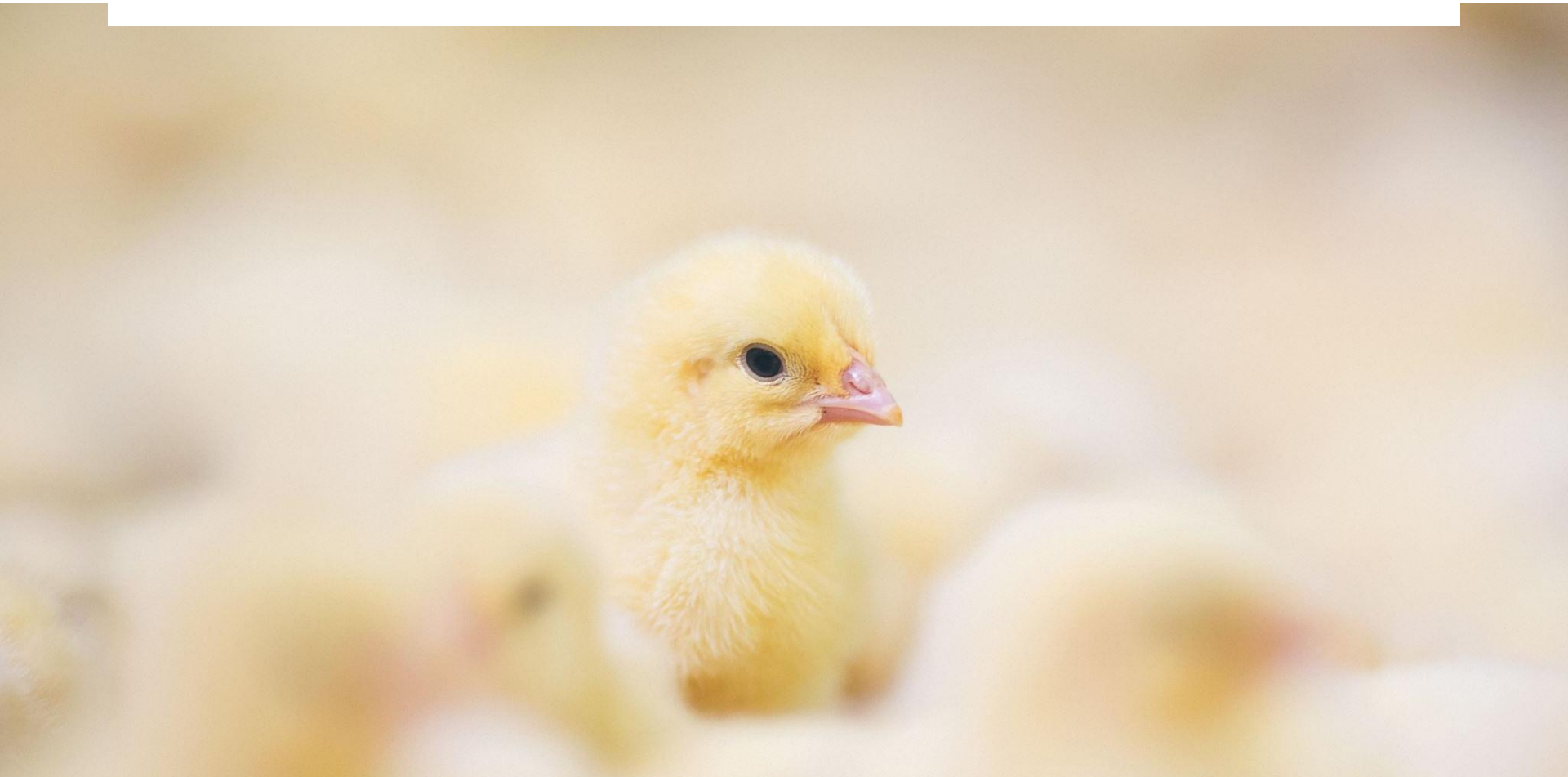


Market Situation for Poultry

CMO GREX on Animal Products - *11 December 2025*



FORECAST

EU production of poultry

Qty in Tonnes % change

Source : Eurostat & Forecast 2025 by MS

	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	NA	NA		
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 % change
Source : Eurostat & Forecast 2025 by MS

	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	NA	NA		
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	NA	NA		
AT	NA	NA		
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 % change
Source : Eurostat & Forecast 2025 by MS

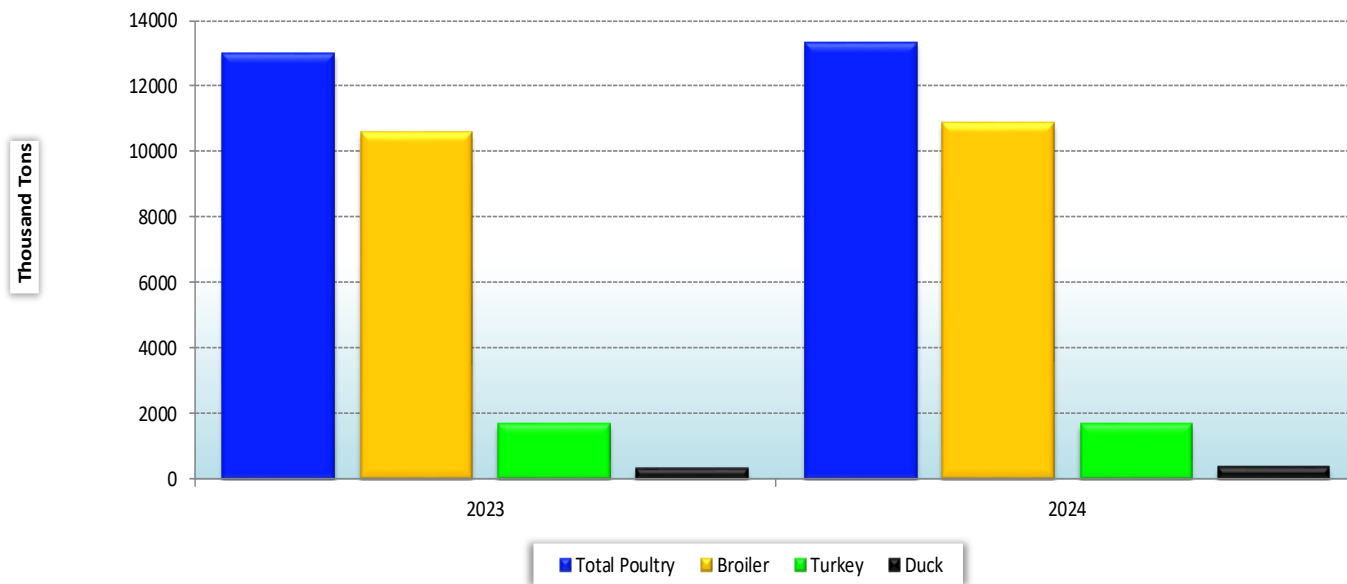
	2023	2024	%2024/2023	trend 2025/2024
PL	409,170	367,310	-10.2	↓
DE	406,000	422,000	3.9	↓
PL	409,170	367,310	-10.2	↓
IT	211,130	242,750	15.0	↑
FR	244,920	240,230	-1.9	↓
ES	231,590	248,030	7.1	↓
IE	14,720	16,400	11.4	↑
CZ	1,740	1,720	-1.1	↑
HR	NA	NA		
FI	8,840	8,810	-0.3	↓
BE	NA	6,570		↑
SI	5,220	5,590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

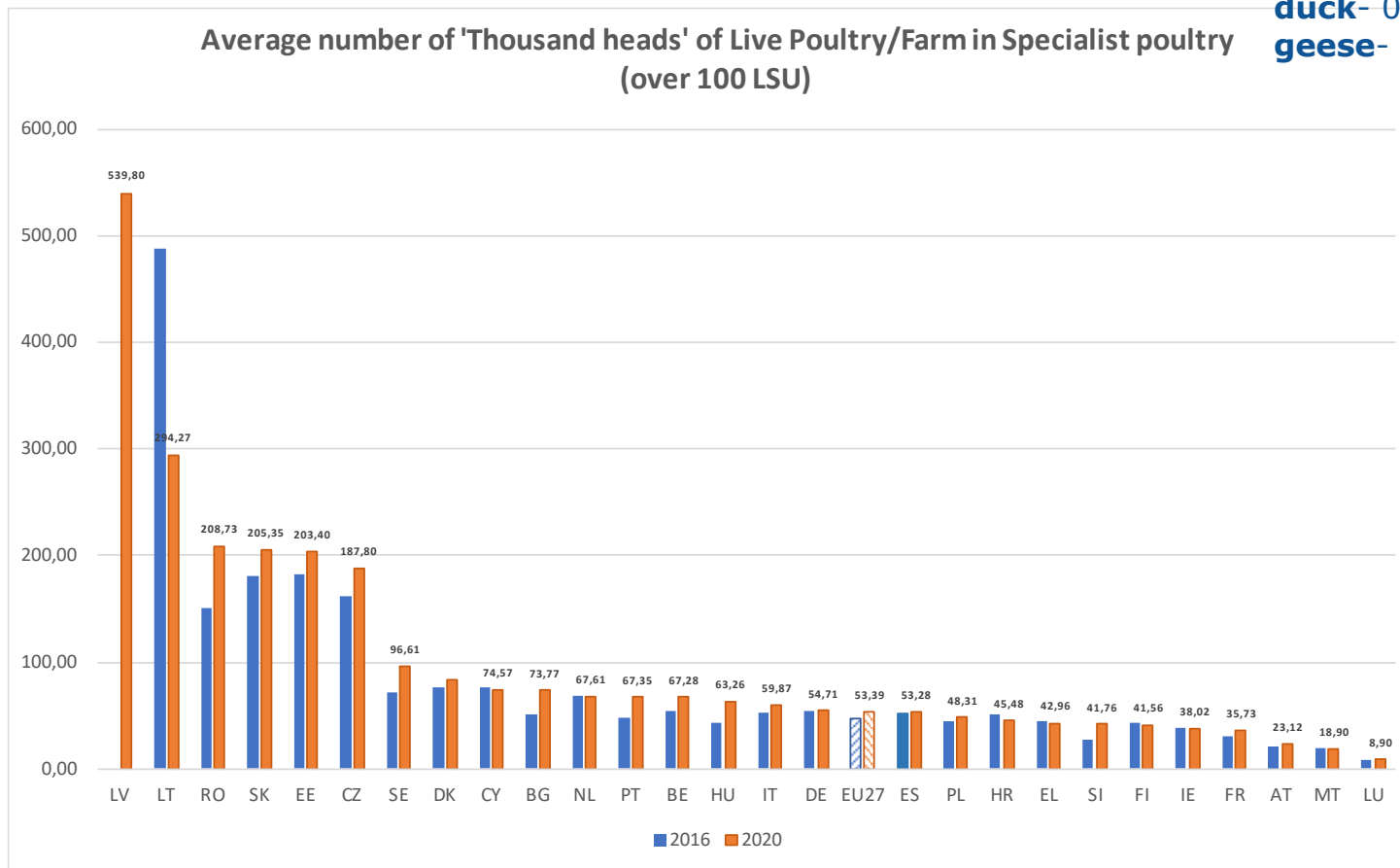


	2023	2024	% 2024/ 2023	% 2025/ 2024
Total Poultry	12,974	13,319	+ 2.7%	↑
Broiler	10,588	10,857	+ 2.5%	↑
Turkey	1,651	1,667	+ 1.0%	↓
Duck	314	351	+ 11.8%	↑

