

EU Market Situation for Poultry

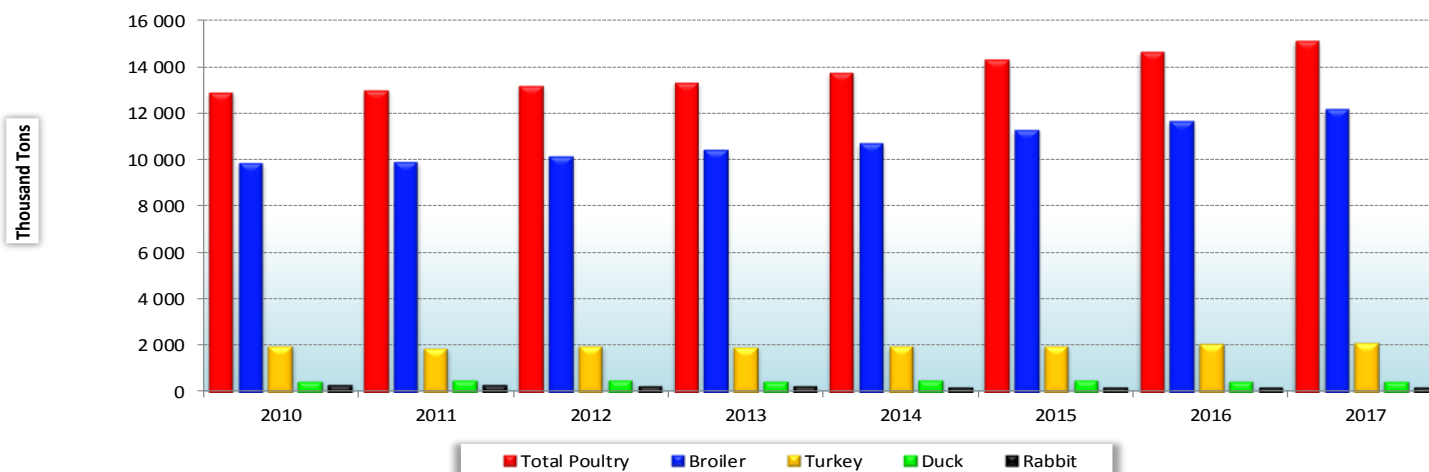
**Civil Dialogue Group
on Eggs & Poultry**

17 February 2017



Experts EU production forecast on Poultry and Rabbit

(Missing or incomplete data (BE-EL-LT-AT-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	14 325	14 688	15 127	+ 3.8%	+ 2.5%	+ 3.0%
Broiler	9 876	9 932	10 173	10 445	10 729	11 295	11 689	12 189	+ 5.3%	+ 3.5%	+ 4.3%
Turkey	1 976	1 878	1 967	1 935	1 964	1 967	2 101	2 118	+ 0.2%	+ 6.8%	+ 0.8%
Duck	481	500	500	485	512	503	490	454	- 1.8%	- 2.5%	- 7.3%
Rabbit	329	328	281	260	246	243	237	230	- 1.3%	- 2.3%	- 3.2%

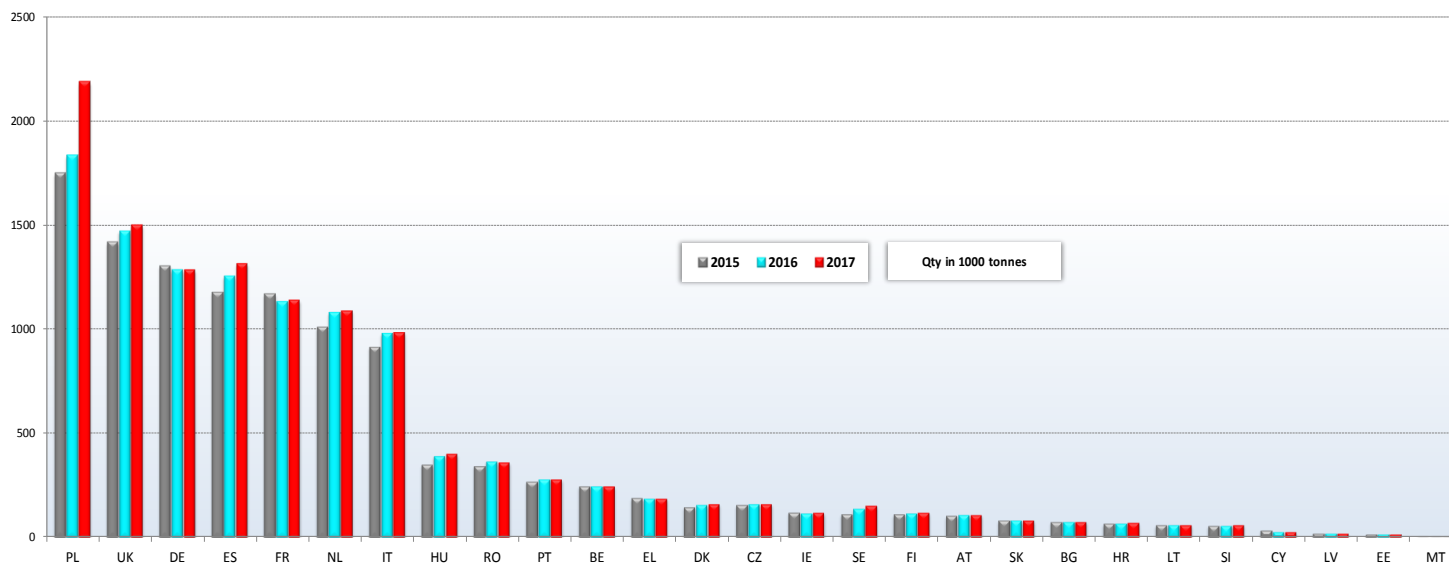
Experts EU production forecast of Poultry Meat



Poland's data is the average of data reported by Industry and Copia

	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	2 315	1 828	1 795	1 666	1 457	1 387	1 097	616	374	336	250	192	175	156	137	131	121	119	102	86	141	81	61	24	21	15	6	14 688
16/15	+ 4.7%	- 2.1%	- 0.3%	+ 2.5%	+ 1.5%	+ 6.1%	+ 3.8%	+ 8.6%	+ 6.1%	+ 0.6%	+ 0.0%	+ 1.1%	+ 3.1%	+ 6.1%	+ 5.8%	- 1.4%	+ 3.7%	+ 0.0%	+ 0.0%	+ 0.0%	+ 20.2%	+ 5.6%	+ 1.5%	- 18.3%	+ 0.0%	+ 0.0%	+ 0.0%	+ 2.5%
2017	2 709	1 838	1 789	1 699	1 495	1 390	1 100	560	370	342	250	192	175	161	137	132	126	119	102	86	141	83	65	25	21	15	6	15 127
17/16	+ 17.0%	+ 0.5%	- 0.3%	+ 2.0%	+ 2.6%	+ 0.2%	+ 0.3%	- 9.0%	- 1.1%	+ 1.8%	+ 0.0%	+ 0.0%	+ 0.0%	+ 3.2%	+ 0.0%	+ 1.1%	+ 4.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 2.2%	+ 6.6%	+ 3.3%	+ 0.0%	+ 0.0%	+ 0.0%	+ 3.0%

