

An Alternative View on EU-West Africa Poultry Sector
A Review of the European Commission's West Africa-EU Poultry Sector Briefing
by Dr Paul Goodison, 2 March 2021

Introduction

As background to planned discussions on the EU's poultry sector trade relationship with West African countries, the European Commission circulated an information note setting out the EC perspective on this trade. It sought to:

- *Assert how EU poultry production growth was demand driven, but largely neglected the **impact which the EU's tightly regulated poultry meat import regime on investment and production decisions in the EU poultry sector.***
- *Set out the phenomenal increase in effective consumer demand for low-cost protein which was underway prior to the Covid-19 pandemic, a development which is incontestable.*
- *Explore the structure of poultry meat production and demand in West Africa and the constraints on competitive production faced, which undoubtedly exist.*
- *Sought to explore the issue of the right balance required between domestic production and imports, given evolving West African demand.*
- *Argue the EU provides no subsidies to EU poultry production and trade.*
- *Outline the scale of EU development assistance to agricultural development in West Africa.*
- *Briefly explore the impact of the Covid-19 pandemic and the EU's health focussed 'farm to fork' strategy.*

The following paper seeks to critically reflect on the arguments set out by the European Commission in this paper, with a particular focus on the impact of the EU's trade policy in regard to EU imports of poultry meat and the sharp contrast this provides with the EU's evolving approach to the use of trade policy tools by African governments in the poultry sector.

Consumer Demand Growth Drives EU Poultry Meat Production, but....

The EC asserts 'EU poultry meat production is driven by consumer demand. This demand has been rising consistently for many years.' The implication is that the expansion of EU poultry production and expansion of exports, is a by-product of the growth in EU consumer demand for poultry meat, linked to the shift in European meat consumption from 'red meat' to 'white meat'.

Against this background, the EC asserts EU poultry exports receive no form of public subsidy, highlighting how 'the EU has not spent a single euro on export refunds for the agricultural sector since July 2013.' It is further asserted 'EU poultry production is driven by market developments and poultry farmers are subject to strong variability in prices and income between marketing years, similar to farmers in other sectors, and in other market-oriented countries.'

While indeed a major expansion of EU poultry meat consumption is underway, EU poultry producers receive no direct financial assistance from the EU budget and there is a variability in EU prices and income (witness the recent impact of the Covid-19 pandemic on the EU poultry market), this is not the whole picture when it comes to the factors driving the rapid growth in EU poultry meat exports to sub-Saharan Africa.

Observation

The EC's review of its policy towards domestic EU poultry sector development misses an important aspect of the EU poultry sector production environment, namely the impact of the EU's **strictly controlled poultry meat import regime**. This has a major impact on the context for investment in EU poultry sector development and consequently the extent to which **growth in EU poultry meat consumption translates into growth in EU production**.

This EU poultry meat import regime consists of:

- A disaggregated system of high MFN tariffs (no less than 22 tariff subheadings ranging from fixed import tariffs of €187/tonne to €1,024/tonnes and from *ad valorem* rates of 10.9% to 15%).
- The application of a wide range of tariff rate quotas (TRQ), established in line with the EU's GATT agreed minimum market access obligations and bilateral trade agreement market access concessions¹.
- The maintenance of a *special safeguard mechanism* to control access to the EU market if needed (which has been permanently invoked since the conclusion of the Uruguay Round of WTO negotiations).
- The operation of a system of imports licences for the application of agreed TRQs, to enable close monitoring of the operation of the poultry meat import regime.

This trade regime allows the EU to manage access to the EU market in light of demand trends and production availability, in ways which ensure ***the benefits of the expansion of European poultry meat consumption accrues almost exclusively to EU poultry meat producers.***

According to EU poultry meat producers these high tariffs and import quotas play a '***vital role in restricting the volume of imports unto the EU from 3rd countries.***' A 2005 evaluation of the EU poultry trade regime argued the application of this regime, maintained ***prices between 11.5% and 13.1%*** and ***production between 7% and 13.3% higher than would be the case in the absence of this protective traded regime.***

This ***higher growth rate in EU poultry meat production*** which the EU's strictly controlled poultry meat import regime encourages, ***automatically translates into a higher rate of expansion of EU production poultry parts***, for which there is only a limited market in Europe, and which consequently are ***increasingly exported to sub-Saharan African markets at extremely low prices.***

At the time of this evaluation, the EU poultry industry argued '***in the absence of import tariffs...the EU market would rapidly be influenced by imported products, with EU producers increasingly restricted to supplying niche markets.***'² This situation has not changed radically since 2005, with the price competitiveness of EU poultry production still falling far short of that of other major global suppliers.

