

EU Market Situation for Poultry

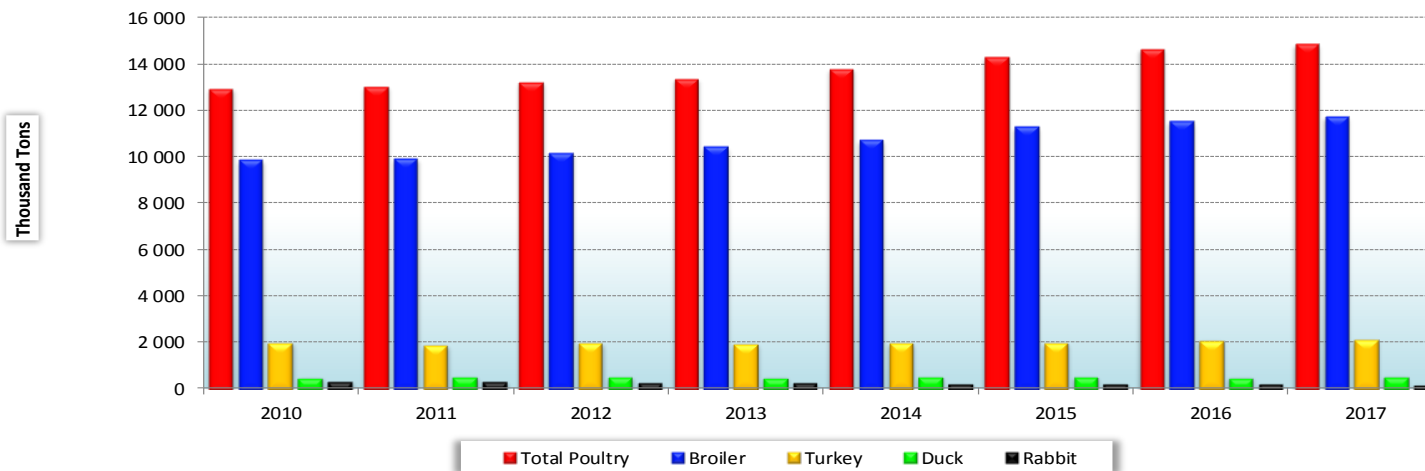
Civil Dialogue Group

25 October 2016



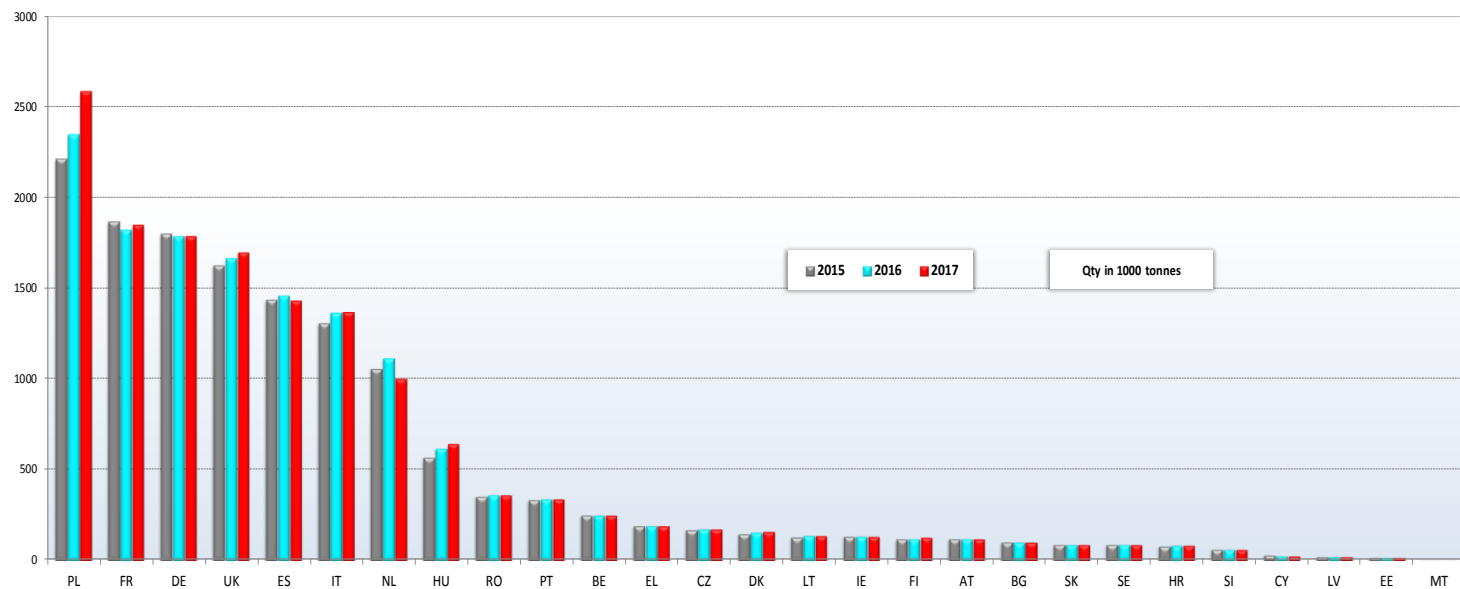
Experts EU production forecast on Poultry and Rabbit

(Missing data (BE-EL-AT-RO-LT-SE) - No expert (BG-EE-LV-MT-SK))



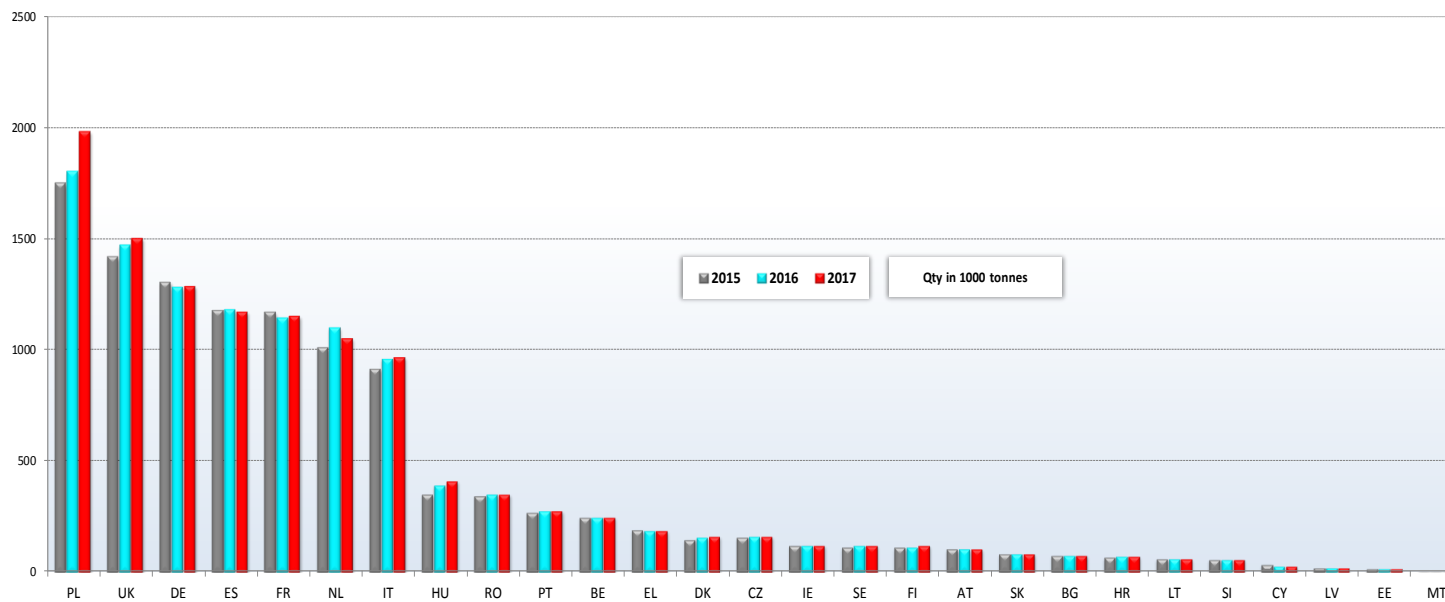
	2010	2011	2012	2013	2014	2015	2016	2017	% 2015/2014	% 2016/2015	% 2017/2016
Total Poultry	12 945	13 035	13 220	13 367	13 797	14 293	14 645	14 841	+ 3.6%	+ 2.5%	+ 1.3%
Broiler	9 876	9 932	10 173	10 445	10 729	11 295	11 546	11 747	+ 5.3%	+ 2.2%	+ 1.7%
Turkey	1 976	1 878	1 967	1 935	1 964	1 966	2 087	2 118	+ 0.1%	+ 6.2%	+ 1.5%
Duck	481	500	500	485	512	503	488	522	- 1.8%	- 3.0%	+ 7.1%
Rabbit	329	328	281	260	246	243	213	208	- 1.3%	- 12.4%	- 2.1%