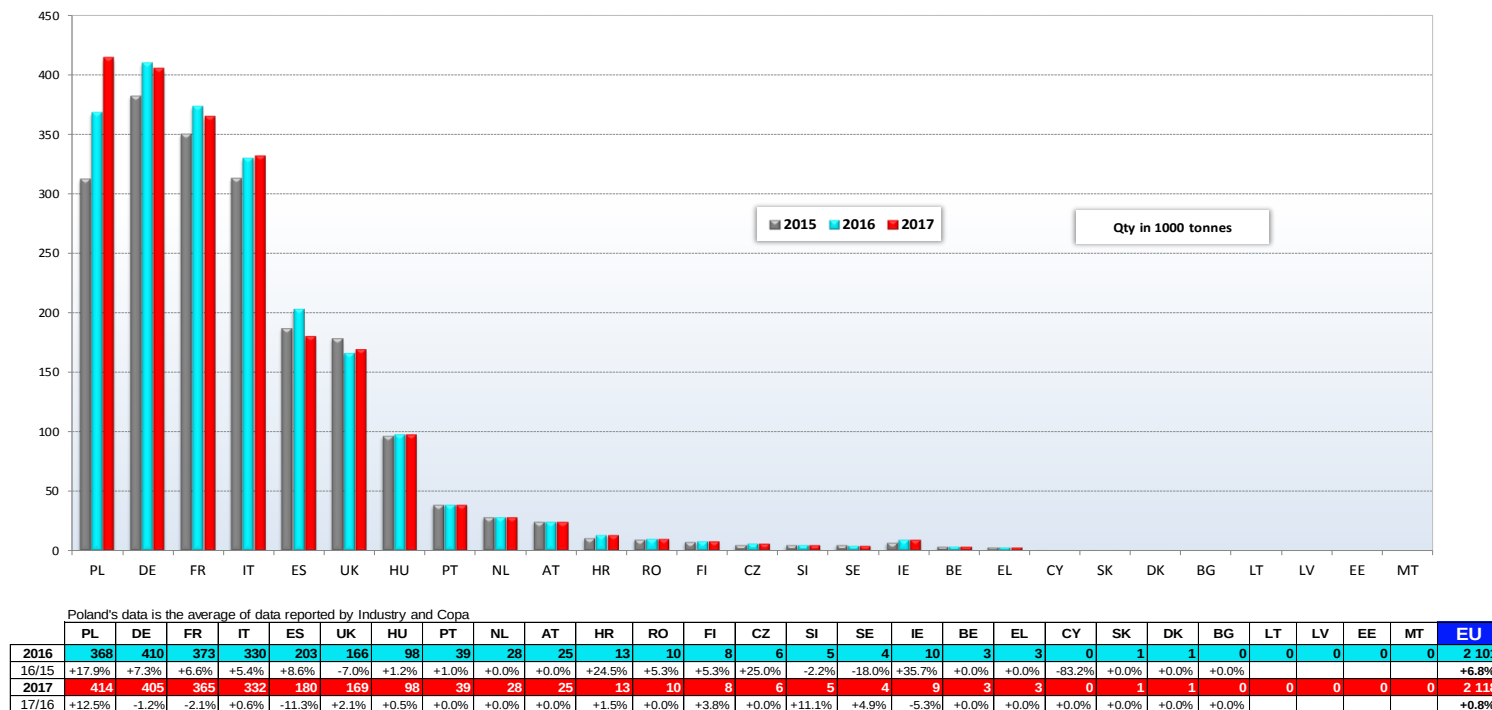
Experts EU production forecast of Broiler Meat



Poland's data is the average of data reported by Industry and Copia

	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	1 834	1 471	1 285	1 254	1 134	1 080	980	390	364	278	246	185	155	160	115	137	114	107	80	75	67	59	57	24	17	14	7	11 689
16/15	+ 4.9%	+ 3.8%	- 1.5%	+ 6.5%	- 3.1%	+ 7.0%	+ 7.1%	+ 11.8%	+ 6.1%	+ 3.3%	+ 0.0%	- 2.6%	+ 6.1%	+ 2.8%	- 4.2%	+ 21.4%	+ 3.6%	+ 4.7%	+ 0.0%	+ 0.0%	+ 2.7%	+ 0.0%	+ 0.9%	- 31.4%	+ 0.0%	+ 0.0%	+ 0.0%	+ 3.5%
2017	2 187	1 500	1 285	1 315	1 140	1 090	985	400	360	278	246	185	160	160	117	151	118	107	80	75	69	59	60	25	17	14	7	12 189
17/16	+ 19.2%	+ 2.0%	+ 0.0%	+ 4.9%	+ 0.5%	+ 0.9%	+ 0.5%	+ 2.5%	- 1.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 3.2%	+ 0.0%	+ 1.7%	+ 10.1%	+ 4.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 2.4%	+ 0.0%	+ 6.2%	+ 2.1%	+ 0.0%	+ 0.0%	+ 0.0%	+ 4.3%

Experts EU production forecast of Turkey Meat



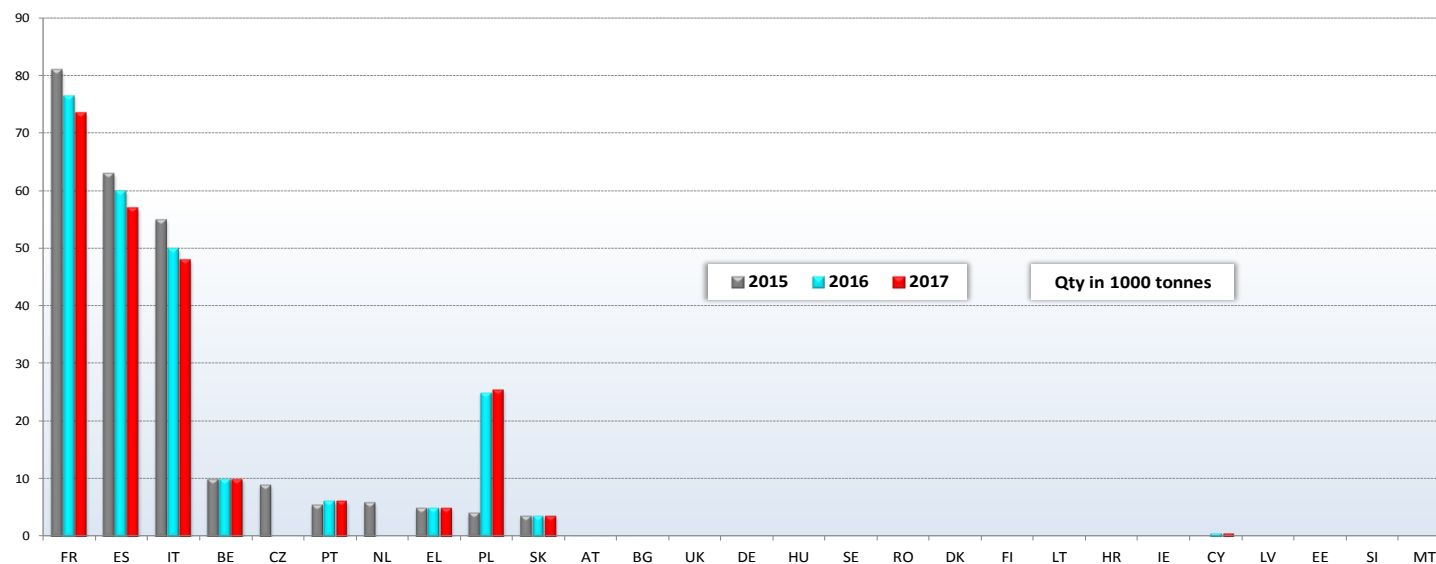
Experts EU production forecast of Duck Meat



Poland's data is the average of data reported by Industry and Copa

	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	204	91	49	45	29	22	17	10	8	7	6	2	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	490
16/15	-11.7%	+13.5%	-2.8%	+14.5%	-1.7%	+0.0%	+6.3%	+2.0%	-3.6%	-22.2%	+11.1%	+20.0%	+0.0%	-5.5%	+0.0%	+0.0%	+0.0%	-100.0%	-100.0%									-2.5%
2017	215	40	48	49	29	22	18	10	8	6	6	2	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	454
17/16	+5.4%	-55.9%	-1.0%	+9.2%	+0.0%	+0.0%	+5.9%	+0.0%	+0.0%	-14.3%	+0.0%	+11.1%	+0.0%	-3.6%	+0.0%	+0.0%	+0.0%											-7.3%

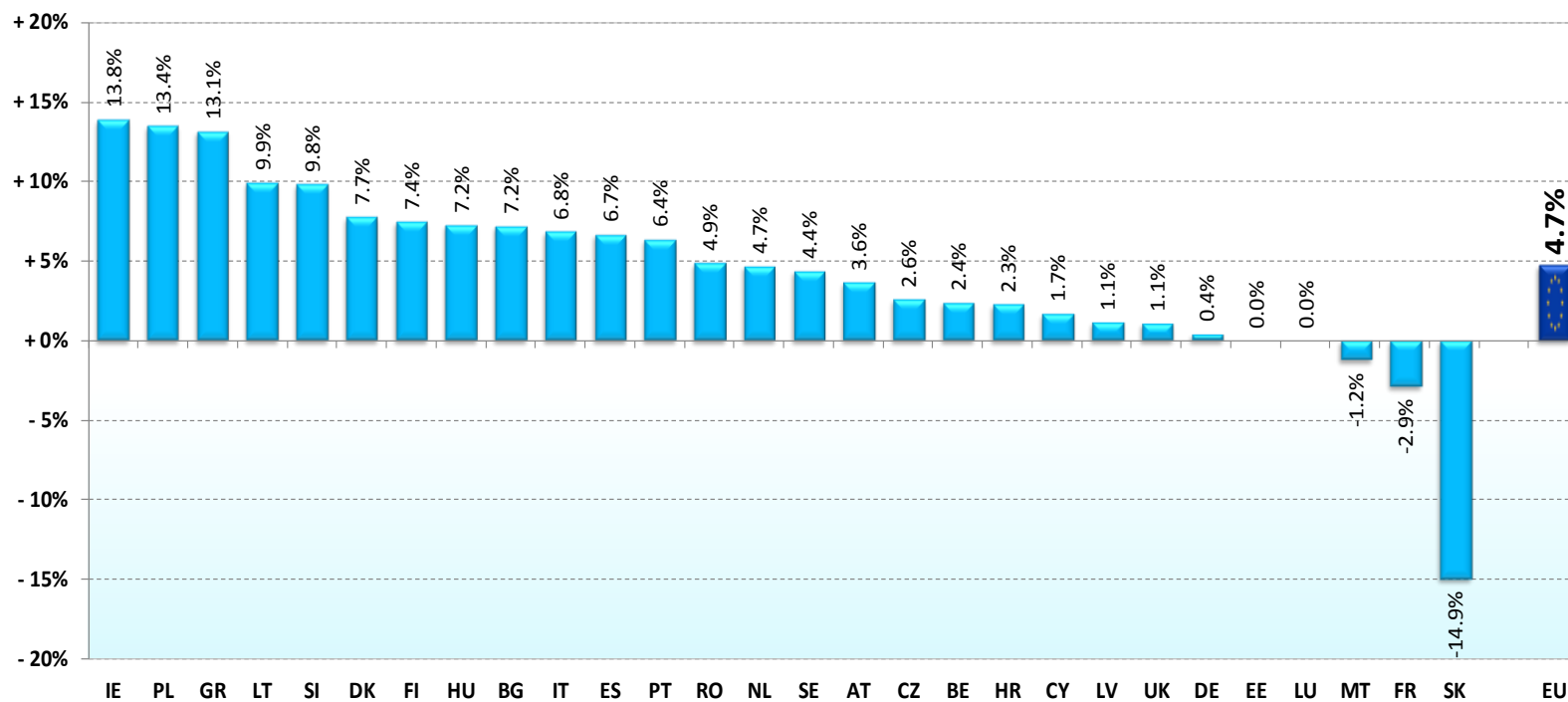
Experts EU production forecast of Rabbit Meat



