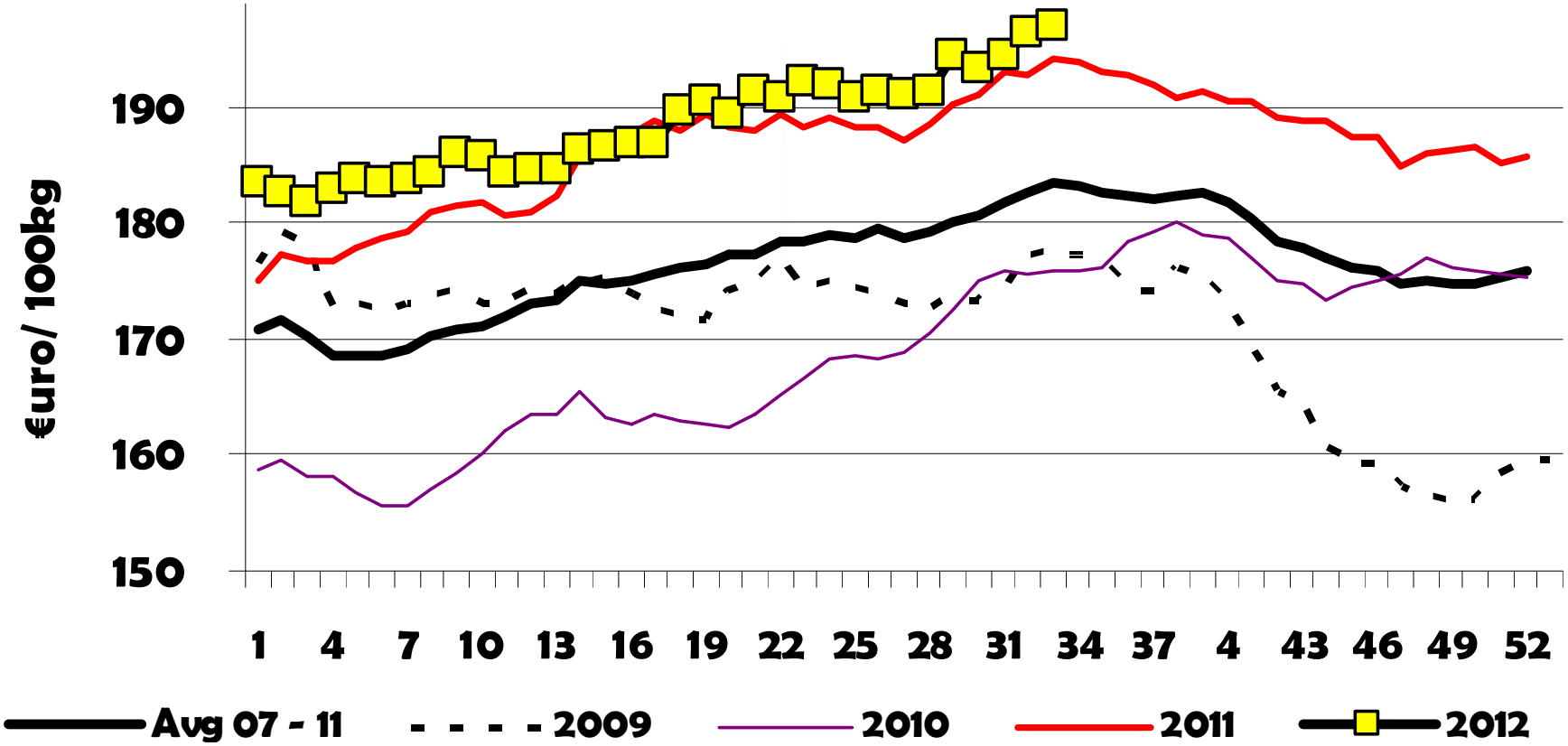
EU Market Situation for Eggs and Poultry

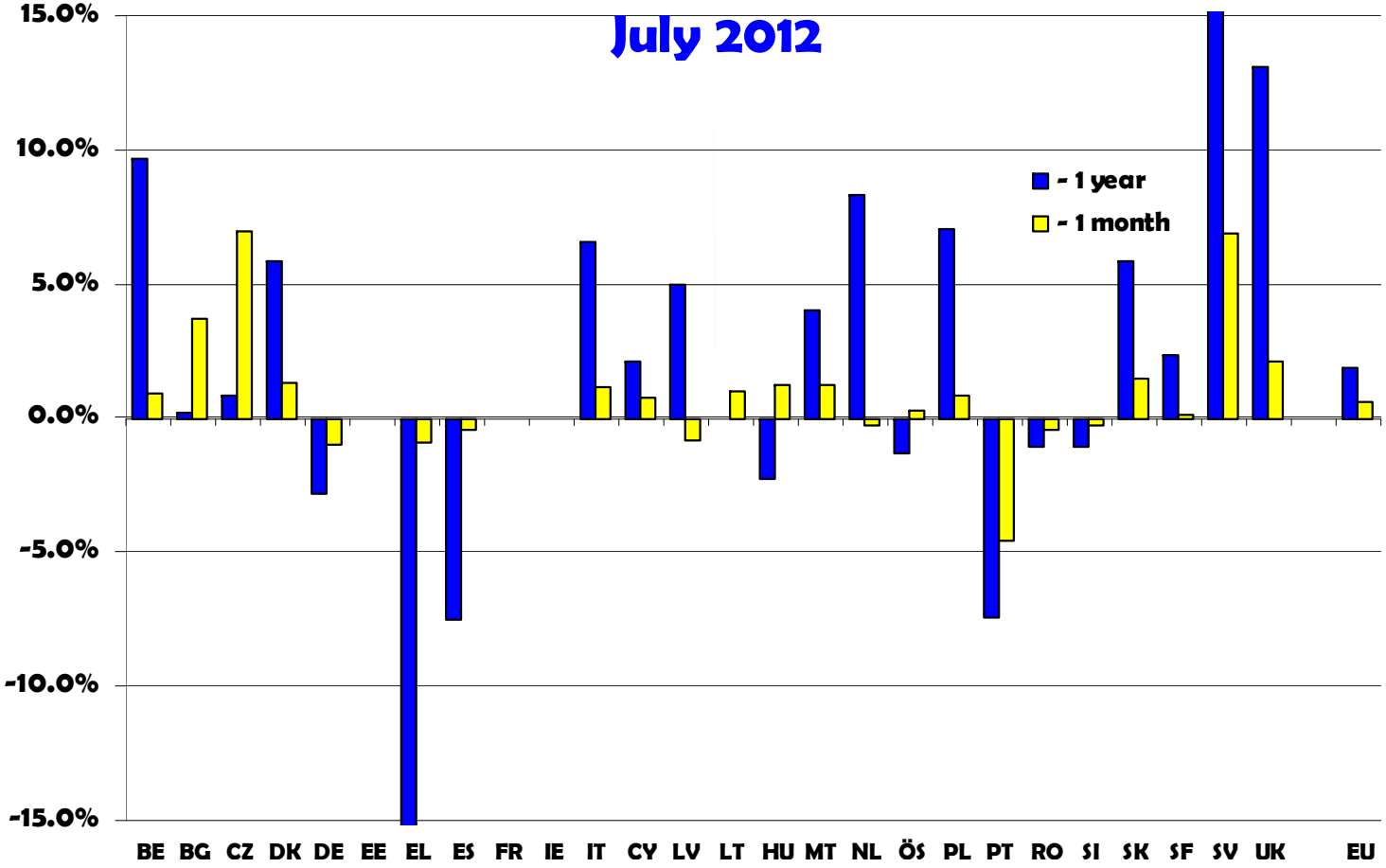
Management Committee

30 August 2012

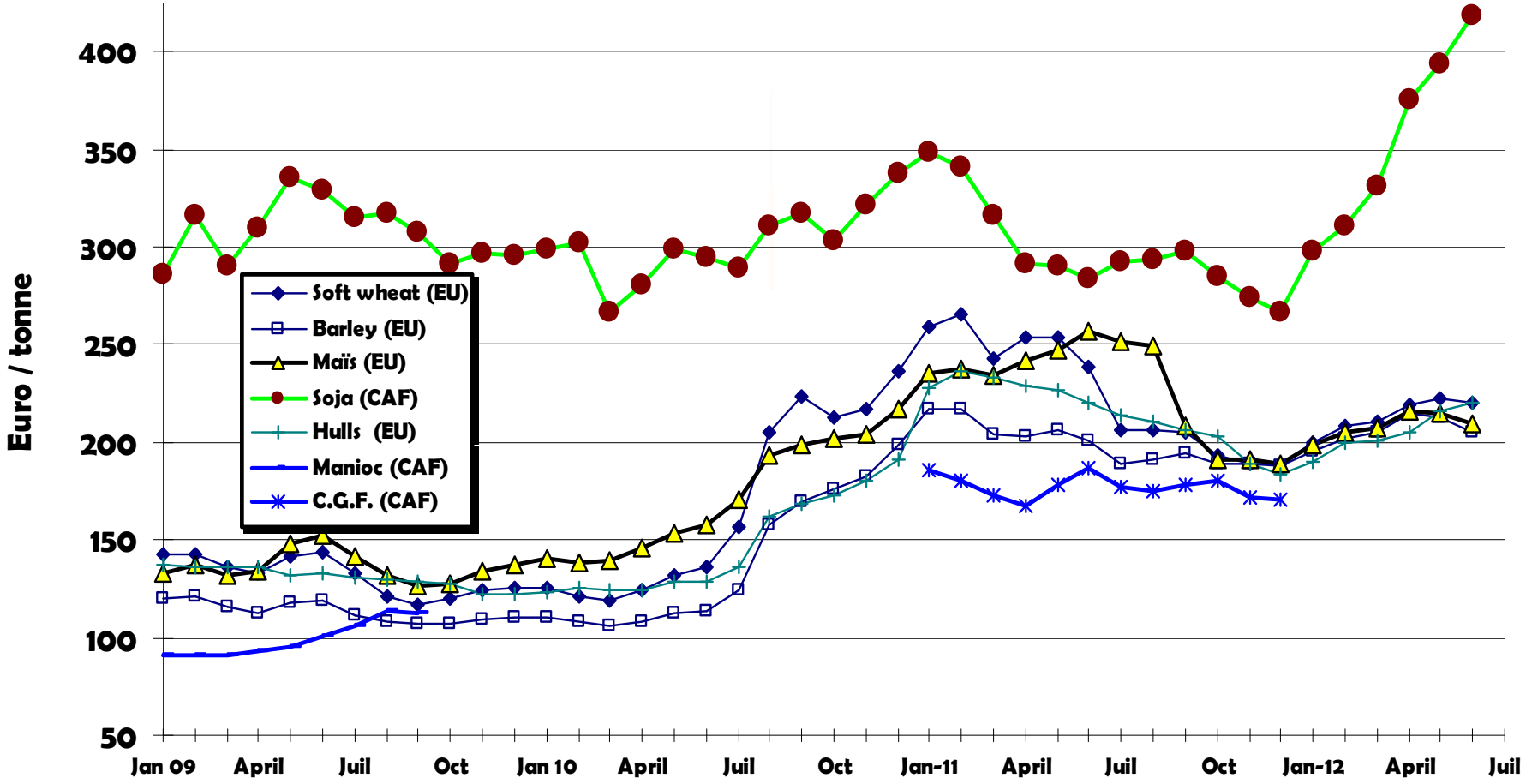
Evolution of the weekly EU average price for Broiler



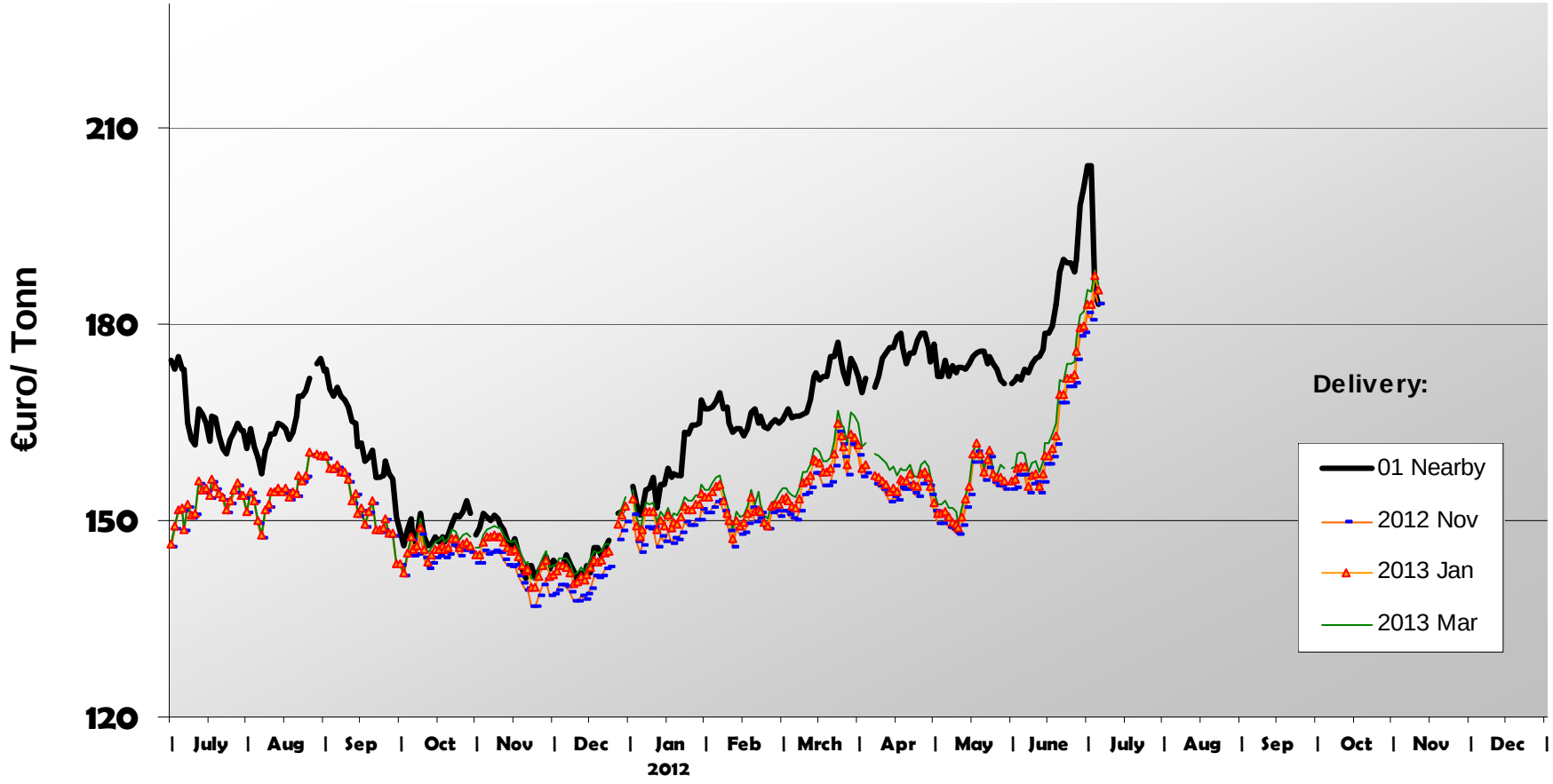
Percentual change of Broiler prices
July 2012



