

4.4 Europe

4.4.1 Regional Demographics and Poultry Stocks

The European broiler industry has 6.4 million farms with 62,973 (1.1%) of those being commercial farms

and 5.63 million (98.9%) being household or micro-producer farms. European broiler farms have stocks of 2.3 billion chickens with 97.7% being on commercial farms and 2.3% being on household or micro-producer farms (Figure 119). The average size of commercial broiler farms is 36,405 head. The average size of the household or micro-producer farms is 10 head. There are 397,187 duck farms in Europe with an inventory of 74.99 million head. The average size duck farm is 189 head. There are 56,992 turkey farms in Europe with 102.9 million head of inventory. The average turkey farm has an inventory of 1,806 head.

Overall poultry stocks have increased in Europe since 2010. Chicken stocks are up 14.6%, duck stocks are down 12.5%, and turkey stocks are up 5.8%. In 2020, Europe had 2.35 billion chickens with 1.86 billion in commercial chicken meat farms and 1.84 billion on household farms. Duck stocks in Europe were 74.99 million head and turkey stocks were 102.9 million head. Total poultry stocks on European farms were 2.53 billion birds (Figure 120).

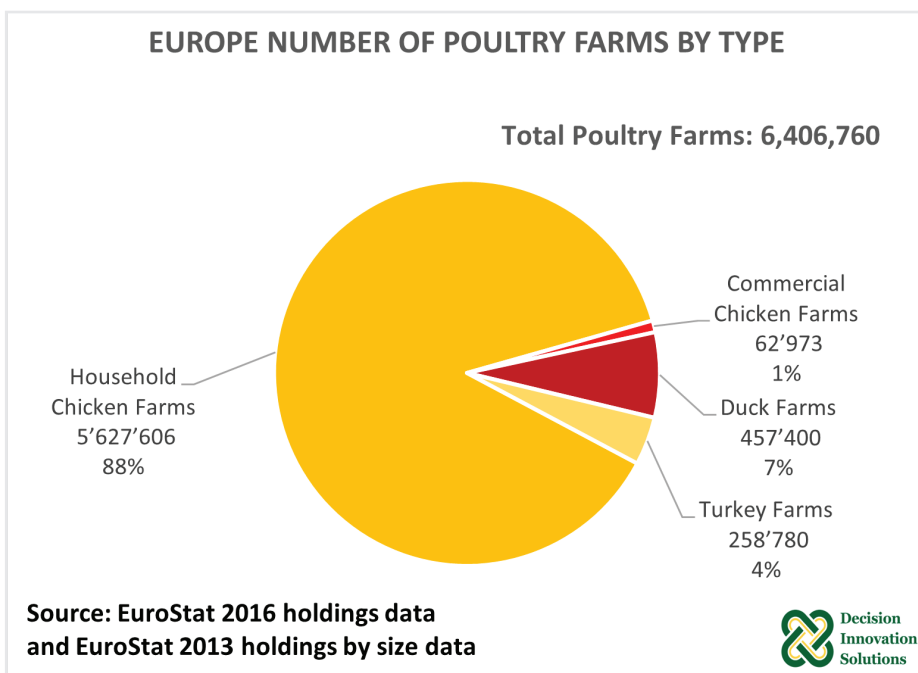


Figure 119. Europe number of poultry farms by type

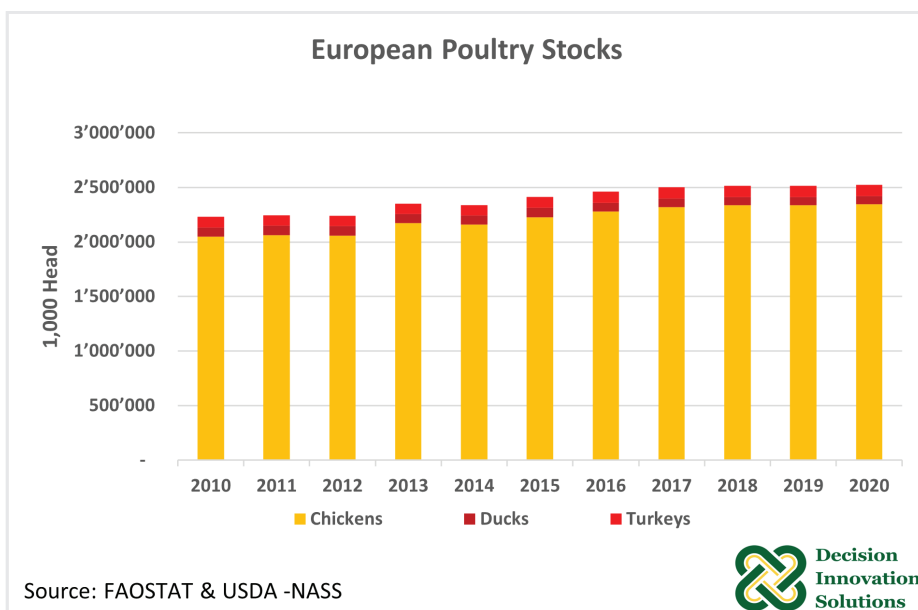


Figure 120. Europe poultry stocks

4.4.2 Regional Economics

In 2020, the value of European GDP was nearly \$22.0 trillion. The agricultural production sector contributed 2% of the total GDP. Crop production in Europe was valued at \$294.6 billion. Red meat production was valued at \$209.6 billion. Poultry production was less than 1% of the total GDP (Figure 121).

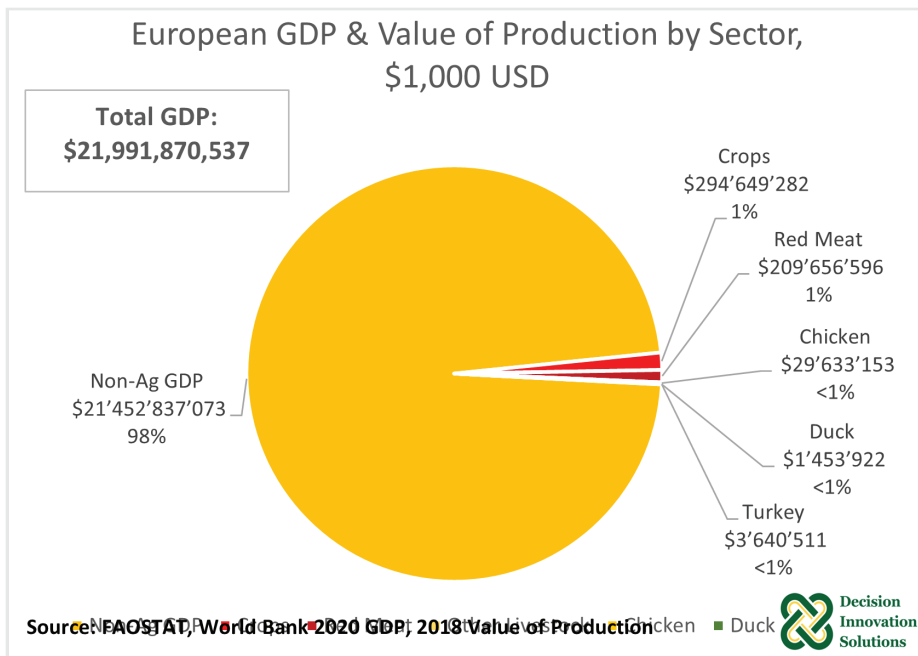


Figure 121. Europe GDP & value of production by sector

4.4.3 Regional Production Volume and Value

Europe produced 22.3 million metric tons of poultry meat in 2020 with 88% being chicken meat, 2% being duck meat, and 10% being turkey meat (Figure 122).

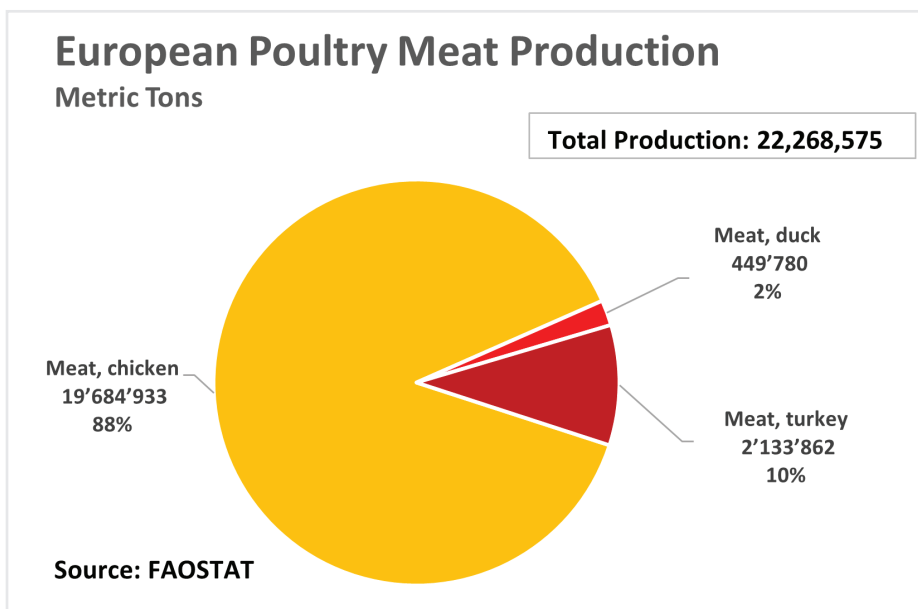


Figure 122. Europe poultry meat production

European poultry production has increased 12.3% since 2010. European poultry production in 2020 was valued at \$34.7 billion with 85% due to chicken production, 11% due to turkey production and 4% due to duck production (Figure 123).

