

The key numbers

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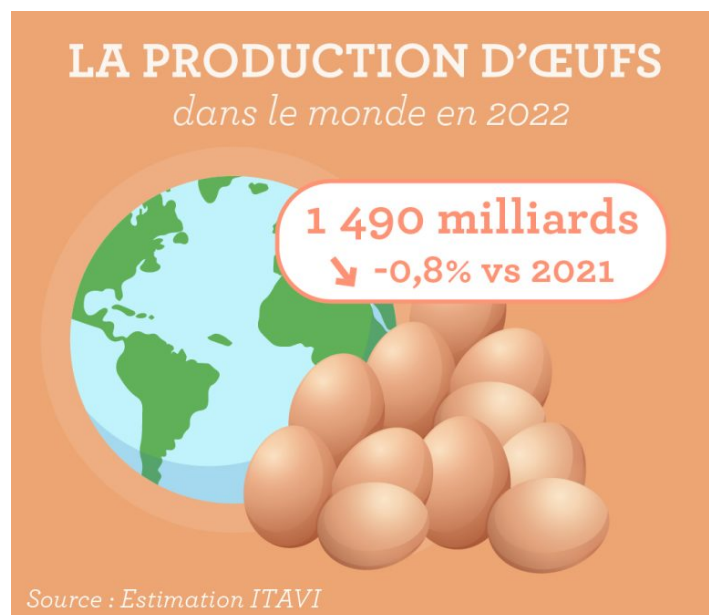
French and global egg production disrupted by avian influenza

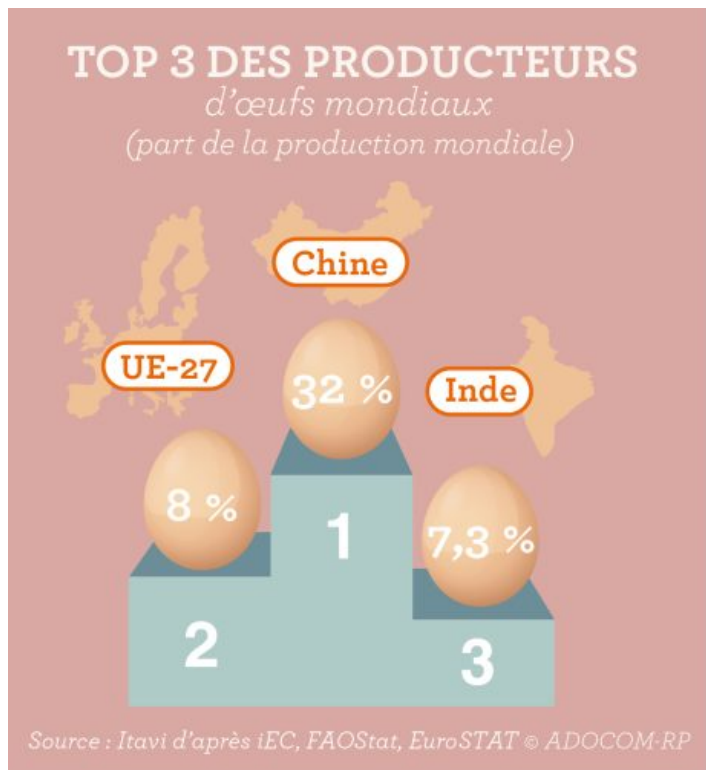
Global production reduced to 1,490 billion eggs in 2022

In 2022, global production of table eggs from hens estimated by ITAVI from available data (FAO, IEC, Eurostat and national sources) stood at nearly 79.6 million tonnes of shell egg equivalent (TSEE), or approximately 1,490 billion eggs, down 0.8% compared to 2021, notably linked to the decline in the United States (-3.1%) and the EU-27 (-0.6%).

Indeed, in 2022, the inflationary trend, the war in Ukraine and avian influenza have disrupted the global market with contrasting impacts. Since the beginning of 2022, more than 60 million laying hens have been affected by the epizootic worldwide. The USA remains by far the most impacted country, with 45 million layers affected.

With 25.5 million tonnes produced in 2022, China alone accounted for 32% of global production. It is followed by the EU-27, which accounts for 8% of global production and by India (7.3%), which takes 3rd place in the USA (7.2%).