Price of Basic Ingredients 2009 - 2012

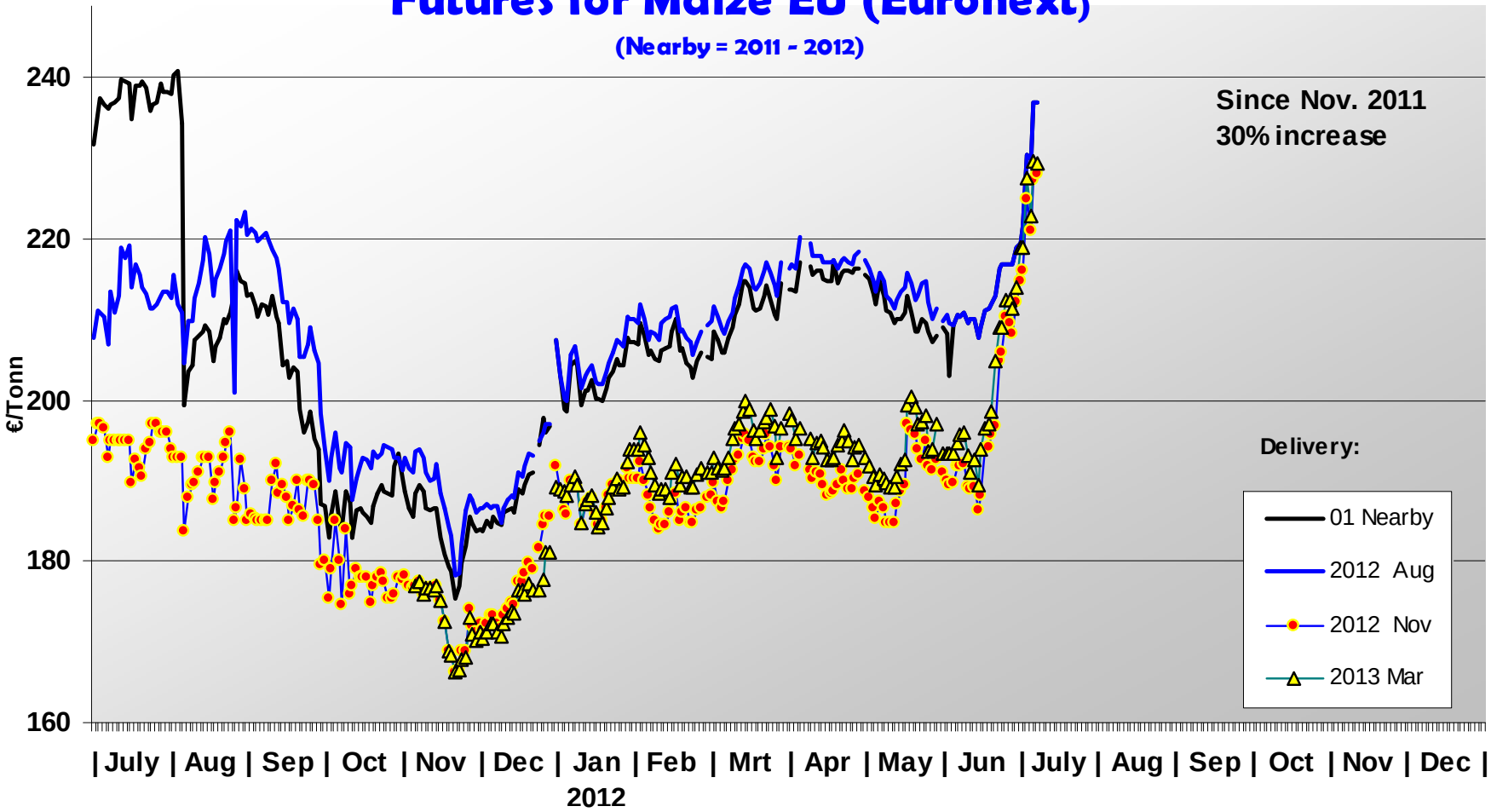


Futures for Feed wheat EU (Euronext)
(Nearby = 2011 & 2012)

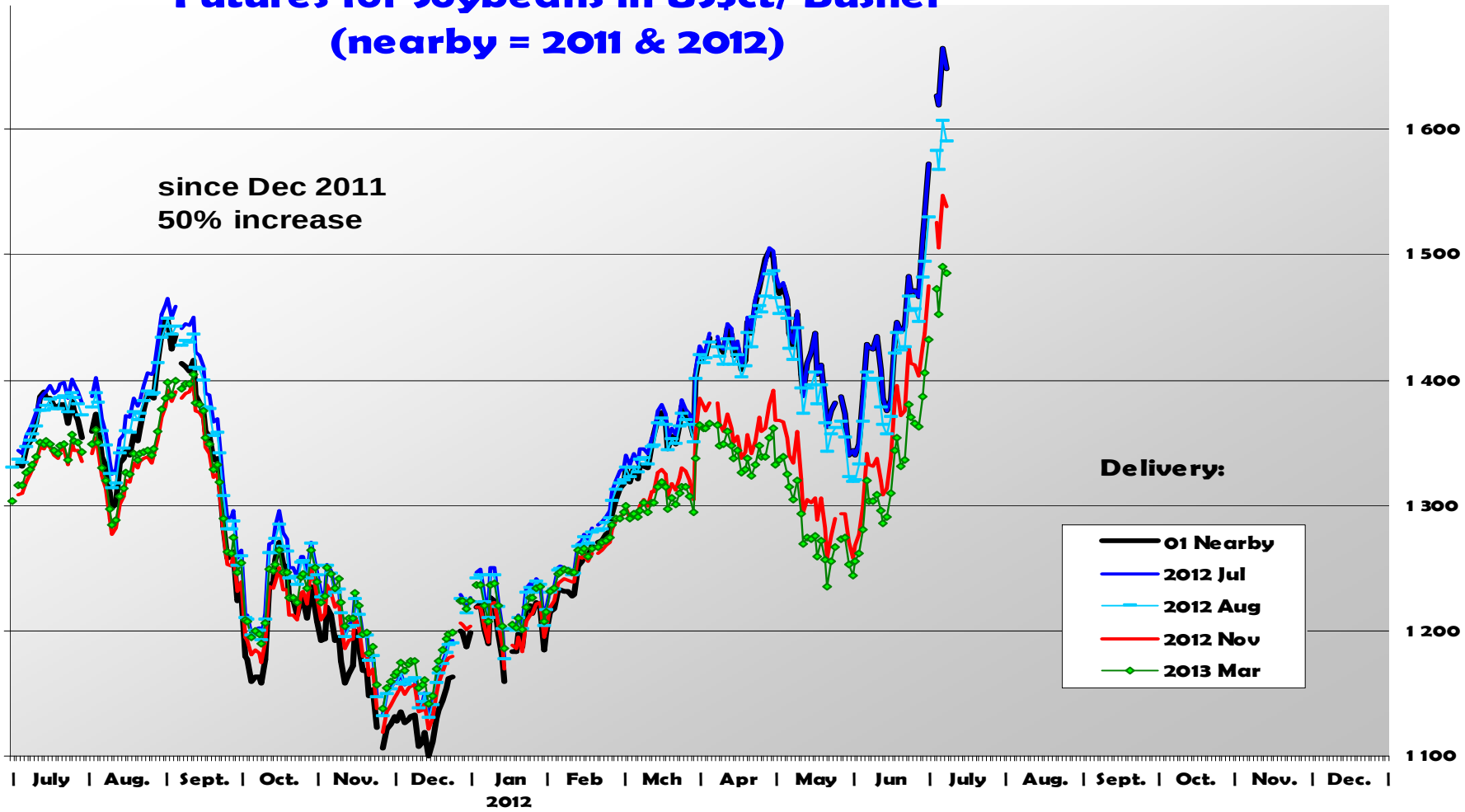


Futures for Maize EU (Euronext)

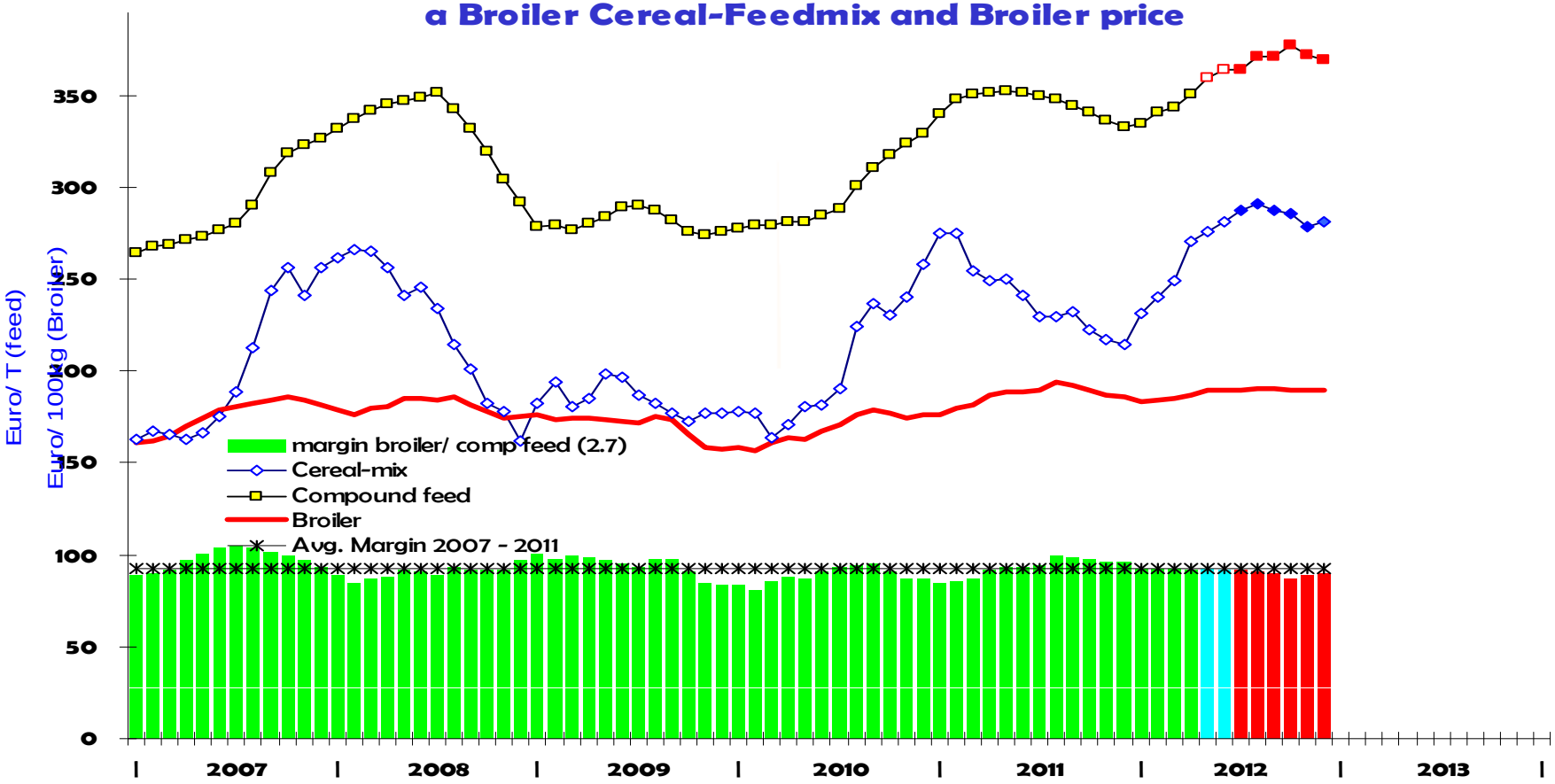
(Nearby = 2011 - 2012)



Futures for Soybeans in US$ct/ Bushel (nearby = 2011 & 2012)



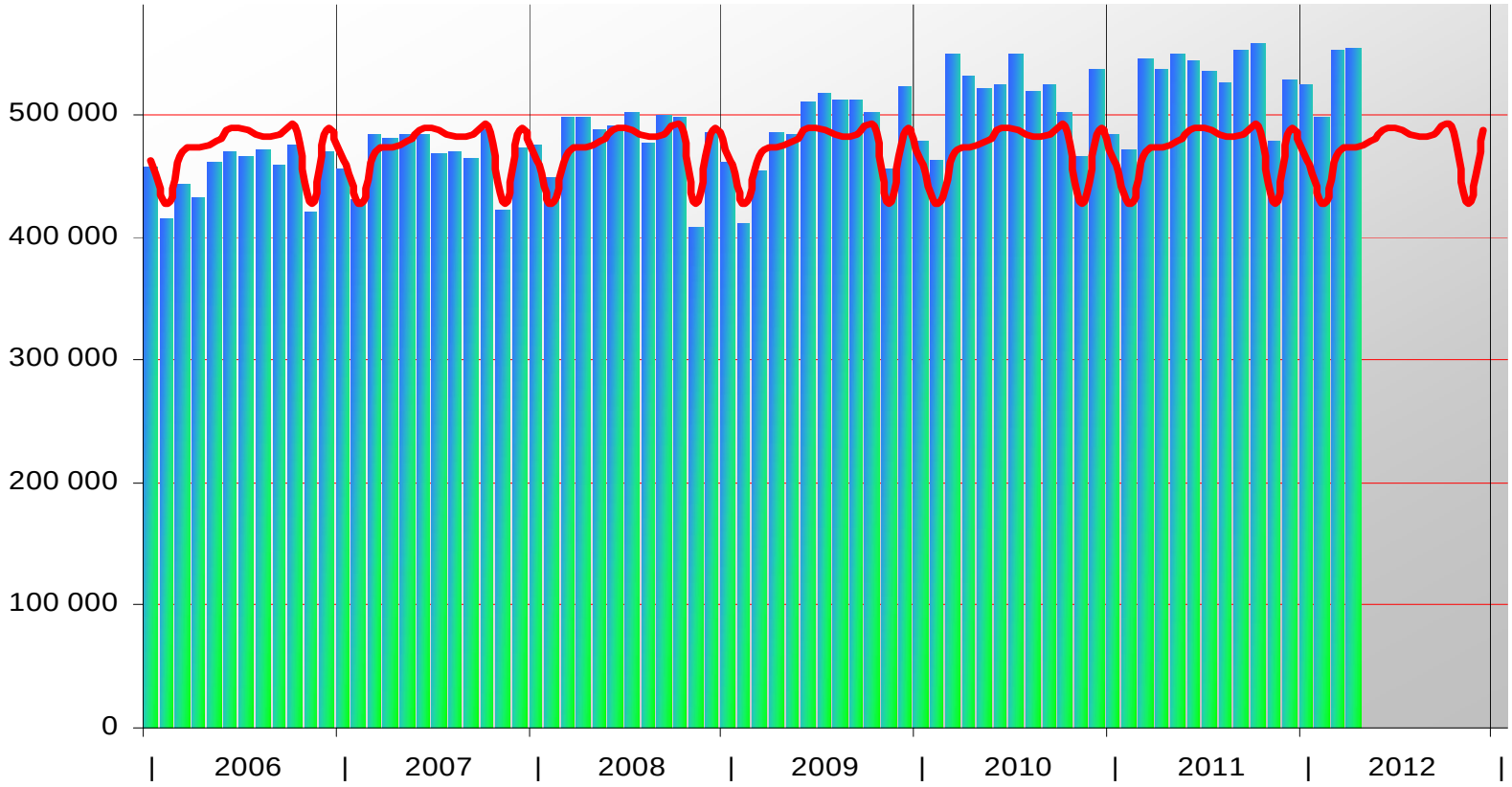
Price development of Compound feed for Broilers, a Broiler Cereal-Feedmix and Broiler price



