2010

ANNUAL REPORT

avec

Association of Poultry Processors and Poultry Trade in the EU Countries - ASBL
Association de l'Aviculture, de l'Industrie et du Commerce de Volailles dans les Pays de l'Union Européenne - ASBL

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avec *wants to thank BPC, CIDEF, ZDG, Rose Poultry, Moy Park, Dansk Landbrug for their contribution to the annual report 2010.*

INTRODUCTION BY THE PRESIDENT AND THE SECRETARY GENERAL

The UN climate change summit in Copenhagen, December 2009 was put into perspective coming so soon after violent earthquakes, floods and volcanic activity around the world. The repercussions of the global financial turbulence are still felt. How can European poultry processors weather the storm and meet the challenges of the next decade?

Key challenges for European poultry processors are producing economic, sustainable, innovative, bio-diversity friendly products, appealing to consumers while respecting the world's strictest demands in terms of food safety, animal health and welfare and dealing with the highest production costs.

Consumers' health has never been better and we live longer than before because our living conditions and foods are better than ever. Consumer choices change and it is the poultry industry's challenge to meet the ever changing needs of consumers.

In 2010 the new marketing standards for poultrymeat entered into force. The standards introduce "fresh" preparations as poultrymeat that has not been previously frozen. **avec** thinks that this complies with consumers' perception of fresh. **avec** also believes that the high overall European standards should be rewarded by an "EU farming" label - easily recognisable by all consumers and guaranteeing high quality, safe products respecting animal welfare.

Salmonella targets coming into force must be reasonable. The criteria must be set according to the risk posed by infections. The European Food Safety Authority (EFSA) report of 2007 clearly states that *Salmonella Enteritidis* and *Salmonella Typhimurium* are responsible for most cases of Salmonella related food poisoning in humans. **avec** firmly believes that targets should be set according to these findings.

High European standards and production costs make it difficult to compete on a level playing field in global trade. **avec** continues to demand that poultrymeat or poultry products imported in the EU must be produced under EU equivalent standards. The survival of the EU poultry industry is at stake.

In 2009-2010 the number of outbreaks of AI was limited. In 2009 -2010 so far H5N1 has been recorded in Bulgaria and Romania, H7N7 in Spain and outbreaks of LPAI in ducks Denmark and in poultry in the Netherlands. So far no cases of Newcastle disease have been reported.

avec's Brussels office stays in close cooperation with the European institutions and **avec** is actively involved in discussion with other stakeholders on legislative proposals. With stakeholders including COPA-COGECA, EFPRA, EFFAB, CLITRAVI, UECBV, FVE, COCERAL, FEDIOL and FEFAC, **avec** co-signs position papers to the Commission and Parliament. With the entering into force of the Lisbon treaty on December 1st, 2009 this close cooperation has become even more important.

On a global scale **avec** continues to contribute and participate in the work of the International Poultry Council, meeting twice a year. IPC represents the poultry interests on a global basis. IPC is recognised by a number of official organisations and is actively participating in OIE, Codex Alimentarius and FAO.

