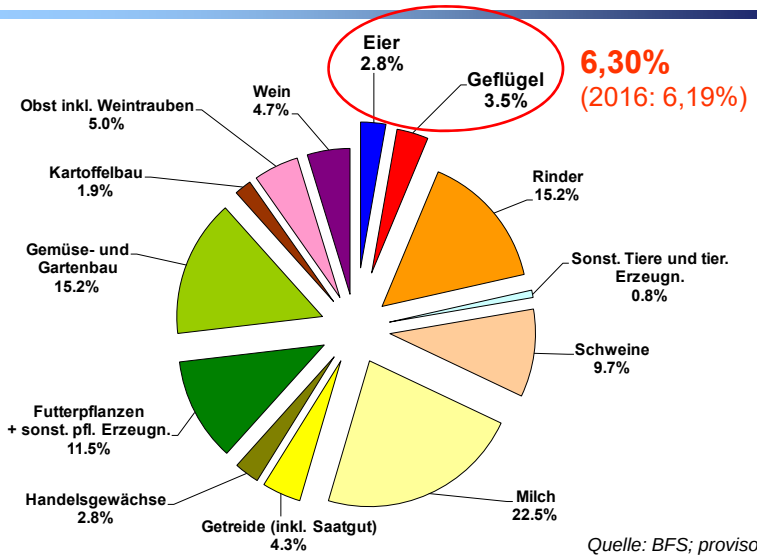
Eier- und Geflügelmarkt 2017: Inlandproduktion, Importe, Konsum, Tierbestände

Aviforum, Zollikofen

Stand: 5. Juni 2018

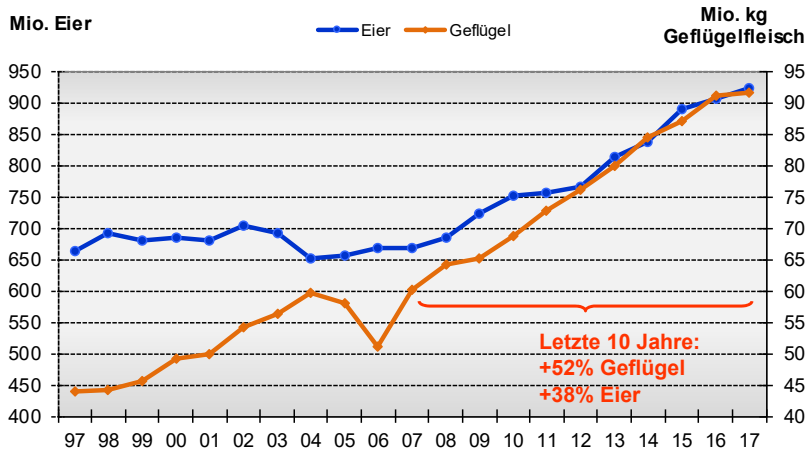
Produktionswert CH-Landwirtschaft 2017



6,30%
(2016: 6,19%)

Quelle: BFS; provisorisch

Entwicklung der CH-Eier-und Geflügelfleischproduktion



Quelle: Aviforum / Agristat

Eiermarkt 2017

(Eier: in Mio. Stück bzw. Stück pro Kopf)

	2016	2017	+/-
CH-Eierproduktion	906.6	923.2	1.8%
Import Konsumeier	237.6	230.7	-2.9%
Import Verarbeitungseier	176.4	187.2	6.1%
Import Eiprodukte	175.2	169.7	-3.1%
davon flüssige	126.7	123.5	-2.5%
davon Eipulver	48.6	46.2	-4.7%
Inlandanteil Schaleneier	77.8%	78.6%	0.8
Inlandanteil-Gesamtkonsum	60.6%	61.1%	0.5
Pro-Kopf-Konsum Eier	176.6	176.9	0.3
Pro-Kopf-Konsum CH-Eier	107.0	108.1	1.1

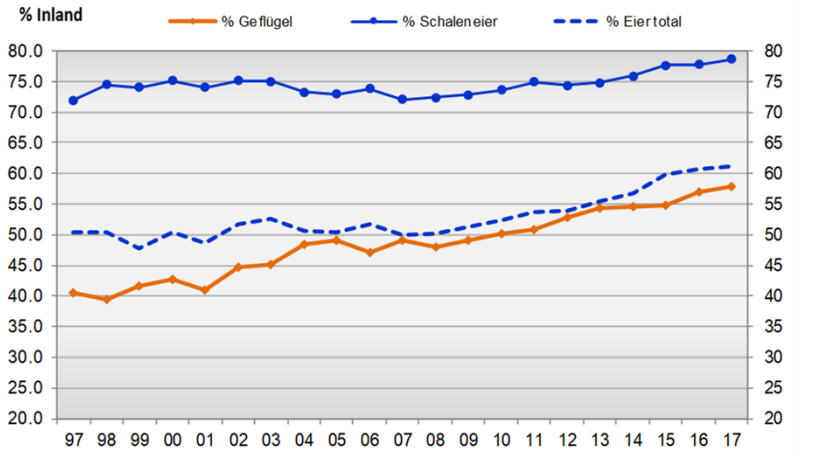
Quelle: BLW / EZV / Aviforum

Geflügelfleischmarkt 2017

	2016	2017	+/-
CH-Geflügelfleischproduktion (SG), t	91'114	91'483	0.4%
CH-Geflügelfleisch (verkaufsfertig), t	58'218	58'475	0.4%
Import Geflügelfleisch (verkaufsfertig), t	45'261	44'313	-2.1%
Importüberschuss Geflügel (verkaufsf.), t	43'845	42'587	-2.9%
Pro-Kopf-Konsum verkaufsfertig, kg	12.05	11.83	-0.22
Pro-Kopf-Konsum Schlachtgewicht, kg	18.86	18.51	-0.34
Inlandanteil%	57.04%	57.86%	0.82