A 2017 Wageningen University study for AVEC on competitiveness of the EU poultry sector estimated ***Brazilian*** production costs were ***70% of those of the 9 EU member states surveyed***, while those of ***Ukraine, the USA, Argentina, and Thailand*** respectively were ***74%, 81%, 83%, and 83%*** of the costs of the 9 EU member states poultry sectors surveyed. There had been no major change in these cost ratios over successive Wageningen University surveys.

To place this in a wider context, the additional costs in the EU attributed to ***higher EU environmental standards*** is estimated to account for only ***5.8%*** of total average EU poultry production costs.

Thus, even in the absence of higher EU environmental and animal welfare standards which raise EU production costs, ***imported poultry meat would still be between 11% and 24% cheaper than domestically produced EU poultry meat.***

It is against this background, that the ***EU's protective poultry meat import regime is central to the growth of EU poultry meat production in response to the expansion of domestic EU consumer demand.***

This is of considerable important to the EU's poultry meat export trade to sub-Saharan Africa which in large part ***consists of poultry parts*** for which there is limited demand in the EU. The ***expansion of EU exports of poultry parts is intimately connected to the expansion of EU poultry meat production*** which takes place behind a ***highly protective EU poultry meat import regime.*** The responsiveness of EU poultry producers to rising EU consumer demand cannot be divorced from this wider EU trade policy, which is central to investment and production decisions in the EU.

¹ For example, under the still to be ratified EU-Mercosur FTA TRQ of 180,000 tonnes is to be phased in over 6 years, but with this accommodating only 58% of the peak volume of Brazilian poultry meat exports to the EU in recent years.

² Agra CEAS Consulting, 'Evaluation of the Common Market Organisation (CMOs) for pigmeat, poultrymeat and eggs', Contract 30-CE-0009330/00-422134/CC/November 2005, http://ec.europa.eu/agriculture/eval/reports/pig_poultry_egg/fullrep_en.pdf

This expansion of EU poultry meat production would be *far lower in the absence of the EU's existing protective poultry meat import regime*. Indeed, *the removal of this import protection from EU producers would rapidly see a contraction in EU poultry meat production*.

Question to the European Commission:

In light of the EU's successful use of a 'managed import regime', based on tariff rate quota restricted access for imports, would not a similar 'managed trade regime' approach be needed in sub-Saharan African countries, as part of a wider comprehensive and integrated approach to encouraging investment in all parts of the poultry meat supply chain?

EU Exports Meet the Needs of Rising West African Consumer Demand, but....

According to the EC, the West African market is seen as attractive to EU exporters, given its booming population (and hence high consumption growth), emerging middle class and strong demand for low-cost protein. In regard to the latter dimension the EC emphasises the important role low-cost poultry meat can play in meeting low-income urban consumer demand. However, it should be borne in mind there is not always a direct correlation between low import prices and the final prices paid by consumers in West Africa.

It is argued the traditional production systems which dominate West African production (70%), *'cannot satisfy requirements for processing, packaging and distribution via cold chains.'* The implication is that current patterns of EU exports of frozen poultry parts can better satisfy consumer requirements for the safe distribution of poultry meat through cold stores.

The EC in its brief on the EU-West Africa poultry sector relations seeks to highlight the EU's *'Farm to Fork'* strategy with its *'stringent quality, environmental and animal welfare standards.'* Of particular relevance in a West African context is the food safety and food quality aspects of the EU's *'Farm to Fork'* policy, which places public health centre-stage. Principles and approaches applied by the EU in ensuring the ***safety of food delivered to final consumers*** would appear to be particularly relevant given the rising middle income urban demand and the existing health challenges faced by both the urban and rural poor across Africa.