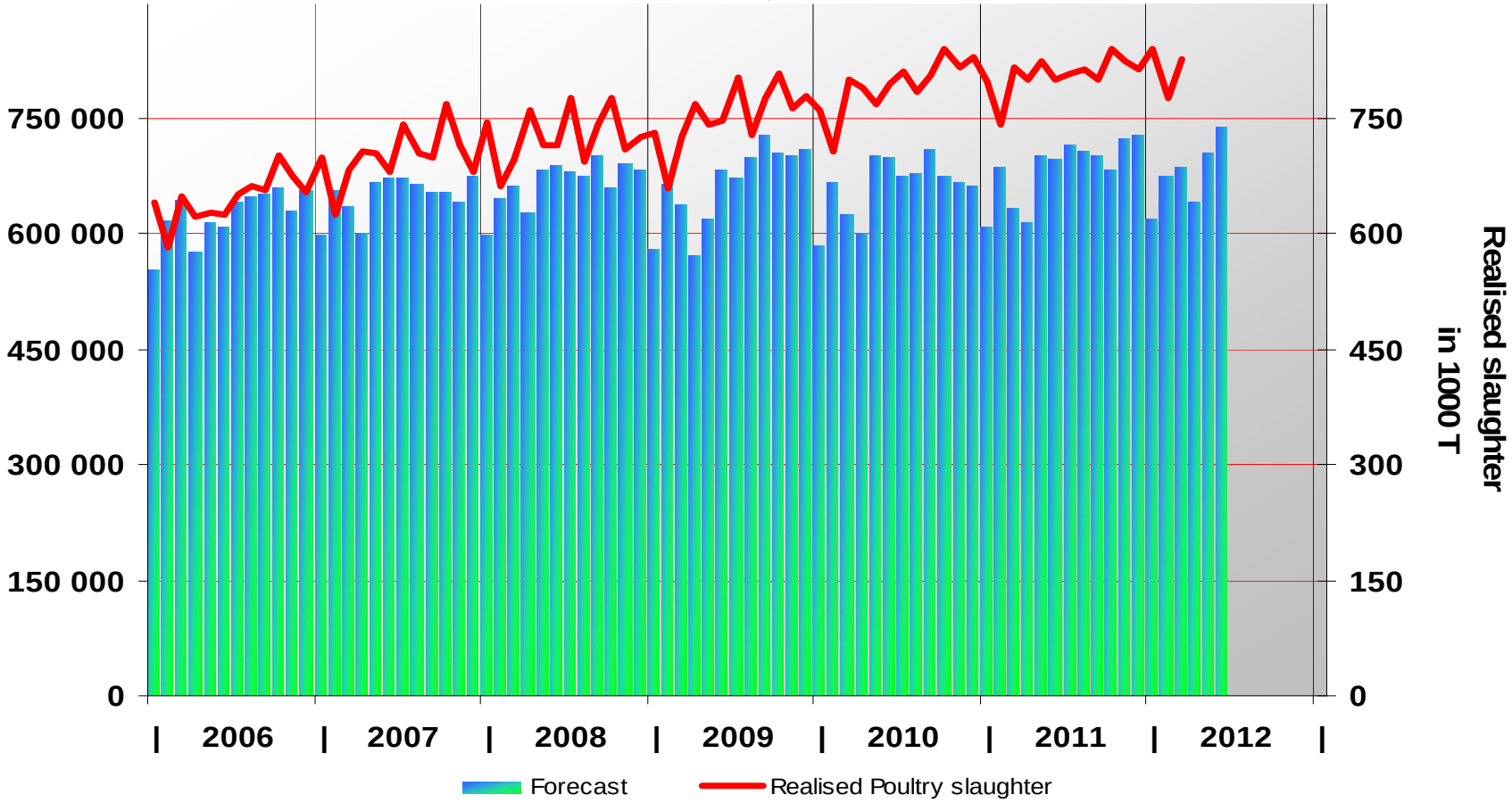
NB. Comp. Feed 2012 =Forecast as from March
Cereal mix and Poultry 2012 = Forecast as from May

Placings of Broiler chicks (1 000 pieces) compared to the baseline trend

(baseline = monthly avg 2006 - 2009)

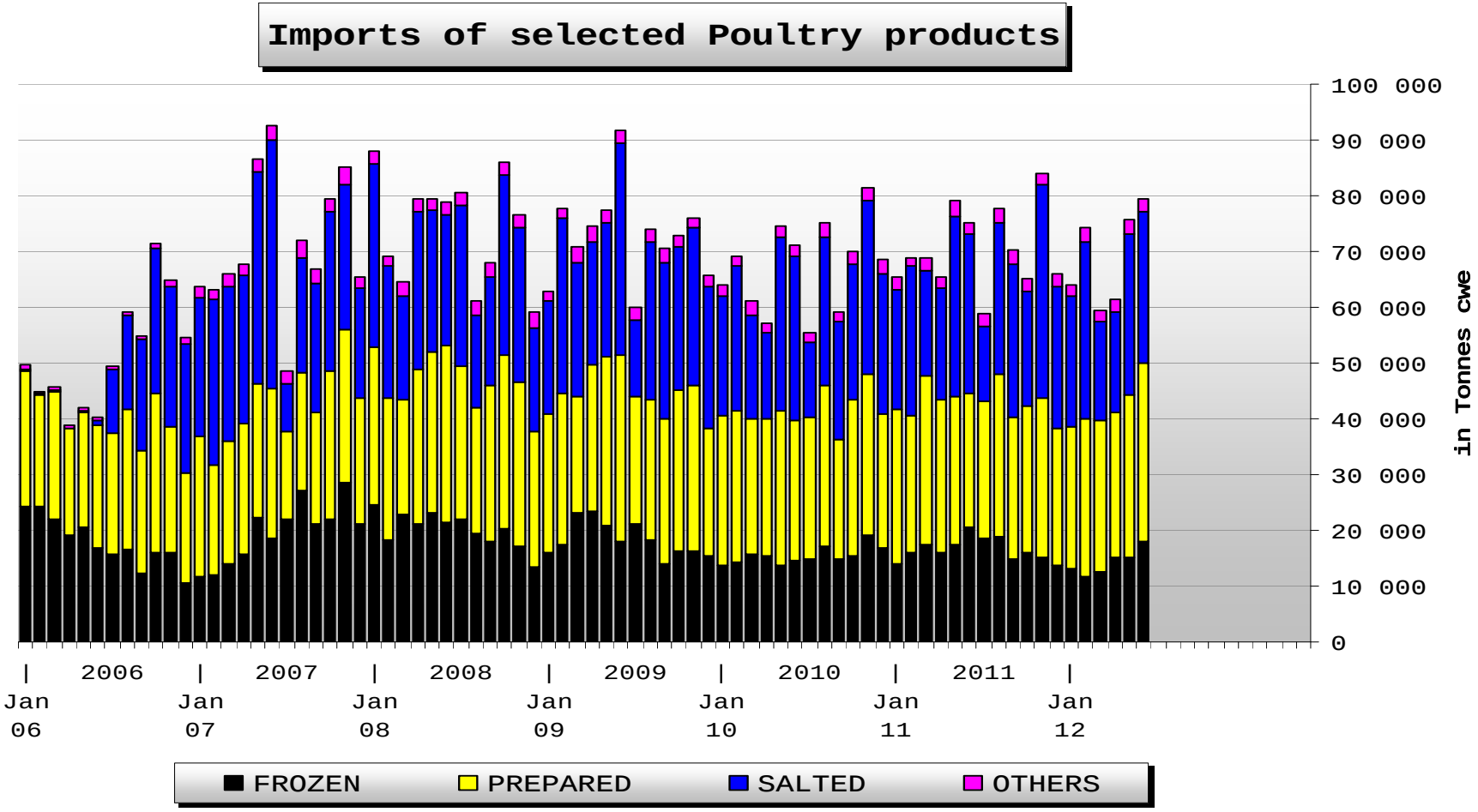


Forecast and Production of Broilers.
In Tonn

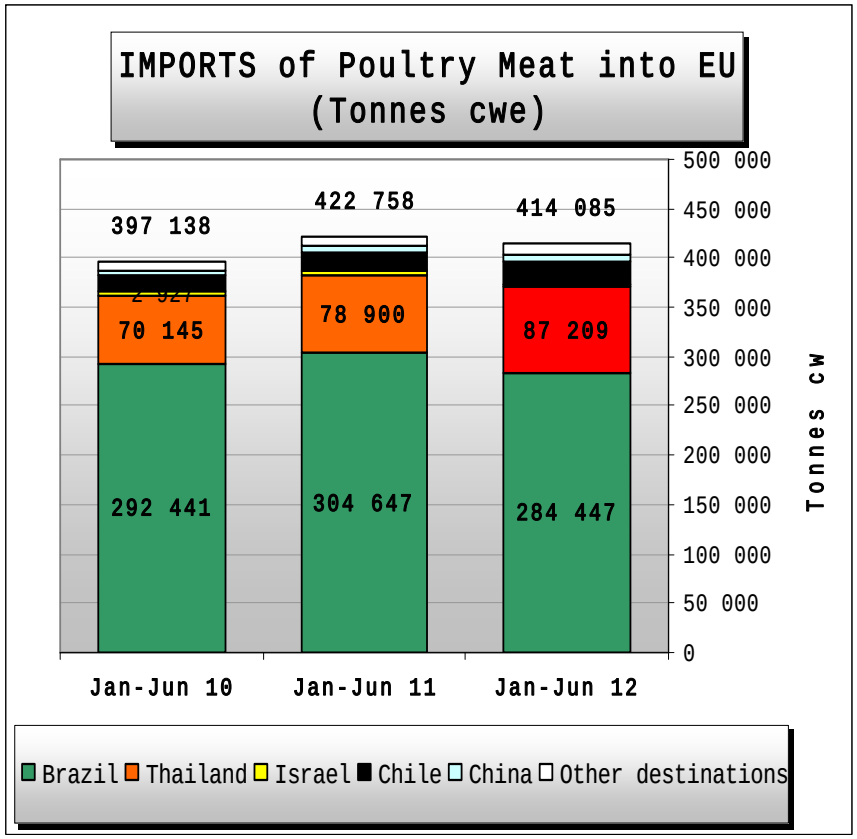


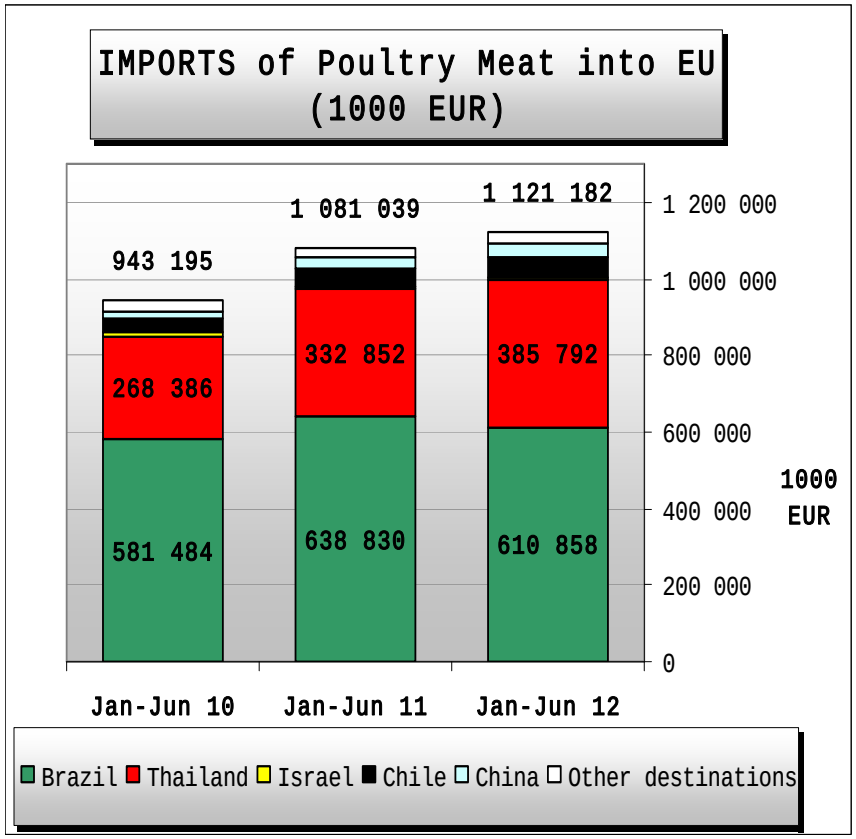
Import of Poultry meat from selected origins

	2008		2009		2010		2011		Jan-Jun 12		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jun 11
Brazil	679 469	76.3%	659 368	75.3%	581 391	72.4%	587 404	71.0%	284 447	68.7%	- 7%
Thailand	146 882	16.5%	141 524	16.2%	149 682	18.6%	154 229	18.6%	87 209	21.1%	+ 11%
Chile	34 718	3.9%	39 022	4.5%	34 276	4.3%	44 306	5.4%	21 940	5.3%	+ 8%
China	15	0.0%	5 690	0.6%	9 997	1.2%	13 735	1.7%	7 173	1.7%	+ 4%
Argentina	20 416	2.3%	20 576	2.3%	15 760	2.0%	15 630	1.9%	6 849	1.7%	- 3%
Israel	6 252	0.7%	5 470	0.6%	7 249	0.9%	7 084	0.9%	1 838	0.4%	- 27%
Croatia	1 884	0.2%	2 295	0.3%	2 650	0.3%	2 714	0.3%	1 362	0.3%	+ 6%
USA	393	0.0%	386	0.0%	439	0.1%	99	0.0%	121	0.0%	+ 266%
Uruguay	109	0.0%	98	0.0%	2	0.0%	7	0.0%	1	0.0%	
EXTRA EU 25/27	891 087		875 886		803 120		827 420		414 085		
% change			- 2%		- 8%		+ 3%		- 2.1%		


Imports of selected Poultry products
100 000
90 000
80 000
70 000
60 000
50 000
40 000
30 000
20 000
10 000
0
in Tonnes cwe
2006
2007
2008
2009
2010
2011
Jan 06
Jan 07
Jan 08
Jan 09
Jan 10
Jan 11
Jan 12
FROZEN
PREPARED
SALTED
OTHERS

