

Germany Poultry Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Germany Poultry Meat Market size is estimated at 4.29 billion USD in 2025, and is expected to reach 4.39 billion USD by 2030, growing at a CAGR of 0.45% during the forecast period (2025-2030).

The expansion of retail outlets is driving the market's growth

- In the United Kingdom, the off-trade distribution channel is the primary channel through which poultry meat products are consumed most. Of all the sub-types of the off-trade channel, supermarkets and hypermarkets are the major channels. Supermarkets held the largest market share of 64.2% by value in 2022. The growth of these retail formats, along with factors like business expansion and the increase in supermarkets and hypermarkets, positively impacted the poultry products market in the United Kingdom. With the popularity of the discounters, the grocery retail market was dominated by Tesco, Sainsbury's, Asda, and Morrisons supermarkets. In 2022, Tesco was the largest retailer in the United Kingdom, with a market share of 27.5%, followed by Sainsbury's with 15.2%.
- Poultry meat dishes in UK restaurants, including chicken wings, nuggets, and lollipops, are popular in the country. Poultry meat consumption registered a sales growth of 16.85% by value from 2018 to 2022 through the on-trade channel, owing to the high meat consumption in the country. Special recipes and tastes of popular fast-food chains like McDonald's, KFC, and Subway are preferred by consumers, affecting sales positively. As of 2022, the United Kingdom had the highest number of Subway restaurants in Europe, with 2,209 locations.
- In the off-trade channel, online channels are the fastest-growing segment of the market. It is projected to register a CAGR of 6.39% during the forecast period. Thus, an increasing number of online grocery shops in response to the rising number of internet users is anticipated to drive online sales of dairy products during the forecast period. As of 2022, only 13% of grocery shopping

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was done online in the United Kingdom.

Germany Poultry Meat Market Trends

Chicken accounts for 90% of the country's poultry population

- Poultry production in Germany experienced a slight decline of 2.52% in growth in 2022 compared to the previous year. In 2022, the poultry population in Germany constituted 90% laying hens and broiler chickens. The turkey accounts for most of the remaining population, followed by ducks with approximately two million animals. Goose farming in Germany is limited to selling St. Martin's Goose or Christmas goose, while guinea fowl, ostrich, pheasant, quail, and pigeon are only present in a minimal number.
- Compared to broilers, turkeys, or Peking ducks, the economic situation of chicken meat production in Germany shows considerable advantages for broilers compared to other poultry species regarding cultivable land, overall margin, and per working hour earnings. Lower Saxony has a dominant position in poultry farming. Every second chicken in Lower Saxony is kept on a poultry farm. Turkey and duck farming also dominate in Lower Saxony, with 40% of each being held in farms.
- Intensive breeding programs conducted in Germany refined specific characteristics of chickens, leading to the emergence of various breeds of chickens, including the Augsburg, the Bergische, the Bielefeld, the German Langshane, and the Lohmann Brown chicken. As environmental concerns become increasingly acute, the German government has been investing in projects like "GreenChicken," which seeks to improve the economics of on-farm operations by providing organic chicken with environmentally and climatologically friendly feed. Expanding processing facilities contributes to increased broiler meat production, resulting in self-sufficiency, while turkey and Pekin ducks met only 76% and 86.5% of domestic demand in 2022, respectively.

Inflation in the country is leading to a rise in consumer prices, including poultry

- The poultry prices in Germany rose by 8.23% from 2017 to 2022. Germany's inflation rate was 6.4% in June 2023, compared with 6.1% in May 2023. The inflation rate increased slightly in June 2023 after declining for three consecutive months. Poultry prices were 25% higher in March 2023 than in March 2022, driven by chicken prices (+19.3%).
- The increase in poultry prices across the country is primarily attributed to the increasing cost of production. As a result, poultry farmers face considerable financial difficulties due to increased feed and energy costs. This has resulted in a rise in the retail price of poultry meat. According to the Central Association of the German Poultry Industry (ZDG), poultry meat may become scarce in supermarkets if producers cannot afford their produce fare. The cost of feed has doubled, while the cost of gas has nearly tripled in the context of the ongoing Russia-Ukraine conflict. To balance the cost of production, producer prices increased from USD 1.00/kg to USD 1.60/kg for chicken and from USD 1.58/kg to USD 2.20/kg for turkey meat. As of 2022, one in five turkey houses in the country were empty due to higher production costs.
- The price of broiler chicken weighing 2,000 g was USD 1.28/kg in May 2023, which was USD 1.26/kg in May 2022. For slaughter, hens weighed 1,700-1,900 g, and the average price was USD 0.26 in May 2023, whereas in May 2022, it was USD 0.33. Similarly, for turkey hens weighing 9.5 kg, the prices were USD 1.84/kg in May 2023 and USD 1.62/kg in May 2022. Turkey roosters of 18.5 kg were priced at USD 1.85/kg and USD 1.65/kg in May 2023 and 2022, respectively.

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Germany Poultry Meat Industry Overview

The Germany Poultry Meat Market is fragmented, with the top five companies occupying 29.59%. The major players in this market are Lambert Dodard Chancereul (LDC) Group, PHW Group, Plukon Food Group, Sprehe Geflugel und Tiefkuhlfeinkost Handels GmbH & Co. Kommanditgesellschaft and Vion Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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