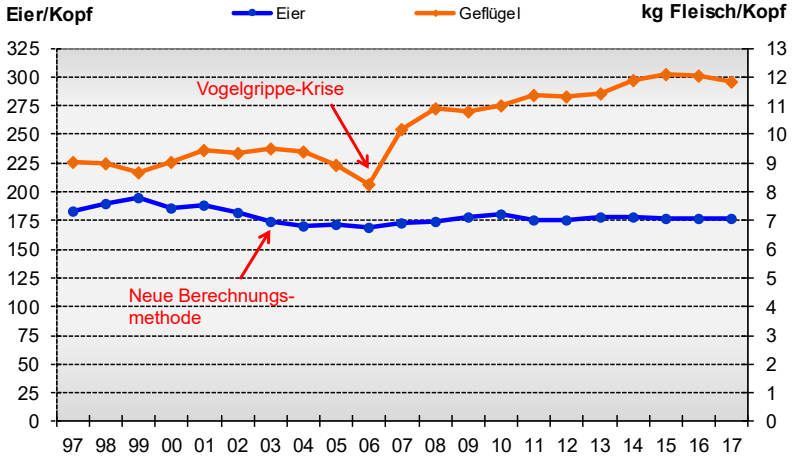
Quelle: Agristat / EZV

Entwicklung des CH-Inlandanteils Eier und Geflügel



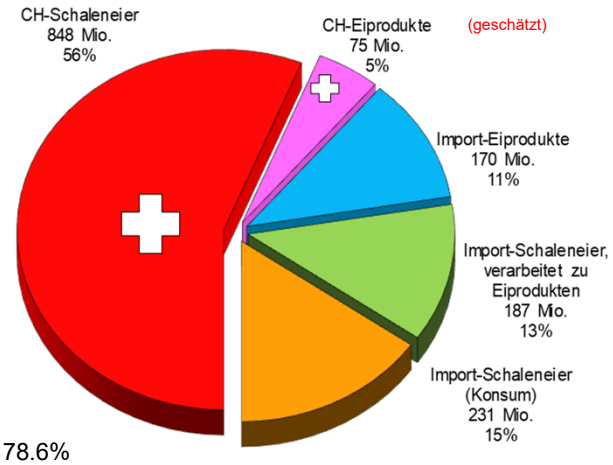
Quelle: Aviforum / Agristat

Entwicklung CH-Pro-Kopf-Konsum Eier und Geflügelfleisch



Quelle: Aviforum / Agristat

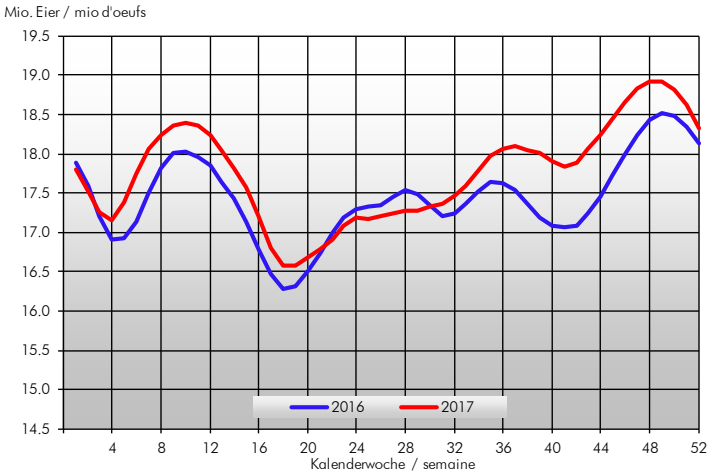
Eier-Gesamtverbrauch 2017



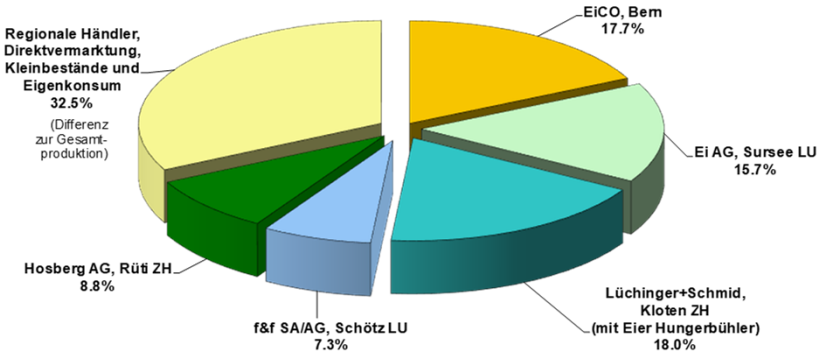
Inlandanteil:
Schaleneier: 78.6%
Total: 61.1%

Quelle: Aviforum / BLW / EZV

Saisonalität CH-Eierproduktion



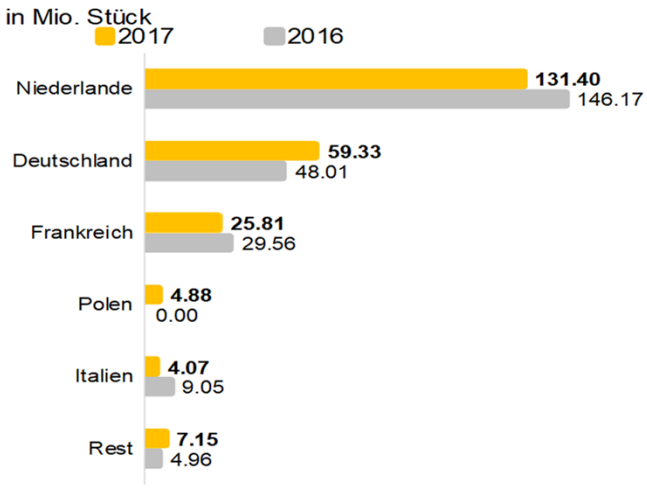
Anteile an der CH-Eierproduktion* 2017



*Anteile der Eigenproduktion an der CH-Gesamtproduktion (inkl. Nebensorten), ohne Zukäufe und Handel

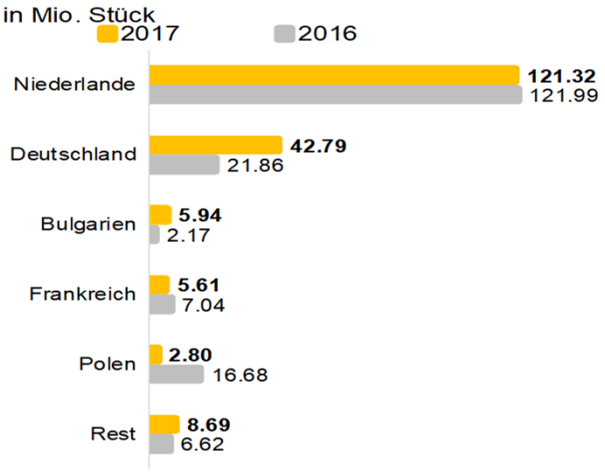
Quelle: Aviforum (Befragung der Eiervermarkter)

Herkunft Konsumeier-Importe 2017



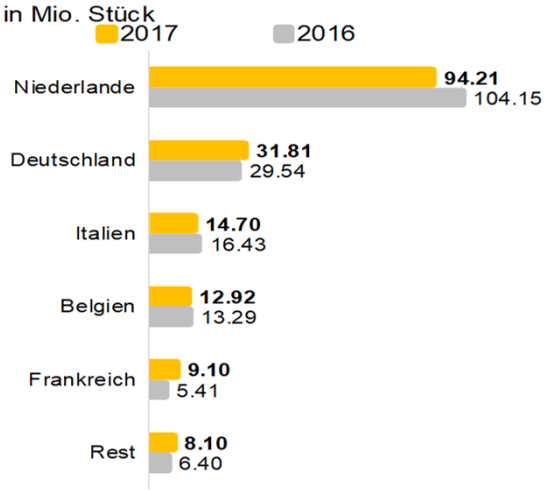
Quellen: BLW, Fachbereich Marktanalysen; EZV

