

Global poultry production – Situation and outlook

Craig Chibanda, Petra Thobe and Mohamad Isam Almadani

agri benchmark Poultry Network /Thuenen Institute



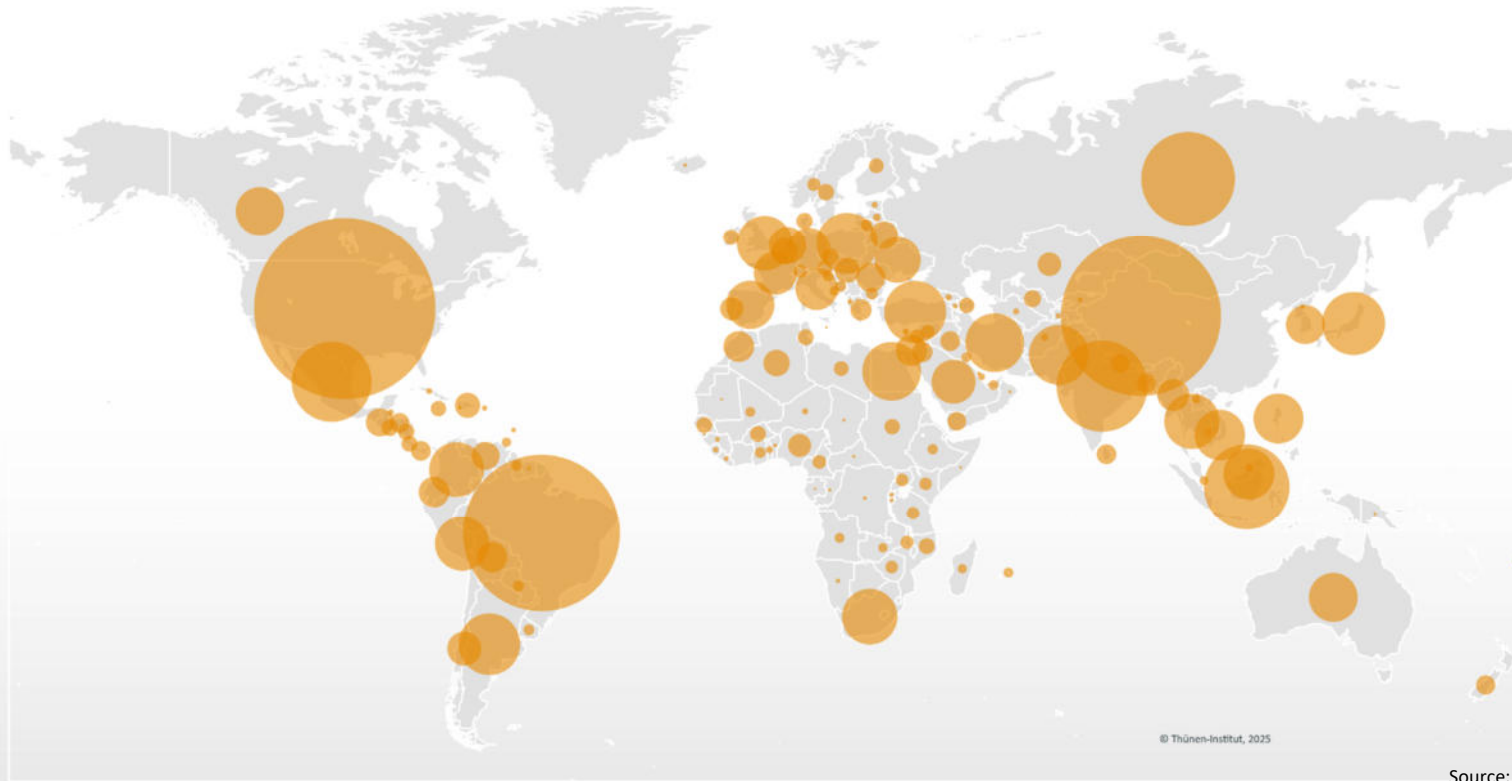
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- ▶ Economics of typical broiler farms in selected countries
- ▶ Emerging and concerning issues in the global poultry sector
- ▶ Projections of global poultry meat production, prices and consumption
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Trends in global poultry meat production, consumption and trade

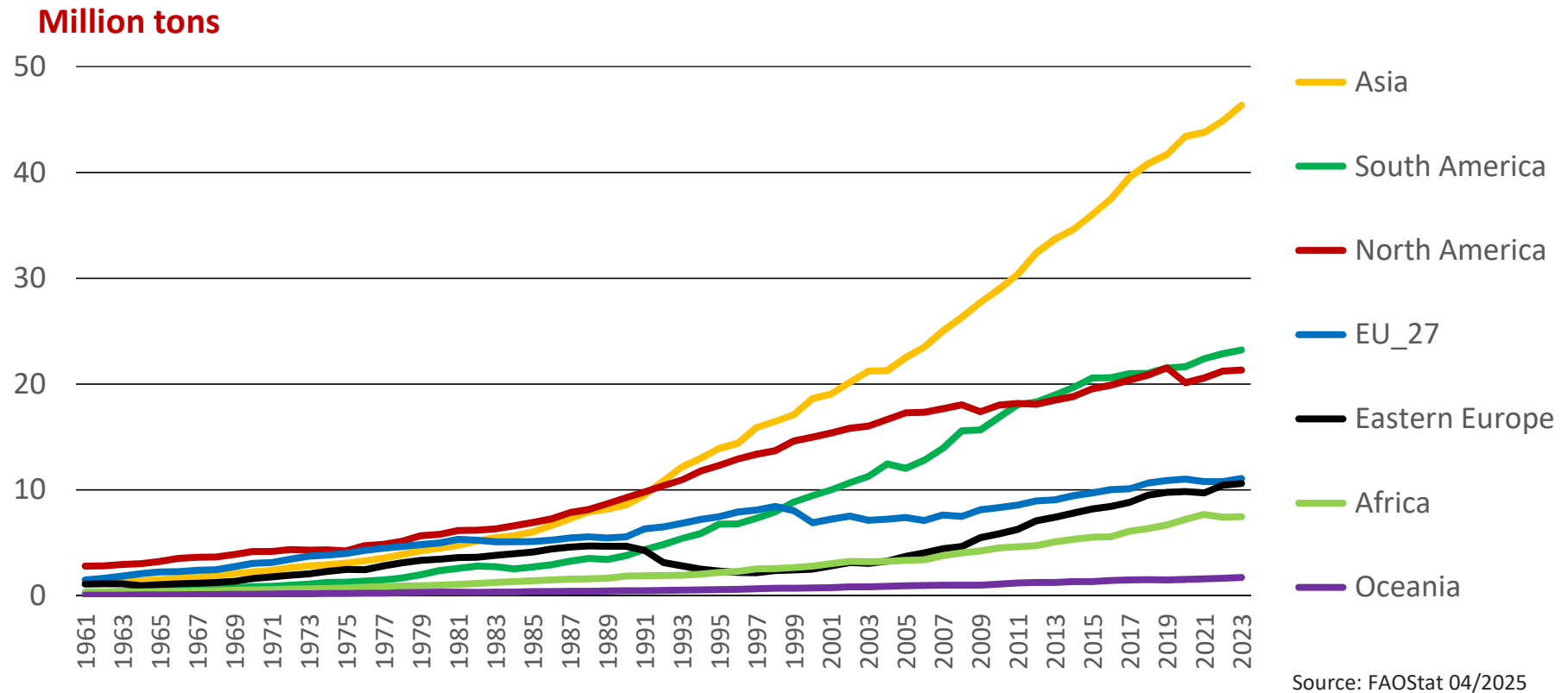


Global chicken meat production 2023 ('000 tons)

