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## The food balance dynamics of the poultry meat

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## THE FOOD BALANCE DYNAMICS OF THE POULTRY MEAT

CHETROIU RODICA<sup>1</sup>

**Abstract:** *The paper performs an analysis of the food balance evolution for poultry meat, taking into account the internal production, imports, exports, consumption levels for this food product. Thus, the food balance had a favourable evolution in the recent years, the market supply of poultry having as a source both domestic production and quantities from imports. The amount of poultry meat from domestic production performed generally positive from year to year, so that in 2015 was by 16.5% more meat than in 2010. Also, the imports registered a significant increase of 34.3% during 2010-2015, completing the market demand, but, at the same time, being a factor of competition for the producers in our country. The highest growth was noted in exports, which were 58.9% higher in 2015 compared to 2010, demonstrating that domestic production of poultry meat has become more competitive in the international market, which managed to enter through increase technological performance and product quality. The result of these evolutions is the increased supply of poultry on the Romanian market, leading, in 2015, to find on the market an amount of 14.5% higher compared to 2010. At the same time, the meat poultry consumption increased, reaching in 2015, at 22.7 kg / capita, 24.7% higher compared to 2010.*

**Keywords:** *meat, poultry, balance, production, import*

**JEL Classification:** Q11; Q18

### INTRODUCTION

The Romanian aviculture has a specific characteristic which has not been used in other countries: it is fully integrated. It produces its own fodder in factories of high performance, and some companies produce through their agricultural activities even the necessary foodstuff ingredients. At the same time, it holds the entire production chain, from breeding farms and incubation units for the production of chicks, to high performance growing of broilers, but also has a major involvement in the activity of industrialization, in slaughterhouses and top facilities for meat processing, as well as in distribution and marketing networks through own stores. Moreover, it exports the surplus at better prices compared to domestic consumption.

The internal Romanian population does not have the capacity to consume, together with the domestic production, the large quantities from import, domestic producers being unable to sell the production and therefore having unsaleable stocks. The poultry meat sector was one of the domains that were able to recover faster than other segments of the meat industry.

### MATERIAL AND METHOD

The present study provides a comparative analysis of the evolution of food balance at poultry meat, taking into account domestic production, imports, exports, consumption levels for this food product, using both data from statistical sources (NIS, FAOSTAT) and data from MARD and the Union of Poultry Breeders in Romania.

### RESULTS AND DISCUSSIONS

The evolution of poultry stocks during 2010-2015, presented in the Table 1 and Chart 1 describes a sinuous curve, so that at the end of the interval, there were 76.862 thousand heads, 4.93% less than in 2010. These stocks are 99.9% in the private sector and inside this sector, 69.7% are registered in individual agricultural holdings.

