

EU Market Situation for Poultry

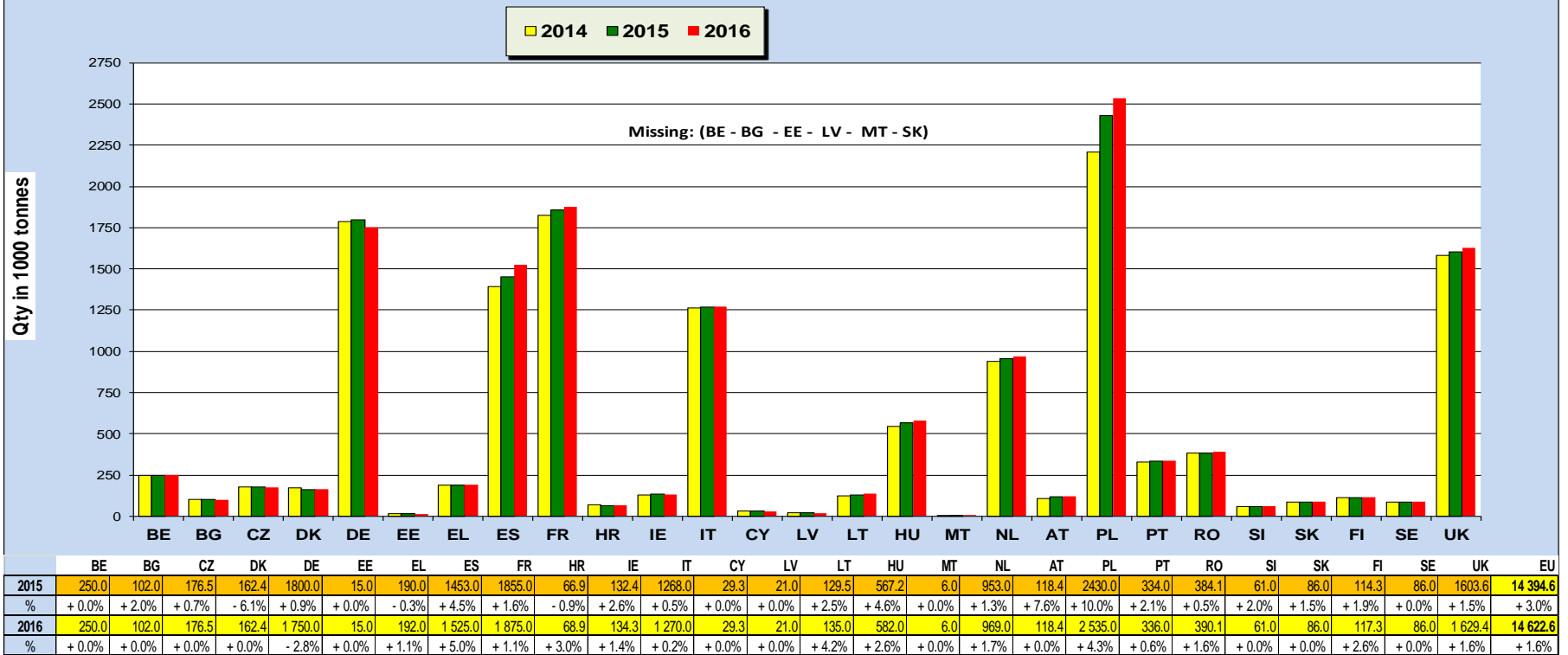
Civil Dialogue Group

07 October 2015



Experts EU production forecast of Poultry Meat

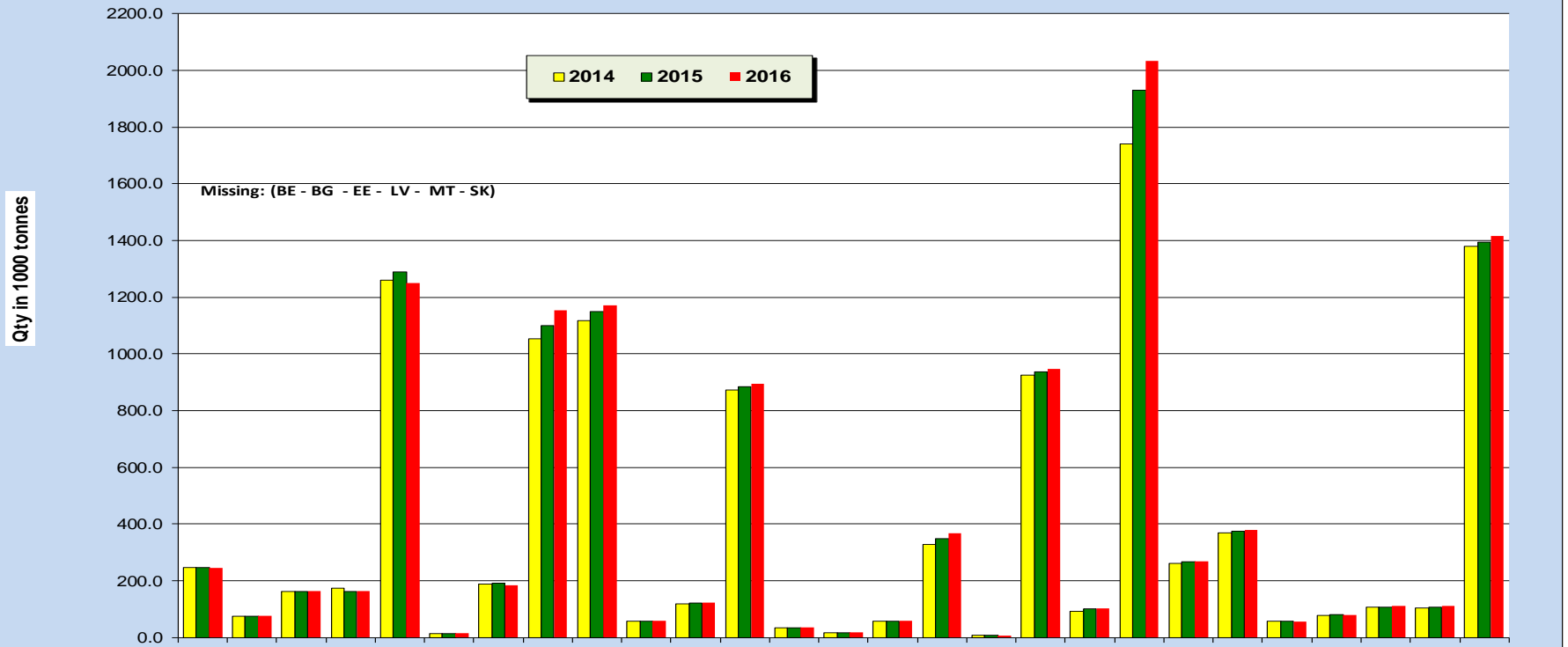
2015: 14 394.6 th T (+ 3.0 %) & 2016: 14 622 thT (+ 1.6 %)



Source: According to the data sent by the experts of the forecast group

Experts EU production forecast of Broiler Meat

2015: 11 271.3 th T (+3,5 %) & 2016: 11 484.5 thT (+ 1,9 %)



	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	246.0	75.0	162.0	162.0	1290.0	13.8	190.0	1100.0	1149.0	55.7	120.0	885.0	35.0	17.0	58.5	349.1	7.4	936.0	102.1	1930.0	267.0	375.0	56.0	80.1	107.0	108.0	1394.6	11 271.3
%	+ 0.0%	+ 1.4%	+ 0.6%	- 6.1%	+ 2.4%	+ 0.0%	+ 1.1%	+ 4.5%	+ 2.9%	- 3.0%	+ 1.7%	+ 1.5%	+ 0.0%	+ 0.0%	+ 0.0%	+ 6.1%	+ 0.0%	+ 1.1%	+ 12.2%	+ 10.9%	+ 2.1%	+ 1.4%	+ 0.4%	+ 1.5%	+ 0.9%	+ 4.9%	+ 1.2%	+ 3.5%
2016	246.0	75.0	162.0	162.0	1 250.0	13.8	185.0	1 155.0	1 172.0	57.4	122.0	895.0	35.0	17.0	58.5	366.0	7.4	948.0	102.1	2 033.0	269.0	380.0	56.0	80.1	110.0	111.0	1 416.2	11 484.5
%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	- 3.1%	+ 0.0%	- 2.6%	+ 5.0%	+ 2.0%	+ 3.1%	+ 1.7%	+ 1.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 4.8%	+ 0.0%	+ 1.3%	+ 0.0%	+ 5.3%	+ 0.7%	+ 1.3%	+ 0.0%	+ 0.0%	+ 2.8%	+ 2.8%	+ 1.5%	+ 1.9%

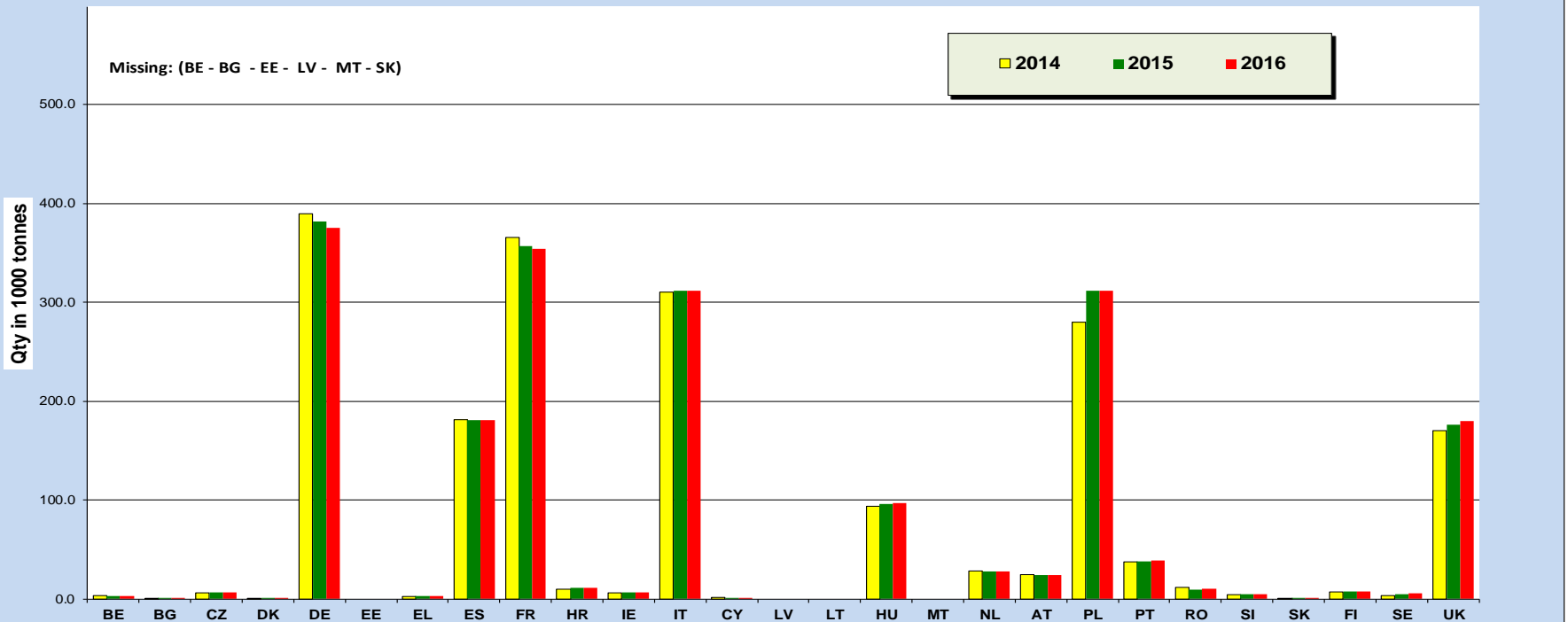
Source: According to the data sent by the experts of the forecast group



European Commission

Experts EU production forecast of Turkey Meat

2015: 1 966.0 th T (+ 1.5 %) & 2016: 1 961.8 th T (- 0.2 %)