Herkunft Verarbeitungseier-Importe 2017



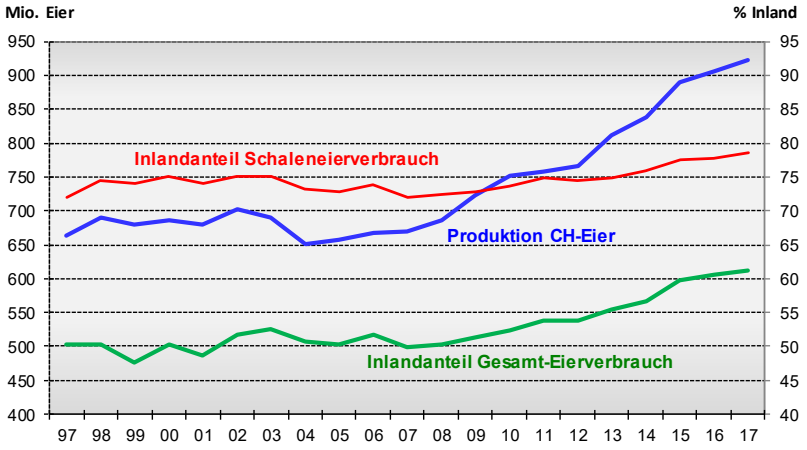
Quellen: BLW, Fachbereich Marktanalysen; EZV

Herkunft Eiprodukte-Importe 2017



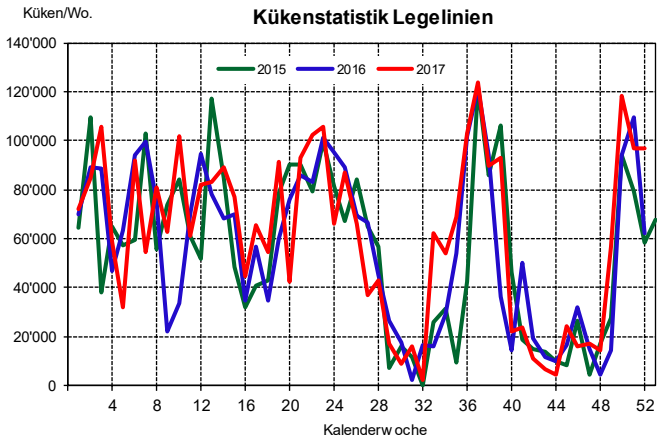
Quellen: BLW, Fachbereich Marktanalysen; EZV

Entwicklung Eiermarkt



Quelle: Aviforum / BLW / EZV

Entwicklung Legeküken-Einstallungen

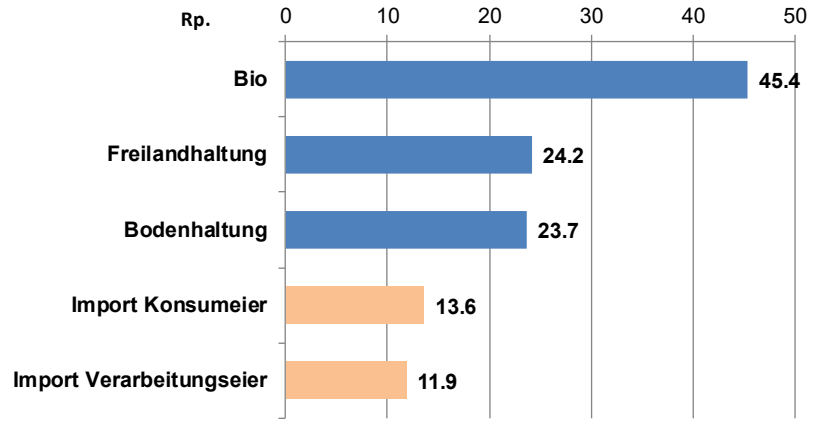


Marktentlastungs-massnahmen Eier

Jahr	Aufschlag (Mio. Eier)	Verbilligung (Mio.Eier)	Bundesbeitrag (Mio.Fr.)
2007	7.44	10.32	1.19
2008	8.38	14.08	1.46
2009	7.66	20.44	1.71
2010	17.71	11.49	2.00
2011	15.36	9.02	1.83
2012	13.06	8.87	1.62
2013	13.34	7.38	1.57
2014	11.83	5.44	1.34
2015	15.86	8.02	1.83
2016	14.46	7.88	1.70
2017	**16.67**	**8.00**	**1.90**

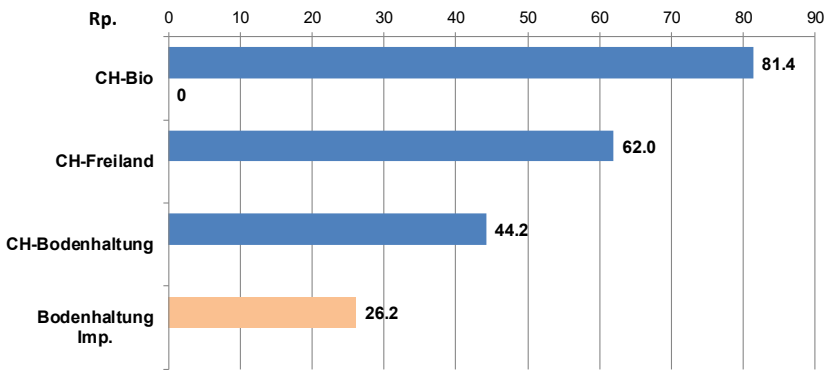
Quelle: BLW

Eierpreise 2017
Produzent (>53g) / Import



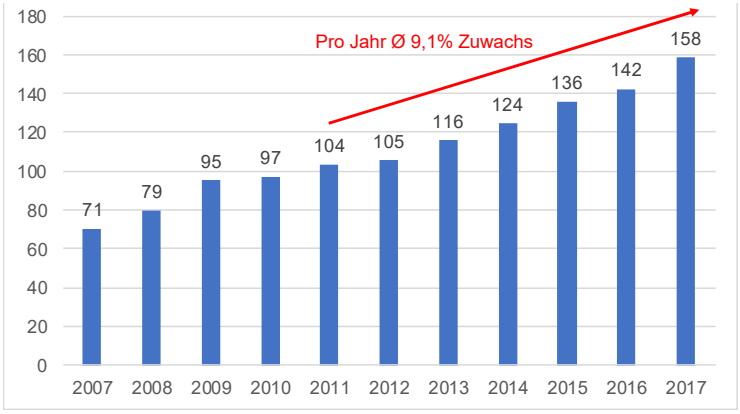
Quelle: BLW

Eierpreise 2017
Konsument (frisch, >53g)



Quelle: BLW

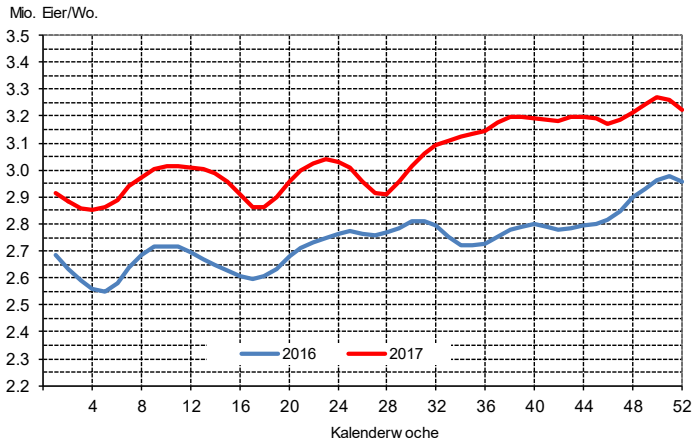
Produktions-entwicklung Bio-Eier (Mio. Stk.)