Observation

The implication that current patterns of EU exports of frozen poultry parts can better meet the rising expectations of urban consumer for safe low-cost protein, does not stand up well to close scrutiny. The emphasis placed by the EU in its *'Farm to Fork'* strategy on food safety and food quality would appear to be particularly relevant in this context.

There is growing anecdotal evidence that the integrity of the cold chain is repeatedly violated by current patterns of EU poultry meat exports before they reach sub-Saharan African consumers. This is a result of both importer practices, which sees the defrosting of imported poultry parts, their repackaging and re-freezing prior to onward distribution. The process of onward distribution can also involve wide-spread violations of the integrity of cold chain storage requirements, particularly when cross border illicit trading activities are involved (e.g., for exports of EU poultry parts to **Benin** and onward to the **Nigerian** market). This gives rise to a situation where, by the time EU chicken parts reach African consumers they can generate serious health problems.

On health grounds therefore there would appear to be a case for regulating the trade in frozen poultry parts so that frozen poultry meat can only be imported and placed for sale on the market by ***'approved undertakings.'*** Such approved undertakings would need to meet strict requirements for the handling and distribution of frozen poultry meat to the end consumer, in order to minimise the risk to public health. This is an increasingly important consideration given the stains placed on African health systems by the Covid-19 pandemic.

This would mirror the public health focussed 'approved undertakings' approach adopted by the EU for the marketing of dairy products, under which dairy products can only be placed on the EU market by 'approved undertakings' which are obligated to ensure specific handling and food safety requirements are complied with.

Question to the European Commission:

Given the growing anecdotal evidence of the public health problems which can arise from the current handling practices for EU poultry meat imports before they reach the final African consumers, on public health ground would not an '**approved undertaking**' approach, similar to that used by the EU in the dairy sector, not be appropriate for the handling and placing of imported poultry meat for sale on African markets, as part of a 'Farm to Fork' approach to food safety in Africa?

Production Shortfall Can Not Be Addressed in the Short-term, but....

The EC acknowledges that in some West African countries *'poultry meat production has been expanding steadily over the years, with some countries more dynamic than others.'* However, the EC is rather dismissive of local poultry sector production potential, suggesting the commercial poultry sector in West Africa is lacking competitiveness *'due to lower efficiency and high cost compared to other regions on the globe'*. This it is held is in part driven by climatic conditions and the prevalence of animal diseases and in part by a lack of investment in the sector.

The EC cites a 2017 study which finds *'in the case of Ghana, exclusively relying on domestic poultry meat production would require an almost 20-fold increase in capacity and output.'* What is more, *'this would require the feed and grain sectors to be well positioned to respond quickly to meet demand from the poultry meat sector'*. It suggests this cannot be achieved in the short-term. What is more, with demand for poultry meat growing strongly, it is suggested local supply capacities for the foreseeable future in West Africa will fall short of demand. On this basis it is suggested *'imports will continue to fill the gap in required quantity and quality, allowing African consumers to buy poultry meat at affordable prices.'*

The EC argues *'the loss of poultry market share in recent years for domestic producers reflects among others the difficulties that West African countries face in providing the institutional arrangements needed to ensure the tight coordination of inputs such as feed, veterinary products, and day-old chicks required by modern poultry production systems.'*

It is argued import demand in West Africa is met by 3 main players, Brazil, the USA, and the EU. It is maintained *'the 3 main players seem to substitute each other in imports to African markets: whenever imports from one country slow down, these are easily replaced by imports for the other countries.'* It is implied the scope for expanded intra-African trade is limited.

However, the EC also emphasises how in the context of the impact of the Covid-19 pandemic *'sustainability of food supply chains as well as food security and safety are nowadays more than ever in the heart of the debate'* on agri-food system development.

Looking at longer term issues, the EC highlights the deployment of EU development assistance in support of *'food and nutrition security and sustainable agriculture'*, which over the 2014-2020 period have been *'the main sectors of intervention of EU development cooperation'* programmes in West Africa.

The strong implication is that development assistance financing can play a more important role than trade policy in promoting poultry sector development in West Africa. This is something of a reversal of the conventional E approach which places emphasis on the importance of appropriate trade policies in supporting economic development in African countries.

