THE MARKET OF POULTRY MEAT IN THE EUROPEAN UNION

Monica-Ionela PANDELEA[1], Elena GÎNDU[2], A. CHIRAN[2], Valeria RALEA[3]

[1]S.C. "AVI-TOP" S.A. Iaşi
e-mail: monicapandelea@yahoo.com

[2]University of Agricultural Sciences and Veterinary Medicine of Iaşi

[3]Şcoala generală "Ion Ghica" Iaşi

The poultry meat occupies an important place in the structure of the European meat consumption (for example, if the consumption has been 23,2 Kg/inhabitant in 2007, the specialists foresee to reach 24,5 Kg/inhabitant in 2014).

During the last five years, the evolution of the total poultry meat production in the European Union presented an ascendant tendency. Currently, the France, Great Britain, Spain, Italy, Poland, Holland are the primary poultry producers.

In addition, the biggest predominance of imports has been performed from Brazil, Holland, Belgium, Hungary, Germany and Austria. In the period 2004-2008, the European Union imports of poultry meat came from Brazil, Thailand and Chile in a proportion of 95 %. Poultry meat trade had an obvious increase at the level of the European Union, afterwards in the period 2003-2008, exports decreased with almost ¼ (in the year 2008, as compared to 2002) and imports increased with 23,5 %.

Poultry meat exports from the European Union addressed to Russia, Ukraine, Saudi Arabia, Benin, Hong Kong, Vietnam etc.

In the European Union, the poultry meat prices had an increasing evolution in the year 2009, comparing to the year 2007.

The price policy adopted this year by producers will influence the evolution of the poultry meat market in 2009. As the costs of production will have a significant increase, the specialists count on the fact that imports will decrease because of the international economic situation and the rate of exchange that will create more space on the internal market of local producers.

According to the main players in the field, the poultry meat market will have an ascendant tendency and will register an increase of 10 % at least, in spite of the present climate of economic recession.

Key words: *European Union, market, poultry meat*

In The European Union, poultry breeding belongs to a system of durable agricultural production and represents a viable choice that puts on the first place the consumer health.

In the European Union, a poultry breeding of higher performance is encouraged through investments in primary production, processing and products trade. The produced aliments within modern and integrated poultry breeding have been always more expensive than those produced in the conventional mode.

Despite this, in the last years, more consumers accept a bigger price in return for the quality warranty and safety of food that they want to consume. Performing a durable and efficient poultry breeding is closely related to integrated agriculture, which main objective is to manage big productivity farms in a durable way, through a superior use of systems of plant cultures, animal and poultry breeding and fattening, processing and trade of finished products.

The poultry meat market develops in the direction of quality products, which accent is made on the novelty and the product benefit for consumers. We observe a market maturing where competition determines the most important producers to search new development ways.

The main producers on market are concerned to diversify the production, either through extension of existing brands or by introducing of new ones.

MATERIAL AND METHOD

The authors performed the study based on the bibliographical sources and aimed at the European Union poultry meat market. In view to emphasize the main aspects of the EU poultry meat market, they deal with the following aspects: poultry meat total production, distribution of meat production on countries, import, export, prices etc.

REZULTS AND DISCUSSIONS

The European Union poultry meat total production had an increasing evolution during the period 1994-2009 *(fig. 1)*.

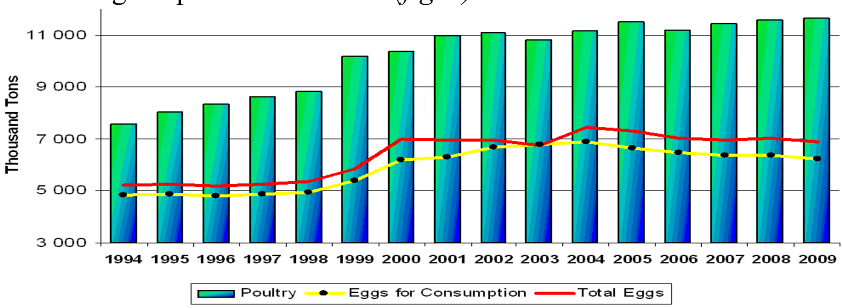

Figure 1 **European Union poultry meat production forecast in 2009, as compared to the period 1994-2008 (thousand tons)**

Under structural aspect, the France, Great Britain, Spain, Italy, Poland and Holland are **the primary poultry producers** *(fig. 2)*.

Poultry meat trade had an obvious increase at the level of the European Union, afterwards in the period 2003-2008, exports decreased with almost ¼ (in the year 2008, as compared to 2002) and imports increased with 23,5 % *(fig. 4)*.

Poultry meat exports from the European Union addressed to Russia, Ukraine, Saudi Arabia, Benin, Hong Kong, Vietnam etc. *(tab. 1, fig. 5)*.