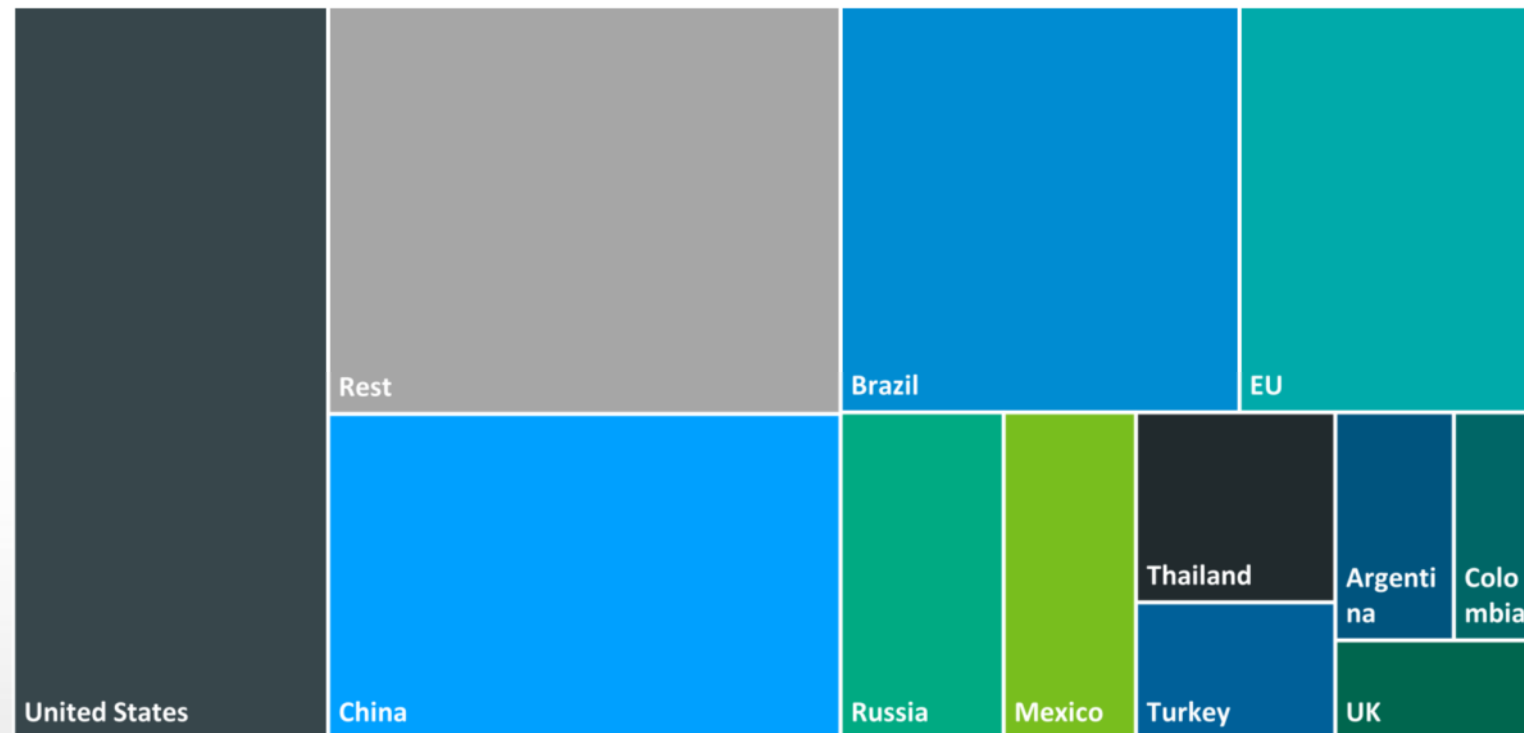


Source: FAOStat 03/2025

Development of chicken meat production from 1961 to 2023 (million tons)

