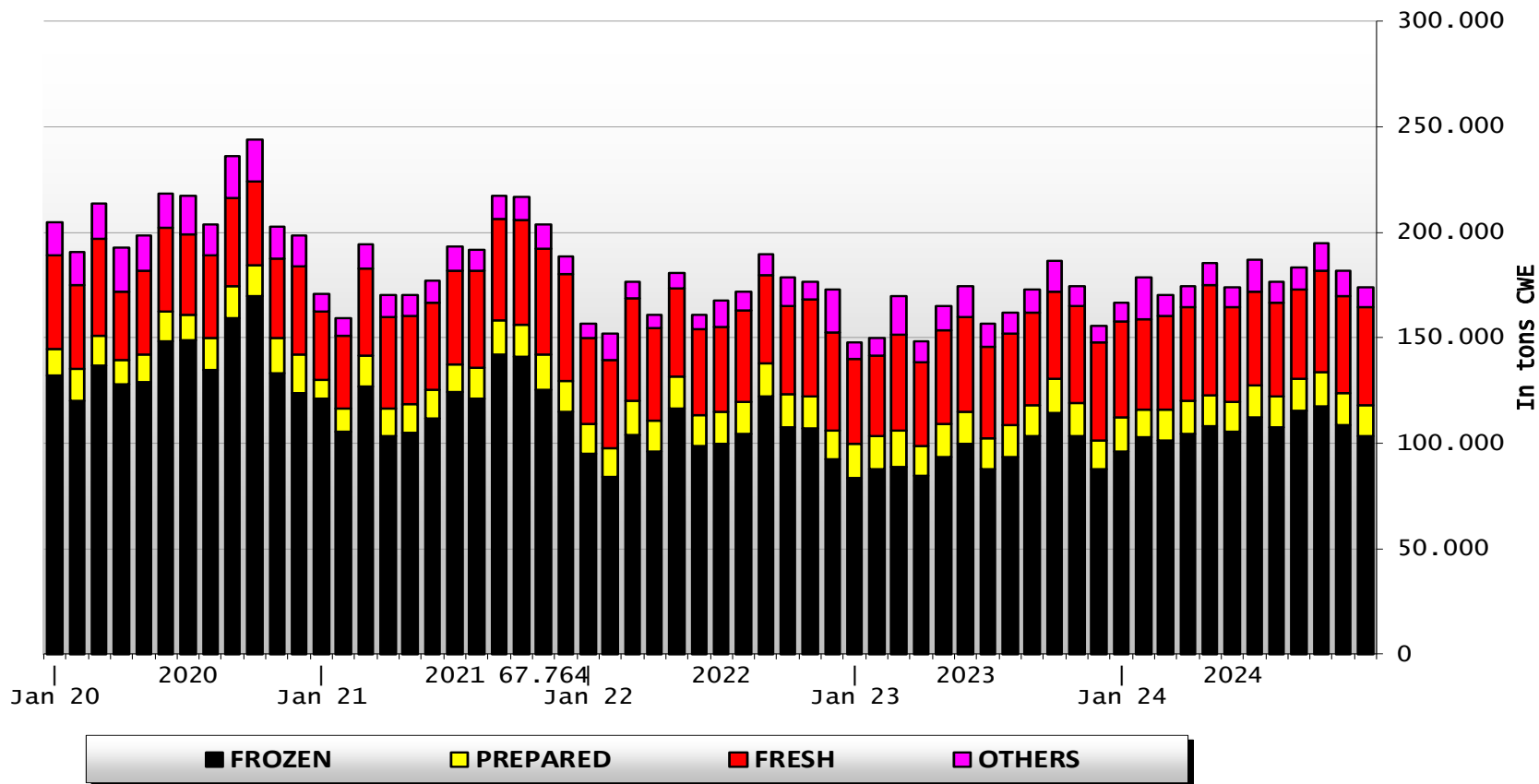
EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