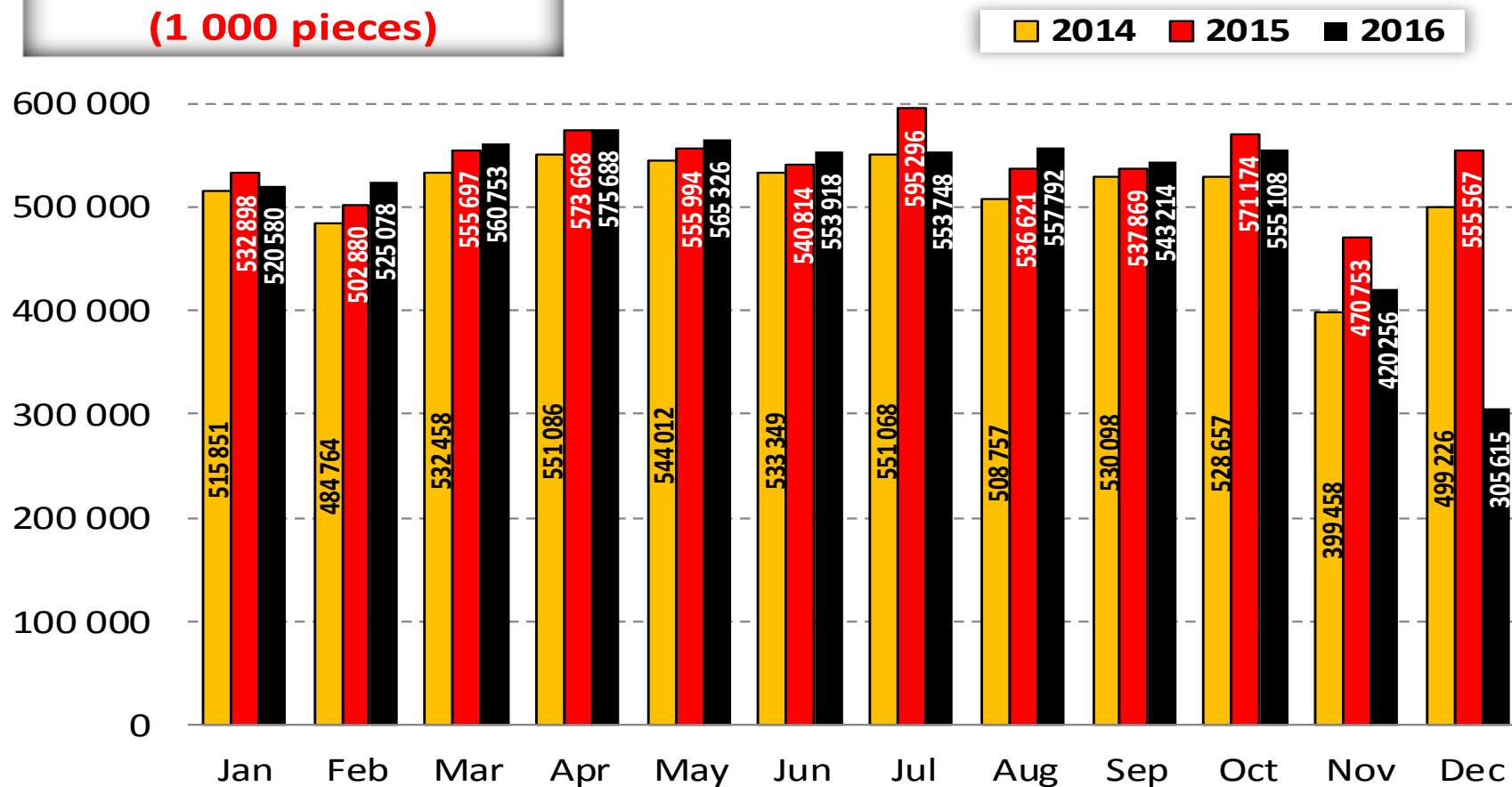
Poland's data is the average of data reported by Industry and Copa

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	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	77	60	50	10	0	6	0	5	25	4	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	237
16/15	- 5.6%	- 4.8%	- 9.1%	+ 0.0%	+ 0.0%	+ 10.7%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	#####																- 2.3%
2017	74	57	48	10	0	6	0	5	26	4	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	230
17/16	- 3.9%	- 5.0%	- 4.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%	+ 0.0%												- 1.6%					- 3.2%

Change in Poultry Slaughter - Oct 2015/ Oct 2016

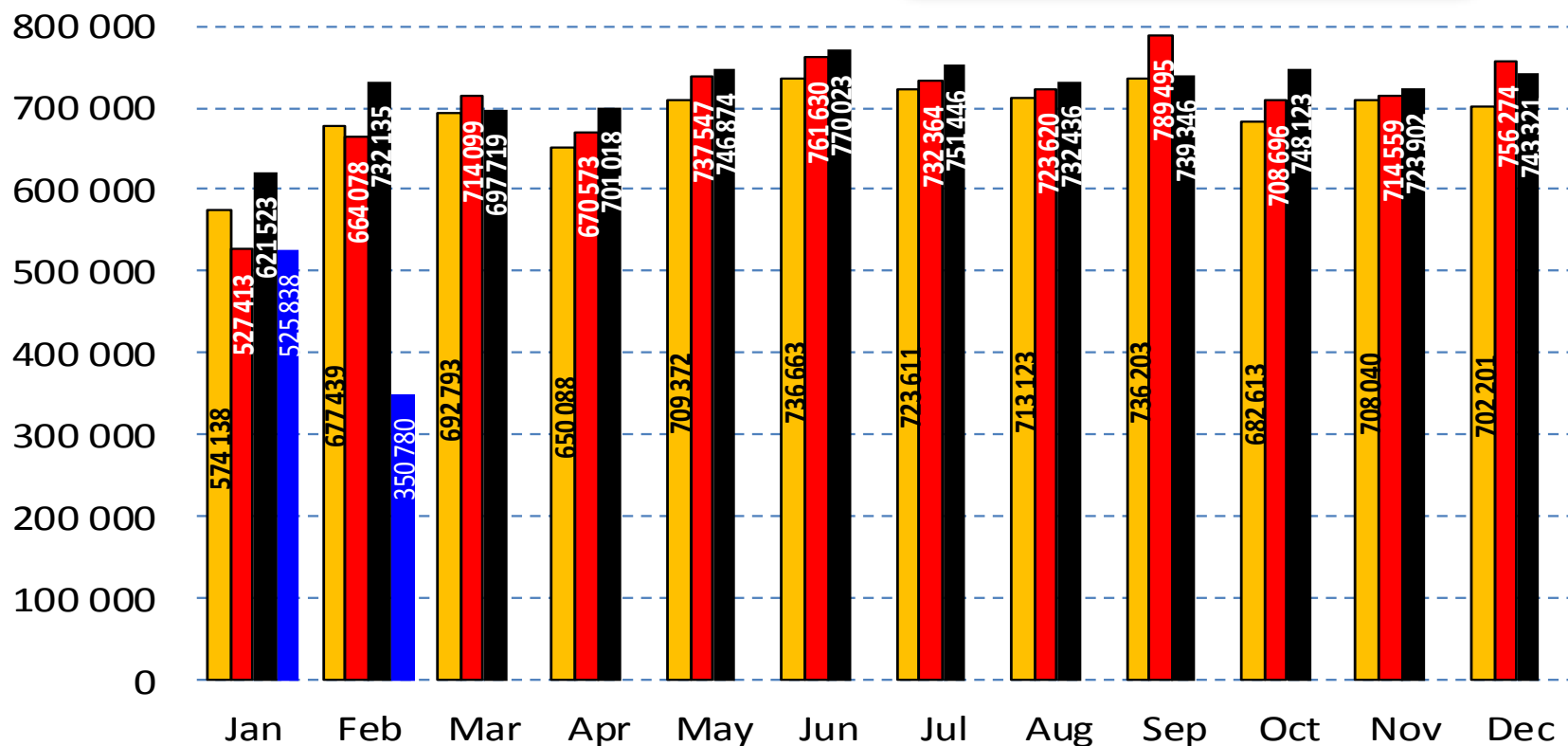


Placings of broiler chicks (1 000 pieces)