Experts EU production forecast of Poultry Meat



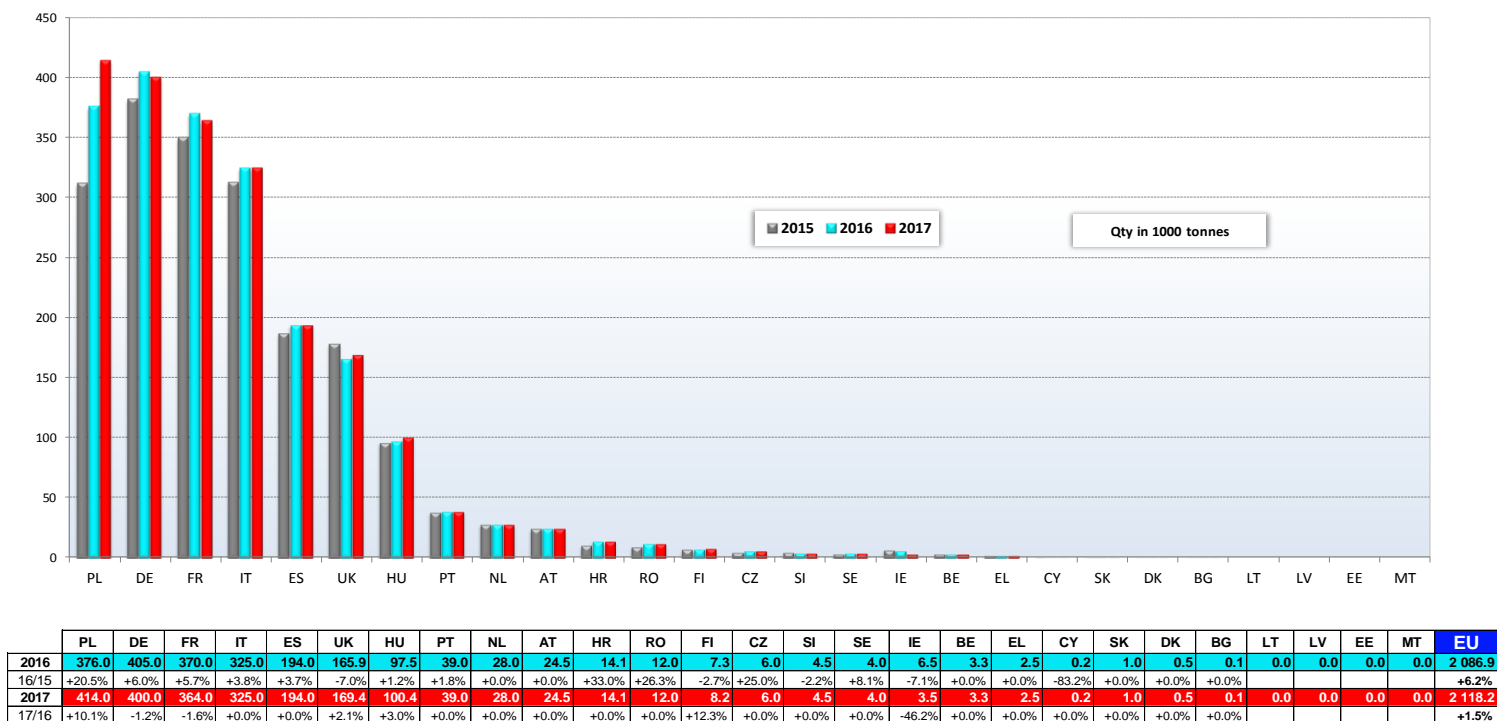
	PL	FR	DE	UK	ES	IT	NL	HU	RO	PT	BE	EL	CZ	DK	LT	IE	FI	AT	BG	SK	SE	HR	SI	CY	LV	EE	MT	EU
2016	2348.0	1820.0	1788.0	1665.6	1461.0	1365.0	1115.0	615.7	362.0	339.0	250.0	192.0	174.5	155.8	137.0	134.3	117.3	118.7	102.0	86.0	86.0	85.1	61.0	24.2	21.0	15.0	6.0	14 645.2
16/15	+6.1%	-2.5%	-0.7%	+2.5%	+1.8%	+4.4%	+5.5%	+8.6%	+2.7%	+1.5%	+0.0%	+1.1%	+3.1%	+6.1%	+5.8%	+1.4%	+0.2%	+0.0%	+0.0%	+0.0%	+0.0%	+10.7%	+1.5%	-17.3%	+0.0%	+0.0%	+0.0%	+2.5%
2017	2 583.0	1 850.0	1 788.0	1 698.5	1 430.0	1 368.0	1 000.0	642.1	362.0	339.0	250.0	192.0	174.5	160.8	137.0	134.3	126.2	118.7	102.0	86.0	86.0	85.1	61.0	24.7	21.0	15.0	6.0	14 840.9
17/16	+10.0%	+1.6%	+0.0%	+2.0%	-2.1%	+0.2%	-10.3%	+4.3%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+3.2%	+0.0%	+0.0%	+7.6%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+2.1%	+0.0%	+0.0%	+0.0%	+0.0%	+1.3%

Experts EU production forecast of Broiler Meat



	PL	UK	DE	ES	FR	NL	IT	HU	RO	PT	BE	EL	DK	CZ	IE	SE	FI	AT	SK	BG	HR	LT	SI	CY	LV	EE	MT	EU
2016	1800.0	1471.0	1280.0	1180.0	1144.0	1098.0	960.0	390.4	350.0	274.0	246.0	185.0	155.0	160.0	120.0	118.0	110.0	102.1	80.1	75.0	70.4	58.5	56.5	24.0	17.0	13.8	7.4	11 546.2
16/15	+3.0%	+3.8%	-1.9%	+0.2%	-2.2%	+8.8%	+4.9%	+11.8%	+2.0%	+1.9%	+0.0%	-2.6%	+6.1%	+2.8%	+0.0%	+4.4%	+0.4%	+0.0%	+0.0%	+0.0%	+7.3%	+0.0%	+0.9%	-31.4%	+0.0%	+0.0%	+0.0%	+2.2%
2017	1 980.0	1 500.4	1 285.0	1 170.0	1 150.0	1 050.0	965.0	409.9	350.0	274.0	246.0	185.0	160.0	120.0	118.0	118.0	102.1	80.1	75.0	70.4	58.5	56.5	24.5	17.0	13.8	7.4	11 746.6	
17/15	+10.0%	+2.0%	+0.4%	-0.8%	+0.5%	-4.4%	+0.5%	+5.0%	+0.0%	+0.0%	+0.0%	+0.0%	+3.2%	+0.0%	+0.0%	+0.0%	+7.3%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+2.1%	+0.0%	+0.0%	+0.0%	+1.7%

