

## 4.4.6 Germany

### 4.4.6.1 Demographics

In Germany, the number of poultry farms totaled 9,040 with the 4,260 duck farms representing the largest share of poultry farms at 47% (Figure 133). Approximately, 24% of the total poultry farms, or 2,116 farms were household chicken farms. The 1,730 turkey farms accounted for 19% of Germany's poultry farms and the 934 commercial chicken farms accounted for 10% of Germany's poultry farms.

The average commercial chicken farm had 171,180 chickens. The average turkey farm had 9,148 head. The average size of the household or micro-producer farm was 71 head. The average size duck farm was 1,019 head.

Poultry production and consumption are both rising in Germany. Poultry production in 2019 totaled 1.5 million metric tons. Poultry consumption in 2019 was 1.5 million metric tons. Poultry production increased 12% since 2010. Consumption of poultry in Germany increased 11% (Figure 134).

In Germany, poultry stocks included 160 million chickens, 15.8 million turkeys, and 4.3 million ducks (Table 37). Poultry slaughter totaled 670.1 million head.

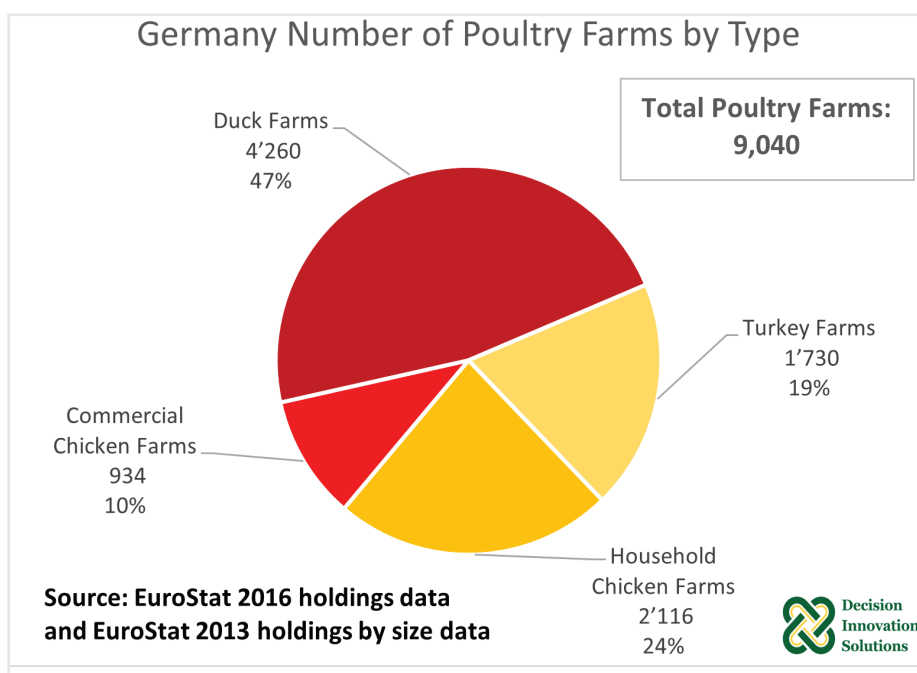


Figure 133. Germany number of poultry farms by type

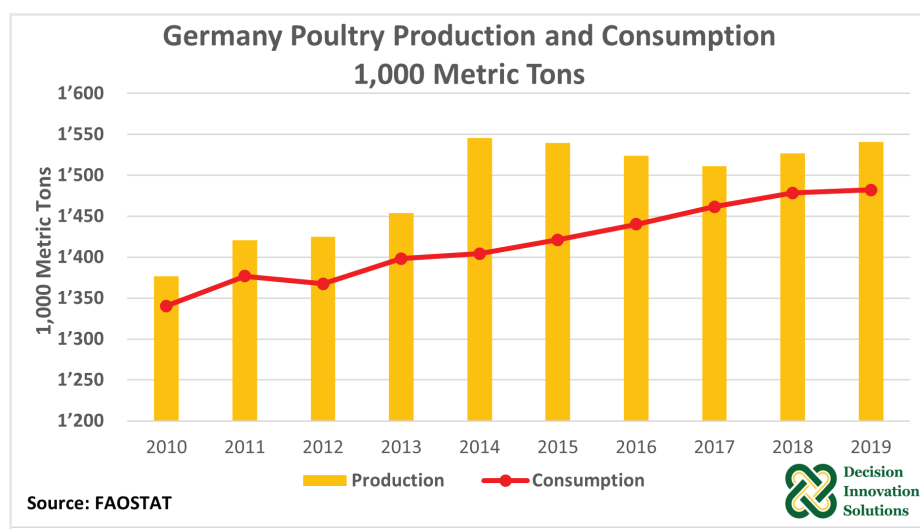


Figure 134. Germany poultry production & consumption

GERMANY POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	114'523		31'985	146'508
Producing Animals/Slaughtered	291'985		5'912	297'897
Production (1,000 MT)	696		71	767

Sources: FAO, 2020

Table 37. Germany poultry stocks, slaughter & production