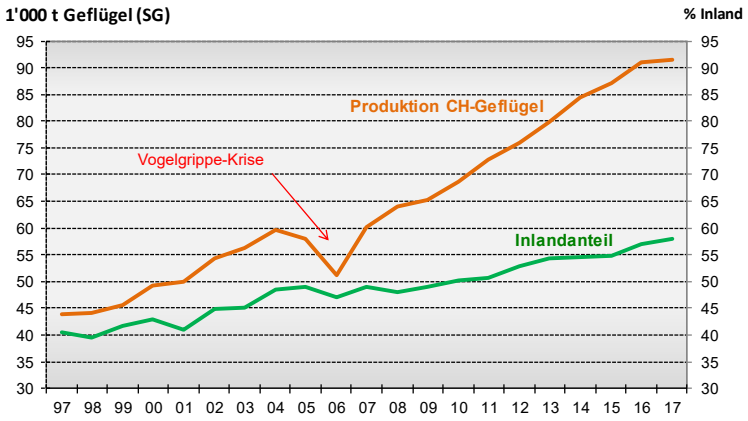
Anteil Bio an der gesamten CH-Eierproduktion 2017: 17,2%

Quelle: Aviforum

Saisonalität Bio-Eierproduktion



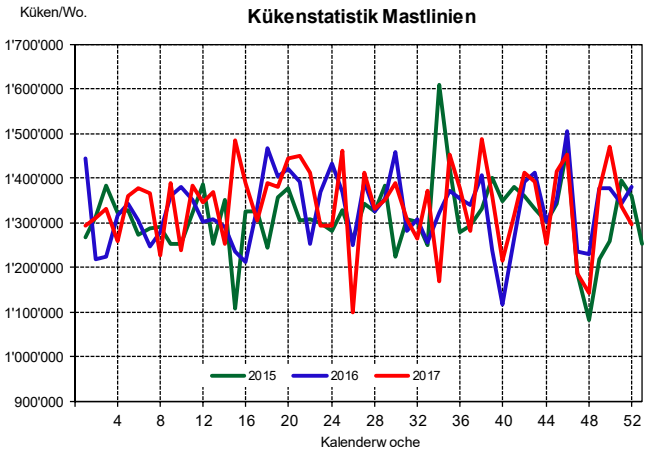
Entwicklung CH-Geflügelfleisch-produktion und Inlandanteil



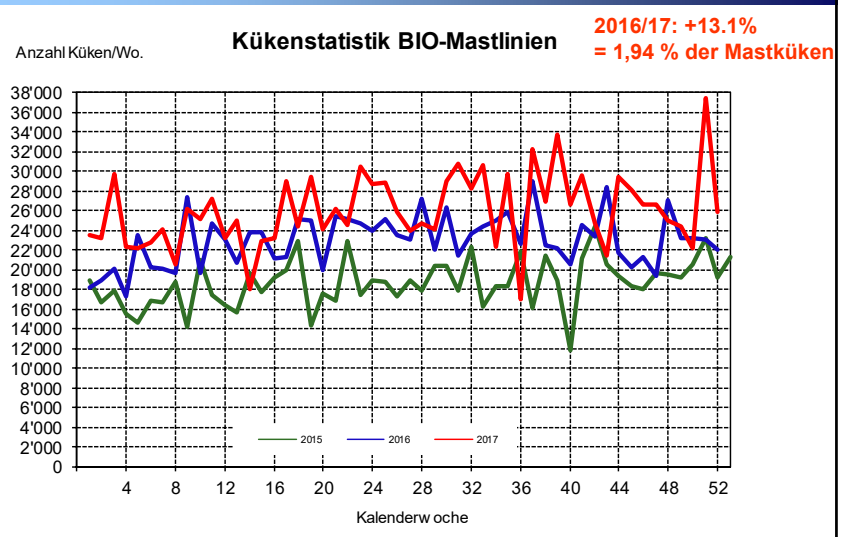
Quelle: Agristat

Mastküken-Produktion total

2016/17: +0.7%

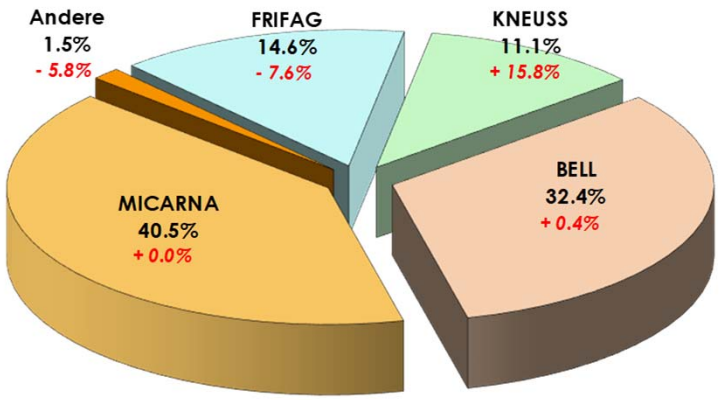


Mastküken-Produktion Bio



CH-**Poulet**produktion 2017

(mit Veränderung 16/17)



Quelle: Agristat

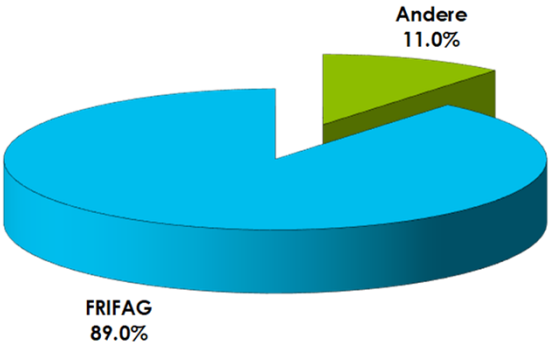
CH-**Truten**produktion 2017

Daten 2017:
Produktion (Schlachtgew.):
1'888 t (+8% gg. 2016)