Experts EU production forecast of Turkey Meat



Experts EU production forecast of Duck Meat



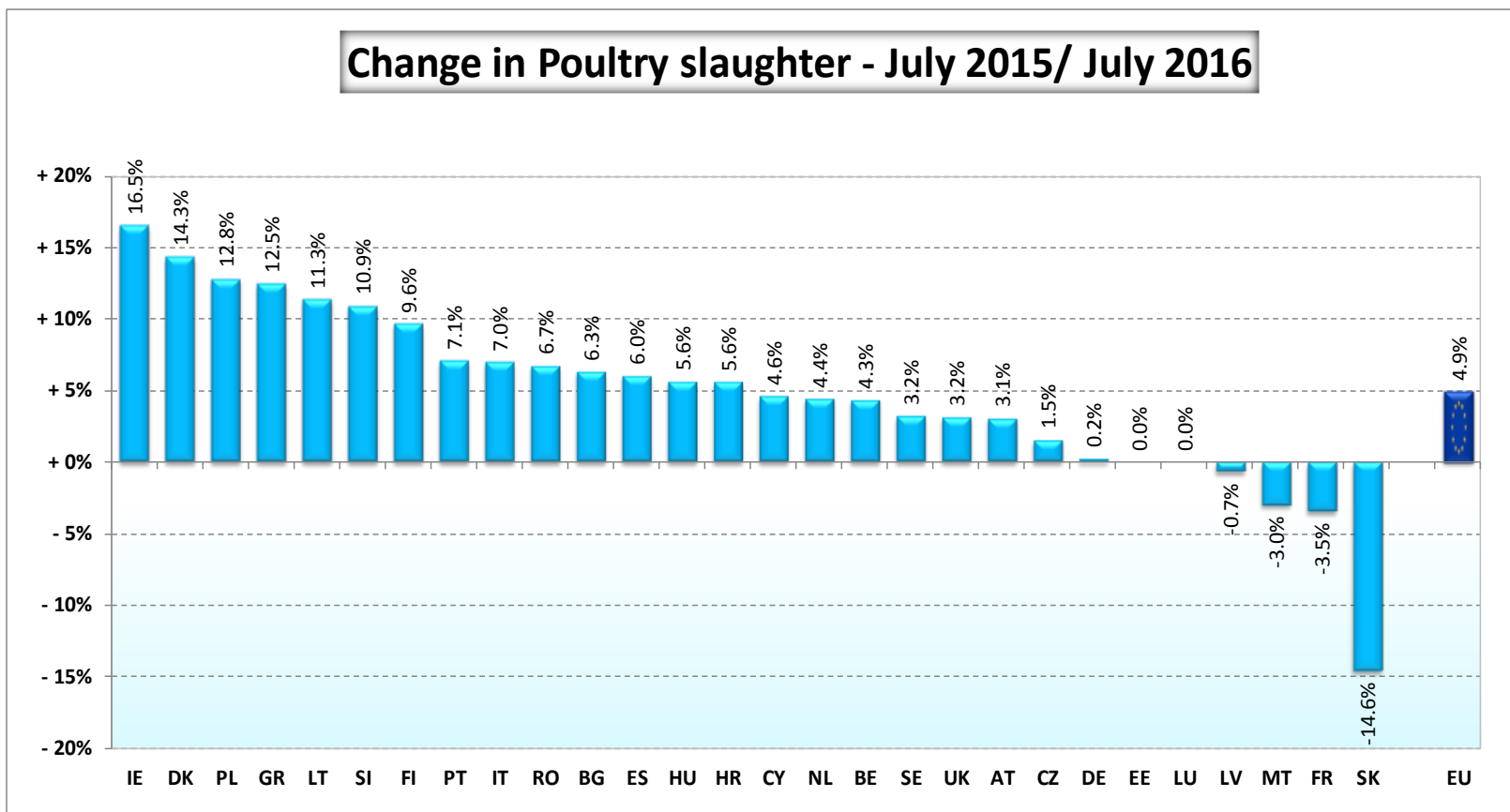
	FR	HU	DE	PL	UK	BG	NL	PT	CZ	IT	IE	ES	SK	HR	DK	EL	AT	BE	SI	SE	RO	FI	LT	CY	LV	EE	MT	EU	
2016	200.0	90.8	50.0	43.5	28.7	22.0	17.0	10.0	8.0	8.0	6.0	1.8	0.6	0.6	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	487.5
16/15	-13.4%	+13.5%	+0.2%	+11.5%	-1.7%	+0.0%	+6.3%	+2.0%	-3.6%	-11.1%	+11.1%	+20.0%	+0.0%	-5.5%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	-3.0%	
2017	230.0	94.6	50.0	43.5	28.7	22.0	18.0	10.0	8.0	7.5	6.0	2.0	0.6	0.5	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	522.0	
17/16	+15.0%	+4.2%	+0.0%	+0.0%	+0.0%	+0.0%	+5.9%	+0.0%	+0.0%	-6.3%	+0.0%	+11.1%	+0.0%	-3.6%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+7.1%	

Experts EU production forecast of Rabbit Meat

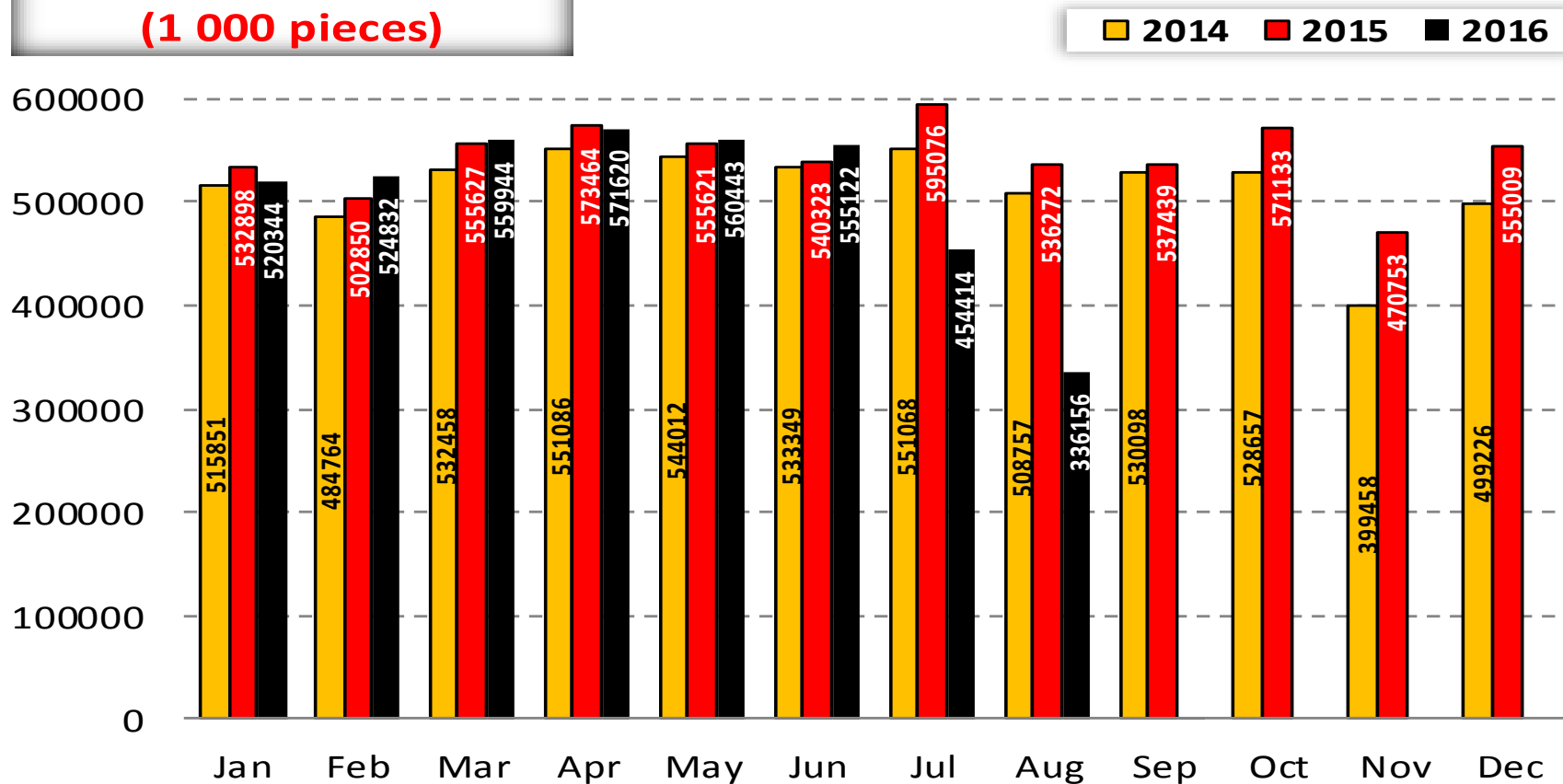


	FR	ES	IT	BE	CZ	PT	NL	EL	PL	SK	AT	BG	UK	DE	HU	SE	RO	DK	FI	LT	HR	IE	CY	LV	EE	SI	MT	EU
2016	79.0	53.0	55.0	10.0	0.0	6.2	0.0	5.0	0.0	3.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	212.6
16/15	-2.5%	-15.9%	+0.0%	+0.0%	+0.0%	+10.7%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%														-12.4%
2017	77.5	50.0	55.0	10.0	0.0	6.2	0.0	5.0	0.0	3.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	208.1	
17/16	-1.9%	-5.7%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%	+0.0%											-1.6%					-2.1%