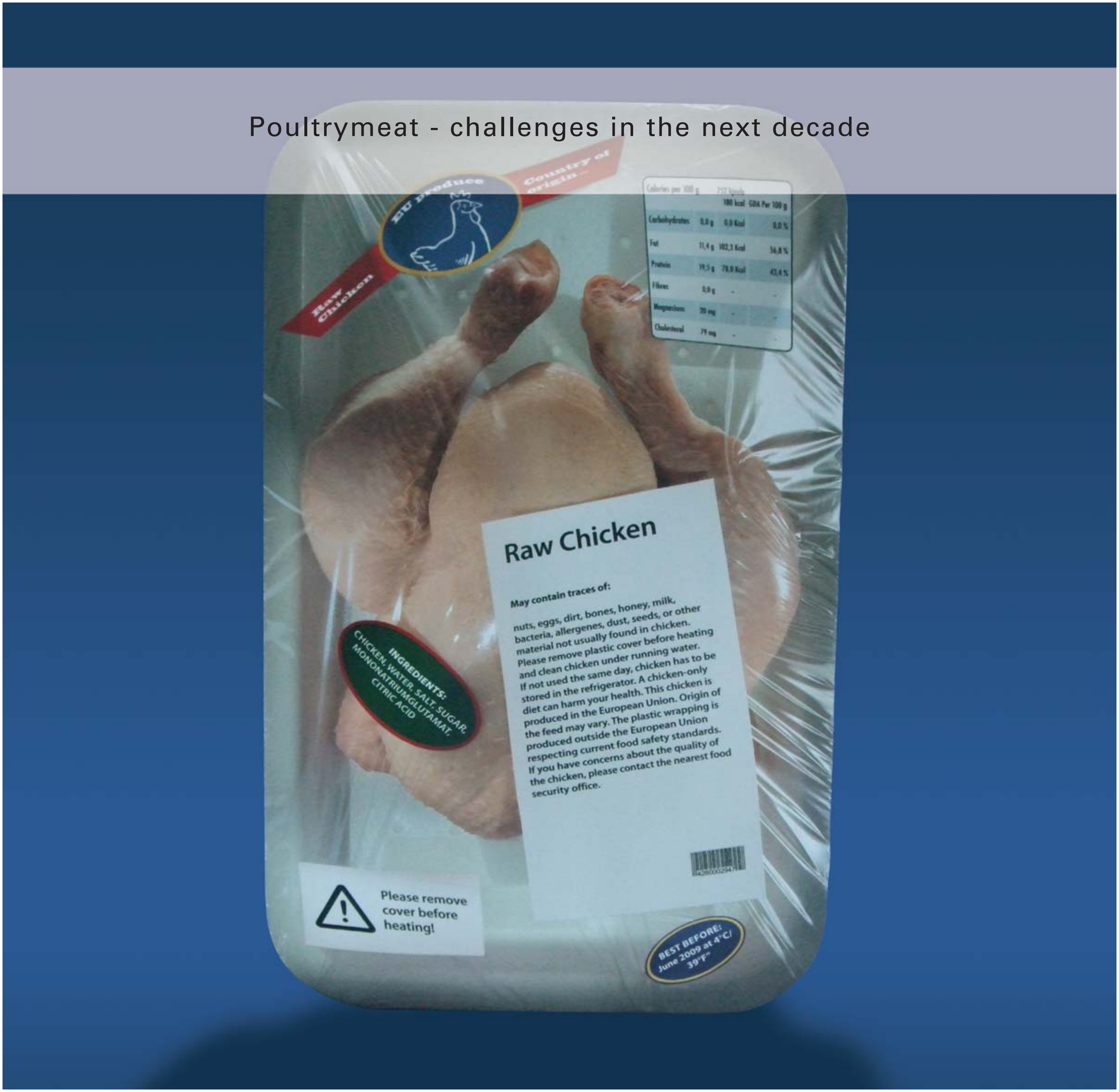
avec does its utmost to make sure that the cooperation and representation at the European policy level is managed to the benefit of its members and the European consumers

Aldo Muraro
President

Tage Lysgaard
Secretary General

PAGE

Poultrymeat - challenges in the next decade



AVEC – OUR ASSOCIATION

Who are we?

avec is a voluntary, non-profit association created in 1966. As a European unit **avec** represents and promotes the interests of the European poultry sector. Our members are national organisations representing poultry processors and the poultry trade in 16 EU countries. **avec** members represent 95% of the EU poultrymeat production.

avec influences the drafting of EU legislation, which has consequences for the industry and for EU consumers and strives to improve the established, strong cooperation with the different services of the European Commission and the Parliament. On December 1st 2009 the Lisbon treaty entered into force. With the Lisbon treaty the European Parliament has gained more influence (co-decision procedure) on a number of legislative proposals of interest to the poultry industry and avec keeps good relations with the changing MEPs, a cooperation of key importance.

Objectives

The main objectives of **avec** are to promote and defend the interests of the members, to find solutions to common issues, and to create a level playing field with common international rules and standards. The aim is to represent a strong and united European poultry industry by cooperating and keeping close contact to our member organisations and by maintaining and developing strong relations with the European Union, international organisations and partners.

By promoting the interests of the European poultrymeat sector as an umbrella organisation, we represent a strong and dynamic entity prepared to handle the present and future challenges of our industry.

Administrative structure

In January 2005 **avec**'s secretariat was established in Brussels. The office is managed by Cees Vermeeren, Director, and added a policy adviser to the staff in 2007. Tage Lysgaard is Secretary General of **avec**. From 1973 to 2005 the Secretary General managed the secretariat based then in Copenhagen.

On a daily basis the secretariat of **avec** gathers and distributes information and analysis on current issues to the member organisations and communicates with the European institutions and other partners. **avec** is also intermediary and adviser to its member organisations.