Anteil an Inland-produktion Geflügel: **2,3%**

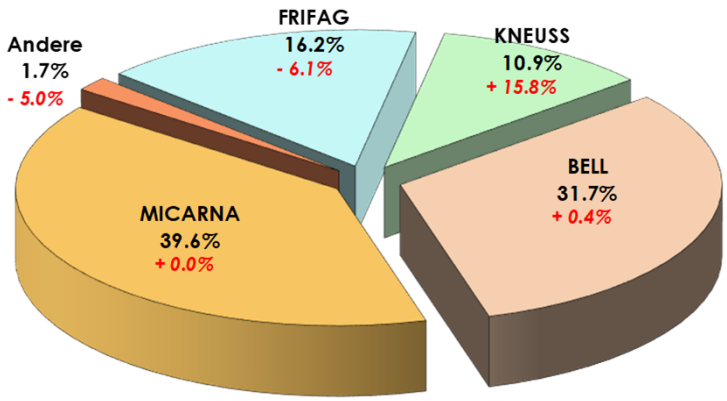
Anteil am Geflügel-konsum: ca. **9%**

Inlandanteil: ca. **15,1%**



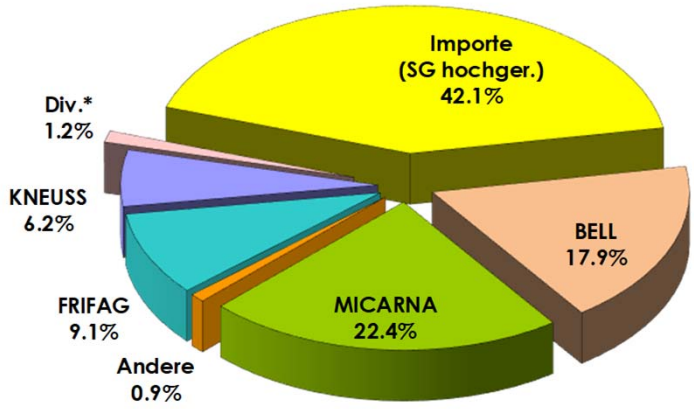
Quelle: Agristat / EZV

Geflügelfleischproduktion 2017
(mit Veränderung 16/17)



Quelle: Agristat

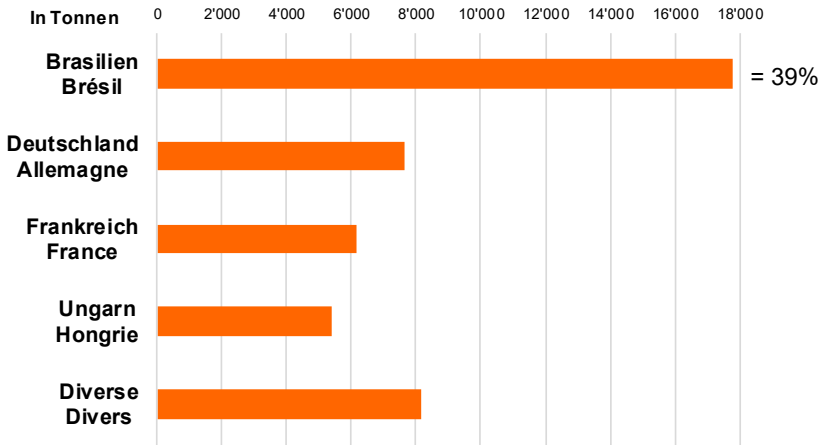
CH-Geflügelfleischmarkt 2017



*) Suppenhennen sowie geschätzte Mengen (Eigenverbrauch, Direktvermarktung der Produzenten)