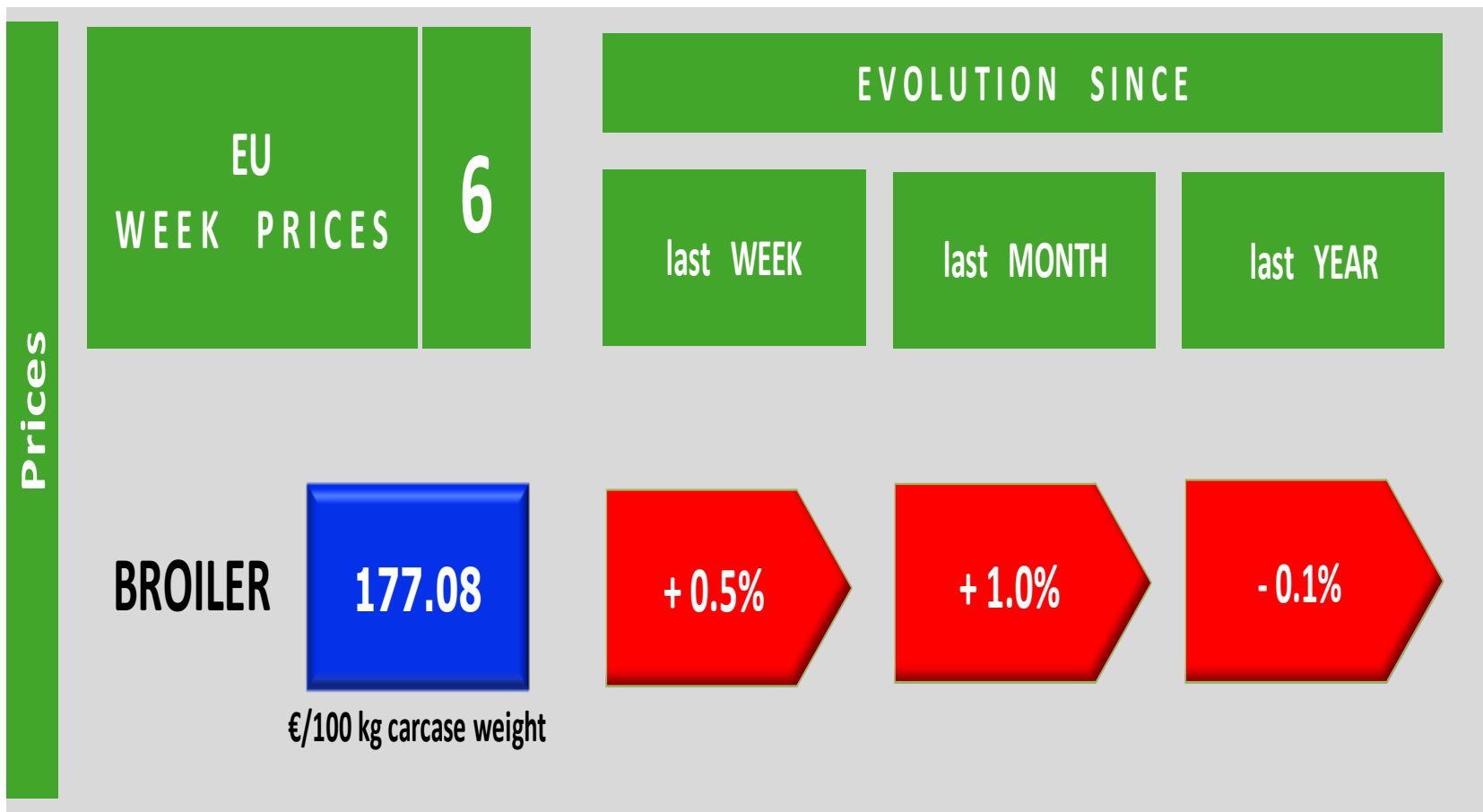


Forecast and Production of **broiler** (In tonnes)