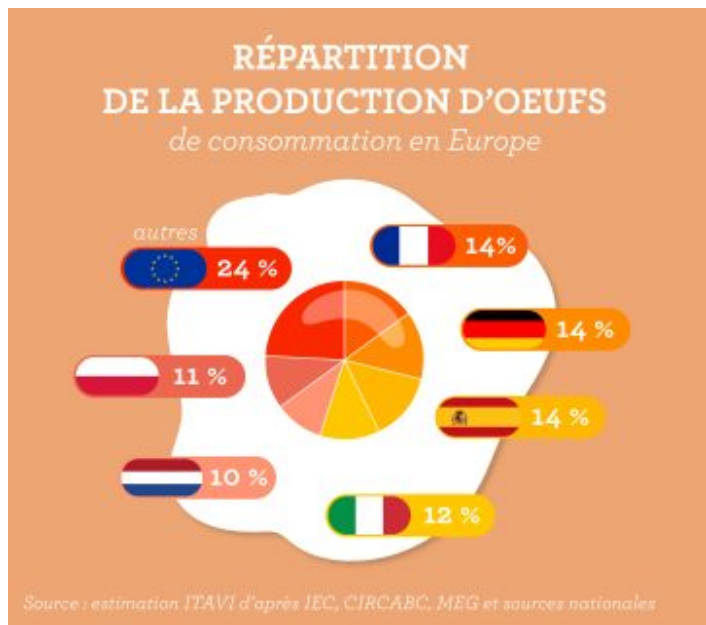




France shares its place as number 1 in production in Europe

In 2022, France produced 14.4 billion eggs (896,000 tonnes), a decrease of 1.2 billion eggs compared to 2021 due to avian influenza. France now shares its 1st place among egg-producing countries in the European Union (around 14% of production in 2022), with Germany and Spain.

(Source: ITAVI estimates)



A drop in egg production in France marked by avian influenza

(Source: ITAVI estimates)

Since November 2021, more than 15 million laying hens and pullets have been decimated in Europe by avian influenza, representing almost 5% of the Community potential. France is the most affected country in Europe, with more than 4.5 million laying hens and pullets affected by the epizootic, or 9.5% of the livestock. Thus, over the whole of 2022, according to Itavi estimates, production fell by 8% to 14.4 billion eggs. This estimate takes into account the hens and pullets affected by the measures linked to avian influenza, the slowdown in implementations in the areas concerned as well as the lengthening of the laying period in certain batches.

2023: a recovery slowed by new cases of avian influenza

Recovery is difficult in 2023. Since the beginning of the year, 1 outbreak in a farm in Deux-Sèvres and 18 outbreaks have been detected on chicken and pullet farms in Côtes-d'Armor. This department accounts for 21% of French laying hens and 21% of breeders. France has thus lost 1.1 million laying hens and around 200,000 pullets due to avian influenza. These losses represent a reduction in production of 28 million eggs per month.

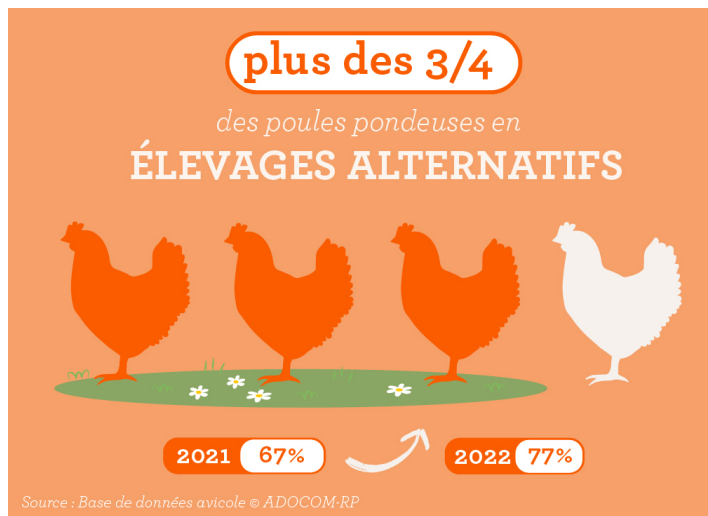
A return to pre-crisis production levels is not expected to occur before autumn 2023. ITAVI estimates that egg production should increase by 5% in 2023 compared to 2022, and thus remain 4% lower than 2021 production.

Alternative livestock farming: France above the European average

As early as 2016, French egg professionals set themselves the ambitious goal of achieving 50% of alternative production to furnished cages by 2022. A goal that they managed to achieve three years ahead of the scheduled deadline, in 2019, with 53% of hens in alternative systems vs. 36.7% in 2017.