* 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

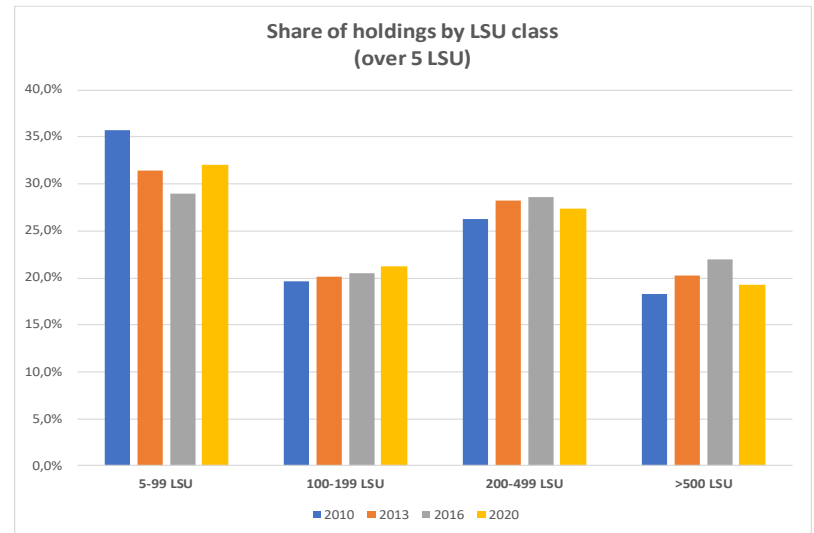
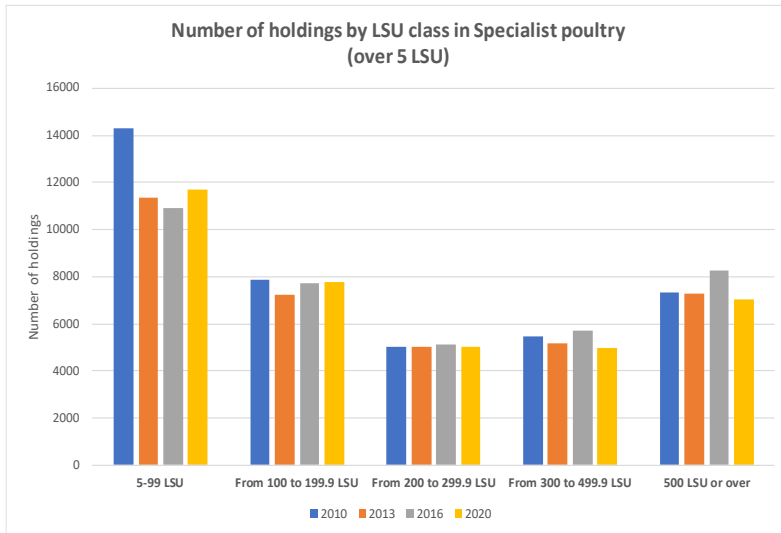
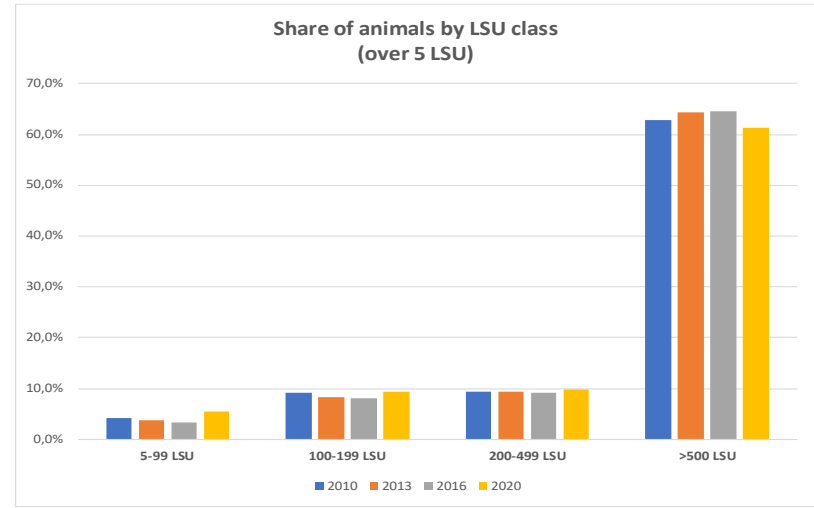
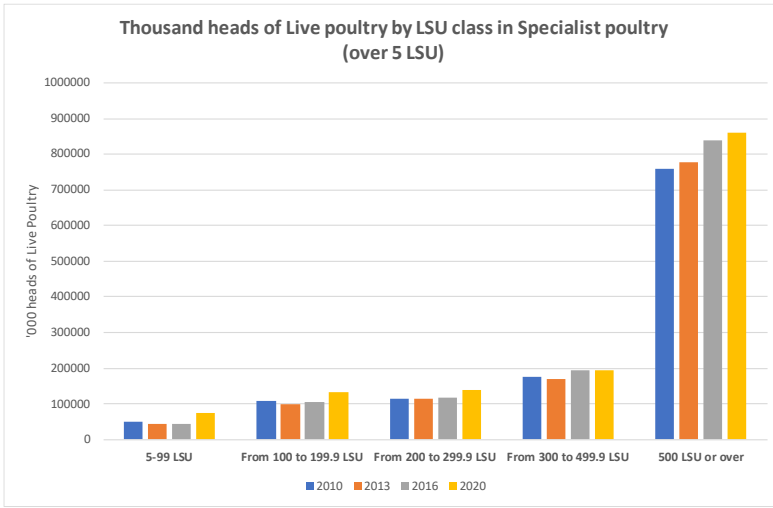