Observation

The lack of competitiveness in poultry production in West Africa relative to 'other regions on the globe' can be seen as similar to the situation prevailing in regard to the EU's position. The principal difference being **the EU can afford to maintain a highly protectionist trade regime which raises market prices EU Europe**. EU consumers are seen as relatively better placed to bear these higher poultry meat prices, particularly since they remain substantially lower than alternative meat-based sources of protein. This managed EU trade regime in the poultry meat sector encourages investment and the development of supply chains which facilitate a move towards competitive production.

In an African context the situation in the Namibian poultry sector since 2013 is illustrative of what can be achieved in terms of investment promotion, when a managed poultry meat trade regime is established. Since 2013 Namibia has been able to develop poultry production to meet around 67% of national consumption needs³, despite the climatic and domestic feed production constraints. This has been achieved at marginal additional cost to Namibian consumers. The careful planning which went into the development of the Namibian poultry industry and the careful sequencing of production development with trade policy measures could hold important lessons for West African poultry sector development.

The need for a comprehensive integrated approach to poultry sector development is illustrated by the 'joined up' nature of the South Africa **Poultry Sector Master Plan**. This involves the coordinated development of the different policy interventions required to stimulate and sustain the development of the local poultry meat production and associated supply chains (from feed grain and oilseed production through investments in feed plants, to investments in effective phytosanitary protection systems for poultry producers). Central to this Master Plan however is a **strengthening of trade policy measures designed to prevent the entry onto the South African market of exceptionally low-priced poultry meat imports**. Such imports can undermine the market position of local producers and act as a major disincentive to investment.

The EC's response to South African efforts to use available trade policy tools to 'plug the gaps' in its existing poultry sector trade regime, has been to challenge such measures under article 34 of the EU-SADC EPA on a purely technical/legalistic basis (see epamonitoring.net article '**EU Formally Challenges Application of SACU Safeguard Duties in the Poultry Sector**', 27 June 2019). It was argued the South African measures were introduced under the provisions of the EU-South Africa TDCA, which by the time the approval process for the introduction of safeguard measures had been completed in South Africa, had been legally superseded by the EU-SADC EPA.

The SADC-EU EPA was signed on 10 June 2016 provisionally entered not force on 10 October 2016, the provisional South African safeguard duties meanwhile were introduced on 9 December 2016 after an 18 month process of consultations, review and deliberation in line with the statutory requirements for the implementation of such South African trade policy measures (see epamonitoring.net article '**Will South Africa's introduction of poultry safeguard duties be challenged by the EC?**', 23 February 2017). The EC argued the 'measure at issue was adopted by a different authority from the one which opened the investigation, and on a different legal basis', and furthermore the application of the measure now had a 'different geographic scope'.

The South Africa government safeguard measures need to be seen in the context of the complementary bilateral and multilateral measures taken to limited imports of poultry meat from Brazil and the USA and other supplies, none of which could be applied to imports from the EU.

As a consequence of this more comprehensive South African approach, the government has been successful in limiting imports from all major poultry meat exporters. The 'big-3' have not simply substituted for each other as was the case when only partial measures were applied. Rather market space has been created for renewed investment in the South African poultry meat sector.

³ economist.com.na, 'Broiler Industry Contributes 0.71% to GDP in 2017', 31 October 2018
<https://economist.com.na/39524/agriculture/broiler-industry-contributes-0-71-to-gdp-in-2017/>

Broiler industry contributes 0.71% to GDP in 2017

The effective trade policy introduced saw an overall decline in poultry meat imports in 2020 of around **10% a renewed expansion of the local South African poultry sector production**. This has encompassed a growth in both commercial and smallholder poultry production. This is occurring **despite the severe economic disruptions and challenges which the Covid-19 pandemic has generated in South Africa**.

The trade and general economic disruption generated by the Covid-19 pandemic is increasingly leading governments to look at how they can **'build back better'**. This includes in the case of the EU, exploring how essential supply chains can be repatriated to the national territory, thereby reducing their vulnerability to future disruptions. This has given rise to the concept of **'strategic autonomy'**.