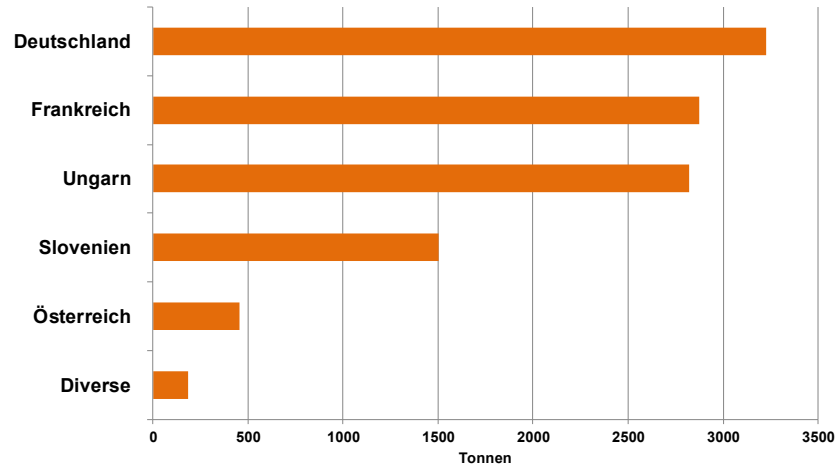
Quelle: Agristat

Herkunft Geflügelimporte total, 2017



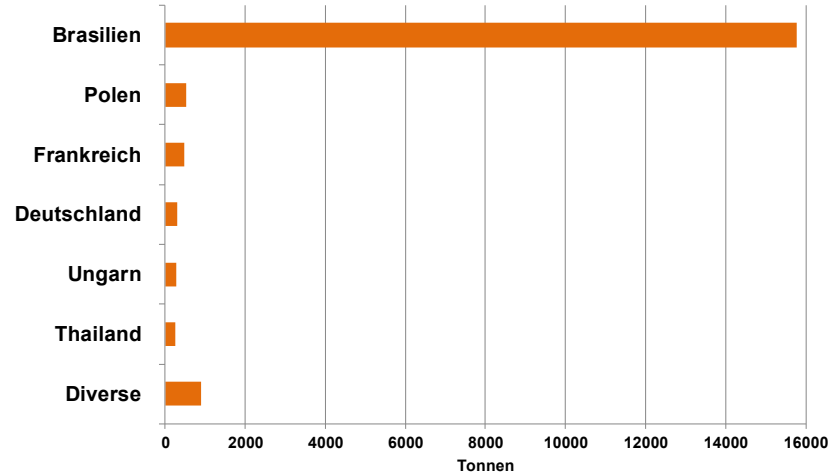
Quelle: Proviande / EZV

Herkunft Importe Pouletfleisch frisch 2017



Quelle: EZV

Herkunft Importe Pouletfleisch gefroren 2017



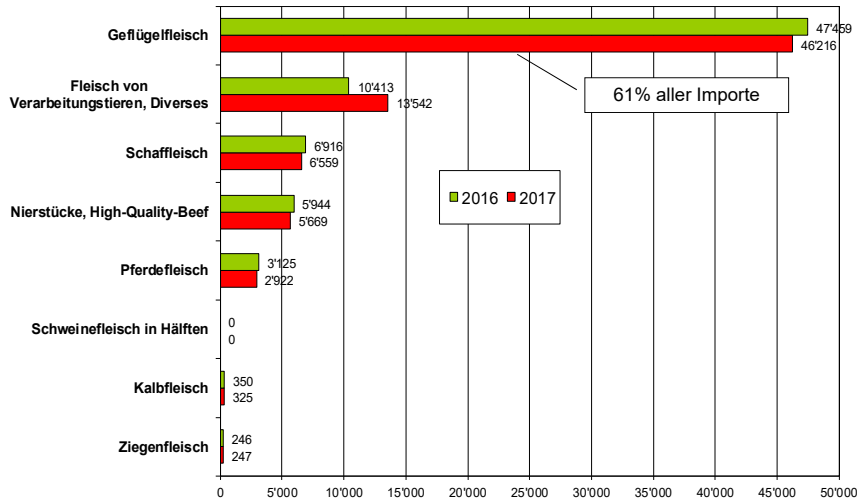
Quelle: EZV

Versteigerung Geflügelfleisch 2015 -17

	Quartal	Menge (t)	Anz. Firmen	Min. Preis (CHF/kg)	Ø Preis (CHF/kg)	Summe (CHF)
2015	1	12'500	75	2.04	2.05	25'625'000
	2	13'000	77	2.04	2.05	26'650'000
	3	11'000	73	2.04	2.05	22'550'000
	4	12'500	77	2.05	2.06	25'750'000
	4. Zusatz	*500*	*21*	*2.08*	*2.31*	*1'155'000*
	Total	**49'500**			**2.06**	**101'730'000**
2016	1	12'750	80	2.04	2.05	26'137'500
	2	11'750	88	2.04	2.05	24'087'500
	3	11'500	82	2.04	2.05	23'575'000
	4	11'500	84	2.04	2.05	23'575'000
	Total	**47'500**			**2.05**	**97'375'000**
2017	1	10750	85	2.04	2.07	22'252'500
	2	11'500	82	2.07	2.08	23'920'000
	2. Zusatz	*200*	*22*	*2.07*	*2.10*	*420'000*
	3	12'300	64	2.06	2.09	25'707'000
	4	11'500	90	2.05	2.08	23'920'000
	Total	**46'250**			**2.08**	**96'219'500**

Quelle: BLW

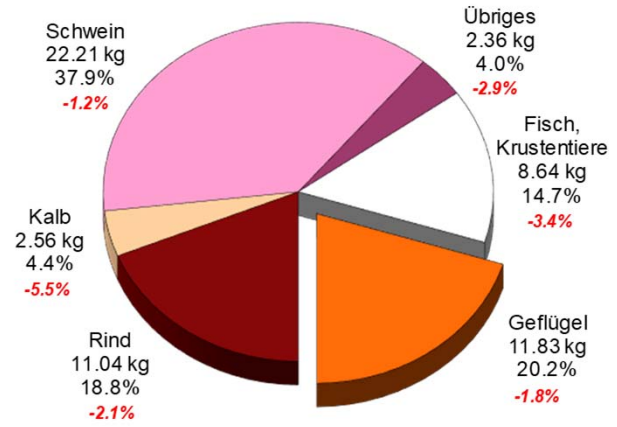
CH-Fleischimporte Tonnen (16/17)



Quelle: BLW

Fleischkonsum 2017

(verkaufsfertiges Fleisch)
(inkl. Entwicklung 16/17)