Chicken slaughter was estimated at 623.2 million head. Turkey slaughter was an estimated 34.9 million head. Germany's chicken slaughter increased from 2010 to 2020 by 1%. Duck and turkey slaughter decreased 55% and 9%, respectively. Poultry production included nearly 1.1 million metric tons of chicken, 476,000 metric tons of turkey, and 27,000 metric tons of duck. Since 2010, chicken production increased 27%, duck production declined 57%, and turkey production declined 1%.

#### 4.4.6.2 GDP and Value of Production

In 2020, the value of GDP in Germany was an estimated \$3.8 trillion. The non-agricultural sector represented approximately 99% of the total GDP. The agricultural production sector was dominated by red meat production. About \$27.5 billion was derived from red meat production. Crop production was the second largest share of agricultural production with \$18.6 billion. An estimated \$1.4 billion was derived from chicken production. Turkey production represented \$830.5 million. The smallest share of agricultural production was duck production with approximately \$233.5 million in contributions.

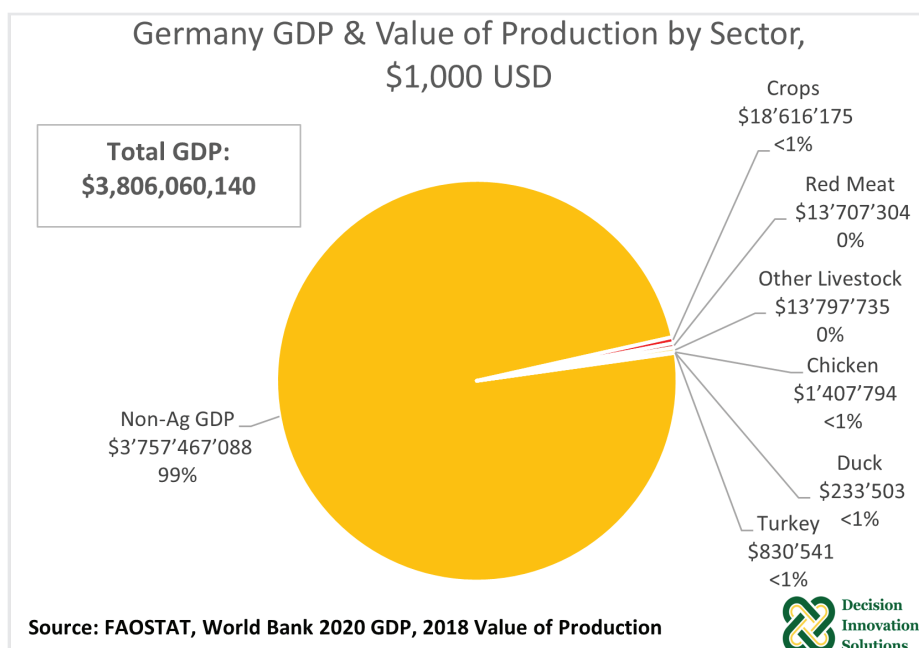


Figure 135. Germany GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Germany are estimated to be \$110.8 billion. Of this amount, \$6.2 billion comes from the poultry industry, with \$3.5 billion from chicken meat production, \$582 million from duck production, and \$2.1 billion from turkey production. Agriculture pays a net value of \$1.8 billion in taxes, \$95.5 million of which is estimated to be from the poultry industry.