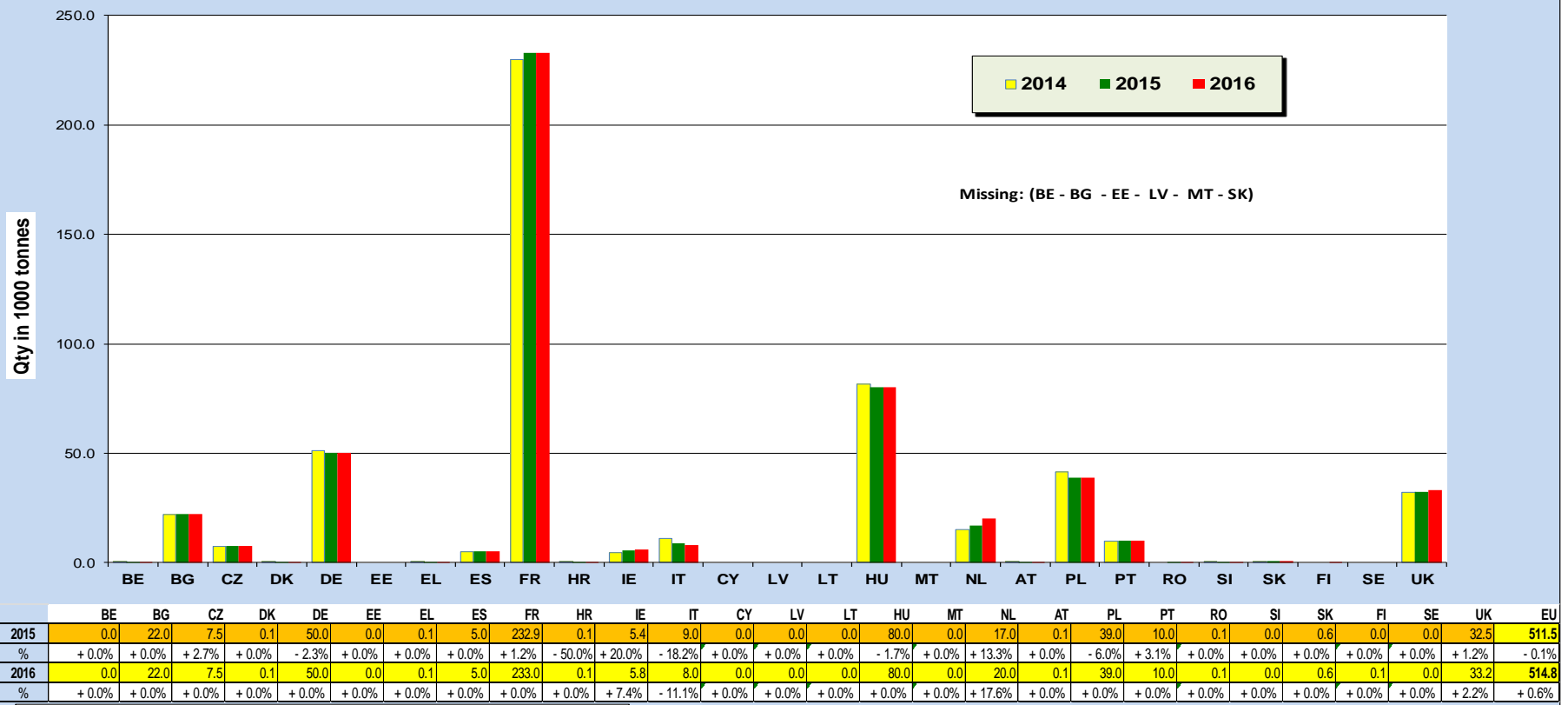


	BE	BG	CZ	DK	DE	EE	EL	ES	FR	HR	IE	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	EU
2015	3.3	0.1	6.5	0.3	382.0	0.0	2.5	181.0	357.0	11.0	7.0	312.0	1.2	0.0	0.0	96.3	0.0	28.0	24.5	312.0	38.0	9.0	4.6	1.0	7.3	5.0	176.4	1 966.0
%	+0.0%	+0.0%	+3.2%	+0.0%	-2.0%	+0.0%	+0.0%	+0.0%	-2.4%	+13.4%	+7.7%	+0.6%	+0.0%	+0.0%	+0.0%	+3.2%	+0.0%	+0.0%	+0.0%	+11.4%	+1.6%	-25.0%	+0.0%	+0.0%	+1.4%	+47.1%	+3.8%	+1.5%
2016	3.3	0.1	6.5	0.3	375.0	0.0	2.5	181.0	354.0	11.3	6.5	312.0	1.2	0.0	0.0	96.5	0.0	28.0	24.5	312.0	39.0	10.0	4.6	1.0	7.3	5.3	179.9	1 961.8
%	+0.0%	+0.0%	+0.0%	+0.0%	-1.8%	+0.0%	+0.0%	+0.0%	-0.8%	+2.7%	-7.1%	+0.0%	+0.0%	+0.0%	+0.0%	+0.2%	+0.0%	+0.0%	+0.0%	+0.0%	+2.6%	+11.1%	+0.0%	+0.0%	+0.0%	+6.0%	+2.0%	-0.2%

Source: According to the data sent by the experts of the forecast group

Experts EU production forecast of Duck Meat

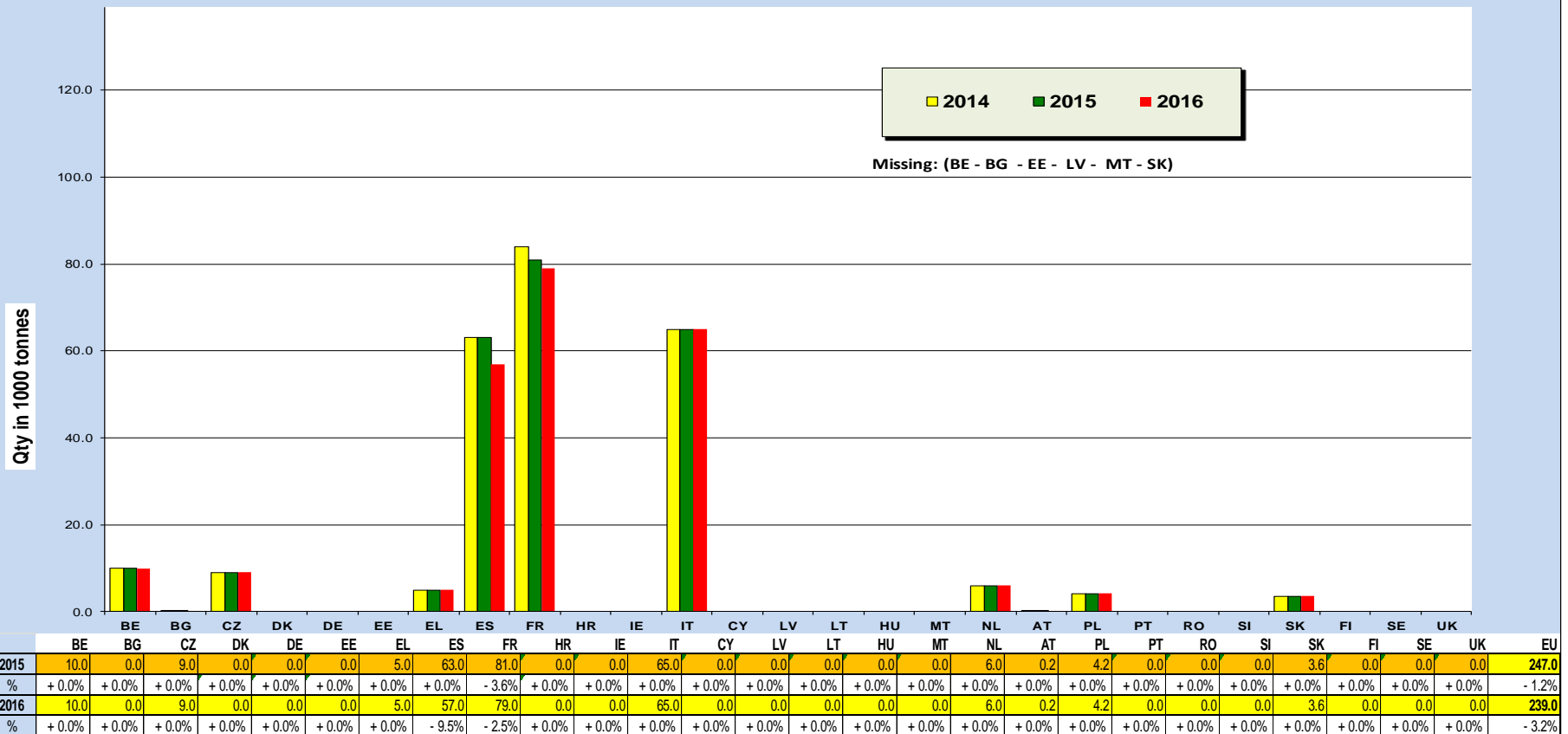
2015: 511.5 th T (- 0.1 %) & 2016: 514.8 thT (+ 0.6 %)



Source: According to the data sent by the experts of the forecast group

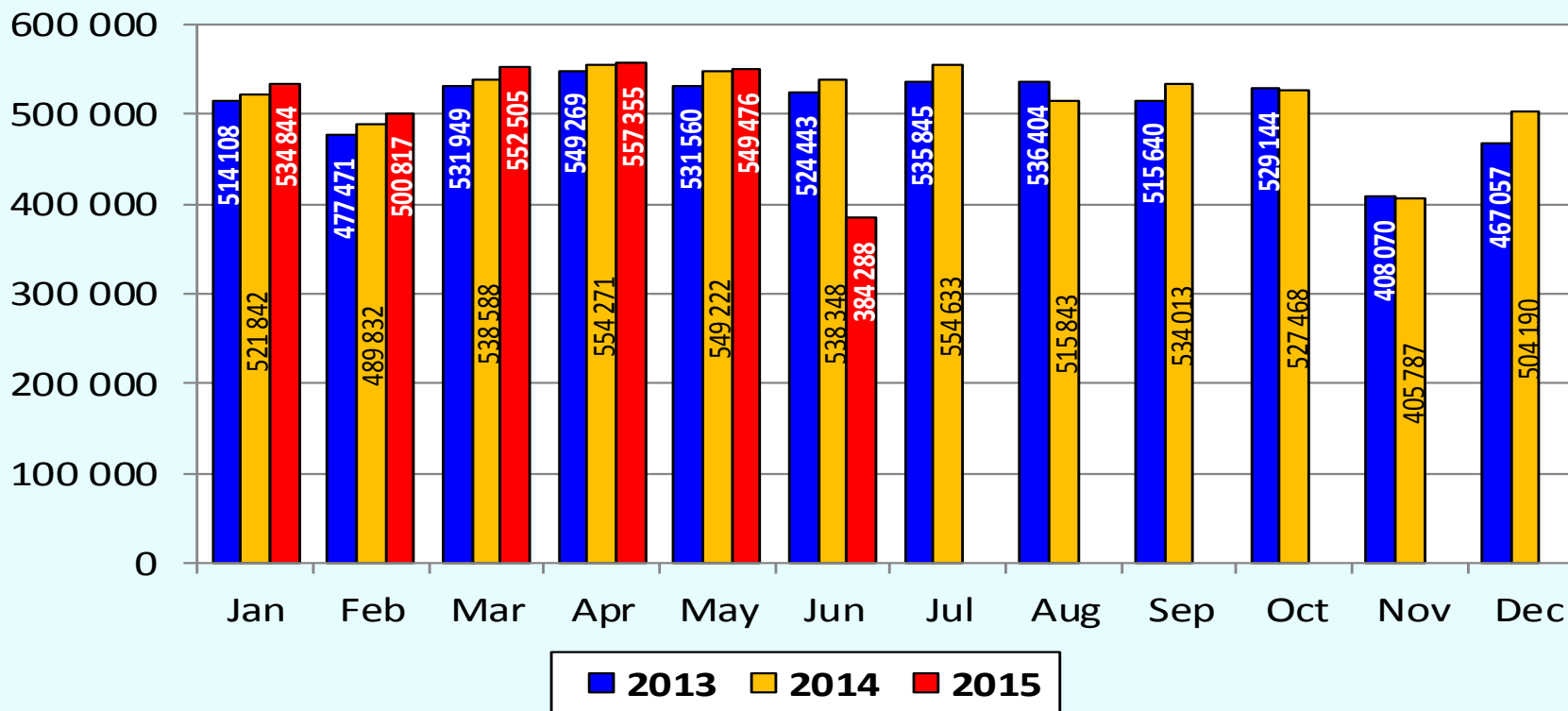
Experts EU production forecast of Rabbit Meat