Change in Poultry slaughter - July 2015/ July 2016



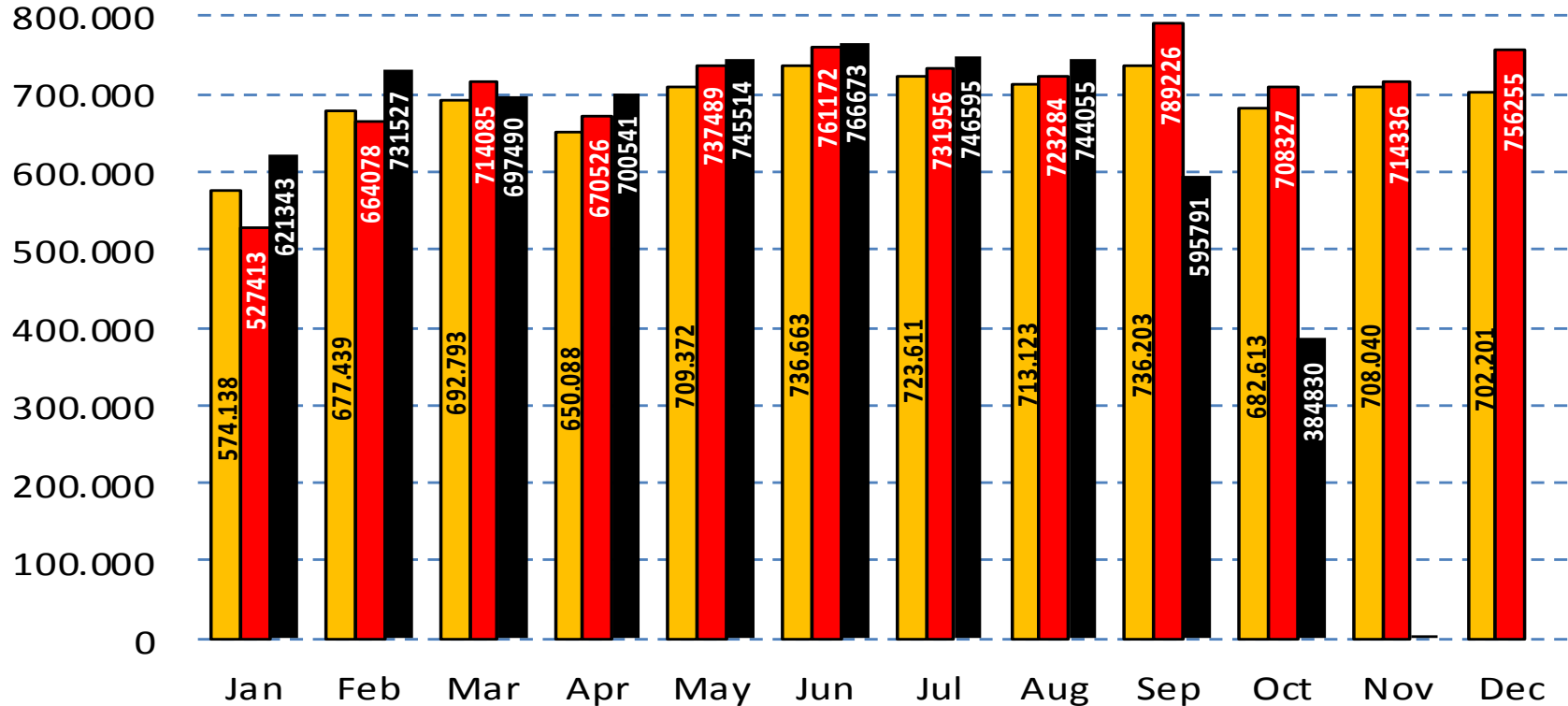
Placings of broiler chicks (1 000 pieces)





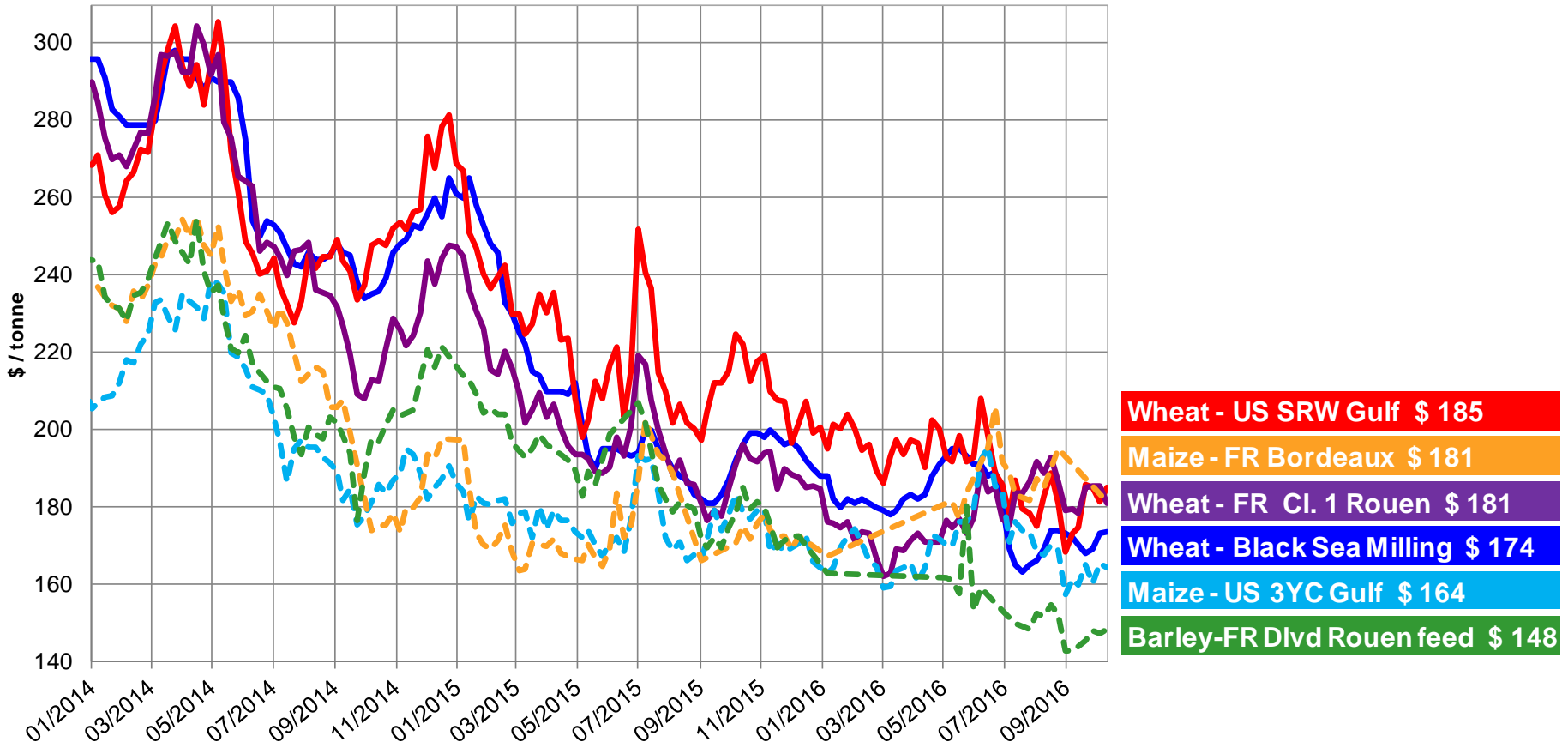
Forecast and Production of broiler (In tonnes)