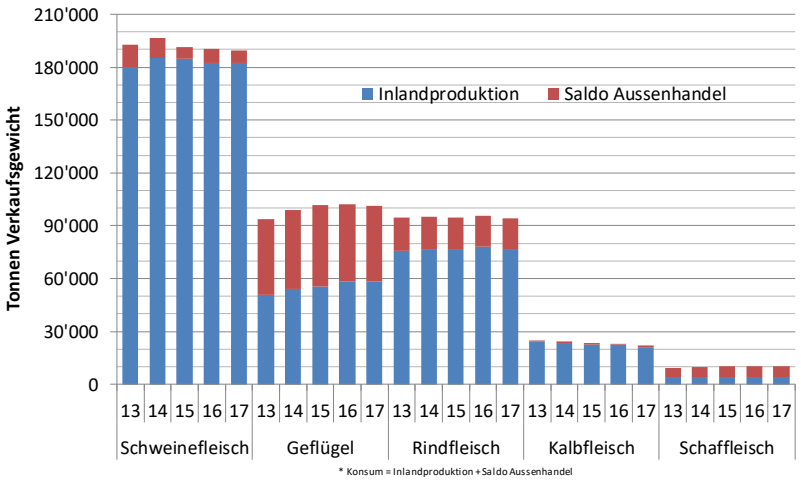


Pro-Kopf-Konsum Geflügel Basis Schlachtgewicht: 18.5 kg

Selbstversorgungsgrad Geflügelfleisch: 57,9%

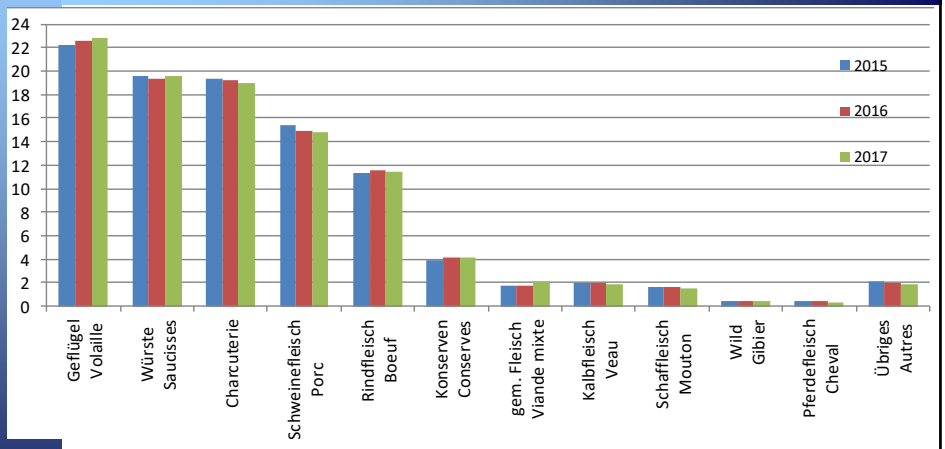
Quelle: Proviande

Entwicklung Fleischkonsum



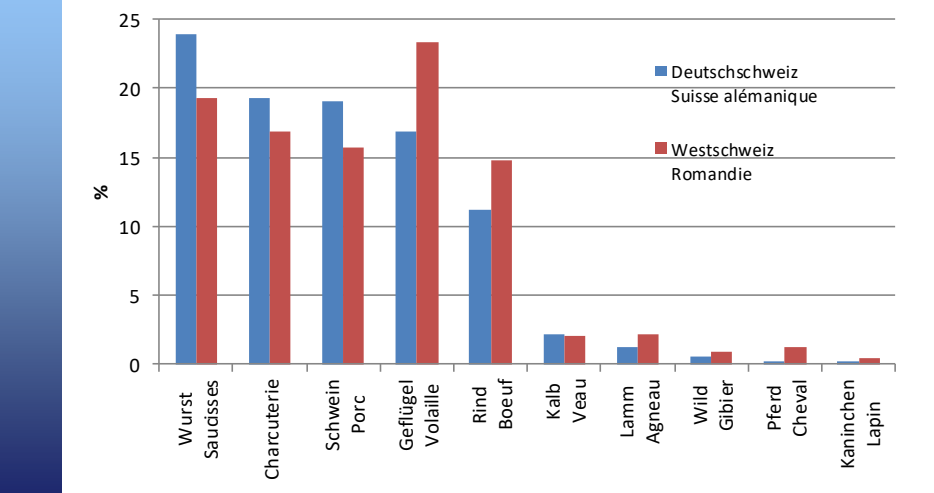
Quelle: Proviande

%-Anteil der Fleischarten am gesamten Fleischkonsum der privaten Haushalte



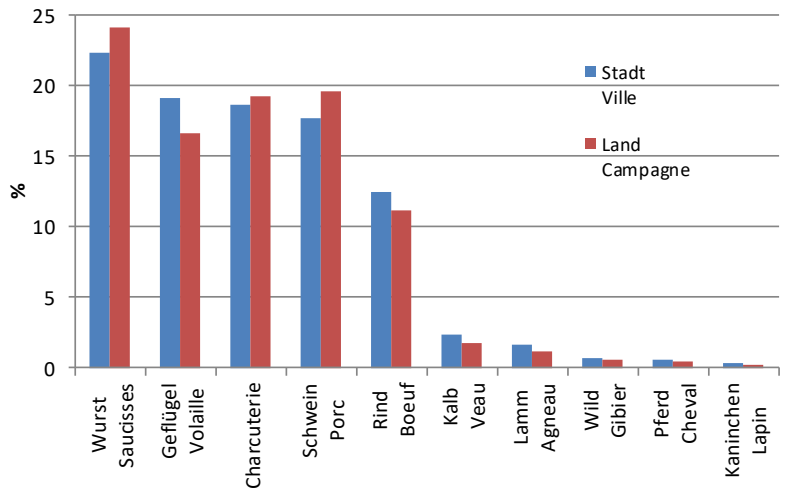
Quelle: Proviande/Nielsen

Beliebtheit der im Detailhandel gekauften Fleischarten 2017 (1)



Quelle: Proviande/Nielsen

Beliebtheit der im Detailhandel gekauften Fleischarten 2017 (2)



Quelle: Proviande/Nielsen

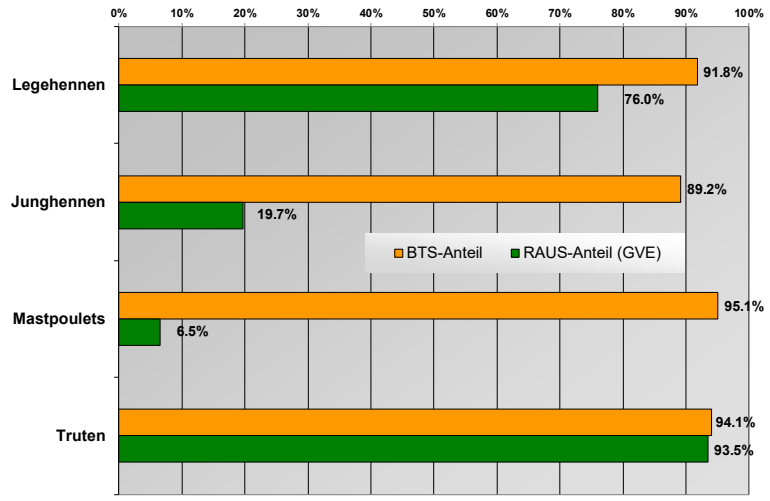
Tierbestände (BfS)

(Hennen: in Mio.)

	2015	2016	2017
Gesamt-Hühnerbestand	10.80	10.89	11.40
Legehennen	2.65	2.86	2.88
Legeküken und Junghennen	1.03	0.96	1.08
Mastpoulets	6.90	6.88	7.15
Nutzhühnerhalter	13'176	13'491	13'959

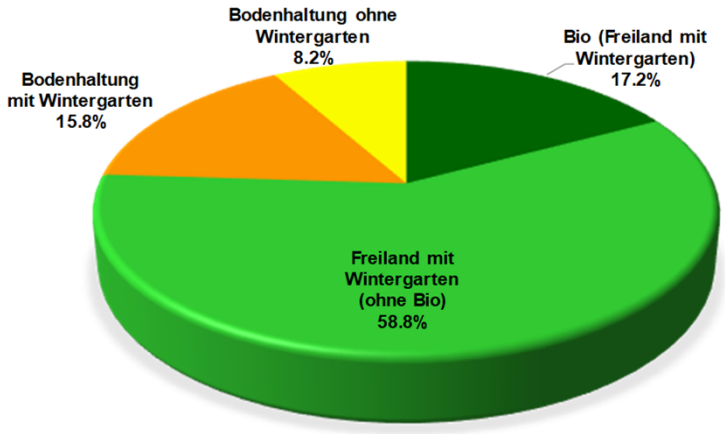
Quelle: BFS

BTS-/RAUS-Anteil 2016 (GVE)



Quelle: BLW

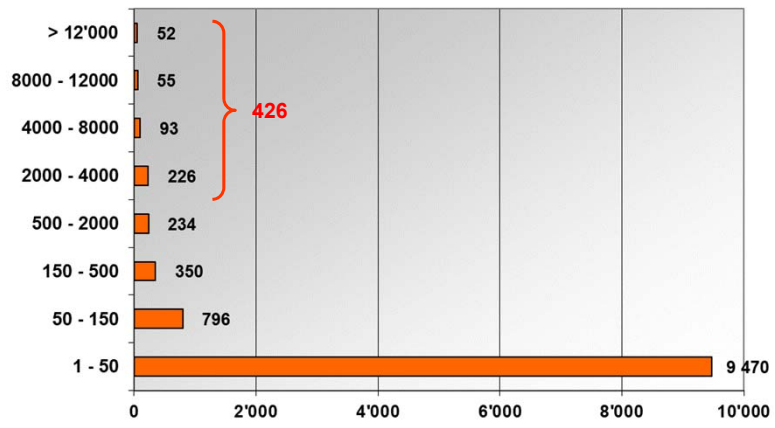
Haltungsformen Legehennen CH (2016)