Under this approach some sectors are seen as of such importance they should be classified as **'strategic autonomy'** sectors, subject to **special trade treatment** in order to encourage the repatriation of these supply chains to reduce vulnerability to trade disruptions.

The concept of **'strategic autonomy'** can be seen as particularly appropriate in sub-Saharan African agri-food sectors. Indeed, given the important contribution which it can make to **employment creation** and **income earning opportunities** in rural areas through its strong backward linkages, **the poultry sector can be seen as a 'strategic autonomy' sector to which special trade measures should be applied**.

In the coming period, the deployment of not only EU development assistance but wider EU policy initiatives and measures should be seen in this light. In particular there would appear to be a need for the EC to allow sub-Saharan African governments **the policy space required for the development of comprehensive and integrated approaches to poultry sector development**. Approaches aimed at progressively expanding African production to close the gap between domestic production and growing consumer demand so that dependence on imports is progressively reduced are increasingly finding favour.

Against this background as the EC points out, imports will continue to have an important role in meeting African demand for poultry meat in the coming years. However, it is essential these imports take place within a framework which **stimulates investment in integrated poultry supply chain development and ensures the safe delivery of imported poultry meat to African consumers**.

Questions to the European Commission:

Does the European Commission recognise that the market context faced is an important factor in incentivising or disincentivising investment in poultry sector development in sub-Saharan Africa?

Does the European Commission accept the need 'build back better' after the Covid-19 pandemic, so as to get more effectively to grips with the poverty challenges faced in sub-Saharan Africa?

Does the European Commission recognise the relevance of the 'strategic autonomy' concept developed by the EU during the Covid-19 crisis to the future of sub-Saharan African agri-food sector development?

Poultry Is Excluded from West Africa EPA Commitments, but....

The EC highlights how under the EU-West Africa EPA, poultry and other sensitive agri-food products are **excluded from the tariff liberalisation commitments** requested from West African governments. It is asserted that *'it is their full sovereign decision to set the tariff rates on EU imports at a level that would protect domestic producers against imports from the EU'*, even where this increases prices for local consumers.

The EC highlights how ‘currently, the tariffs applied to imports from the EU (and from the rest of the world) for poultry meat and poultry meat preparations range between 30-35%’, with these corresponding to ‘the Common External Tariff (CET) of the Economic Community of West African States (ECOWAS)’. However, it notes the tariff situation ‘in the poultry sector varies among the West African countries.’ It maintains ‘in the event of a sudden surge in imports of poultry meat, West African countries have the possibility to impose safeguards, i.e., temporarily raise import tariffs, following the procedures agreed to within the WTO.’

Observation

The EC implies EPAs in no way constrain sub-Saharan African poultry sector trade policy. However, where EU EPAs are fully in place (e.g., the EU-SADC EPA) this is far from an accurate reflection of the reality.

Under the EU's only fully implemented EPA, with South Africa (and now the wider SADC region), **serious constraints** are nominally placed on the ability of the concerned African governments to adopt comprehensive trade policy measures in support of national poultry sector master plans. This is despite the centrality of the EU's own poultry sector trade policy to the trajectory of EU poultry sector development.

The experience to date under the EU-South Africa trade agreement is that the provisions of these agreements can limit the government's policy space in 6 crucial areas.

- **Tariff standstill commitments**⁴: which prevent African governments using the ‘water’ in their WTO ‘bound’ tariffs, in response to global price volatility, on imports from the EU; this means any general tariff increases do not apply to the EU and so EU suppliers are able to replace other ‘big-3’ suppliers when higher MFN tariffs are applied.
- Commitments on the ‘**Prohibition of Quantitative Restrictions**’⁵: which seriously constrains the ability of African governments to use import prohibitions, such as TRQs, which are such a prominent feature of the EU's own poultry sector trade regime.
- The application of provisions on ‘**National Treatment on Internal Taxation and Regulation**’: which can be used to constrain the use of local procurement or regional preference regulations.
- The ineffective **anti-dumping provisions**: with the use of anti-dumping measures being limited by the need to comply with tariff standstill commitments, which means such measures need to be company and country specific; this poses serious challenges given the pan-European nature of many EU poultry companies, which see's national restrictions being circumvented by the initiation of exports from sister companies in other EU member states (thus where restrictions on imports from the Netherlands are applied, imports from neighbouring Belgium invariably increase).
- The application of **safeguard provisions**⁶: the provisions on safeguard measures constrain the scope and duration of such measures⁷, with in the case of South Africa the EC having chosen to challenge the application of these measures. This is being done on purely legalistic grounds, in ways which breach the spirit of such safeguard measures⁸.
- the application of **infant industry protection**⁹ measures: through limiting the scope of application and their duration of infant industry protection measures.