EU Poultry meat Import

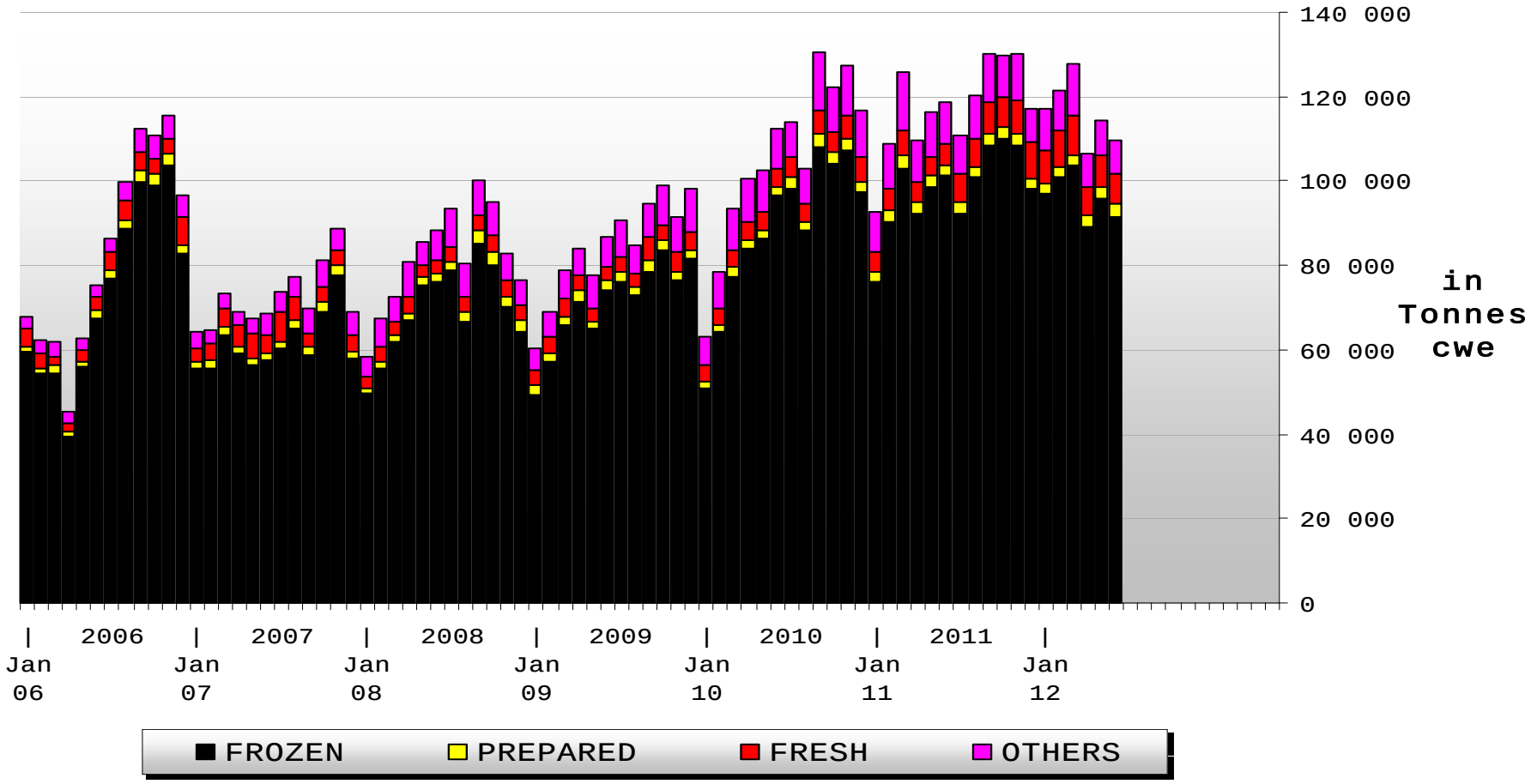




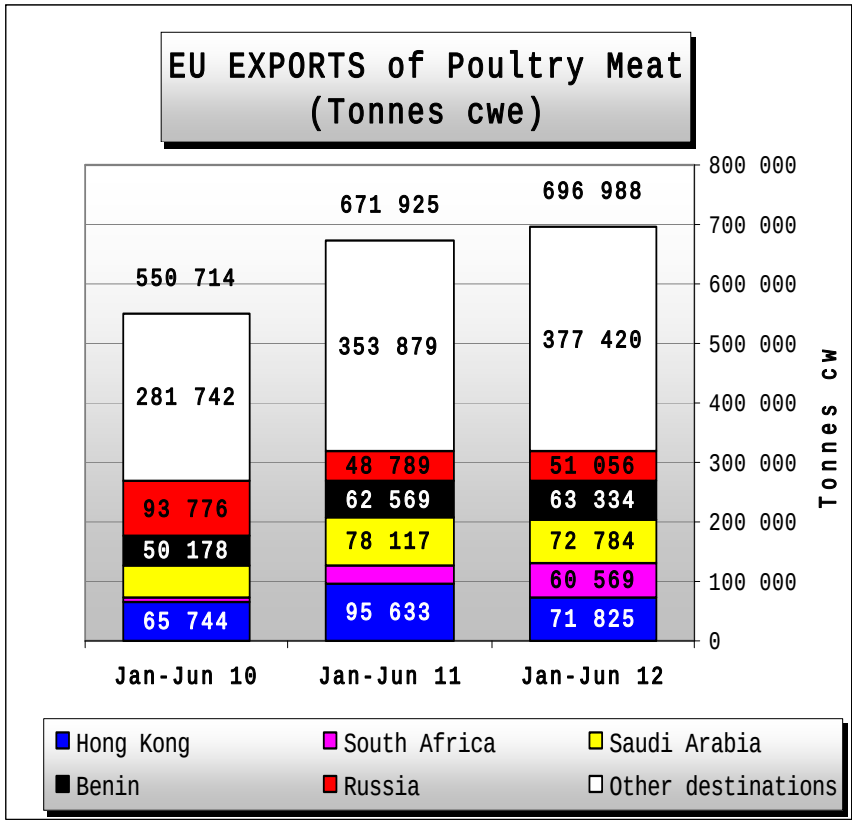
Export of Poultry Meat to Selected Destinations

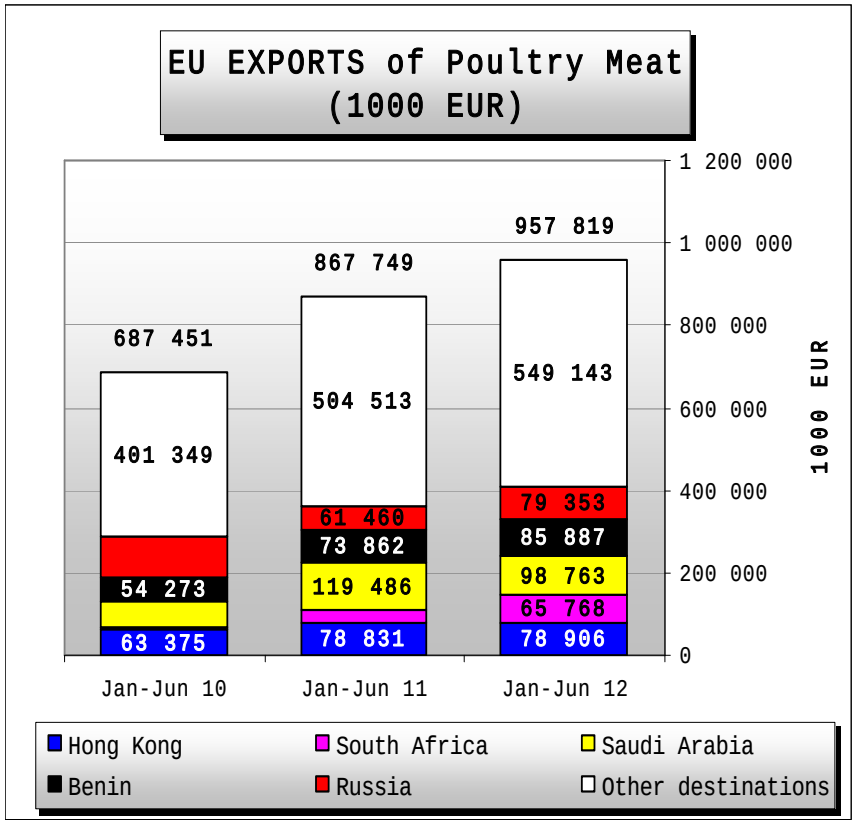
	2008		2009		2010		2011		Jan-Jun 12		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-Jun 11
Saudi Arabia	95 132	9.7%	97 485	9.6%	118 020	9.3%	151 269	10.7%	72 784	10.4%	- 7%
Hong Kong	58 669	6.0%	88 357	8.7%	151 559	12.0%	188 345	13.3%	71 825	10.3%	- 25%
Benin	83 405	8.5%	84 912	8.4%	115 065	9.1%	126 022	8.9%	63 334	9.1%	+ 1%
South Africa	6 295	0.6%	7 938	0.8%	22 007	1.7%	94 163	6.7%	60 569	8.7%	+ 84%
Russia	230 113	23.4%	227 555	22.4%	245 478	19.4%	115 001	8.1%	51 056	7.3%	+ 5%
Ukraine	112 444	11.4%	89 314	8.8%	86 007	6.8%	81 736	5.8%	46 393	6.7%	+ 32%
Ghana	31 530	3.2%	28 694	2.8%	41 069	3.2%	68 896	4.9%	33 137	4.8%	+ 15%
Yemen	26 673	2.7%	36 331	3.6%	39 632	3.1%	37 970	2.7%	19 593	2.8%	+ 16%
Congo (Dem. Rep	21 386	2.2%	20 903	2.1%	27 749	2.2%	29 950	2.1%	16 780	2.4%	+ 7%
Switzerland	28 200	2.9%	28 111	2.8%	29 804	2.4%	29 330	2.1%	14 520	2.1%	+ 0%
Malaysia	17 888	1.8%	22 676	2.2%	25 899	2.0%	20 965	1.5%	13 637	2.0%	+ 57%
Vietnam	39 488	4.0%	39 971	3.9%	31 674	2.5%	29 086	2.1%	13 269	1.9%	- 11%
Extra-EU27	982 286		1 015 784		1 265 183		1 411 142		696 988		
% change			+ 3%		+ 25%		+ 12%		+ 3.7%		

