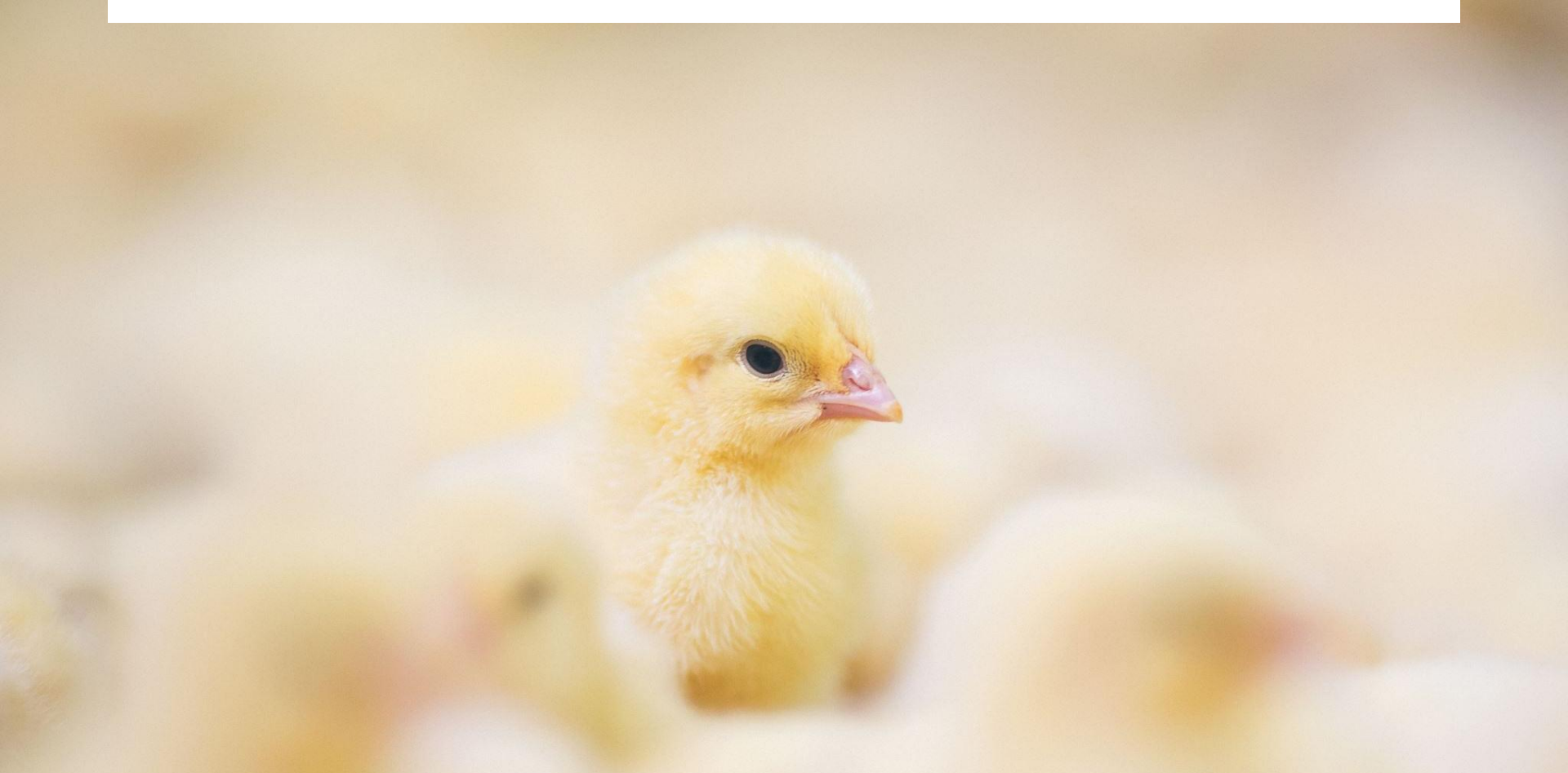


Market Situation for Poultry

CMO GREX on Animal Products - *18 September 2025*



FORECAST

EU production of poultry

Qty in Tonnes

Source : Eurostat & Forecast 2025 by MS

% change

	2023	2024	%2024/2023	trend 2025/2024
PL	2,729,890	2,746,040	0.6	↗
ES	1,638,640	1,718,430	4.9	↑
FR	1,503,580	1,533,410	2.0	↑
DE	1,543,000	1,563,000	1.3	↗
IT	1,213,160	1,334,140	10.0	↗
NL	849,620	849,630	0.0	↘
RO	491,220	510,690	4.0	↑
BE	449,040	428,200	-4.6	↑
EL	248,770	273,890	10.1	↗
IE	170,940	167,650	-1.9	↑
SE	176,120	175,860	-0.1	↑
CZ	169,970	167,690	-1.3	↑
AT	143,580	150,470	4.8	↑
DK	151,920	159,200	4.8	↘
FI	147,130	143,580	-2.4	↑
BG	119,530	120,890	1.1	↗
LT	86,280	85,950	-0.4	↗
HR	71,620	72,090	0.7	↑
SK	77,370	77,360	-0.0	↗
SI	73,660	75,250	2.2	↗
LV	36,600	37,080	1.3	↗
CY	27,260	27,770	1.9	↗
EE				
HU	479,880	514,810	7.3	
PT	370,980	380,740	2.6	
MT	4,250	4,740	11.5	
EU27	12,974,010	13,318,560	2.7	↑

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

FORECAST

EU production of broiler

Qty in Tonnes

Source : Eurostat & Forecast 2025 by MS

% change

	2023	2024	%2024/2023	trend 2025/2024
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	↑
DE	1,076,000	1,083,000	0.7	↑
IT	993,950	1,083,180	9.0	↓
NL	863,970	849,620	-1.7	↓
BE	442,020	421,480	-4.6	↑
RO	475,450	500,760	5.3	↑
EL	244,850	271,690	11.0	↗
SE	167,170	166,880	-0.2	↑
CZ	161,020	159,100	-1.2	↗
IE	144,730	137,010	-5.3	↑
DK	151,730	159,030	4.8	↓
FI	138,280	134,770	-2.5	↑
BG	90,580	90,540	-0.0	↑
LT	84,240	83,040	-1.4	↗
SK				
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	↗
EE				
AT				
HU	348,840	378,980	8.6	
PT	314,170	322,970	2.8	
MT	4,250	4,740	11.5	
EU27	10,588,350	10,856,500	2.5	↑

EU production of turkey

Qty in Tonnes

Source : Eurostat & Forecast 2025 by MS

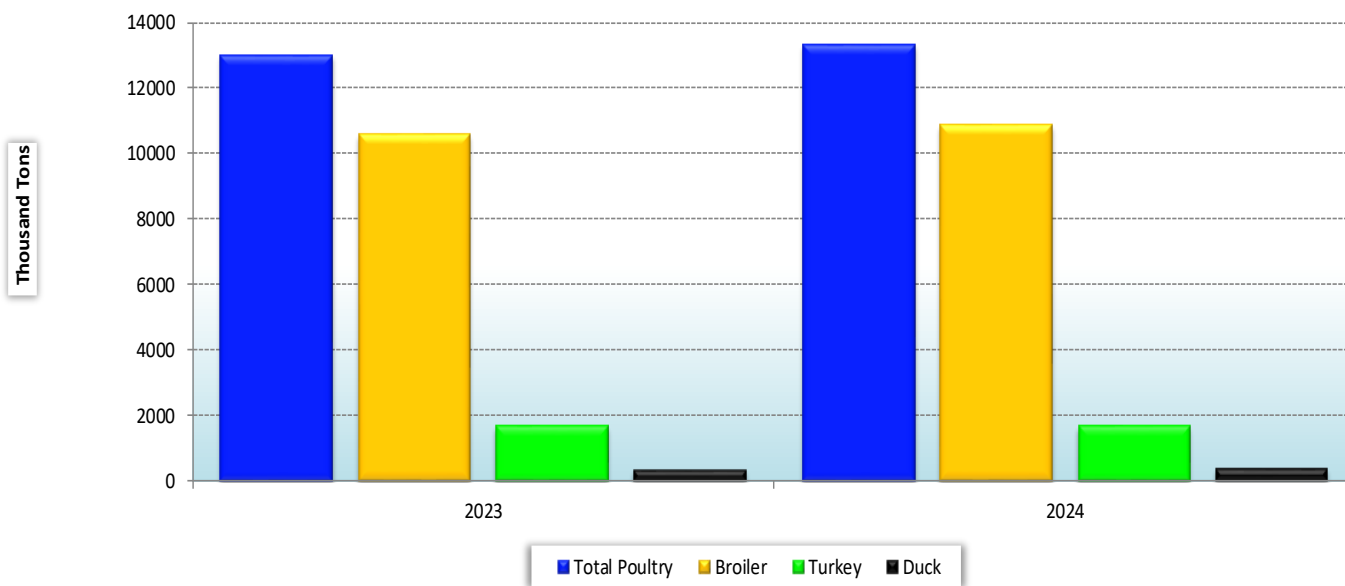
% change

	2023	2024	%2024/2023	trend 2025/2024
PL	409,170	367,310	-10.2	↓
DE	406,000	422,000	3.9	↓
PL	409,170	367,310	-10.2	↓
IT	211,130	242,750	15.0	↑
FR	244,920	240,230	-1.9	↓
ES	231,590	248,030	7.1	↓
IE	14,720	16,400	11.4	↑
CZ	1,740	1,720	-1.1	↑
HR				
FI	8,840	8,810	-0.3	↓
BE		6,570		↑
SI	5,220	5,590	7.1	↓
SE	4,690	4,680	-0.2	↓
SK				
EL	2,880	2,140	-25.7	↓
AT				
HU	63,910	56,210	-12.0	
PT	45,650	44,590	-2.3	
EU27	1,650,660	1,667,160	1.0	↓

FORECAST

EU27 production forecast on Poultry*

Missing or incomplete data for HU MT PT

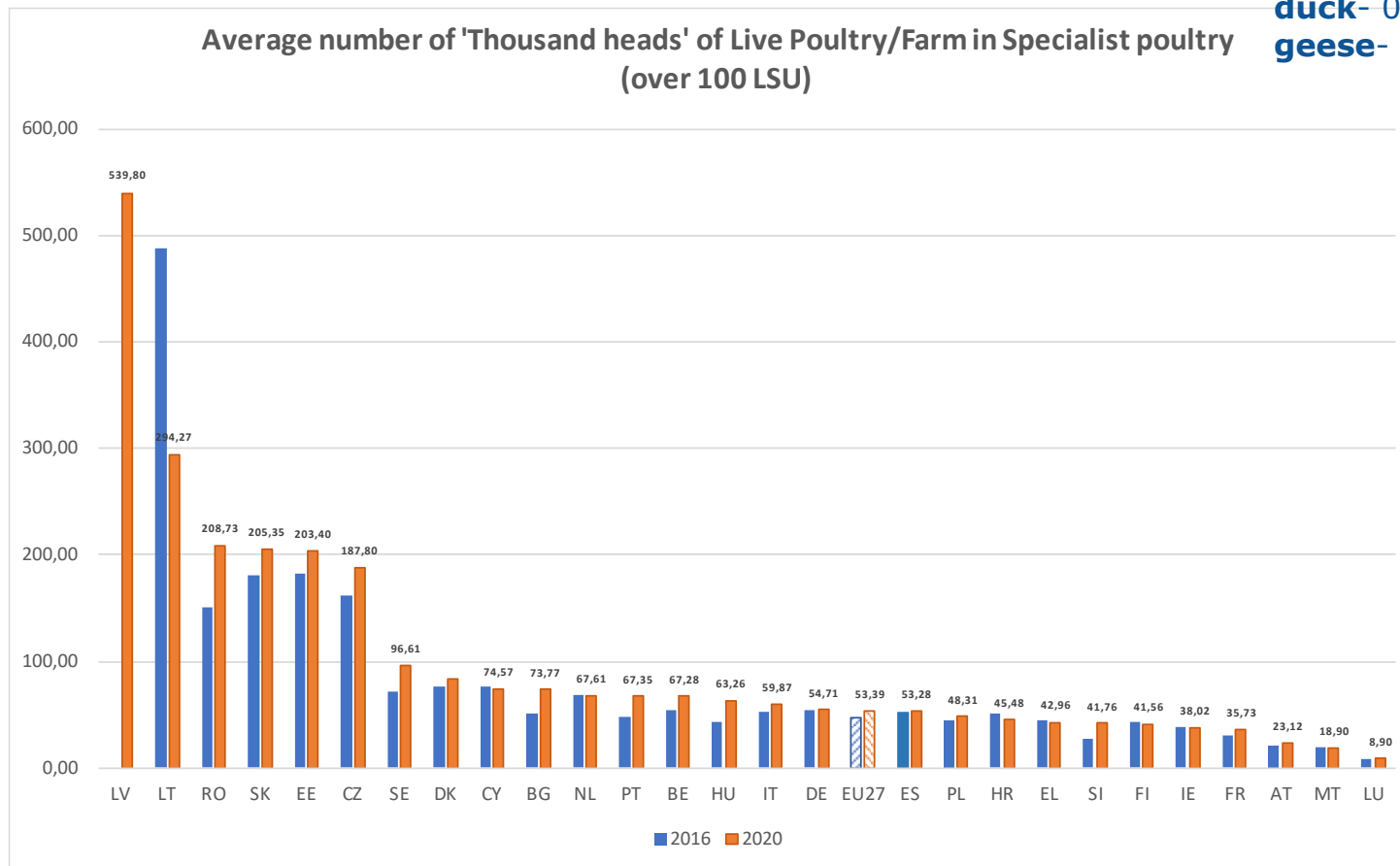


	2023	2024	% 2024/ 2023	% 2025/ 2024
Total Poultry	12,974	13,319	+ 2.7%	↑
Broiler	10,588	10,857	+ 2.5%	↑
Turkey	1,651	1,667	+ 1.0%	↓
Duck	314	351	+ 11.8%	↑