In the period 2004-2008, the European Union imports of poultry meat came from Brazil, Thailand and Chile in a proportion of 95 % *(tab. 2, fig .6.)*.

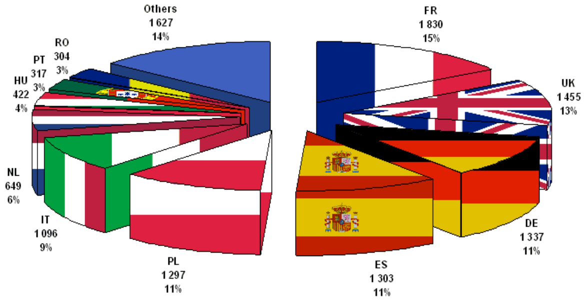

Figure 2 **Experts forecast concerning distribution of poultry meat production on primary EU countries producers, in 2009 (thousand tons and %)**

Evolution of poultry meat production was positive in EU countries, during the period 2006-2009 *(fig. 3)*.

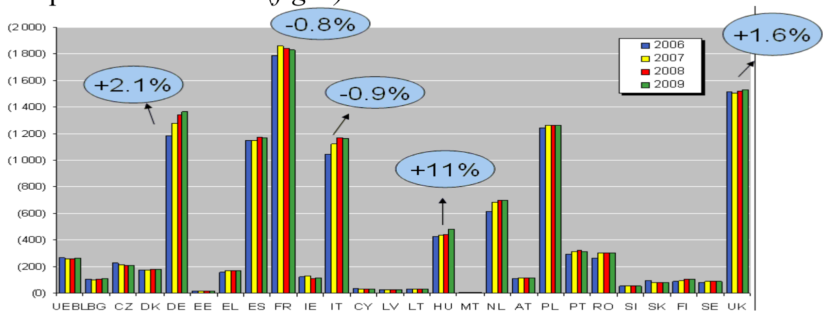

Figure 3 **Forecast concerning evolution of poultry meat production on primary EU countries producers, in 2009, as compared to the period 2006-2008 (thousand tons)**

According to the main players in the field, the poultry meat market will have an ascendant tendency and will register an increase of 10 % at least, in spite of the present climate of economic recession.

In the European Union, the poultry meat prices had an increasing evolution in the year 2009, comparing to the year 2007 **[EUROSTAT Statistics Database]** *(fig. 7)*.

The price policy adopted this year by producers will influence the evolution of the poultry meat market in 2009. As the costs of production will have a significant increase, the specialists count on the fact that imports will decrease because of international economic situation and rate of exchange that will create more space on the internal market of local producers.

Besides, local producers foresee a decrease of imports in 2009. The strategy of the main players on market aims at enlarging exports.

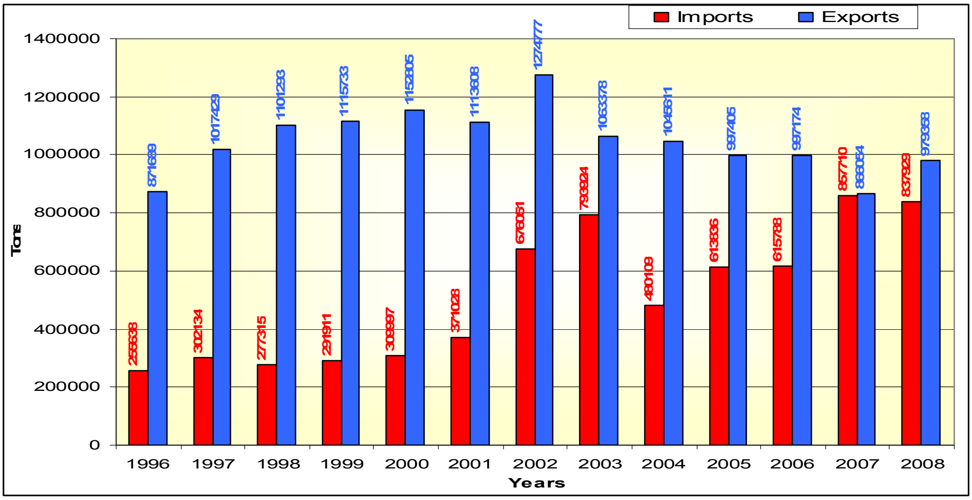

Figure 4 **Evolution of European Union trade of poultry meat within European market, during the period 1996-2008**