2015: 247 th T (- 1.2 %) & 2016: 239 thT (- 3.2 %)



Source: According to the data sent by the experts of the forecast group

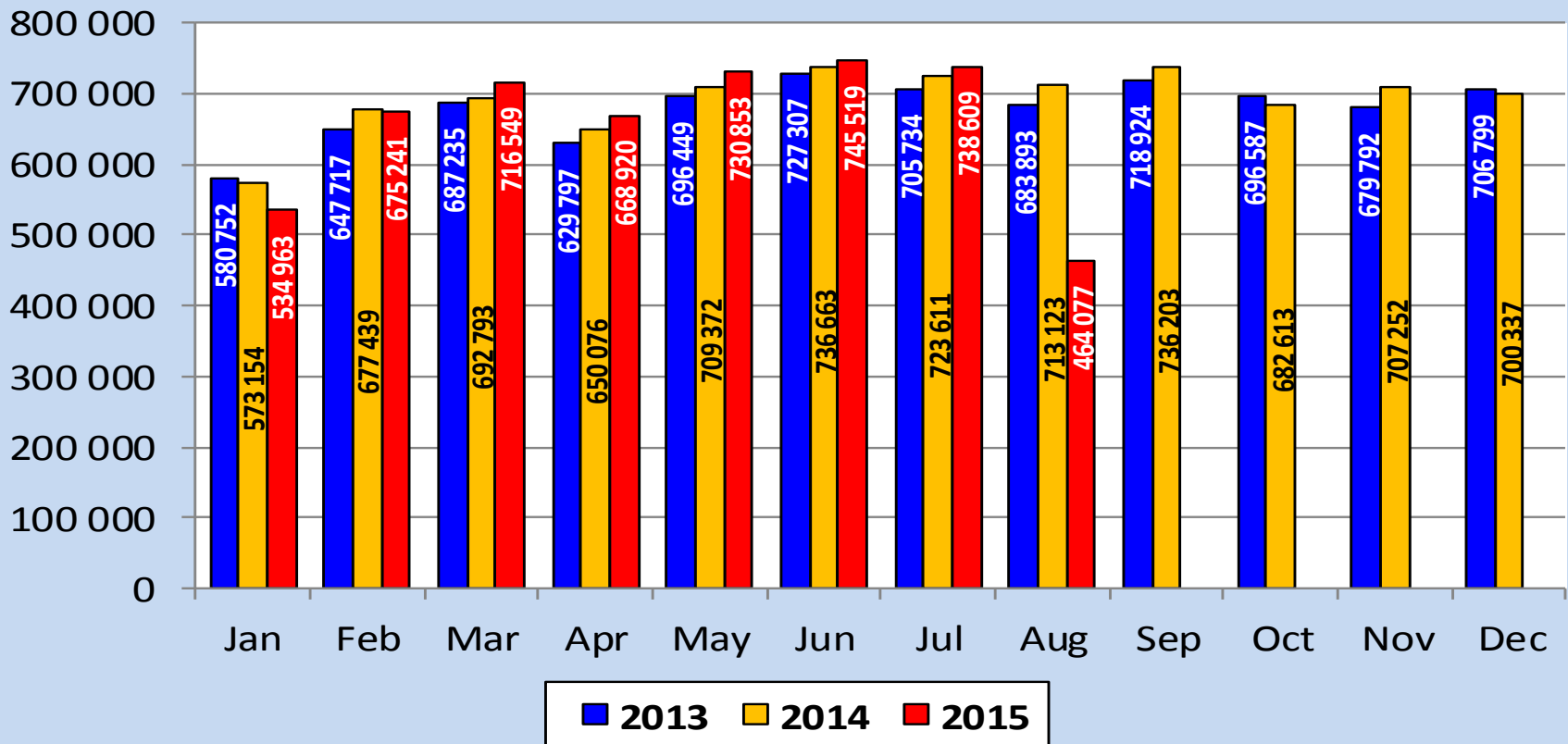
Placings of broiler chicks (1 000 pieces)



Parameters for the calculation of the estimated production of broilers

	BE	BG	CZ	DK	DE	EE	GR	ES	FR	HR	IE	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK
Parameter	2013																											
National Average Live weight (kg) at Slaughter	2,40	2,10	1,90	2,10	2,11	2,39	2,40	2,66	2,02	1,99	2,04	2,60	2,64	2,10	2,44	2,40	2,33	2,55	2,23	1,83	2,44	1,85	2,20	2,20	2,12	2,34	1,91	2,23
National Average Carcass yield (%)	68%	73,0%	74,0%	75,0%	70,0%	71,0%	75,0%	70,2%	67,0%	69,4%	71,7%	70,1%	77,0%	74,4%	75,1%	68%	70,1%		74,0%	66,0%	75,0%	69,9%	72,4%	70,5%	72,5%	72,5%	75,0%	69,0%
National Average Mortality (%)	2,0%	4,3%	4,0%	2,5%	3,0-3,5% (l.w.) 4,0% (h.w.)	2,5% - 3,0%	6,0%	5,2%	4,2%	3,7%	2,9%	5,0%	3,2%	3,3%	5,0%	2,0%	4,2%	6,5%	3,5%	4,2%	4,2%	2,6%	2,5%	3,9%	3,5%	3,5%		4,8%
National Average Period of rearing (days)	40,0	51*	35,0	35,0	30-38	37-40	45,0	43,5	37,7	35,0	36,9	35/46	47,4	37,1	40,0	40,0	41,5	45,0	41,0	35,00	42,0	37,8	41,0	37,7	38,5	37,0		42,0

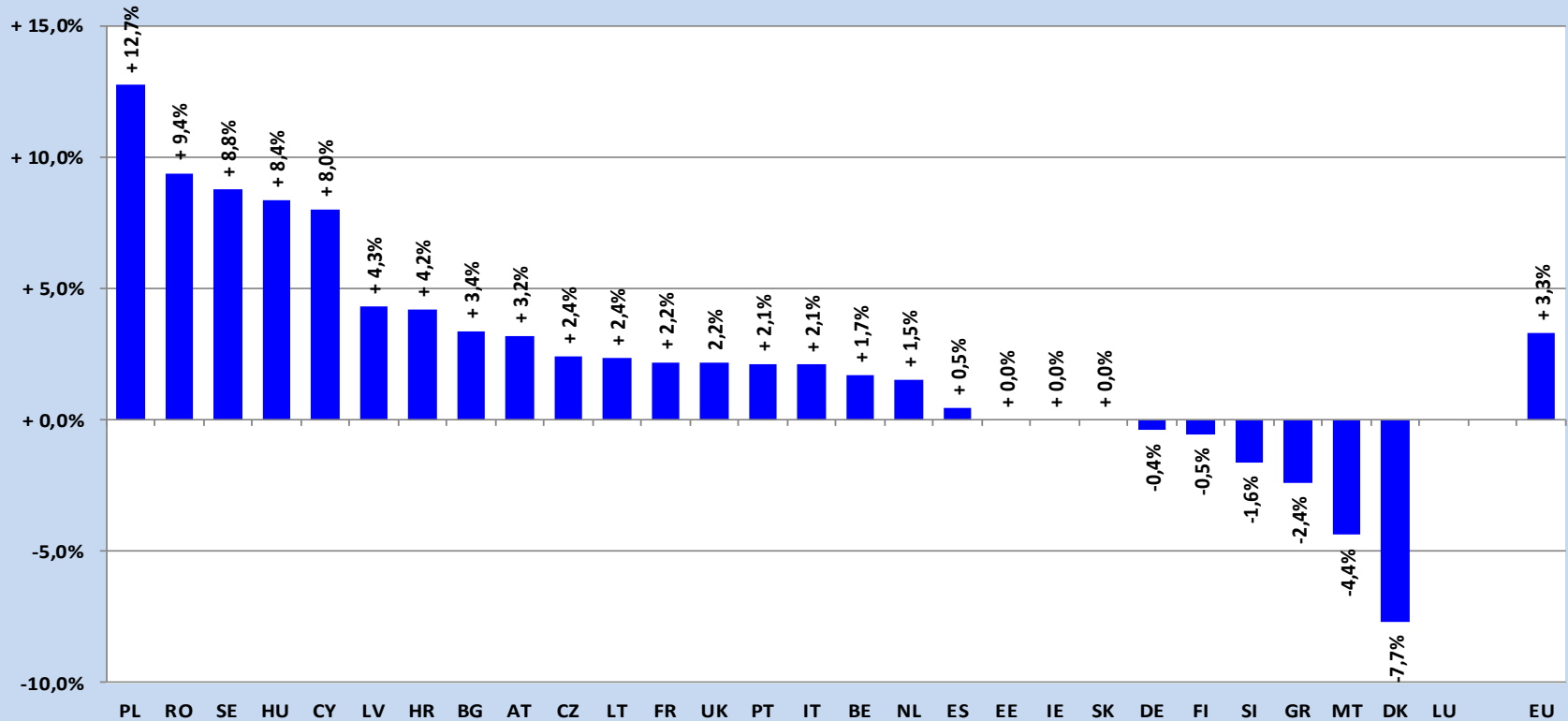
Forecast and Production of broiler (In tonnes)



