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THE ROMANIAN POULTRY MEAT AND EGG MARKET IN THE POST-ACCESSION PERIOD

ABSTRACT

The paper presents an analysis of the poultry meat and egg market in Romania in the period 2002–2024 to reveal the degree of this sector competitiveness. Several economic indicators were taken into consideration for the purpose of this study: inventories, production quantity and value, consumption, as well as trade – exports, imports, balance in value and quantity terms, geographical orientation of the trade flows. The results of the study reveal that in the post-accession period, Romanian poultry meat and eggs became two of the few staples that reached self-sufficiency and were able to enter the international export markets with positive results. Trade was oriented mainly to EU partners, and egg balance trade became positive in 2023–2024. Still, there are some important challenges to the future development of the industry, such as the Avian Influenza free-range, animal welfare regulations (*e.g.* transition to free-range farms) and other environmental concerns that are likely to increase the costs, while the production is expected to further increase due to growing demand.

Key words: poultry meat, eggs, production, consumption, trade.

JEL Classification: Q13, Q17.

I. INTRODUCTION

Poultry meat and egg production have always been an important part of agricultural activity in Romania.

There are many factors that can stimulate or inhibit the development of poultry farms in Romania. Among the stimulating factors are: recent increases in the number of heads in large and very large comercially-oriented farms, at the expense of small-size farms, support from CAP funds for investments in developing poultry farms, increasing demand for poultry meat and eggs. Among inhibitor factors worth mentioning are: increased frequency of droughts, threatening the feed availability for animals, poor development of processing units able to use the local production, and environmental concerns.

Rearing poultry in industrial-type farms is aiming at providing the necessary quantities of poultry meat and eggs for the urban population. On the other hand, small- and medium-sized farms mostly contribute to the supply for rural population.

Domestic consumption of poultry meat increased by 44% in the post-accession period (2007–2024), while the self-sufficiency rate in 2022–2023 reached 96% (NIS, 2025).

The degree of competitiveness of the Romanian poultry and egg sector is good, being among the few sectors that do not come into question and show good signs of continuation and development.

Given the fragile current European context, with more than 1300 outbreaks of H5N1 avian influenza in 16 EU Member States (Belgium, Bulgaria, Czechia, Denmark, France, Germany, Hungary, Ireland, Italy, Lithuania, Netherlands, Poland, Portugal, Slovakia, Spain and Sweden), at the time the present paper was written (November 2025), the National Veterinary Sanitary and Food Safety Authority (ANSVSA) states that there are currently no active outbreaks of avian influenza in Romania, but it maintains a high level of surveillance and recommends the enforcement of additional biosecurity measures overall the country, especially in areas exposed to wild bird migration.

2. STATE OF KNOWLEDGE

Livestock farming, and particularly poultry production is lately under pressure from apparently conflicting targets from the opposed sides of the supply chain. A growing world population means a higher demand. The latest changes in the consumption pattern push for "lighter" and cheaper animal protein such as poultry meat (as compared to other types of meat). Such developments call for an increased and more efficient production. On the other hand, there is an increasing concern among consumers regarding animal welfare, due to a rather widespread view that increased production efficiency would mean diminishing costs through higher animal density, less feed and use of more medication, particularly antibiotics.

Detailed rules are governing the poultry meat and egg market, from changing farming methods such as referred to in Annex II of Regulation (EC) No. 589/2008, including the maximum capacity (free range, barn, enriched and regular cages rearing), down to carcass and egg quality grading, marketing standards, labelling, transport conditions, etc. (EU Commission 2008a, 2008b, 2017).

The industry is facing challenges due to the transition from cages to enriched cages, and further to cage-free systems, which incurs supplementary costs while requiring to keep current production capacities. The EU (in total) is rather advanced in the transition process: in 2024, 38.1% of the egg-laying hen inventories were reared in enriched cages, 39.3% in barns, 15.9% in free range farms and 6.7% in organic farms. Romania also started free-range the transition process, but at a slower pace: in 2024, the respective shares of the egg-laying hens were: 48.4% in enriched cages, 45.5% in barns, but only 3.3% in free-range farms and 2.8% in organic farms (EC, 2025b).