Exports of selected Poultry products

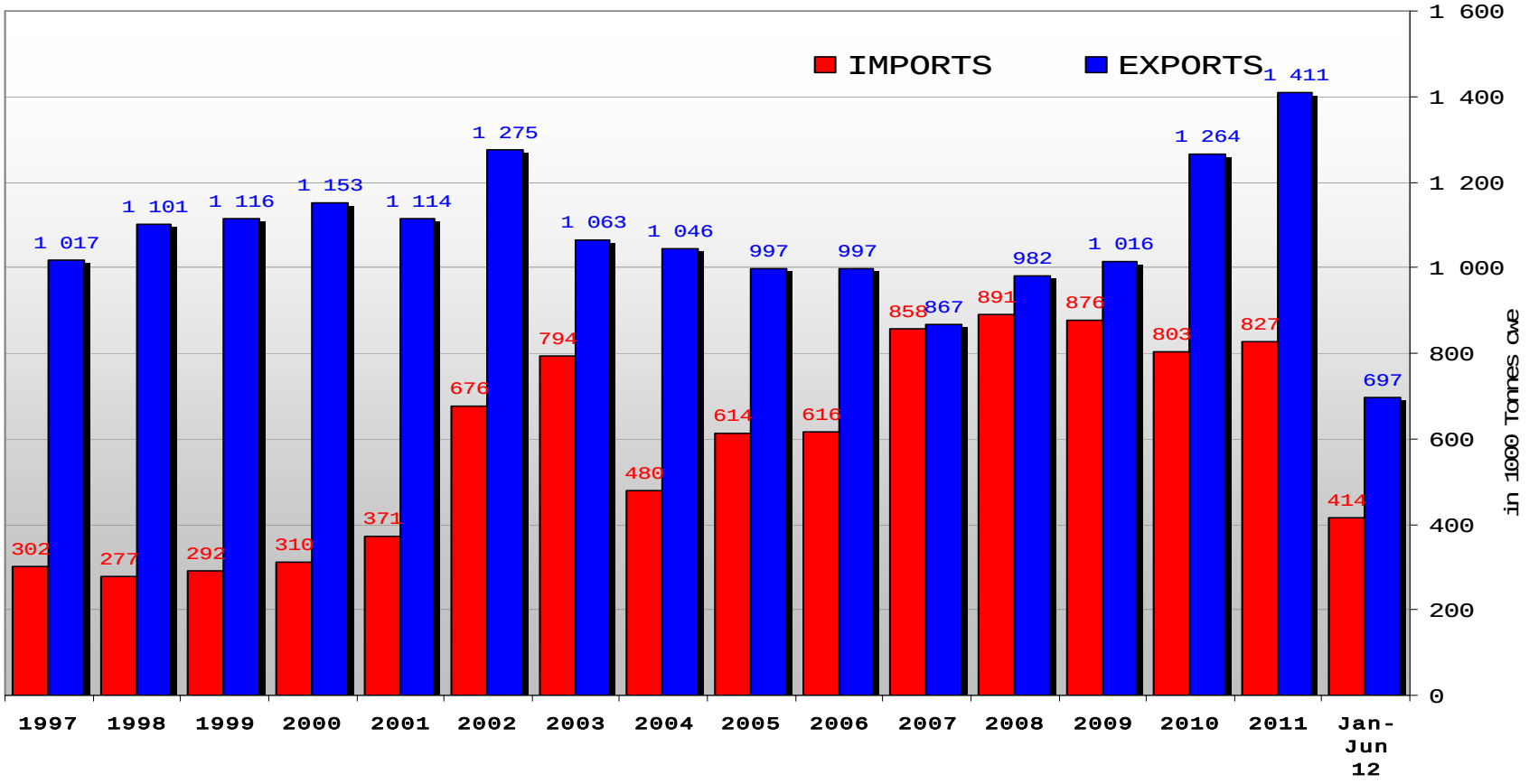


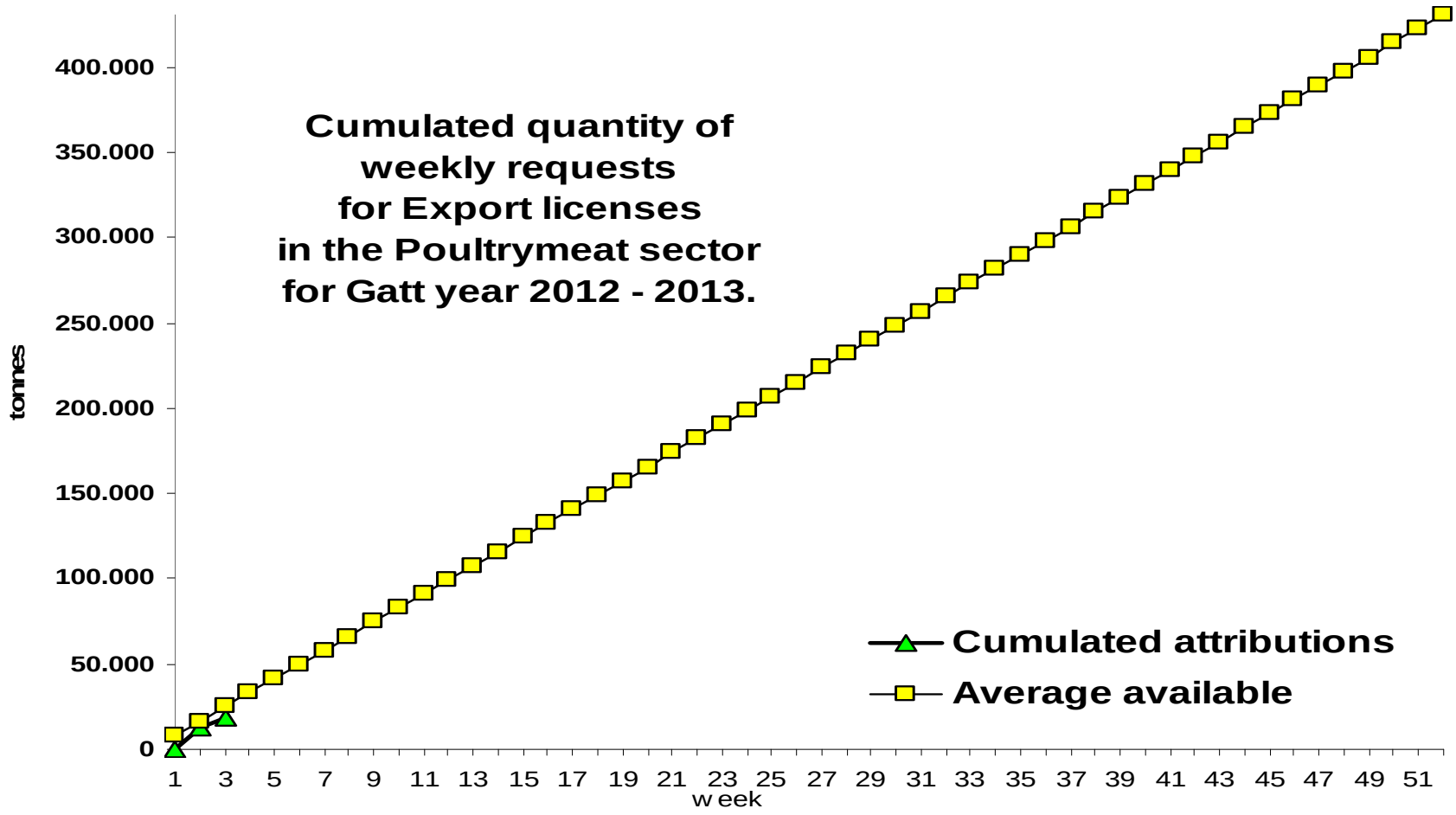
EU Poultry meat Export





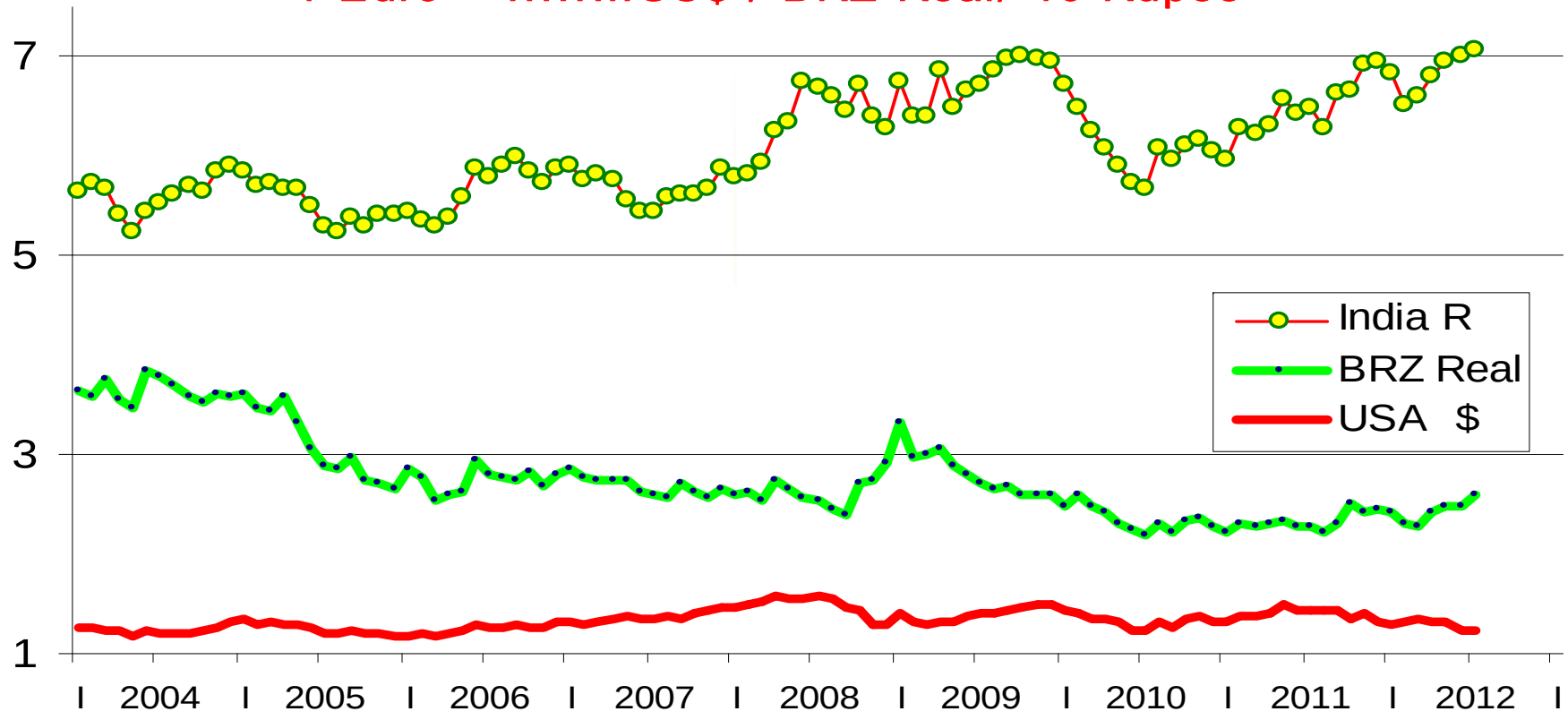
EU Poultry meat Trade Balance




Cumulated quantity of
weekly requests
for Export licenses
in the Poultrymeat sector
for Gatt year 2012 - 2013.
tonnes
400.000
350.000
300.000
250.000
200.000
150.000
100.000
50.000
0
1 3 5 7 9 11 13 15 17 19 21 23 25 27 29 31 33 35 37 39 41 43 45 47 49 51
week
Cumulated attributions
Average available

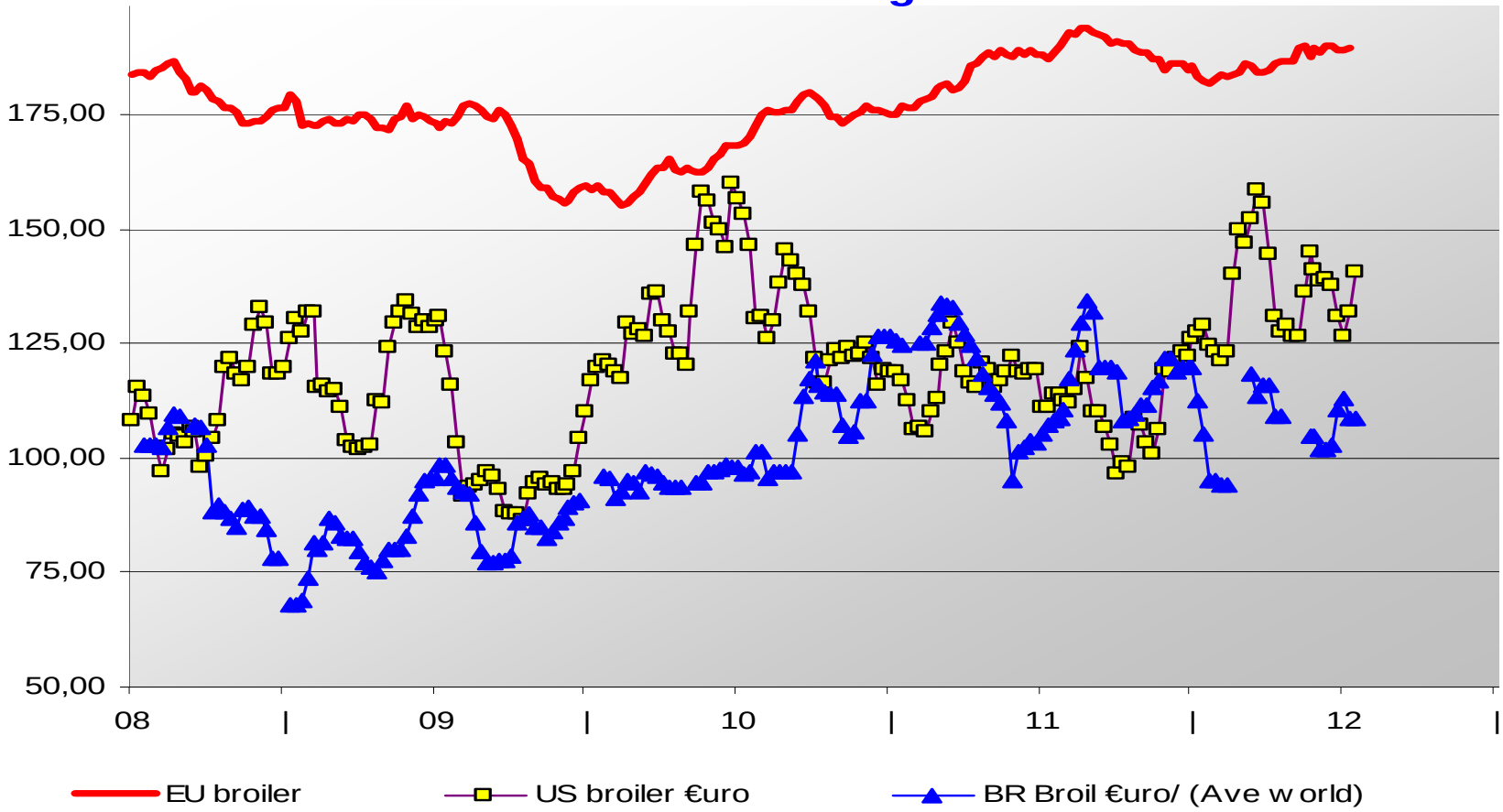
€uro Exchange rate

1 Euro = ...US$ / BRZ Real/ 10 Rupee



source:http://europa.eu.int/comm/budget/inforeuro/fr/index.htm

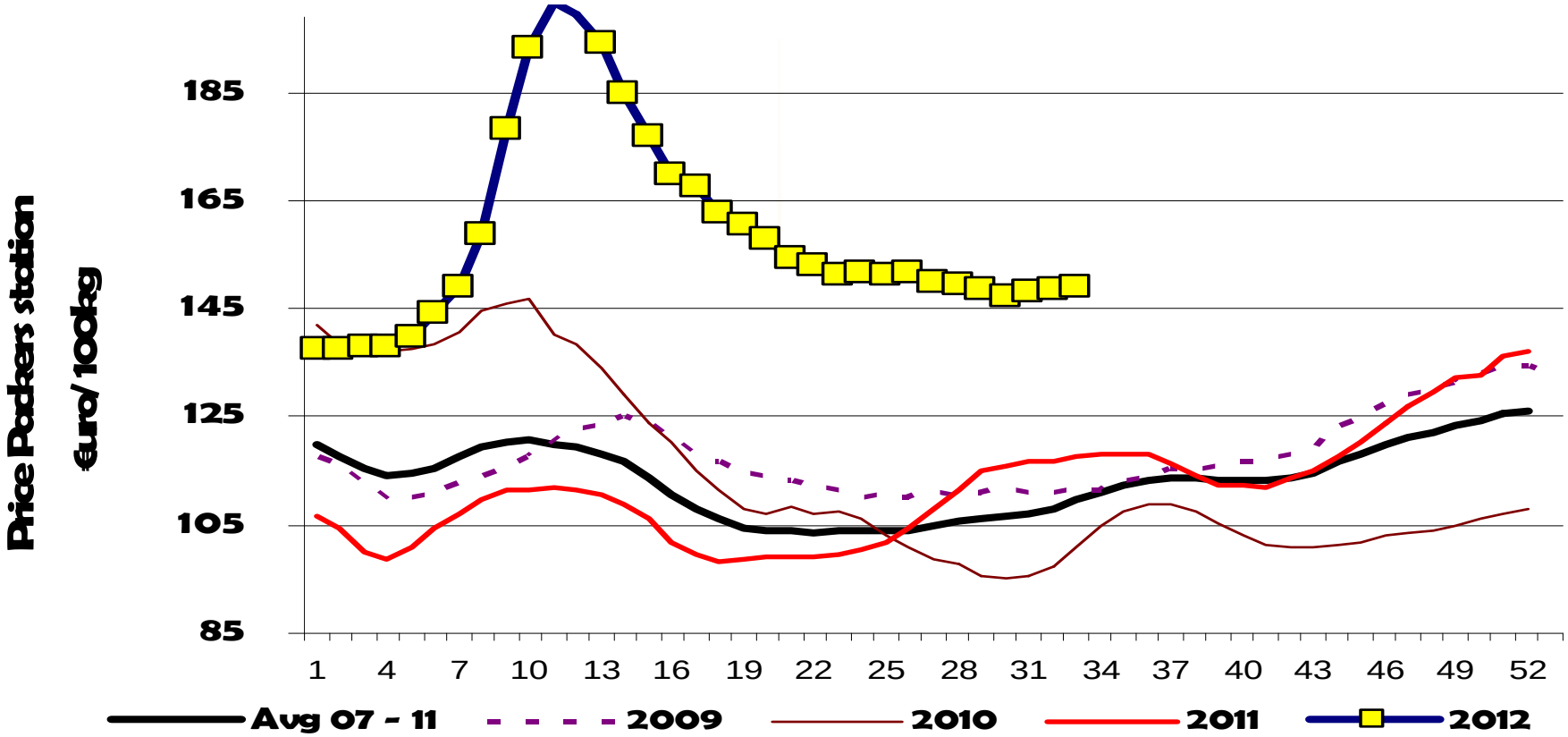
Broiler prices The EU, USA and Brazil in €uro/ 100kg