Specialist poultry - EU

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

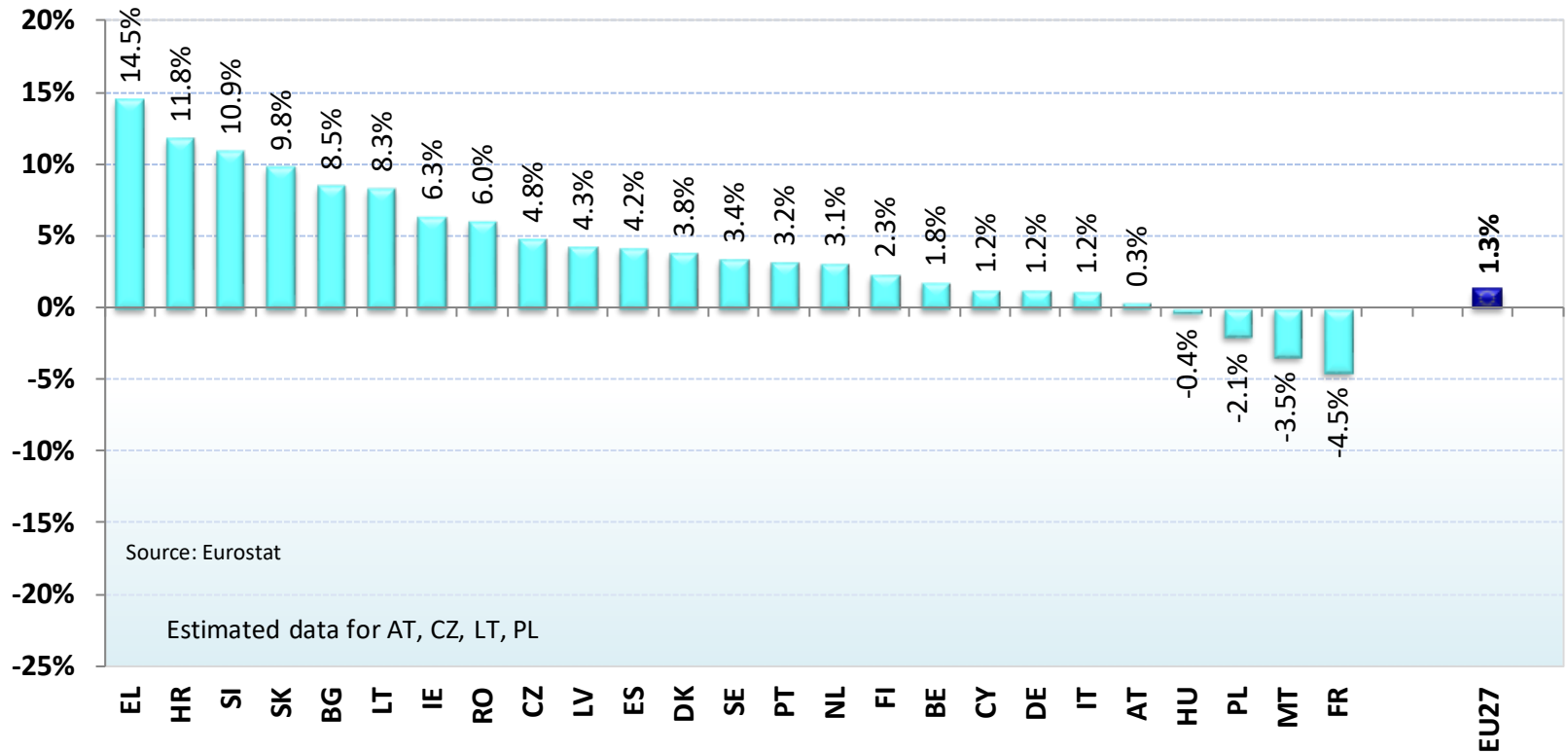


FARM STRUCTURE SURVEY

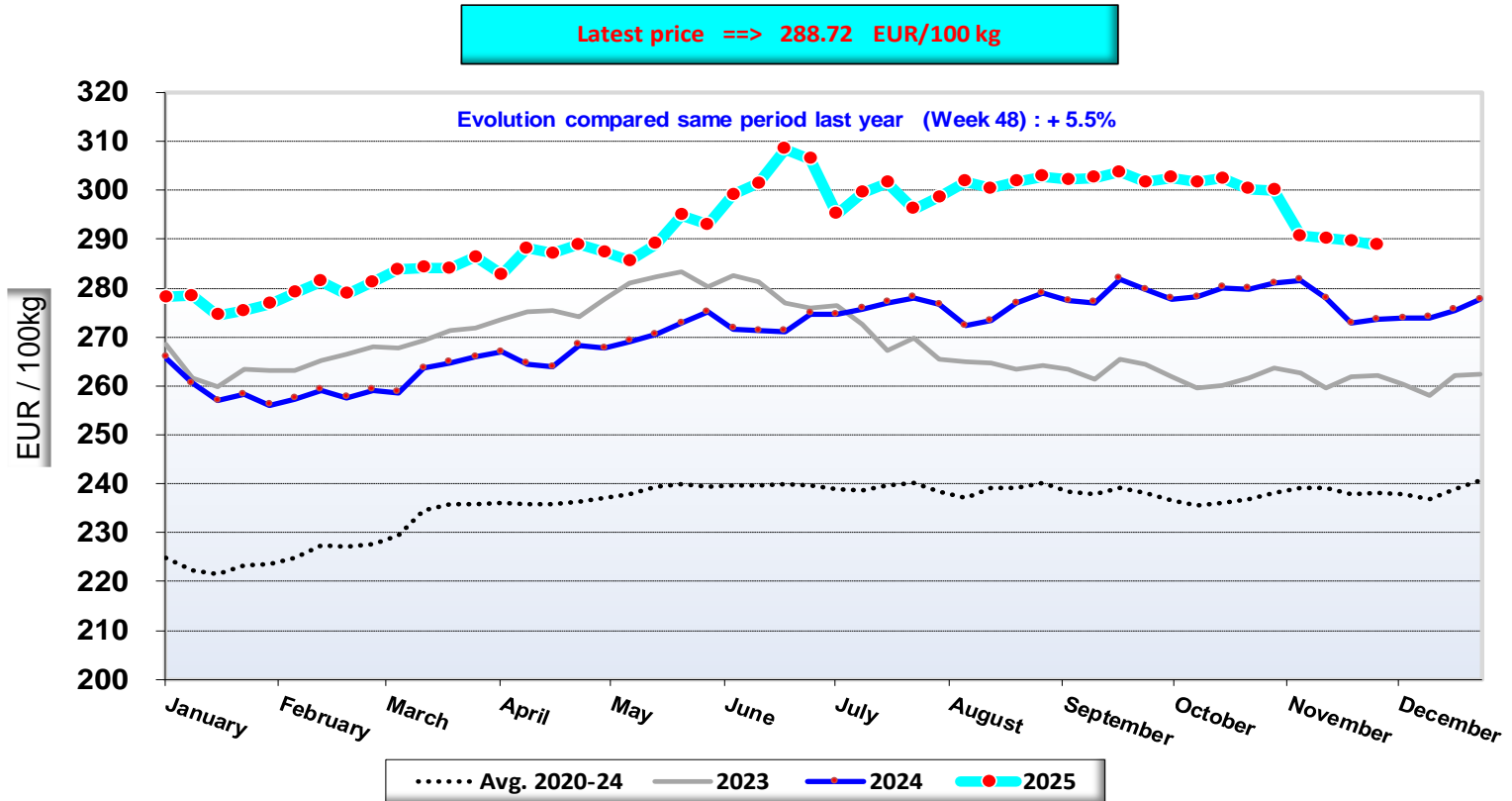


PRODUCTION

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



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

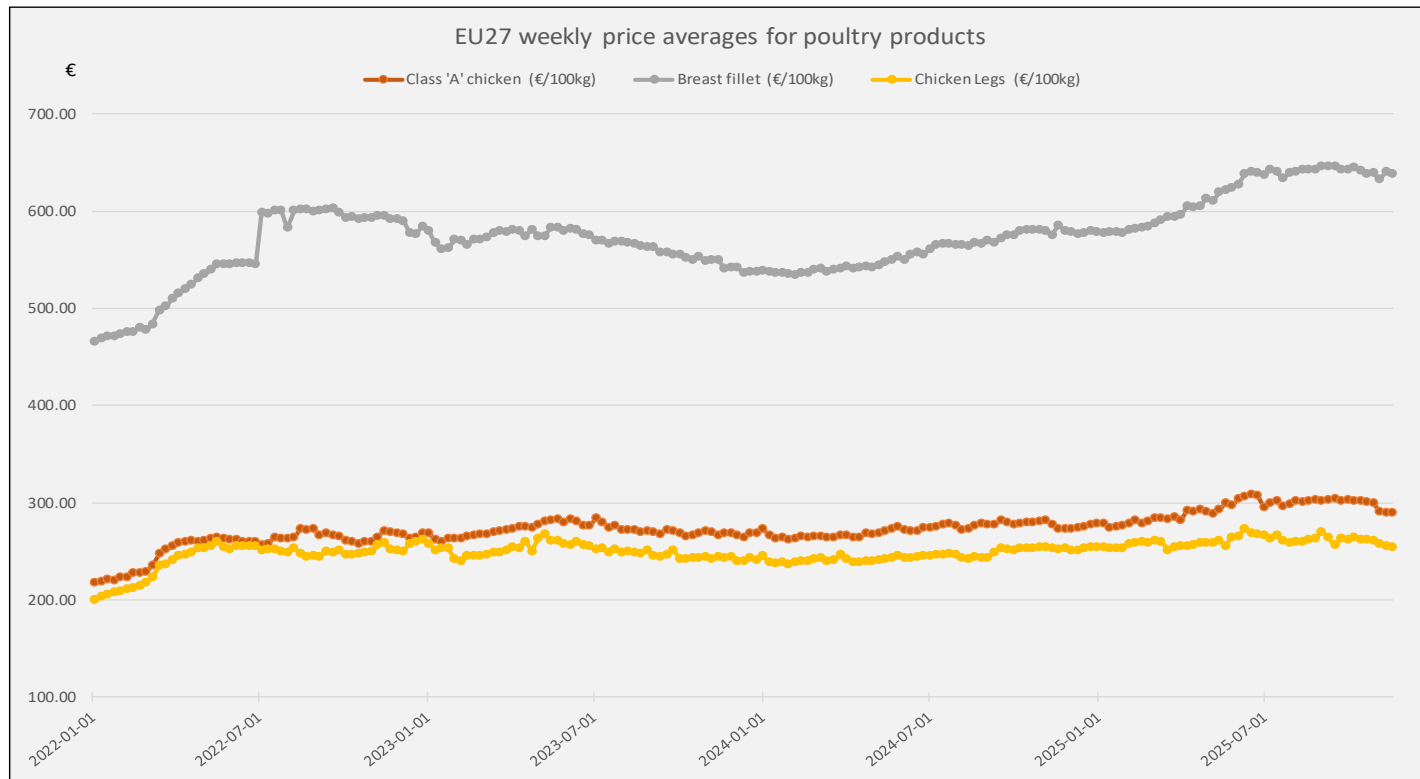


Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)



Weekly prices of poultry products

Week - 47 EU27 weekly price averages for poultry products



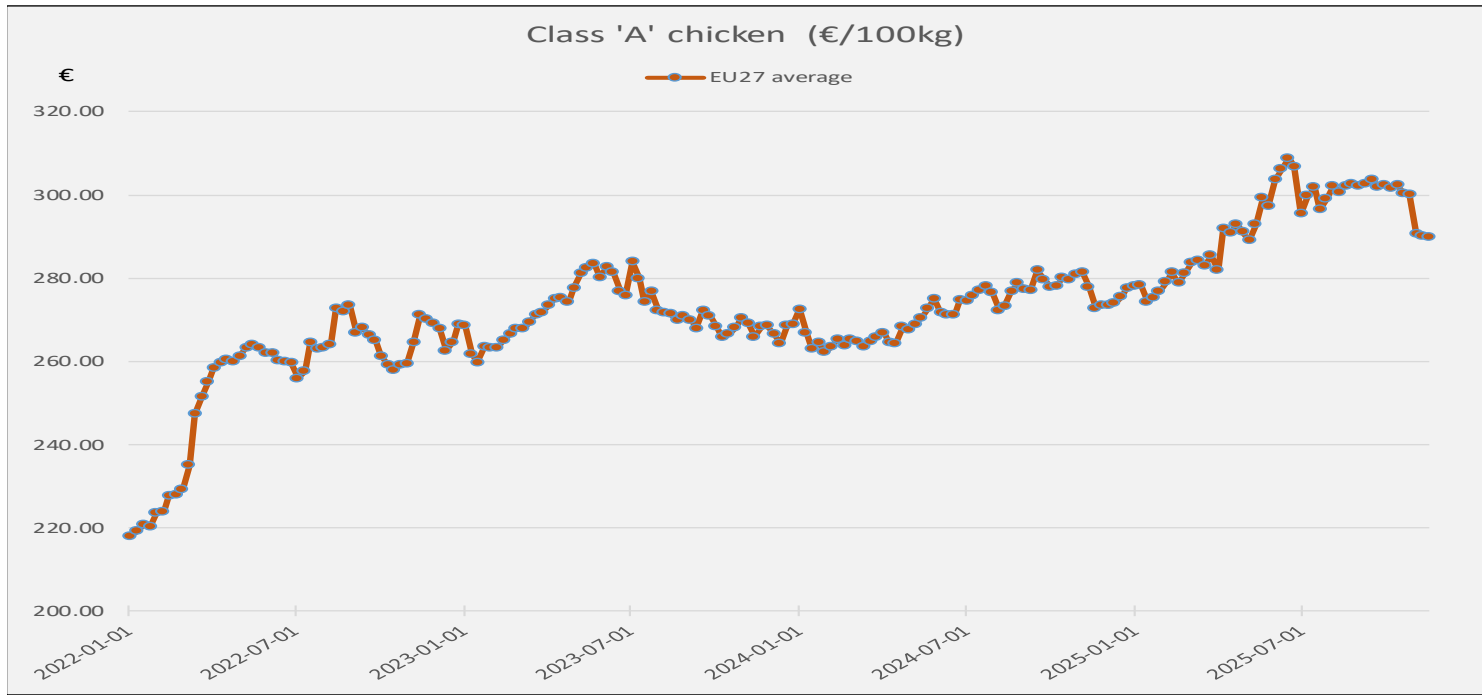
Week - 47	Class 'A' chicken	Breast fillet	Chicken Legs
EU27	289.90	638.26	254.71

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 - 47 Class 'A' chicken



Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	289.90	- 0.1%	- 3.5%	+ 6.3%

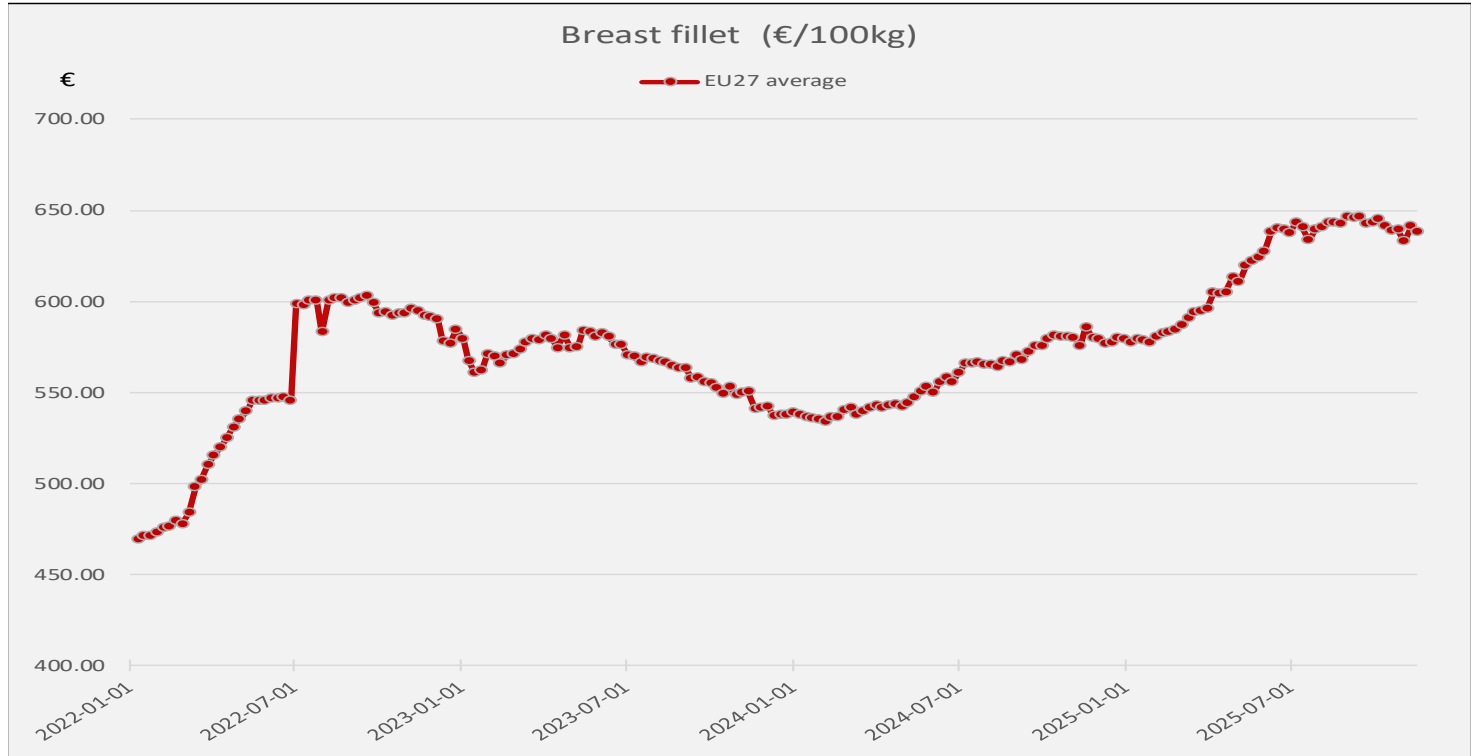
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)
! Prices reported by MS are preliminary and may be subject to change !