A study by FAO (2017) shows that poultry contributed to global GHS emissions by 10.8%, whereas cattle and swine contributed by 62.2 and 10.1%, respectively. The use of breeding (genetic improvement) showed the potential to reduce emissions: the hen egg-layer industry had the greatest gains (−25%), followed by broilers (−23%) (Wall *et al.,* 2023). So, in an ideal world, farmers should become more efficient and competitive, while improving animal welfare, reducing their environmental impact and observing higher food safety standards (Dawkins, 2017; Castro *et al*., 2023).

The European agricultural and food system, supported by the Common Agricultural Policy (CAP), is already a global standard in terms of food safety and security of supply. In the context of current challenges (COVID-19 pandemic, the war in Ukraine, energy crisis, climate change), it is also intended to become a standard for sustainability. A shift to a sustainable food system can bring environmental, health and social benefits, as well as fairer economic gains (MARD, 2022).

3. MATERIAL AND METHOD

The data on production, consumption and trade used in this paper was extracted from Eurostat, TradeMap, Faostat, and Tempo-online databases. Publications from various academic sources – articles, books, analyses and studies, were consulted and referenced, along with articles from specialised press. In terms of public documents, official documents from different national and international bodies were used: Ministry of Agriculture and Rural Development, the Romanian National Veterinary Sanitary and Food Safety Authority (ANSVSA), EU Commission, FAO.

4. RESULTS AND DISCUSSIONS

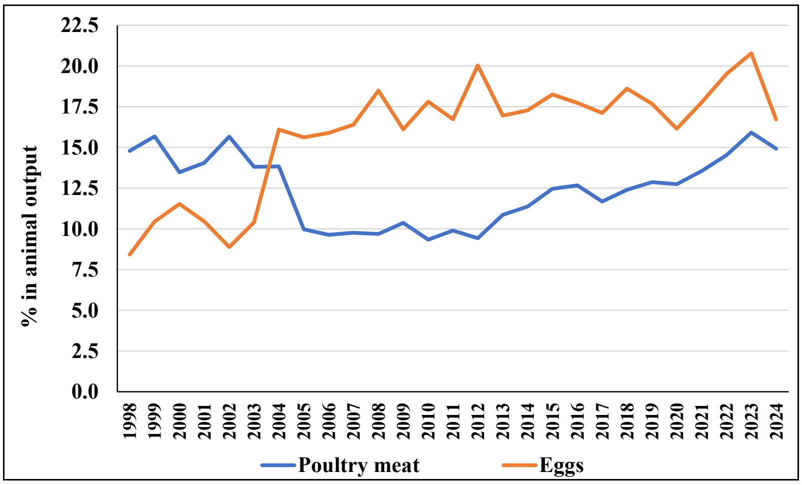
4.1. PRODUCTION

Poultry meat and egg production have always been an important part of agricultural activity in Romania.

In the Romanian animal production value (2000–2024), poultry took a share of 10–16%, and 2.3–6.5% in total agricultural output, while eggs represented 8–21% in animal production, and only 3.6–5.5% in total agricultural output (Figure 1). The value of egg production has surpassed that of poultry meat since 2005, lately coming close to that of pig meat.

The average share in animal production in the pre-accession period (2000–2006) was 12.9% for poultry meat and 12.7% for eggs, and decreased in the post-accession period (2007–2024 average) to 11.9% for poultry meat, but increased to

17.8% for eggs. Similarly, as share in total agricultural output, poultry meat diminished from 4.5% to 3.2%, while eggs share increased from 4.1% to 4.3% in the post-accession period.



Source: Calculations based on data from Tempo-online (NIS).
Figure 1. Share of poultry meat and eggs in animal output.

According to DG-AGRI, despite the losses caused by the Avian influenza since 2015, the European Union is self-sufficient in poultry meat, with a production reaching 14 billion tonnes in 2024, while consumption increased slightly, but continuously, reaching 12.9 billion tonnes in 2023. The EU self-sufficiency rate varied between 109–114% in 2012–2024.

