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## Poland

**Post:** Warsaw

### **Poland maintains its leading position in the EU.**

**Report Categories:**

Poultry and Products

**Approved By:**

Russ Nicely, Agricultural Attaché

**Prepared By:**

Piotr Rucinski, Agricultural Specialist

**Report Highlights:**

Poland remains the major producers of poultry meat in the European Union. It is estimated that in 2016 poultry production will increase by an additional 15 percent in comparison to 2015. Higher output of poultry meat is stimulated by growing domestic consumption and export demand. Although the majority of poultry meat exports are directed to the internal EU market the industry and the Polish government are trying to open new markets including obtaining eligibility to export to the United States. It is expected that due to reduction of prices for poultry meat on the domestic market and declining export demand, production of poultry meat in the first half of 2017 will be five percent higher than in the same period of 2016.

**General Information:**

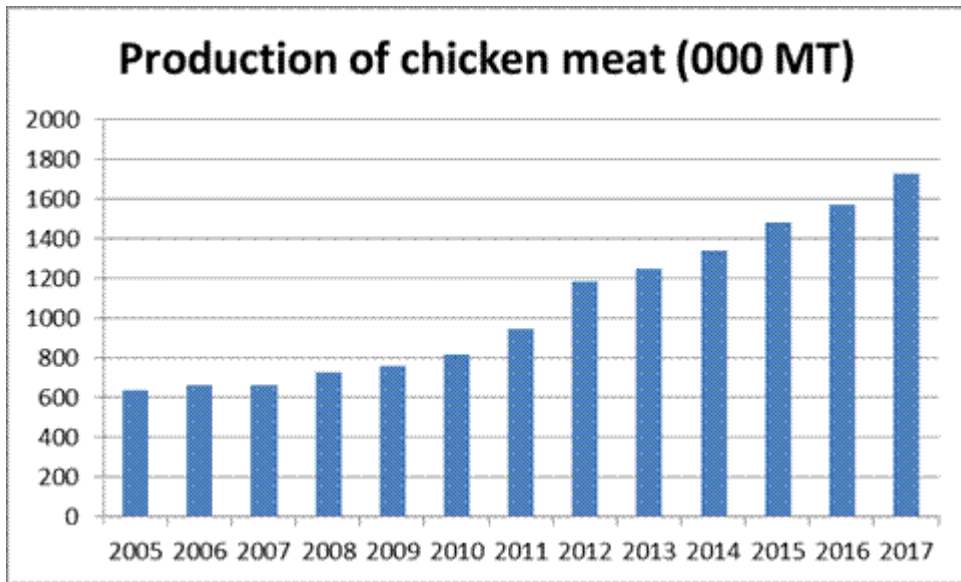
## **I. Poultry Meat**

### **Production**

In 2015 Polish poultry production amounted to 2,386,000 MT and was 7 percent higher than in the previous year. The increase of production stems from growing domestic consumption, as consumers substitute beef with poultry which is perceived as healthier and cheaper meat, and increasing exports mainly to other EU member states. Poultry meat production consists mainly of chicken broilers (81%), turkey broilers (14%) which are in demand for the domestic meat processing industry, and ducks and geese which are mainly exported to Western Europe, mainly Germany. A low level of prices for compound feeds and continuing export demand for exports are expected to stimulate poultry meat production in 2016. It is estimated that in 2016 poultry production will increase by additional 15 percent in comparison to 2015. However, it is forecast that due to the reduction of prices for poultry meat on the domestic market and declining export demand production for poultry meat in the first half of 2017 will slow down to seven percent compared to the same period of 2016. Poultry meat production is based on locally produced grains (mainly corn) and 2 million tons of soybean meal imported mainly from South America or the United States.

### **Consumption**

It is estimated that in 2016 annual consumption of poultry meat will amount to 28.5 kilograms per capita, almost five percent higher than in 2015. Poultry meat remains the cheapest meat on Polish market, which stimulates consumption. Since 2013 there is a trend of decrease of retail prices for poultry meat. In 2015 retail prices for poultry meat declined by four percent in comparison to 2014. In the first eight months of 2016 retail prices for poultry meat decreased by additional 1.6 percent in comparison to the same period of 2015. Although pork remains the most preferred meat for Polish consumers with annual per capita consumption at 40 kilograms, poultry meat is perceived as a healthy and cheap alternative for consumers. In addition, the Polish meat processing industry specialized in production of poultry sausages and pates which imitate pork products. It is forecast that in 2017 poultry consumption will increase by an additional two percent because of higher production and a decrease in retail prices. Poultry meat constitutes 38 percent of total meat consumption in Poland compared to 55 percent for pork and only two percent for beef. It is estimated that consumption of poultry from backyard production amounts to 6.5 percent of total poultry meat production.