Exports of selected Poultry products

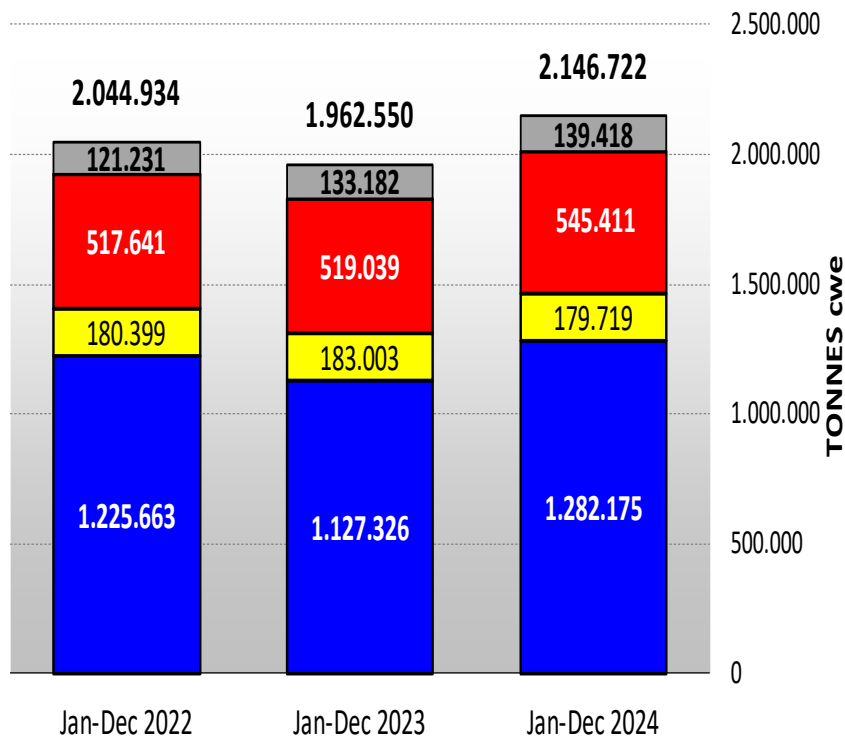


EU Market Situation for Poultry



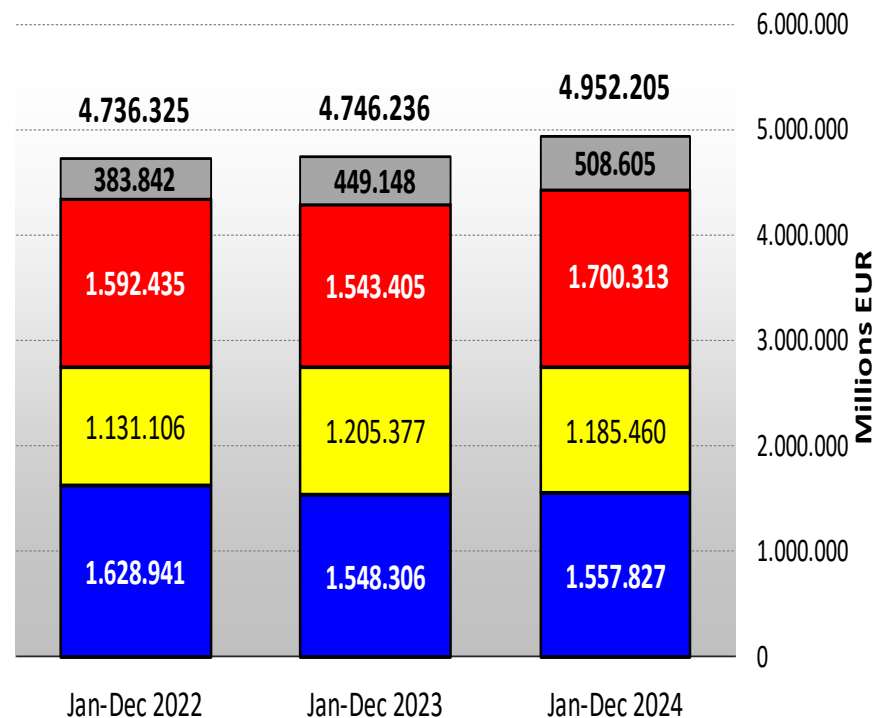
EU-27 poultry meat exports (by meat type)