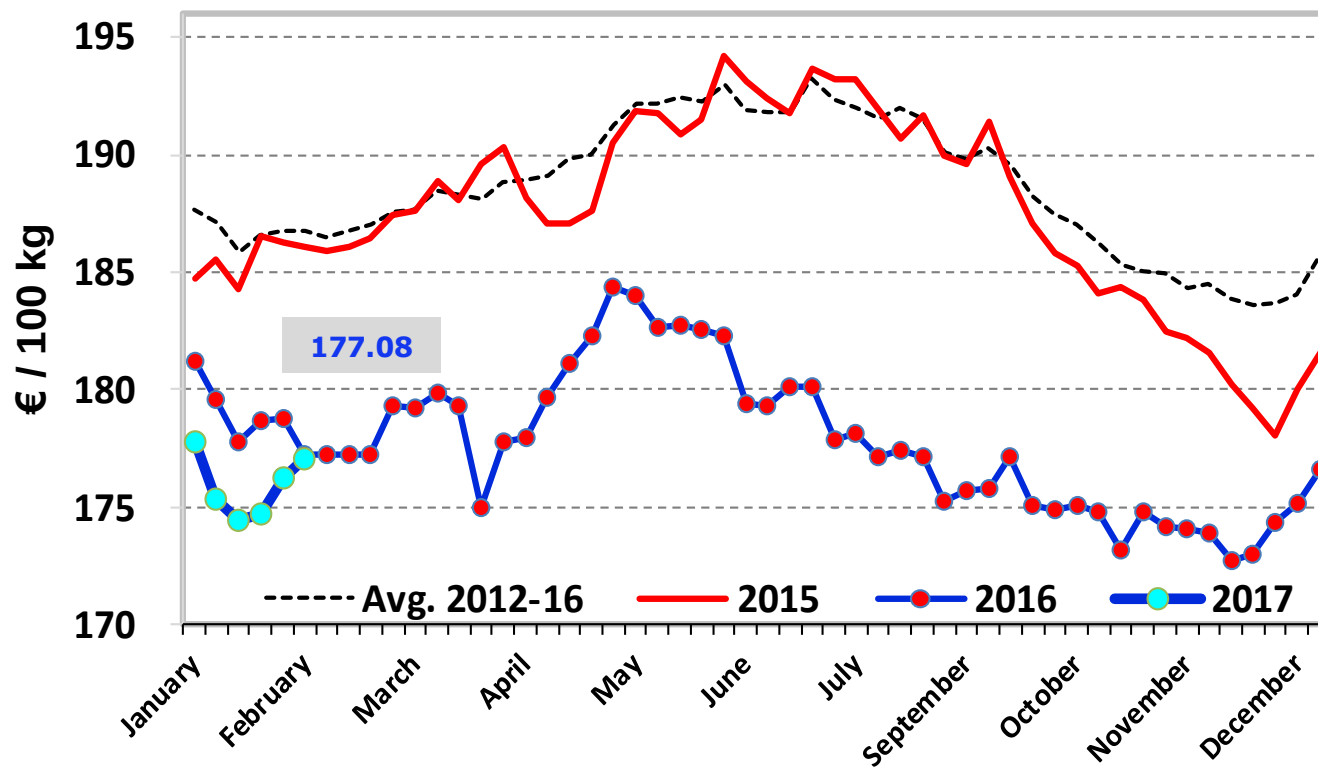
■ 2014 ■ 2015 ■ 2016 ■ 2017



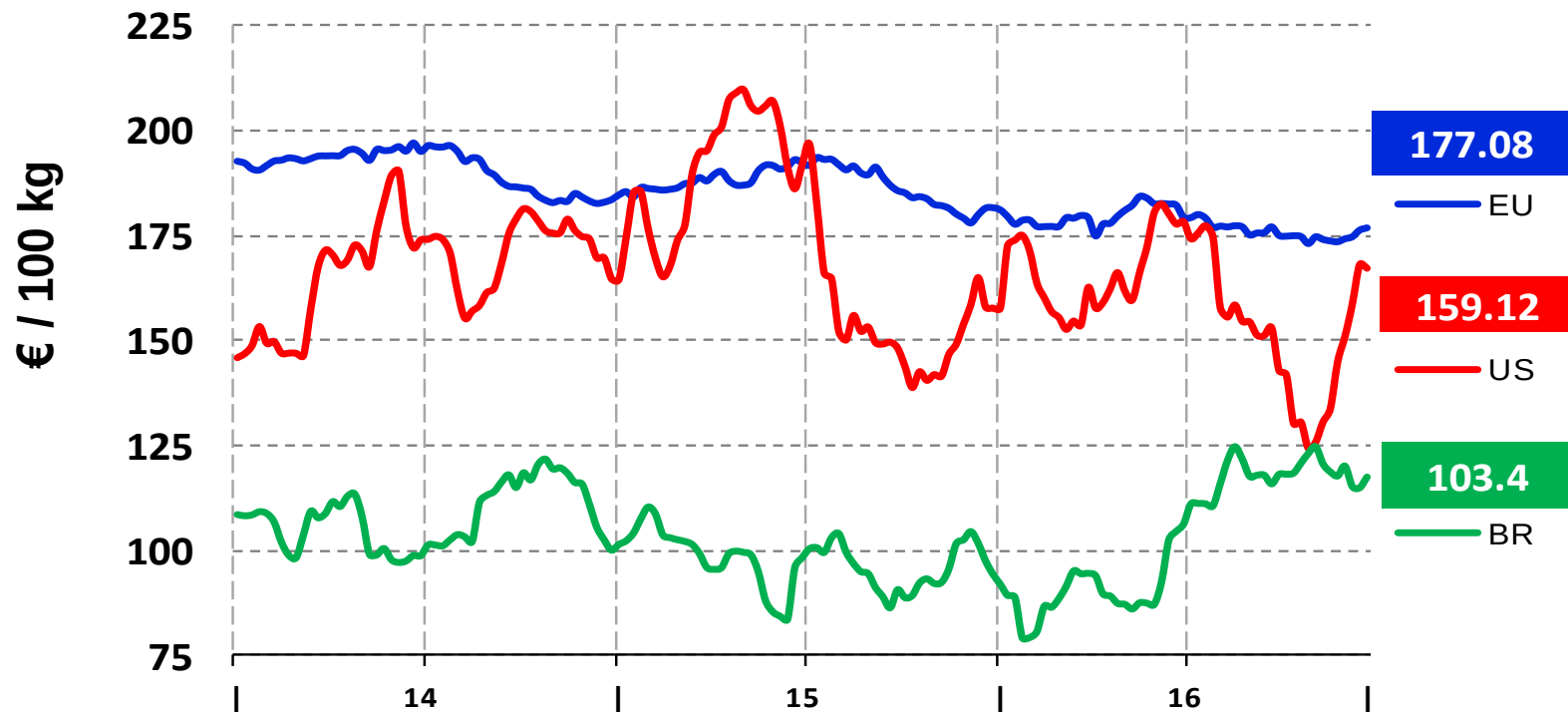
PRICES



BROILER EU WEEKLY AVERAGE PRICE EVOLUTION



EU, USA & BRAZIL BROILER PRICES

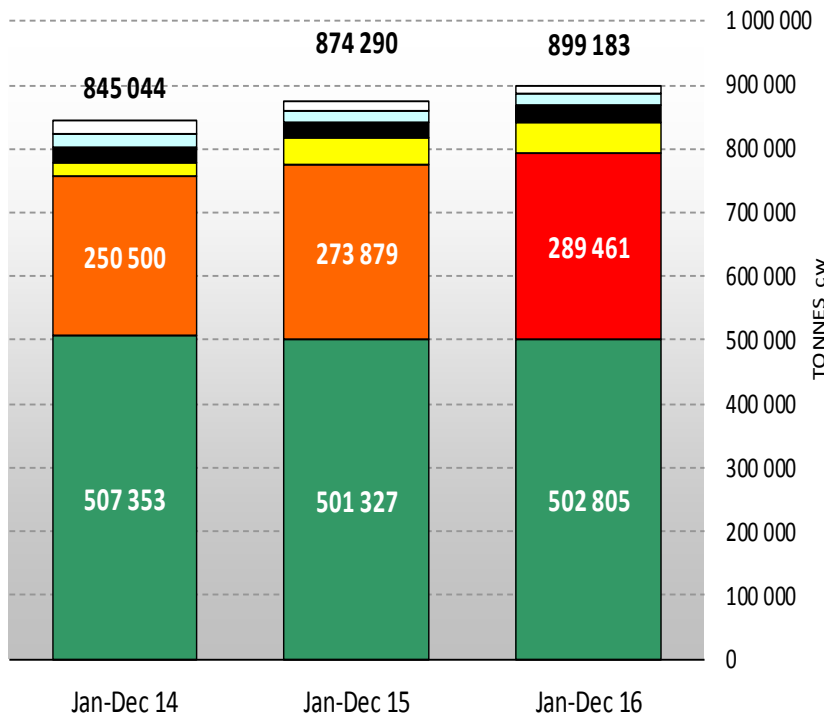


Imports of Poultry meat from selected origins

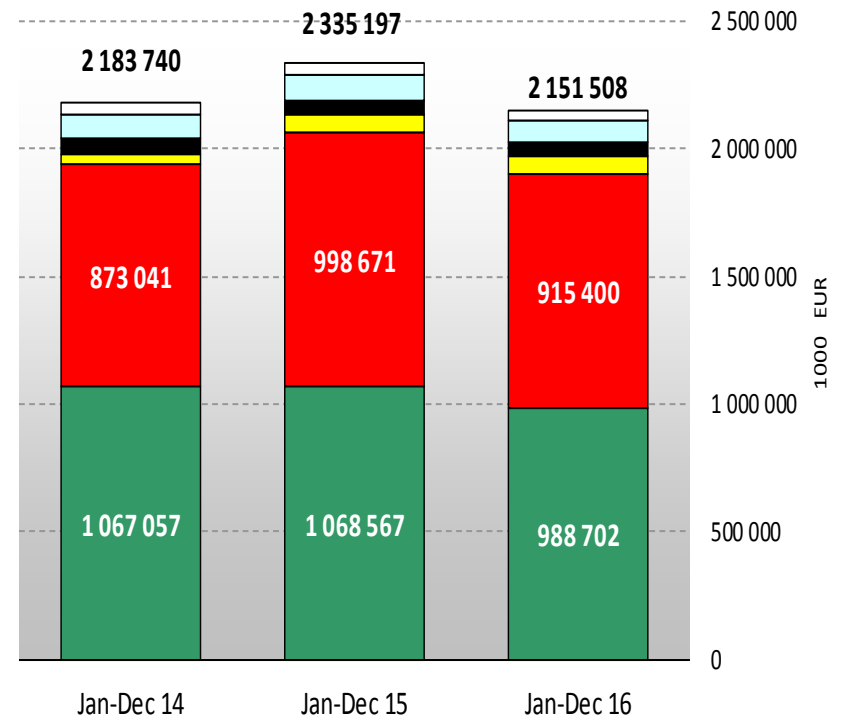
	2012		2013		2014		2015		Jan-Dec 16	Compared	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Dec 15
Brazil	570 574	66.7%	506 374	62.7%	507 355	60.0%	498 869	57.2%	502 805	55.9%	+ 0%
Thailand	197 962	23.2%	228 238	28.3%	251 185	29.7%	274 507	31.5%	289 461	32.2%	+ 6%
Ukraine			276	0.0%	19 958	2.4%	42 412	4.9%	48 039	5.3%	+ 13%
Chile	42 192	4.9%	30 515	3.8%	25 815	3.1%	22 232	2.5%	28 875	3.2%	+ 30%
China	15 698	1.8%	18 145	2.2%	19 761	2.3%	18 396	2.1%	16 929	1.9%	- 8%
Argentina	13 766	1.6%	10 783	1.3%	10 996	1.3%	8 529	1.0%	6 463	0.7%	- 24%
Switzerland	3 812	0.4%	3 817	0.5%	4 307	0.5%	2 428	0.3%	2 542	0.3%	+ 5%
Israel	6 075	0.7%	6 306	0.8%	2 411	0.3%	1 285	0.1%	1 488	0.2%	+ 16%
Others	4 969	0.6%	2 820	0.3%	3 956	0.5%	3 697	0.4%	2 583	0.3%	
Extra-EU	855 048		807 274		845 743		872 356		899 183		
% change			- 5.6%		+ 4.8%		+ 3.1%		+ 2.8%		

EU Poultry meat Imports

EU IMPORTS of Poultry Meat (TONNES cwe)



EU IMPORTS of Poultry Meat (1000 EUR)