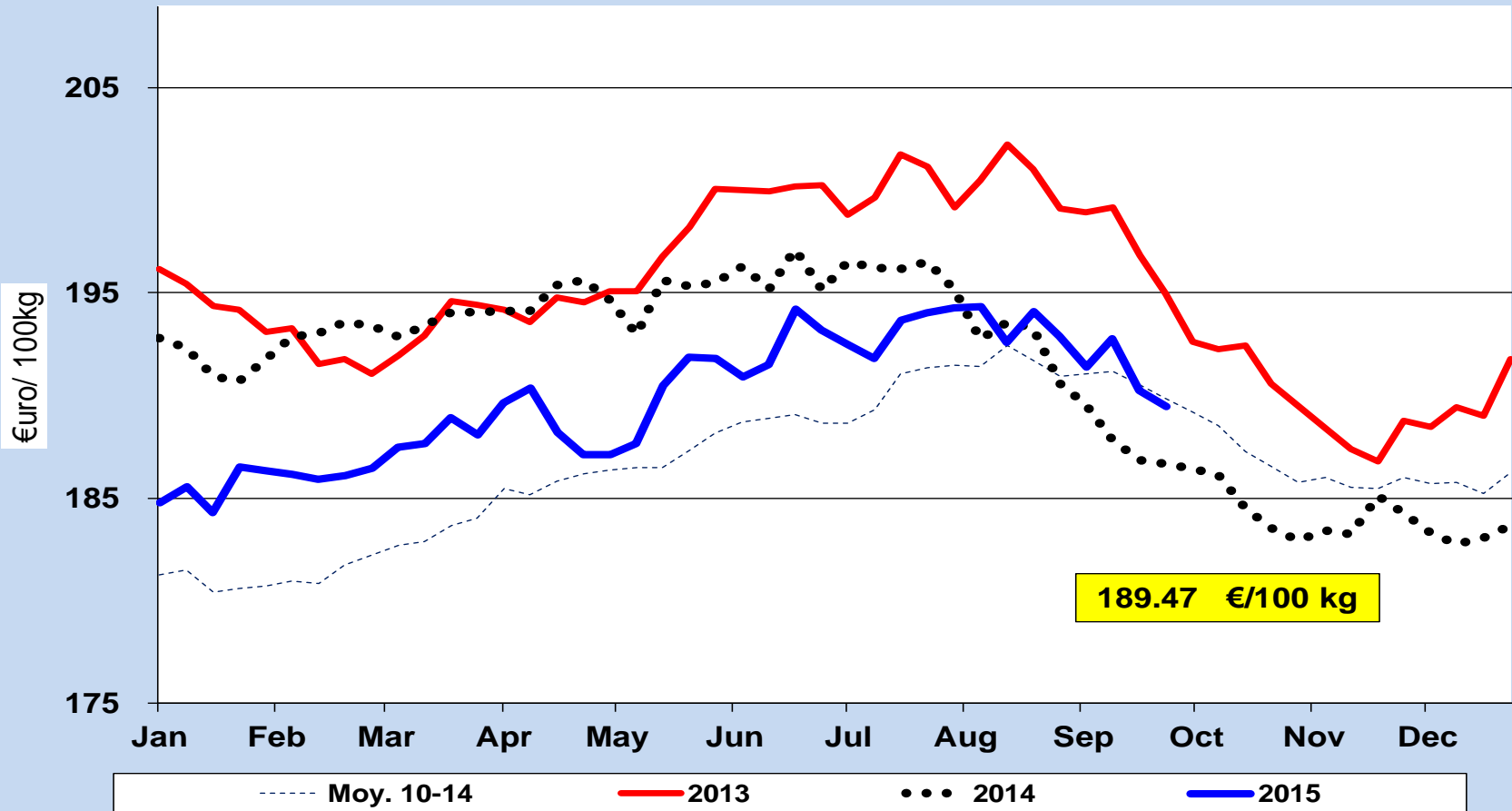


European
Commission

Change in **Poultry** slaughter Jan.-June 2015 compared with Jan.-June 2014

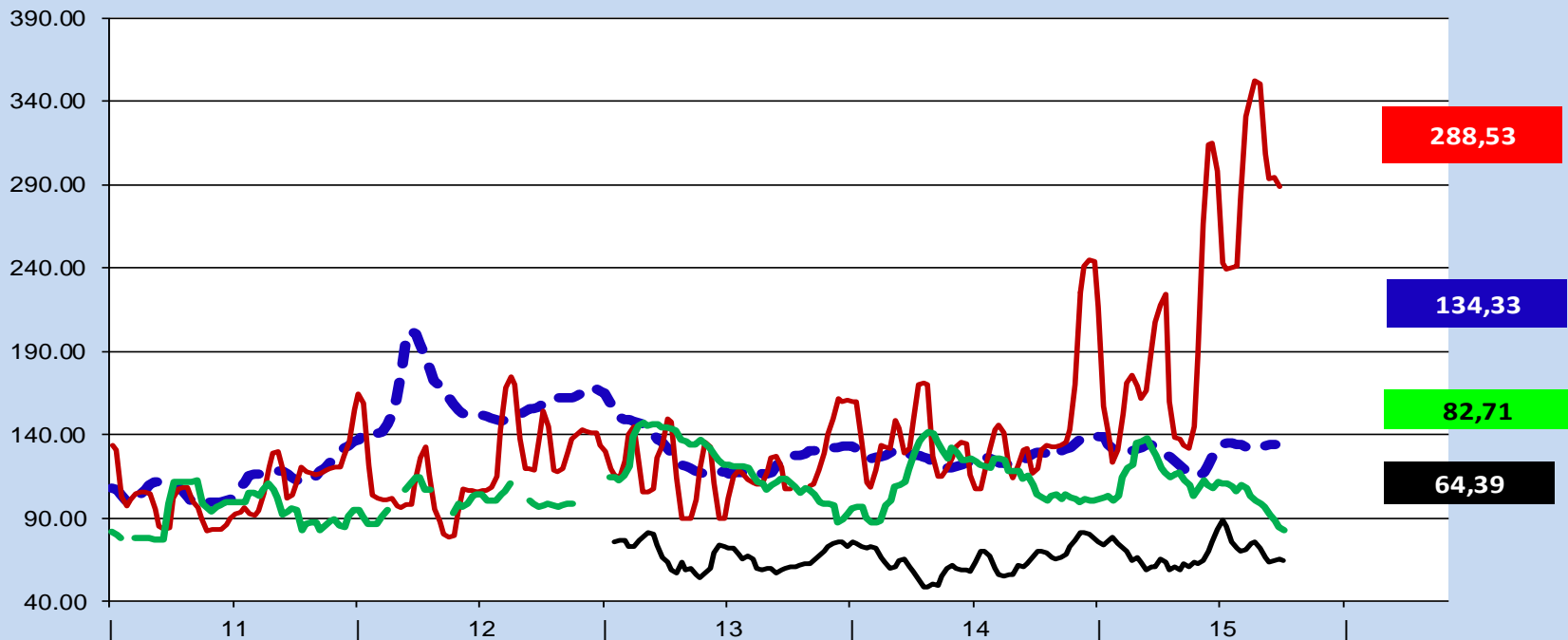


Evolution of the weekly EU average price for **Broiler**



Source: MSs weekly communications

Egg prices of EU, USA, Brazil and India in €uro/ 100kg

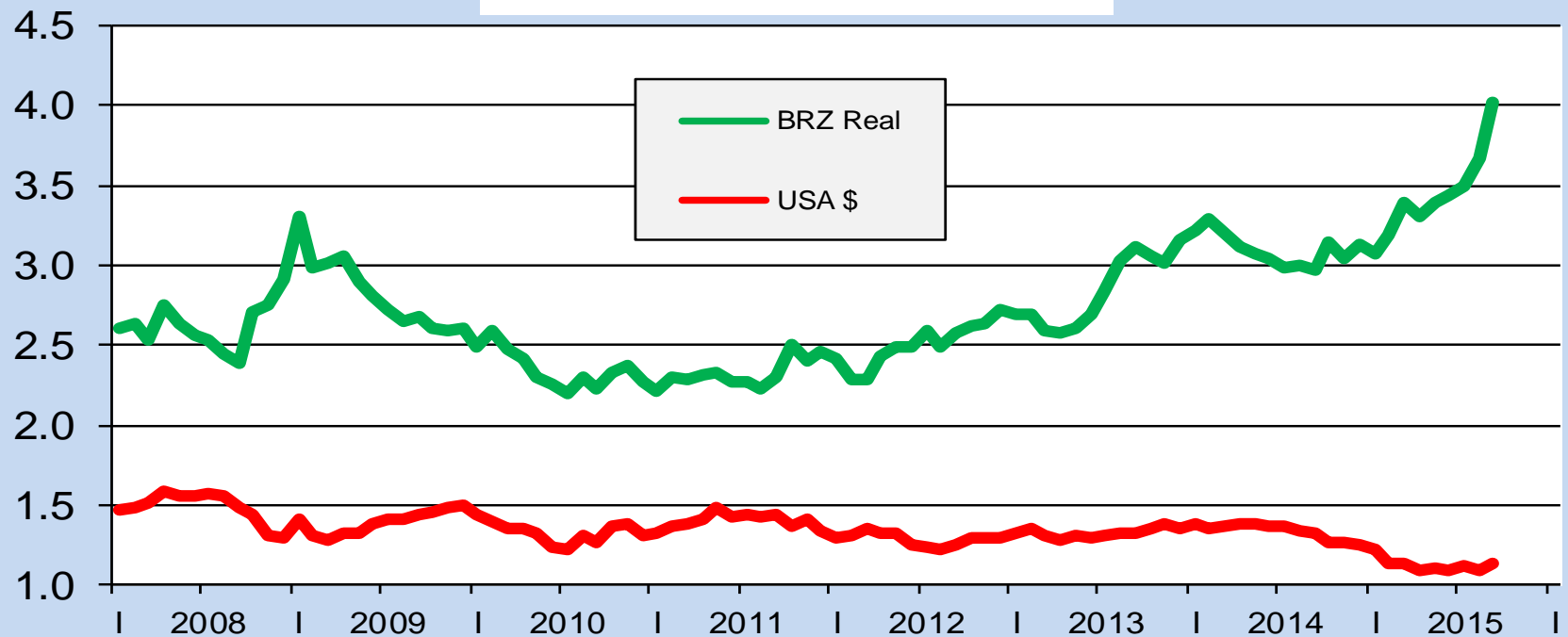


EU = weighted avg of MS prices Average class L&M
 US = weekly USDA prices Eggs grade A ,Chicago
 BR = avg of prices in main producing states (noticiasagricolas.com.br)
 IN = avg of NECC prices in available Production Centres (e2necc.com)