2014 2015 2016



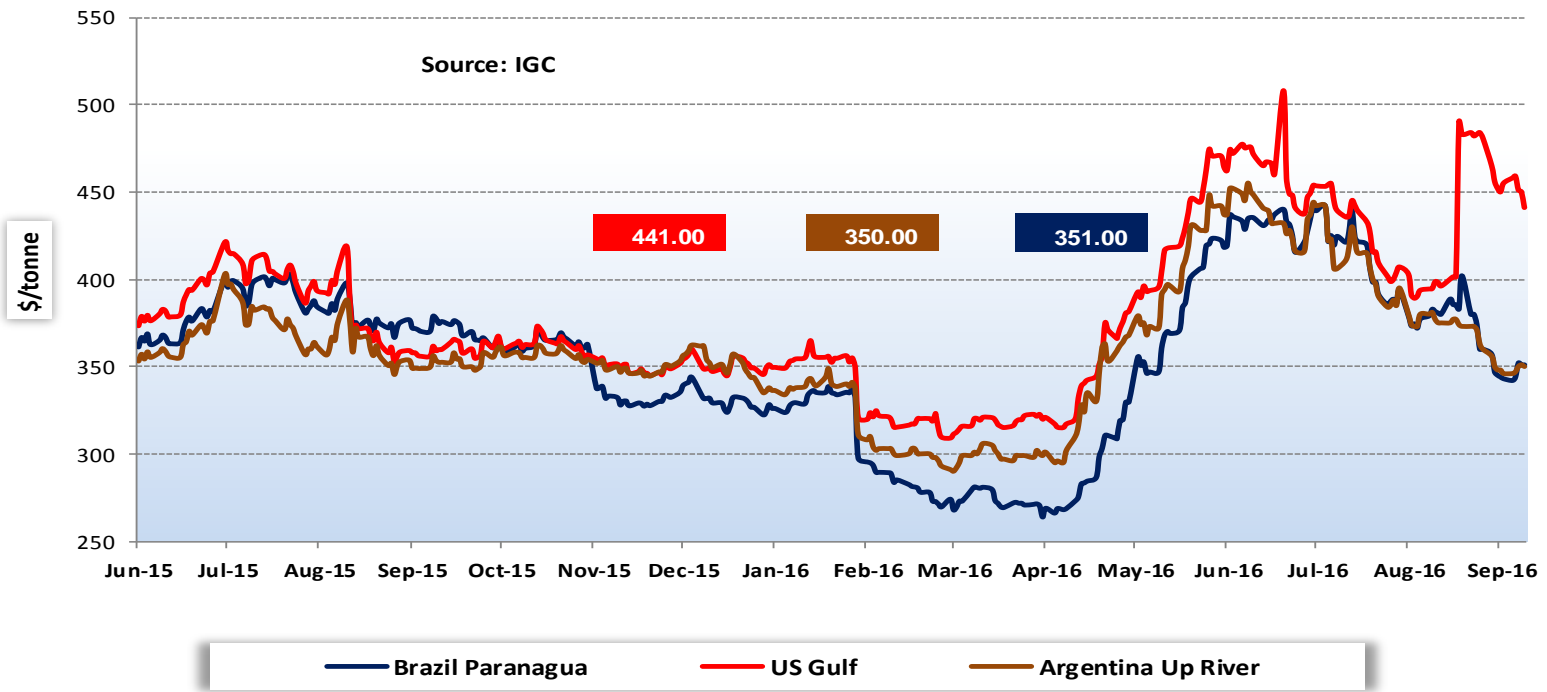


World cereal prices (\$/t)