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

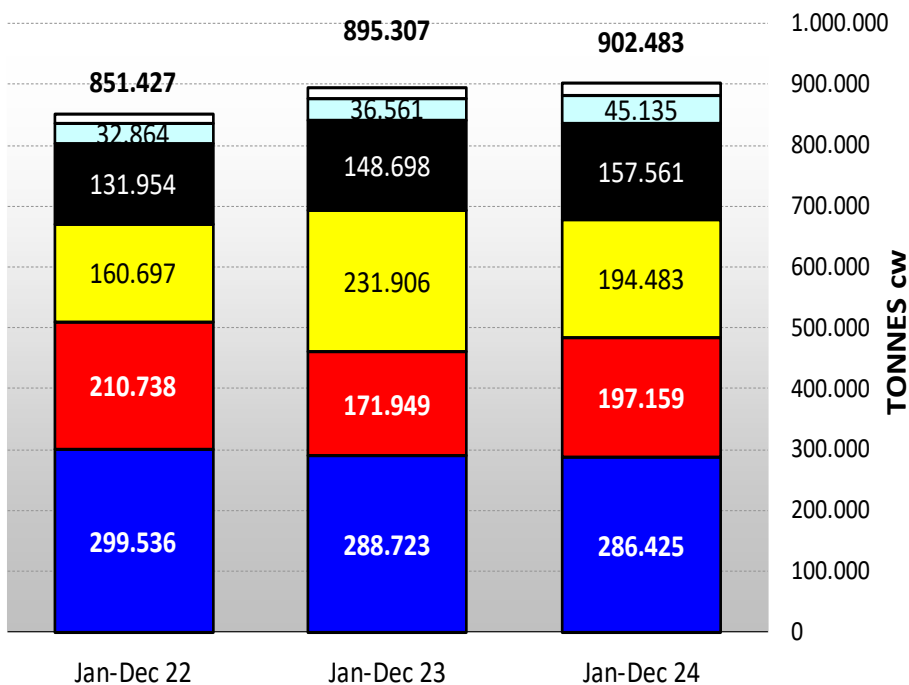
	2020		2021		2022		2023		Jan-Dec 24		Compared to Jan-Dec 23
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	227.738	28%	251.887	32%	299.536	35%	288.723	32%	286.425	31,7%	- 0,8%
United Kingdom	293.914	37%	274.667	34%	210.738	25%	171.949	19%	197.159	21,8%	+ 14,7%
Ukraine	108.669	14%	102.892	13%	160.697	19%	231.906	26%	194.483	21,5%	- 16,1%
Thailand	131.374	16%	130.658	16%	131.954	15%	148.698	17%	157.561	17,5%	+ 6,0%
China	17.017	2%	20.916	3%	32.864	4%	36.561	4%	45.135	5,0%	+ 23,5%
Argentina	3.273	0%	3.151	0%	4.096	0%	4.079	0%	6.704	0,7%	+ 64,4%
Bosnia-Herz.	979	0%	1.608	0%	3.000	0%	2.889	0%	3.925	0,4%	+ 35,8%
<i>Other Destinations</i>	21.807	3%	11.279	1%	8.541	1%	10.503	1%	11.091	1,2%	
Extra-EU	804.772		797.056		851.427		895.307		902.483		
% change			- 1%		+ 7%		+ 5%		+ 0,8%		