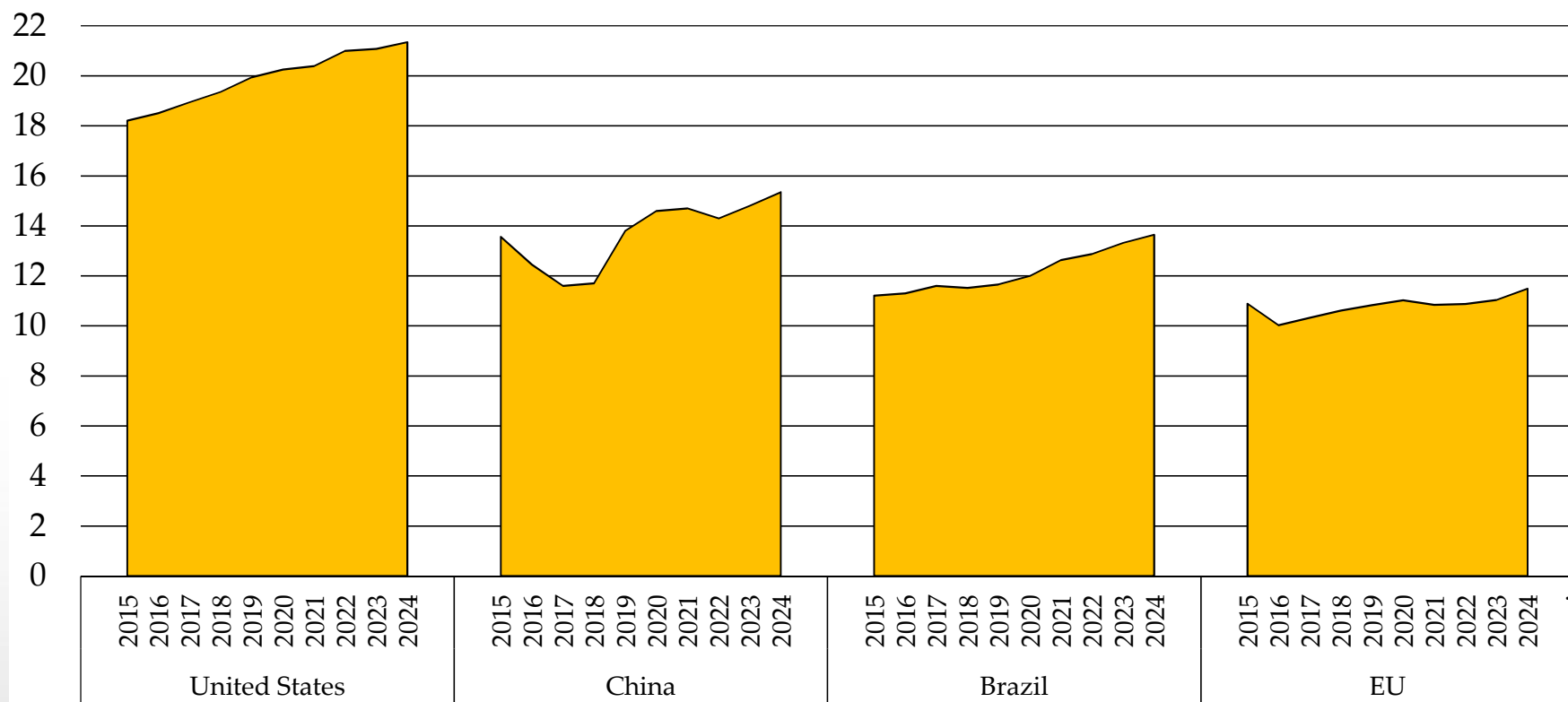


Key producers of chicken meat in 2024



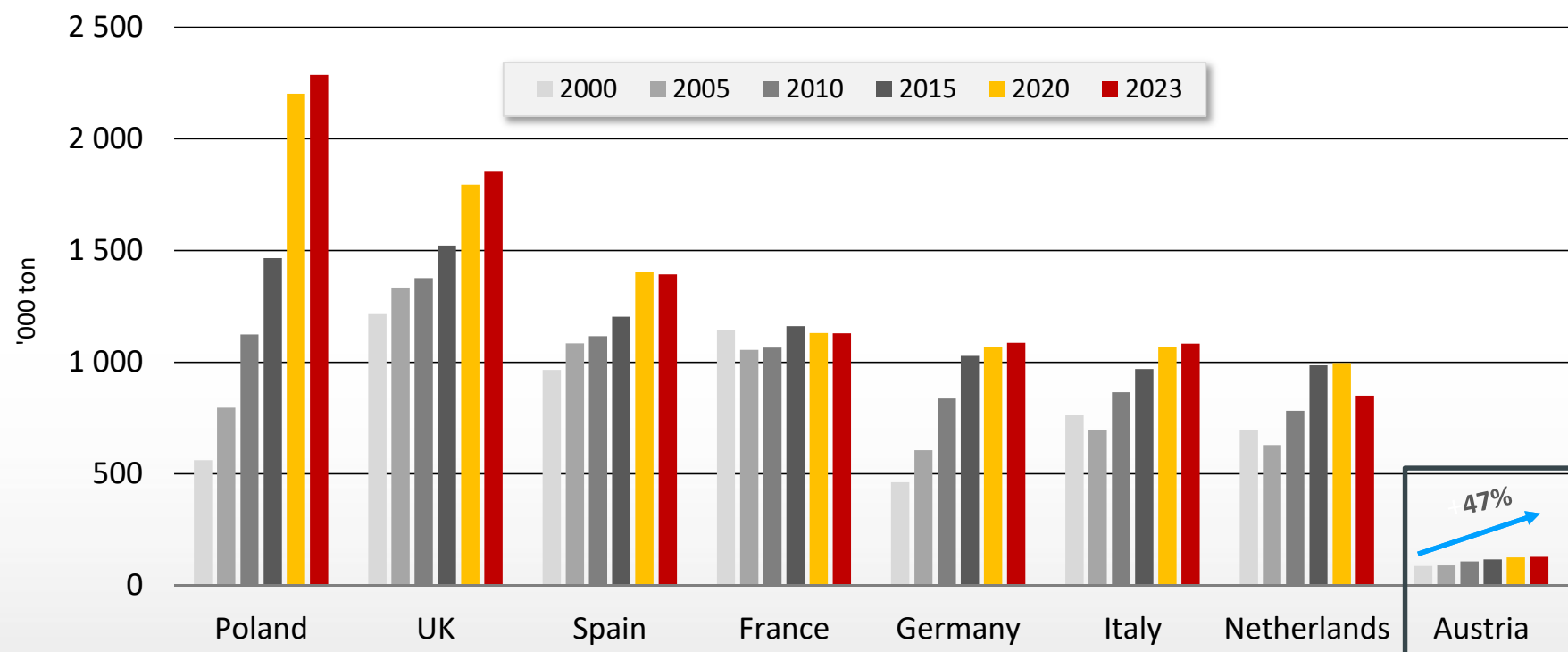
Source: PSD/FAS/USDA 06/2025

Evolution of chicken meat production in key producers 2015-2024 (million tons)



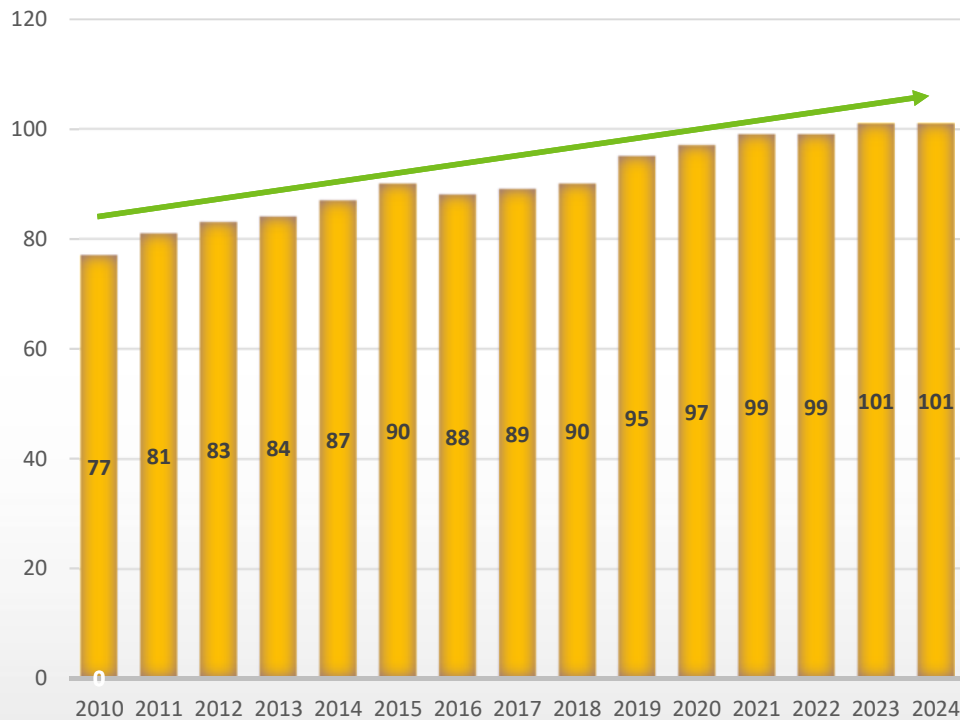
Source: PSD/FAS/USDA 06/2025

Production developments in the key EU producers + UK (2000-2022)



Source: FAO 06/2025

Global chicken meat consumption volume (million t cw)