Weekly price of 'Breast fillet'

Week - 47

Breast fillet



Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	638.26	- 0.4%	- 0.1%	+ 9.0%

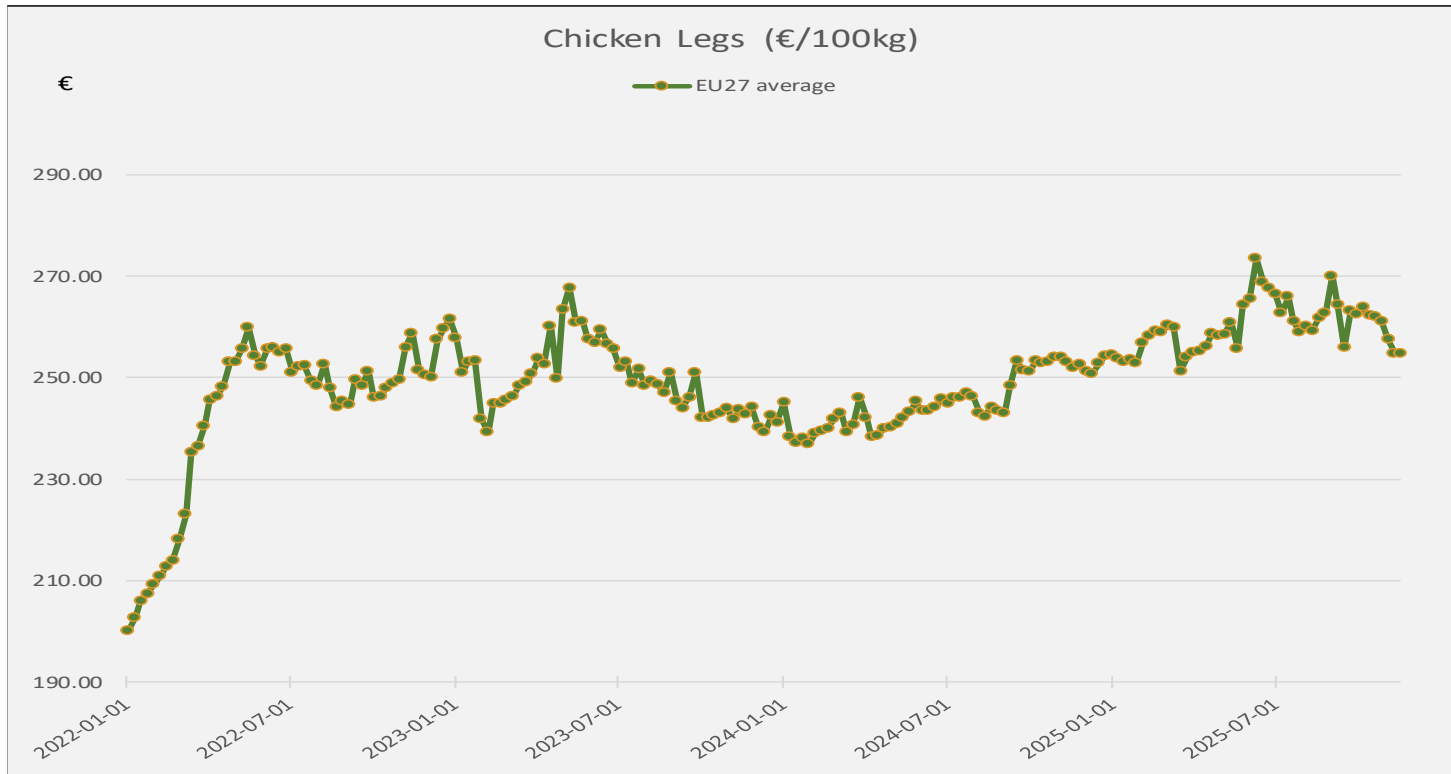
Source: MS notifications (Commission Implementing Regulation (EU) 2017/1185)

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



Weekly price of 'Chicken legs'

Week - 47 Chicken Legs

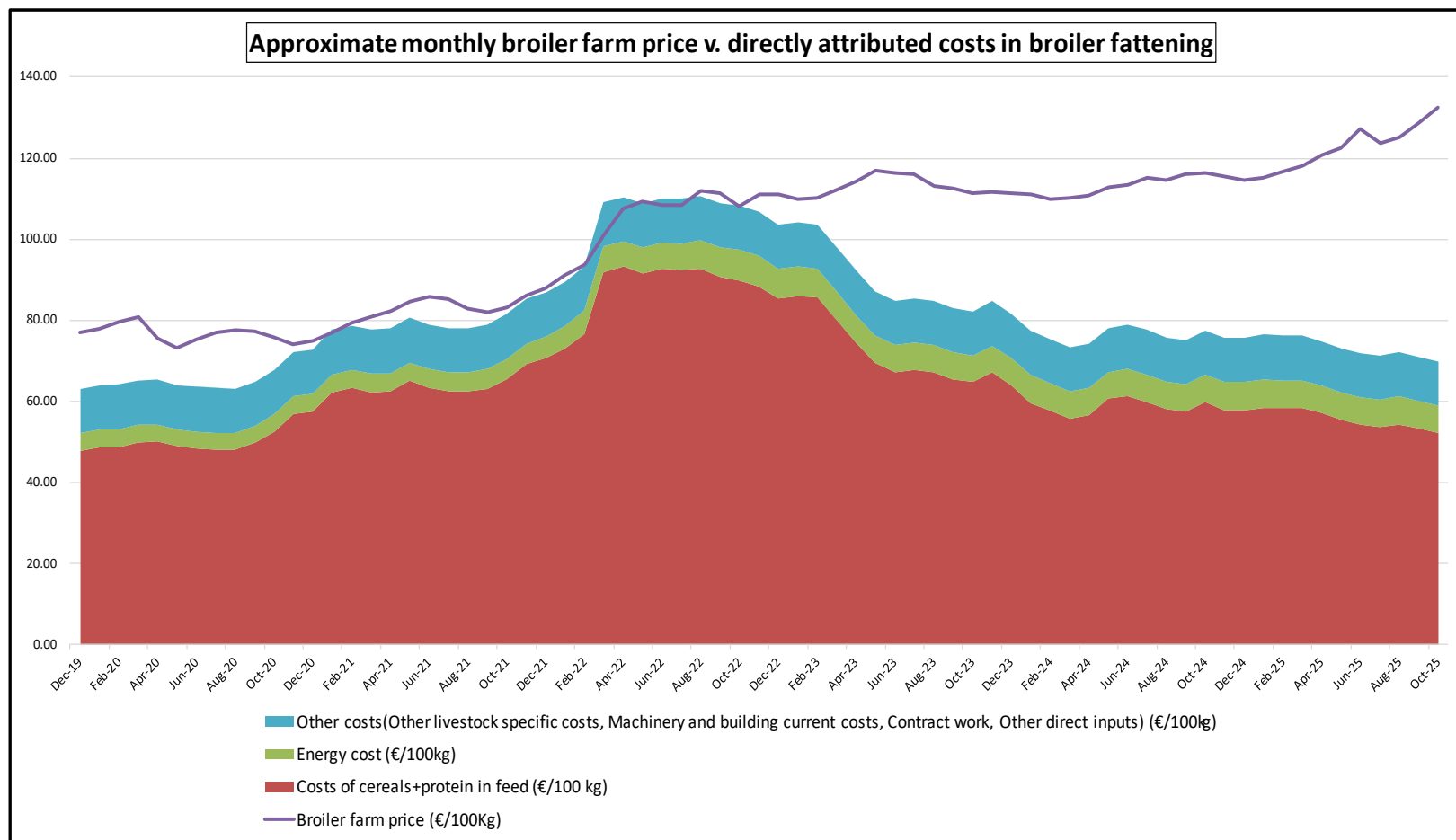


Week - 47	€/100kg	Change 1 week	Change 4 weeks	Change 1 year
EU27	254.71	- 0.1%	- 2.8%	+ 1.1%

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



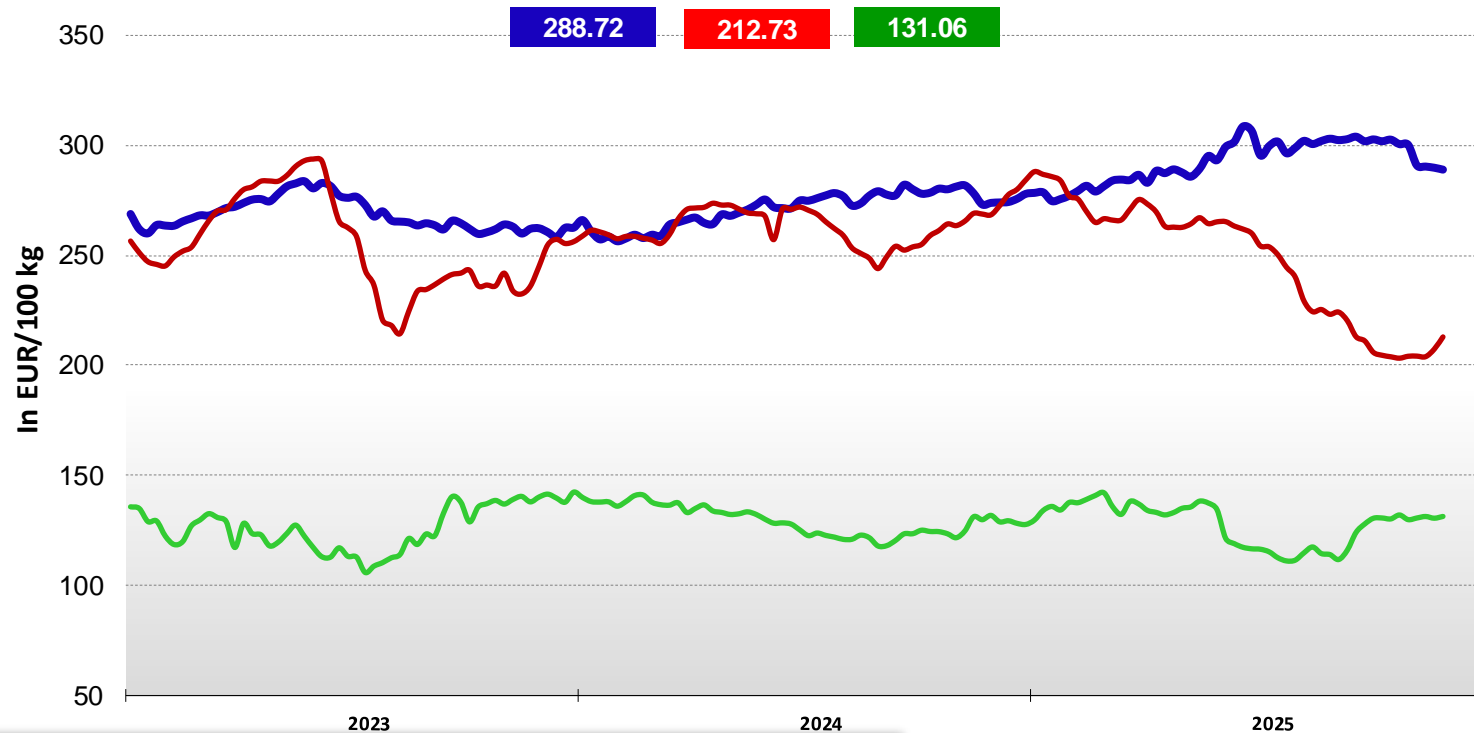
COST BROILER PRODUCTION



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'.