* Source: Eurostat, forecast 2025 by MS

FARM STRUCTURE SURVEY

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

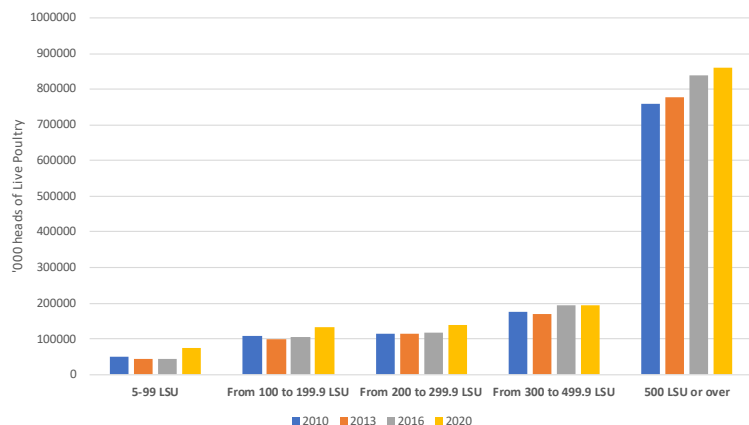


Specialist poultry - EU

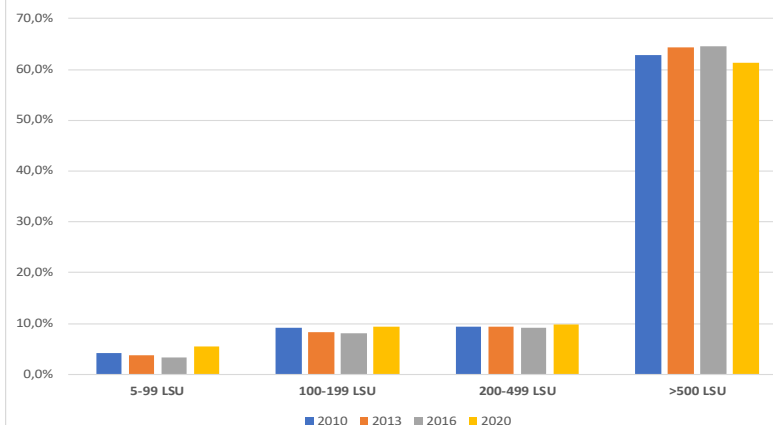
- 24.770 specialised holdings **with over 100 LSU** in 2020 (-7% compared to 2016)
- 14.167.720 LSU in 2020 (-11% compared to 2016)

FARM STRUCTURE SURVEY

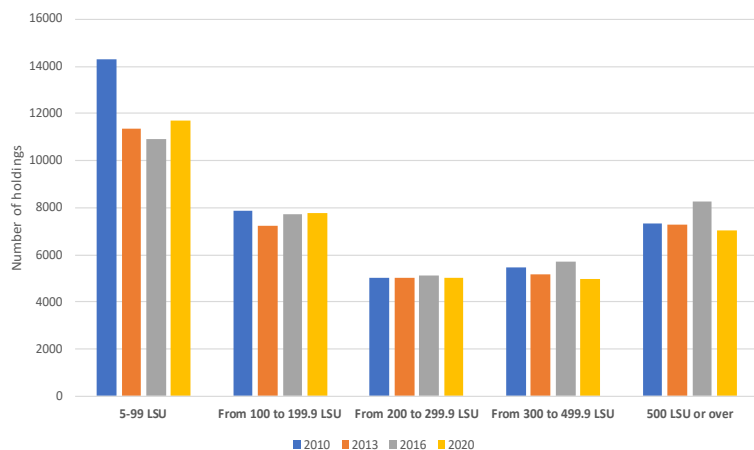
Thousand heads of Live poultry by LSU class in Specialist poultry (over 5 LSU)



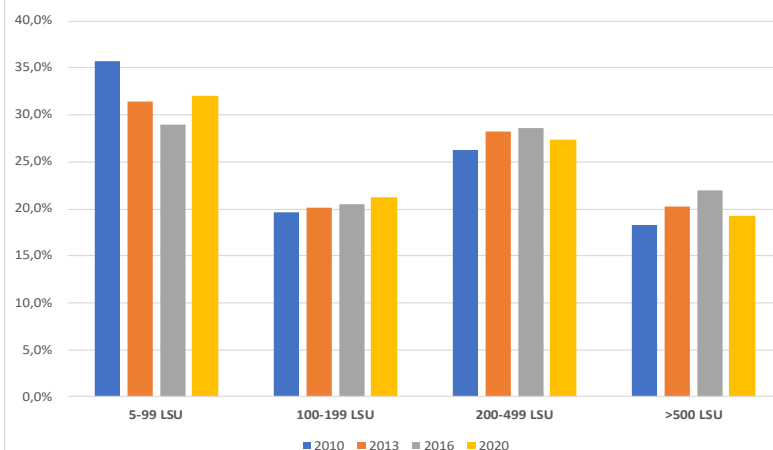
Share of animals by LSU class (over 5 LSU)



Number of holdings by LSU class in Specialist poultry (over 5 LSU)

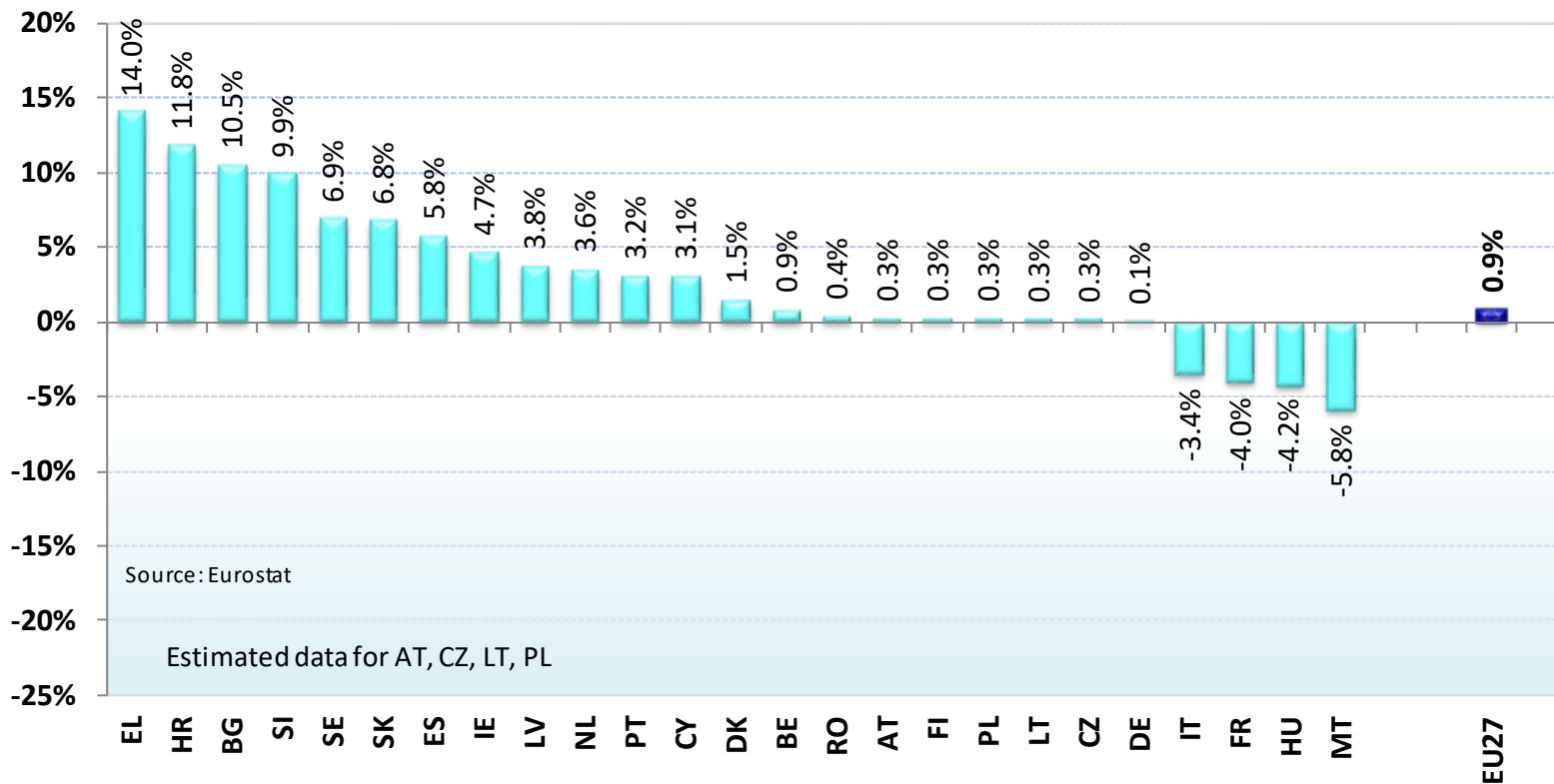


Share of holdings by LSU class (over 5 LSU)