EU-27 Imports of poultry meat from selected origins

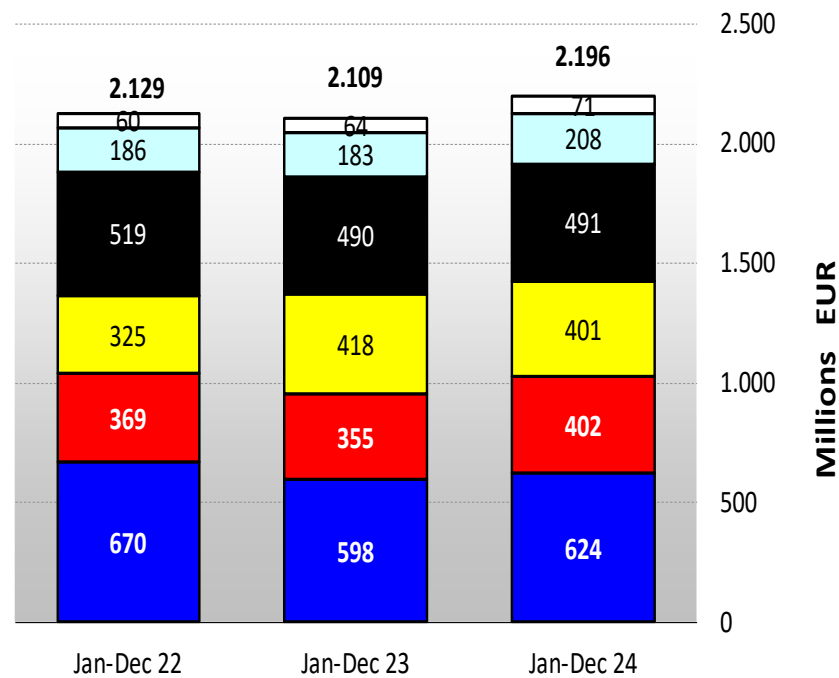
	2020		2021		2022		2023		Jan-Dec 24		Compared to Jan-Dec 23
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	351.277	24%	388.472	29%	669.772	31%	598.220	28%	623.600	28,4%	+ 4,2%
United Kingdom	501.768	34%	327.273	24%	369.160	17%	354.848	17%	402.047	18,3%	+ 13,3%
Ukraine	132.740	9%	166.208	12%	324.836	15%	418.449	20%	400.671	18,2%	- 4,2%
Thailand	316.860	22%	317.487	24%	519.175	24%	490.197	23%	491.363	22,4%	+ 0,2%
China	78.298	5%	95.081	7%	186.175	9%	183.071	9%	207.740	9,5%	+ 13,5%
Argentina	6.515	0%	6.508	0%	11.463	1%	11.360	1%	16.056	0,7%	+ 41,3%
Bosnia-Herz.	7.809	1%	10.345	1%	10.728	1%	9.362	0%	17.175	0,8%	+ 83,5%
Chile	35.557	2%	6.019	0%	1.537	0%	7.254	0%	7.910	0,4%	+ 9,0%
Norway	5.280	0%	7.914	1%	8.286	0%	8.888	0%	10.538	0,5%	+ 18,6%
Switzerland	6.229	0%	5.300	0%	8.975	0%	6.730	0%	6.205	0,3%	- 7,8%
<i>Other Destinations</i>	16.429	1%	15.466	1%	18.949	1%	20.191	1%	12.997	0,6%	
Extra-EU	1.458.760		1.346.074		2.129.057		2.108.569		2.196.301		
% change			- 8%		+ 58%		- 1%		+ 4,2%		

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (Millions EUR)