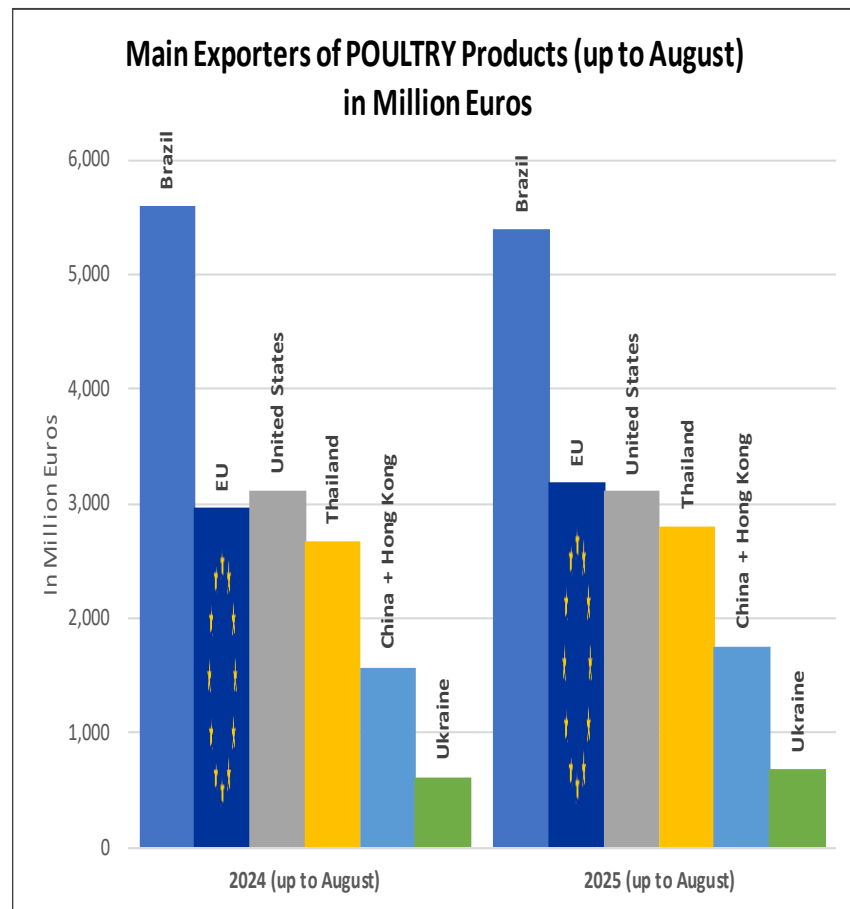
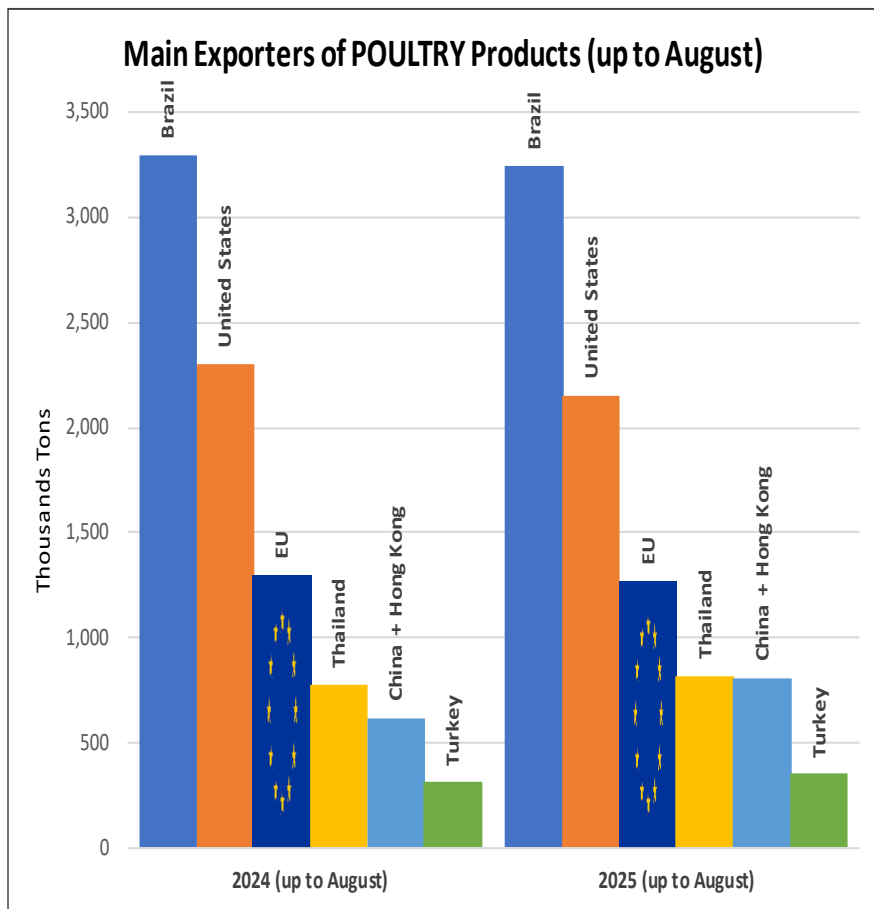


Broiler prices in EU, USA and Brazil



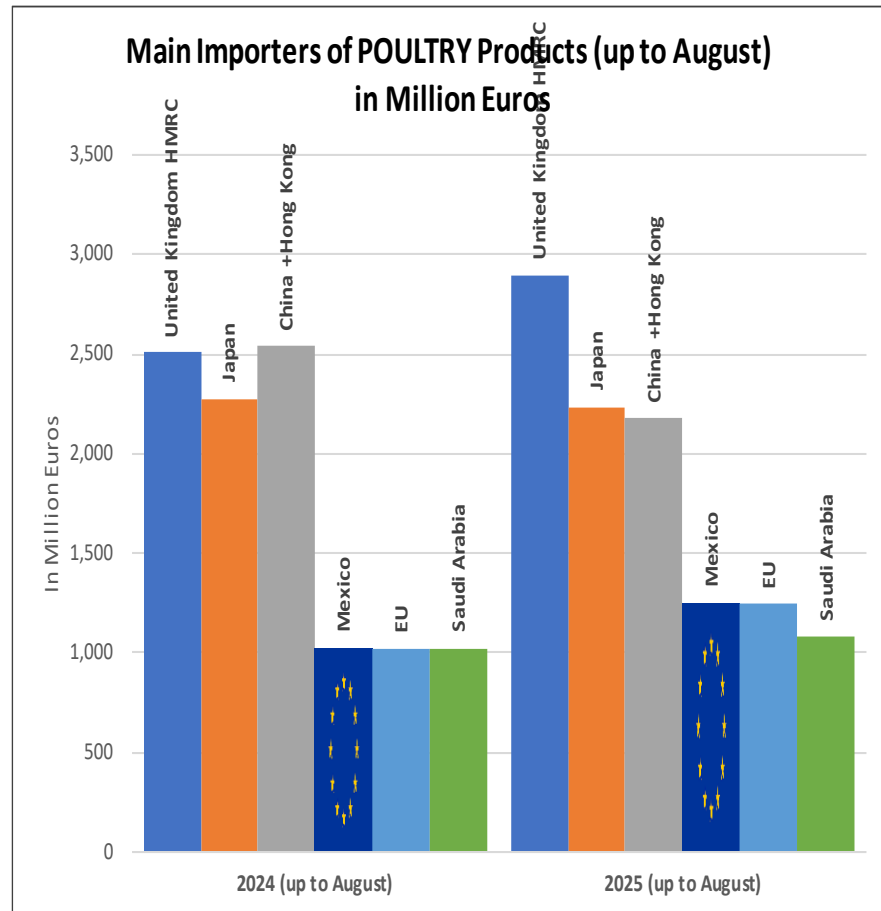
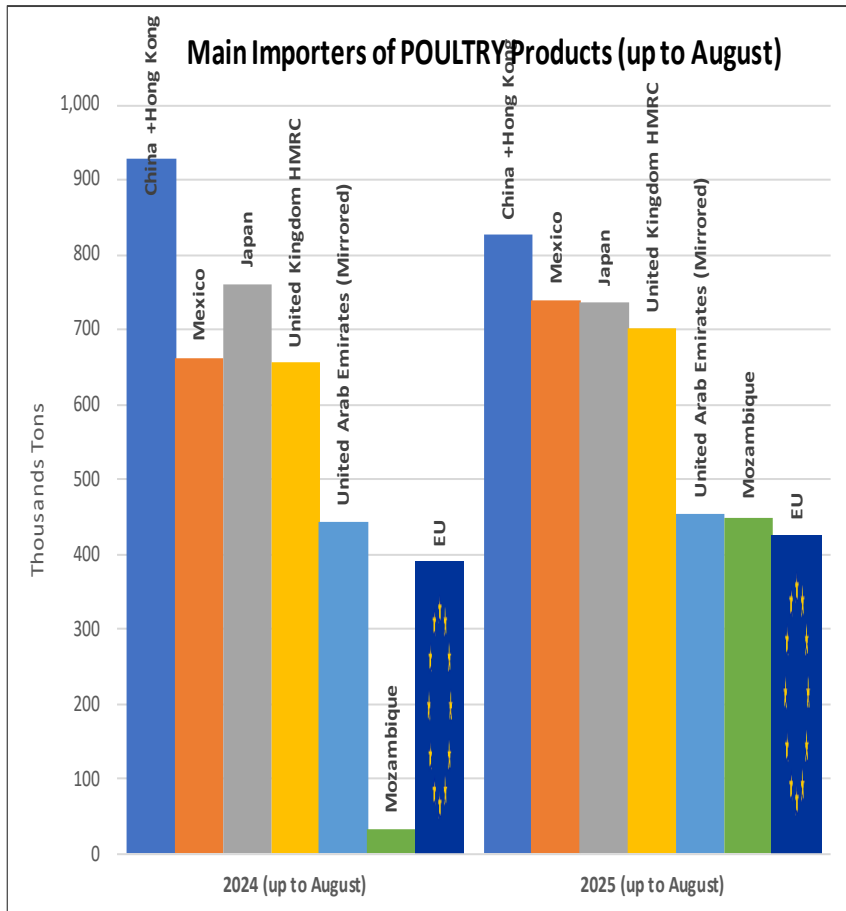
Sources : EU = weighted average of country prices - Broiler 65%
US = weekly USDA prices - Fresh chicken grade A ,Chicago
BR = CEPEA/ESALQ chilled chicken prices - São Paulo State

— EU — US — BR



Source: Trade Data Monitor





Source: Trade Data Monitor

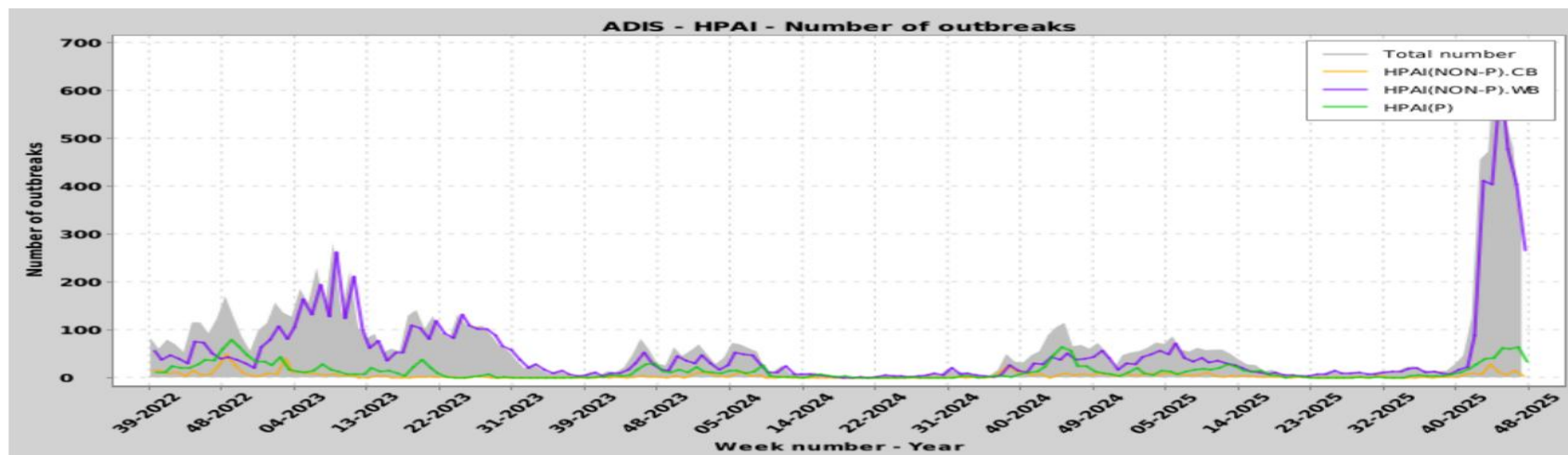


Highly pathogenic avian influenza (HPAI)