Soyameal world quotations US\$/tonne



PRICES



European
Commission

EVOLUTION SINCE

EU
WEEK PRICES **41**

last WEEK

last MONTH

last YEAR

BROILER

175.13

€/100 kg carcass weight

+ 0.2%

- 0.2%

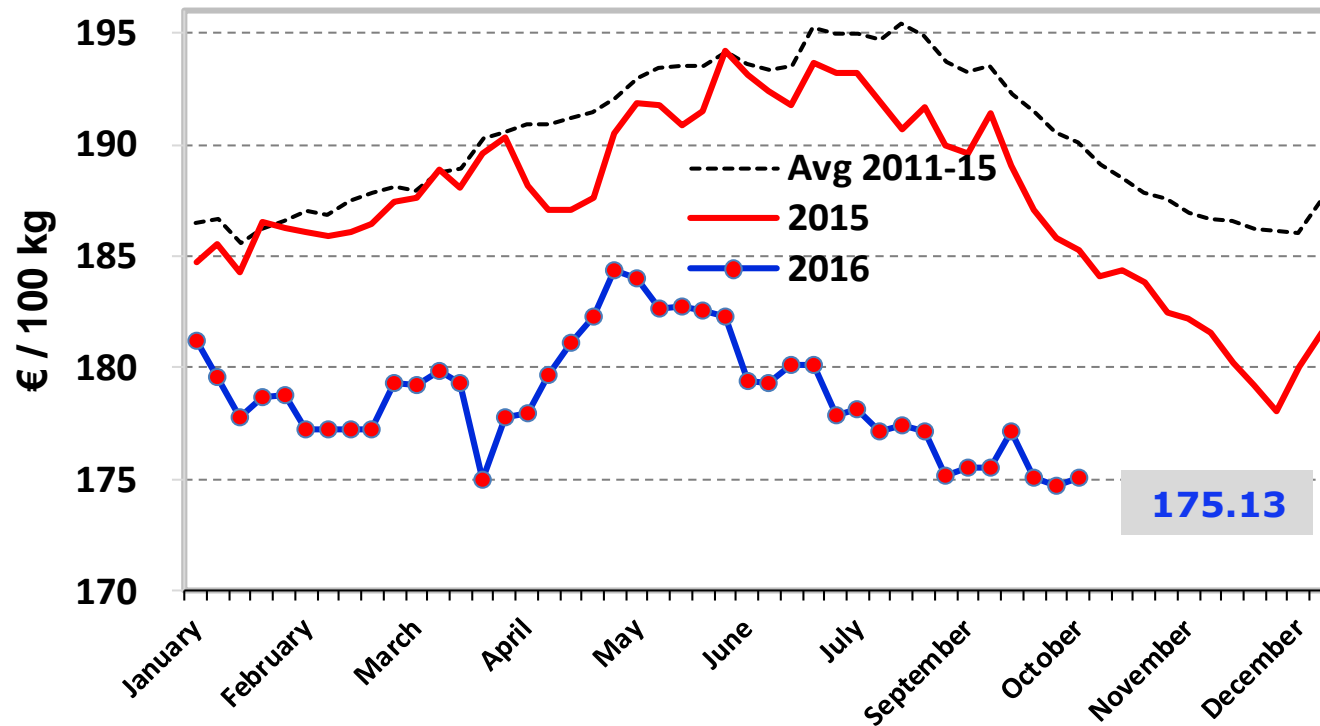
- 5.5%

Prices

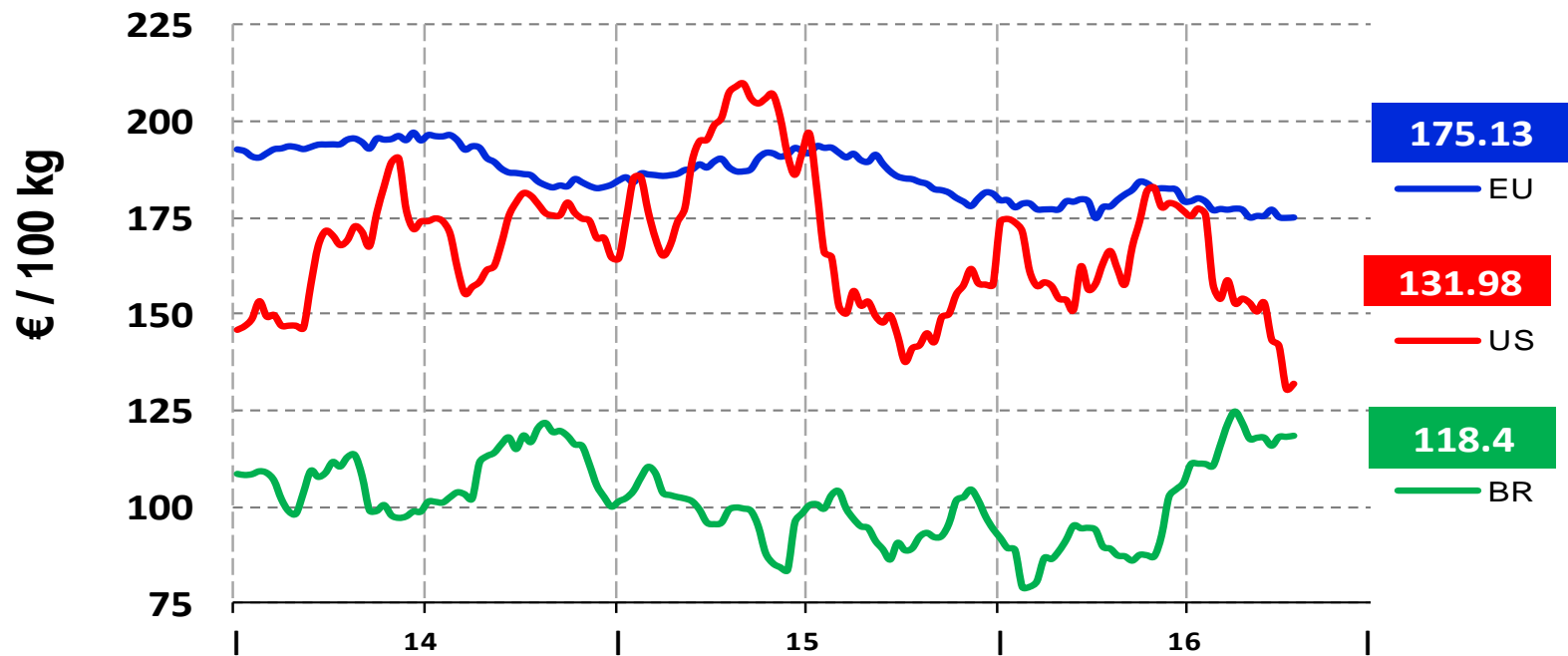


European
Commission

BROILER EU WEEKLY AVERAGE PRICE EVOLUTION



EU, USA & BRAZIL BROILER PRICES





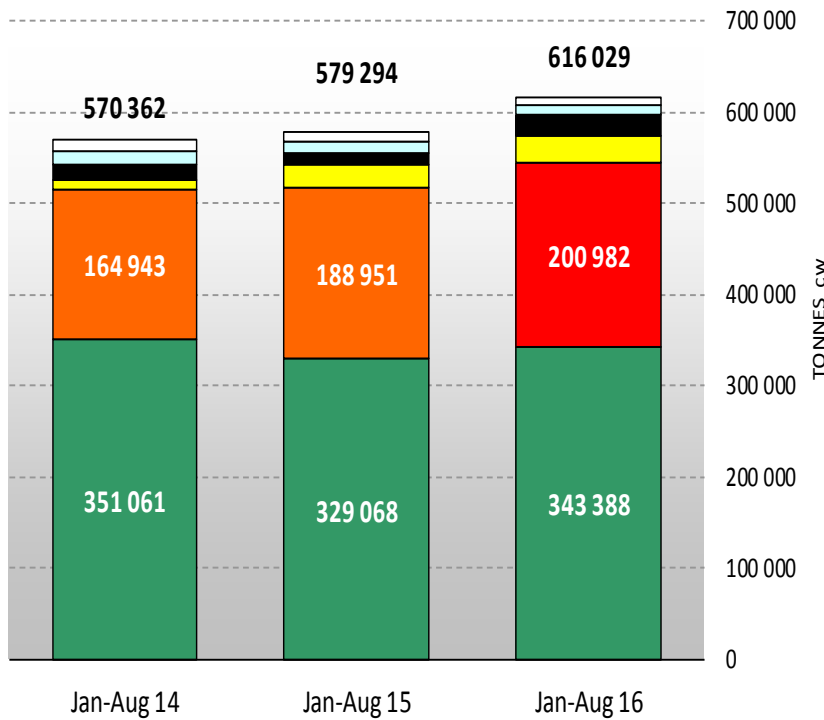
Imports of Poultry meat from selected origins

	2012		2013		2014		2015		Jan-Aug 16		Compared to Jan-Aug 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	570 574	66.7%	506 374	62.7%	507 355	60.0%	498 869	57.2%	343 388	55.7%	+ 4%
Thailand	197 962	23.2%	228 238	28.3%	251 185	29.7%	274 507	31.5%	200 982	32.6%	+ 6%
Ukraine			276	0.0%	19 958	2.4%	42 412	4.9%	30 065	4.9%	+ 20%
Chile	42 192	4.9%	30 515	3.8%	25 815	3.1%	22 232	2.5%	22 199	3.6%	+ 72%
China	15 698	1.8%	18 145	2.2%	19 761	2.3%	18 396	2.1%	11 193	1.8%	- 6%
Argentina	13 766	1.6%	10 783	1.3%	10 996	1.3%	8 529	1.0%	4 335	0.7%	- 27%
Switzerland	3 812	0.4%	3 817	0.5%	4 307	0.5%	2 428	0.3%	1 558	0.3%	- 9%
Israel	6 075	0.7%	6 306	0.8%	2 411	0.3%	1 285	0.1%	1 098	0.2%	+ 17%
Others	4 969	0.6%	2 820	0.3%	3 956	0.5%	3 697	0.4%	1 212	0.2%	
Extra-EU	855 048		807 274		845 743		872 356		616 029		
% change			- 5.6%		+ 4.8%		+ 3.1%		+ 6.3%		

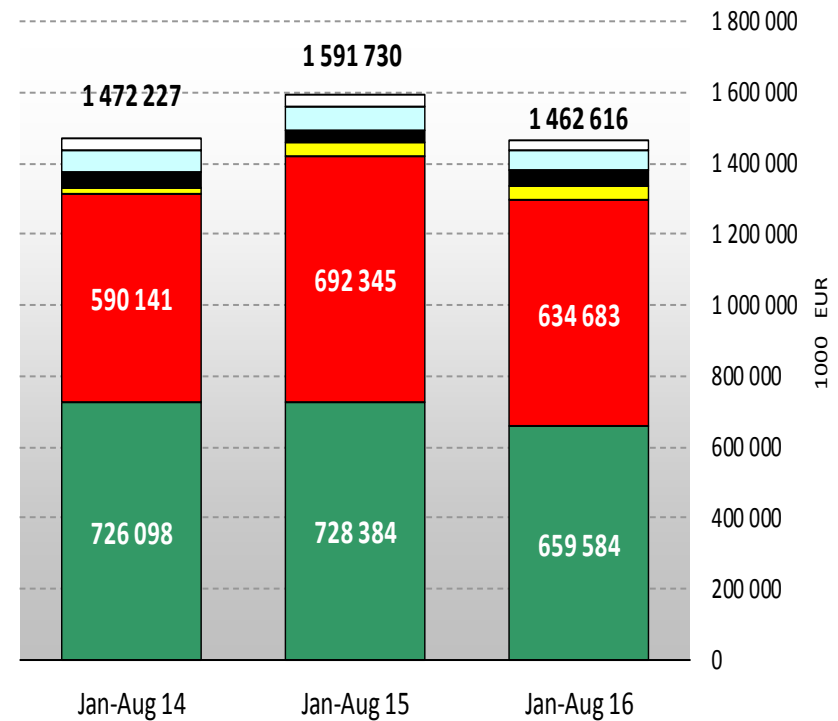


EU Poultry meat Imports

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (1000 EUR)



Legend: Brazil (Green), Thailand (Orange), Ukraine (Yellow), Chile (Black), China (Light Blue), Other origins (White)

Legend: Brazil (Green), Thailand (Red), Ukraine (Yellow), Chile (Black), China (Light Blue), Other origins (White)

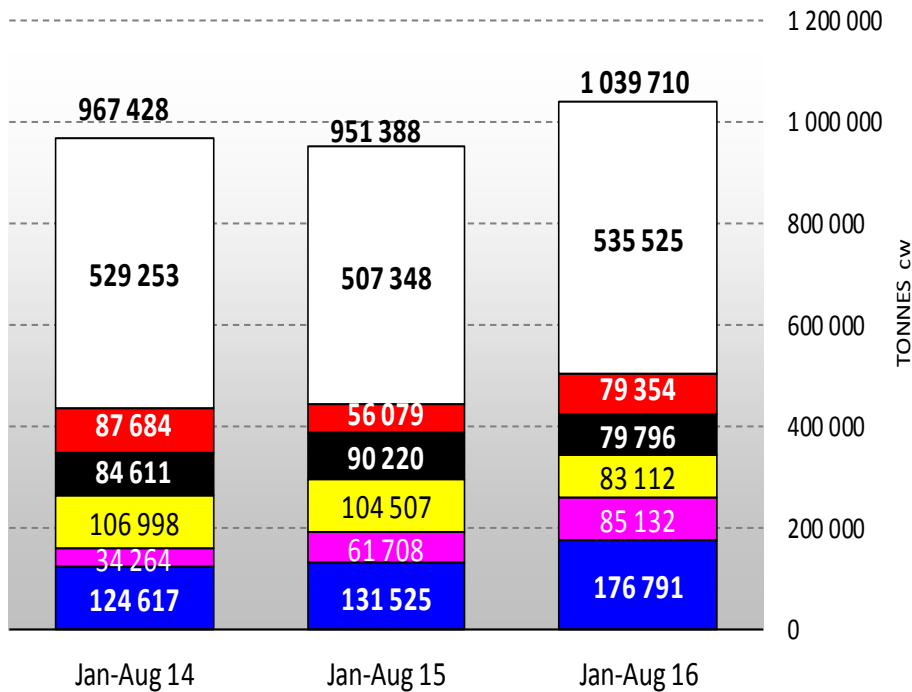
Exports of Poultry Meat to Selected Destinations