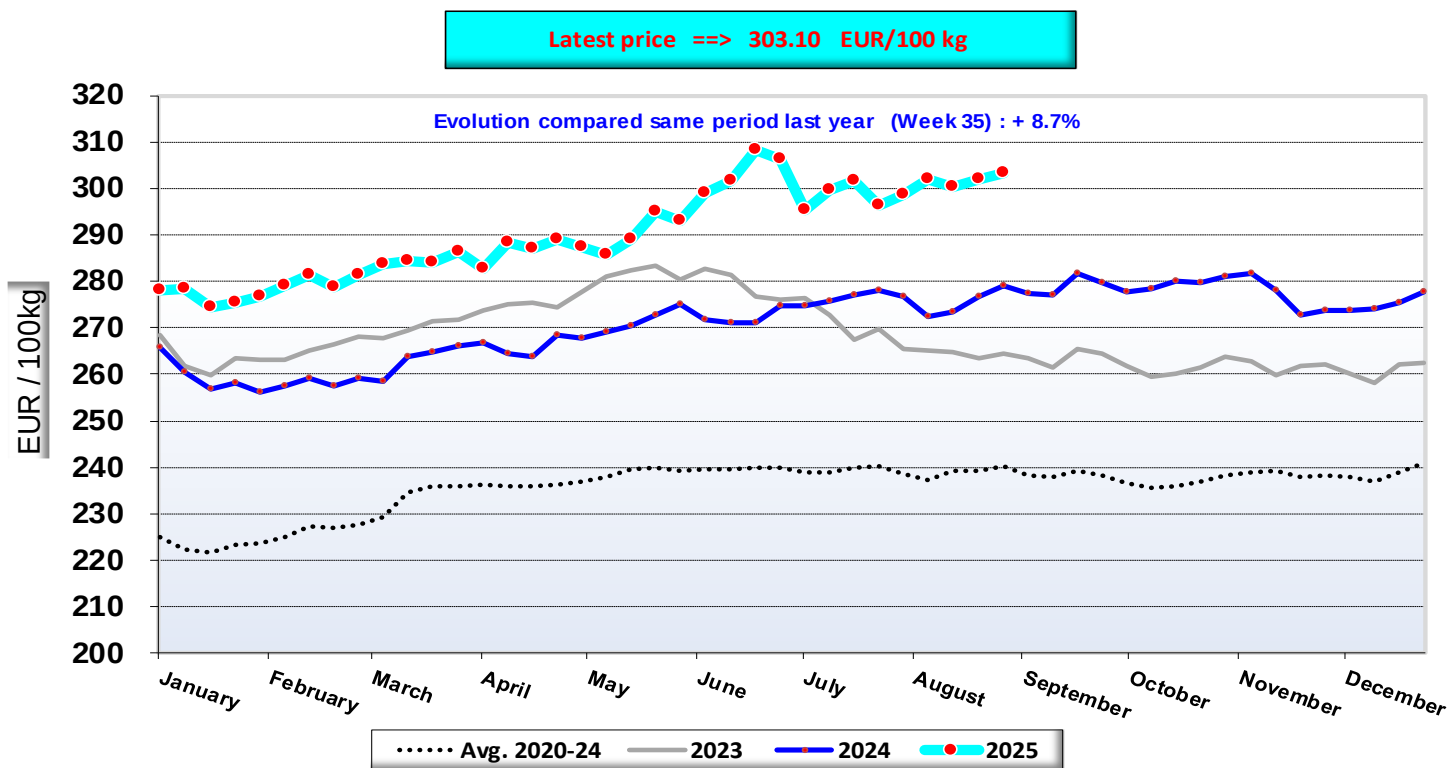


PRODUCTION

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



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

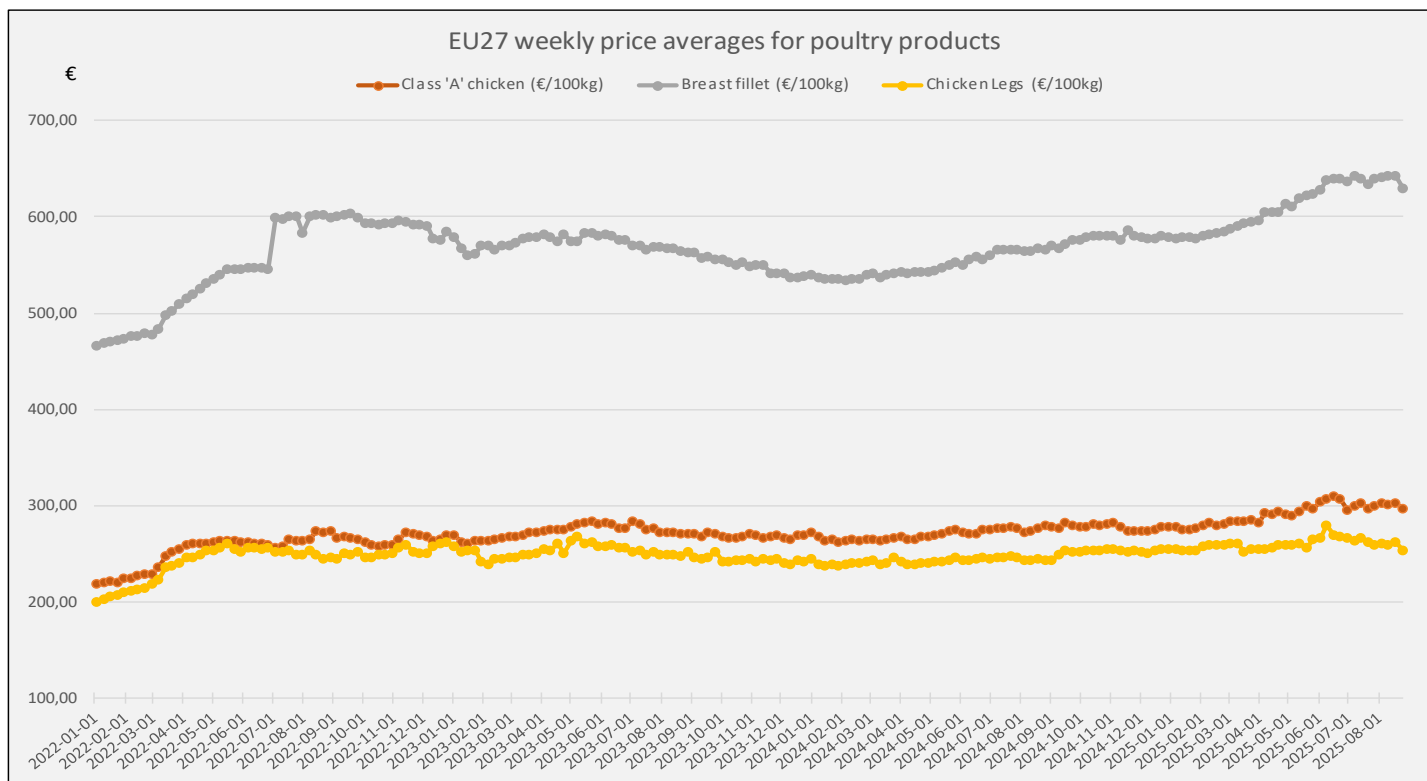


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

Weekly prices of poultry products

Week - 35

EU27 weekly price averages for poultry products



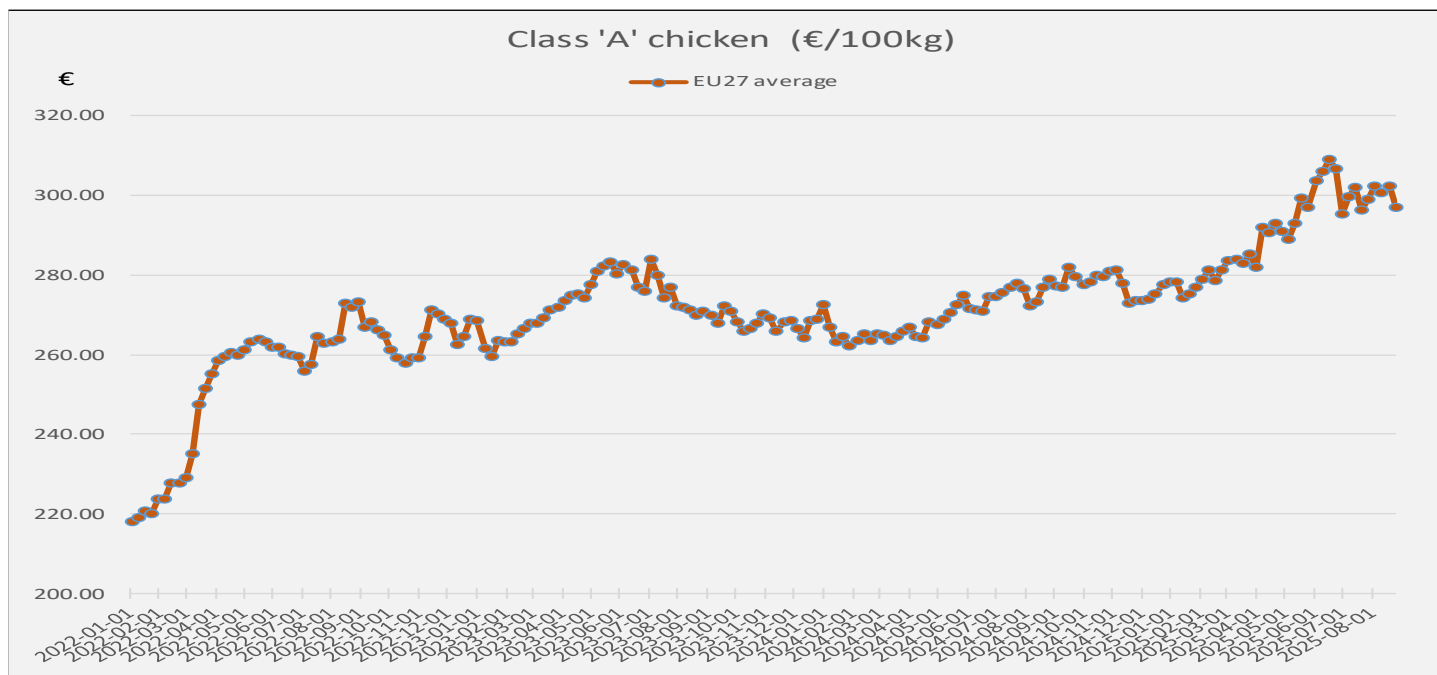
Week - 35	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	296,93	629,87	252,96

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 - 35 Class 'A' chicken

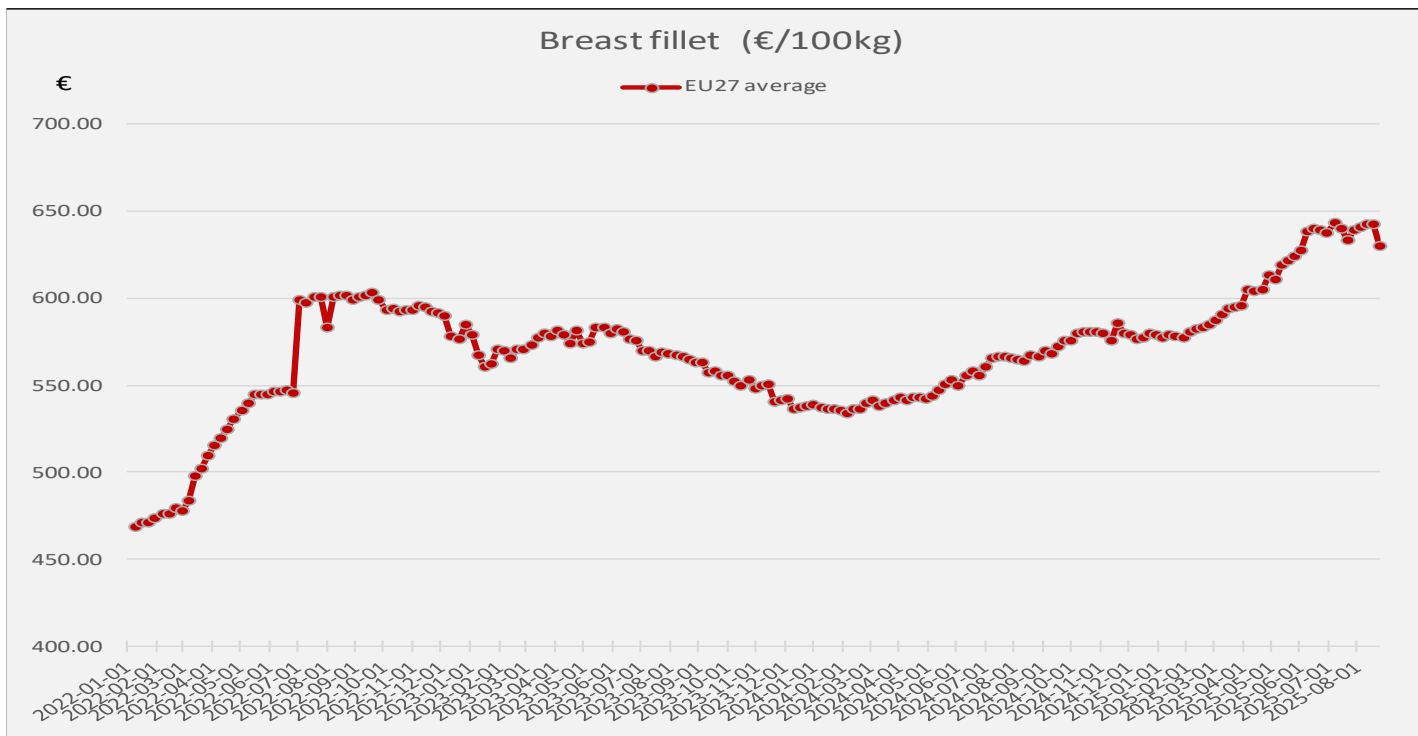


Week - 35	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	296.93	- 1.8%	- 0.7%	+ 6.5%

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

Weekly price of 'Breast fillet'