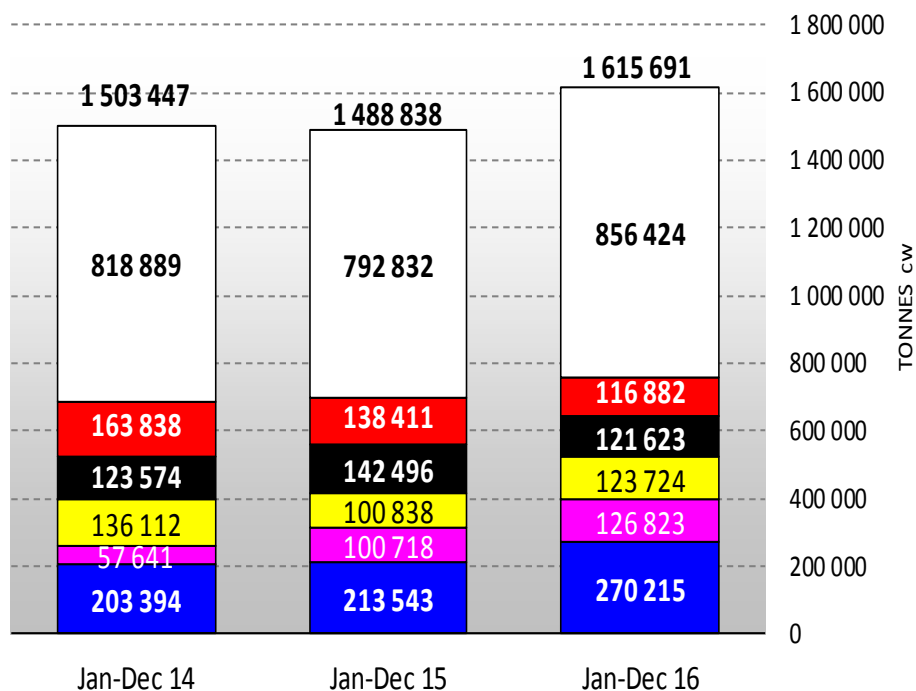


Exports of Poultry Meat to Selected Destinations

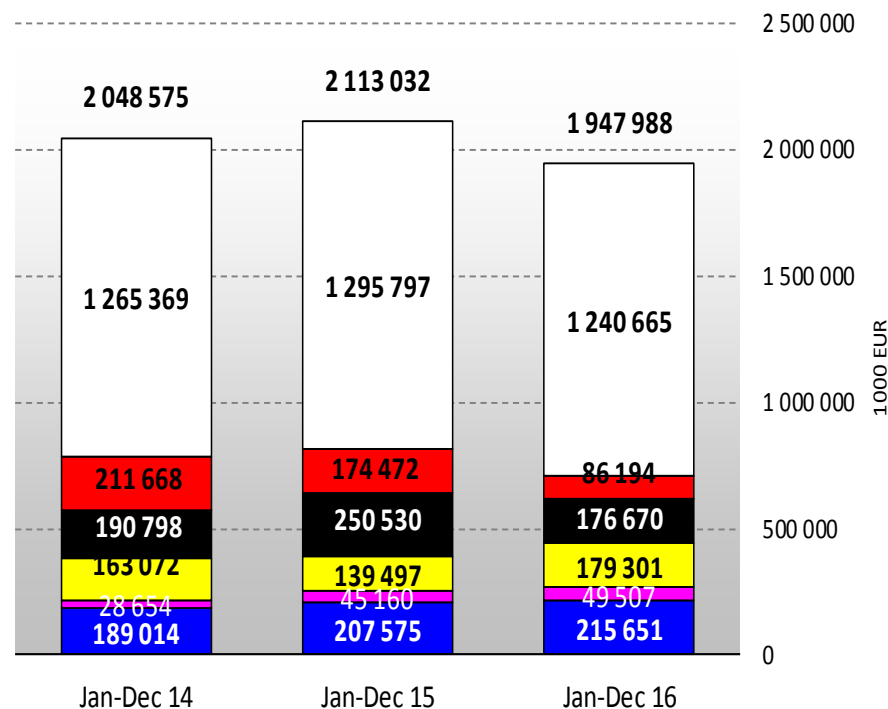
	2012		2013		2014		2015		Jan-Dec 16		Compared to Jan-Dec 15
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
South Africa	131 832	9.2%	158 548	11.1%	203 412	13.5%	213 413	14.3%	270 215	16.7%	+ 27%
Philippines	30 764	2.1%	35 696	2.5%	57 641	3.8%	101 245	6.8%	126 823	7.8%	+ 26%
Hong Kong	125 831	8.8%	116 963	8.2%	136 177	9.1%	101 090	6.8%	123 724	7.7%	+ 23%
Saudi Arabia	149 310	10.4%	154 787	10.8%	123 574	8.2%	142 496	9.6%	121 623	7.5%	- 15%
Benin	139 817	9.8%	139 247	9.7%	163 844	10.9%	136 601	9.2%	116 882	7.2%	- 16%
Ukraine	103 427	7.2%	75 965	5.3%	80 084	5.3%	90 886	6.1%	114 941	7.1%	+ 27%
Ghana	69 156	4.8%	75 252	5.3%	56 900	3.8%	68 799	4.6%	77 158	4.8%	+ 13%
Congo (Dem. Rep.)	34 231	2.4%	28 625	2.0%	33 697	2.2%	36 061	2.4%	44 465	2.8%	+ 26%
Vietnam	19 078	1.3%	13 564	0.9%	19 884	1.3%	27 219	1.8%	36 115	2.2%	+ 33%
Gabon	26 298	1.8%	25 070	1.8%	29 409	2.0%	37 330	2.5%	31 925	2.0%	- 14%
Russia	113 134	7.9%	95 200	6.7%	68 363	4.5%	1 235	0.1%	1 109	0.1%	- 9%
Other Destinations	488 248	34.1%	509 539	35.7%	530 998	35.3%	534 631	35.9%	550 710	34.1%	
Extra-EU	1 431 125		1 428 457		1 503 984		1 491 007		1 615 691		
% change			- 0.2%		+ 5.3%		- 0.9%		+ 8.5%		

EU Poultry meat Export

EU EXPORTS of Poultry Meat (TONNES cwe)

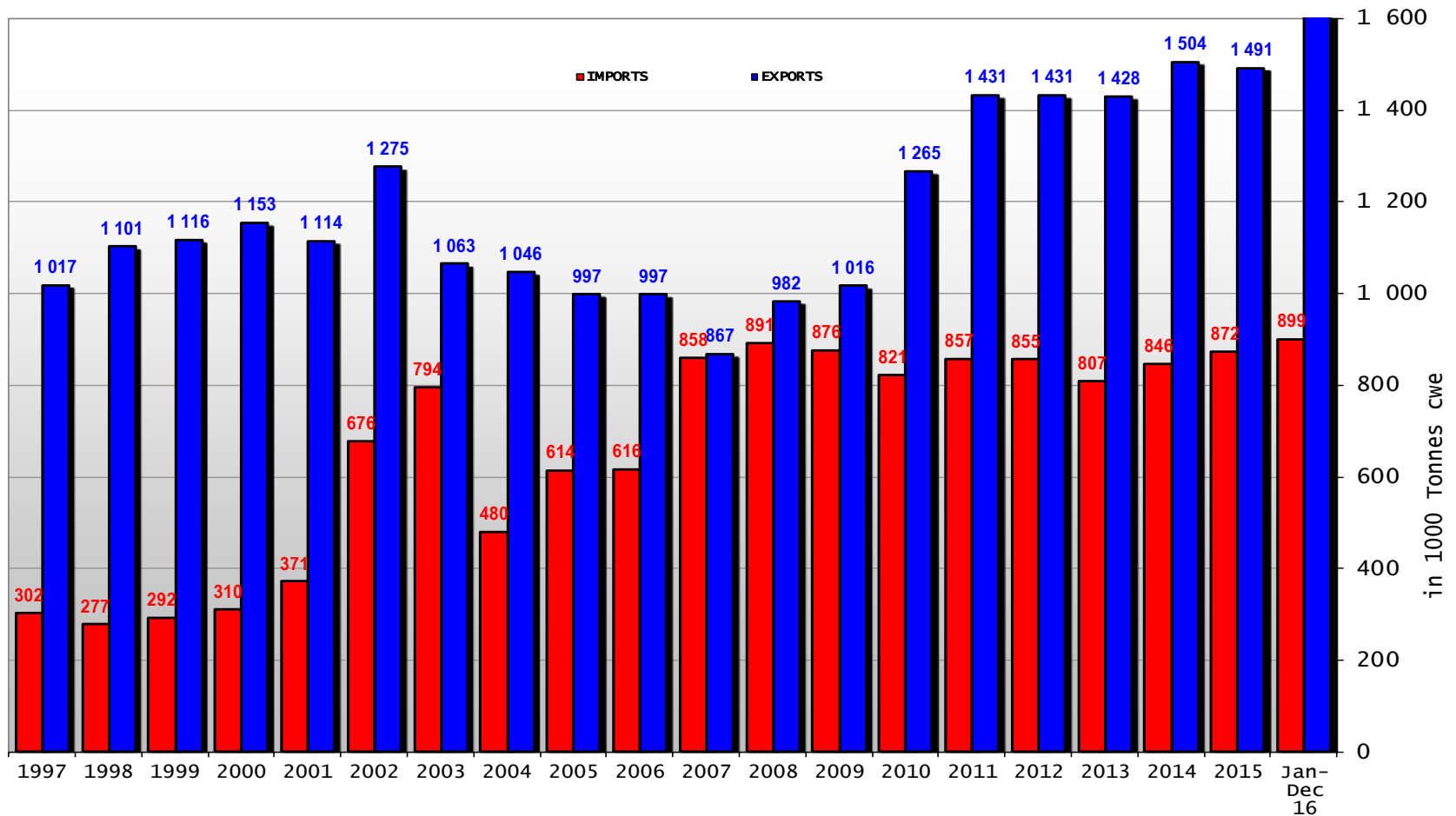


EU EXPORTS of Poultry Meat (1000 EUR)