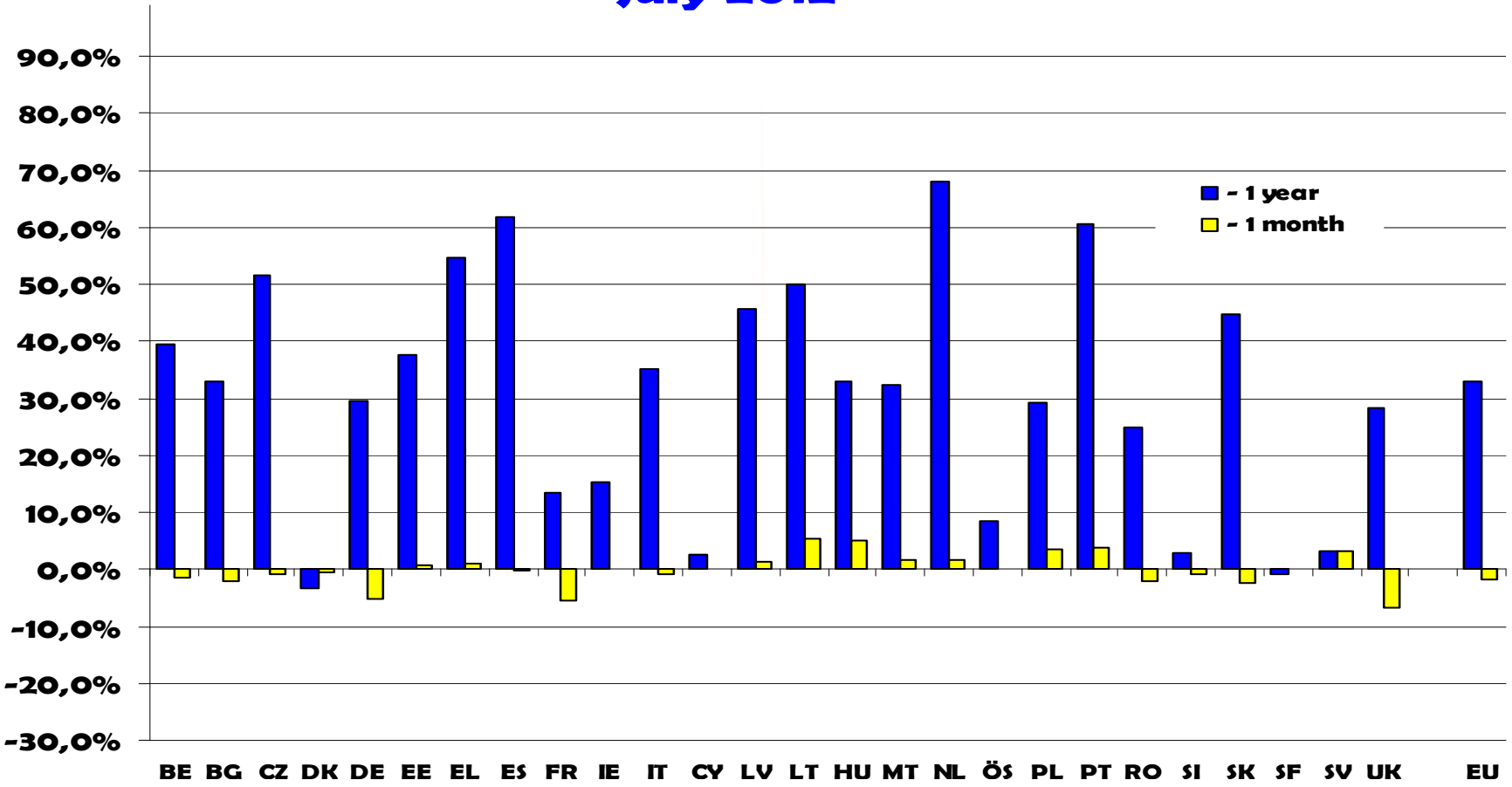
EU Market Situation for Eggs

Management Committee 30 August 2012

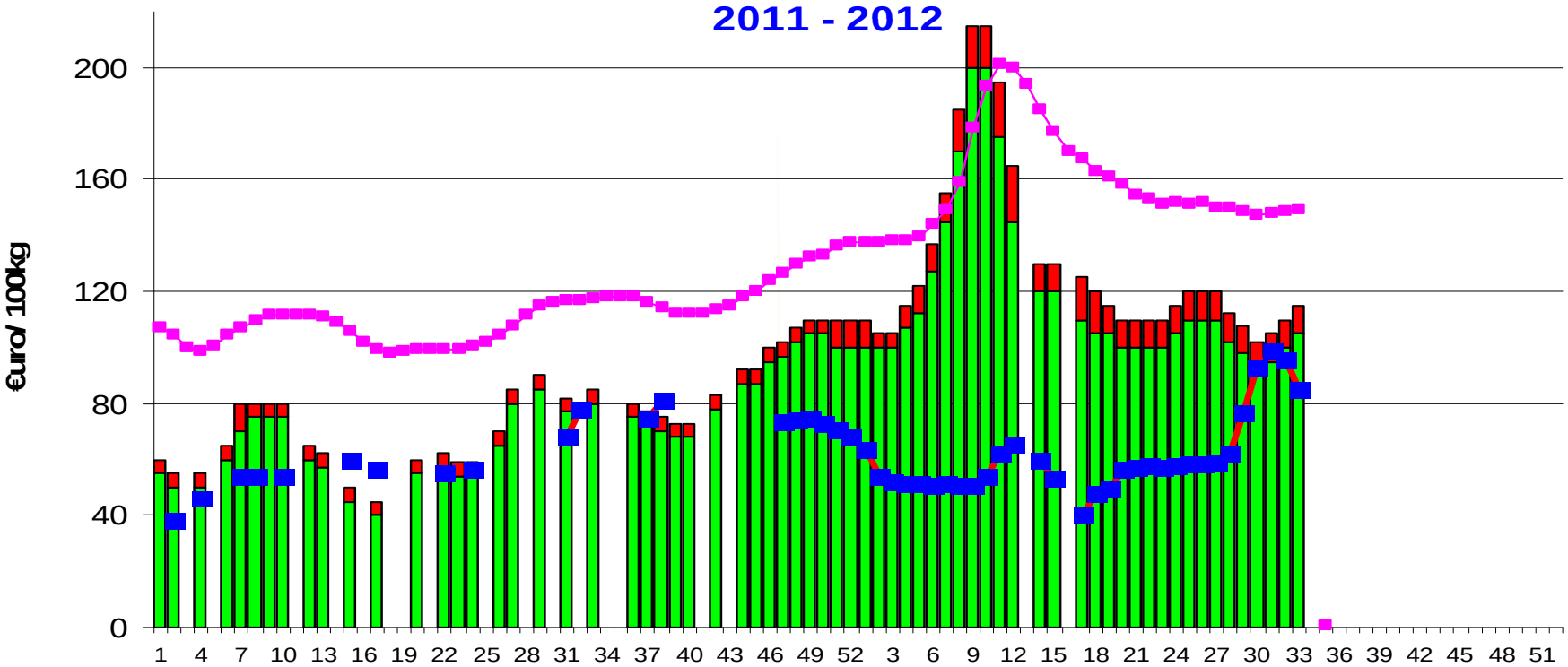
Evolution of the weekly EU average price for Eggs for Consumption



Percentual change of Egg prices
July 2012



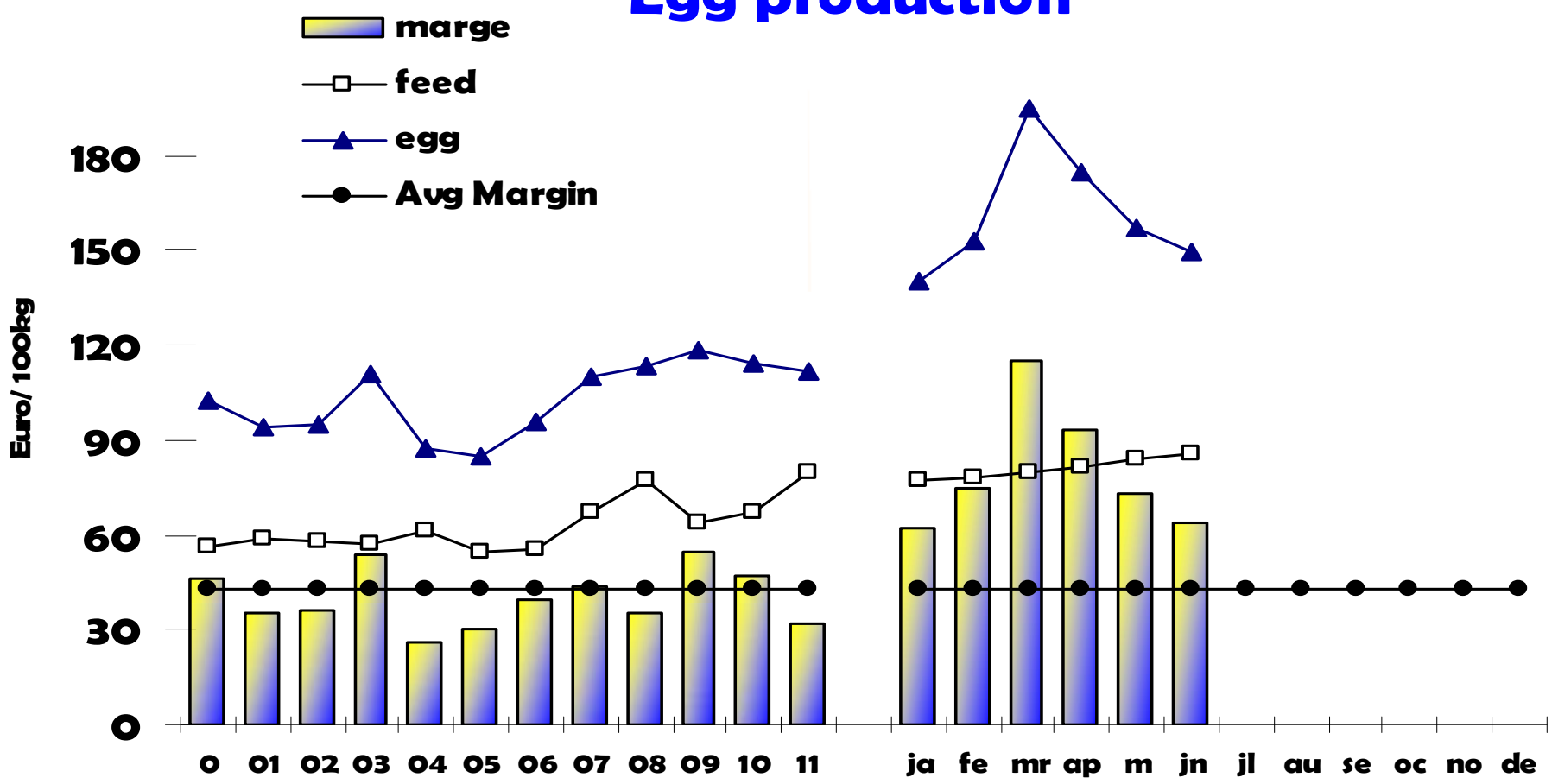
Prices for Eggs for consumption and Eggs for breaking 2011 - 2012



91,7% increase for Eggs for Breaking from week 1 2011 to week 33 2012
39,7% increase for Eggs for Consumption from week 1 2011 to week 33 2012

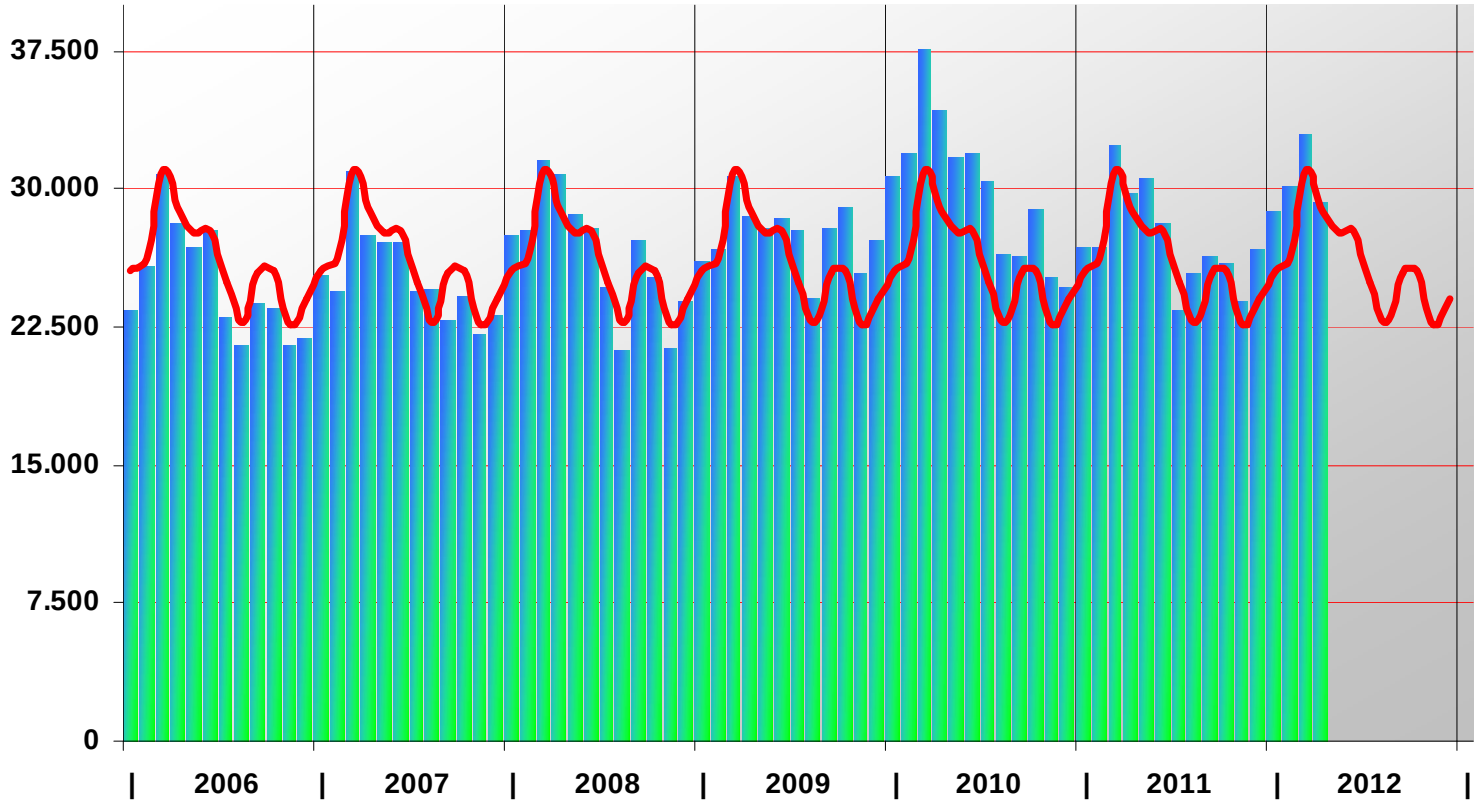
EU Low **difference** **Eggs for Consumption** **US High breaking**

Margin between Feed cost and Egg price in Egg production



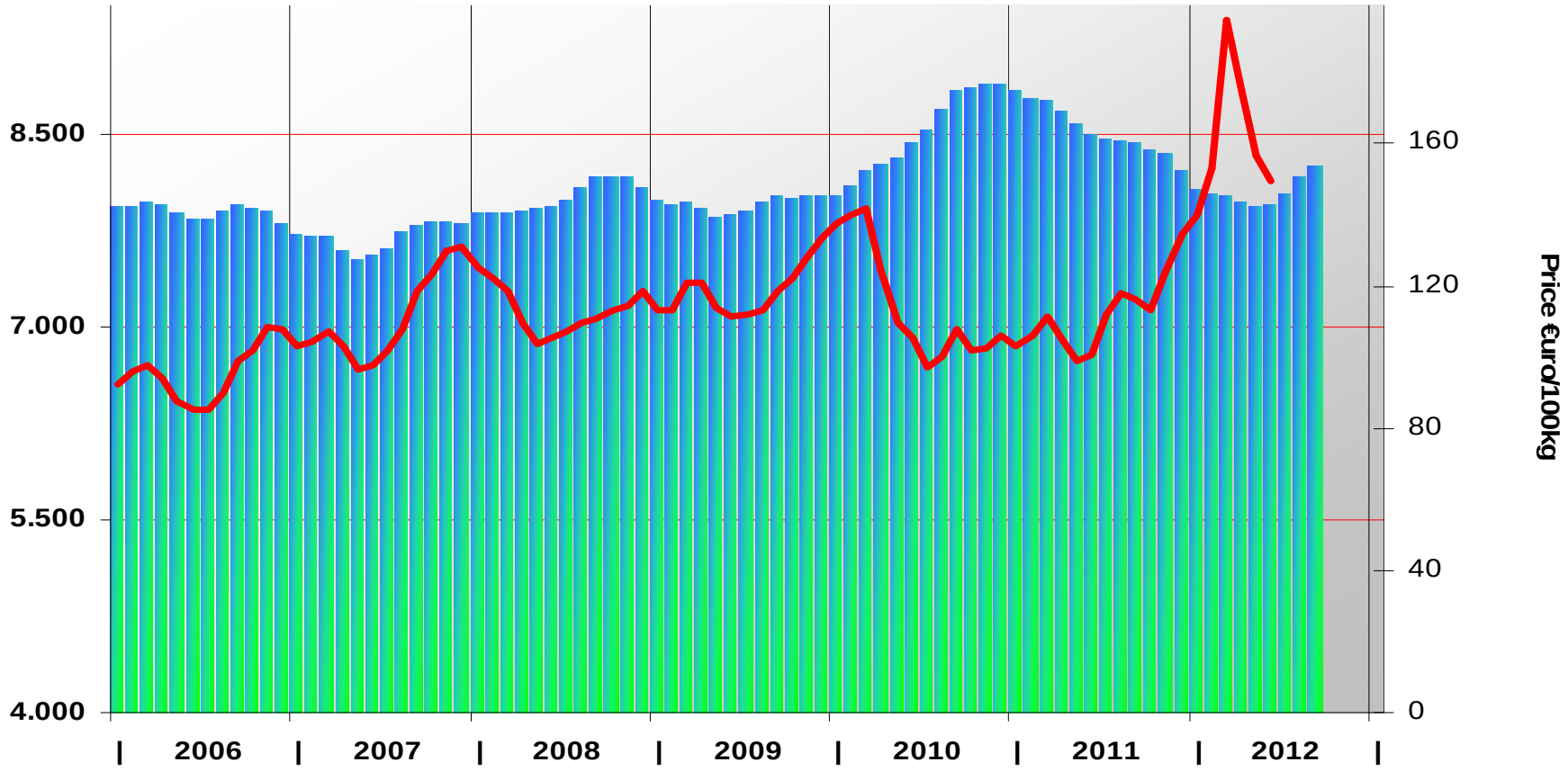
Placings of Laying chicks (1 000 pieces) compared to the baseline trend