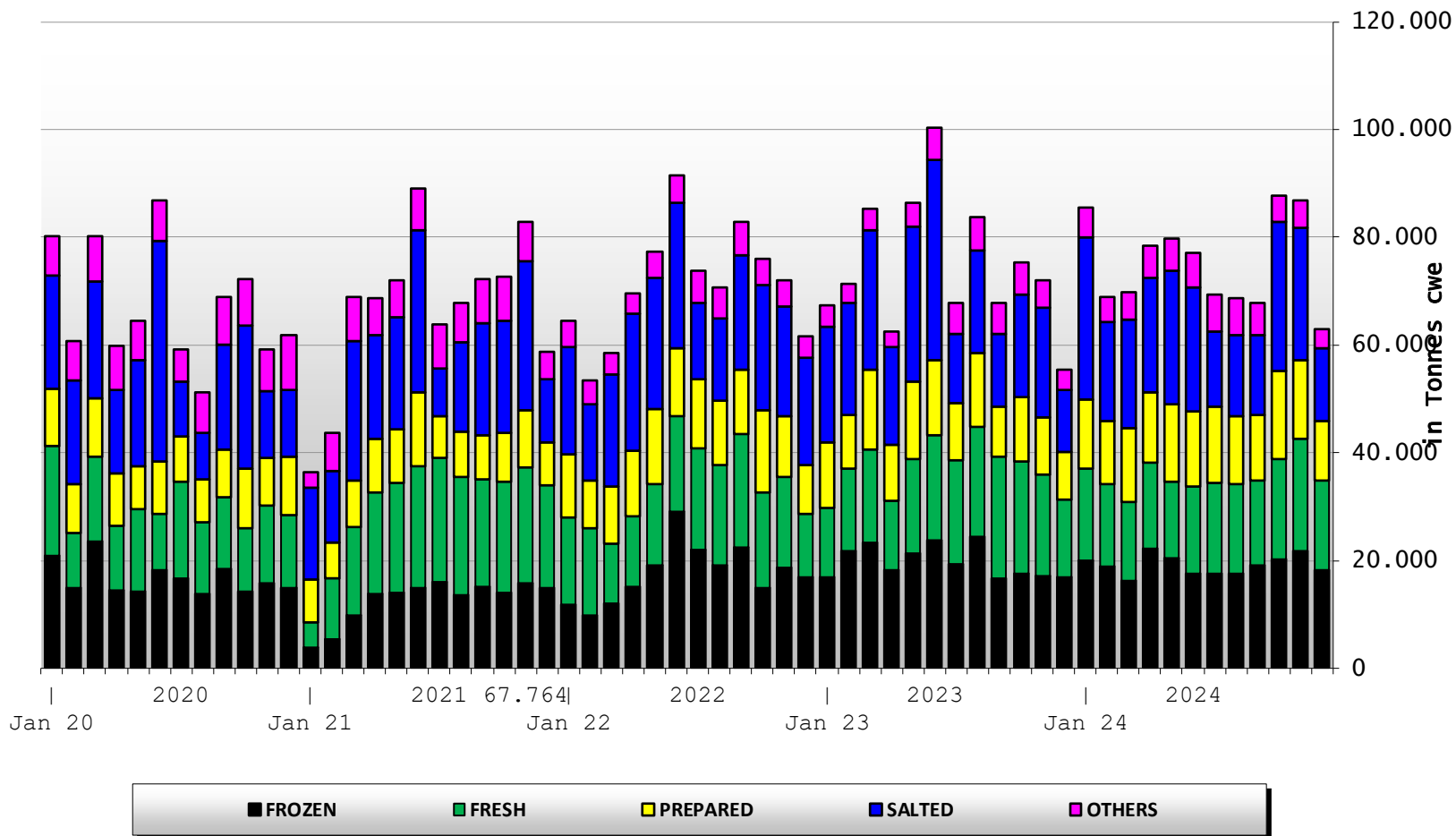


■ Brazil ■ United Kingdom ■ Ukraine ■ Thailand ■ China ■ Other destinations

■ Brazil ■ United Kingdom ■ Ukraine ■ Thailand ■ China ■ Other destinations