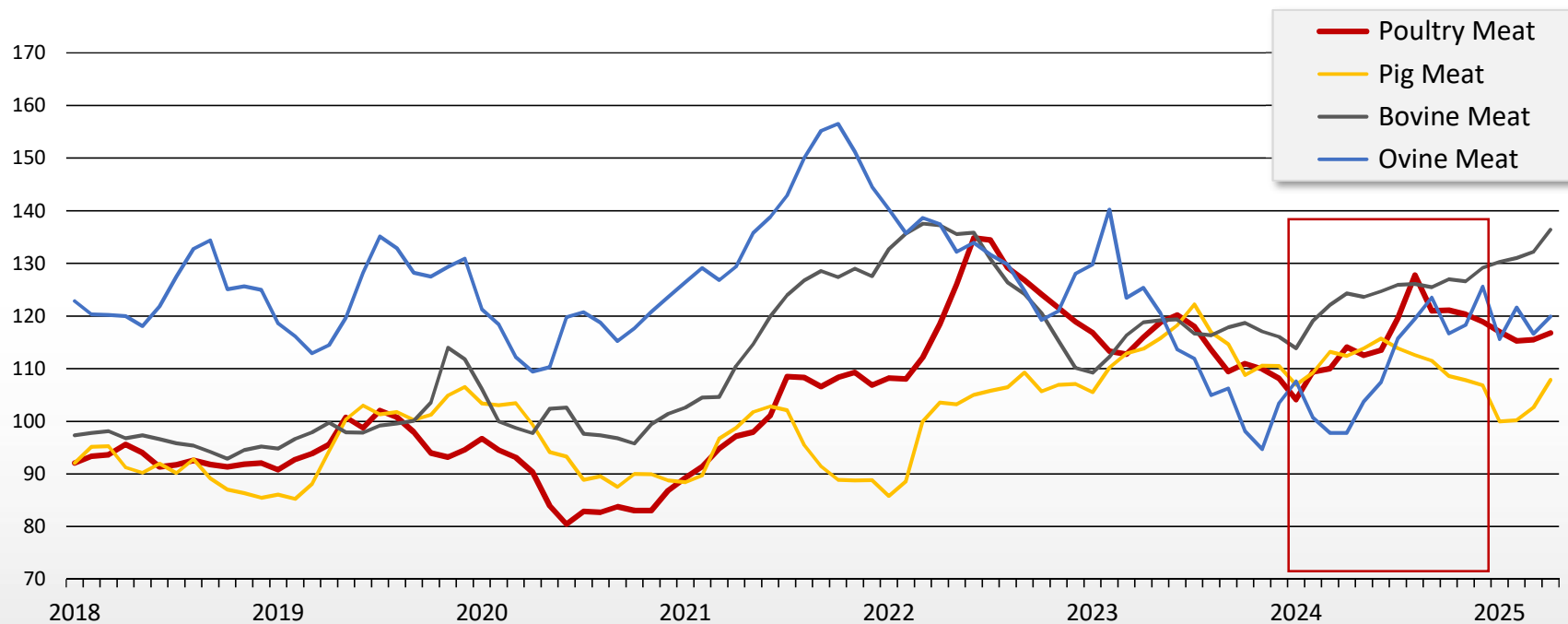


Source: PSD/FAS/USDA 06/2025

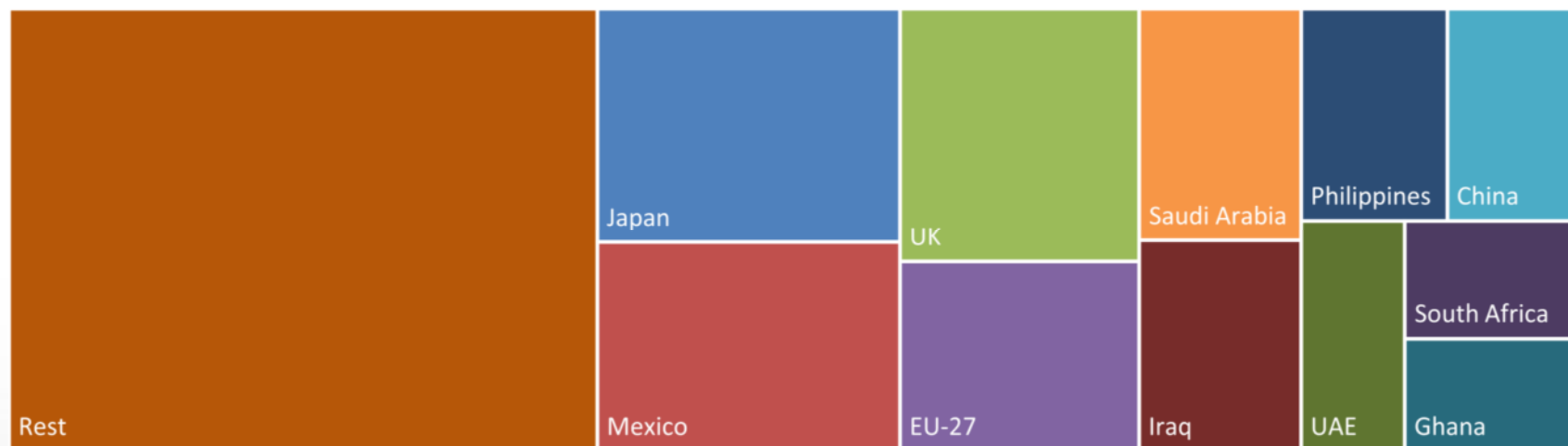
- Population growth, urbanization, and rising incomes.
- Shifts in consumer preferences.
- High prices of other meats (e.g. beef and lamb).

Poultry meat index prices kept the recent record levels Upward trend in '24 but slightly above '23 level

Based on USD per ton prices (until 04.25)

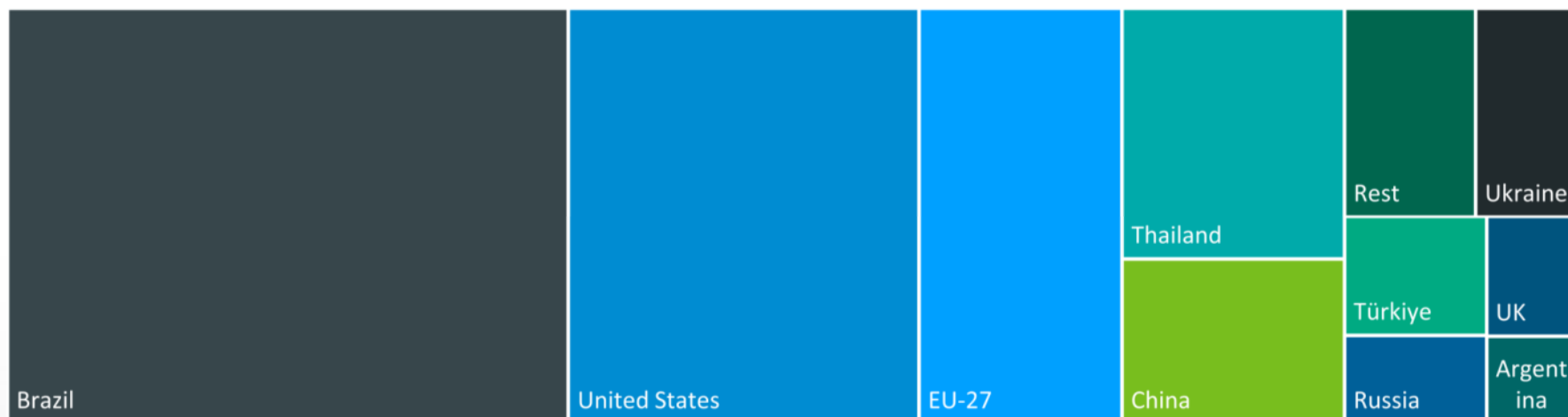


Market shares of major importers of global chicken meat imports in 2024



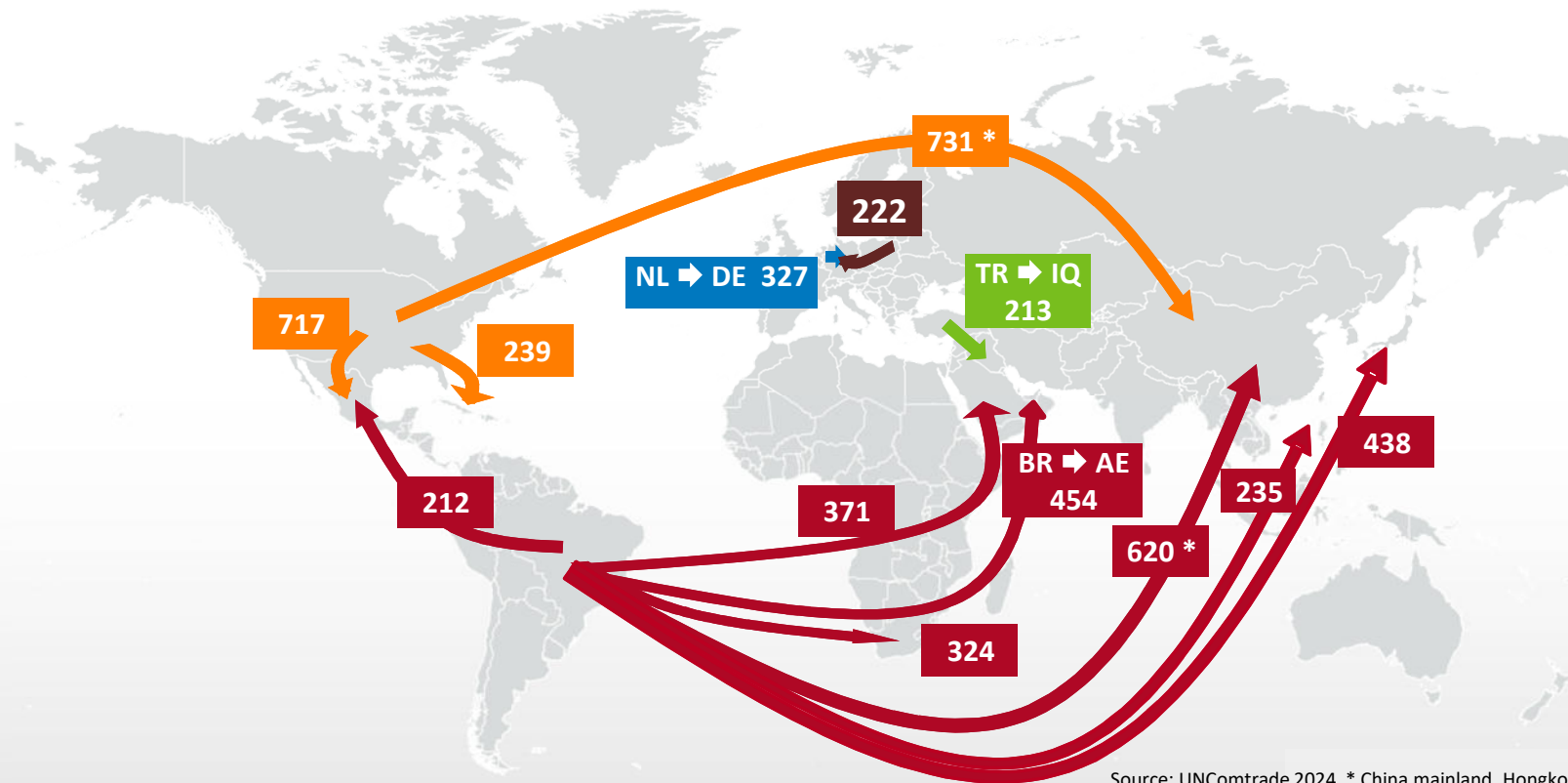
Source: PSD/FAS/USDA 06/2025

Market shares of major exporters in global chicken meat exports in 2024



Source: PSD/FAS/USDA 06/2025

Top 12 chicken meat trade export flows 2024 ('000 tons)