⁴ Under the SADC EPA Group-EU economic partnership agreement this is dealt with in Article 25.2 ‘**Customs Duties of the SADC EPA States on products originating in the EU**’ (the so called Tariff Standstill commitment), which states “For all products subject to liberalisation, no new customs duties shall be introduced, nor shall those already applied be increased in trade between the Parties as from the entry into force of this Agreement”, although certain exceptions are permitted linked to processes of tariffication and harmonization.

⁵ This is dealt with in Article 39: ‘**Prohibition of quantitative restrictions**’, which is somewhat different to similar provisions in other EPAs in that under the SADC EPA it simply states: “The Parties may apply quantitative restrictions provided such restrictions are applied in conformity with the WTO Agreement” and does not require the immediate abolition of such measures from the date of entry into force of the agreement.

⁶ This is dealt with under Article 35: ‘**Agricultural safeguards**’ and Article 37: ‘**BLNS transitional safeguards**’ and associated annexes.

⁷ This needs to be seen in the context of the EU's permanent use since the Uruguay Round of special safeguard measures in agricultural sectors, such as the poultry sector.

⁸ This seeks to exploit a loophole arising from the lengthy process required to invoke safeguard measures. This created a situation whereby although the safeguard action was initiated under the EU-South Africa TDCA, it was not completed under this agreement, but completion occurred 3 months after the initial agreement had nominally been superseded by the regional EU-SADC EPA. On this legalistic basis the EC is seeking to overturn the South African safeguard measures.

⁹ This is dealt with under Article 38 ‘**Infant Industry Protection Safeguards**’.

Thus, while there are a multitude of instruments nominally available to provide protection to African poultry producers, under the only EU EPA which has been fully implemented to date, the experience is that these measures are either ***largely ineffective*** or ***subject to challenge by the EC***, where they do prove effective.

Against this background, West African governments will need to look closely at the specific provisions of the EU-West Africa EPA which has nominally been concluded, in those areas which would impinge on the ***policy space for the implementation of comprehensive and integrated poultry sector development master plans***, including in regard to the design and application of appropriate ***trade policy measures to restrain imports from all of the 'big-3' poultry meat exporters***.

In the absence of such a review, poultry sector development in West Africa will have to wait until the expansion of poultry meat production in regions such as the EU reaches its limits and prices of imported poultry parts start to increase above their remarkably low levels. Only then would there be a commercial investment for investment in local poultry meat production in West Africa.

Waiting until this happens can be seen as ***lost years for the structural development of sub-Saharan African poultry sectors***.

Questions to the European Commission:

Given the constraints which the interpretation of the provisions of existing EPAs can place on the development of comprehensive and integrated poultry sector development plans in sub-Saharan Africa, ***is the European Commission open to a 'light and flexible' interpretation and application of these provisions, where comprehensive and integrated national and regional poultry sector development plans are under development?***

Annex

EU Export of Frozen Chicken Meat and Offal (gallus) to West African countries and South Africa 2013-2020 (tonnes)