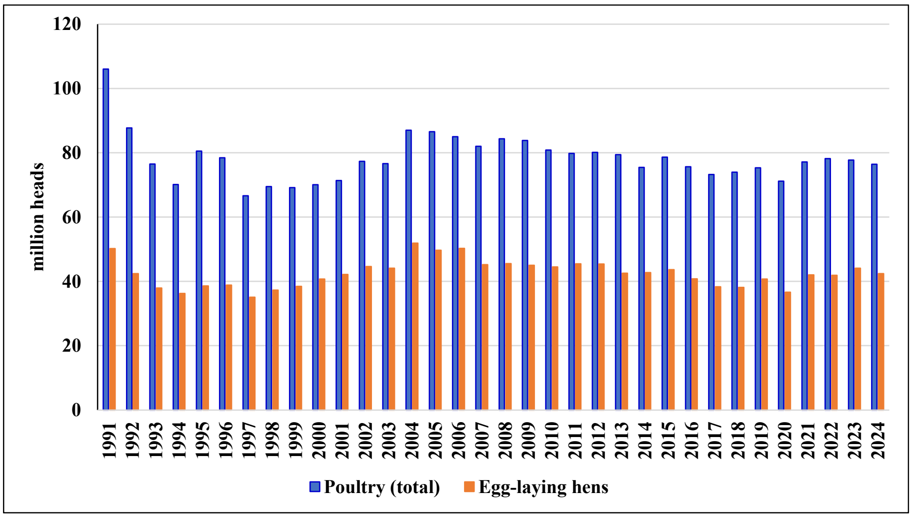
In Romania, the number of poultry heads dropped significantly in 1991–1997, from 103 down to 67 million, when the former huge stat-owned farms went bankrupt and closed. The inventories started slowly recovering, but in small-size households and small new private farms, up to a maximum of 87 million heads in 2004.

In the post-accession period, a new downward trend started, to reach the minimum (71 million heads) in 2020 (during the COVID-19 pandemic), and subsequently stabilised around 77 million heads, with slight variations (Figure 2).

The number of egg-laying hens followed similar trends, to stabilise recently around 44 million heads (Figure 2).

The poultry inventories are reared in small-size farms (less than 100 heads) and in very large farms (over 10,000 heads); the middle-sized farm segment (100–10,000 heads is almost non-existent (less than 1% of the number of farms) (Table 1).

In meat poultry farming, 99.6% of farms have less than 100 heads; they are practically subsistence and semi-subsistence farms, and they account for 1/3 of the total national inventories of poultry for slaughter. On the other hand, the bulk of the inventories for slaughter (66.1%) is concentrated in large farms (over 10,000 heads), but these are quite few: only 117 farms out of 1.13 million farms.



Source: Calculations based on data from Tempo-online (NIS).
Figure 2. Poultry inventories in Romania (2000–2024).

Table 1

Structure of poultry meat and egg producing farms in Romania

Number of heads *per* farm	**Farms with poultry inventory**		**Heads on the farm**		**Average number of heads per holding**
	number	**share in total (%)**	**number**	**share in total (%)**	
MEAT POULTRY					
1–99 heads	1,122,129	99.590	13,141,932	33.10	11.71
100–499 heads	4,397	0.390	257,196	0.65	58.49
500–999 heads	87	0.008	8,890	0.02	102.18
1,000–2,999 heads	5	0.000	5,305	0.01	1,061.00
3,000–4,999 heads	8	0.001	23,824	0.06	2,978.00
5,000–9,999 heads	8	0.001	39,654	0.10	4,956.75
10,000–49,999 heads	54	0.005	1,173,820	3.00	21,737.41
50,000–99,999 heads	19	0.002	1,337,584	3.40	70,399.16
> 100,000 heads	44	0.004	23,674,228	59.70	538,050.64
Total	1,126,751	100.000	39,662,433	100.00	35.20
EGG–LAYING HENS					
1–99 heads	1,638,035	99.700	24,885,868	72.33	15.19
100–499 heads	4,942	0.301	294,633	0.86	59.62
500–999 heads	92	0.006	16,548	0.05	179.87
1,000–2,999 heads	47	0.003	22,043	0.06	469.00
3,000–4,999 heads	8	0.000	26,535	0.08	3,316.88