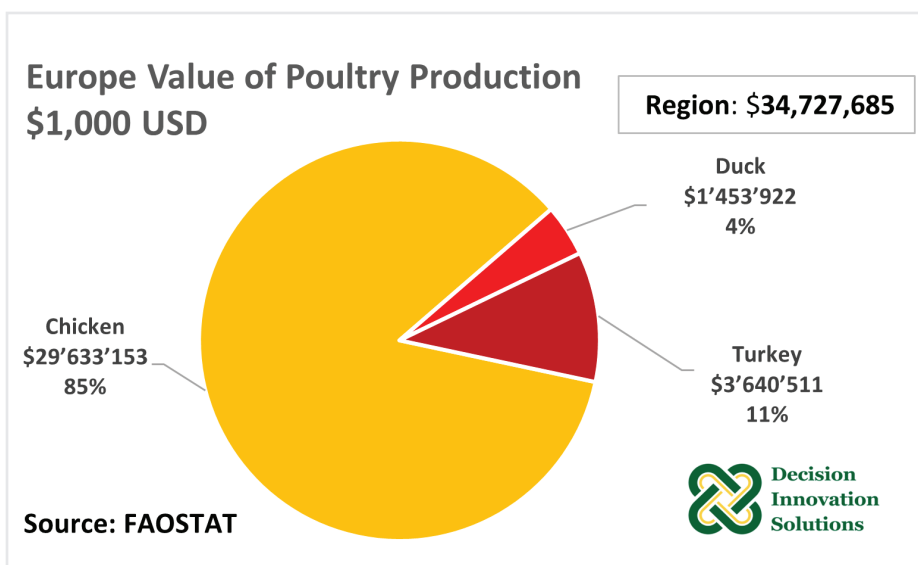


Figure 123. Europe value of poultry production

4.4.4 Regional Cost of Production

Within the European region, the share of feed relative to total broiler production cost ranged from 59% in the United Kingdom to 65% in Poland in 2017 (Figure 124). Overall, the cost of day-old chicks was the second largest component in the broiler production cost in Europe, which averaged 18% across these countries. In the United Kingdom the share of day-old chicks (22%) was the highest among the other European countries, followed by France with a share of 19% of total cost.

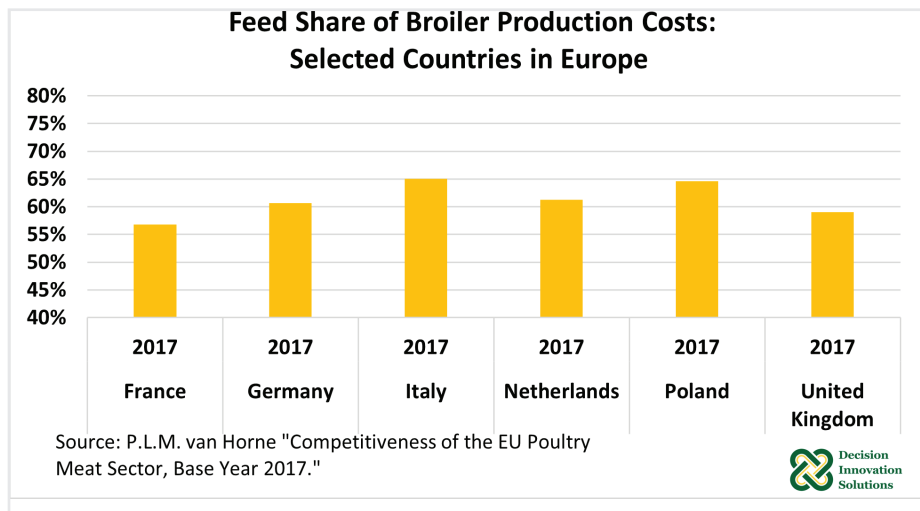


Figure 124. Feed share of broiler production costs: Europe

France had the highest other variable costs, which includes heating, electricity, and animal health at 10% of total costs, while the United Kingdom had the lowest other variable costs relative to total cost at 8%. For the Netherlands, Germany, Italy, and Poland other variable costs accounted for 9% of total cost of broiler production. Some countries such as the Netherlands and Germany, incur in manure disposal expenses. However, other countries such as the United Kingdom and Poland, manure disposal represents a small source of income.