Imports of selected Poultry products

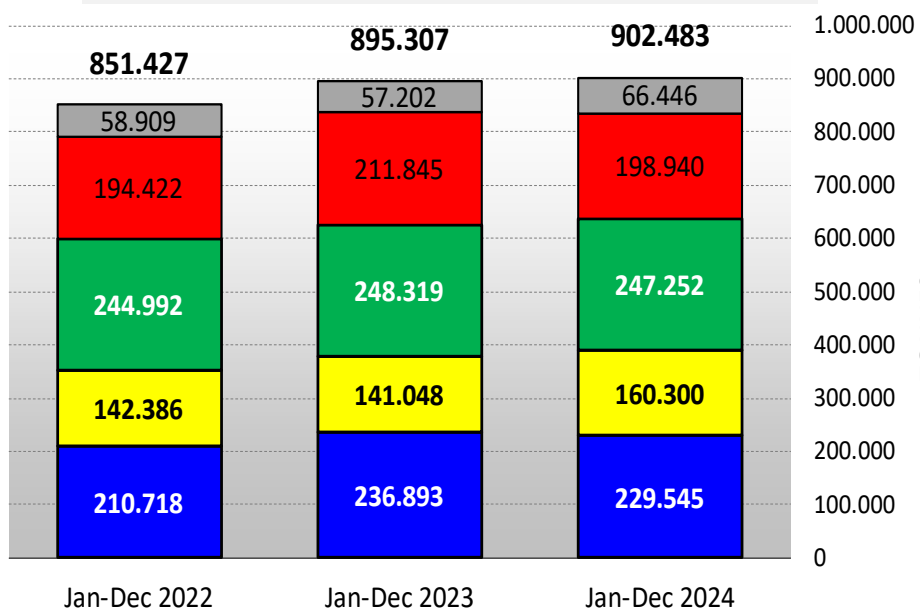


EU Market Situation for Poultry



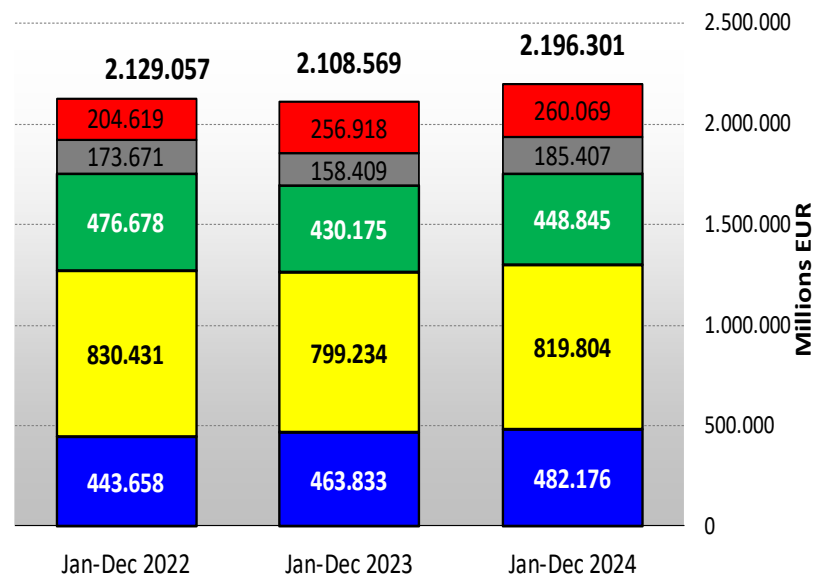
EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)