Number of heads *per* farm	Farms with poultry inventory		Heads on the farm		Average number of heads per holding
	number	share in total (%)	number	share in total (%)	
5,000–9,999 heads	15	0.001	86,645	0.25	5,776.33
10,000–49,999 heads	52	0.003	1,222,428	3.55	23,508.23
50,000–99,999 heads	6	0.000	431,186	1.25	71,864.33
> 100,000 heads	26	0.002	7,420,007	21.57	285,384.88
Total	1,643,223	100.000	34,406,893	100.00	20.94
OTHER POULTRY					
1–99 heads	310,617	98.100	2,581,156	75.10	8.31
100–499 heads	5,707	1.803	147,191	4.28	25.79
500–999 heads	56	0.018	31,180	0.91	556.79
1,000–2,999 heads	73	0.023	55,357	1.61	758.32
3,000–4,999 heads	9	0.003	3,110	0.09	345.56
5,000–9,999 heads	6	0.002	28,387	0.83	4,731.17
10,000–49,999 heads	5	0.002	108,968	3.17	21,793.60
50,000–99,999 heads	0	0.000	0	0.0	0.00
> 100,000 heads	2	0.001	482,186	14.03	241,093.00
Total	316,475	100.000	3,437,535	100.00	10.86

Source: Calculations using data from Farm Structure Survey 2023, NIS.

In egg-laying hens farming, the situation is even worse: 99.7% are small-sized farms (less than 100 heads), but they account for 72% of the inventories. There are only 84 large farms (over 10,000 heads), out of 1.64 million farms, and they account for only 26.4% of the inventories.

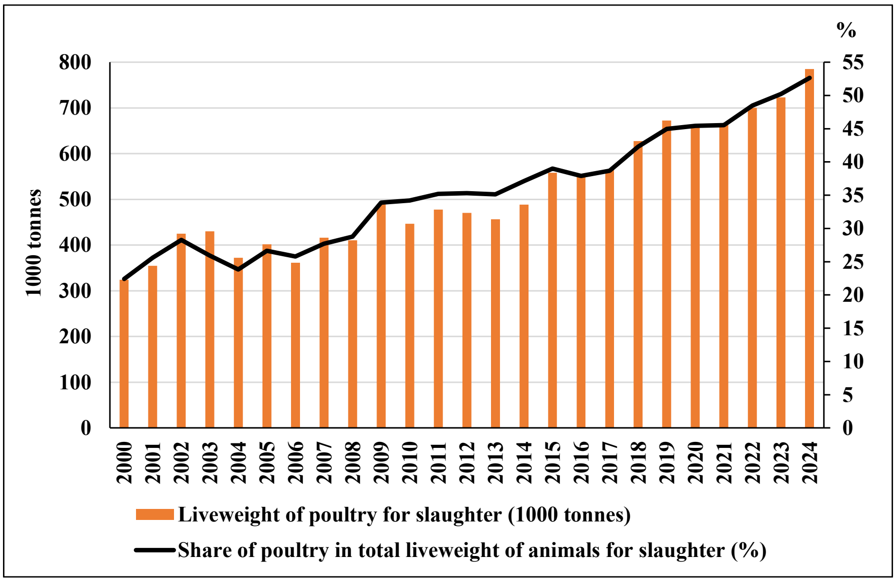
In the EU, out of the total egg-laying hen inventories of 391.4 million heads (2024), six member states accounted for 74%: France and Germany (14.9% each), Poland (13.5%), Spain (12.2%), Italy (10.6%) and Netherlands (7.6%). Romania ranks eight (2.6%).

A similar situation is also found for farms rearing other fowl (turkeys, ducks, geese, quails, pheasants etc.), but they are far less in numbers than the previous two categories.

To deal with such an unbalanced farm structure, specific policies and programmes (with CAP and national funding) are directed to supporting the poultry meat sector (MARD, 2025):

– Genetic enhancement of the poultry populations to improve the quality of poultry carcasses.
– Stimulating the organisation of competitive and efficient farms.
– Increasing the farmers' income who choose to develop poultry farming.
– Increasing the average slaughter weight.