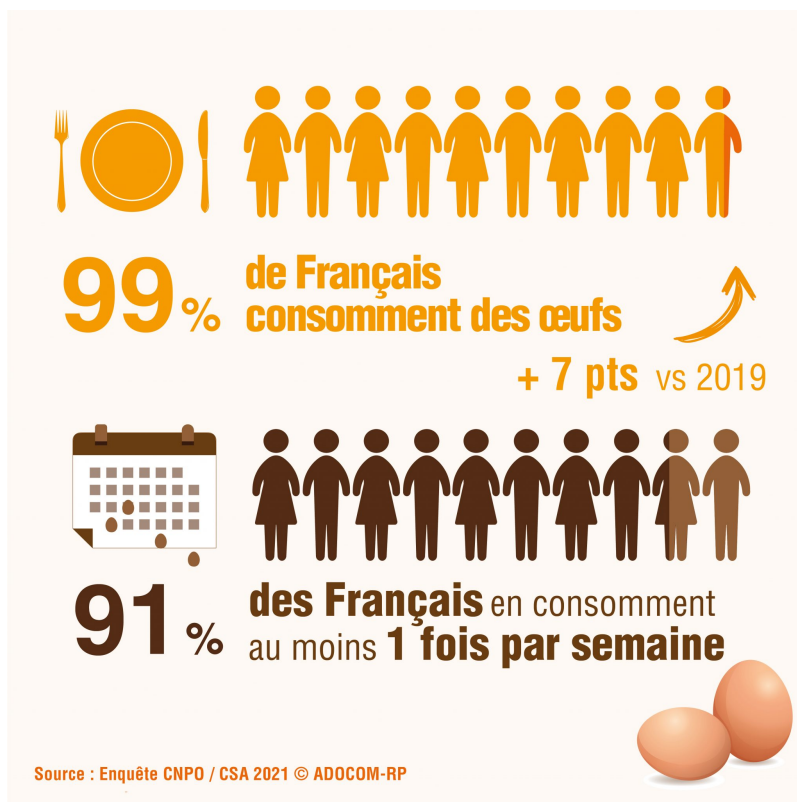
In 2021, alternative systems to cages (floor, free-range and organic) represented on average 58% of the laying hens in the European Union, while this share was 67% for France over the period. It even rose to 77% at the end of 2022. Now, less than 1 in 4 hens are raised in furnished cages in France.

(Source: European Commission, CNPO)



99% of French people eat eggs!

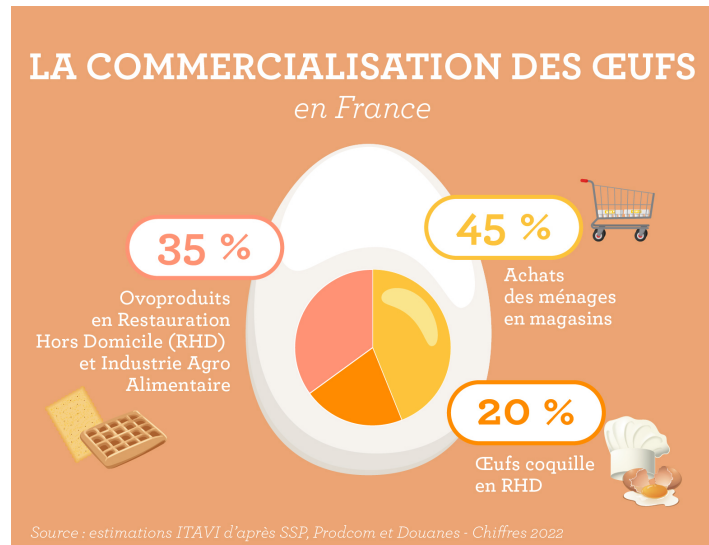
Eggs have become inseparable from the daily lives of the French, among whom they are increasingly present! According to the latest survey conducted by CSA for the CNPO, almost all French people – 99% – now say they eat eggs. They were 98% in 2019 and 96% in the previous survey in 2017.



CSA survey for the National Committee for the Promotion of Eggs (CNPO), conducted from April 29 to May 10, 2021 among a nationally representative sample of 1,007 French people aged 18 and over.