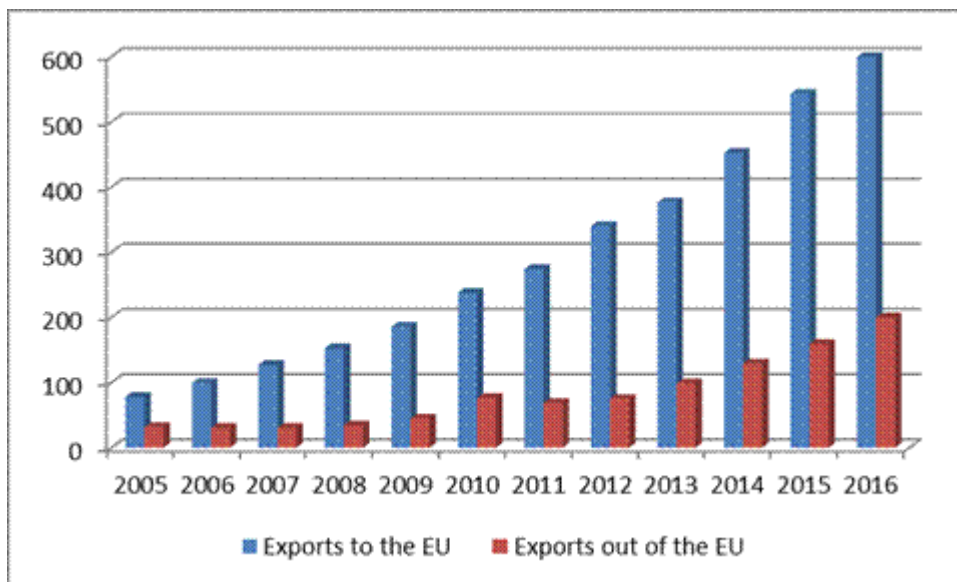
2016 – FAS Warsaw estimate  
 2017 – FAS Warsaw forecast

## Trade

In 2015 export of poultry meat amounted to 698,970 MT and was 20 percent higher than in 2014. However, in 2015 the value of Polish exports of poultry meat amounted to U.S. \$1.3 billion and was almost the same as in 2014, reflecting a drop of export prices in 2015. It is estimated that in 2015 some 30 percent of Poland’s poultry meat production was destined for export. It is expected that exports will grow in 2016 because of continued demand from the EU and Asian markets. The major export destinations of Polish poultry meat within the EU are the UK, France, Germany, the Netherlands and Czech Republic. Outside of the EU Poland exports poultry meat to Hong Kong, China and Congo. The Polish poultry meat industry is highly integrated and export oriented. Although the majority of exports are directed to the internal EU market, the industry and Polish government are trying to open new markets including obtaining eligibility to export to the United States.

Imports of poultry meat are stable and consist mainly of chicken and turkey cuts imported from Germany, the UK and Hungary. In 2015 the value of imports of poultry meat amounted to U.S.\$ 76 million, a two percent increase in comparison to 2014 because of higher imports of frozen chicken cuts and edible offal from Slovakia.

## Exports of Chicken Meat (000 MT)



2016 – FAS Warsaw estimate

## I. Eggs and Egg Products

### Production

In 2015 production of eggs in Poland amounted to 590,000 MT and was 0.7 percent higher than in 2014. Increase of production was stimulated by cheap feed and higher export. It is estimated that in 2016 production of eggs will increase by another two percent, mainly due to low prices of feed and growing export demand.

### Trade

In 2015, export of eggs in Poland increased by 14 percent mainly because of higher exports to Germany and Czech Republic. Germany, the Netherlands and Italy remain the main outlets for Polish table eggs, while Germany, the Czech Republic, the Netherlands, and Denmark were the main outlet for processed eggs. In the first eight months of 2016 Polish exports of table eggs were eight percent higher than in the same period of 2015, because of growing sales to Germany.

**End of Report.**