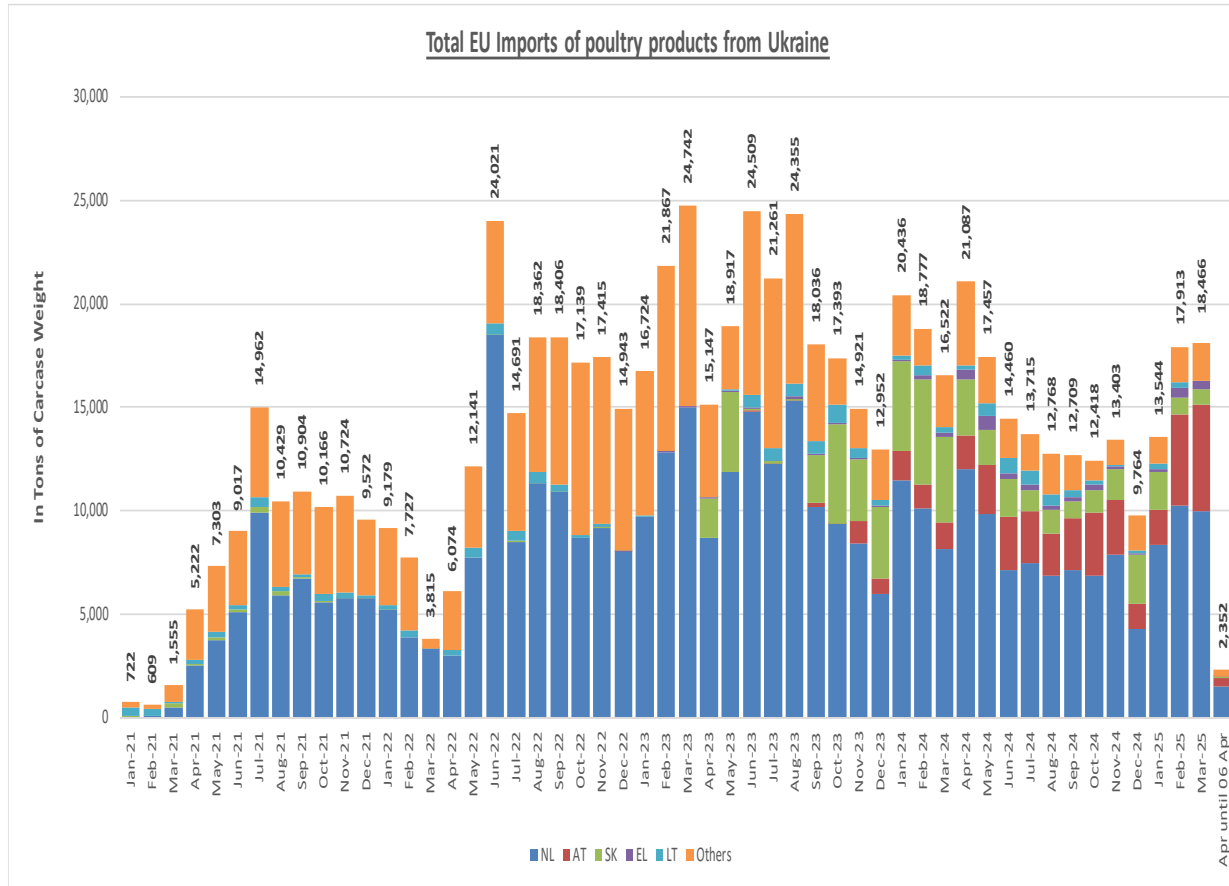


■ FROZEN ■ PREPARED ■ SALTED ■ FRESH ■ OTHERS

EU IMPORTS of Poultry Meat (Millions EUR)