	2013	2014	2015	2016	2017	2018	2019	2020	% change
Ghana	63,856	49,174	68,467	105,215	137,288	153,666	173,602	198,043	+210.1%
Liberia	10,669	10,185	16,649	18,786	33,596	19,130	20,812	25,038	+134.7%
Benin	91,386	115,287	100,542	78,308	67,075	56,080	47,688	28,495	-68.8%
Guinea	3,971	4,111	6,729	8,871	16,116	22,212	23,527	23,440	+490.3%
Sierra Leo.	2,256	1,544	2,390	1,735	5,230	8,646	8,618	12,593	+458.2%
Togo	13,221	13,531	15,139	16,792	14,853	17,019	17,384	11,328	-14.3%
Cape Ver.	2,699	3,473	5,205	7,492	9,835	10,369	10,592	9,544	+253.6%
Ivory Coast	417	527	977	1,812	4,044	6,784	3,827	3,566	+755.2%
Sao Tomé	1,373	1,991	1,893	1,723	1,713	1,847	2,386	2,462	+79.3%
Niger	3,804	5,162	4,365	3,361	1,601	1,285	1,856	2,294	-39.7%
Guin Biss	469	582	1,500	2,071	3,591	2,914	2,256	2,232	+375.9%
Gambia	16	33	324	165	4,305	1,221	1,573	1,642	+925%
Mauritania	177	738	1,053	2,070	8,716	6,846	2,691	269	+52.0%
Burk. Faso	5	0	52	109	96	117	85	146	+2,820%
Senegal	28	77	75	96	159	37	145	70	+150%
Nigeria	96	245	103	212	139	338	326	69	-28.1%
Mali	107	5	8	38	16	38	49	56	-47.7%
West Africa	194,550	206,666	225,417	248,855	308,372	308,550	317,417	321,288	+65.1%
% share	18.4%	18.4%	19.7%	19.6%	24.3%	22.4%	21.4%	22.0%	
South Africa	139,872	189,578	202,136	262,261	73,050	76,517	117,348	77,497	
% share	13.3%	16.9%	17.6%	20.6%	5.7%	5.6%	7.9%	5.3%	
Total EU	1,055,206	1,120,490	1,146,613	1,270,472	1,267,746	1,375,734	1,481,616	1,458,601	+38.2%

Average Prices Euro per kg of EU Frozen Chicken Meat Exports

	2012	2013	2014	2015	2016	2017	2018	2019	2020	% change
Ghana	€0.77	€0.79	€0.71	€0.73	€0.66	€0.70	€0.71	€0.78	€0.76	-1.3%
Benin	€1.28	€1.24	€1.23	€1.17	€0.70	€0.88	€0.87	€0.97	€0.88	-31.2%
Togo	€1.13	€1.09	€1.03	€1.00	€0.73	€0.81	€0.79	€0.84	€0.90	-20.4%
Liberia	€0.58	€0.57	€0.59	€0.58	€0.47	€0.54	€0.47	€0.46	€0.47	-6.0%
Niger	€1.24	€1.23	€1.19	€1.22	€0.76	€0.91	€0.88	€1.02	€0.93	-25.0%
Guinea	€1.20	€1.21	€1.20	€1.15	€0.69	€0.82	€0.81	€0.89	€0.87	-27.5%
Cape Ver.	€1.40	€1.31	€1.05	€0.95	€0.91	€0.88	€0.86	€0.99	€0.89	-36.4%
Sierra Leo.	€0.53	€0.63	€0.68	€0.66	€0.49	€0.54	€0.57	€0.58	€0.52	-1.9%
Ivory Coast	€1.10	€0.87	€1.20	€1.16	€0.90	€0.89	€0.84	€0.88	€0.82	-26.5%
Mauritania	€1.56	€1.28	€2.01	€0.98	€0.80	€0.86	€0.80	€0.88	€1.38	-11.5%
Guin Biss	€1.24	€1.25	€1.16	€1.00	€0.79	€0.89	€0.93	€1.02	€1.01	-18.6%
Nigeria	€1.86	€1.43	€1.24	€1.49	€0.90	€1.21	€1.24	€1.63	€1.97	+5.9%
Senegal	€2.61	€2.66	€1.44	€1.50	€1.80	€1.33	€3.18	€1.22	€1.17	-55.2%
Gambia	€1.30	€1.25	€1.41	€0.91	€0.74	€0.90	€0.70	€0.81	€0.89	-31.5%
Mali	-	€1.80	€4.96	€2.02	€1.25	€3.49	€2.18	€1.73	€1.74	-3.4%
Burk. Faso	€2.18	-	-	€1.38	€0.85	€1.23	€0.90	€1.31	€1.73	-20.6%
South Africa	€1.15	105	96	100	83	119	103	94	92	-20%