The upward trend of the Romanian poultry production started in 2000 and was maintained with only slight variations; in the post-accession period (2007–2024) it almost doubled (Figure 3). Due to major problems and losses caused by the African Swine Fever to the Romanian pig meat production, since 2022, poultry meat production has exceeded pork production.

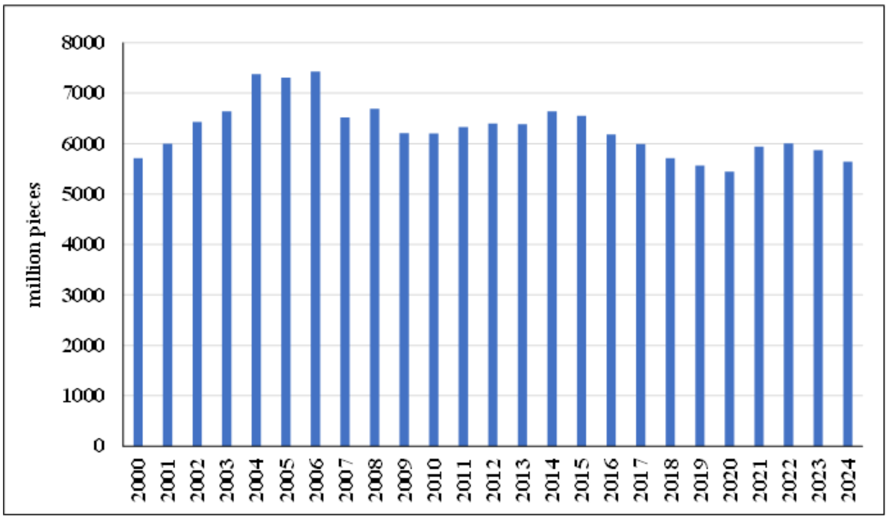


Source: Calculations based on data from Tempo-online (NIS).
Figure 3. Poultry production in Romania (2000–2024).

The total EU poultry production (product weight) was 14,05 million tonnes in 2024; six member states accounted for 73% of it: Poland (2.89 million tonnes = 21%), Spain (1.8 million tonnes = 13%), France (1.72 million tonnes = 12%), Germany (1.57 million tonnes = 11%), Italy (1.39 million tonnes = 10%) and Netherlands (0.84 million tonnes = 6%) (EC, 2025a).

The total egg production in the EU was 6.66 million tonnes in 2024; six member states accounted for 75% of it: France (1.01 million tonnes = 15%), Germany (0.97 million tonnes = 15%), Spain (0.96 million tonnes = 14%), Italy (0.8 million tonnes = 12%), Poland (0.67 million tonnes = 10%) and Netherlands (0.57 million tonnes = 9%).

In Romania, after a steady increase (30%) in the pre-accession period (2000–2006), from 5711 million pieces in 2000 to 7429 million pieces in 2006, the egg production started a downward trend, to decrease under 6,000 million pieces per year since 2017 and stabilised subsequently around 5750 million pieces per year (2019–2024 average) (Figure 4).



Source: Calculations based on data from Tempo-online (NIS)
Figure 4. Eggs production in Romania (2000–2024)

4.2. CONSUMPTION

In the EU, poultry meat consumption increased continuously, from 10.22 million tonnes in 2012 up to 12.4 million tonnes in 2024, with a self-sufficiency rate varying between 109–114% (EC, 2025a).

In the Romanian consumption pattern, pork ranks first (733,000 tonnes in 2023), followed by poultry meat (554,000 tonnes), beef (94,000 tonnes) and sheep and goat meat (51,000 tonnes) (NIS, 2001–2023).