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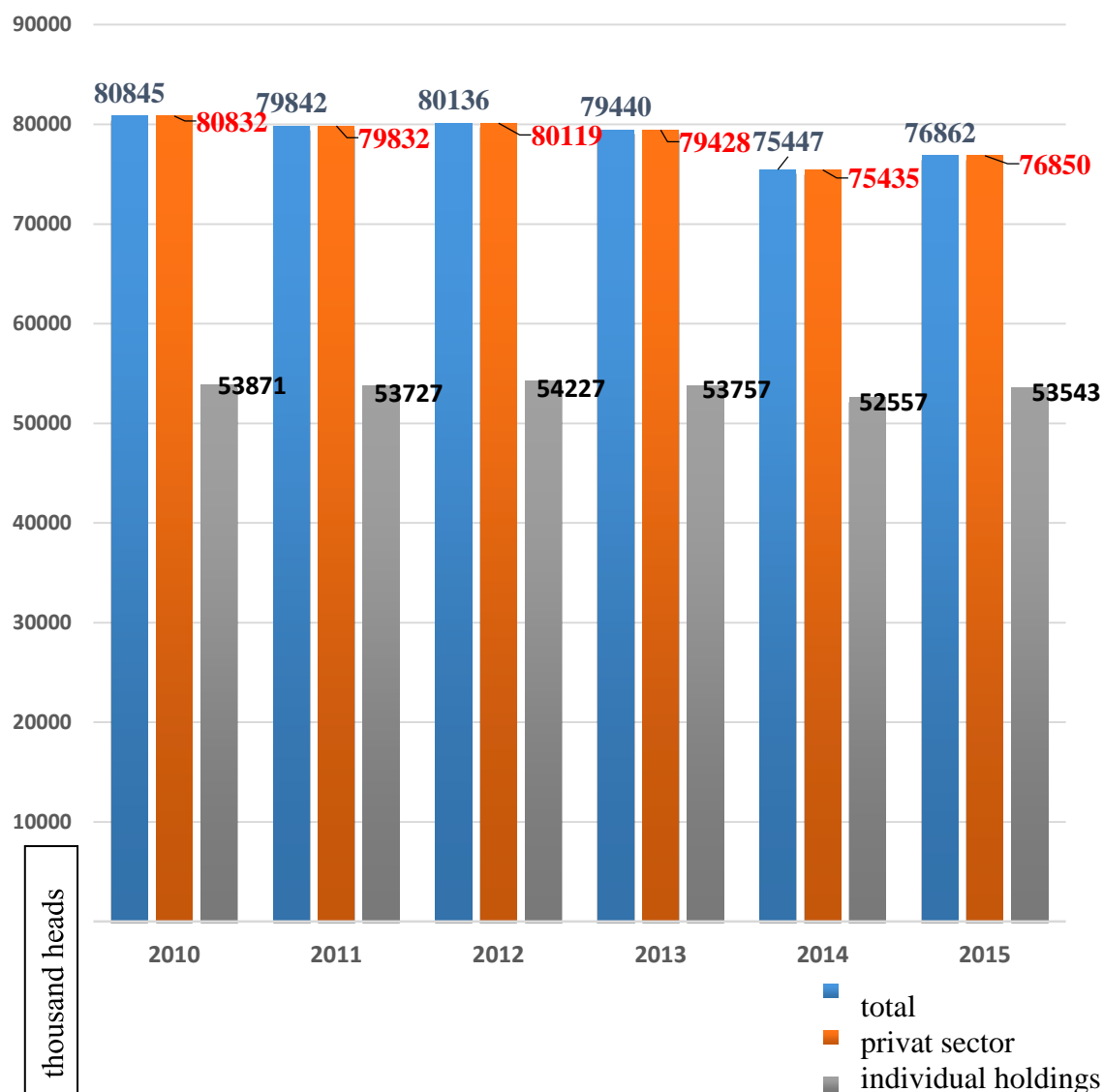
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Table 1 – Evolution of poultry stocks during 2010 – 2015 (thousand heads)

Forms of ownership	2010	2011	2012	2013	2014	2015
Total, of which:	80845	79842	80136	79440	75447	76862*
Privat sector	80832	79832	80119	79428	75435	76850**
Of which: Individual agricultural holdings	53871	53727	54227	53757	52557	53543**