Week - 35 Breast fillet

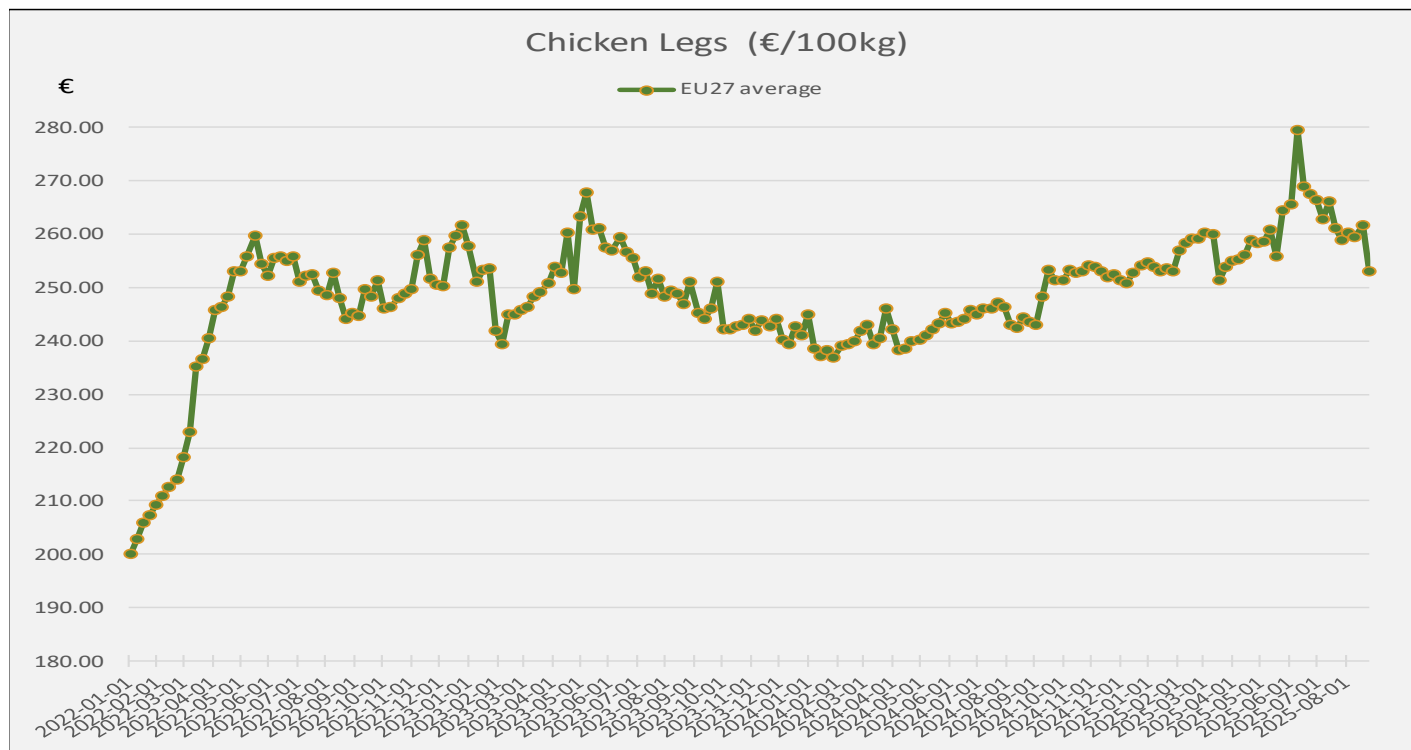


Week - 35	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	629.87	- 2.0%	- 1.5%	+ 11.2%

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'

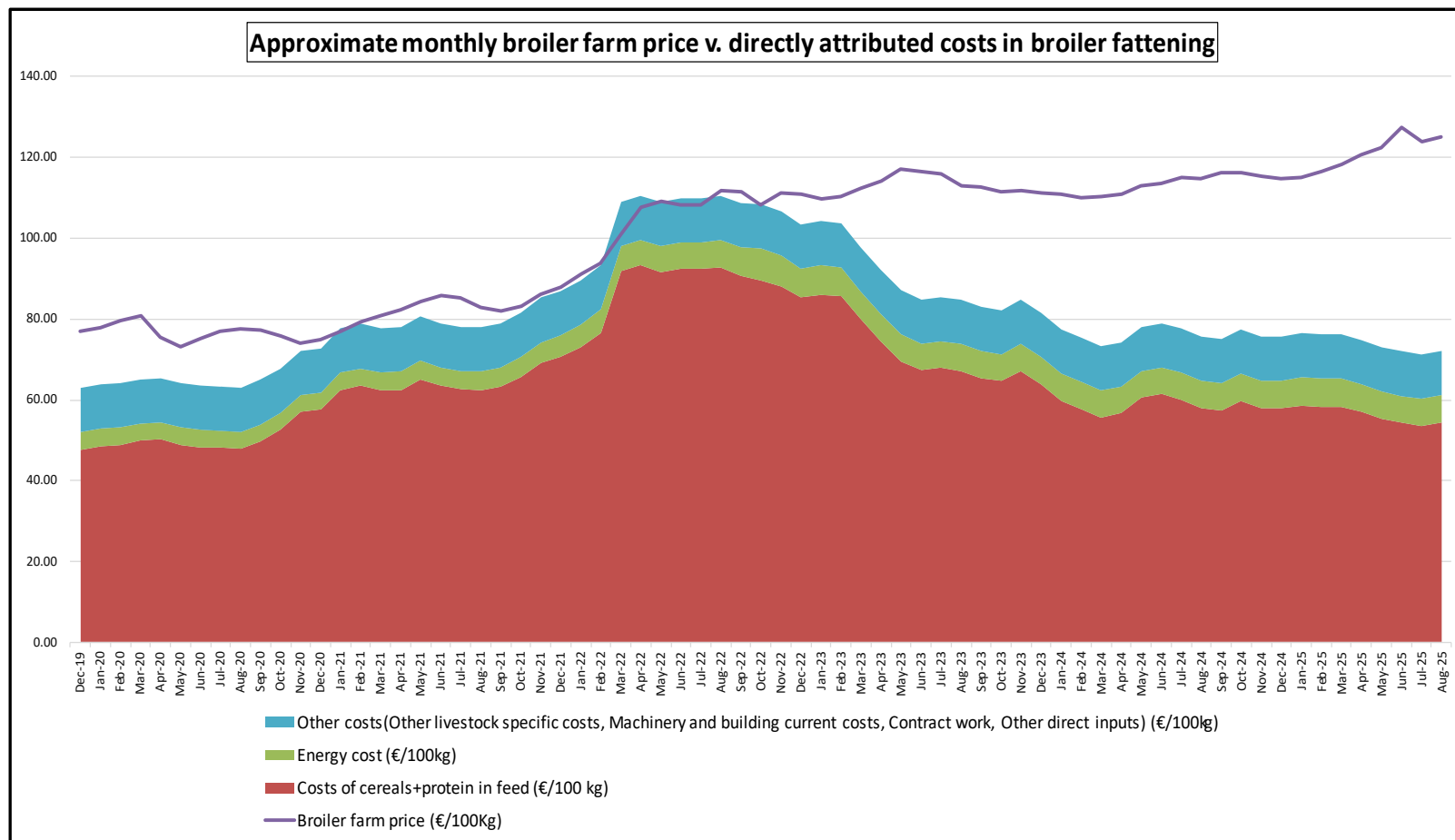
Week - 35 Chicken Legs



Week - 35	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	252.96	- 3.3%	- 2.3%	+ 3.9%

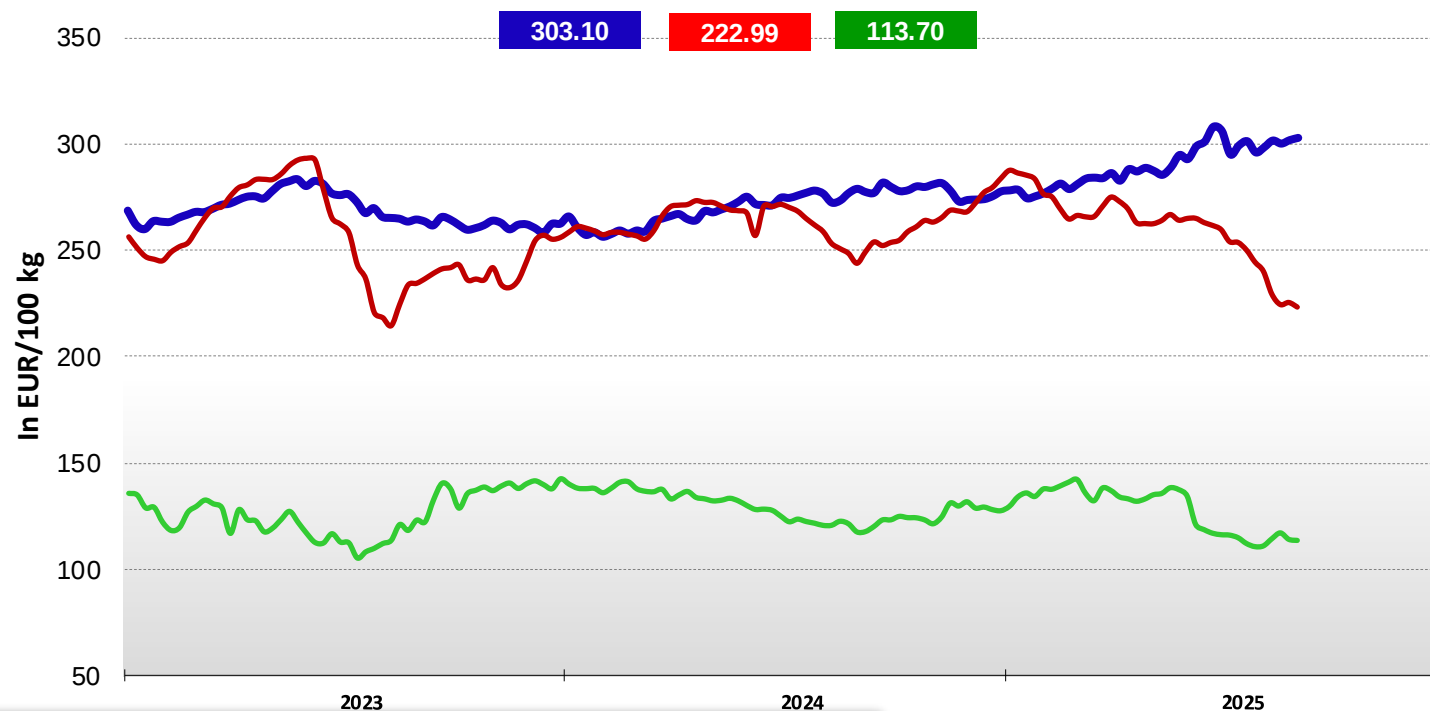
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !