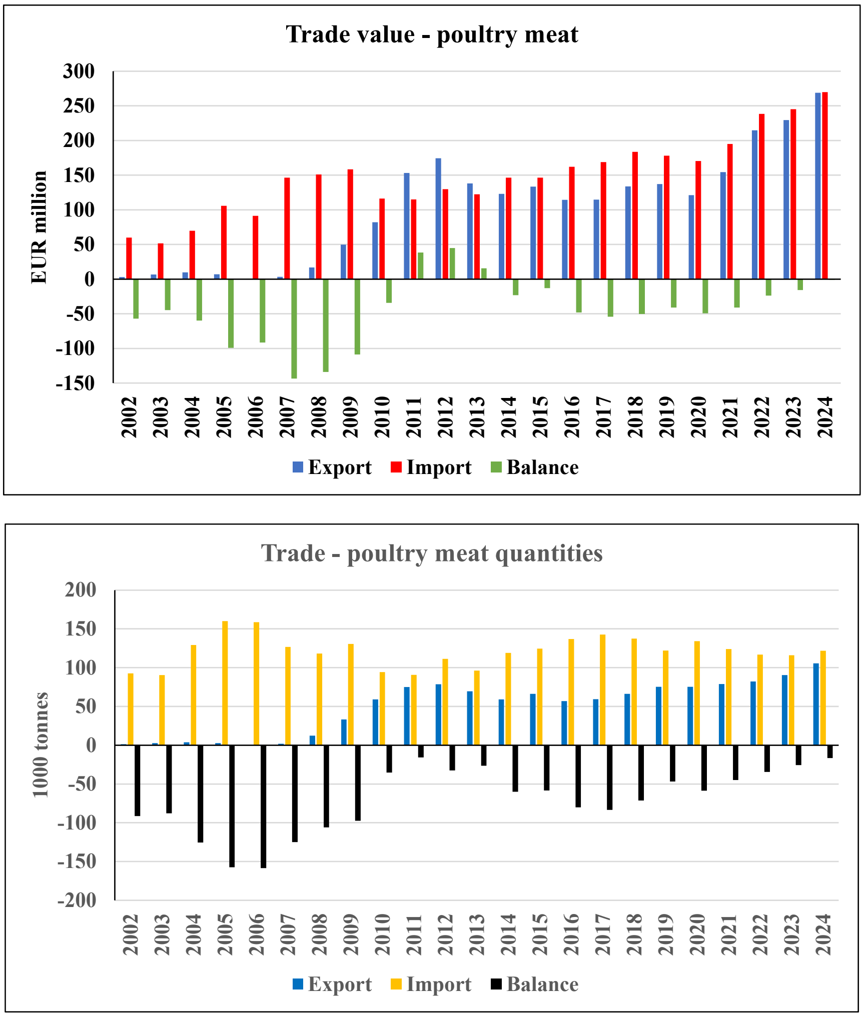
Poultry meat consumption was 21.4 kg/year/capita before accession (2006), then fluctuated in 2007–2016 between 16.5–21.5 kg/year/capita. Since 2017, consumption has increased constantly, to reach 29 kg/year/capita in 2023, higher than the average EU consumption (25 kg/year/capita) (NIS, 2001–2023).

In the pre-accession period, egg consumption in Romania increased from 10.4 to 14.2 kg/year/capita, with a self-sufficiency rate close to 100%. After accession, egg consumption varied between 11.6 to 13.4 kg/year/capita, slightly over the EU average consumption of 11.5 kg/year/capita. The self-sufficiency rate for eggs in Romania increased from 96.0 (in 2008) up to 102.1 (in 2023), slightly below the EU average (104%).

4.3. TRADE

The main world exporters of poultry meat are Brazil, USA, EU, Thailand, China and Turkey, while the main importers are China, Japan, Mexico, United Kingdom, United Arab Emirates, with EU ranking fifth.

Romanian exports of poultry meat were negligeable in the pre-accession period (less than 4,000 tonnes, with values below 10,000 EUR). In the early post-accession period (2007–2012), exports increased significantly, up to 79,000 tonnes, worth EUR 175 million. A decline followed until 2016; ever since exports have increased continuously, to reach 105,000 tonnes, worth EUR 269 million in 2024 (Figure 5).



Source: Calculations based on data from Eurostat.
Figure 5. Romanian poultry meat trade (value and quantity).