--- EU egg
 — US egg €uro
 — BR Egg €uro
 — IN NECC €uro

€uro Exchange rate

1 Euro =US\$ / BRZ Real/

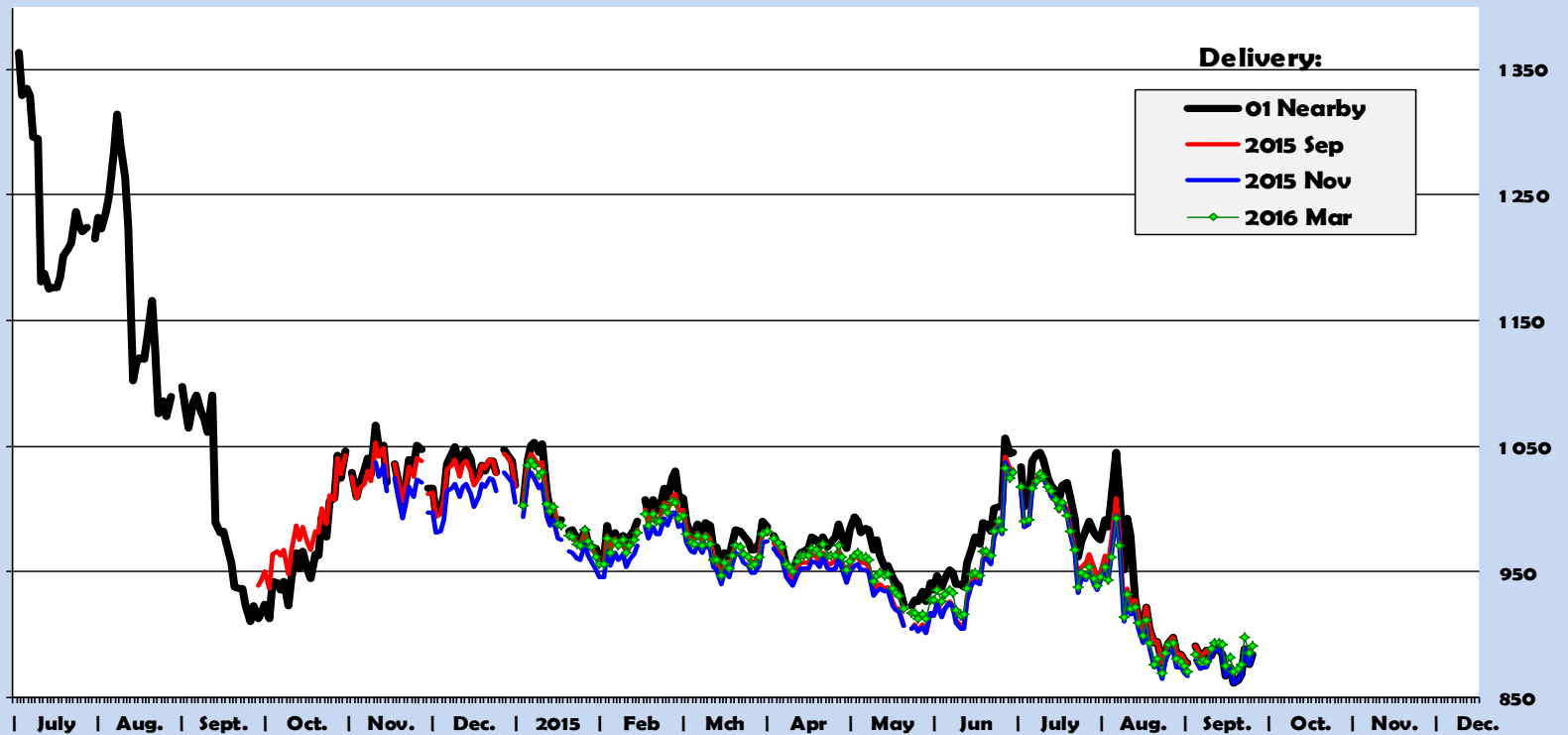


source:<http://europa.eu.int/comm/budget/inforeuro/fr/index.htm>

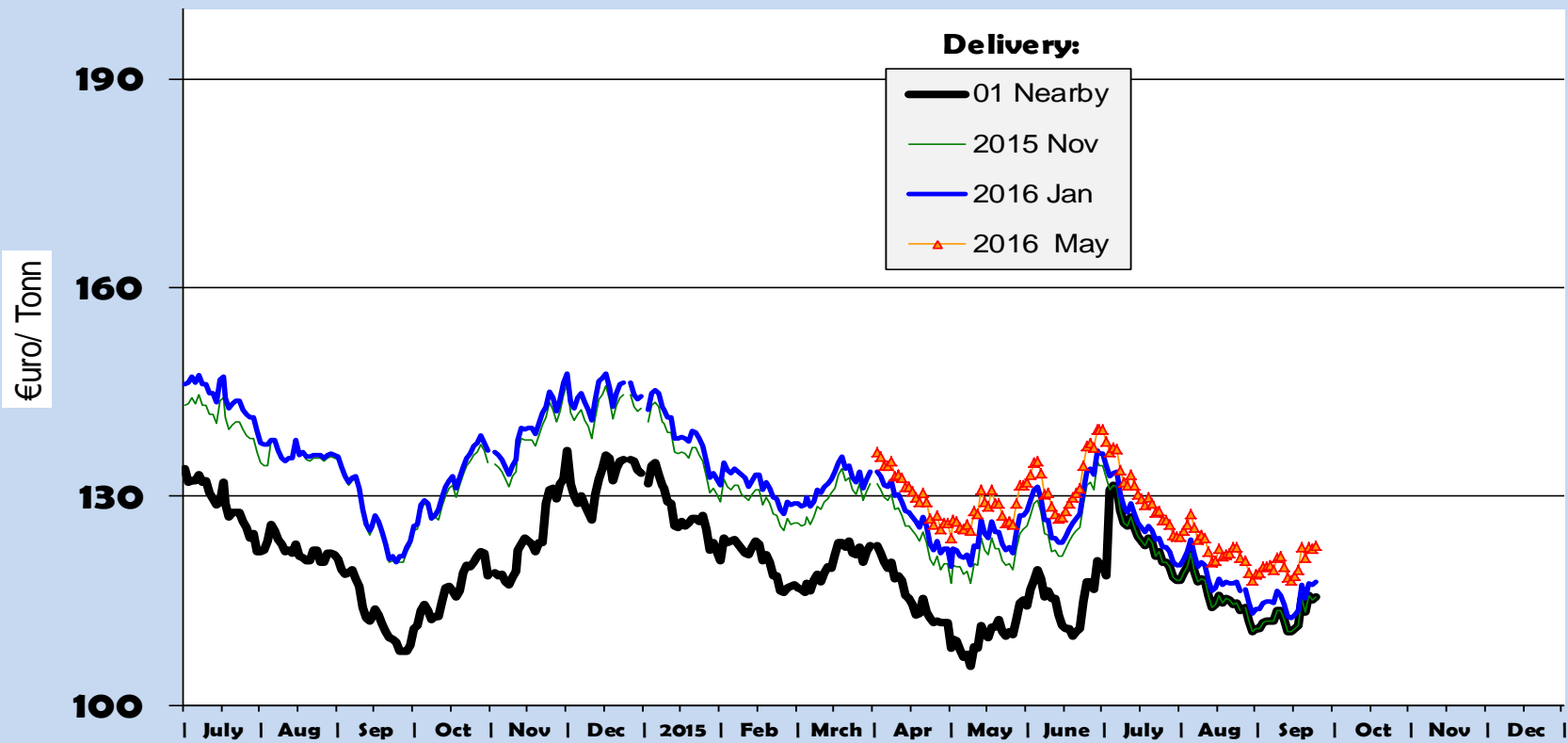


European
Commission

Futures for Soybeans in US\$/ct/ Bushel (nearby = 2013 & 2014)



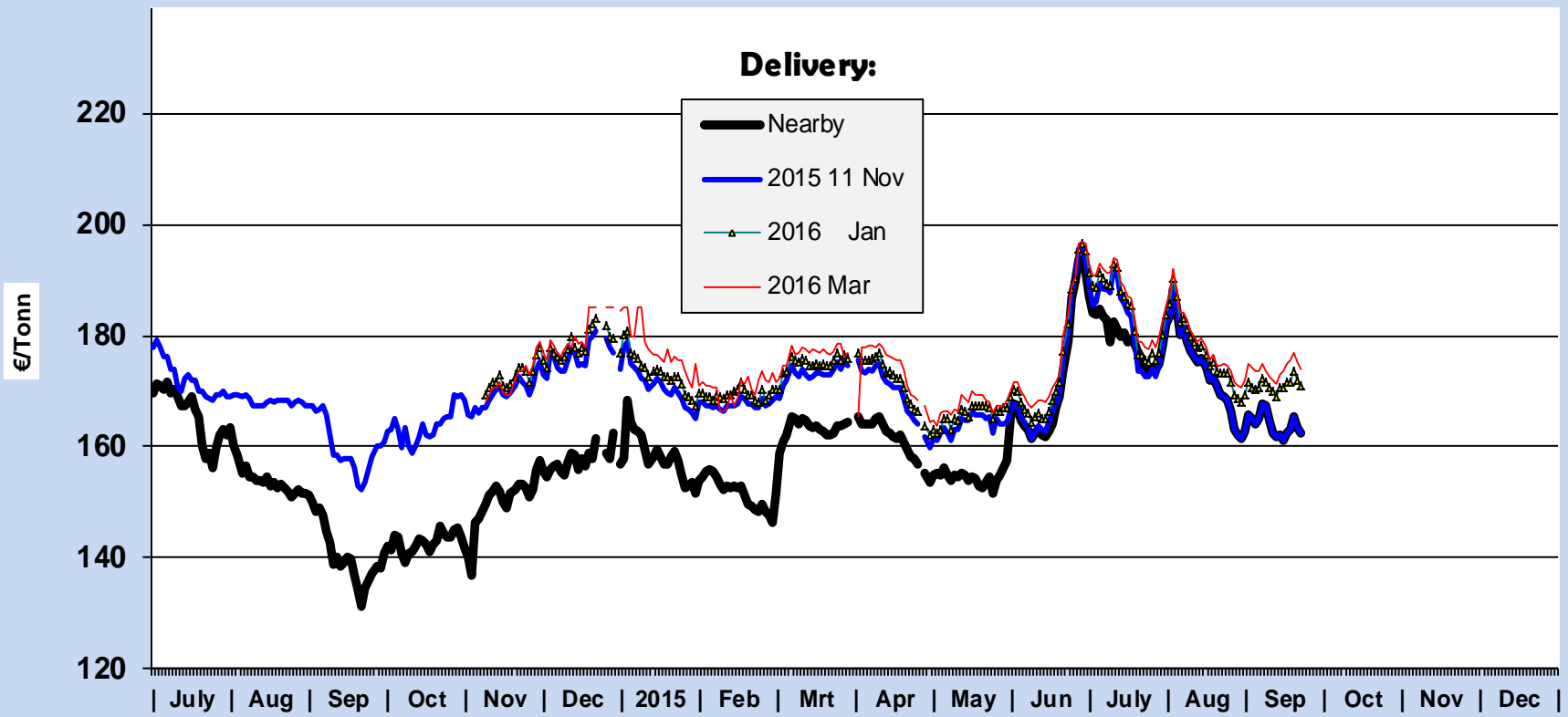
Futures for Feed wheat EU (Euronext) (Nearby = 2014 & 2015)





European
Commission

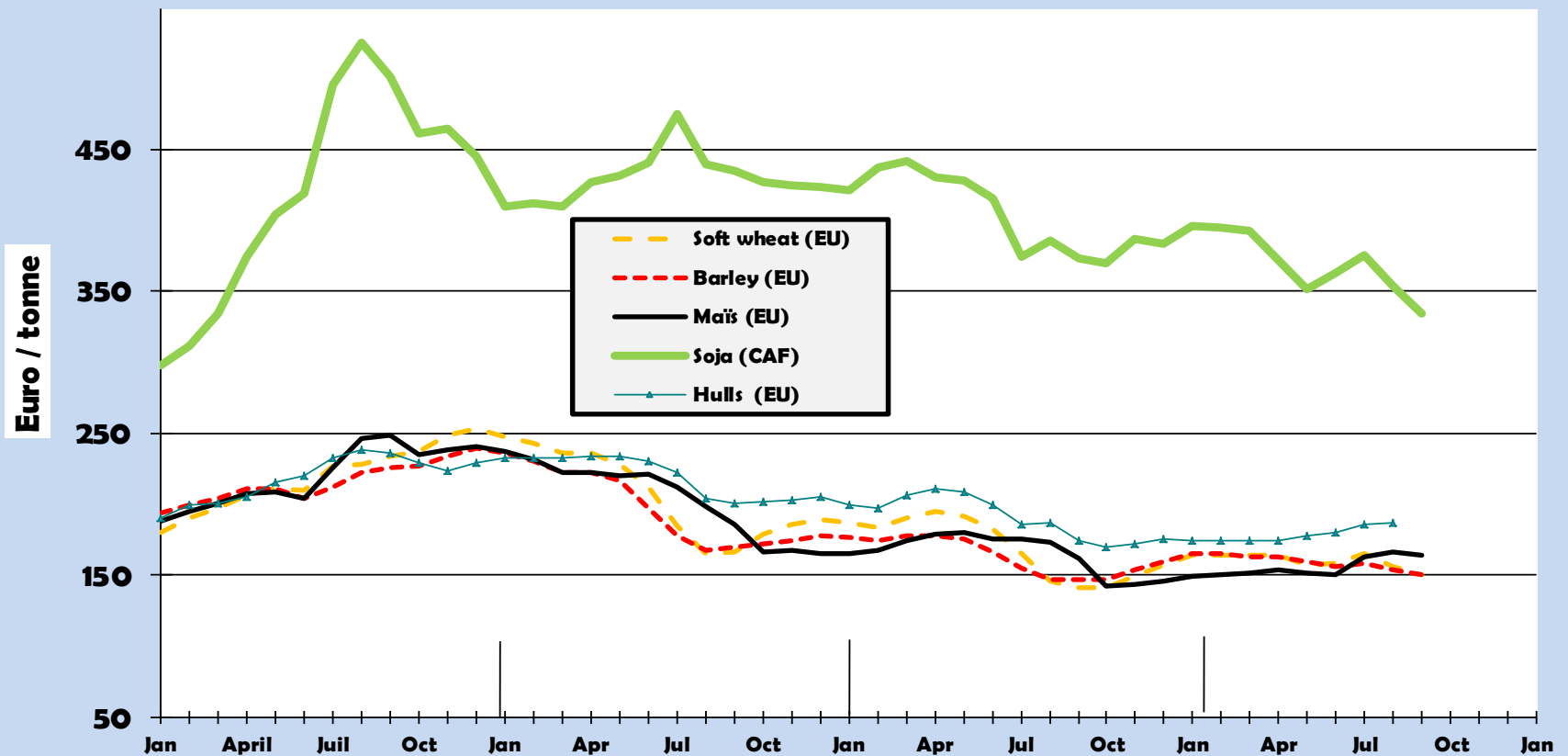
Futures for Maize EU (Euronext) (Nearby = 2014 - 2015)