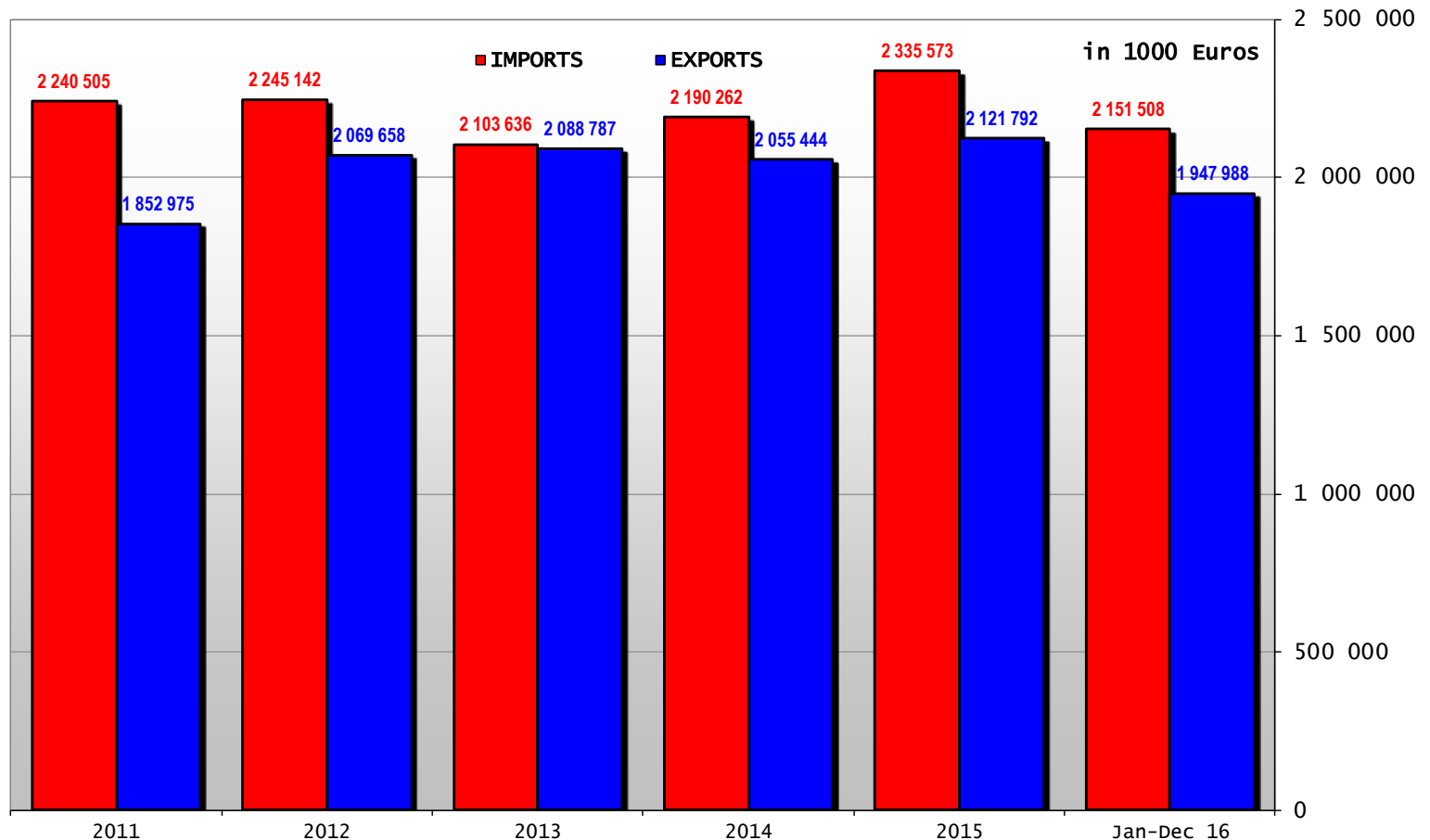


* countries trading less than 1 948 000 ('000 EUR)

EU Poultry meat Trade Balance



EU Poultry meat trade balance (in 1000 euros)





EU Poultry meat imports from Ukraine

3 import regimes

1. TRQs for Ukraine

- **COMMISSION IMPLEMENTING REGULATION (EU) 2015/2078** of 18 November 2015 opening and providing for the administration of Union import tariff quotas for poultrymeat originating in Ukraine
 - 16 000 tonnes: poultry meat selection of cuts and carcasses
 - 20 000 tonnes: chicken frozen carcasses

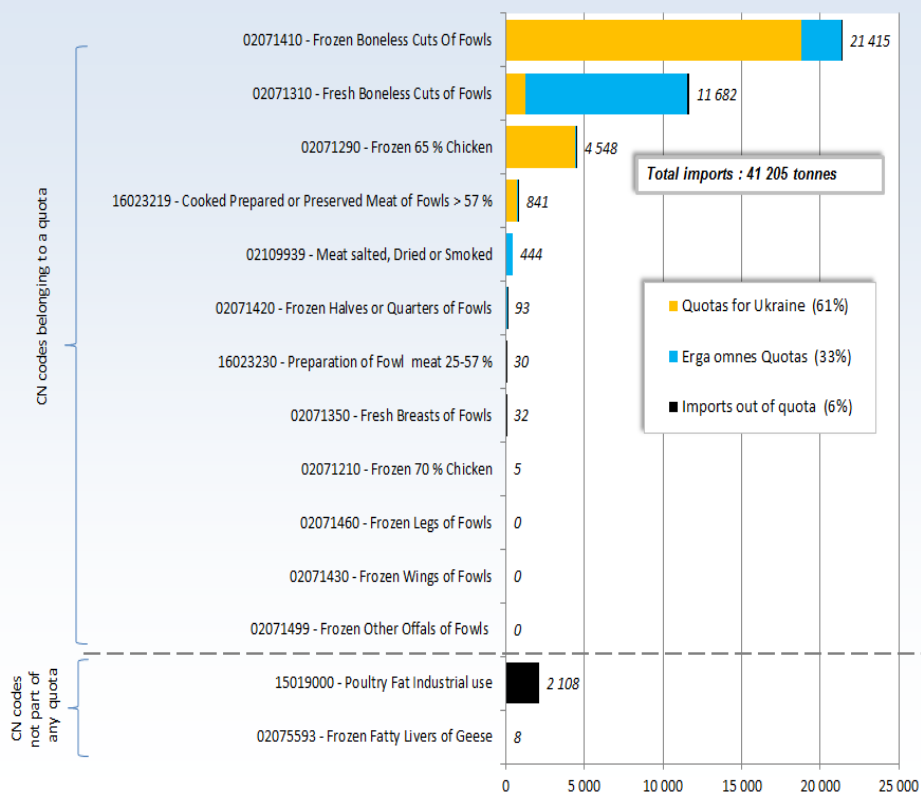
2. Erga omnes TRQs

- **COMMISSION REGULATION (EC) No 533/2007** of 14 May 2007 opening and providing for the administration of tariff quotas in the poultrymeat sector
- **COMMISSION REGULATION (EC) No 616/2007** of 4 June 2007 opening and providing for the administration of Community tariff quotas in the sector of poultrymeat originating in Brazil, Thailand and other third countries
- **COMMISSION REGULATION (EC) No 1385/2007** of 26 November 2007 laying down detailed rules for the application of Council Regulation (EC) No 774/94 as regards opening and providing for the administration of certain Community tariff quotas for poultrymeat