Annual consumption of 220 eggs per capita in 2022

In France, the overall egg consumption per capita is 220 eggs in 2022. In this consumption, the share of egg products amounts to 35%, shell eggs used in catering outside the home to 20% and, finally, household purchases in stores 45%. The total egg consumption of each French person is thus more than 4 eggs per week, whether at home or outside the home, in the form of egg products or shell eggs.



96.5% of households are buyers

The shell egg is a basic product consumed by a large majority of French people, with a purchasing household rate of 96.5% in 2022 according to the Kantar consumer panel, i.e. +0.4 points vs 2021 (penetration rate).

96,5% des ménages

ACHETEURS



Source : Panel Kantar 2022 - Taux de pénétration

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(Source: Kantar Panel)

The French are multiplying the eggs in their baskets!

In a context of falling purchasing power, egg consumption shows no sign of declining in household purchases; on the contrary, they confirm their place among the essential products of the kitchen.

In 2022 compared to 2021, household purchases increased by +0.7% compared to 2021, driven by the increase in purchases of barn eggs (+23.3%) and free-range eggs (+6.4% excluding Label Rouge).

In 2023, over the first two months of the year, household egg purchases increased by +5.9% across all farming methods, compared to the same period in 2022.

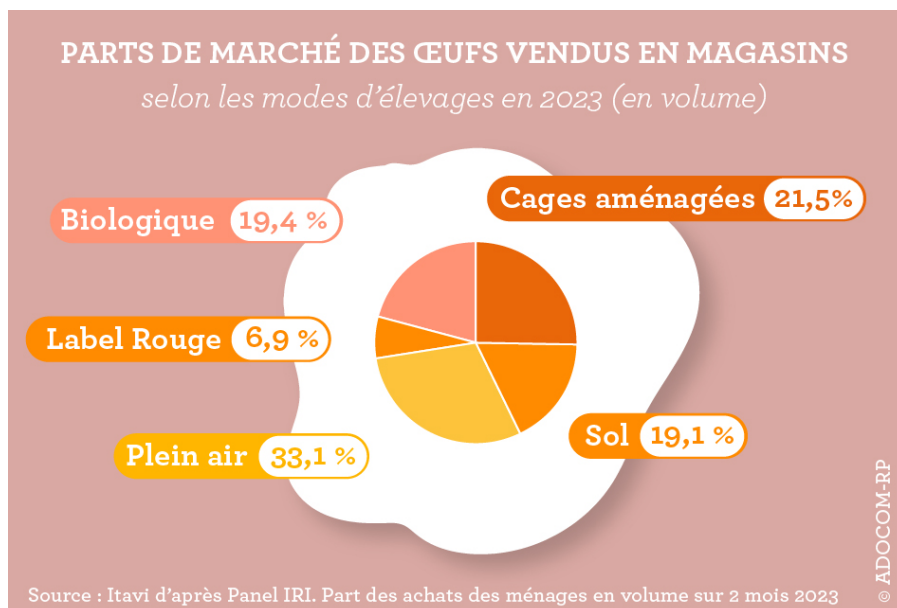


Source: ITAVI based on IRI Panel

Alternative eggs in 2023: almost 8 out of 10 eggs purchased

In 2022, alternative eggs accounted for more than $\frac{3}{4}$ of eggs purchased in stores (75.2%). In the first two months of 2023, they increased to almost 8 out of 10 (78.5%).

Free-range eggs (excluding Label Rouge) come in first in this category, with a 33.1% market share over the first two months of 2023 (30.5% over the year 2022), followed by organic eggs (19.4% over 2 months of 2023 and 20.3% in 2022) then eggs from barn hens (19.1% over 2 months of 2023; 17.9% in 2022) and Label Rouge eggs (6.9% over 2 months of 2023 and 6.6% in 2022).



(Source: FranceAgriMer according to IRI)

Barrier eggs continue to gain ground

The increase in egg sales in supermarkets is driven by the growth of alternative eggs, with a record increase in sales of eggs from barn hens.

Eggs from barn hens recorded the strongest increase in sales, at +65% over the first two months of 2023 compared to the first two months of 2022 (+23.3% in 2022 vs. 2021), followed by free-range (+33.6% in 2023; +6.4% in 2022) and Label Rouge (+5.4% in 2023; -3.6% in 2022).

Sales of organic eggs, after falling by 5.8% in 2022 compared to 2021, appear to be stabilizing in early 2023.

(Source: FranceAgriMer according to IRI)

