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## France

### Poultry and Products

### A Brief Overview of the French Poultry Sector

### 2005

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**Report Highlights:**

France is the largest poultry producer in Europe, with close to 13 percent of the EU chicken production, and 31 percent of the turkey production. But for the past five years, French poultry production has been steadily decreasing, driven by sluggish exports and stable domestic consumption. France is the fourth largest poultry exporter in the world (after the United States, China and Brazil). However, French exports of poultry meat to the EU and to third countries have fallen steadily for the past five years due to increased competition from other EU producers and new exporters such as Brazil. Overall, with domestic and export sales totaling 8 billion euros, the poultry industry accounts for 6 percent of the French food industry sales.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
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Note to readers: In light of the Avian Influenza threat, the intent of this report is to give the reader a brief overview of the French poultry sector and its economic weight. More reports will be published soon to discuss the impact of a potential Avian Influenza outbreak in related sectors such as the grain and oilseed sectors. Check the USDA / Foreign Agricultural Service website: [www.fas.usda.gov](http://www.fas.usda.gov) for more updates. For an overview of the European Union poultry sector, see GAIN report EU35142 dated 7/15/2005.

### Production

France is the largest poultry producer in Europe, with close to 13 percent of the EU chicken production, and 31 percent of the turkey production. In 2004, the French commercial poultry flock exceeded 260 million head, with a more diverse population than any other European country, including significant duck, guinea fowl and quail flocks. The duck flock is split evenly between ducks raised only for their meat, and ducks raised for fattening to produce "foie gras." More than 14,000 specialized farmers produce the bulk of the poultry, which is concentrated in the western part of France (Brittany and Pays de Loire regions account for 66 percent of the production), while the southwest regions are more specialized in duck and "foie gras" production.

French bird flocks at the end of the year :

Birds ('000 heads)	2003	2004
Hens	54,600	51,782
Chickens (- 16 weeks)	123,601	120,429
<b>Total Gallus</b>	<b>197,168</b>	<b>189,998</b>
Total Ducks	22,870	22,406
Turkeys	33,648	30,820
Geese	785	689
Guinea fowl	10,606	10,020
Quails	8,328	6,494
Pigeons	1,795	1,388

(Source French Ministry of Agriculture).

French poultry production per year (in '000 MT)

	2002	2003	2004
<b>All Poultry</b>	<b>2140</b>	<b>2016</b>	<b>1992</b>
Chicken	1044	1005	996
Turkey	697	631	619
Ducks	252	239	238
Guinea fowl	47	44	42
Others	100	97	96

(Source OFIVAL)

For the past five years, French poultry production has been steadily decreasing, driven by sluggish exports and stable domestic consumption. A significant share of the market (26 percent for chicken, 47 percent for guinea fowl) is poultry raised under official signs of quality such as "organic", "certified" or "red label". The "red-label" chicken (chicken aged over 81 days, raised outdoor and fed with vegetable feed and minerals) accounts for 16 percent of the chicken production (160,000 MT annually). The largest share of the production is sold as ready-to-cook whole birds.

"Foie Gras" production reached 16,400 MT in 2004, 97 percent of it made from duck liver. After several decades of growth, the production has now reached a peak and will only change marginally.

The French egg production of almost 1 million MT in-shell egg equivalent has remained stable over the years.

### Consumption

Poultry meat consumption amounts to 26 percent of all meat consumed in France. Consumption of poultry meat was estimated in 2004 at 23.4 kg per inhabitant per year, stable over the previous years, including 11.8 kg for chicken, 6.2 kg for turkey, 3.2 kg for duck and 0.6 kg for guinea fowl. According to various consumers' studies, sales of whole birds are declining while sales of cuts and processed products such as nuggets and poultry sausages are increasing sharply.

Egg consumption is estimated at 15.6 kg per inhabitant per year or 255 eggs per inhabitant per year. While egg consumption has shown slight growth over the past years, consumption of whole eggs decreased by about 1 percent annually and consumption of egg products in processed food and catering grew 4 percent annually.

### Trade

France is the fourth largest exporter of poultry meat and products in the world (after the United States, China and Brazil). In 2004, France exported 1 billion euros of poultry meat and products and imported 403 million euros worth of poultry. France's major European markets are United Kingdom, Germany, Spain and Belgium. Major third country markets are Saudi Arabia, United Arab Emirates and Russia. However, French exports of poultry meat to the EU and to third countries has declined steadily for the past five years due to increased competition from other EU producers and from new exporters such as Brazil. At the same time, French imports have grown steadily due to lower EU trade barriers and increased competitiveness from Brazil.

French Imports and exports of poultry products in 2004 (in '1000 MT)

	From the EU	From third countries	<b>Total Imports</b>	To the EU	To third countries	<b>Total Export</b>
Chicken	177	23	<b>200</b>	131	263	<b>395</b>
Turkey	20	7	<b>27</b>	161	103	<b>265</b>
Ducks	4	8	<b>12</b>	44	10	<b>54</b>
Guinea fowl	0.1		<b>0</b>	2	0	<b>2</b>

(Source OFIVAL)

In 2004, France also exported 4,200 MT of "foie gras" and "foie gras" products, worth 87 million euros, and imported 2,900 MT, mainly from Hungary and Bulgaria.

France has a net trade deficit in eggs: it imported 131,000 MT in-shell egg equivalent in 2004 but only exported 116,000 MT in-shell egg equivalent. However, since France exports more value-added egg products, in value, it exports more than it imports. Most of French imports of eggs and egg products come from the EU while about 20 to 25 percent of French exports go to third countries.

### Industry

The slaughtering and processing industry includes 170 companies employing more than 32,000 workers. However, the four largest companies (LDC, DOUX, GASTRONOME and ARRIVE) account for 56 percent of the sector's sales. Domestic sales of poultry meat and products to households amounted in 2004 to 5.2 billion euros, sales to restaurants and the catering sector amounted to 1 billion euros and sales to the processing industry amounted to 1.4 billion euros. Overall, the French poultry industry accounts for 6 percent of food industry sales.