According to the Union of Poultry Breeders of Romania (Economedia, 2024), Romania exports mainly high-quality pieces of meat (chicken breast and legs) and imports lower quality pieces (such as liver).

On the international market, the main importers of poultry meat in 2024 were China, Japan, Mexico, United Kingdom, United Arab Emirates, with EU ranking sixth.

Romanian imports were very high in the pre-accession period, reaching a peak in 2005 (160,000 tonnes, worth EUR 106 million). In the early post-accession period (2007–2009), imports were even higher, then dropped in 2010 and increased ever since, reaching maximum values in 2024 (122,000 tonnes, worth EUR 270 million) (Figure 5).

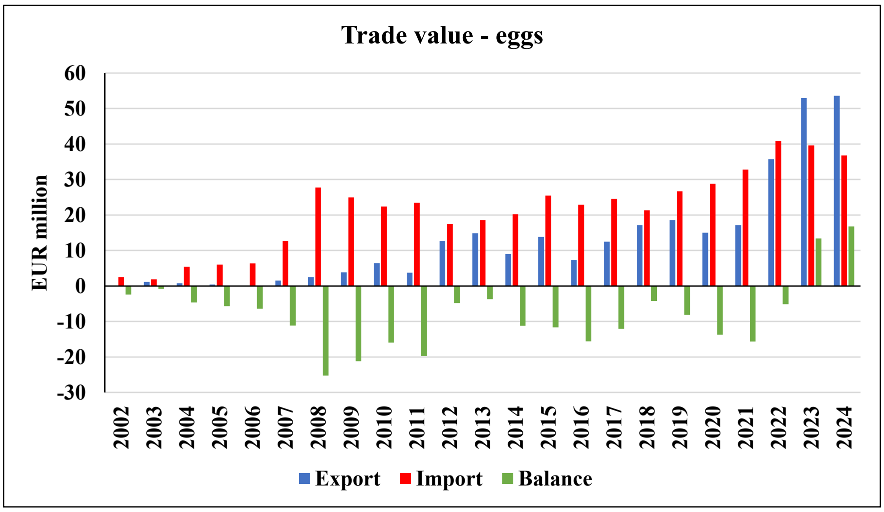
The trade deficit fluctuated until 2010, turned positive in 2011–2013, then became negative again, but with values not exceeding EUR 55 million, decreasing since 2020. In 2024, the deficit was EUR 0.81 million, and estimations for 2025 point to shifting to a positive balance.

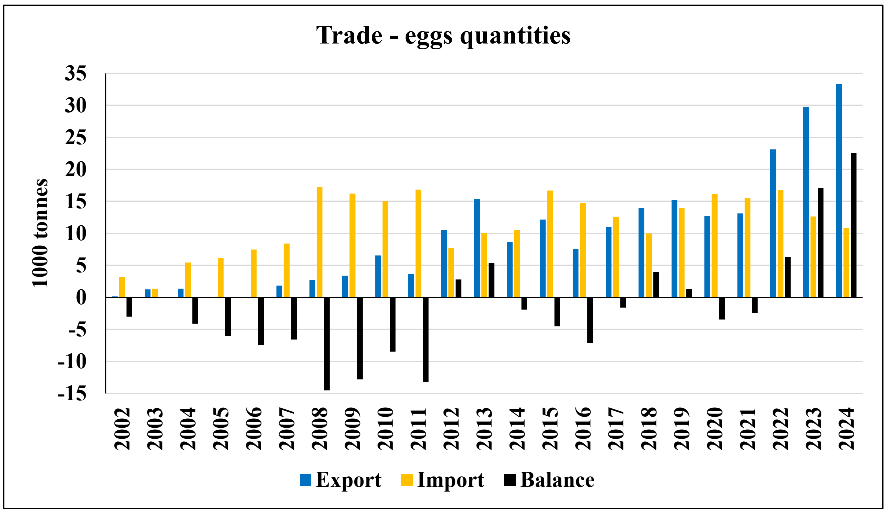
Both in pre- and post-accession periods, Romanian poultry meat exports were mainly directed to the EU (over 80%). The top five EU destinations in 2024 were: Bulgaria, Hungary, United Kingdom, France and Netherlands; they accounted together for 80% of the intra-community exported quantities. The top five non-EU destinations in 2024 were: Congo, Vietnam, Ghana, Serbia and North Macedonia; they accounted together for 65% of the extra-EU exported quantities.