Table 1

Exports of poultry meat from the European Union, on primary destinations

	2004		2005		2006		2007		Jan-Dec 08	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Russia	206 771	19.8%	261 377	26.2%	257 572	25.8%	244 377	28.2%	229 705	23.5%
Ukraine	127 932	12.2%	70 095	7.0%	80 963	8.1%	28 391	3.3%	112 736	11.5%
Saudi Arabia	84 161	8.0%	94 306	9.5%	76 894	7.7%	79 369	9.2%	95 132	9.7%
Benin	50 418	4.8%	47 991	4.8%	47 427	4.8%	64 436	7.4%	83 117	8.5%
Hong Kong	30 706	2.9%	41 347	4.1%	62 605	6.3%	64 705	7.5%	58 673	6.0%
Vietnam	168	0.0%	334	0.0%	2 398	0.2%	16 144	1.9%	39 415	4.0%
Ghana	20 624	2.0%	24 481	2.5%	30 337	3.0%	29 331	3.4%	31 497	3.2%
Switzerland	30 013	2.9%	29 226	2.9%	23 646	2.4%	27 494	3.2%	28 173	2.9%
U.A.Emirates	22 301	2.1%	24 255	2.4%	20 130	2.0%	17 455	2.0%	25 493	2.6%
Yemen	39 769	3.8%	35 215	3.5%	16 490	1.7%	26 795	3.1%	26 673	2.7%
Congo (Dem. Rep.)	18 711	1.8%	26 303	2.6%	25 952	2.6%	23 845	2.8%	20 564	2.1%
Malaysia	16 896	1.6%	17 236	1.7%	20 395	2.0%	26 300	3.0%	17 864	1.8%
EXTRA EU15-25-27	1 045 611		997 405		997 174		866 054		979 358	
% change			- 5%		- 0%		- 13%		+ 13.1%	

Source: EUROSTAT Statistics Database

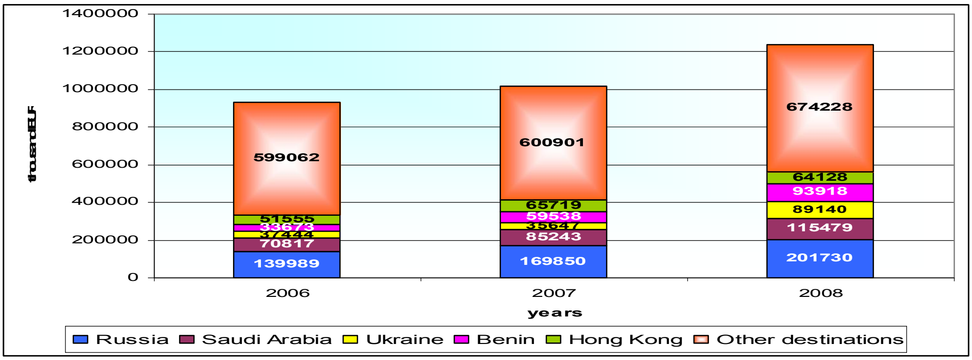

Figure 5 **Exports of poultry meat from the European Union, on primary destinations [EUROSTAT Statistics Database]**

Table 2

European Union imports of poultry meat, during the period 2004-2008 (tons)

	2004		2005		2006		2007		Jan-Dec 08	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Brazil	325 749	67.8%	456 872	74.4%	451 716	73.4%	671 889	78.3%	627 386	74.9%
Thailand	91 522	19.1%	92 751	15.1%	110 766	18.0%	129 447	15.1%	146 138	17.4%
Chile	19 956	4.2%	21 242	3.5%	18 272	3.0%	16 923	2.0%	34 549	4.1%
Argentina	11 685	2.4%	16 733	2.7%	15 023	2.4%	25 855	3.0%	20 260	2.4%
Israel	4 834	1.0%	6 180	1.0%	4 469	0.7%	9 078	1.1%	6 247	0.7%
Croatia	1 924	0.4%	1 677	0.3%	1 749	0.3%	1 682	0.2%	1 884	0.2%
USA	122	0.0%	98	0.0%	59	0.0%	240	0.0%	393	0.0%
Uruguay	72	0.0%	34	0.0%	162	0.0%	230	0.0%	109	0.0%
EXTRA EU15-25-27	480 109		613 836		615 788		857 710		837 929	
% change			+ 28%		+ 0%		+ 39%		- 2.3%	

Source: EUROSTAT Statistics Database

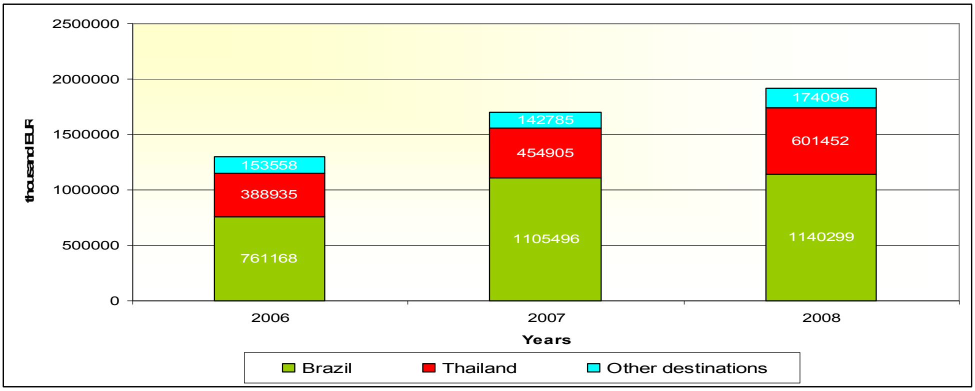

Figure 6 **European Union imports of poultry meat, during the period 2006-2008 [EUROSTAT Statistics Database]**