(baseline= monthly avg 2006 - 2009)



Production forecast of eggs in shell (Mio p).

compared to the price development

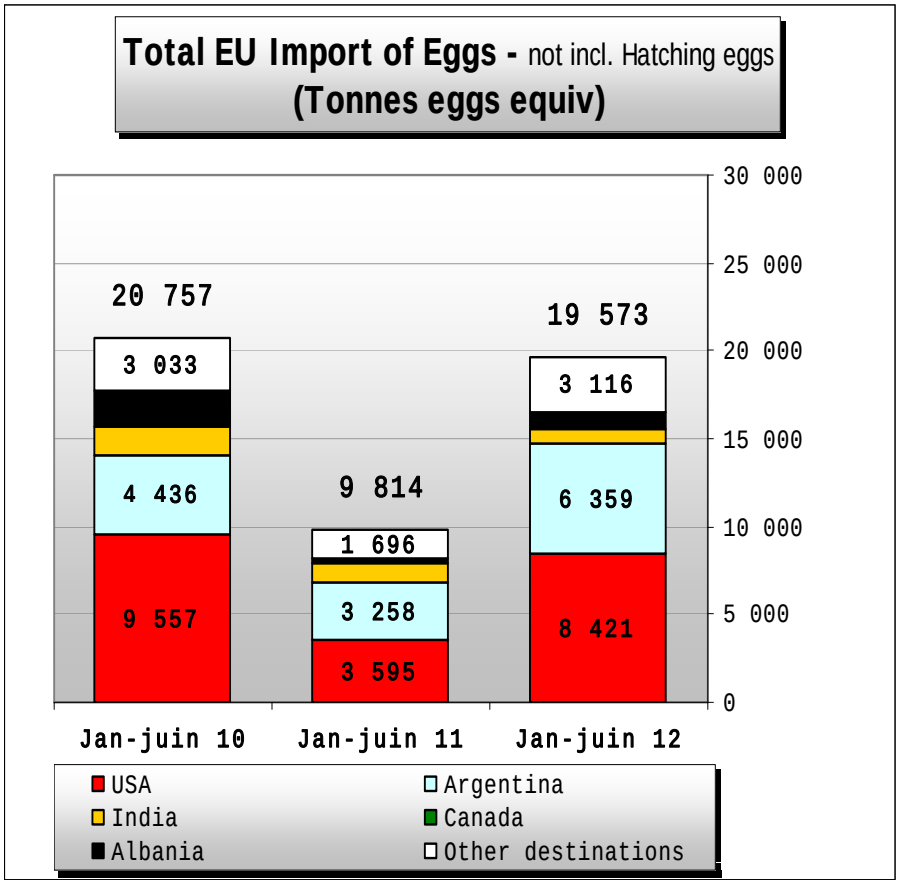


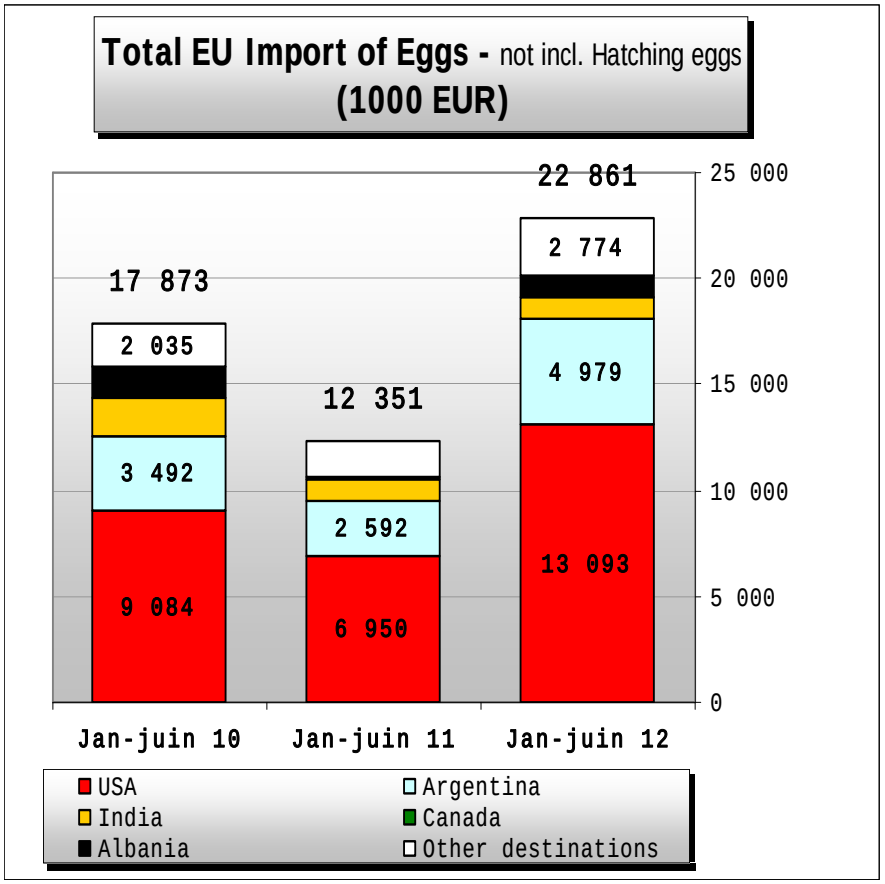
EU Imports of Eggs:

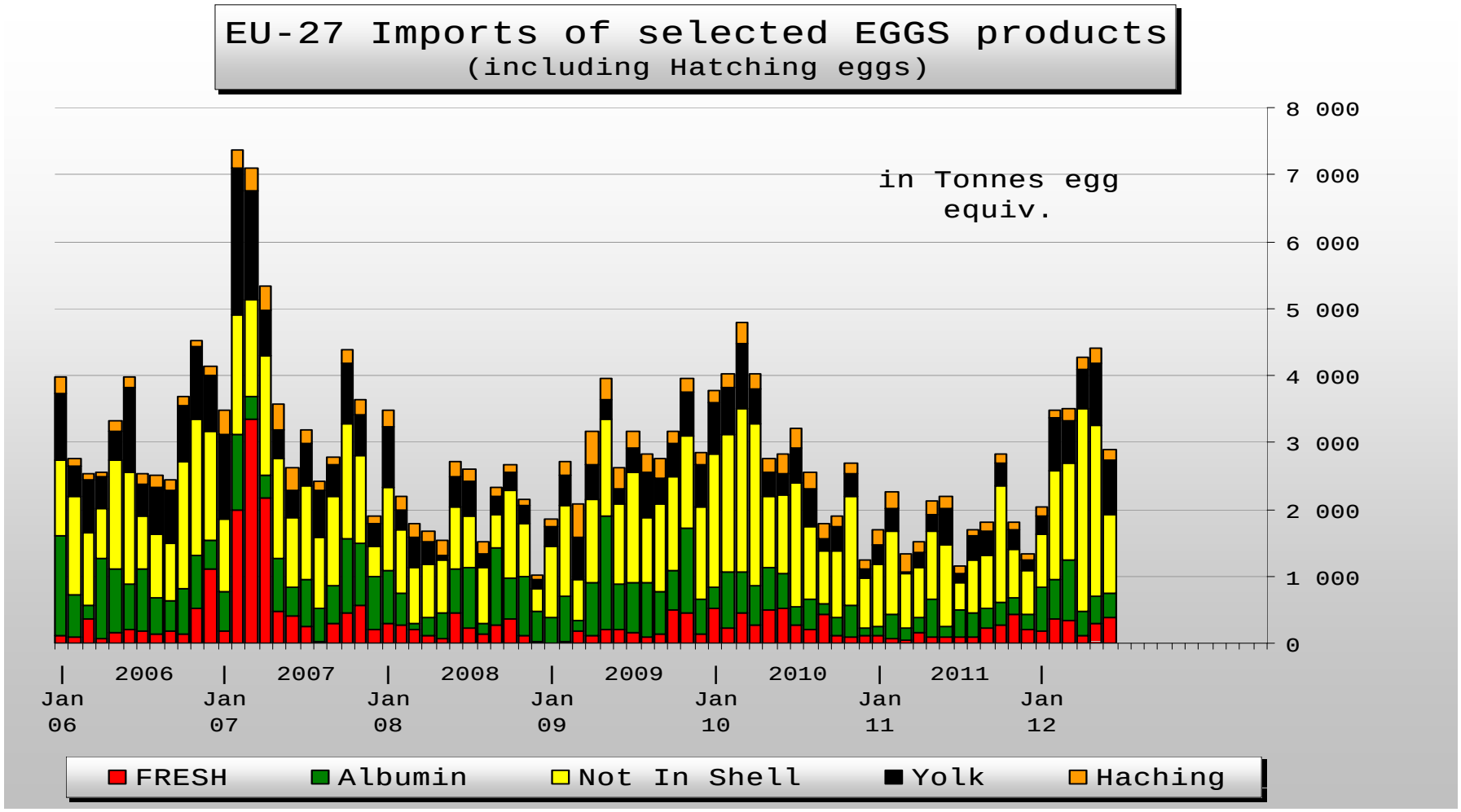
Trade Figures *(Comext – tonnes egg equiv.)* not incl. Hatching eggs

	2008		2009		2010		2011		Jan-juin 12		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-juin 11
USA	4 245	18.6%	11 165	36.7%	13 439	42.9%	5 417	28.4%	8 421	43.0%	+ 134%
Argentina	6 164	27.0%	7 899	26.0%	7 888	25.2%	7 898	41.5%	6 359	32.5%	+ 95%
Mexico	2 002	8.8%	1 893	6.2%	1 425	4.5%	556	2.9%	1 017	5.2%	+ 967%
Albania	2 209	9.7%	1 659	5.5%	3 208	10.2%	1 303	6.8%	912	4.7%	+ 296%
India	6 593	28.9%	5 776	19.0%	3 211	10.2%	1 505	7.9%	698	3.6%	- 33%
Israel	646	2.8%	711	2.3%	941	3.0%	547	2.9%	597	3.1%	+ 39%
Canada	1	0.0%	33	0.1%	2	0.0%	0	0.0%	67	0.3%	
Brazil	64	0.3%	67	0.2%	0	0.0%	0	0.0%	0	0.0%	
EXTRA EU 25/27	22 850		30 409		31 356		19 045		19 573		
% change			+ 33%		+ 3%		- 39%		+ 99.4%		

EU Egg Imports





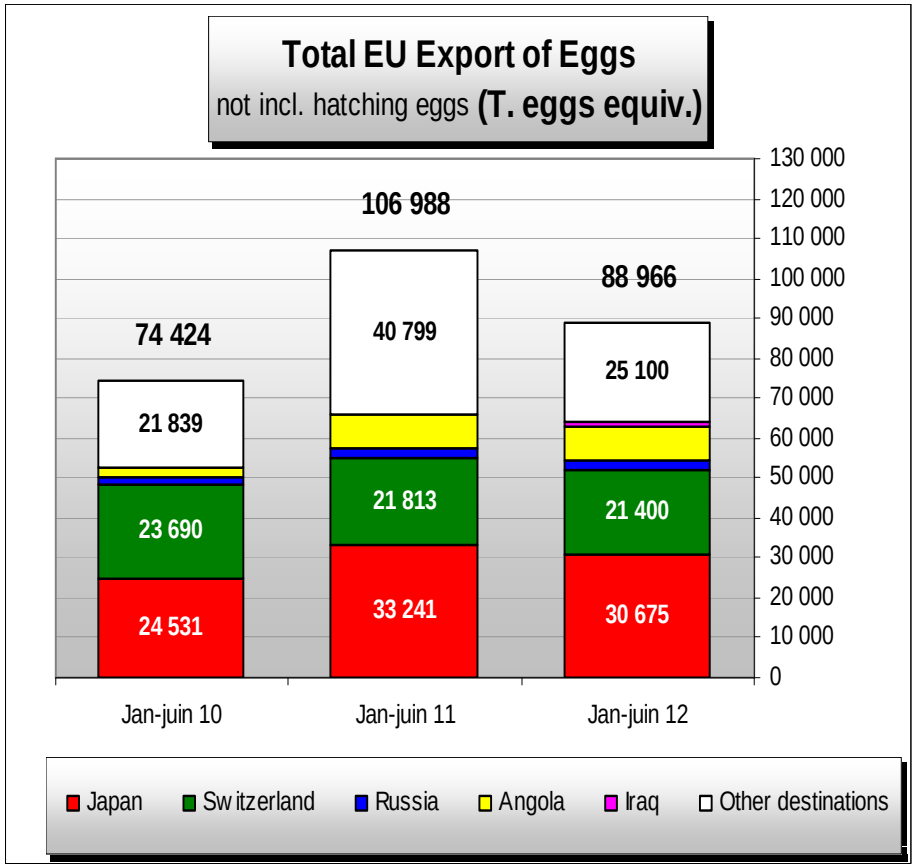

EU-27 Imports of selected EGGS products
(including Hatching eggs)
in Tonnes egg equiv.
8 000
7 000
6 000
5 000
4 000
3 000
2 000
1 000
0
2006
2007
2008
2009
2010
2011
Jan 06
Jan 07
Jan 08
Jan 09
Jan 10
Jan 11
Jan 12
FRESH
Albumin
Not In Shell
Yolk
Haching