European
Commission

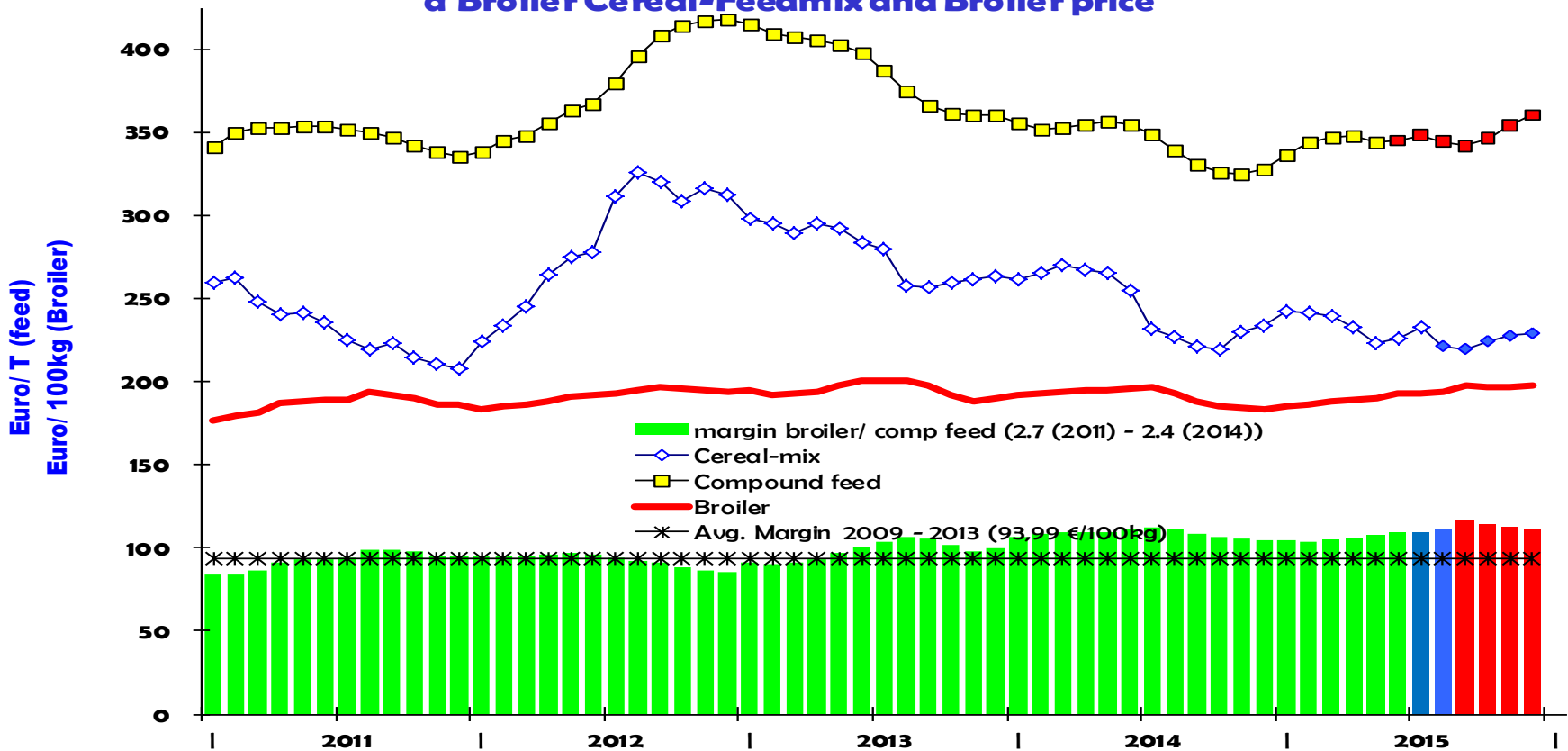
Price of Basic Ingredients 2012 - 2015





European Commission

Price development of Compound feed for Broilers, a Broiler Cereal-Feedmix and Broiler price

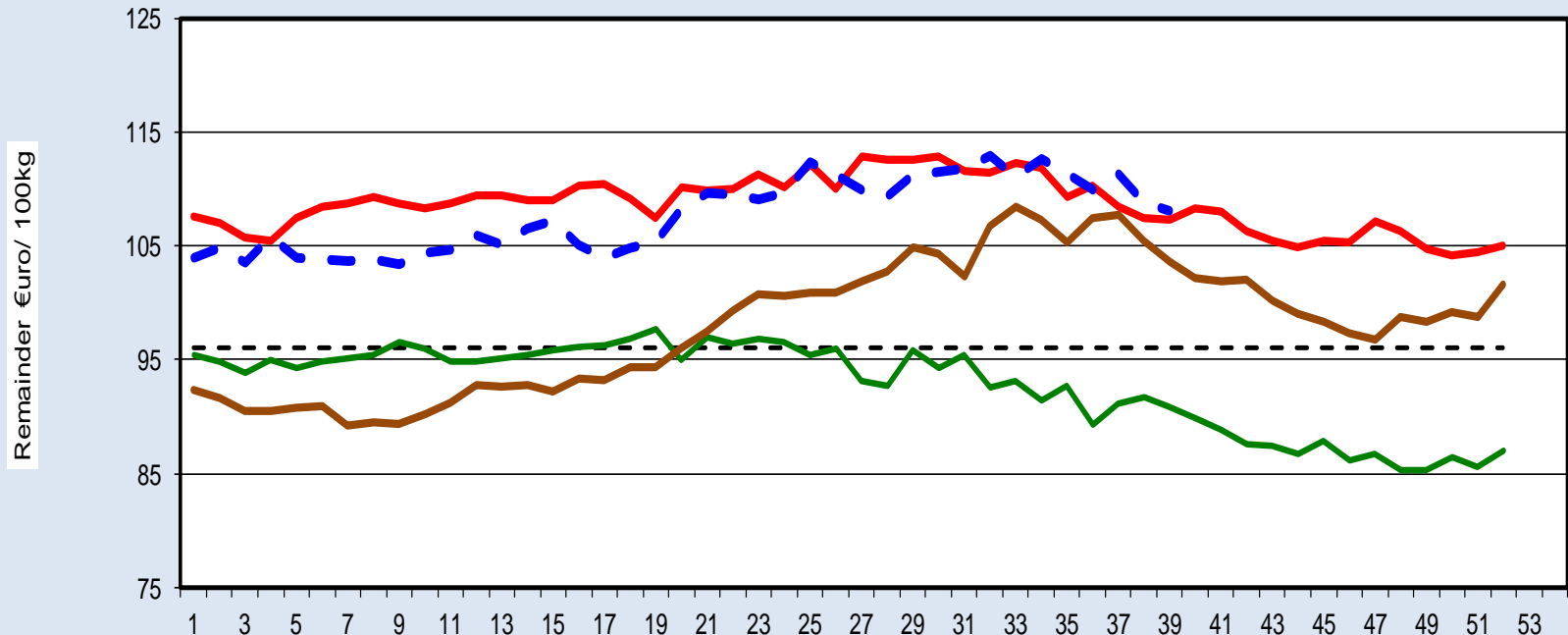


NB. Comp. Feed 2014 =Forecast as from February 2015.
Cereal mix and Poultry = Forecast as from June 2015.



European
Commission

100KG Broiler minus feedcost for Broilers feedconversionrate = 2,7 (2011) - 2,4 (2014)



-- Marge Average
10 - 14

— Marge Broiler 2012

— Marge Broiler 2013

— Marge Broiler 2014

— Marge Broiler 2015

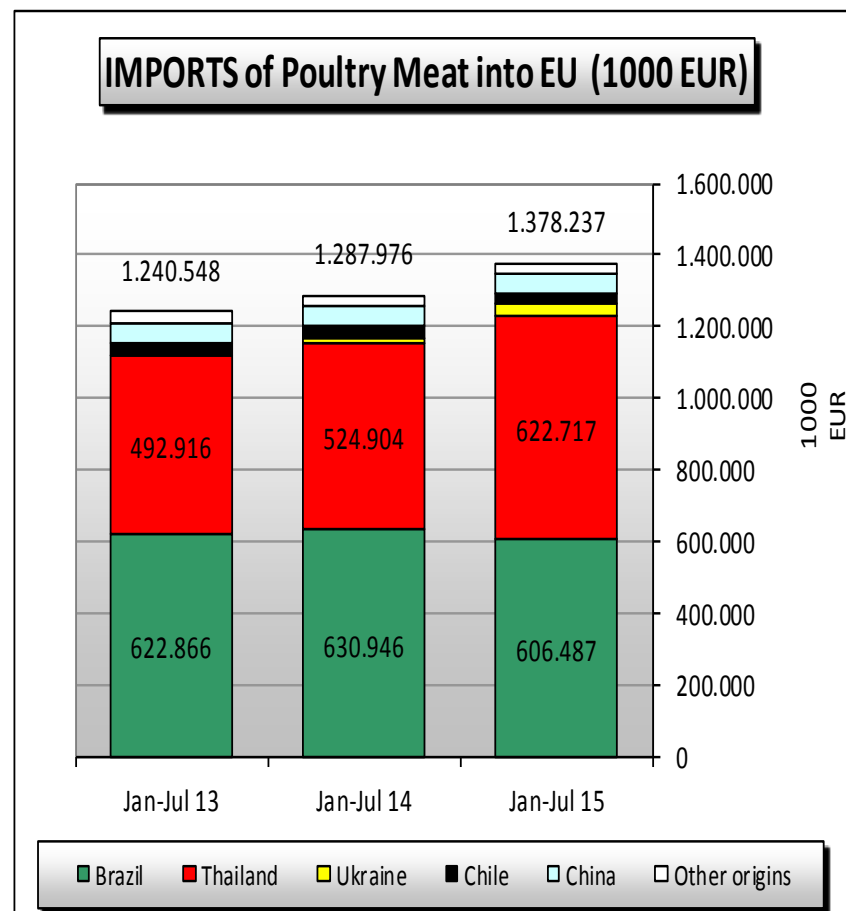
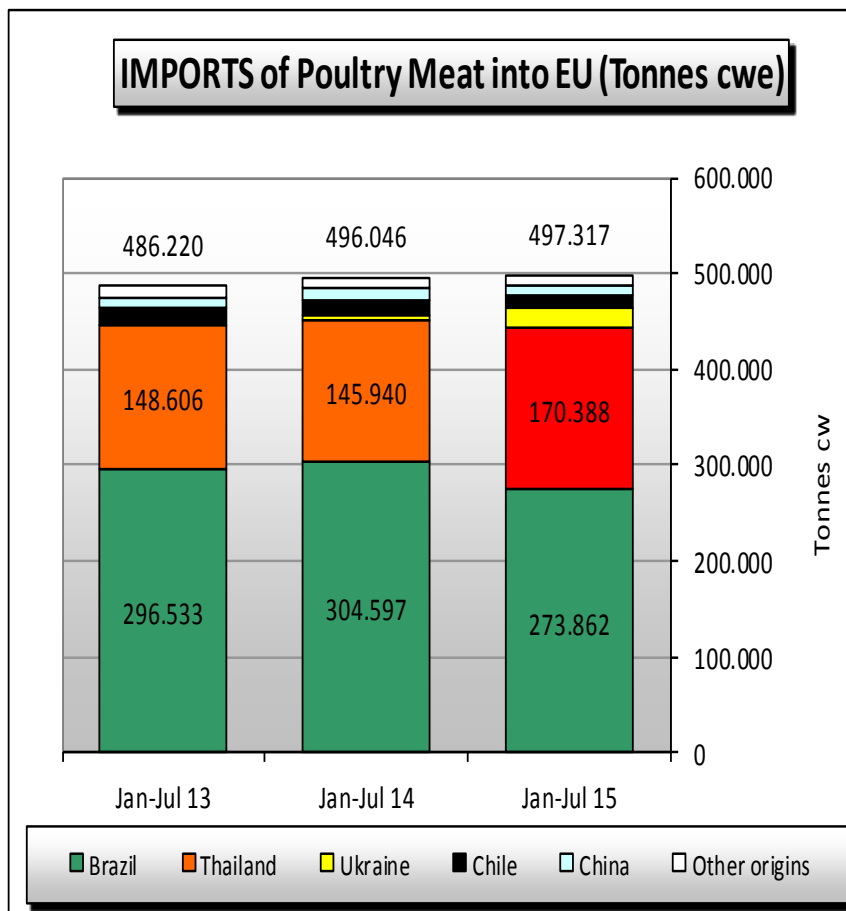