COST BROILER PRODUCTION



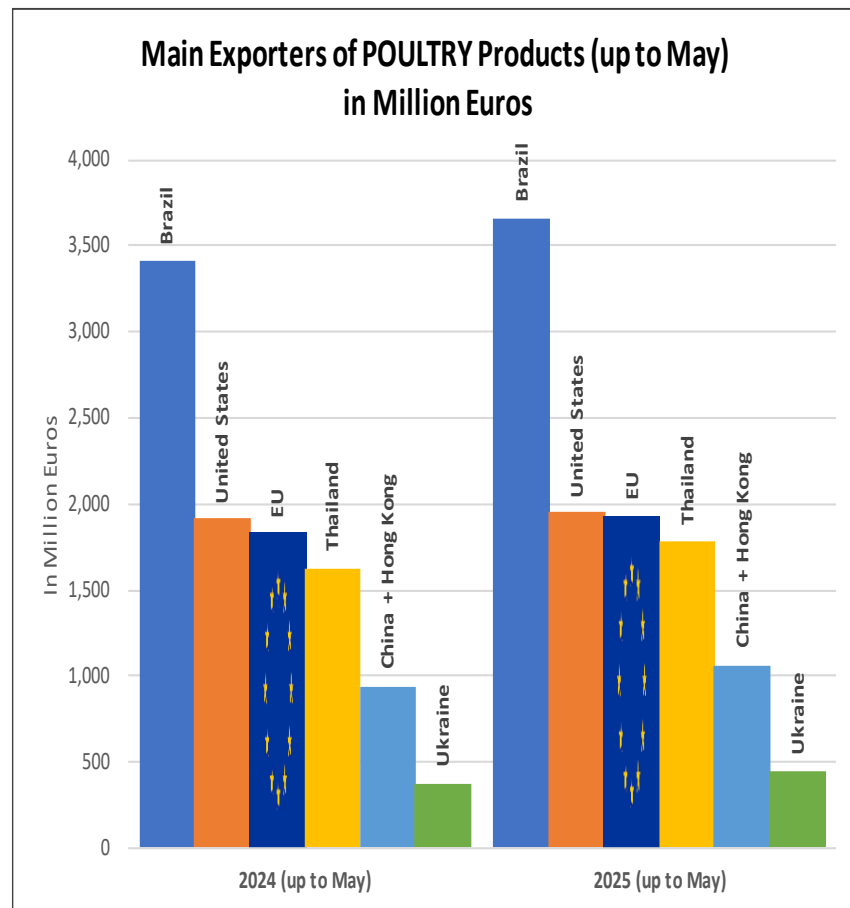
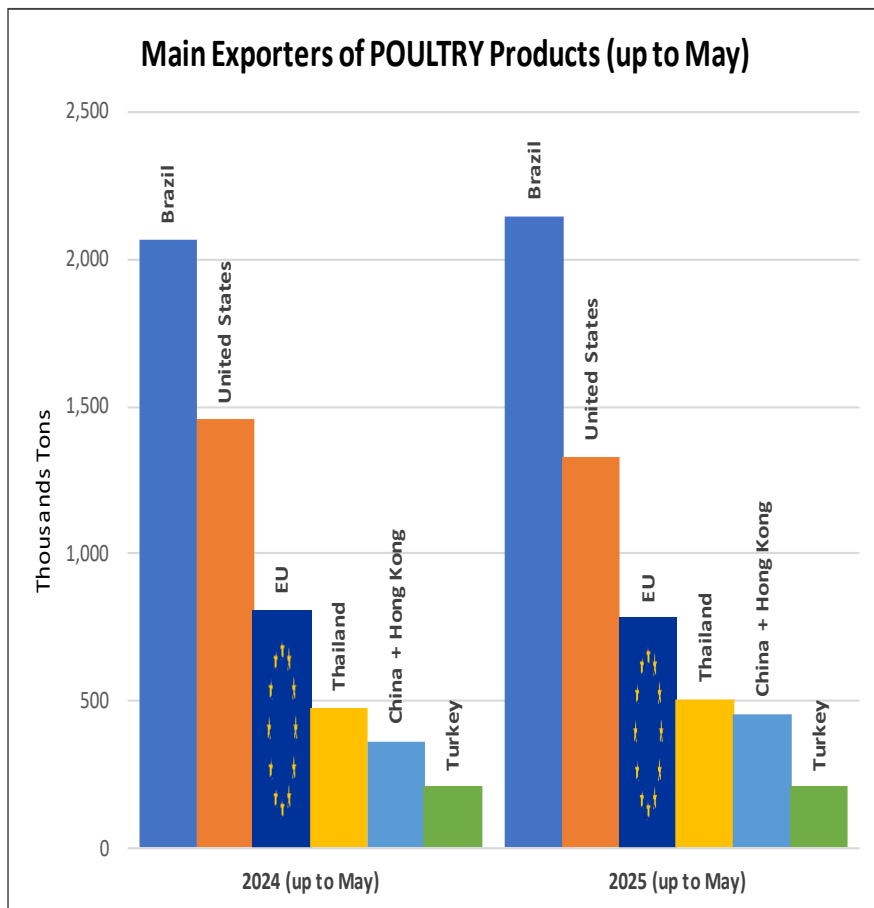
Please note that broiler farm prices are not directly available. Their estimation was obtained using a fixed rate of feed costs taken from FADN2019 and the % change of the monthly wholesale price of 'Class A chicken'.

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

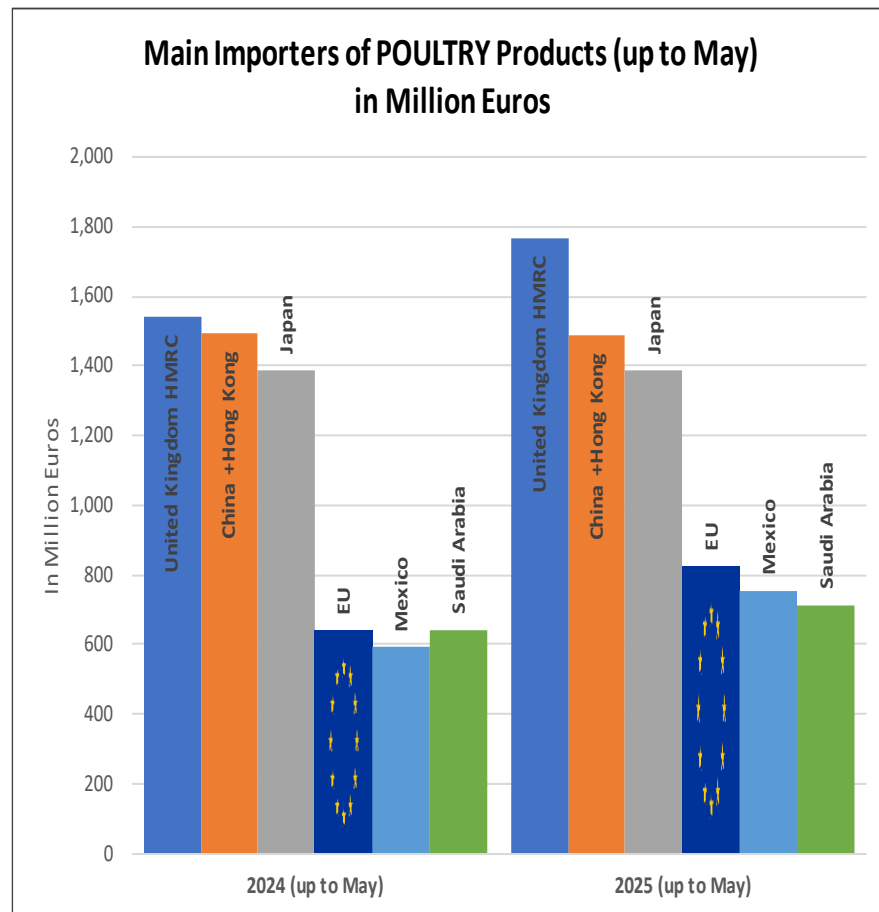
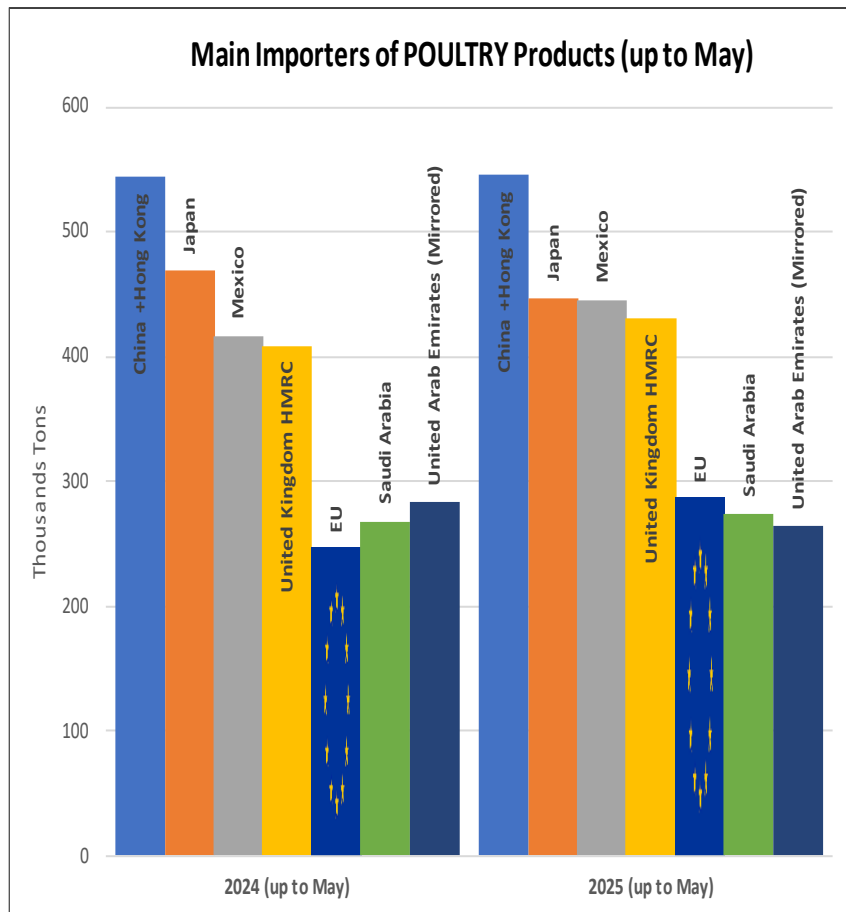
— EU — US — BR



Source: Trade Data Monitor

WORLD MARKET

MAIN IMPORTERS



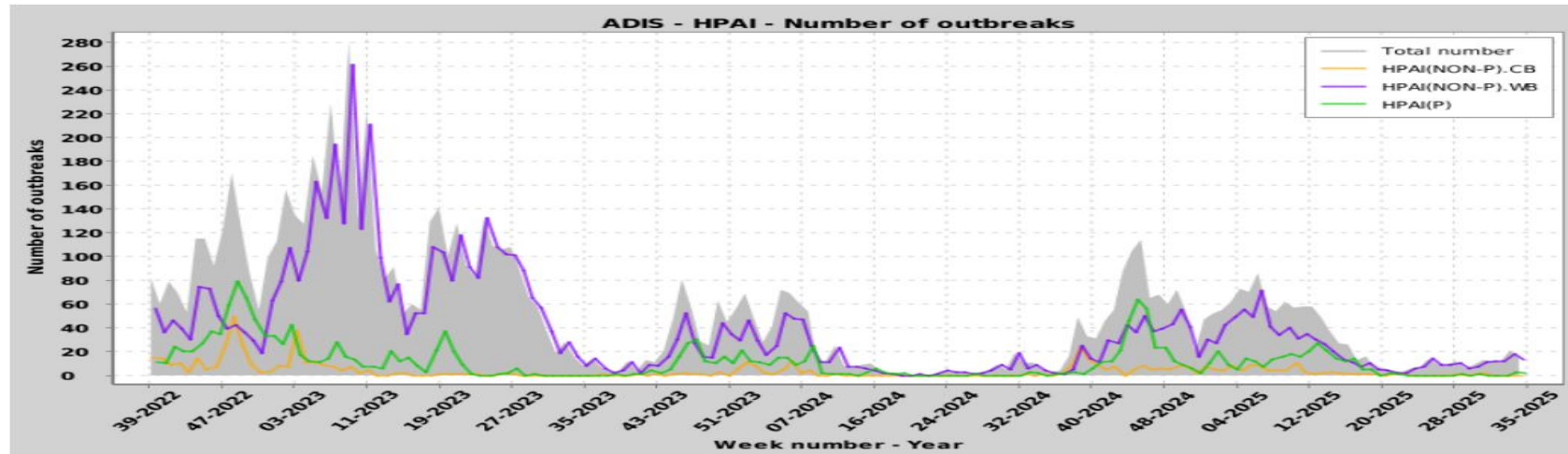
Source: Trade Data Monitor

Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2024 – 08/09/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
PL	109	10,692,247	20.6%	49.2%
IT	56	4,255,764	10.6%	19.6%
HU	283	4,011,249	53.6%	18.5%
BG	13	586,107	2.5%	2.7%
SK	2	425,260	0.4%	2.0%
PT	3	313,423	0.6%	1.4%
DE	23	297,108	4.4%	1.4%
LT	1	246,387	0.2%	1.1%
BE	3	244,136	0.6%	1.1%
NL	5	173,647	0.9%	0.8%
FR	9	162,372	1.7%	0.7%
AT	6	148,001	1.1%	0.7%
<i>Other MS</i>	21	308,801	2.8%	0.7%
Total	528	21,716,501	100.0%	100.0%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	27	2,667,295	5.1%	12.3%
Laying hen	63	10,930,954	11.9%	50.3%
Duck	206	3,118,601	39.0%	14.4%
Turkey	90	3,003,241	17.0%	13.8%
Goose	76	400,502	14.4%	1.8%
Pheasant	3	6,569	0.6%	0.0%
Mixed	17	93,507	3.2%	0.4%
No information	46	1,495,832	8.7%	6.9%
Total	528	21,716,501	100.0%	100.0%



EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

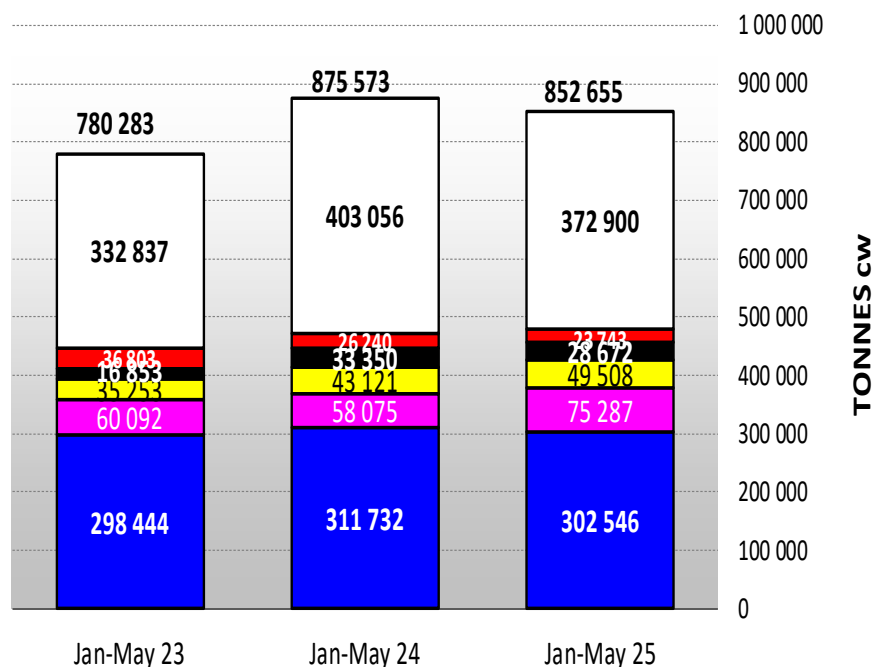
	2021		2022		2023		2024		Jan-May 25		Compared to Jan-May 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	725 611	32%	747 161	37%	721 833	37%	747 733	35%	302 546	35.5%	- 2.9%
Ghana	228 066	10%	156 456	8%	149 223	8%	154 492	7%	75 287	8.8%	+ 29.6%
Congo (Dem. Rep.)	139 852	6%	125 421	6%	101 020	5%	109 801	5%	49 508	5.8%	+ 14.8%
Vietnam	31 784	1%	29 751	1%	54 203	3%	69 023	3%	28 672	3.4%	- 14.0%
Ukraine	162 267	7%	105 810	5%	84 639	4%	58 716	3%	23 743	2.8%	- 9.5%
Saudi Arabia	58 457	3%	74 590	4%	66 759	3%	66 994	3%	23 437	2.7%	- 31.5%
Benin	64 358	3%	63 516	3%	61 286	3%	43 794	2%	21 690	2.5%	+ 66.0%
Congo	30 303	1%	35 562	2%	46 737	2%	55 412	3%	21 564	2.5%	- 5.6%
Switzerland	33 390	1%	33 784	2%	34 718	2%	41 356	2%	19 258	2.3%	+ 19.9%
Philippines	81 155	4%	6 421	0%	4 256	0%	55 883	3%	18 169	2.1%	- 25.0%
<i>Other Destinations</i>	<i>697 130</i>	<i>31%</i>	<i>666 461</i>	<i>33%</i>	<i>637 812</i>	<i>33%</i>	<i>744 299</i>	<i>35%</i>	<i>268 782</i>	<i>31.5%</i>	
Extra-EU	2 252 374		2 044 934		1 962 485		2 147 503		852 655		
% change			- 9%		- 4%		+ 9%		- 2.6%		

EU-27 Exports of poultry meat to selected destinations

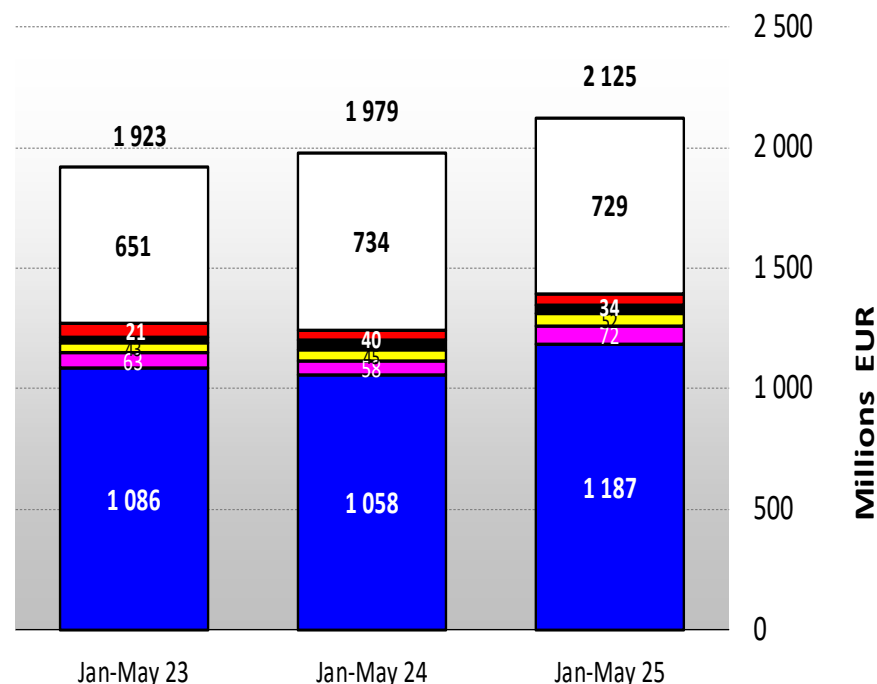
	2021		2022		2023		2024		Jan-May 25		Compared to Jan-May 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	2 009 674	51%	2 652 567	67%	2 593 946	65%	2 681 675	68%	1 186 725	29.9%	+ 12.2%
Ghana	224 103	6%	167 715	4%	156 970	4%	153 988	4%	72 448	1.8%	+ 25.7%
Congo (Dem. Rep.)	116 553	3%	145 766	4%	112 110	3%	112 142	3%	52 116	1.3%	+ 17.0%
Vietnam	35 592	1%	39 533	1%	67 601	2%	86 150	2%	34 423	0.9%	- 13.3%
Ukraine	119 533	3%	102 729	3%	125 678	3%	106 385	3%	50 236	1.3%	+ 12.0%
Saudi Arabia	93 283	2%	159 672	4%	128 754	3%	138 371	3%	42 002	1.1%	- 41.5%
Benin	87 264	2%	106 959	3%	103 984	3%	60 680	2%	39 757	1.0%	+ 134.1%
Congo	26 636	1%	36 276	1%	42 776	1%	47 477	1%	17 594	0.4%	- 10.0%
Switzerland	179 202	5%	210 024	5%	221 569	6%	244 320	6%	109 442	2.8%	+ 17.6%
Philippines	57 220	1%	7 793	0%	6 571	0%	34 778	1%	10 157	0.3%	- 23.6%
<i>Other Destinations</i>	<i>1 023 295</i>	<i>26%</i>	<i>1 107 293</i>	<i>28%</i>	<i>1 186 219</i>	<i>30%</i>	<i>1 289 856</i>	<i>32%</i>	<i>509 999</i>	<i>12.8%</i>	
Extra-EU	3 972 355		4 736 325		4 746 178		4 955 822		2 124 898		
% change			+ 19%		+ 0%		+ 4%		+ 7.4%		

EU-27 poultry meat exports (by destination)

EU EXPORTS of Poultry Meat (TONNES cwe)

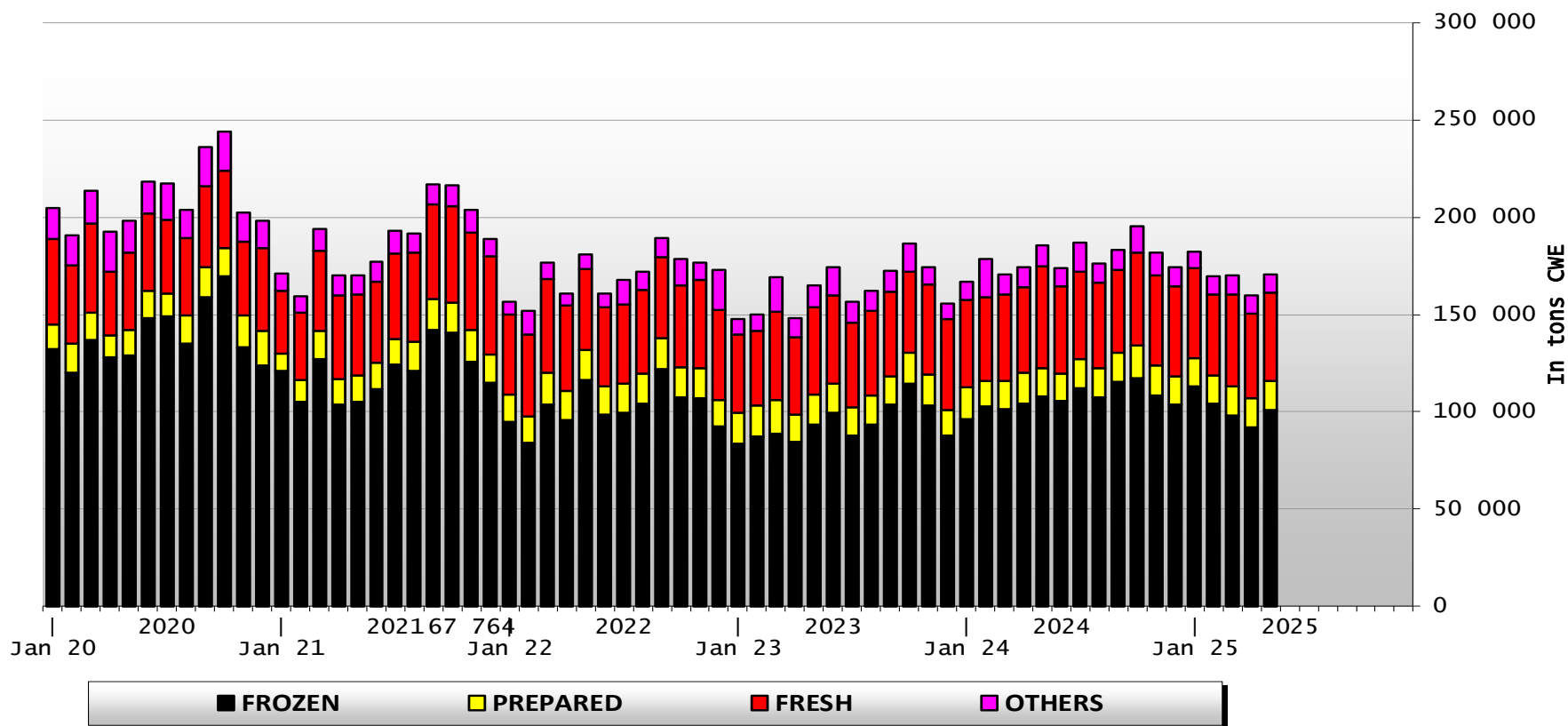


EU EXPORTS of Poultry Meat (Millions EUR)



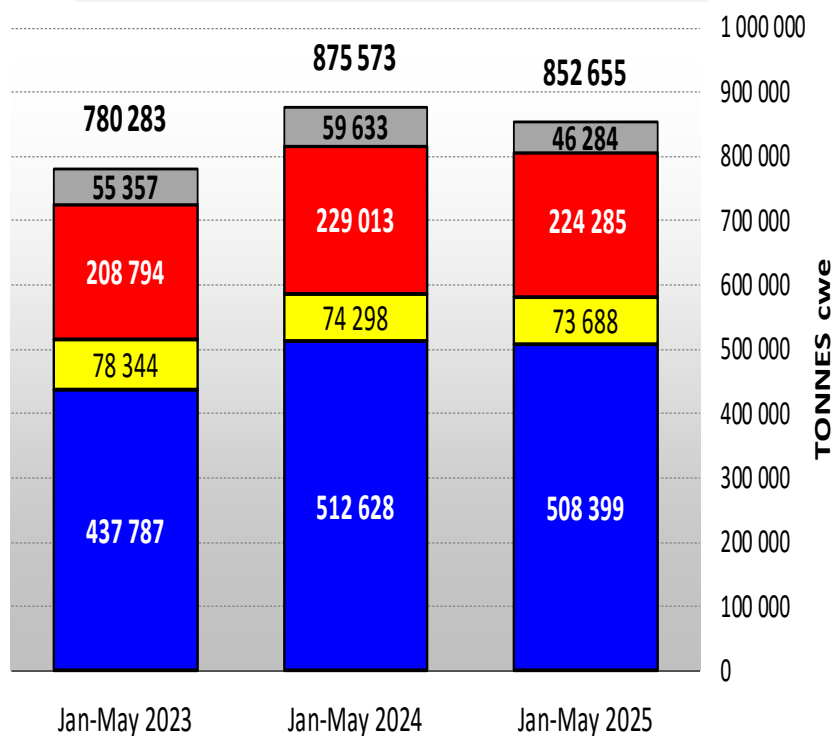
* countries trading less than 42 ('Millions EUR)