Number of outbreaks of HPAI and number of animals concerned by country (01/10/2025 – 04/12/2025)

Member State	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
DE	143	2,018,575	40.3%	22.4%
ES	8	1,780,185	2.3%	19.7%
FR	87	1,113,208	24.5%	12.3%
IT	29	1,099,080	8.2%	12.2%
NL	18	1,079,358	5.1%	12.0%
PL	20	576,254	5.6%	6.4%
BE	9	377,077	2.5%	4.2%
DK	8	293,902	2.3%	3.3%
PT	5	134,832	1.4%	1.5%
CZ	9	134,010	2.5%	1.5%
BG	5	117,641	1.4%	1.3%
SE	3	106,967	0.8%	1.2%
<i>Other MS</i>	11	197,527	3.1%	2.2%
Total	355	9,028,616	100.0%	100.0%

Species	Nr of outbreaks	Nr of animals	% of outbreaks	% of animals
Broiler/Chicken	31	1,359,480	8.7%	15.1%
Laying hen	44	4,132,327	12.4%	45.8%
Duck	80	941,792	22.5%	10.4%
Turkey	122	1,732,365	34.4%	19.2%
Goose	21	70,675	5.9%	0.8%
Quail	2	67,000	0.6%	0.7%
Guinea fowl	1	13,000	0.3%	0.1%
Pheasant	5	90,073	1.4%	1.0%
Mixed	39	246,852	11.0%	2.7%
No information	10	375,052	2.8%	4.2%
Total	355	9,028,616	100.0%	100.0%



EU-27 Exports of poultry meat to selected destinations

In tons of carcass weight

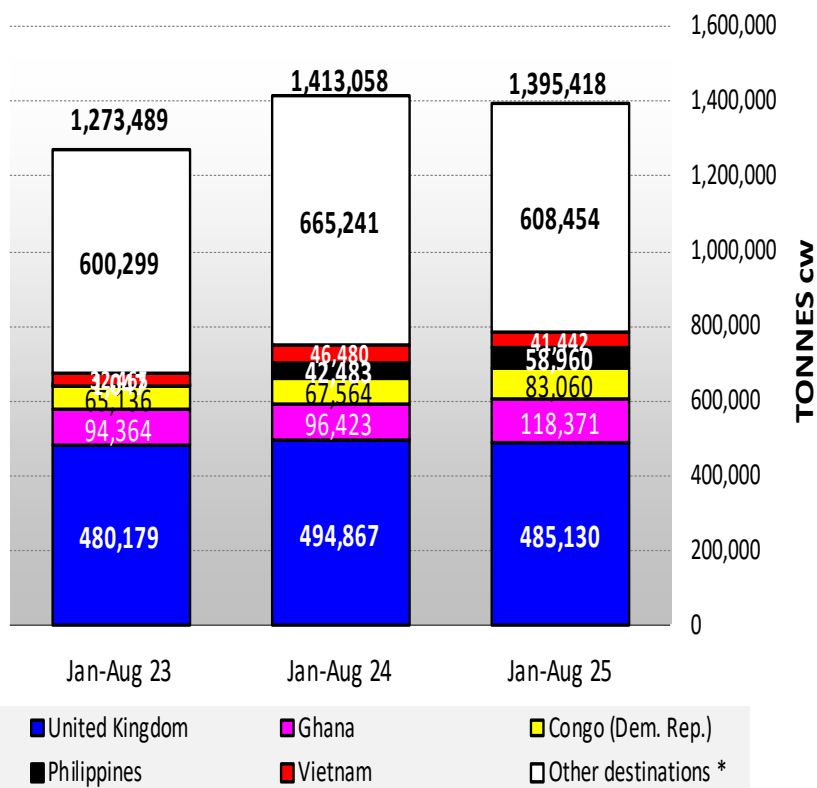
	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
United Kingdom	725,611	32%	747,161	37%	721,851	37%	748,748	35%	485,130	34.8%	- 2.0%
Ghana	228,066	10%	156,456	8%	149,222	8%	154,583	7%	118,371	8.5%	+ 22.8%
Congo (Dem. Rep.)	139,852	6%	125,421	6%	101,020	5%	109,805	5%	83,060	6.0%	+ 22.9%
Philippines	81,155	4%	6,421	0%	4,230	0%	55,700	3%	58,960	4.2%	+ 38.8%
Vietnam	31,784	1%	29,751	1%	54,198	3%	69,029	3%	41,442	3.0%	- 10.8%
Congo	30,303	1%	35,562	2%	46,737	2%	55,412	3%	40,609	2.9%	+ 16.5%
Saudi Arabia	58,457	3%	74,590	4%	66,759	3%	66,994	3%	38,362	2.7%	- 23.5%
Ukraine	162,267	7%	105,810	5%	84,639	4%	58,696	3%	37,966	2.7%	- 4.2%
Switzerland	33,390	1%	33,784	2%	34,685	2%	41,300	2%	34,462	2.5%	+ 30.4%
Mozambique	23,774	1%	26,657	1%	33,031	2%	41,708	2%	31,056	2.2%	+ 24.2%
<i>Other Destinations</i>	<i>737,714</i>	<i>33%</i>	<i>703,320</i>	<i>34%</i>	<i>665,823</i>	<i>34%</i>	<i>745,925</i>	<i>35%</i>	<i>426,000</i>	<i>30.5%</i>	
Extra-EU	2,252,374		2,044,934		1,962,196		2,147,898		1,395,418		
% change			- 9%		- 4%		+ 9%		- 1.2%		

EU-27 Exports of poultry meat to selected destinations

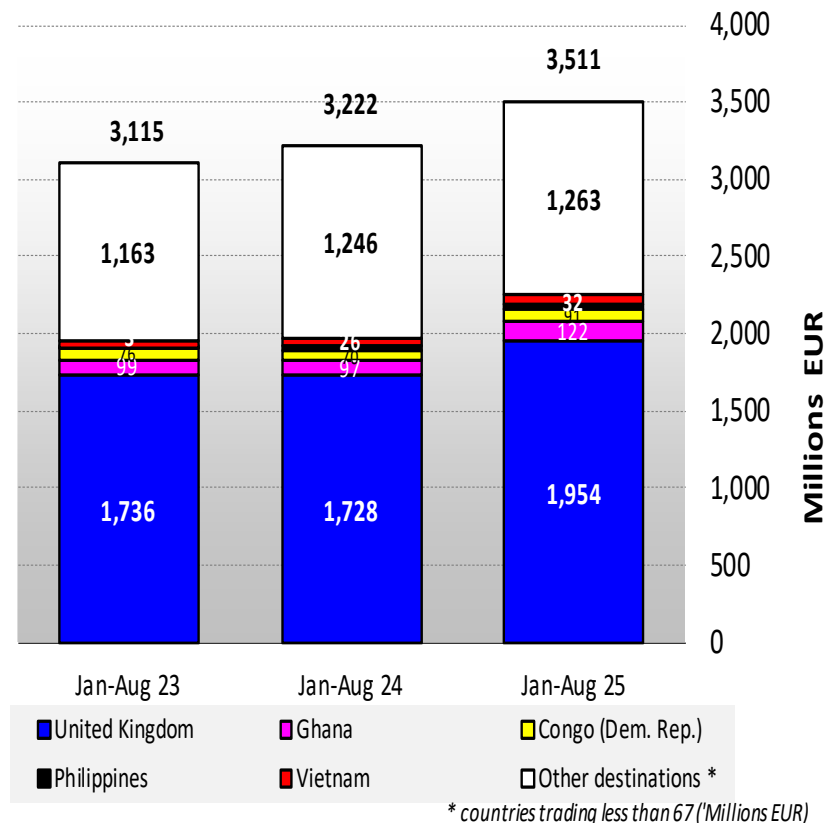
	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
United Kingdom	2,009,674	51%	2,652,567	67%	2,594,042	65%	2,683,130	68%	1,953,656	49.2%	+ 13.1%
Ghana	224,103	6%	167,715	4%	156,970	4%	153,987	4%	121,946	3.1%	+ 26.0%
Congo (Dem. Rep.)	116,553	3%	145,766	4%	112,110	3%	112,142	3%	91,160	2.3%	+ 30.9%
Philippines	57,220	1%	7,793	0%	6,571	0%	34,778	1%	31,684	0.8%	+ 24.1%
Vietnam	35,592	1%	39,533	1%	67,601	2%	86,097	2%	49,618	1.2%	- 11.7%
Congo	26,636	1%	36,276	1%	42,776	1%	47,476	1%	34,327	0.9%	+ 15.6%
Saudi Arabia	93,283	2%	159,672	4%	128,754	3%	138,371	3%	67,126	1.7%	- 36.4%
Ukraine	119,533	3%	102,729	3%	125,678	3%	106,334	3%	84,329	2.1%	+ 17.2%
Switzerland	179,202	5%	210,024	5%	221,569	6%	244,045	6%	185,707	4.7%	+ 21.2%
Mozambique	16,391	0%	20,457	1%	25,923	1%	30,828	1%	21,944	0.6%	+ 15.9%
<i>Other Destinations</i>	<i>1,094,168</i>	<i>28%</i>	<i>1,193,794</i>	<i>30%</i>	<i>1,264,279</i>	<i>32%</i>	<i>1,319,574</i>	<i>33%</i>	<i>869,507</i>	<i>21.9%</i>	
Extra-EU	3,972,355		4,736,325		4,746,274		4,956,762		3,511,004		
% change			+ 19%		+ 0%		+ 4%		+ 9.0%		

EU-27 poultry meat exports (by destination)

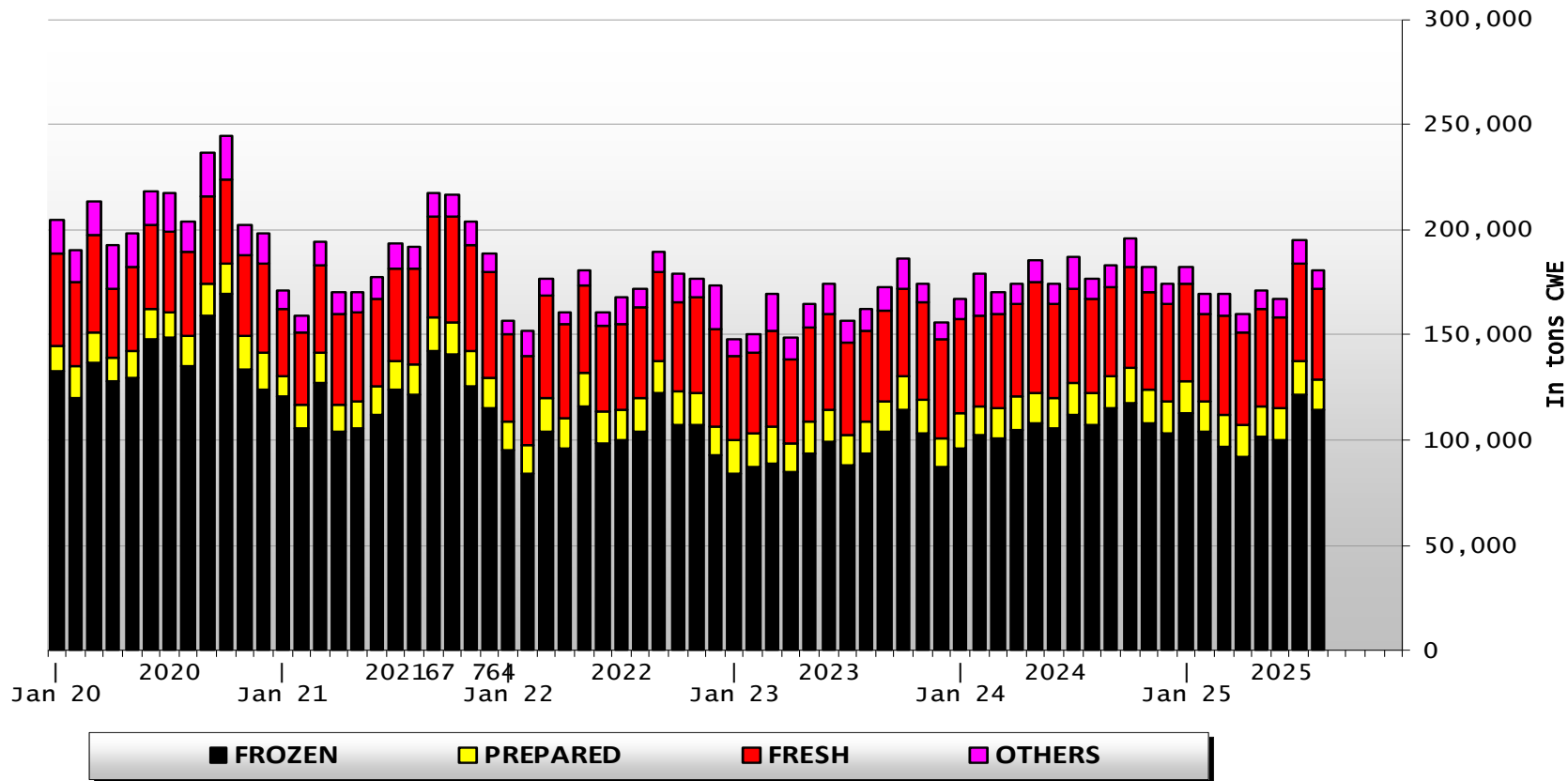
EU EXPORTS of Poultry Meat (TONNES cwe)