ECONOMIC EFFECTS - GERMANY (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$160'000	\$4'341	\$ 15'826	\$180'167
Livestock	\$623'161	\$12'072	\$34'901	\$670'134
Poultry	\$ 1'066	\$ 27	\$ 476	\$ 1'569
Chicken	\$160'000	\$4'341	\$ 15'826	\$180'167
Duck	\$623'161	\$12'072	\$34'901	\$670'134
Turkey	\$ 1'066	\$ 27	\$ 476	\$ 1'569

Source: FAOSTAT, OECD Input-Output Tables. \*Taxes is equal to total taxes net of subsidies

Table 38. Economic effects - Germany

#### 4.4.6.3 Labor

According to data from the World Bank, 44.1 million people comprised the labor force in Germany during 2020 (Table 39). Of that total, 43.6 million people worked in non-agricultural labor sectors. Approximately, 534,549 people were in employed in agricultural sectors.

Among those in agriculture, 27,080 people were employed in poultry production.

The total number of meat processing jobs in Germany was 218,275 during 2020. Wages earned in meat processing totaled \$5.7 billion. Livestock meat processing accounted for 184,927 jobs and \$4.8 billion in wages earned. Poultry processing accounted for 33,348 jobs and \$869.5 million in wages earned.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - GERMANY			
	Total	Female	Male
Total Country Labor	44'120'268	20'728'495	23'391'773
Non-Agricultural Labor	43'585'719	20'560'272	23'025'447
Agricultural Labor	534'549	168'223	366'326
Total Non-Poultry Agricultural Labor	507'468		
Total Poultry Labor	27'080		
Chicken Labor	15'423		
Turkey Labor	9'099		
Other Poultry Labor	2'558		
Wages (\$1,000 USD)			
Total Meat Processing Labor	218'275	\$5'690'899	
Livestock Processing Labor	184'927	\$4'821'448	
Poultry Processing Labor	33'348	\$869'452	

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 39. Agricultural labor force characteristics - Germany

#### 4.4.6.4 Cost of Production

After feed cost (61%), which was the largest proportion of broiler production cost in Germany in 2017, day-old chick cost was the second largest share in the production cost at 17%. Over one fifth of total cost was distributed among variable costs (9%), housing (7%) and labor (5%). General costs relate to the costs at farm level for insurance, bookkeeping, consultancy, telephone, and transport was 1%. Germany also had the added cost of 1% related to manure disposal.

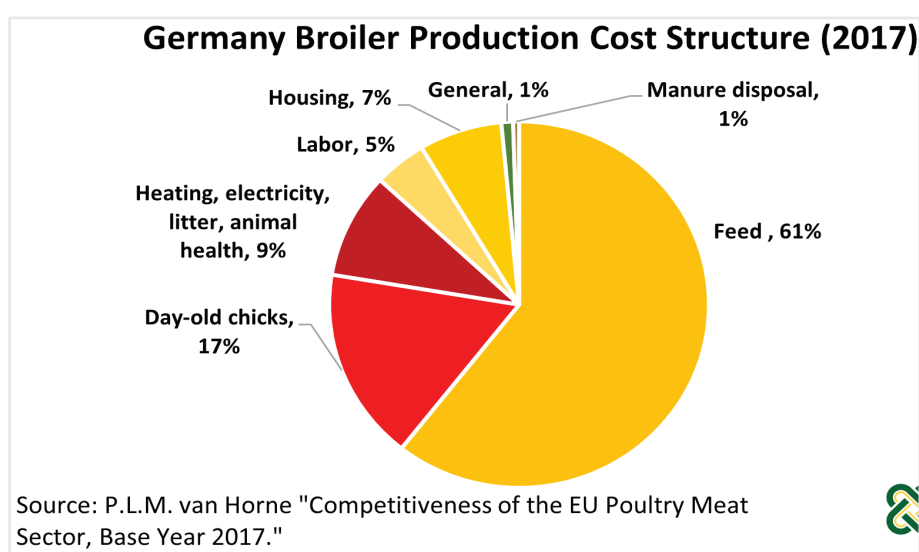


Figure 137. Germany broiler production cost structure

#### 4.4.6.5 Trade

The three largest destinations for Germany's poultry meat exports were the Netherlands (\$330.8 million), France (\$270.5), and the United Kingdom (\$220.1) in 2020. The top ten markets for Germany's poultry meat exports were located in Europe (see Figure 137 and Figure 138). Overall, Germany exported poultry meat to 116 countries in 2020.

