

THE STRUCTURES OF THE EUROPEAN POULTRY INDUSTRY : THEIR TRENDS

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Among the agricultural productions, the poultry industry has been characterized by the most important changes during the last 10 or 12 years.

In some countries it is possible to follow very well the increase in the size of poultry production units owing to regular census.

As regards egg production, there are still a lot of small units with less than hundred layers (farm productions). There are only one or two thousands of units with more than 5 000 layers in each country, but they represent from 40 to 60 p. 100 of the total of layers.

For the broiler sector, the production is more concentrated. The units with more than 10 000 broilers represent from 68 to 95 p. 100 of total livestock, but there are only some hundreds of these units.

Generally speaking, production is more concentrated in the United Kingdom than in other countries. It can be explained by the development of big integrated firms in U. K. In West Germany, concentration is also going very fast, but in the Netherlands and Denmark, the mean size is more modest because of the importance of cooperatives in these two last countries.

It is difficult to know what will be the optimum size in the future, it can only be said that concentration will continue.

The size of poultry units finally depends on a lot of factors which can be technical, economical and political factors.

In different countries, an attempt has been made to limit the size of the units in order to balance production with demand and to limit the effect of crisis of the prices paid to producers.

EXPANSION OF LARGE POULTRY ENTERPRISES IN THE E. C. M.

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One can estimate that the event « large enterprise » has become a major fact in European poultry business since 1970. Though being mostly national, the large poultry enterprise has from now on a decisive influence upon the development of production structures and markets.

The large poultry enterprise is defined both by its field of activity and its size — we mark limits of dimension by a minimum turn over of 50 million francs — the field of activity taken into account to measure the size is the sole poultry activity : selection and multiplication of parent-stocks, multiplication of chicks, production of table eggs and poultry, processing and packing of eggs and poultry meat.

In 1972, 66 large poultry enterprises have been numbered among the members of the E. C. M.: 11 in West Germany, 21 in France, 11 in Italy, 8 in Belgium, 3 in Denmark, 8 in Ireland and 25 in the United Kingdom.

The share of market under control of the large poultry enterprises, for all the nine countries, is 90 p. 100 for parent-stocks, 39 p. 100 for the processing of poultry meat, and 20 p. 100 the sales of eggs.

The activities of those enterprises are for 38 firms mostly in the poultry field, for 10 of them mostly in the animal feeding business, while 12 others are mostly « food » and 6 « non-food ».

We can finally mention that among the 66 large poultry enterprises, 17 are British ownerships, 14 are French and 11 are American.

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