	2012		2013		2014		2015		Jan-Aug 16		Compared to Jan-Aug 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
South Africa	131 832	9.2%	158 548	11.1%	203 412	13.5%	213 413	14.3%	176 791	17.0%	+ 34%
Philippines	30 764	2.1%	35 696	2.5%	57 641	3.8%	101 245	6.8%	85 132	8.2%	+ 38%
Benin	139 817	9.8%	139 247	9.7%	163 844	10.9%	136 601	9.2%	83 112	8.0%	- 20%
Saudi Arabia	149 310	10.4%	154 787	10.8%	123 574	8.2%	142 496	9.6%	79 796	7.7%	- 12%
Hong Kong	125 831	8.8%	116 963	8.2%	136 177	9.1%	101 090	6.8%	79 354	7.6%	+ 42%
Ukraine	103 427	7.2%	75 965	5.3%	80 084	5.3%	90 886	6.1%	65 233	6.3%	+ 34%
Ghana	69 156	4.8%	75 252	5.3%	56 900	3.8%	68 799	4.6%	50 105	4.8%	+ 7%
Vietnam	19 078	1.3%	13 564	0.9%	19 884	1.3%	27 219	1.8%	23 681	2.3%	+ 27%
Malaysia	24 386	1.7%	28 748	2.0%	27 142	1.8%	25 727	1.7%	22 715	2.2%	+ 23%
Congo (Dem. Rep.)	34 231	2.4%	28 625	2.0%	33 697	2.2%	36 061	2.4%	21 987	2.1%	- 5%
Russia	113 134	7.9%	95 200	6.7%	68 363	4.5%	1 235	0.1%	764	0.1%	+ 4%
Other Destinations	490 160	34.3%	505 861	35.4%	533 265	35.5%	546 234	36.6%	351 039	33.8%	
Extra-EU	1 431 125		1 428 457		1 503 984		1 491 007		1 039 710		
% change			- 0.2%		+ 5.3%		- 0.9%		+ 9.3%		

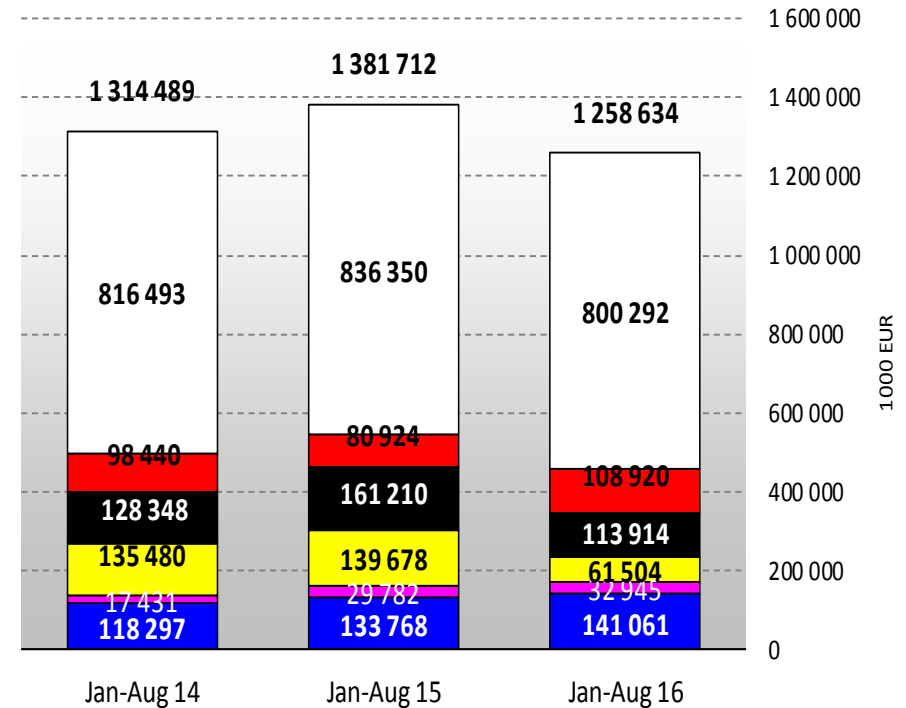


EU Poultry meat Export

EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (1000 EUR)



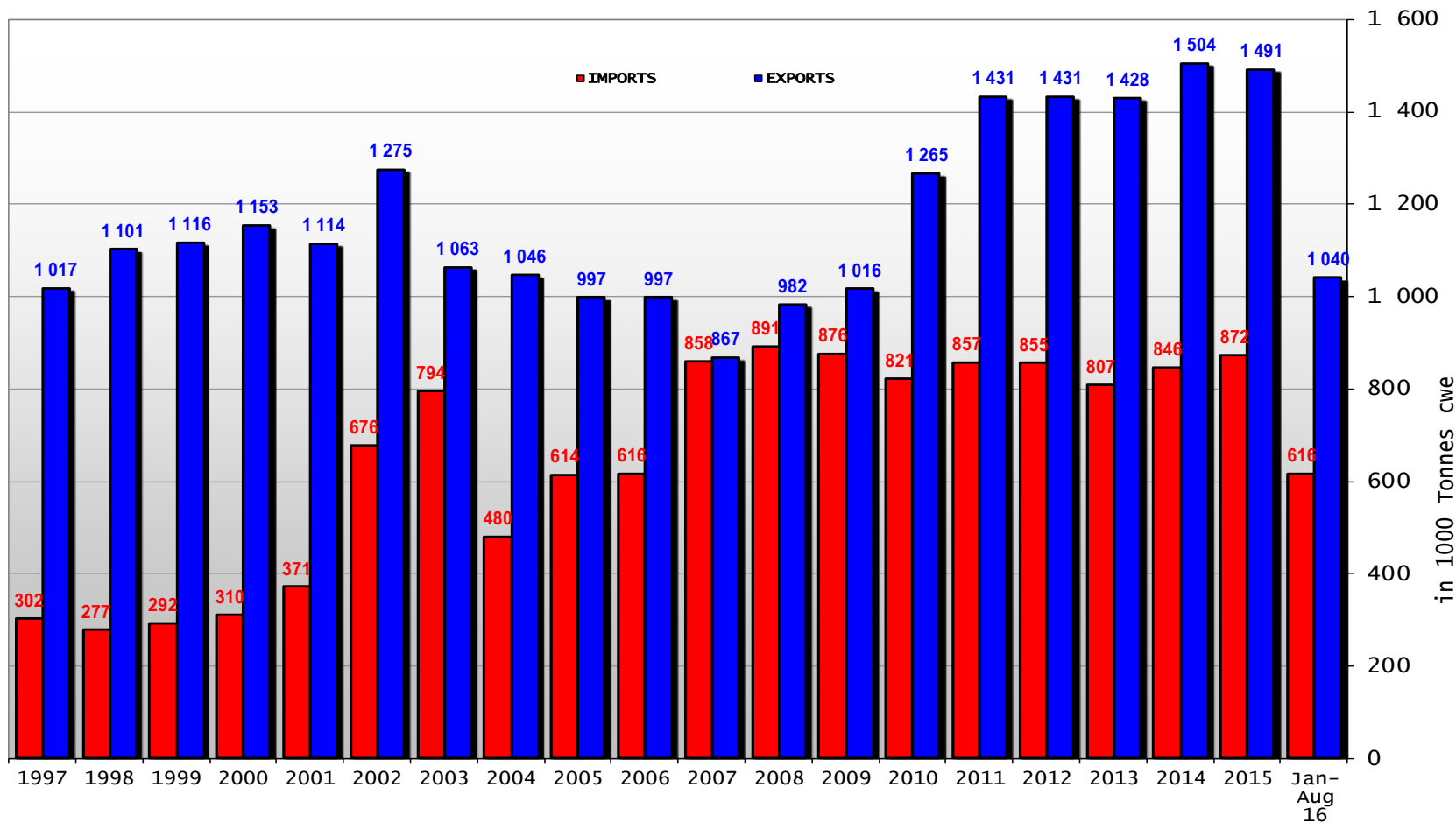
■ South Africa ■ Philippines ■ Benin ■ Saudi Arabia ■ Hong Kong □ Other destinations *

■ South Africa ■ Philippines ■ Benin ■ Saudi Arabia ■ Hong Kong □ Other destinations *