TRADE

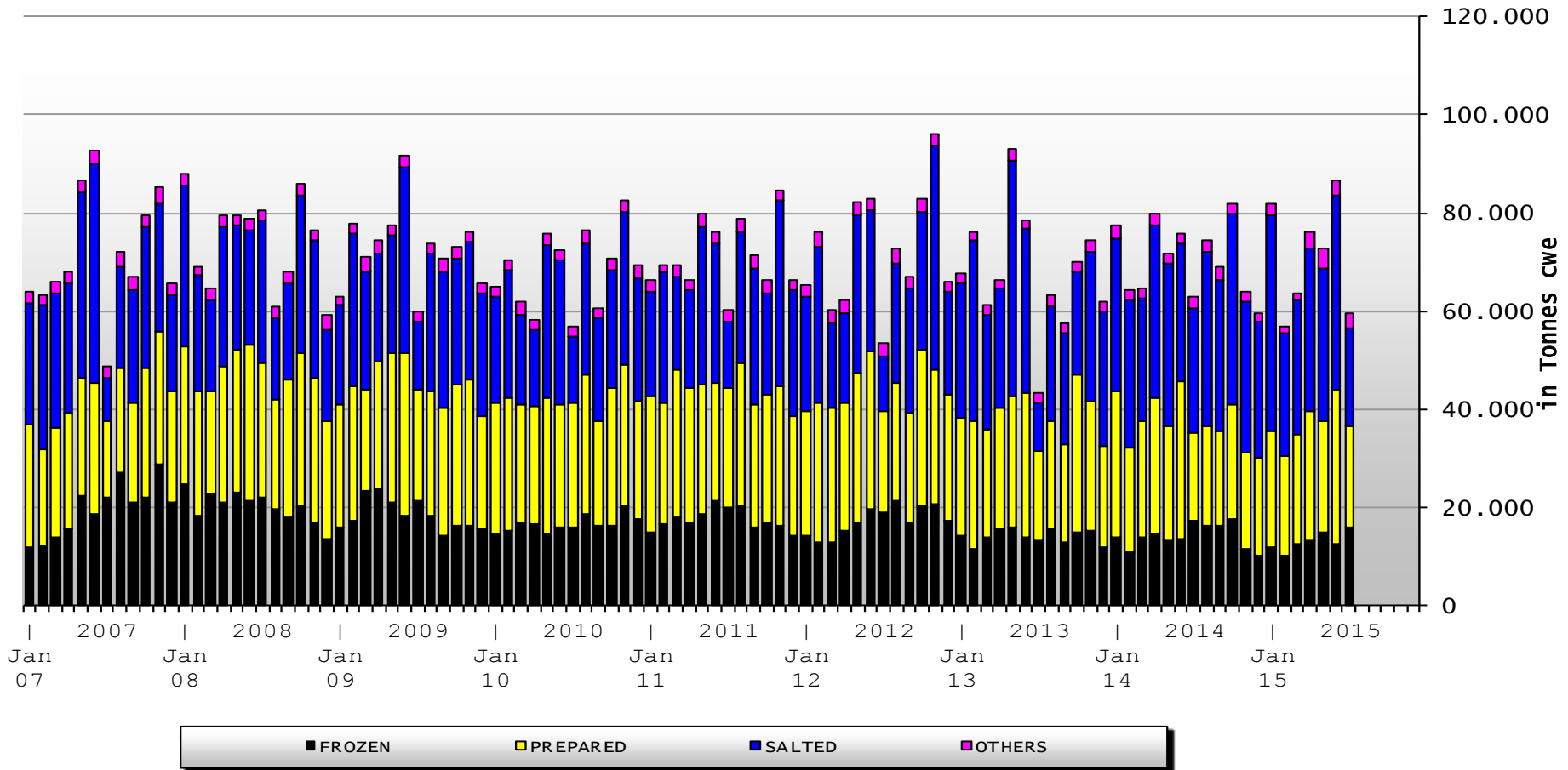
Imports of Poultry meat from selected origins

	2011		2012		2013		2014		Jan-Jul 15		Compared to Jan-Jul 14
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	615.832	71,9%	583.449	67,3%	514.339	63,2%	500.569	59,7%	273.862	55,1%	- 10%
Thailand	155.788	18,2%	197.962	22,8%	228.238	28,0%	250.338	29,9%	170.388	34,3%	+ 17%
Ukraine	31	0,0%			276	0,0%	19.928	2,4%	20.972	4,2%	+++
Chile	44.433	5,2%	42.192	4,9%	30.515	3,7%	25.801	3,1%	11.572	2,3%	- 28%
China	13.874	1,6%	15.698	1,8%	18.145	2,2%	19.703	2,4%	10.440	2,1%	- 14%
Argentina	15.700	1,8%	13.766	1,6%	10.783	1,3%	10.993	1,3%	5.206	1,0%	- 15%
Switzerland	1.253	0,1%	3.817	0,4%	3.817	0,5%	4.234	0,5%	1.523	0,3%	- 43%
USA	129	0,0%	352	0,0%	193	0,0%	43	0,0%	861	0,2%	+++
Others	10.051	1,2%	9.968	1,1%	7.525	0,9%	6.326	0,8%	2.493	0,5%	
EXTRA EU 28	857.092		867.203		813.832		837.935		497.317		
% change			+ 1%		- 6%		+ 3%		+ 0,3%		

EU Poultry meat Imports



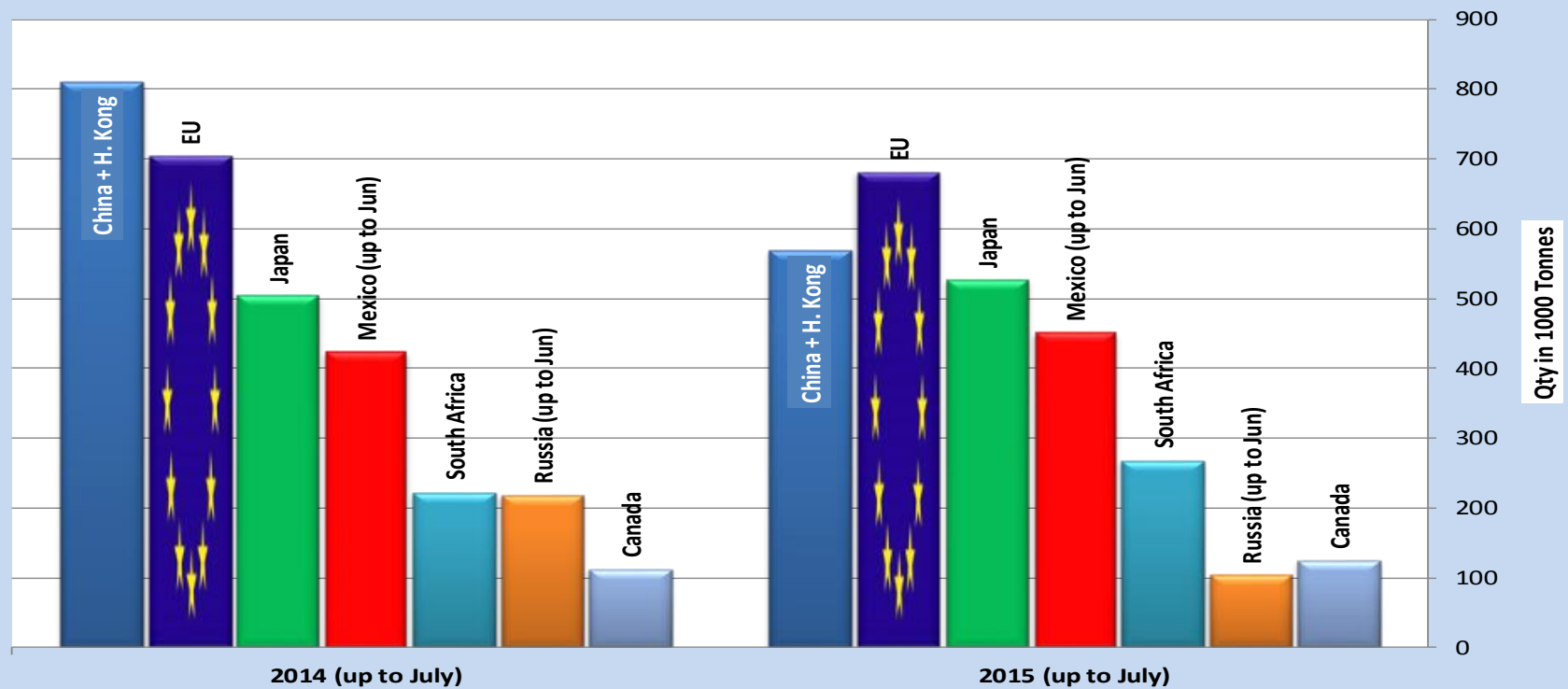
Imports of selected Poultry products



Main Importers of POULTRY Products (up to July)

Source : GTA & Eurostat

(excl.: live animals)

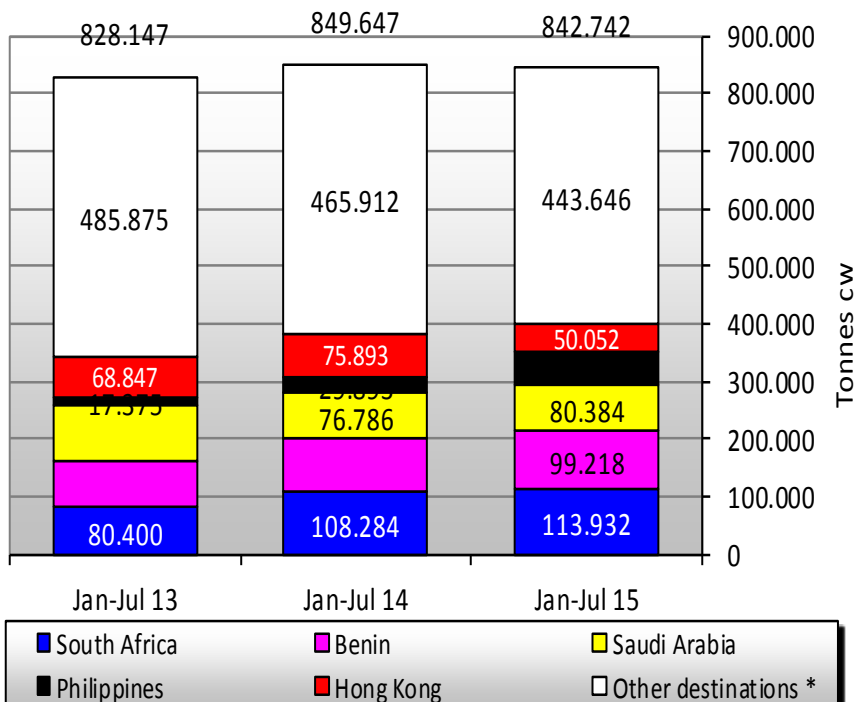


Exports of Poultry Meat to Selected Destinations

	2011		2012		2013		2014		Jan-Jul 15		Compared to Jan-Jul 14
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
South Africa	94.083	6,7%	131.832	9,2%	158.510	11,1%	203.414	13,5%	113.932	13,5%	+ 5%
Benin	126.213	8,9%	139.817	9,8%	139.247	9,8%	163.793	10,9%	99.218	11,8%	+ 7%
Saudi Arabia	151.520	10,7%	149.310	10,4%	154.775	10,9%	123.559	8,2%	80.384	9,5%	+ 5%
Philippines	30.341	2,1%	30.764	2,2%	35.674	2,5%	57.621	3,8%	55.510	6,6%	+ 86%
Hong Kong	189.151	13,4%	126.072	8,8%	117.152	8,2%	136.088	9,0%	50.052	5,9%	- 34%
Ukraine	81.687	5,8%	103.427	7,2%	75.966	5,3%	80.208	5,3%	41.365	4,9%	+ 20%
Ghana	68.978	4,9%	69.156	4,8%	75.216	5,3%	56.883	3,8%	40.522	4,8%	+ 39%
Congo (Dem. Rep.)	29.972	2,1%	34.231	2,4%	28.625	2,0%	33.723	2,2%	22.278	2,6%	+ 18%
Gabon	25.601	1,8%	26.298	1,8%	25.070	1,8%	29.409	2,0%	20.739	2,5%	+ 27%
For.JRep.Mac	24.790	1,8%	32.747	2,3%	36.530	2,6%	33.552	2,2%	19.216	2,3%	- 3%
Russia	115.136	8,1%	113.134	7,9%	95.179	6,7%	68.325	4,5%	576	0,1%	- 99%
Other Destinations	476.174	33,7%	473.766	33,1%	484.421	34,0%	517.311	34,4%	298.950	35,5%	
Extra-EU 28	1.413.647		1.430.554		1.426.365		1.503.885		842.742		
% change			+ 1%		- 0%		+ 5%		- 0,8%		

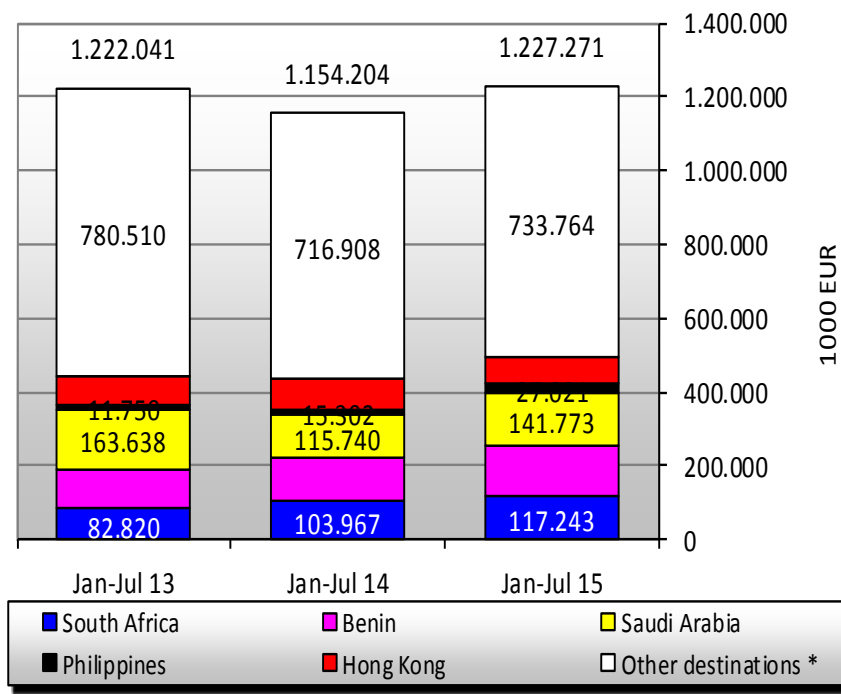
EU Poultry meat Export

EU EXPORTS of Poultry Meat (Tonnes cwe)