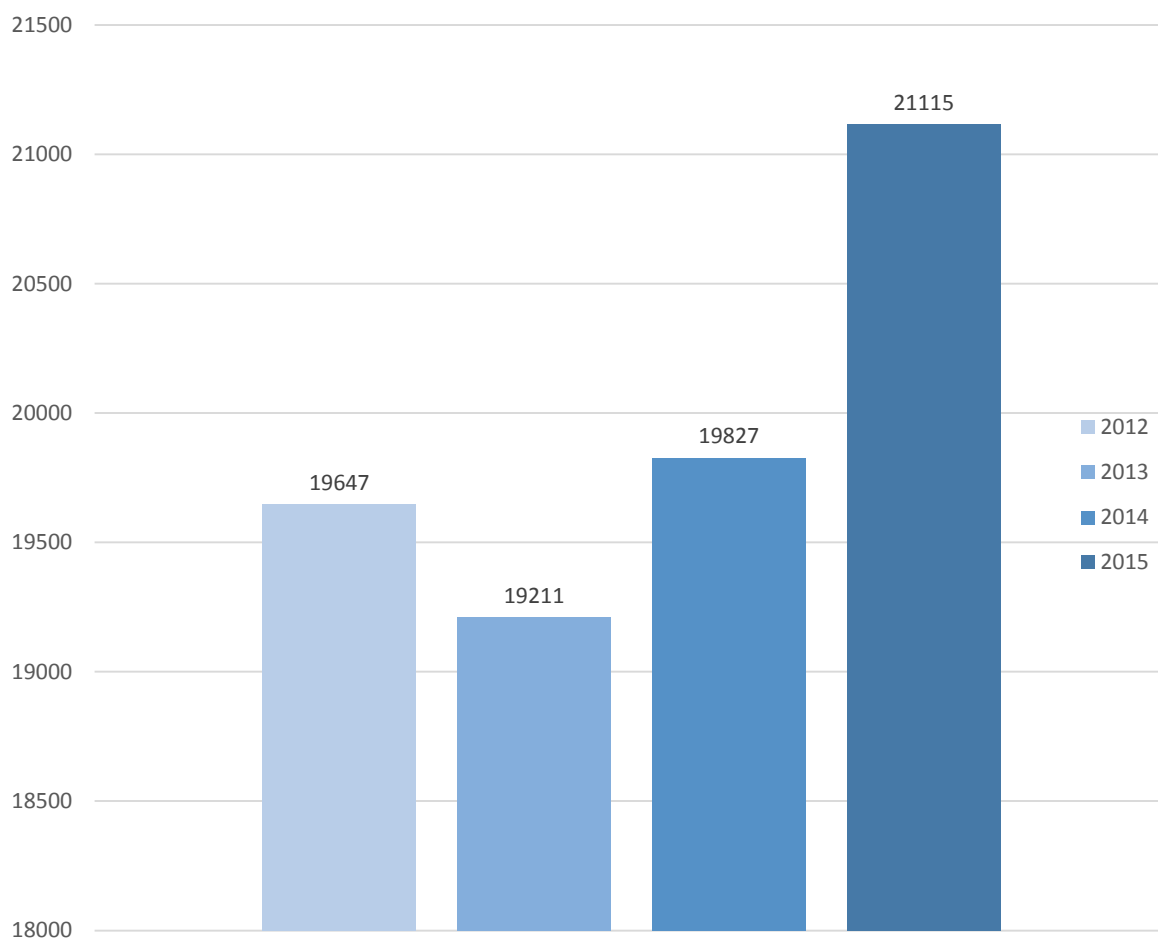
Source: NIS; \*MARD; \*\* own estimation

Graph 1 – Total poultry stocks during 2010 – 2015 (thousand heads)



Raising broilers has experienced a favorable dynamics in the recent years, so that after the decrease in number in 2013, has followed a revival of them, reaching in 2015 to increase by 7.5% compared to 2012 (Graph 2).

Graph 2 - The number of meat poultry during 2012-2015, the end of year (thousand heads)