Source: UNComtrade 2024, * China mainland, Hongkong and Macao

Economics of typical conventional broiler farms in selected countries



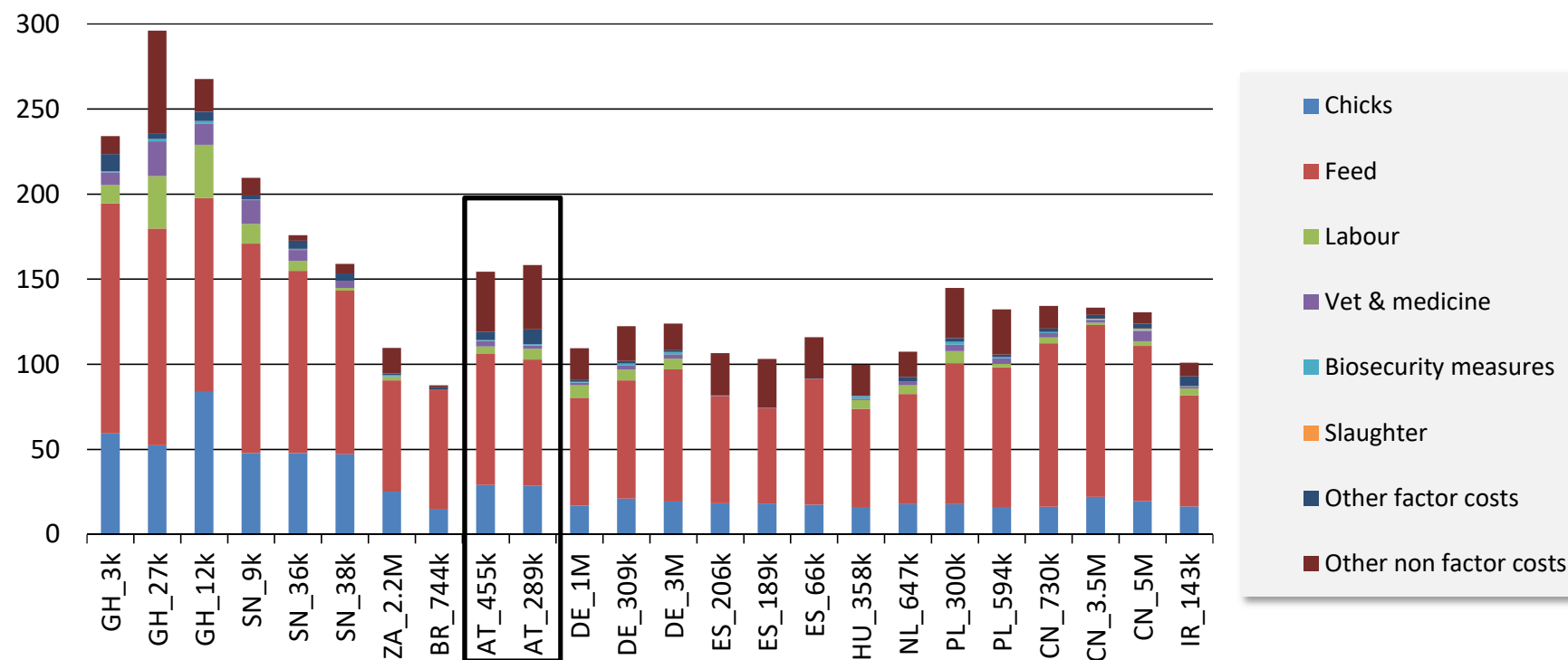
The *agri benchmark* Poultry Network



Typical broiler farms

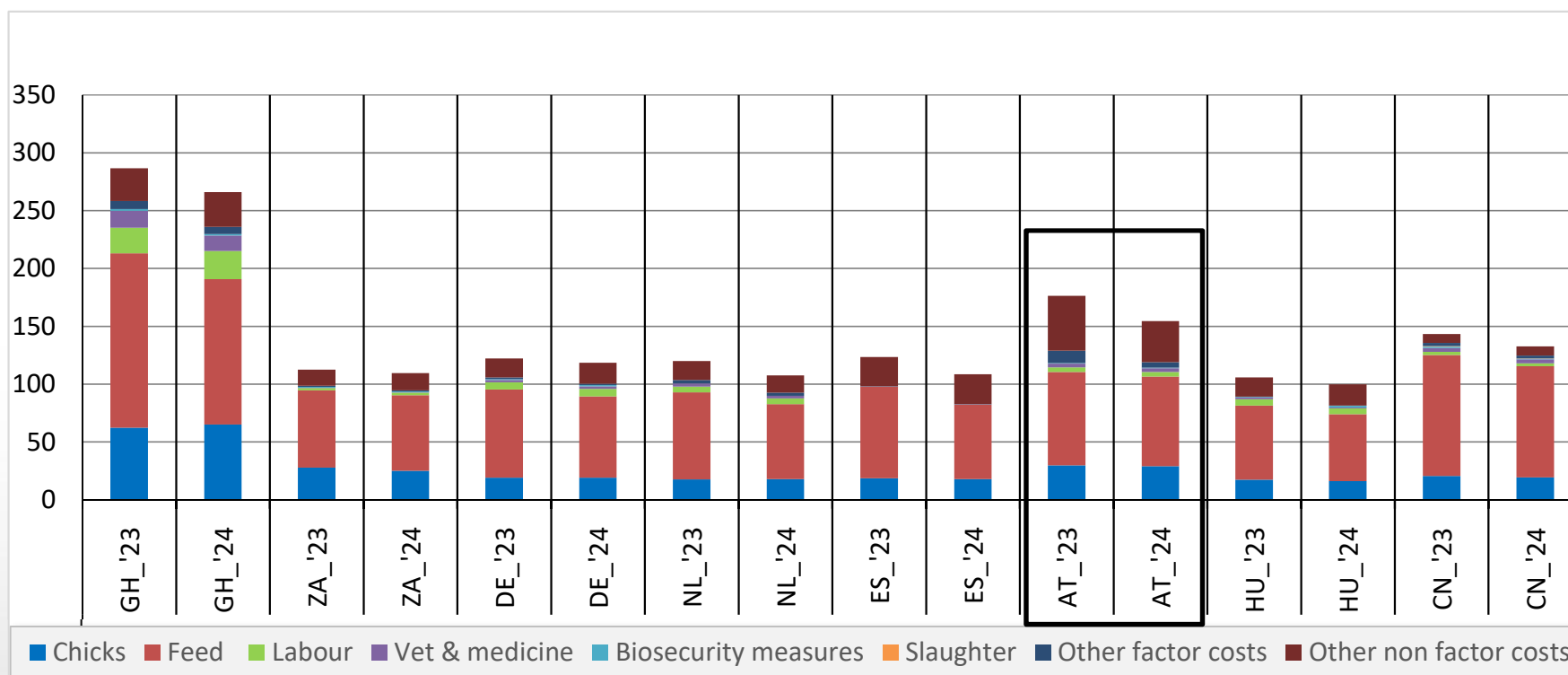
- Number of farms: **24**
- Number of countries: **12**