Poultry meat imports in the pre-accession period came mainly from non-EU countries (up to 87%), but after accession the source has been mainly the EU (over 82%), due to the principle of community preference. The top EU five sources for Romanian egg imports were (in 2024): Hungary, Netherlands, Poland, Germany and Bulgaria; they accounted together 85% of the intra-community imported quantities. Egg imports from extra-EU countries came from Ukraine (78%) and Brazil (respectively 22% of the non-EU imported quantities).

On the world market, EU is the main eggs exporter, followed by China, Iran, Ukraine, India and USA, while the main importers are China, EU, United Kingdom, United Arab Emirates, and USA.

Romanian egg exports were negligeable in the pre-accession period (less than 1,400 tonnes, with values below EUR 1.15 million). In the early post-accession period (2007–2013), exports increased sharply (by a multiplication factor of 8.3), up to 15.370 tonnes (Figure 6).





Source: Calculations based on data from Eurostat
Figure 6. Romanian eggs trade (value and quantity)

In value terms, the increase was even sharper (multiplication factor 9.7), up to EUR 14.9 million. The subsequent years (2014-2019) showed fluctuating export quantities (7311 – 18,560 tonnes) and values (EUR 7.6 – 13.9 million). Since 2020, exports have seen a renewed sharp increase, up to a peak in 2024 (33,340 tonnes, worth EUR 53.6 million) (Figure 6).

The resulting egg trade balance was a fluctuating one, from deficits exceeding EUR -15 million (in 2008–2011, 2016 and 2021), to surpluses higher than EUR 13 million, in 2023–2024.

The fluctuating values of the trade balance were influenced by combined factors such as diminished domestic production due to diminished inventories as a consequence of Avian Flu outbursts (although in various counties, at various intensities, but affecting mainly the industrial poultry meat farms). On the contrary, more intense outbursts of the Avian Flu in USA, China and several EU Member States provided temporary opportunities for Romanian egg-laying hen farms (less or not affected by the disease) to increase their exported quantities, at higher prices thanks to increased international demand.

Both in pre- and post-accession periods, Romanian egg exports were mainly directed to the EU. The top five EU destinations in 2024 were: Italy, Germany, Bulgaria, Netherlands and Austria; they accounted together for 85% of the intra-community exported quantities. Egg exports to non-EU destinations in 2024 were directed to Ukraine and Moldova.

Egg imports in the pre-accession period came up to 67% from the EU, but after accession the source has been mainly the EU (over 91%), due to the principle of community preference. The top EU five sources for Romanian egg imports were (in 2024): Poland, Bulgaria, Hungary, Netherlands and Belgium; they accounted together for 92% of the intra-community imported quantities. Egg imports from extra-EU countries came in 2024 exclusively from Moldova Republic in 2024.

5. CONCLUSIONS

The poultry and egg industry must continuously adapt to many challenges: providing high-quality food at affordable prices for an increasing population, maintaining environmental friendliness and animal welfare, while adopting technological advances (genetics, feeding, disease prevention and control) to be able to remain efficient and competitive on local and global markets.

The long-term decline in poultry numbers (similarly to cattle, dairy cows and pigs) is an essential aspect influencing the unbalanced farm structure. This trend might be yet an advantage to increase average farm size and production efficiency (Popescu & Cărătuș-Stanciu, 2021).

Poultry meat and eggs are among the few staples for which the self-sufficiency rate is close or slightly over 100%.

According to the Ministry of Agriculture and Rural Development (MARD, 2025), current and future policies are aiming at medium and long-term rehabilitation and recovery objectives of the poultry meat sector by providing financial support for production under conditions of economic efficiency, for the development of more processing and preservation units for poultry meat and derived products, thus enabling the creation of a competitive sector in line with European Union standards.

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