Source: Union of Poultry Breeders in Romania

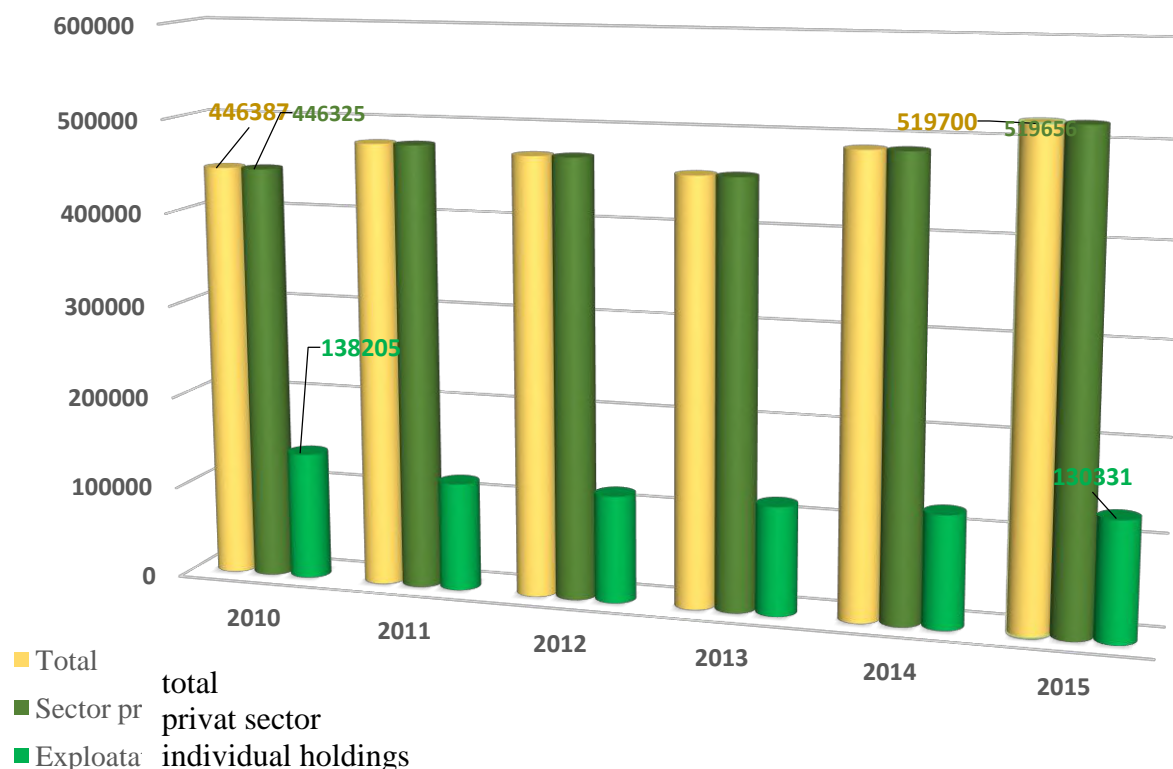
Regarding the production of poultry meat, presented in Table 2, it is noted that this comes almost entirely from the private sector and has increased with 16.4% in 2015 compared to 2010. Also, inside this sector, only 25% of poultry meat comes from individual agricultural holdings, the rest coming from the industrial production.

Table 2 – Production of poultry meat by forms of ownership, tons live weight

Forms of ownership	2010	2011	2012	2013	2014	2015
Total	446387	477529	470528	456632	488361	519700*
Privat sector	446325	477455	470485	456585	488320	519656**
Of which: Individual holdings	138205	117490	116697	118134	122472	130331**

Source: NIS; \*MARD; \*\* own estimation

Graph 3 – Production of poultry meat on forms of ownership, tons live weight



The offer of the poultry meat on market has as a source both the domestic production of poultry meat and the quantities supplied by imports. The amount of poultry meat from domestic production, expressed in carcass meat, has evolved generally positive from year to year, so that in 2015 was by 16.5% more meat than in 2010. Also, the imports recorded a significant growth of 34.3% during the same period, complementing the market demand, but at the same time being a factor of competition for the producers in our country.

The highest growth was noted in exports, which were 58.9% higher in 2015 compared to 2010, demonstrating that domestic production of poultry meat has become more competitive in the international market, which managed to break through increase technological performance and product quality.

The result of these developments is the increased supply of poultry meat on the Romanian market, leading, in 2015, to be on the market an amount 14.5% higher compared to 2010 (Table 3 and Graph 4).