EU EXPORTS of Poultry Meat (Millions EUR)



Exports of selected Poultry products

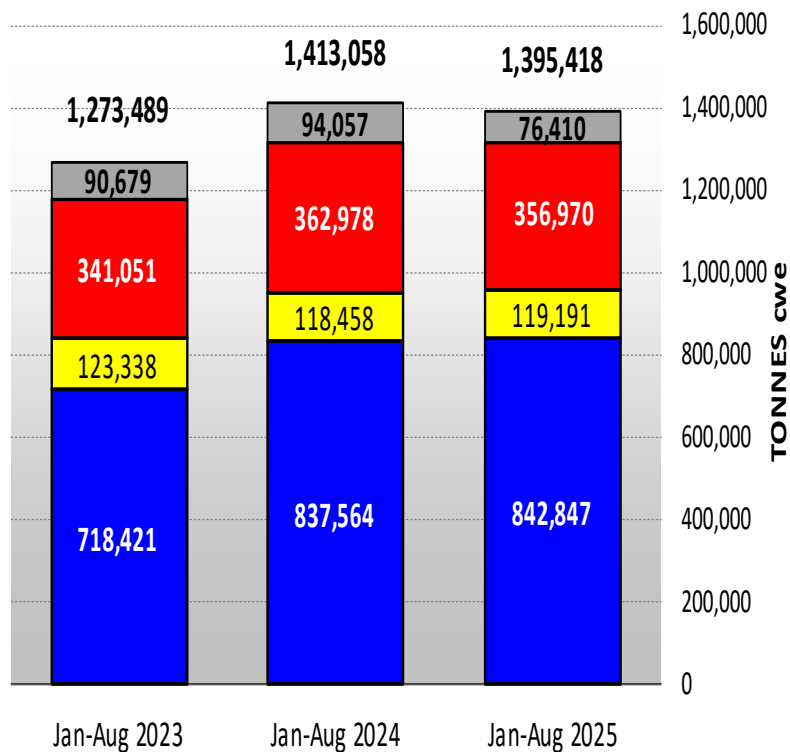


EU Market Situation for Poultry



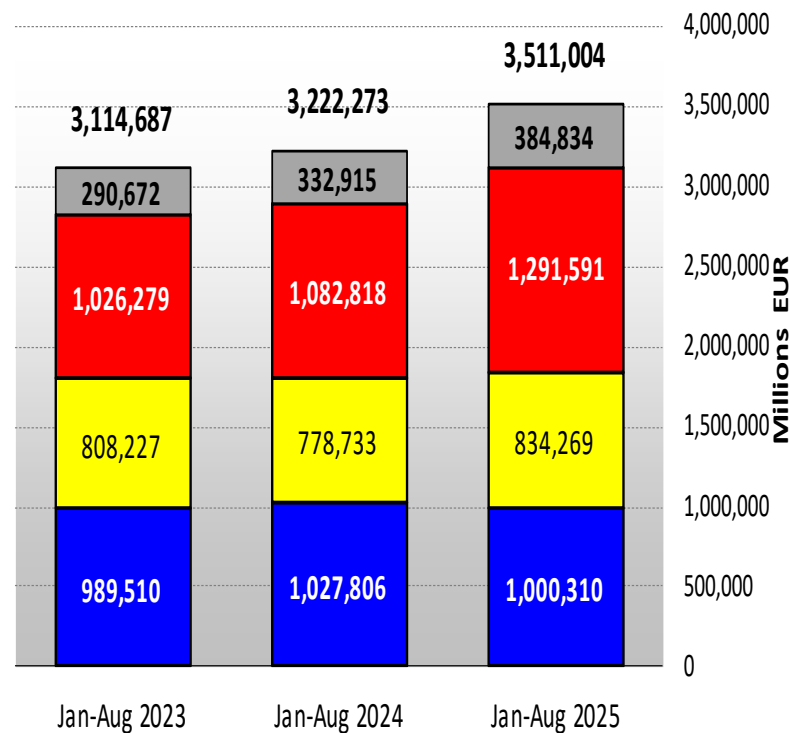
EU-27 poultry meat exports (by meat type)

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

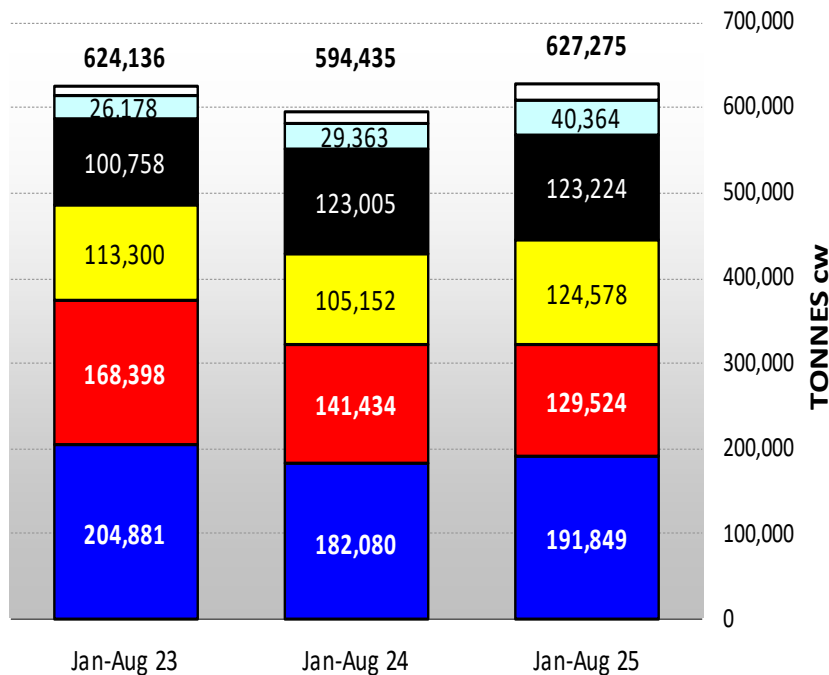
	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	
Brazil	251,887	32%	299,536	35%	288,723	32%	286,600	32%	191,849	30.6%	+ 5.4%
Ukraine	102,892	13%	160,697	19%	231,943	26%	194,484	22%	129,524	20.6%	- 8.4%
Thailand	130,658	16%	131,954	15%	148,696	17%	157,452	18%	124,578	19.9%	+ 18.5%
United Kingdom	274,667	34%	210,738	25%	171,160	19%	190,098	21%	123,224	19.6%	+ 0.2%
China	20,916	3%	32,864	4%	36,561	4%	45,188	5%	40,364	6.4%	+ 37.5%
Argentina	3,151	0%	4,096	0%	4,079	0%	6,711	1%	7,148	1.1%	+++
Bosnia-Herz.	1,608	0%	3,000	0%	2,889	0%	3,925	0%	2,292	0.4%	- 6.2%
<i>Other Destinations</i>	<i>11,279</i>	<i>1%</i>	<i>8,541</i>	<i>1%</i>	<i>10,504</i>	<i>1%</i>	<i>11,109</i>	<i>1%</i>	<i>8,296</i>	<i>1.3%</i>	
Extra-EU	797,056		851,427		894,555		895,567		627,275		
% change			+ 7%		+ 5%		+ 0%		+ 5.5%		

EU-27 Imports of poultry meat from selected origins

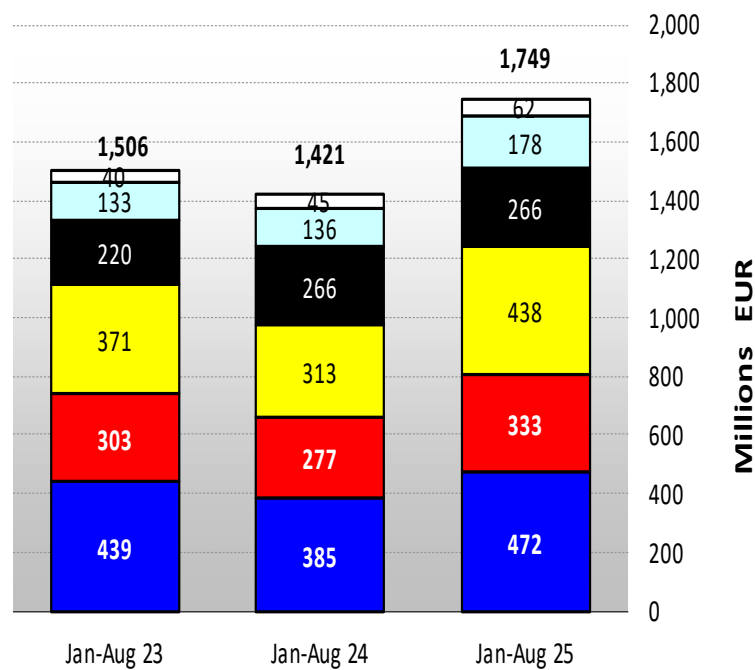
	2021		2022		2023		2024		Jan-Aug 25		Compared to Jan-Aug 24
	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	1000 euros	%	
Brazil	388,472	29%	669,772	31%	598,220	28%	624,042	29%	472,303	27.0%	+ 22.7%
Ukraine	166,208	12%	324,836	15%	418,539	20%	400,671	18%	332,654	19.0%	+ 20.3%
Thailand	317,487	24%	519,175	24%	490,197	23%	490,876	22%	438,023	25.0%	+ 39.9%
United Kingdom	327,273	24%	369,160	17%	353,613	17%	395,140	18%	265,778	15.2%	- 0.1%
China	95,081	7%	186,175	9%	183,071	9%	207,880	9%	178,463	10.2%	+ 31.6%
Argentina	6,508	0%	11,463	1%	11,360	1%	16,070	1%	15,233	0.9%	+ 81.8%
Bosnia-Herz.	10,345	1%	10,728	1%	9,362	0%	17,175	1%	7,779	0.4%	- 30.5%
Norway	7,914	1%	8,286	0%	8,888	0%	10,537	0%	14,412	0.8%	+++
Switzerland	5,300	0%	8,975	0%	6,730	0%	6,205	0%	5,673	0.3%	+ 29.2%
Moldova			13	0%			344	0%	2,806	0.2%	+++
<i>Other Destinations</i>	21,485	2%	20,473	1%	27,445	1%	20,601	1%	16,001	0.9%	
Extra-EU	1,346,074		2,129,057		2,107,425		2,189,541		1,749,125		
% change			+ 58%		- 1%		+ 4%		+ 23.1%		