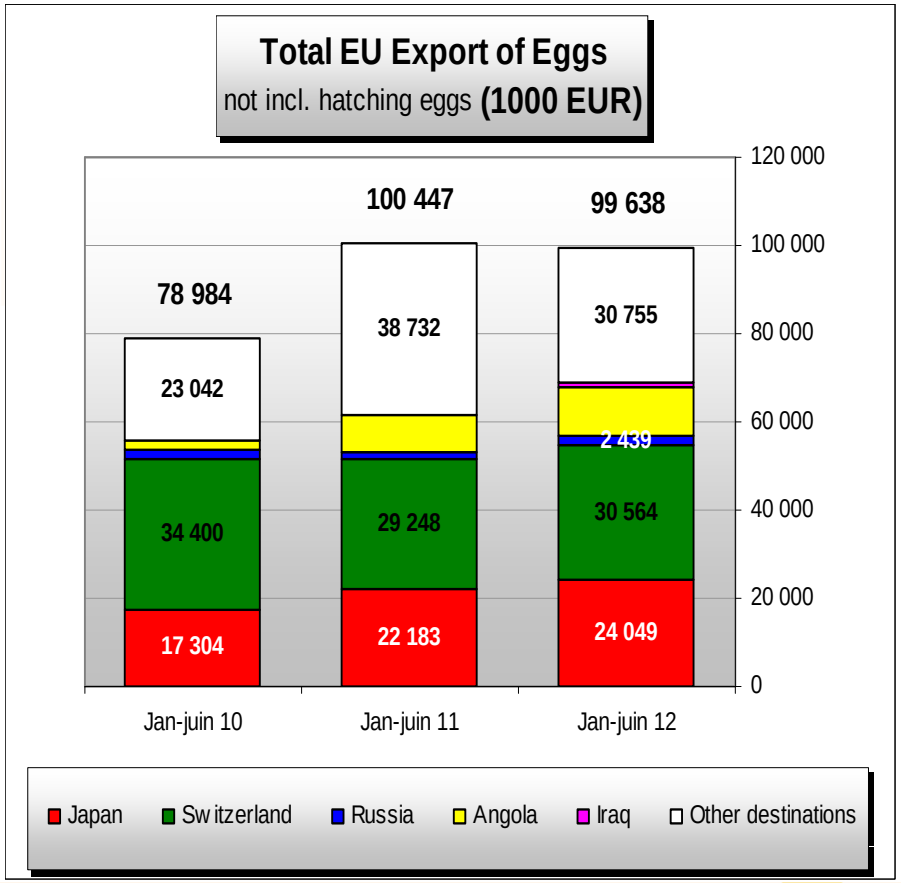
EU Exports of Eggs:

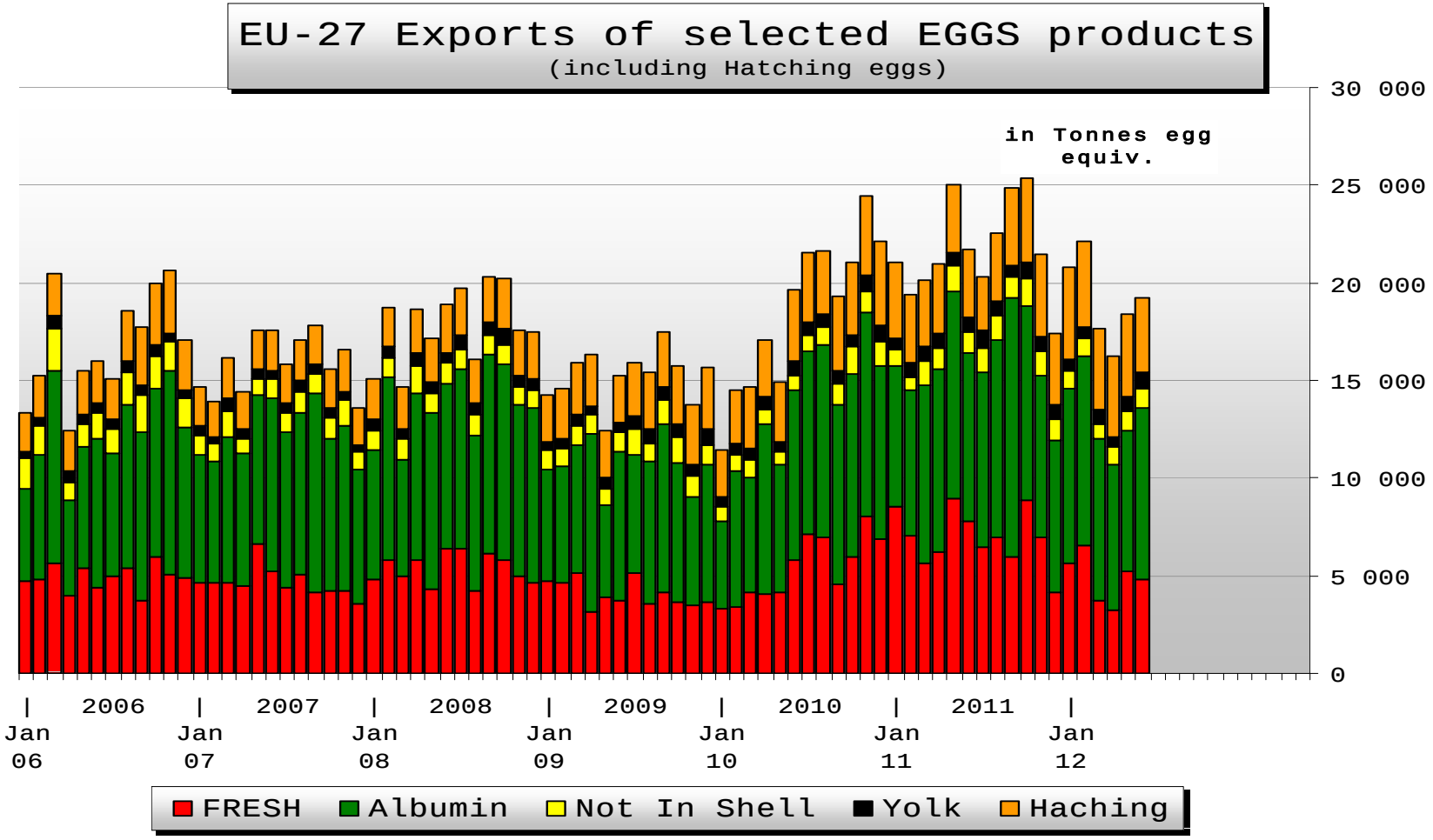
Trade Figures *(Comext – tonnes egg equiv.)* not incl. Hatching eggs

	2008		2009		2010		2011		Jan-juin 12		Compared
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%	to Jan-juin 11
Japan	62 254	33%	47 238	31%	52 923	29%	65 982	30%	30 675	34%	- 8%
Switzerland	44 229	24%	43 499	29%	45 107	25%	42 152	19%	21 400	24%	- 2%
Russia	7 113	4%	4 360	3%	5 293	3%	4 947	2%	2 527	3%	+ 10%
Angola	4 049	2%	4 019	3%	10 227	6%	17 498	8%	8 106	9%	- 8%
Libya	0	0%	40	0%	201	0%	226	0%	189	0%	
Thailand	6 190	3%	4 068	3%	6 180	3%	7 254	3%	3 073	3%	+ 4%
Ukraine	7 250	4%	4 304	3%	5 693	3%	4 422	2%	1 854	2%	- 4%
Taiwan	4 624	2%	2 868	2%	7 145	4%	7 941	4%	2 371	3%	- 24%
South Korea	1 859	1%	1 948	1%	2 495	1%	4 379	2%	1 638	2%	- 5%
U.A.Emirates	9 436	5%	2 664	2%	5 864	3%	8 262	4%	787	1%	- 84%
Norway	1 805	1%	963	1%	570	0%	1 300	1%	630	1%	+ 36%
Israel	6 002	3%	3 398	2%	1 308	1%	2 729	1%	523	1%	- 66%
EXTRA EU 25/27	187 209		150 173		181 682		216 447		88 966		
% change			- 20%		+ 21%		+ 19%		- 16.8%		

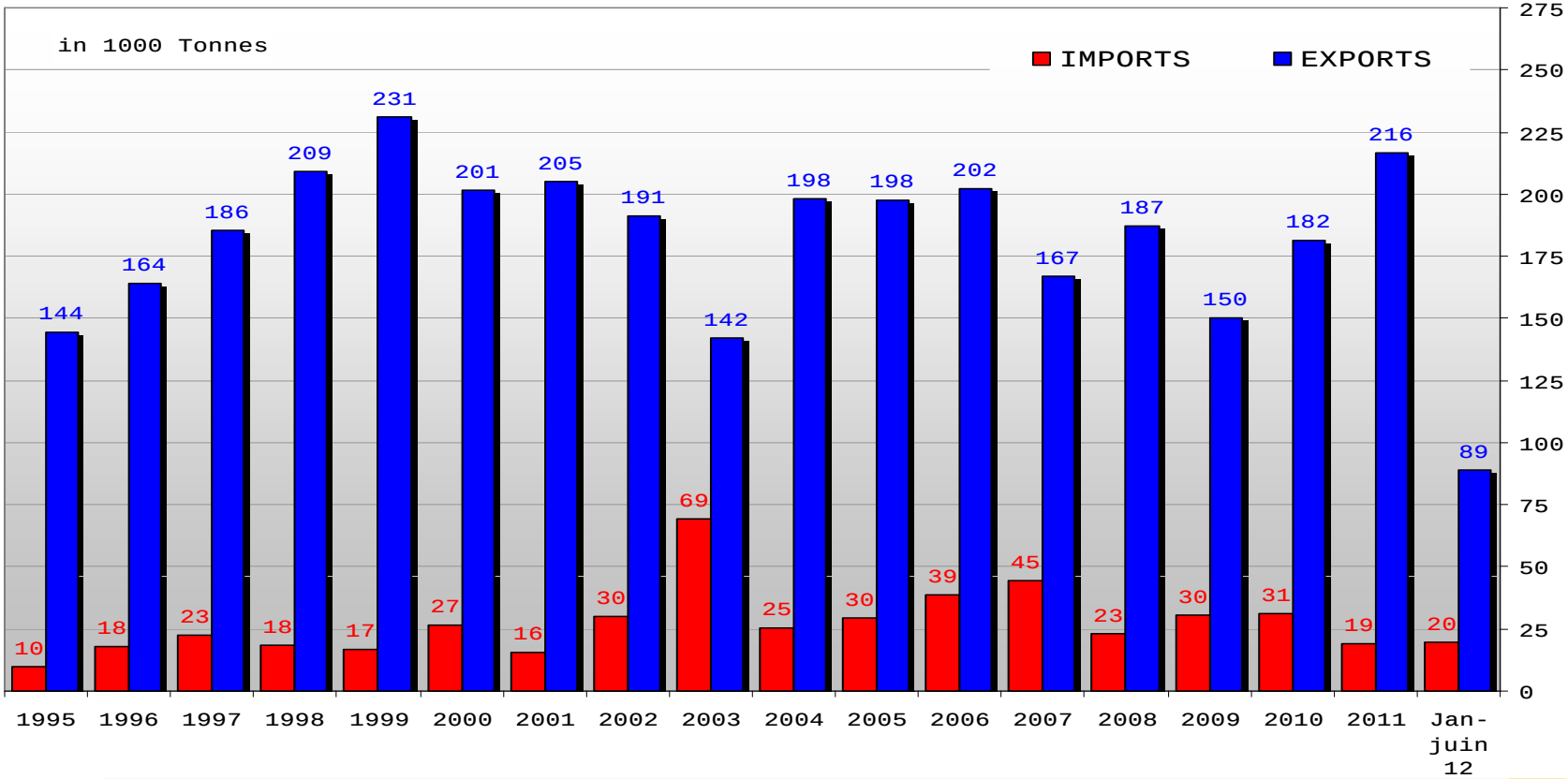
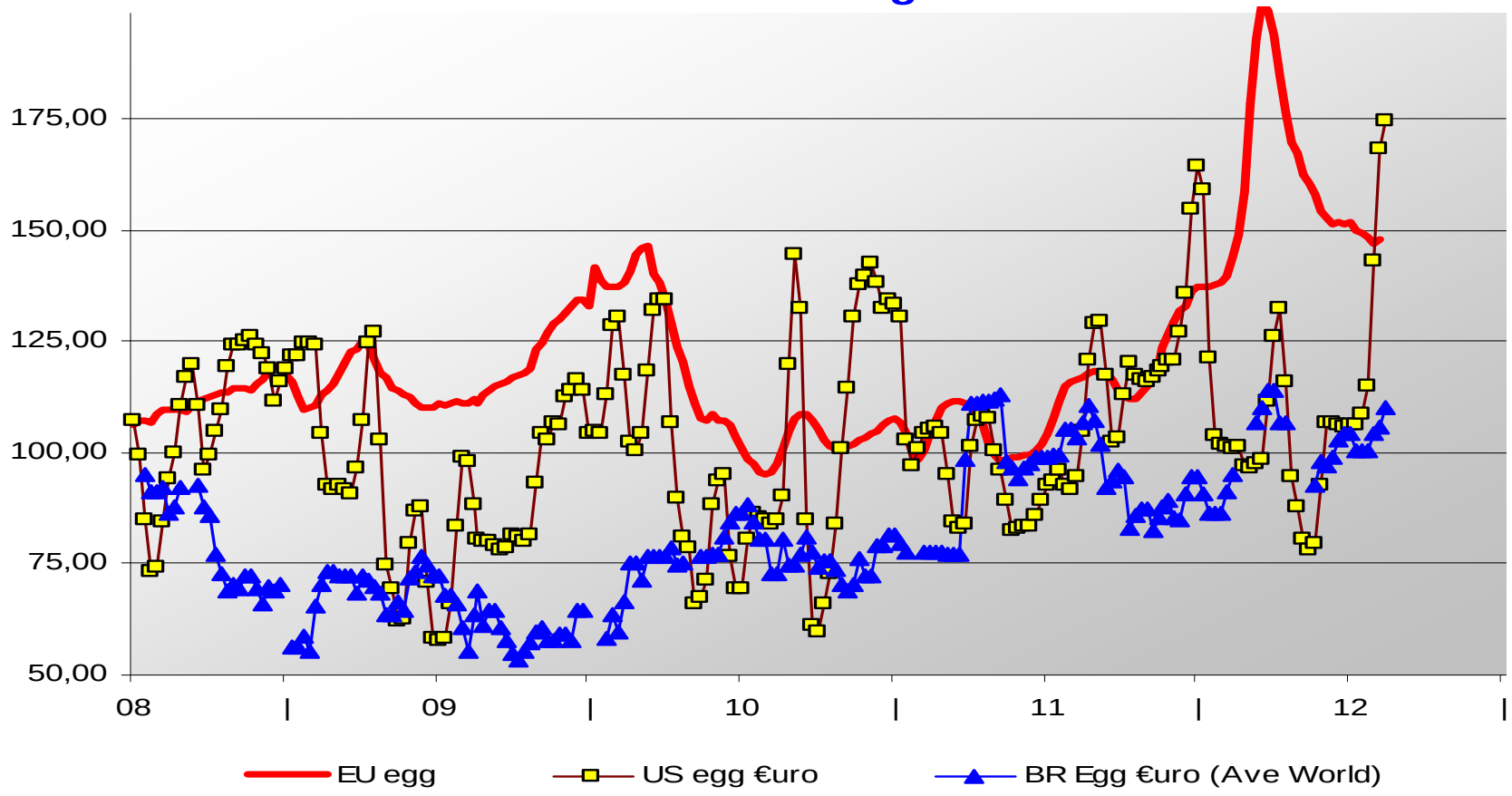
EU Egg Exports






EU-27 Exports of selected EGGS products
(including Hatching eggs)
in Tonnes egg equiv.
30 000
25 000
20 000
15 000
10 000
5 000
0
2006
2007
2008
2009
2010
2011
Jan 06
Jan 07
Jan 08
Jan 09
Jan 10
Jan 11
Jan 12
FRESH
Albumin
Not In Shell
Yolk
Haching

EU Egg Trade Balance (not including Hatching eggs)



Egg prices The EU, USAand Brazil in €uro/ 100kg