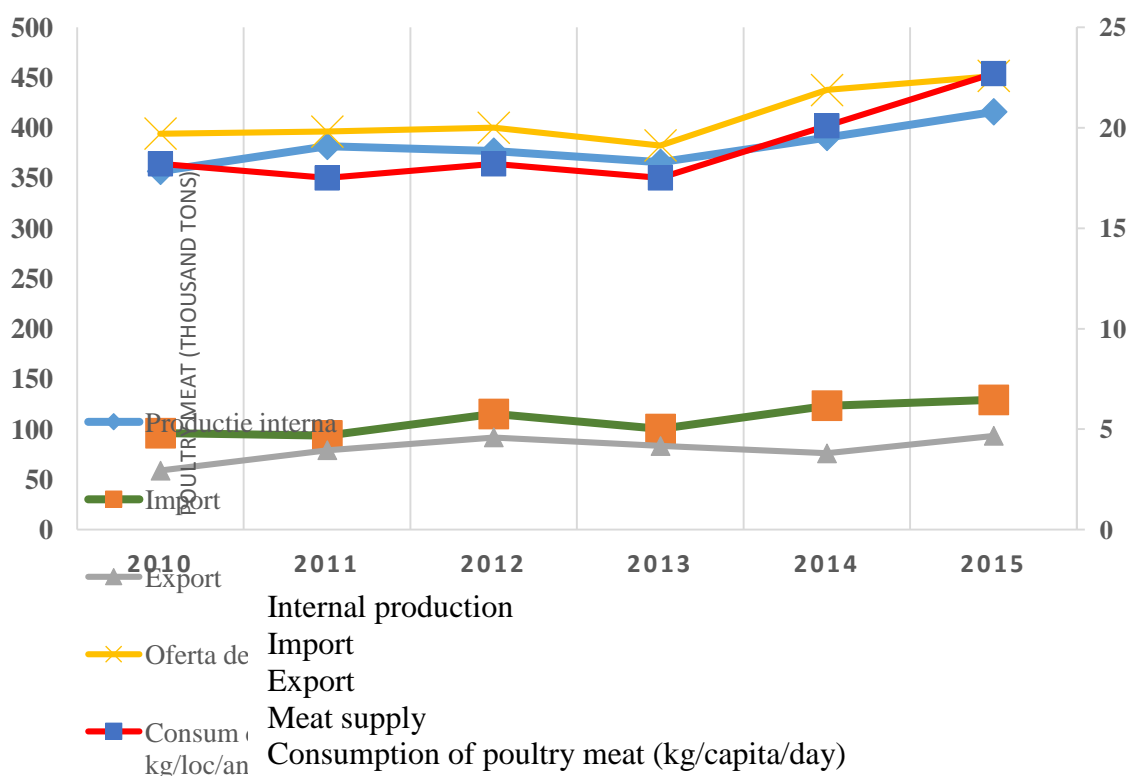
At the same time, the consumption of poultry meat has increased, reaching in 2015, 22.7 kg / capita, 24.7% higher compared to 2010.

Table 3 – Demand and supply of poultry meat (thousand tons)

Specification	2010	2011	2012	2013	2014	2015
Domestic production (meat in carcass)	356,8	381,6	376,8	365,6	390,4	415,8*
Import	96,1	93,7	115,1	100,1	123,3	129,1
Export	58,7	79,0	91,8	83,3	76,0	93,3
Poultry meat supply	394,2	396,3	400,1	382,4	437,7	451,6*
Consumption of poultry meat - kg/capita/year	18,2	17,5	18,2	17,5	20,1	22,7
Domestic production share of supply %	90,5	96,3	94,2	95,6	89,2	92,1

Source: NIS; \*MARD data

Graph 4 – Balance of poultry meat



## CONCLUSIONS

In conclusion, the balance dynamic of the poultry meat in our country has generally a positive trend towards increasing of the quantitative and qualitative offer on market, which has led to an increase in the consumption of this product in the period analyzed. Also, in the supply structure, the domestic production is the main source, which is a guarantee that the internal producers sell predominantly their production on the internal market.

The chain of poultry meat production in Romania is similar to those found in other European countries, but shorter, proving the integration of processors within this flow, which strengthens the position of producers in the production chain by shortening the path from production to consumer plate.

Regarding the imports of poultry meat, the producers have to face considerable pressure from the surplus of producers in the EU, the US and the region. Since it is possible that these pressures to continue, they must be counteracted by the efforts to unite and increase the efficiency of producers and processors of poultry. This may require removing barriers to foreign investment and technology transfer, in order to improve productivity and efficiency in these subsectors.

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