■ FROZEN ■ PREPARED ■ SALTED ■ OTHERS ■ FRESH



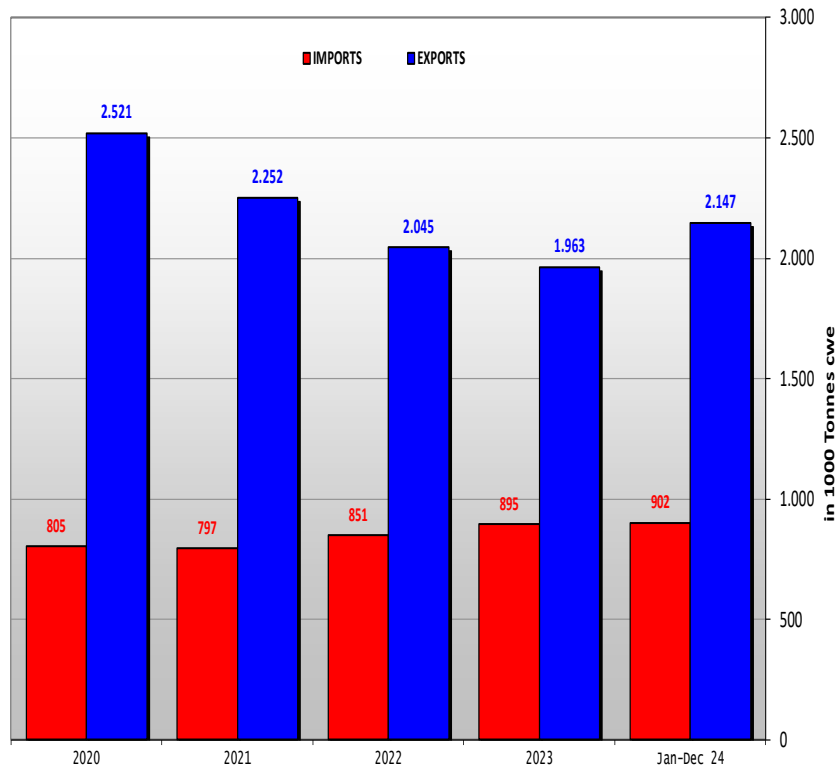
	2022	2023	2024	2025 (until 06 Apr)
Poultry				
EU total	187,968	230,826	183,516	52,275
NL	98,192	134,424	99,124	30,057
SK	131	19,456	27,610	3,484
AT	0	2,186	24,530	11,634
RO	1,627	3,947	7,655	149
PL	38,127	26,862	4,943	1,080
LT	3,455	4,282	4,439	897
CZ	527	971	3,357	362
EL	112	769	3,103	1,119
ES	0	1,895	2,140	825
DE	717	158	1,779	458
BG	23	67	1,470	781
IT	257	797	1,097	864
CY	98	140	1,094	214
FR	66	473	491	0
EE	1	88	320	140
HU	20,565	34,055	261	122
BE	0	98	55	23
PT	0	0	49	66
FI	0	0	0	0
LV	0	105	0	0
IE	0	31	0	0
SE	15	22	0	0



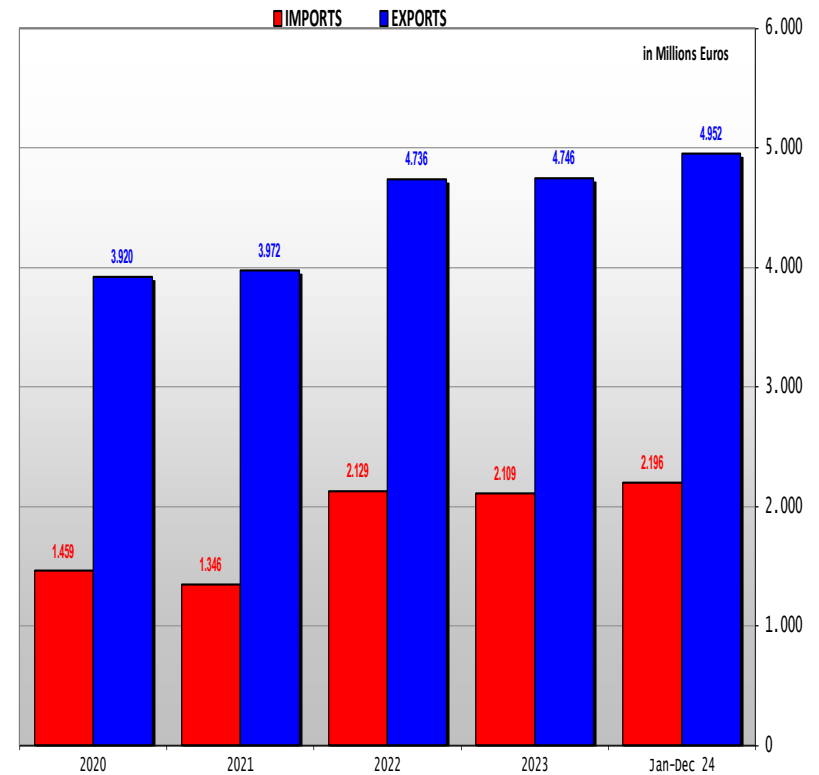
TRADE

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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