Comparison of production costs (USD /100 kg live weight) in 2024



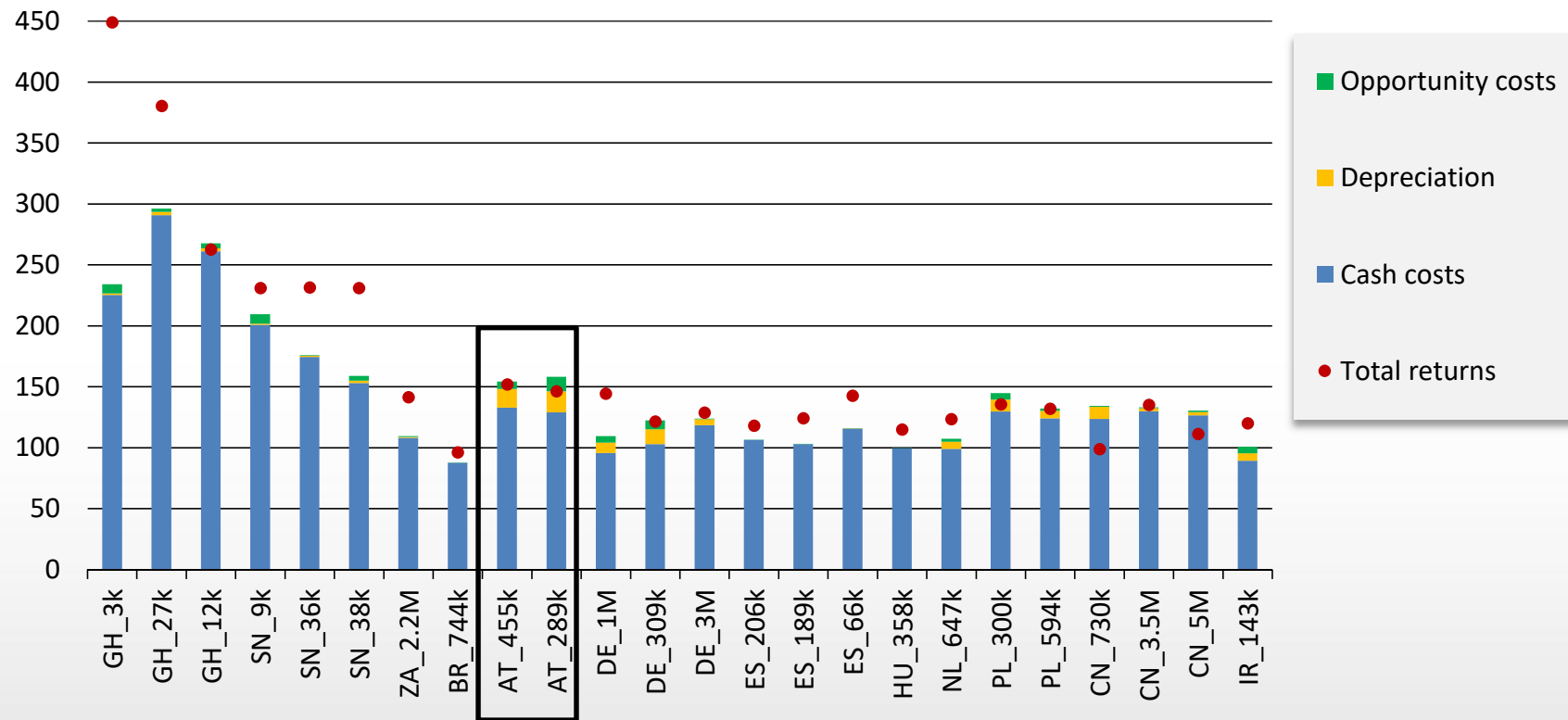
Source: Own calculations

Comparison of production costs (USD /100 kg live weight) in 2023 vs 2024



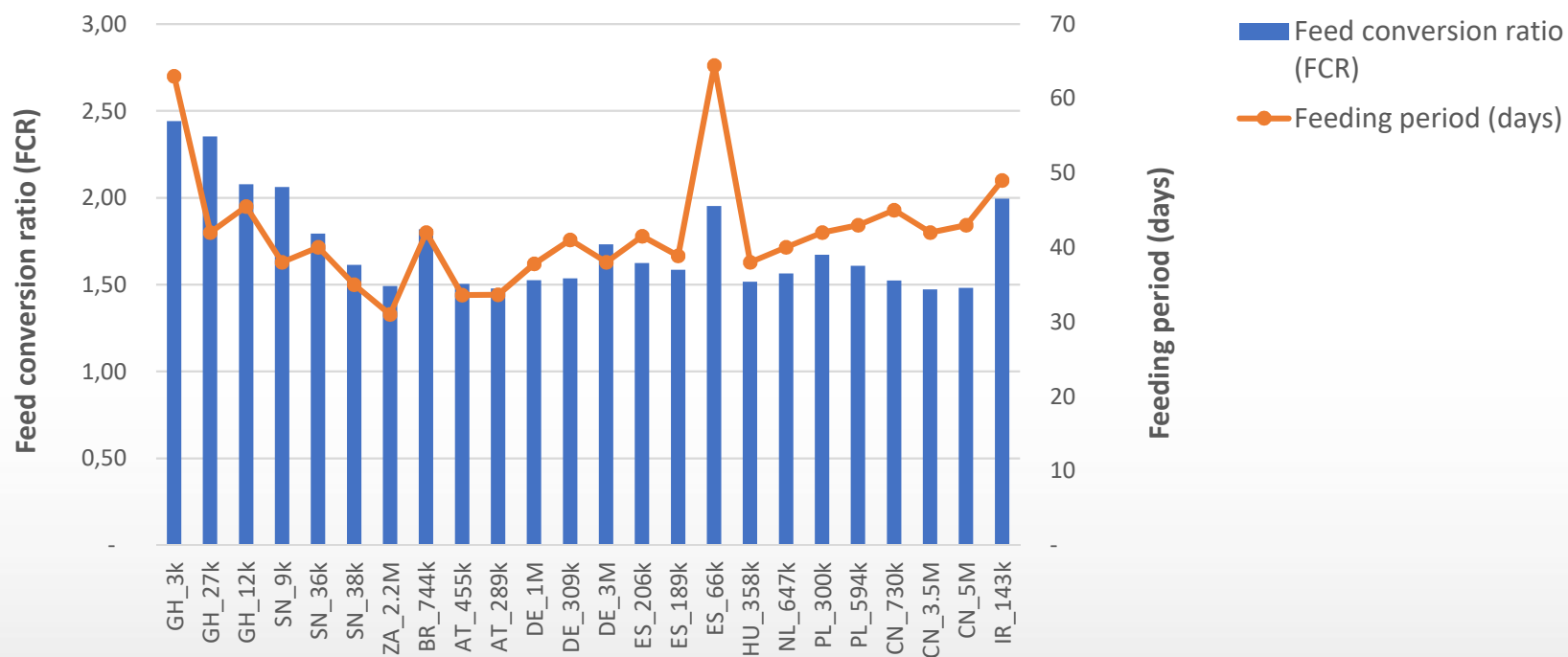
Source: Own calculations

Comparison of cash and non-cash costs, total returns and profitability (USD/100 kg LW) in 2024



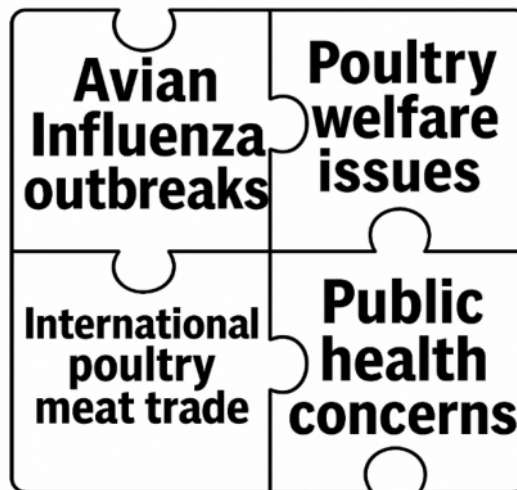
Source: Own calculations

Comparison of Feed Conversion Ratios (FCRs)