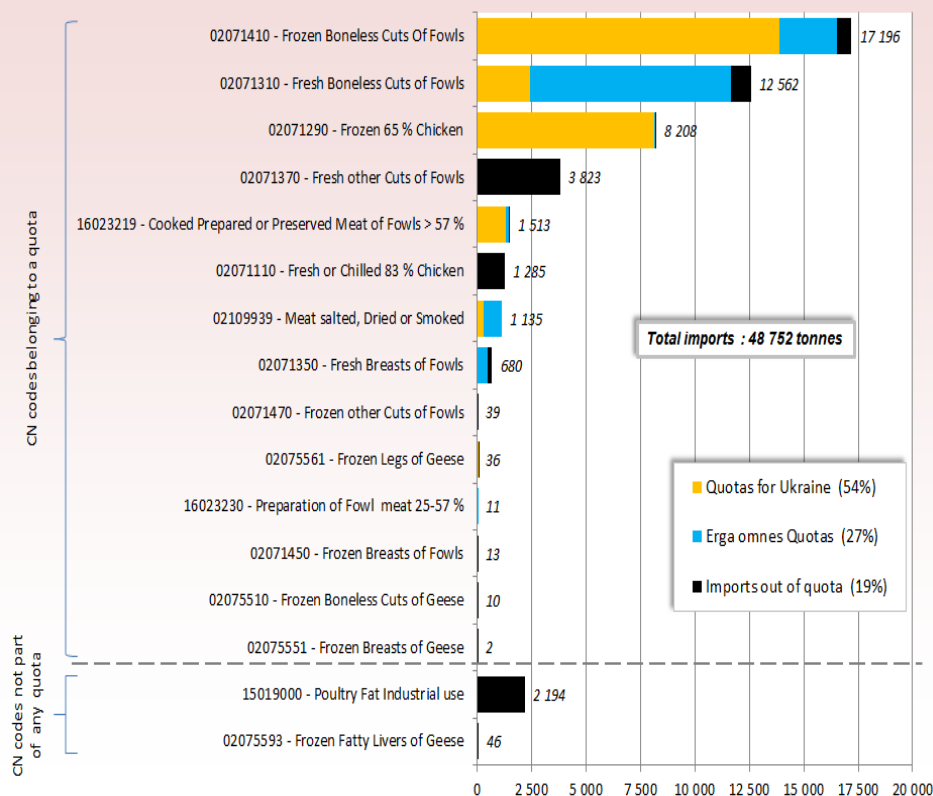
3. Imports under MFN full duty

EU Poultry meat imports from Ukraine (in tonnes cwe)

EU Imports of Poultry meat from from UKRAINE in 2015
(in tonnes CWE)

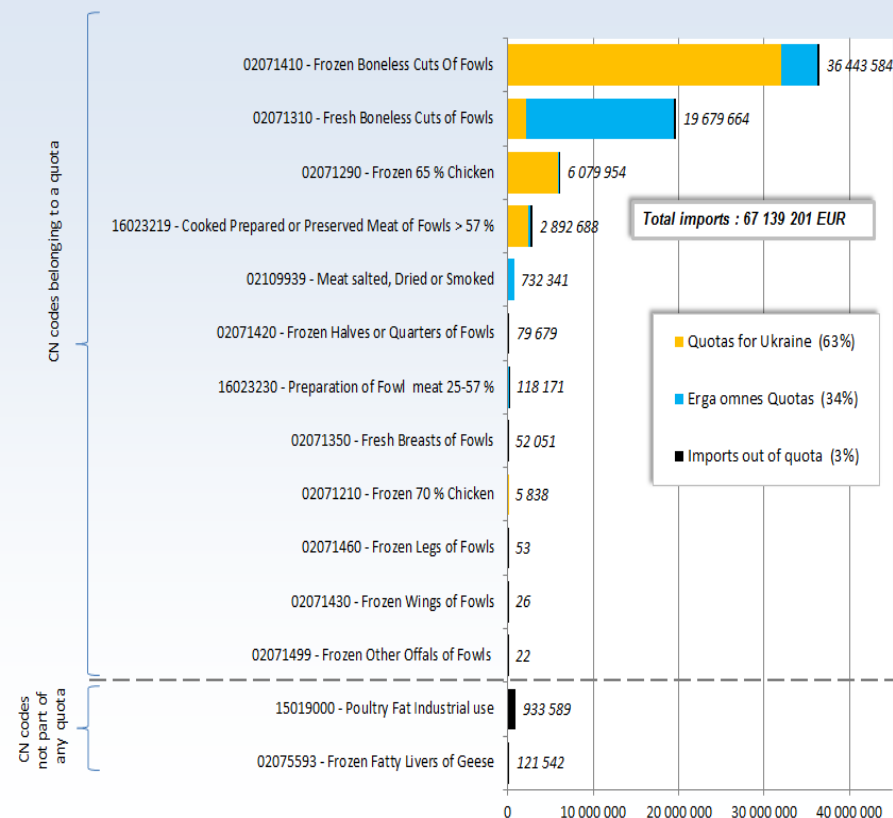


EU Imports of Poultry meat from UKRAINE in 2016 (Jan to Dec)
(in tonnes CWE)

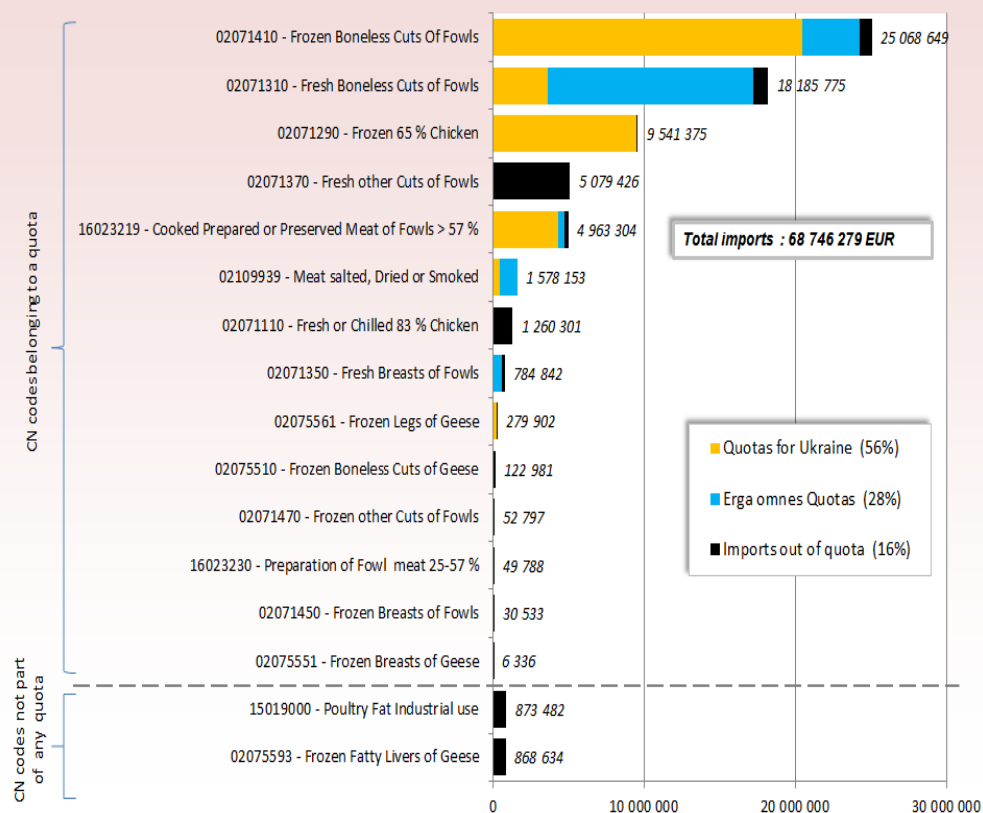


EU Poultry meat imports from Ukraine (in EURO)

EU Imports of Poultry meat from from UKRAINE in 2015
(in EUR)



EU Imports of Poultry meat from UKRAINE in 2016 (Jan to Dec)
(in EUR)



- Since 4 November 2016, when Hungary reported the first outbreak of HPAI H5N8 in poultry, the **outbreaks in poultry holdings have spread to 16 EU Member States.**
- As of 9 February 2016, the **most affected Member States** in terms of number of outbreaks are **Hungary** (231), **France** (226), **Bulgaria** (63) and **Poland** (44). Other affected Member States Germany (52), Austria (2), Denmark (1), Sweden (3), Netherlands (9), the United Kingdom (8), Slovakia (6), Romania (8), Croatia (2), Czech Republic (25), Greece (3) and Italy (4). *Number of outbreaks in respective Member States is under development.*
- Mostly affected are holdings with ducks and geese but also turkey, chicken breeding and laying hens holdings. Wild birds are at the origin of the virus.
- Affected Member States immediately took **EU control measures (Council Directive 2005/94/EC) to prevent virus spread to other holdings and established protection and surveillance zones** around the infected holdings.
- The disease situation and the measures adopted by the Commission are regularly reviewed during the periodical meetings of EU Member State experts at the **Standing Committee on Plants, Animals, Food and Feed**.
- Information on latest developments: http://ec.europa.eu/food/animals/animal-diseases/control-measures/avian-influenza_en

- Number third-country trading partners raised **temporary restrictions on imports of hatching eggs, day old chicks, poultry and poultry products from Member States affected by those outbreaks.**
- Trade partners generally follow EU regionalisation, some imposed **country-wide bans for some of the biggest EU poultry exporters** (DG TRADE 25/1/2017):
 - **NL** (by Bangladesh, China, Ethiopia, India, Israel, Korea, Malaysia, Nepal, South Africa, Sudan, Thailand), **UK** (by China, Singapore), **PL** (by China, Israel), **AT** (by Ukraine), **DE** (by Israel, Japan, Korea, Singapore, South Africa), **DK** (by Japan, Korea, Singapore, South Africa, Ukraine), **FR** (by South Africa), **HU** (by Israel, Japan, Korea, South Africa), **IT** (by Nigeria), **SE** (Korea, Turkey).

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