EU27 poultry meat imports (by origin)

EU IMPORTS of Poultry Meat (TONNES cwe)

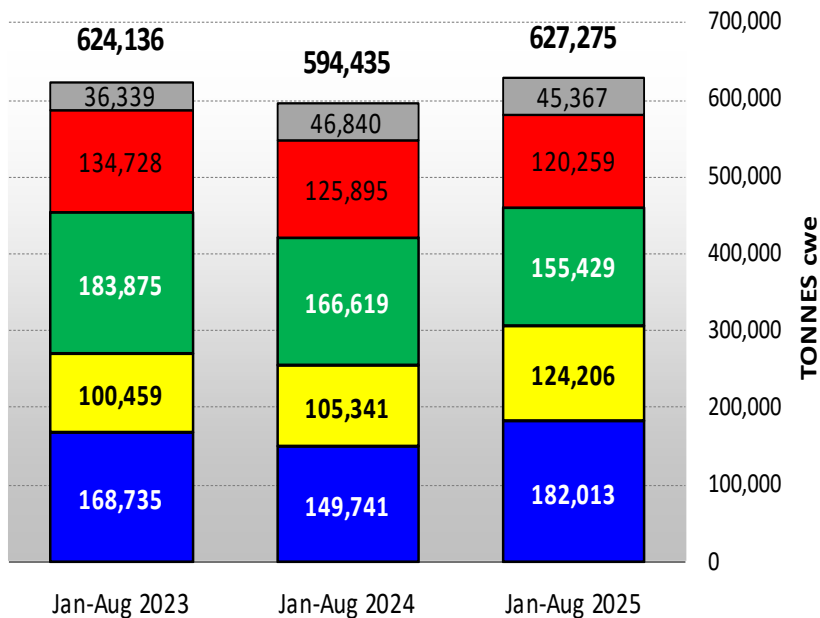


EU IMPORTS of Poultry Meat (Millions EUR)



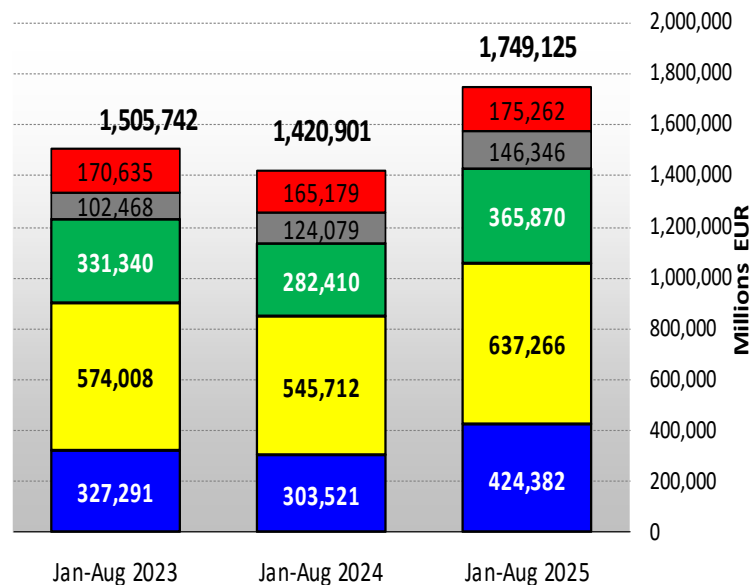
EU27 poultry meat imports (by meat type)

EU IMPORTS of Poultry Meat (TONNES cwe)

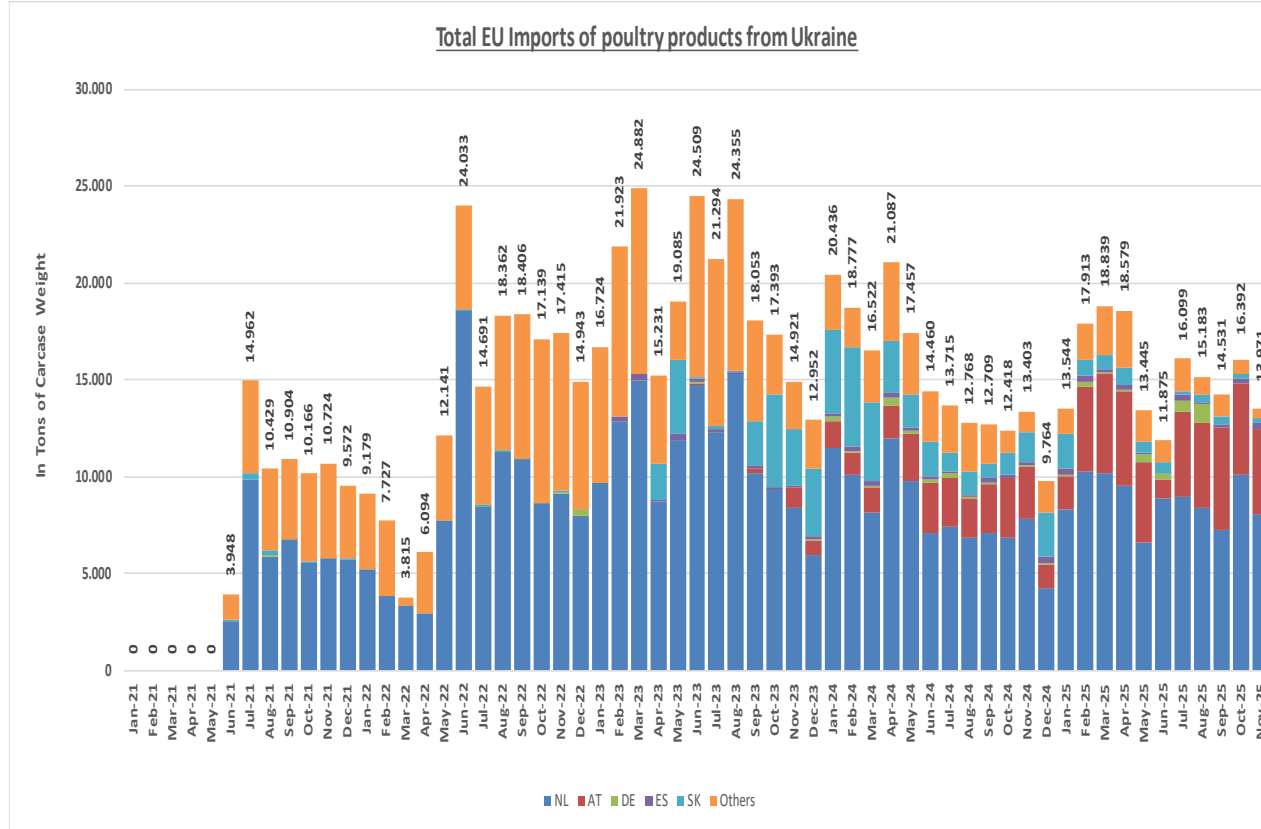


■ FROZEN ■ PREPARED ■ SALTED ■ FRESH ■ OTHERS

EU IMPORTS of Poultry Meat (Millions EUR)



■ FROZEN ■ PREPARED ■ SALTED ■ OTHERS ■ FRESH



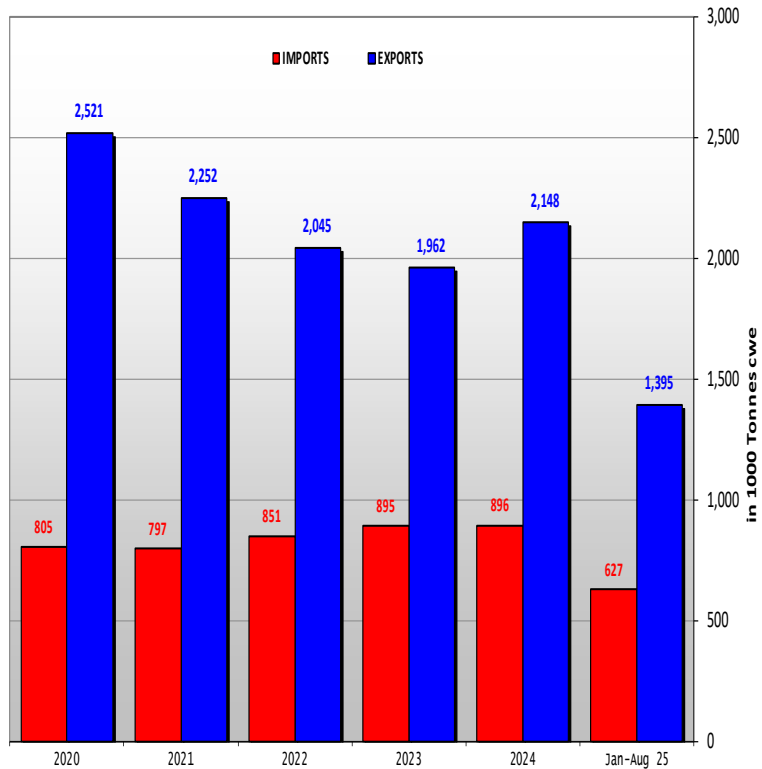
	2022	2023	2024	2025 (until 25 Nov)
Poultry EU total	163,944	231,323	183,516	168,663
NL	98,225	134,474	99,124	95,630
AT	0	2,186	24,530	44,057
SK	131	19,456	27,610	6,989
PL	38,127	26,862	4,943	5,037
DE	717	158	1,779	3,684
LT	3,455	4,282	4,439	2,598
ES	0	1,895	2,140	2,203
EL	112	769	3,103	2,017
IT	257	1,245	1,097	1,558
BG	23	67	1,470	1,171
CZ	527	971	3,357	1,089
CY	98	140	1,094	870
RO	1,627	3,947	7,655	695
PT	0	0	49	514
EE	1	88	320	350
HU	20,565	34,055	261	122
HR	0	0	0	29
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



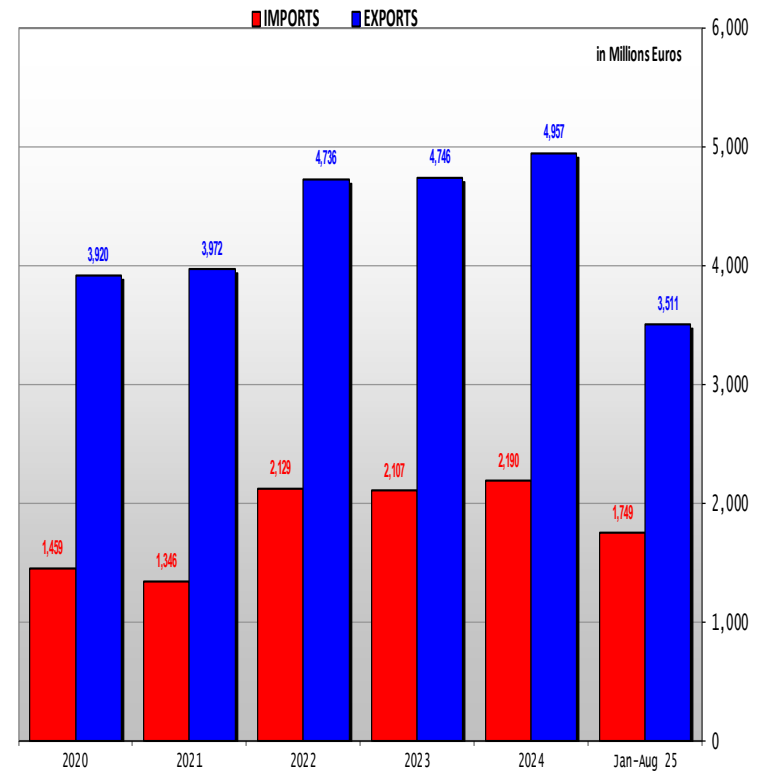
TRADE

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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