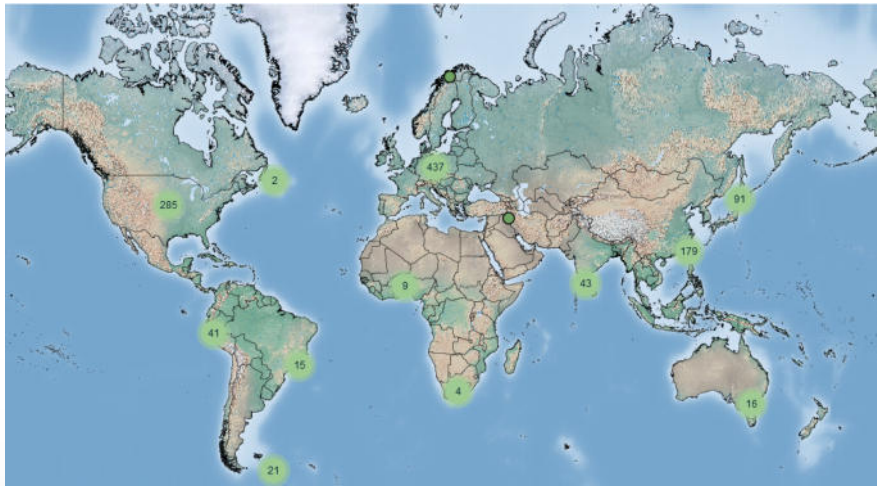


Source: Own calculations

Emerging and concerning issues in the global poultry meat sector



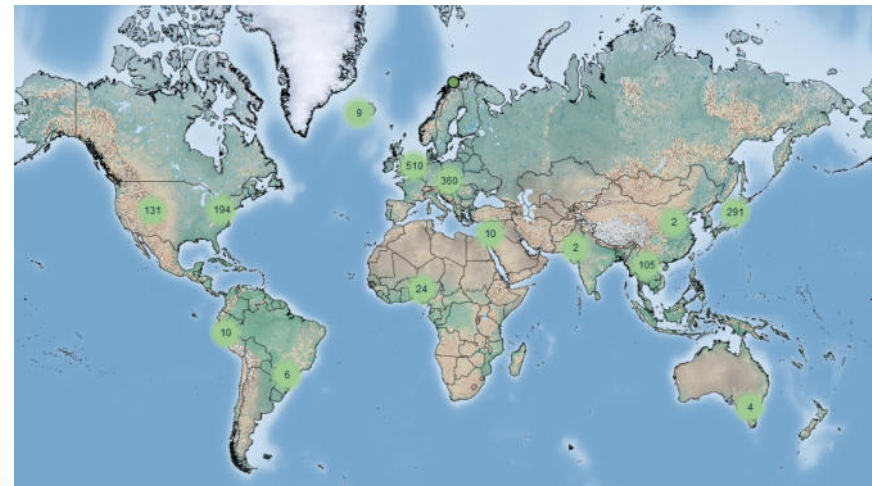
Avian Influenza outbreaks



Source: FAO Animal Health 05/2025

June 2024

- EU slowing coming out of a severe outbreak
- HPAI reached South America (Brazil, Argentina)
- H7N6 in South Africa



Source: FAO Animal Health 05/2025

June 2025

- EU has had a strong recovery from severe outbreaks in 2020-2023
- Easing of HPAI crisis in South Africa

Poultry welfare issues

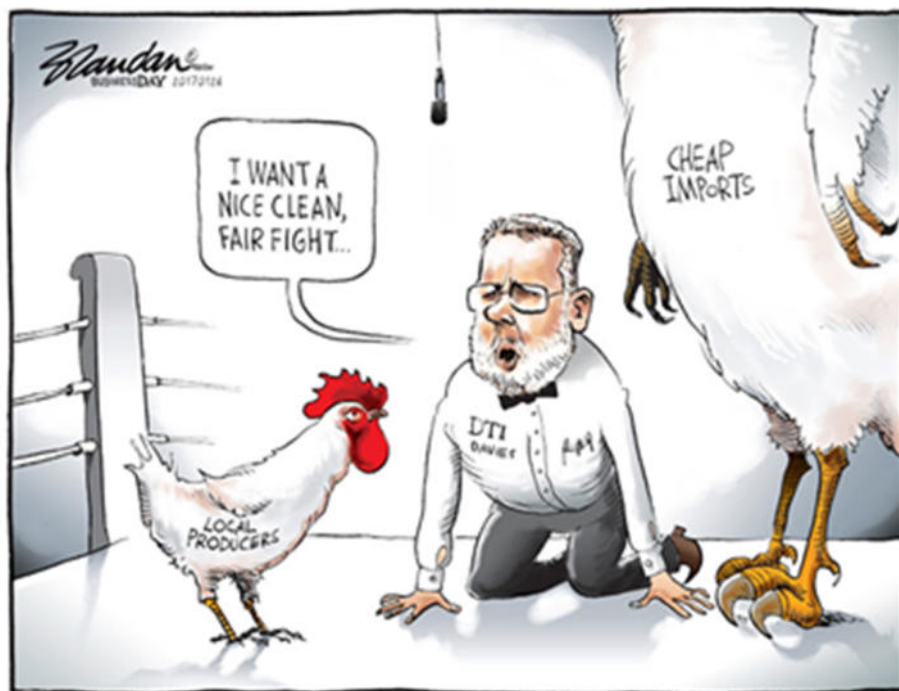


Source: <https://www.ciwf.com>

Animal welfare concerns related to:

- Rapid growth rates (lameness)
- High stocking density
- Bird catching methods
- Transport and slaughtering

International poultry meat trade



Brinkhuis et al. (2017)

- **Dumping Accusations:** Key exporters are often accused of dumping cheap chicken parts in African markets.
- **Trade Protectionism:** Some countries like Ghana and Senegal have restricted poultry imports.

Public health concerns



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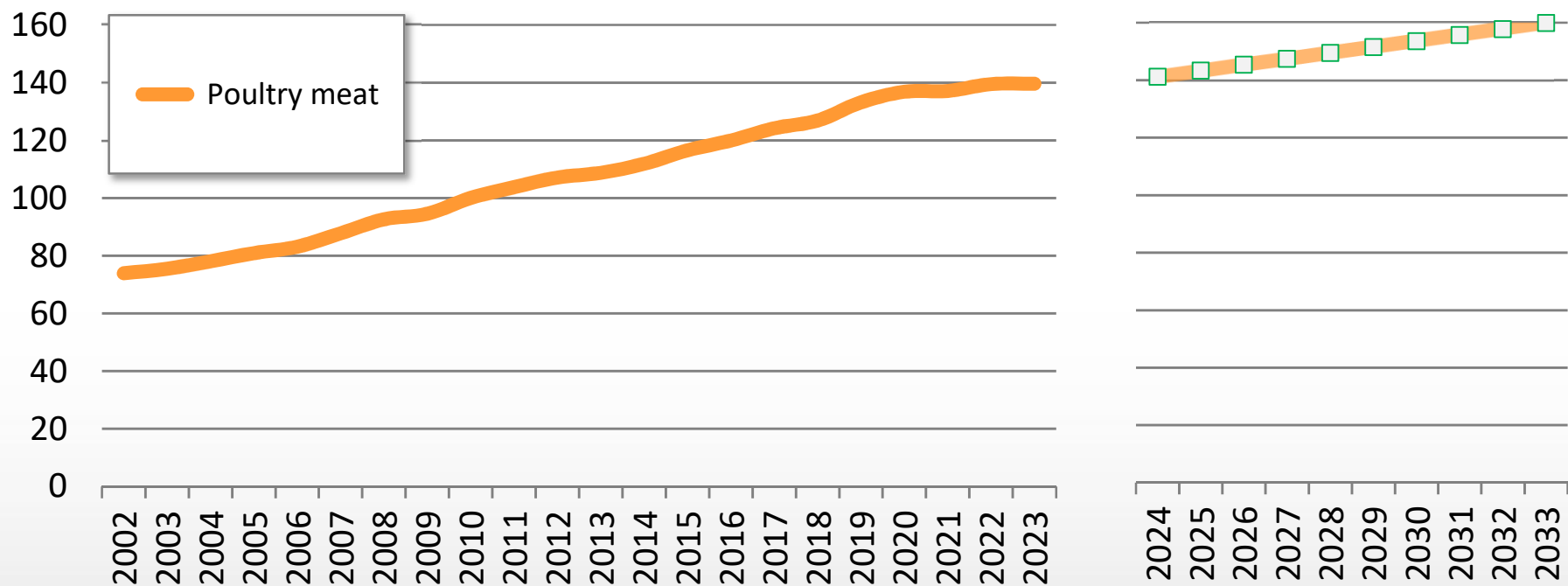
- **Zoonotic Disease Transmission:** Salmonella and Campylobacter.
- **Antimicrobial Resistance (AMR):** widespread and unregulated use of antibiotics in some countries.
- **Food Safety and Contamination**
- **Respiratory Risks:** Dust, feathers, and ammonia can affect both poultry workers and nearby communities.