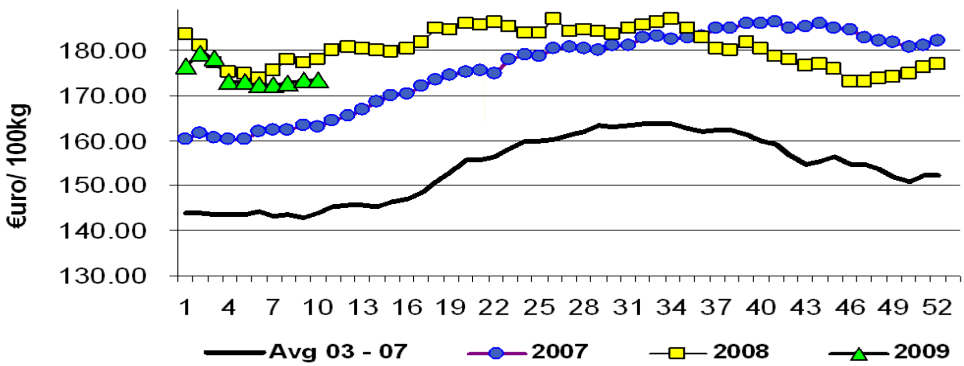

Figure 7 **Weekly evolution of European Community price for broiler chicken, during the period 2003-2009**

CONCLUSIONS

1. European Union market of poultry meat had an increasing evolution during the analysed period.

2. In the last years, the market of refrigerated poultry meat registered a pronounced increase that will continue henceforth, in detriment of frozen meat, pursuant to the more and more noticeable concern of consumers to buy fresh products, safe, savoury, protean balanced.

3. Nowadays, we observe a maturing of alimentary products, where the competition determines the biggest competitors to search new ways of development. In this context, competition on the market of poultry meat and prepared poultry meat emphasizes that consumer requirements turn to specialized products of higher quality.

4. The main producers on market are concerned to diversify the production, either through extension of existing brands or by introducing of new ones.

5. As compared to the average of the European Union, the poultry meat prices differenced on countries: *Romania, 60 %; Bulgaria, 48 %; Poland, 52 %; Denmark, 149 % etc.*

BIBLIOGRAPHY

1. Chiran, A., Gîndu, Elena, Banu, A., Ciobotaru, Elena-Adina, 2004 – *Piaţa produselor agricole şi agroalimentare – abordare teoretică şi practică*. Ed. CERES, Bucureşti.
2. Constantin, M. and col., 2009 – *Marketingul producţiei agroalimentare*. Ed. AgroTehnica, Bucureşti.
3. Datculescu, P., 2006 – *Cercetarea de marketing*. Ed. Brand Builders, Bucureşti.
4. Faglio, A., 1997 – *Il marketing agroalimentare – Mercato e strategie de commercializzazione.* Ed. Franco Angeli Libri S.R.L., Milano, Italy.
5. Gîndu, Elena, Chiran, A., 1998 – *Aspecte privind oferta şi consumul principalelor produse avicole pe plan mondial şi în România*. Lucrări ştiinţifice, U.A.M.V. Iaşi, vol.41, seria Agronomie.
6. Gîndu, Elena, Chiran, A., 1998 – *Cercetări privind piaţa şi distribuţia produselor avicole pe plan mondial şi în România.* Lucr.şt., U.A.M.V. Iaşi, vol. 41, seria Agronomie.
7. Lendrevie, J., Lindon, D., 1990 – *Mercator. Théorie et pratique du marketing*, 4-éme Edition, Dalloz, France.
8. Pascal, Ileana, Deaconu, Şt., 2004 – *Agricultura şi Uniunea Europeană.* Centrul de Resurse Juridice, Bucureşti.
9. Thuiller, P., 1987 – L'étude du marché au plan de marketing. Ed. d'Organisation, Paris, France.
10. Tracy, M., 1996 – Produsele alimentare şi agricultura în economia de piaţă. A.P.S. Bucureşti.
11. Zahiu, Letiţia and col., 2005 – *Politici şi pieţe agricole – reformă şi integrare europeană.* Ed. Ceres, Bucureşti.
12. * * *, 2000 – *Carne de pasăre – piaţa europeană*. Centrul Român de Comerţ Exterior, Bucureşti.