The German Poultry Market

Consumption per capita, kg

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Slaughterings, 1,000 t Carcass Weight</th>
<th>Consumption, 1,000 t Carcass Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1.449</td>
<td>1.558</td>
</tr>
<tr>
<td>2012</td>
<td>1.452</td>
<td>1.528</td>
</tr>
<tr>
<td>2013</td>
<td>1.481</td>
<td>1.565</td>
</tr>
<tr>
<td>2014</td>
<td>1.551</td>
<td>1.581</td>
</tr>
<tr>
<td>2015</td>
<td>1.544</td>
<td>1.637</td>
</tr>
<tr>
<td>2016</td>
<td>1.549</td>
<td>1.721</td>
</tr>
</tbody>
</table>

Source: MEG, BLE.
Origin of German Imports of Poultry Meat

- Netherlands: 37%
- Poland: 20%
- France: 7%
- UK: 5%
- Hungary: 5%
- Italy: 6%
- other EU: 8%
- Brazil: 3%
- other third countries: 4%

Additionally, import of 174,693 t preparations, 35% from Brasil and import of 50,304 t salted meat, 53% from Brasil.

Import of Poultry Meat total: 648,323 Tonnen (preliminary)

Source: MEG according
Destinations of German Export from Poultry Meat 2016

- Netherlands: 25%
- Other EU: 30%
- UK: 2%
- France: 10%
- Denmark: 9%
- Austria: 8%
- third countries: 13%
- Export of 177,179 t preparations, an export of 6,895 t salted meat

Export of Poultry Meat total: 481,824 Tonnen (preliminary)

Source: MEG according Destatis.
Per Capitata Consumption of Poultry Meat in Germany

in kg

Source: BLE, MEG.
Percentage of Poultry Meat in Total Meat Consumption, %

- BSE-crisis in Germany
- AI reached Germany
- 23,8

Source: MEG according BLE, AMI, VTI.

p. = preliminary
Percentage of fresh Meat of Broiler Slaughter in Germany

- **2000**: 56.3% fresh, 43.7% other
- **2005**: 62.3% fresh, 37.7% other
- **2010**: 68.4% fresh, 31.6% other
- **2015**: 77.2% fresh, 22.8% other
- **2016**: 81.3% fresh, 18.7% other
- **I - VII 2017**: 81.4% fresh, 18.6% other

*Source: MEG according Destatis.*
Allocation of Purchases of Poultry Meat 2017 in %

- Broiler fresh: 49%
- Turkey fresh: 20%
- Broiler frozen: 19%
- Turkey frozen: 1%
- Duck fresh: 2%
- Duck frozen: 3%
- Others: 6%

Purchases 2016 total: 426,407 t

Source: GfK
Household Purchases of Poultry Meat, %-allocation of Retailers in Germany


Broiler - fresh 33,7 38,7 28,1 30,0 36,9 38,7
Broiler - frozen 19,2 18,7 25,3 24,2 16,4 16,1
Turkey - fresh 11,0 10,5 5,1 4,4 10,4 10,4

- Others
- LEH full range
- SB warehouse
- Discounter (without Aldi und Lidl)
- Aldi und Lidl

Source: GfK