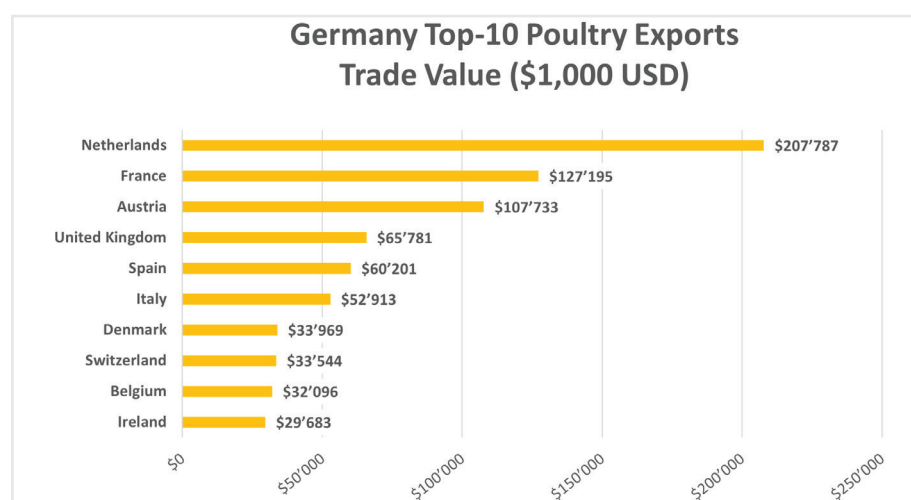


Figure 136. Germany top 10 poultry exports, trade value

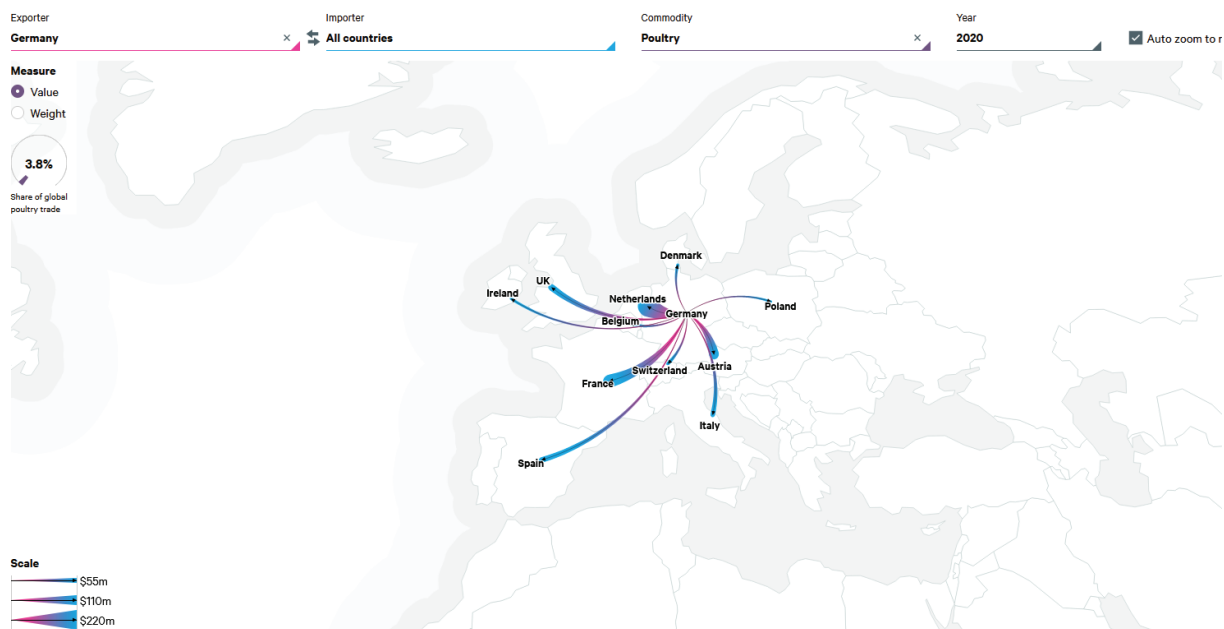
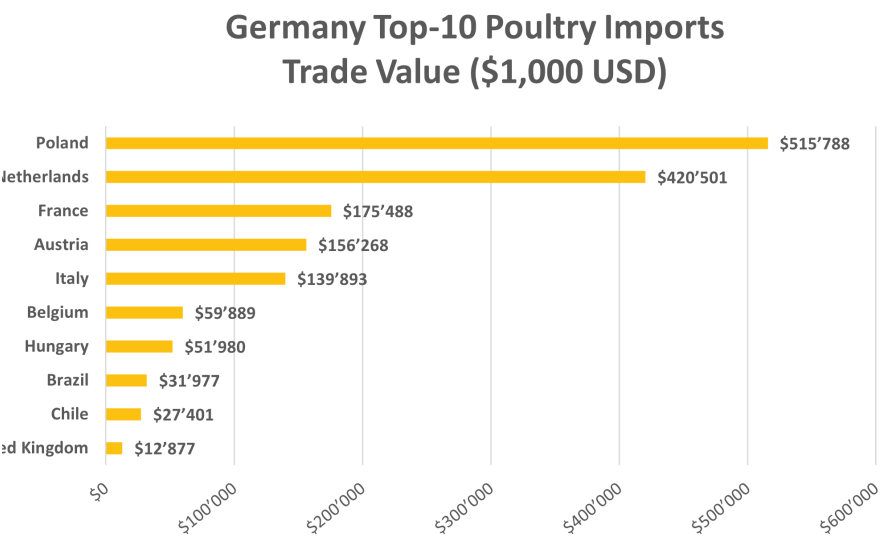