Exports of selected Poultry products



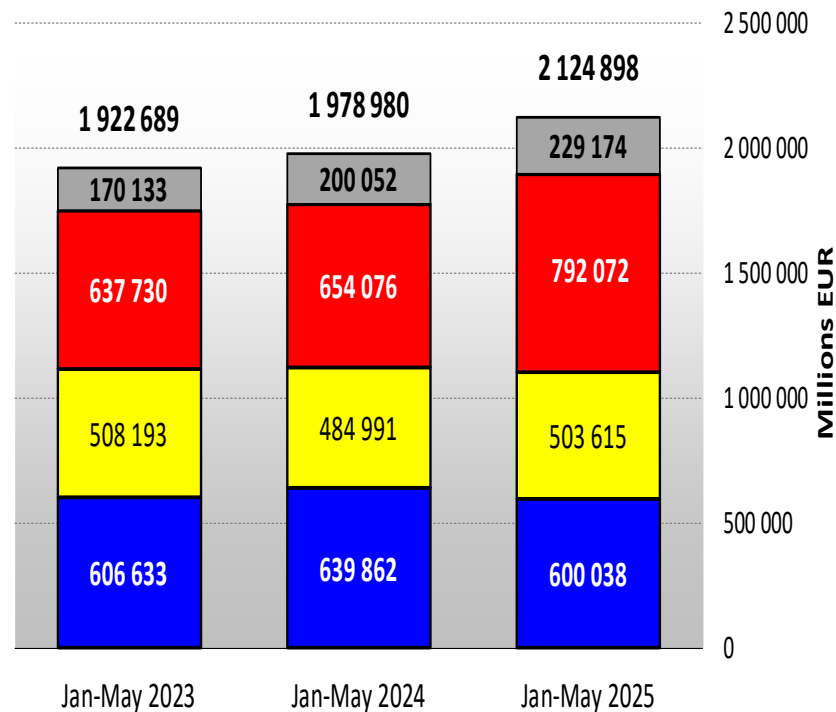
EU-27 poultry meat exports (by meat type)

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

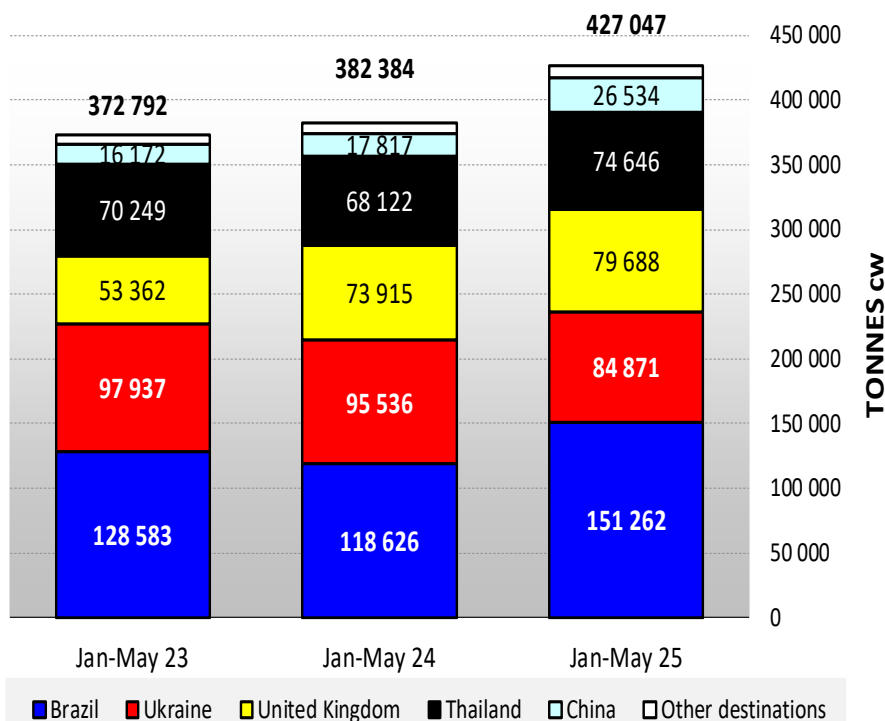
	2021		2022		2023		2024		Jan-May 25	Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	to Jan-May 24
Brazil	251 887	32%	299 536	35%	288 723	32%	286 600	32%	151 262	35.4% + 27.5%
Ukraine	102 892	13%	160 697	19%	231 906	26%	194 484	22%	84 871	19.9% - 11.2%
United Kingdom	274 667	34%	210 738	25%	171 949	19%	196 901	22%	79 688	18.7% + 7.8%
Thailand	130 658	16%	131 954	15%	148 698	17%	157 489	17%	74 646	17.5% + 9.6%
China	20 916	3%	32 864	4%	36 561	4%	45 177	5%	26 534	6.2% + 48.9%
Argentina	3 151	0%	4 096	0%	4 079	0%	6 711	1%	4 796	1.1% +++
Norway	2 508	0%	2 094	0%	2 126	0%	3 240	0%	1 211	0.3% + 14.4%
Other Destinations	10 378	1%	9 447	1%	11 266	1%	11 794	1%	4 038	0.9%
Extra-EU	797 056		851 427		895 307		902 396		427 047	
% change			+ 7%		+ 5%		+ 1%		+ 11.7%	

EU-27 Imports of poultry meat from selected origins

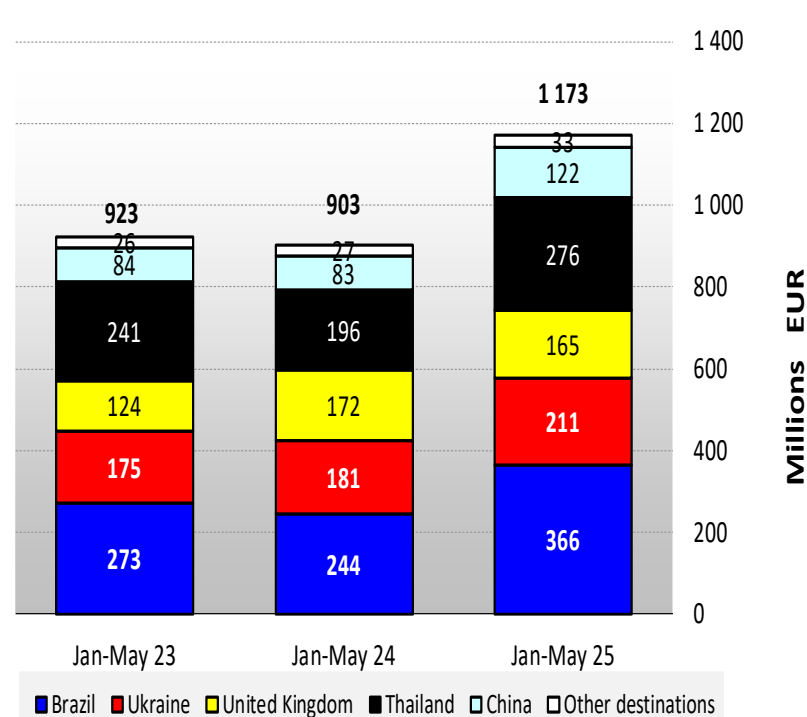
	2021		2022		2023		2024		Jan-May 25		Compared to Jan-May 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	388 472	29%	669 772	31%	598 220	28%	624 041	28%	366 366	31.2%	+ 49.9%
Ukraine	166 208	12%	324 836	15%	418 449	20%	400 671	18%	210 695	18.0%	+ 16.7%
United Kingdom	327 273	24%	369 160	17%	354 848	17%	400 331	18%	165 319	14.1%	- 4.0%
Thailand	317 487	24%	519 175	24%	490 197	23%	490 937	22%	276 304	23.5%	+ 41.2%
China	95 081	7%	186 175	9%	183 071	9%	207 903	9%	121 920	10.4%	+ 47.1%
Argentina	6 508	0%	11 463	1%	11 360	1%	16 070	1%	10 030	0.9%	+++
Norway	7 914	1%	8 286	0%	8 888	0%	10 537	0%	6 141	0.5%	+ 47.9%
Switzerland	5 300	0%	8 975	0%	6 730	0%	6 205	0%	3 165	0.3%	+ 15.1%
Bosnia-Herz.	10 345	1%	10 728	1%	9 362	0%	17 175	1%	3 981	0.3%	- 20.8%
Moldova			13	0%			344	0%	1 804	0.2%	+++
<i>Other Destinations</i>	21 485	2%	20 473	1%	27 445	1%	20 601	1%	7 573	0.6%	
Extra-EU	1 346 074		2 129 057		2 108 570		2 194 815		1 173 298		
% change			+ 58%		- 1%		+ 4%		+ 29.9%		

EU27 poultry meat imports (by origin)

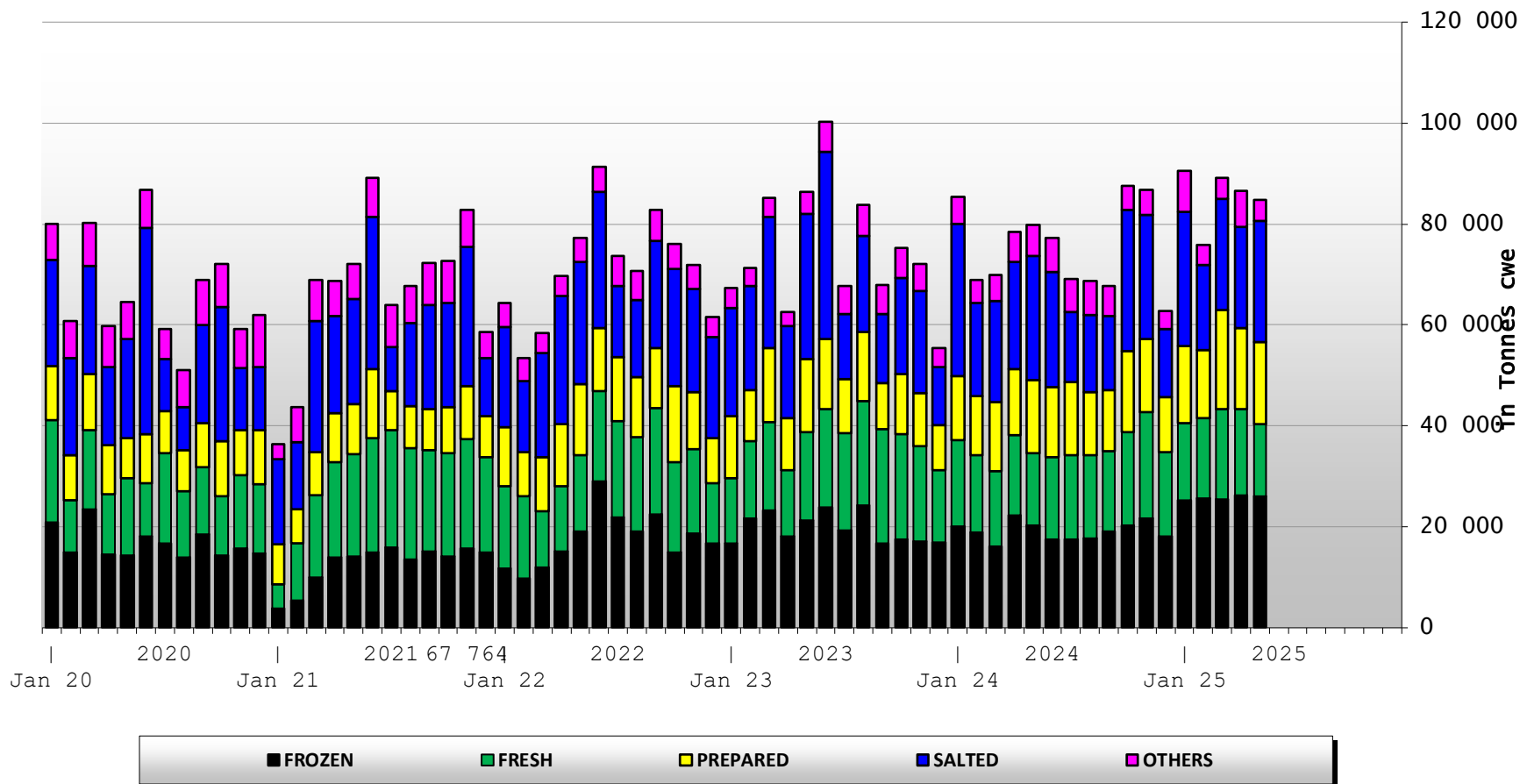
EU IMPORTS of Poultry Meat (TONNES cwe)