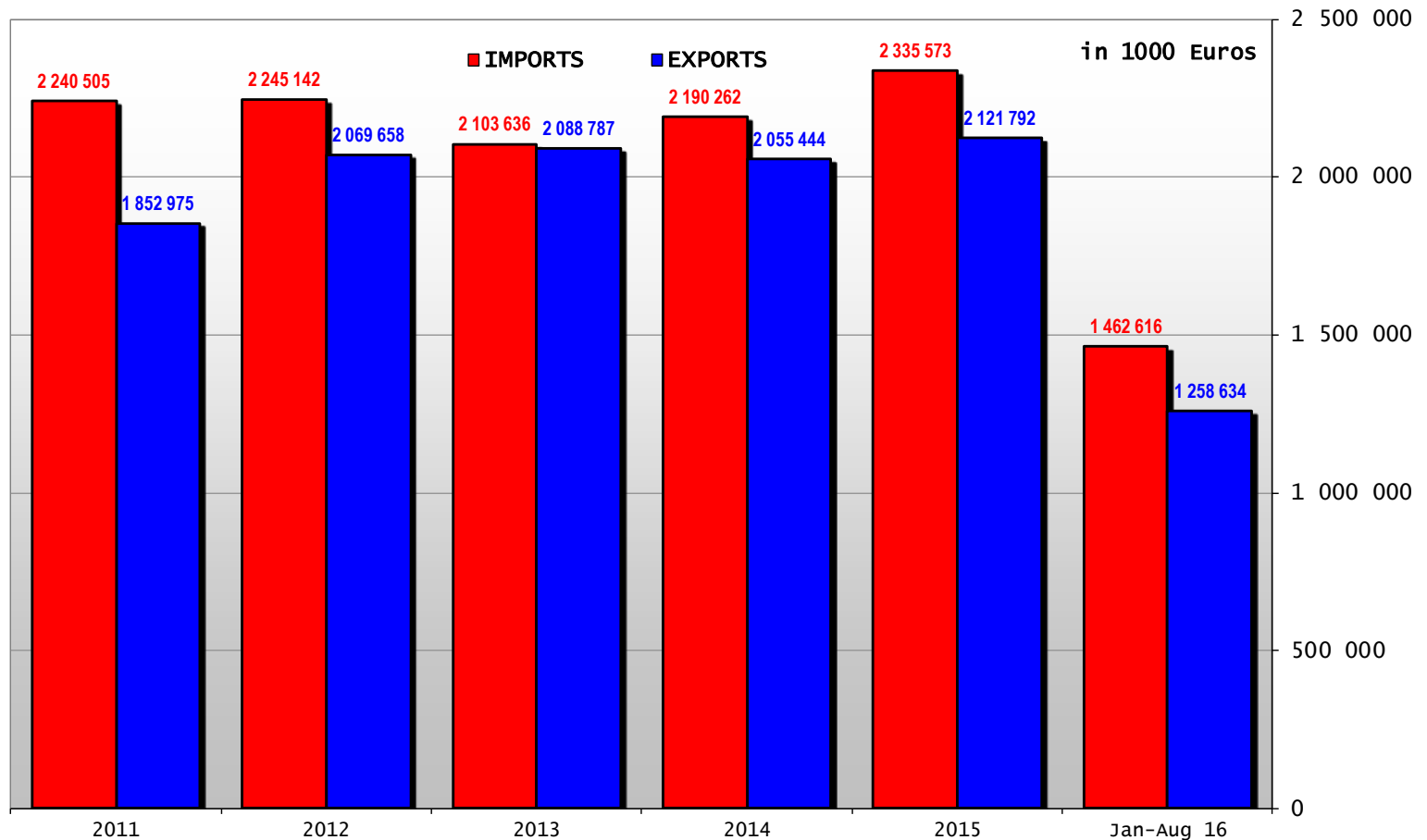
* countries trading less than 1 259 000 ('000 EUR)



EU Poultry meat Trade Balance



EU Poultry meat trade balance (in 1000 euros)



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
- Poultry dashboard
- http://ec.europa.eu/agriculture/dashboards/poultry-meat-dashboard_en.pdf

DG AGRI DASHBOARD : POULTRY MEAT

Last update: 30.09.2016

EU WEEK PRICES **38**

BROILER **176.85**

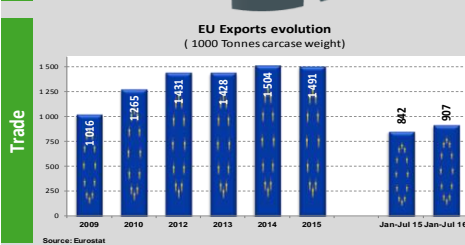
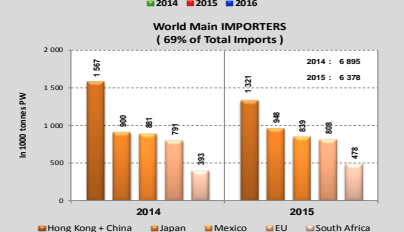
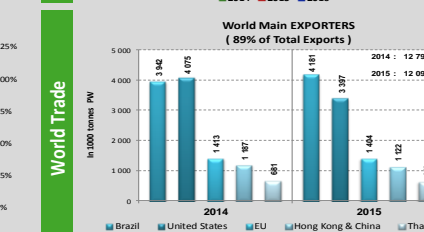
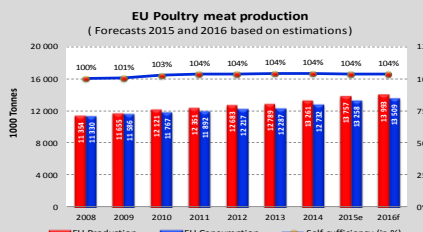
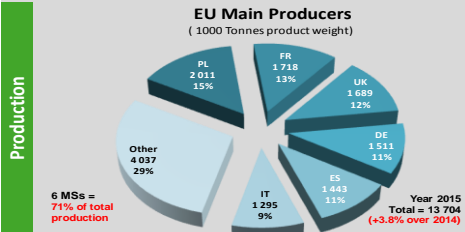
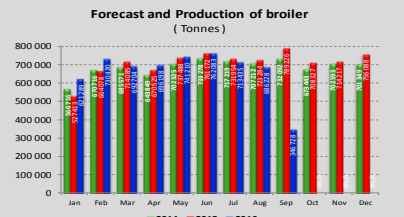
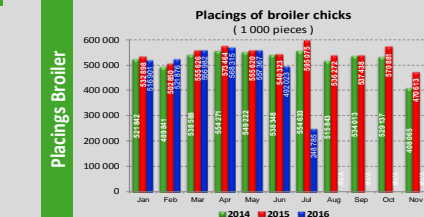
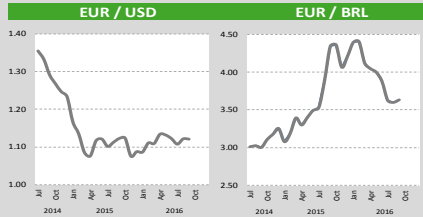
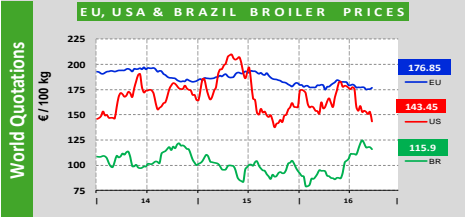
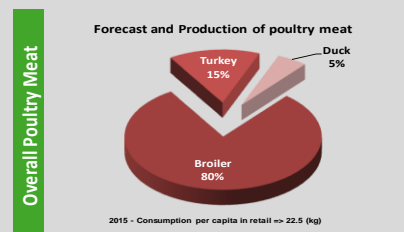
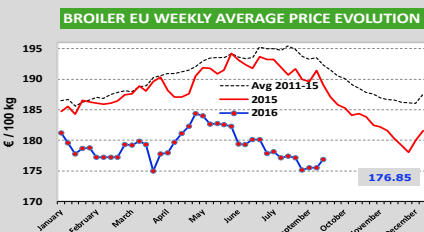
€/100 kg carcass weight

EVOLUTION SINCE

last WEEK: +0.7%

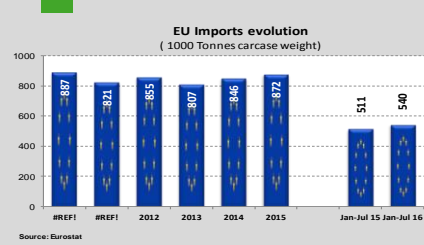
last MONTH: -0.2%

last YEAR: -6.4%



EU-28 EXPORTS (Top Destinations in 2015 / 16)

Period:	2015	Jan-Jul 2016	% Chg
EU-28	841 911	907 073	+7.7%
South Africa	113 998	156 639	+37.4%
Benin	100 032	77 777	-22.2%
Philippines	55 090	73 169	+32.8%
Hong Kong	49 933	69 552	+39.3%
Saudi Arabia	80 384	69 528	-13.5%
Ukraine	41 275	55 563	+34.6%
Ghana	39 845	41 701	+4.7%
Other	361 354	363 143	+0.5%



EU-28 IMPORTS (Main Partners in 2015 / 16)

Period:	2015	Jan-Jul 2016	% Chg
EU-28	510 981	540 069	+5.7%
Brazil	286 879	299 038	+4.2%
Thailand	170 843	180 475	+5.6%
Ukraine	21 021	24 052	+14.4%
Chile	11 572	19 522	+68.7%
China	10 475	9 800	-6.4%
Argentina	5 212	3 674	-29.5%
Switzerland	1 523	1 404	-7.8%
Other	3 356	2 103	-37.3%

Sources : European Commission (DG ESTAT, DG AGRI), MSs notifications (Regulation (EC) 1249/2008 and Regulation (EC) 617/2008), GTA.