Figure 138. Germany poultry export flows



26% (\$550.3 million) of the value of poultry meat imported by Germany was shipped from Poland. Four other countries supplied over \$1.1 billion worth of poultry meat to Germany in 2020: The Netherlands, Austria, France, and Italy (see Figure 139 and Figure 140).

Figure 139. Germany top 10 poultry imports, trade value

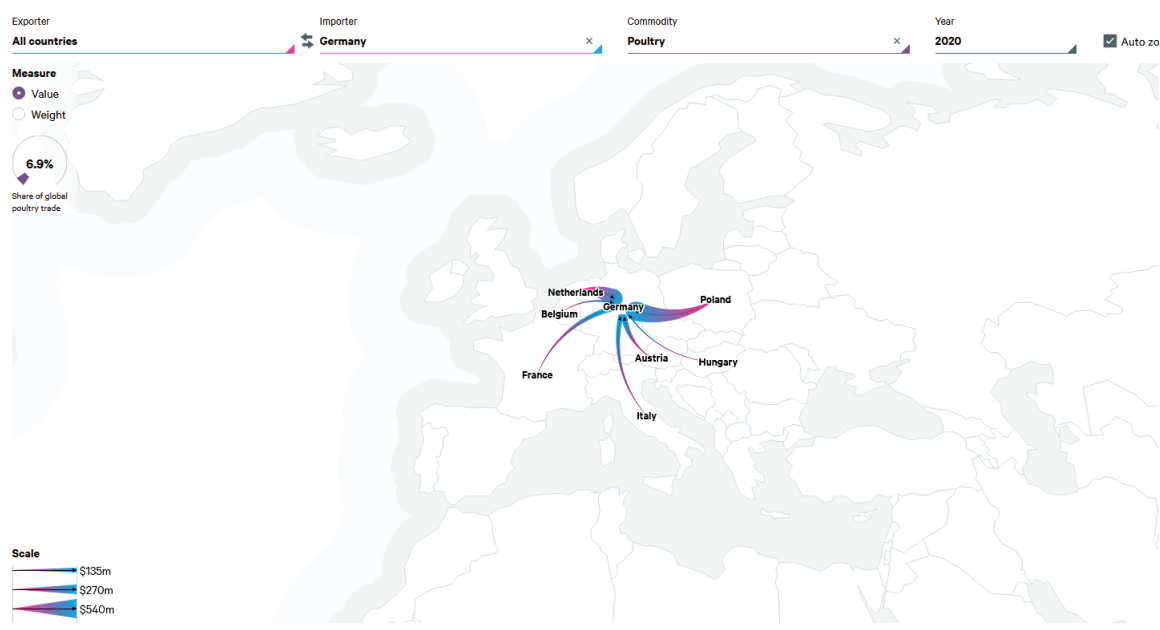


Figure 140. Germany poultry import flows