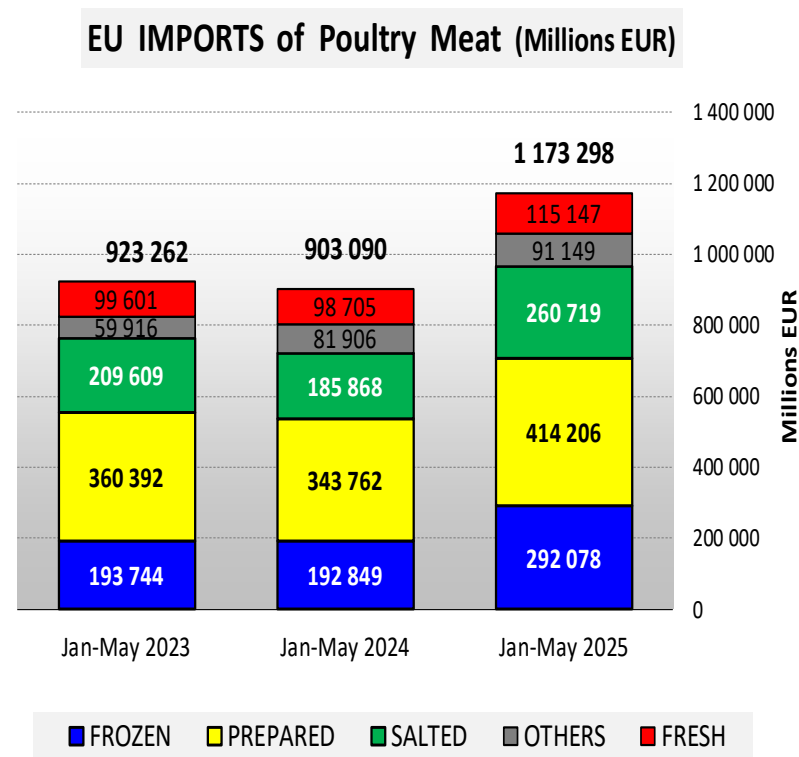
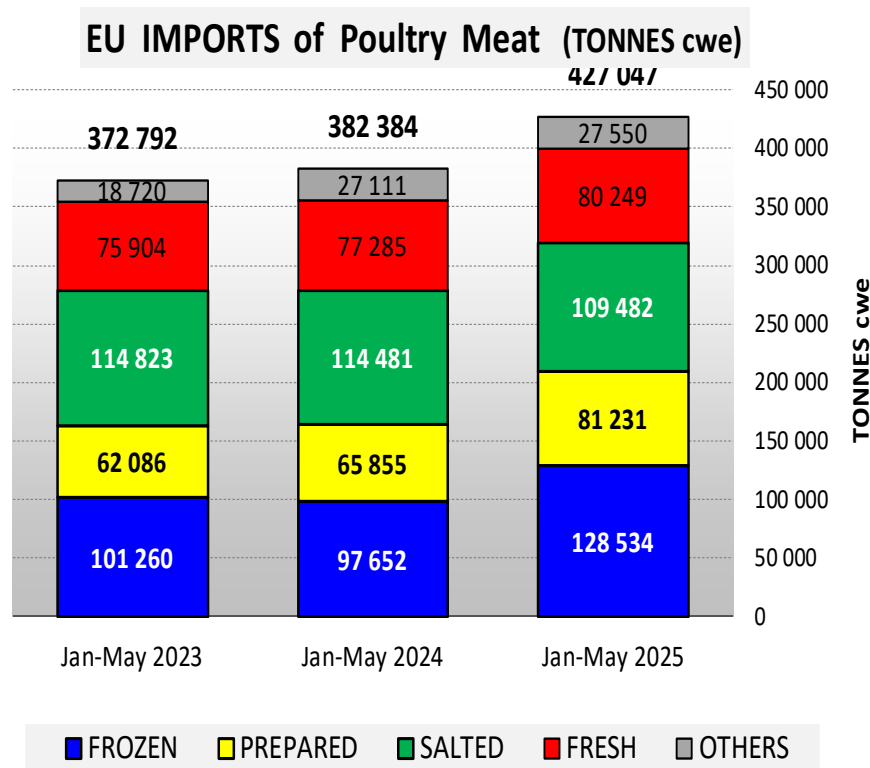
EU IMPORTS of Poultry Meat (Millions EUR)



Imports of selected Poultry products

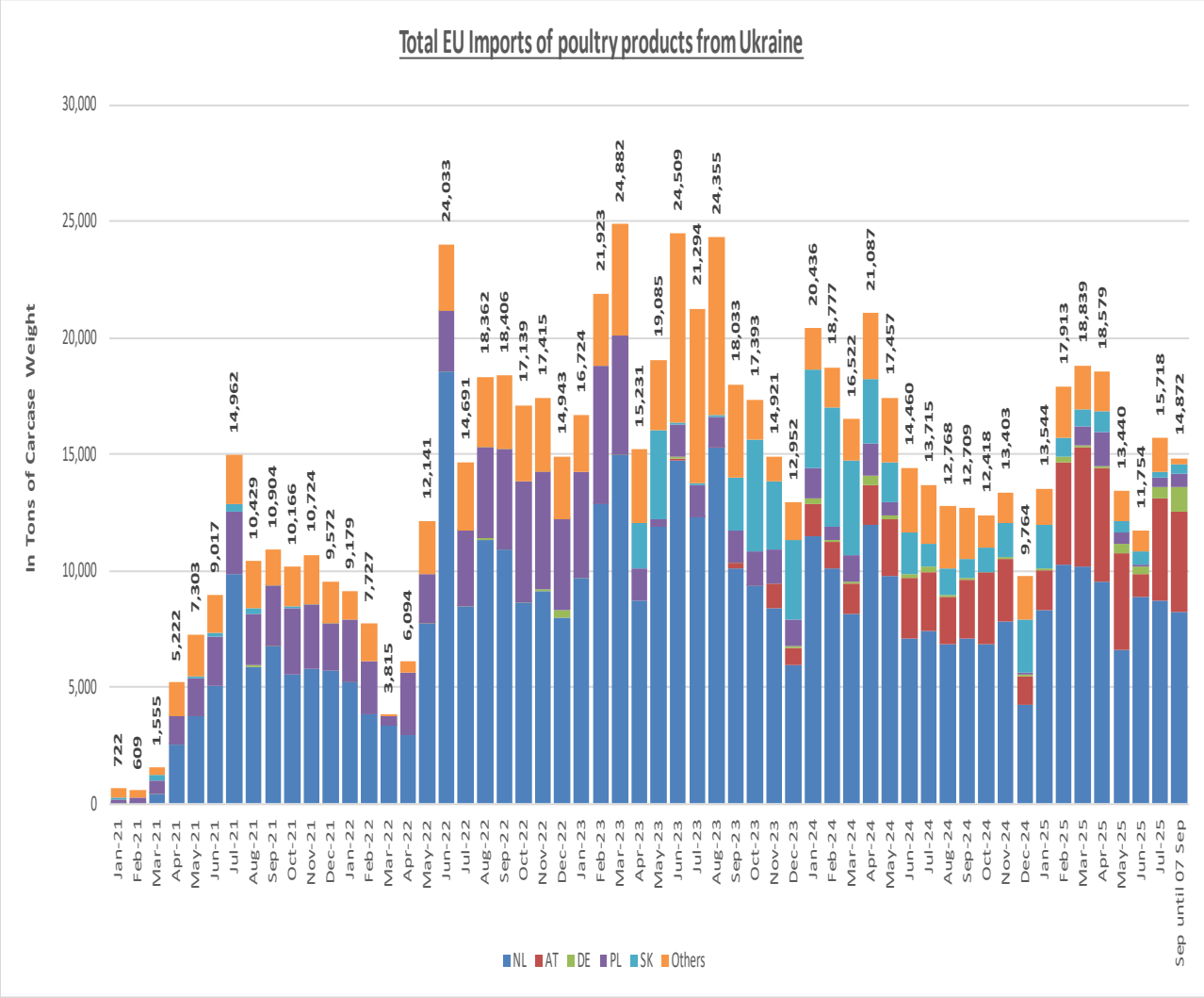


EU27 poultry meat imports (by meat type)



TRADE

EU IMPORTS



	2022	2023	2024	2025 (until 07 Sep)
Poultry EU total	188,000	231,302	183,516	127,099
NL	98,225	134,453	99,124	72,177
AT	0	2,186	24,530	30,566
SK	131	19,456	27,610	6,120
PL	38,127	26,862	4,943	4,041
DE	717	158	1,779	2,904
LT	3,455	4,282	4,439	2,262
EL	112	769	3,103	2,017
ES	0	1,895	2,140	1,510
IT	257	1,245	1,097	1,458
CZ	527	971	3,357	1,089
BG	23	67	1,470	1,073
CY	98	140	1,094	832
RO	1,627	3,947	7,655	356
EE	1	88	320	294
PT	0	0	49	228
HU	20,565	34,055	261	122
LV	0	105	0	28
BE	0	98	55	23
IE	0	31	0	0
FI	0	0	0	0
FR	66	473	491	0
SE	15	22	0	0

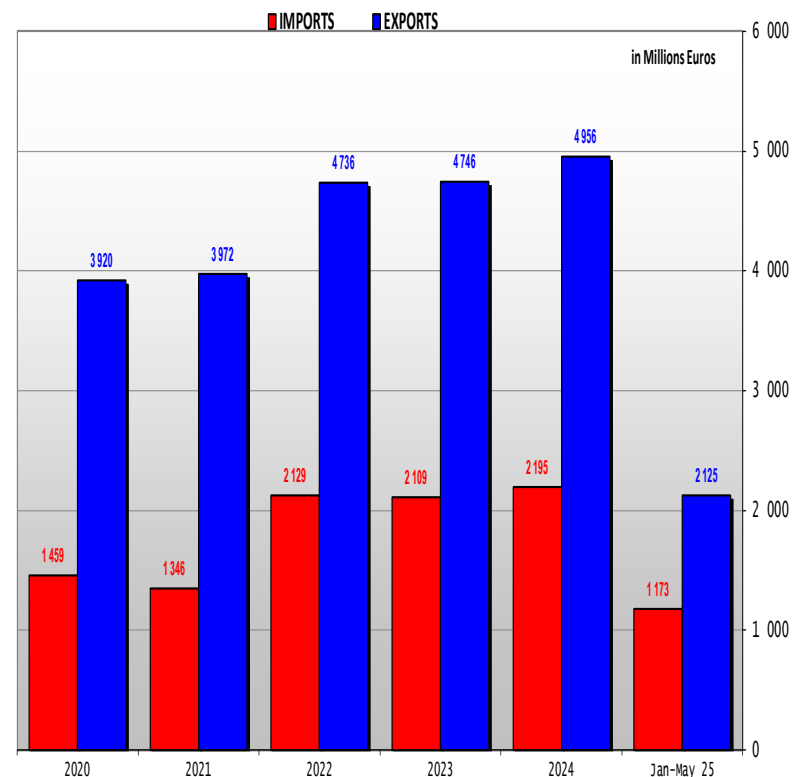
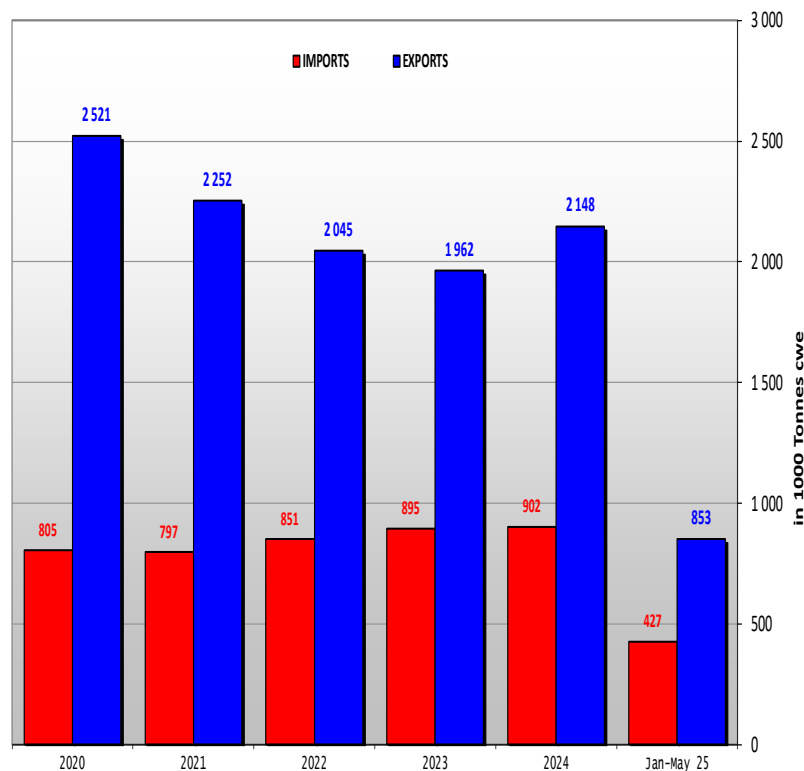


TRADE

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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