* countries trading less than 42 000 Tons

EU EXPORTS of Poultry Meat (1000 EUR)

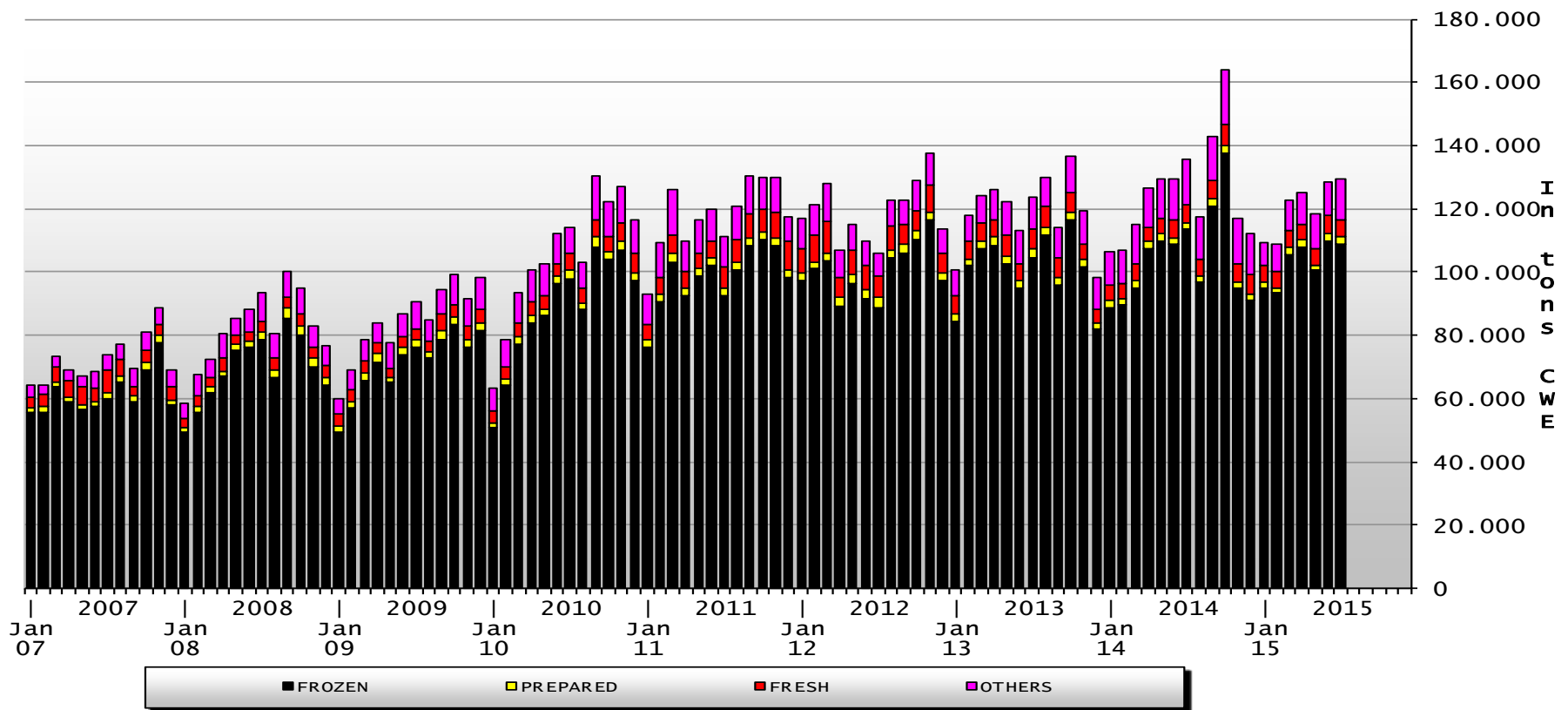


* countries trading less than 83 000 ('000 EUR)

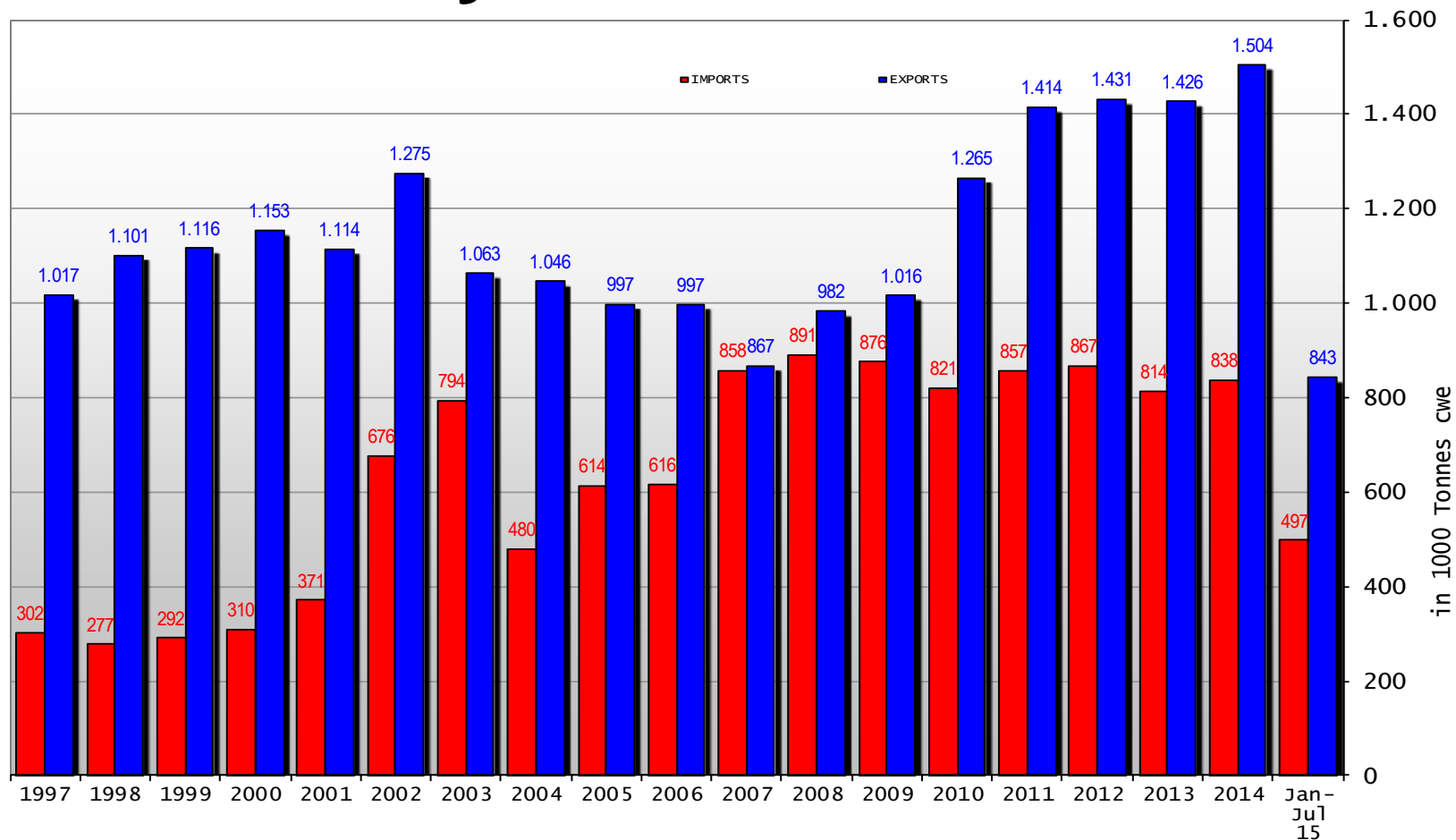


European
Commission

Exports of selected Poultry products



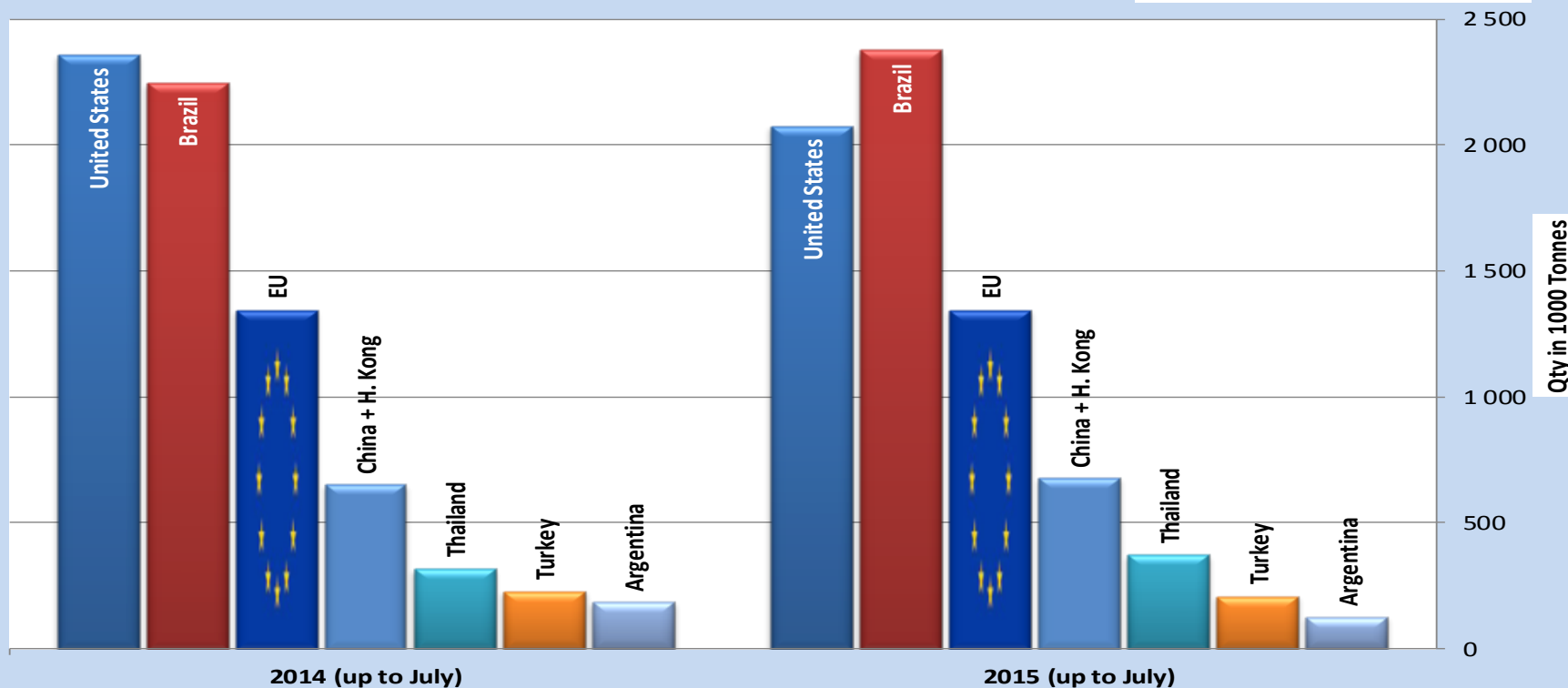
EU Poultry meat Trade Balance



Main Exporters of POULTRY Products (up to July)

Source : GTA & Eurostat

(excl. live animals)



Where to find data:

- http://ec.europa.eu/agriculture/markets/index_en.htm
- **Click on link: Poultry**
- **Click on link: Presentations and prices**
(righthand side under: in this chapter)
- **Choose the item (link) you want**