Projections of global poultry meat production, prices and consumption



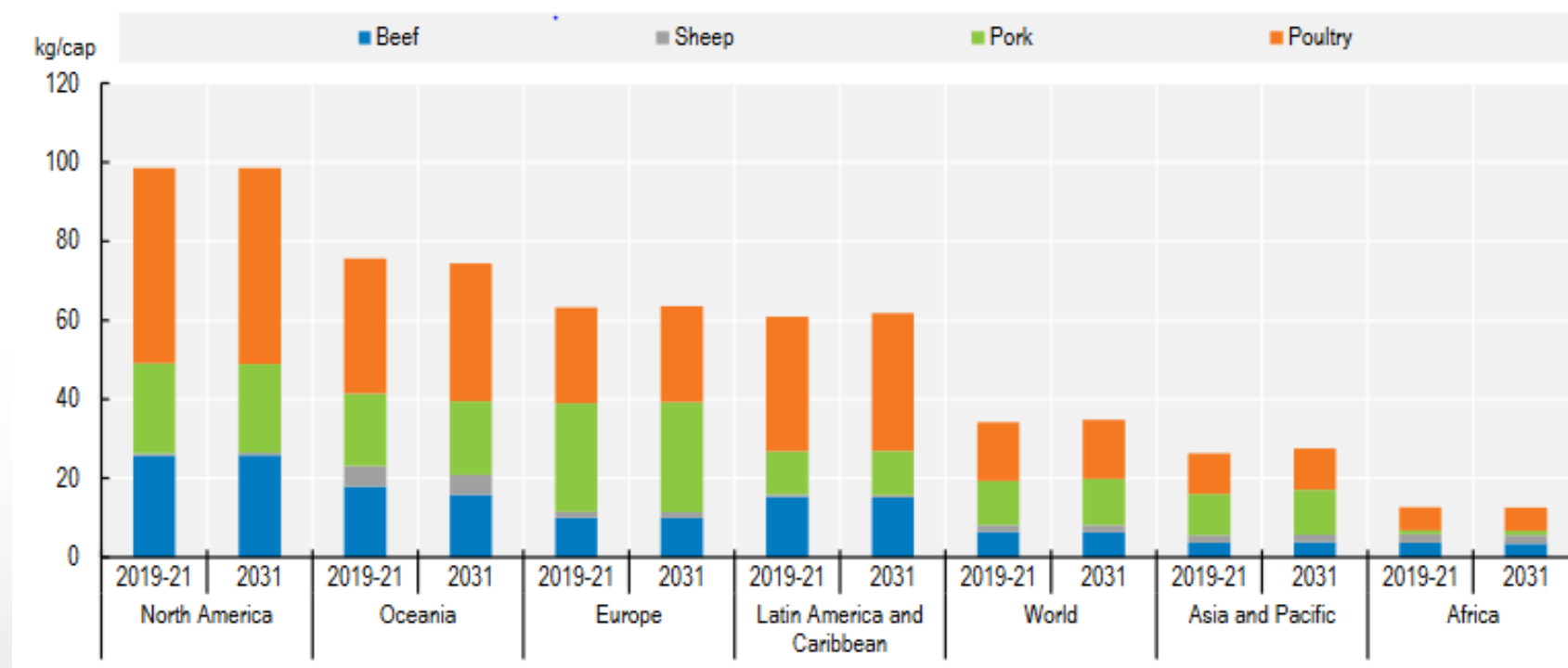
Global poultry meat production (FAO-OECD Outlook)

tons



Source: OECD / FAO Agricultural Outlook 2024-2033

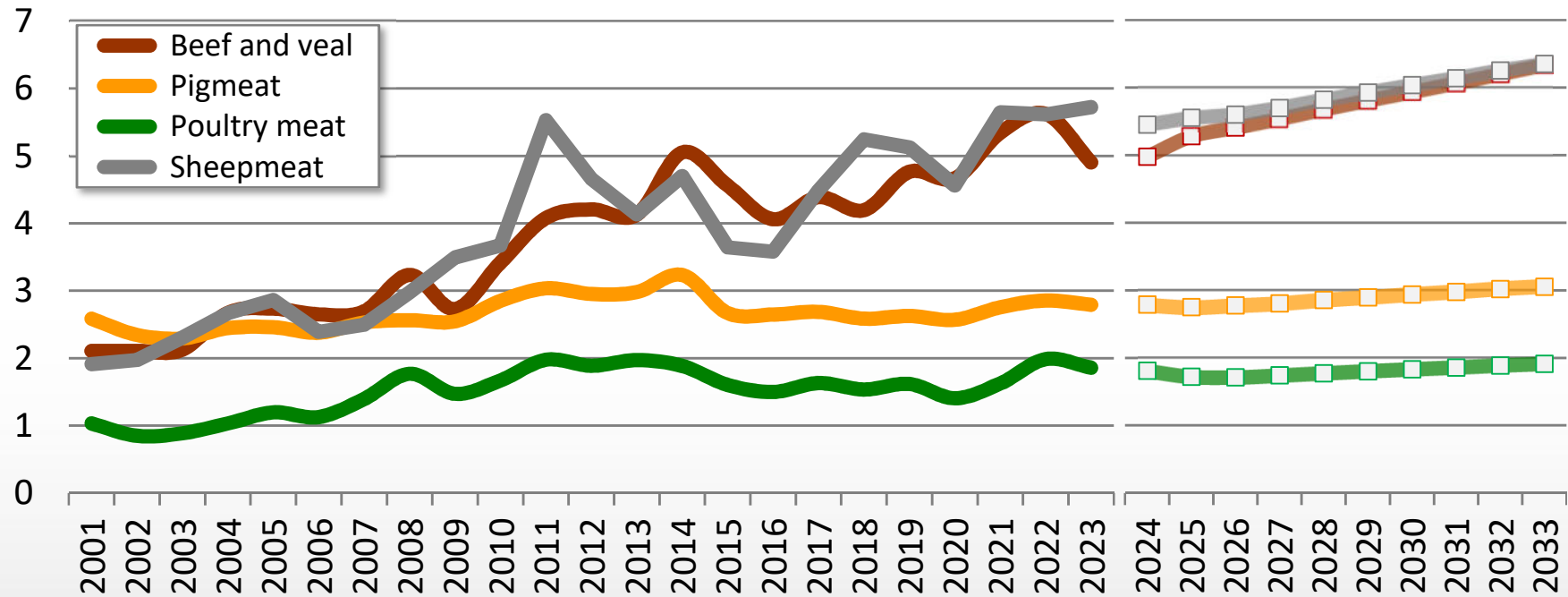
Current and projected meat consumption (Kg per capita)



Source: OECD / FAO Agricultural Outlook 2023-2032

Evolution of meat prices and future projections (FAO/OECD outlook)

1.000 USD per ton

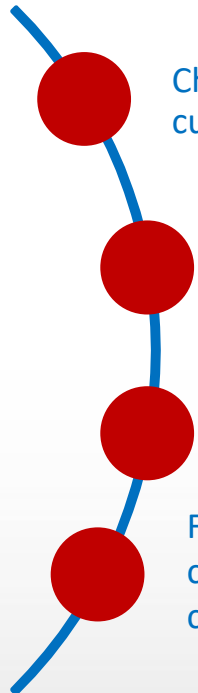


Source: OECD / FAO Agricultural Outlook 2024-2033

Summary and conclusions



Summary

- 
- Chicken meat production has shown a consistent upward trend across all regions, with Asia currently recording the highest production levels globally.
 - The outlook for chicken meat consumption remains positive, driven by shifting consumer preferences, its relative affordability, and rising income levels in countries across the Global South.
 - Production costs in 2024 have been slightly lower compared to 2023.
 - Factors such as disease outbreaks, animal welfare considerations, and public health concerns are expected to significantly influence patterns of production, consumption, and trade in the poultry sector.

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Craig Chibanda, Petra Thobe and Mohamad Isam Almadani

Thünen Institute of Farm Economics
Bundesallee 63
38116 Braunschweig

Tel.: +49-531-2570-2220
Fax: +49-531-596-5199
E-mail: craig.chibanda@thuenen.de
Internet: www.agribenchmark.org
www.thuenen.de/en/bw/