40

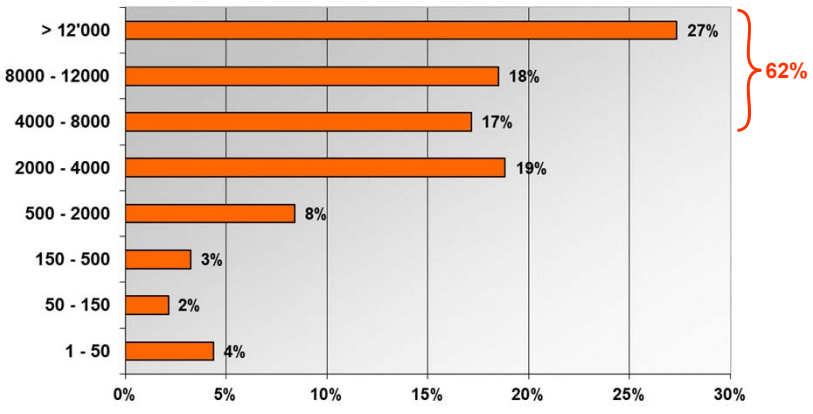
Quelle: Aviforum/BLW

CH-Legebetriebe nach Bestandesgrösse 2017



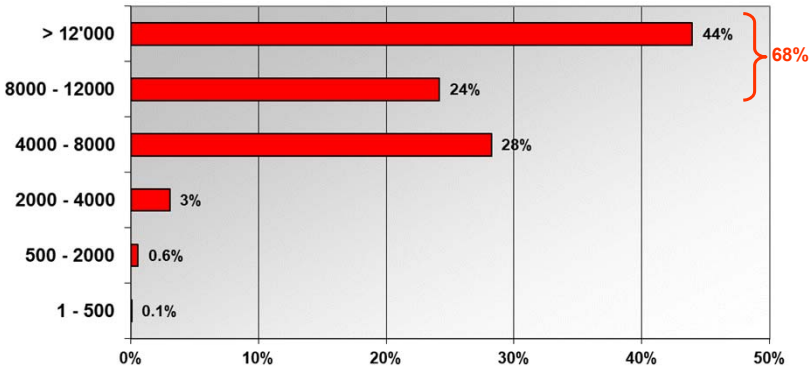
Quelle: BfS

CH: Legehennen nach Bestandesgrössen 2017



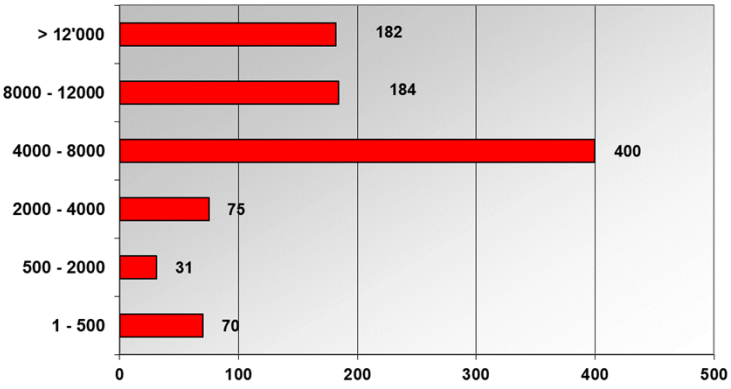
Quelle: BfS

CH-Mastpoulets nach Bestandesgrösse 2017



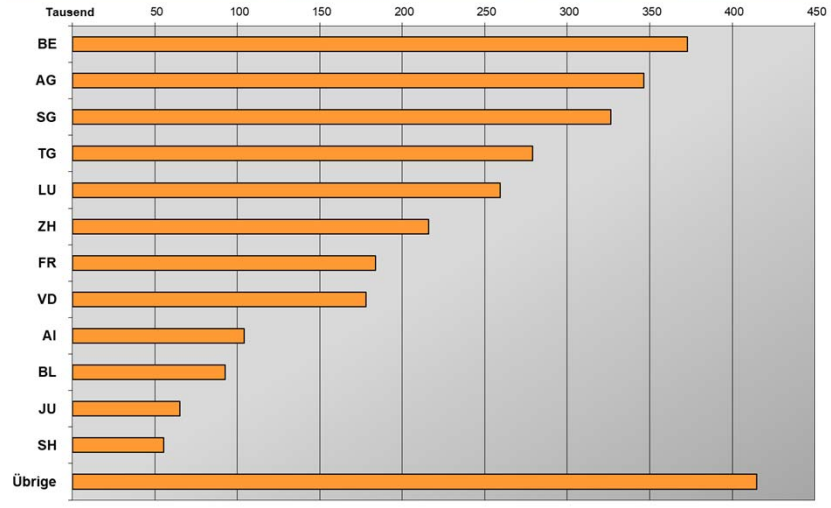
Quelle: BfS

CH-Pouletmastbetriebe nach Bestandesgrösse 2017



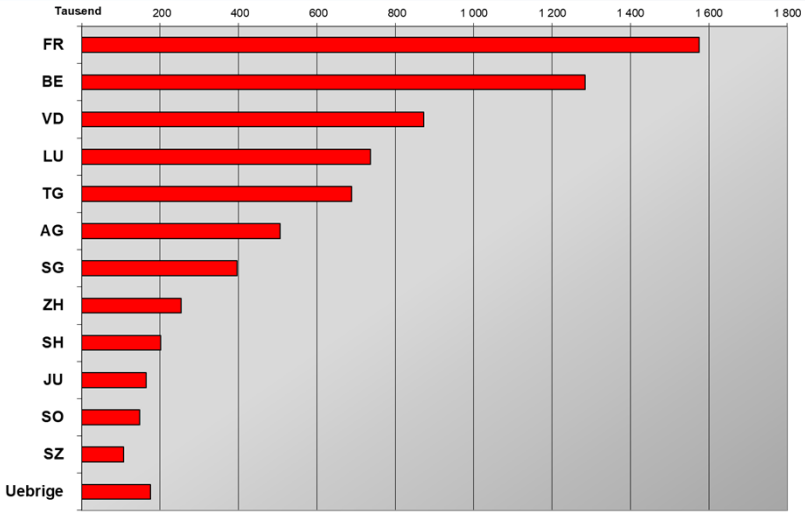
Quelle: BfS

Legehennenbestand nach Kantonen 2017



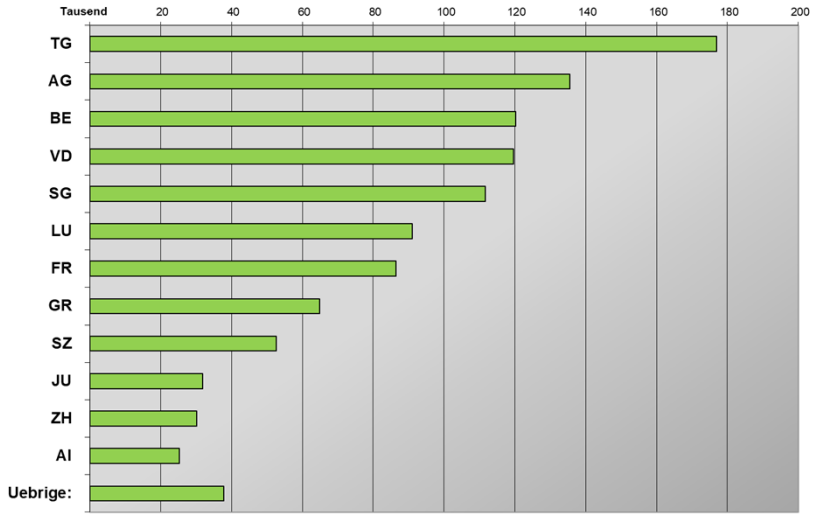
Quelle: BfS

Pouletbestand nach Kantonen 2017



Quelle: BfS

Junghennenbestand nach Kantonen 2017



Quelle: BfS