The Presidency and the Board

Aldo Muraro, president of the Italian poultry association UNA, was elected president of **avec** in 2008. The president leads board meetings and the General Assembly and he assists the secretariat in its daily work whenever possible.

avec has three vice-presidents, Jan Odink from NEPLUVI in the Netherlands, Federico Felix from Propollo, Spain and Paul Heinz Wesjohann of the German BVG. The presidency and vice-presidency are for election every two years and are renewable.

avec member organisations are represented in the Board by one Board Member and one deputy Board Member. Board meetings are held four times a year. **avec** organises an annual reception in connection with the first board meeting to facilitate an exchange of views between board members and officials from the Commission, the Parliament and other stakeholders. Commission experts are invited to attend the board and working group meetings whenever their presence is considered necessary. The General Assembly takes place on a yearly basis, usually in September or October, and up to 200 delegates participate. Speakers from the industry, the EU institutions, and from other international organisations are invited to give their views on key issues relevant to the poultry sector.

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avec represents and promotes the interests of the European poultry sector.

WHO ARE OUR MEMBERS?

avec represents the majority of poultry interests in the European Union. Our members are national organisations representing poultry companies, processors and slaughterhouses. Currently, we have 18 members from 16 of the EU Member States, representing approximately 90% of the European poultrymeat production.

The members participate in the daily work of **avec**. They help to find compromises between different national interests, to formulate common positions, and to bring these positions forward to the relevant decision makers through national contacts.

OUR MEMBERS ARE:

BELGIUM
V.I.P. – België – Vereniging van Industriële Pluimveeslachterijen van België

CZECH REPUBLIC
Sdruženi Drubezarskych Podniku

DENMARK
DSF – Dansk Slagtefjerkræ

FINLAND
Suomen Broileriteollisuusyhdistys

FRANCE
FIA – Fédération des Industries Avicoles
CIDEF – Comité Interprofessionnel de la Dinde

GERMANY
Bundesverband der Geflügelschlachtereien e.V.

HUNGARY
Baromfi Termék Tanács

ITALY
UNA – Unione Nazionale dell'Avicoltura

NETHERLANDS
NEPLUVI – Vereniging van de Nederlandse Pluimveeverwerkende Industrie

POLAND
KRD - IG - Krajowa Rada Drobiarstwa - Izba Gospodarcza

PORTUGAL
ANCAVE – Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves

ROMANIA
Uniunea Crescatorilor de Pasari din Romania

SLOVENIA
GIZ Mesne Industrije Slovenije

SPAIN
AMACO – Asociación Nacional de Mataderos de Aves Conejos Y Salas de Despiece
PROPOLLO – Organización Interprofesional de la Avicultura de Carne de Pollo del Reino de España

SWEDEN
Svensk Fågel

UNITED KINGDOM
BPC – British Poultry Council

avec

Pro Pollo

NEPLUVI

UNA

SVENSK FÅGEL

VIP - BELGIE

bpc

FIA

Baromfi Termék Tanács

ETL

BVG

KRD

GIZ Mesne industrije

Uniunea Crescătorilor de Păsări din România UCPR

ancave

EU AND INTERNATIONAL KEY PARTNERS

avec cooperates with many other international organisations depending on the issues at stake. **avec** has regular contacts with other stakeholders in the agricultural food sector, in particular with the meat sector. Exchange of views with other involved stakeholders on technical and strategic issues can be very useful.

avec has valuable communication and cooperation with **COPA-COGECA**, the *Committee of Professional Agricultural Organisations* and *General Confederation of Agricultural Cooperatives in the European Union*. Together **avec** and **COPA-COGECA** have drafted some common positions and letters to the EU institutions and lately drafted a Community guide on good hygiene practice to be translated into all European Union languages and to be published in 2010/2011.

Depending on the issues, **avec** also builds alliances with **CLITRAVI**, the *Liaison Centre for the Meat Processing Industry in the European Union*, **UECBV**, the *European Livestock and Meat Trading Union*, **FEFAC**, the *European Feed Manufacturers' Federation*, **IFAH**, the *International Federation for Animal Health*, **EFPRA**, the *European Fat Processors and Renderers Association*, and **EUROCOMMERCE** *association for retail, wholesale and international trade interests.*

The **avec** office has become a "European Poultry House". From 2007 the secretariat of **AEH**, the *Association of European Hatcheries* and the secretariat of **EPEXA**, the *European Organisation for Exporters of day-old chicks and hatching eggs* have shared the secretariat of **avec**. In April 2008 the **EPB**, the European Poultry Breeders, also joined. This unique situation allows the European poultry sector to profit from the mutual sharing of knowledge on common poultry issues and strengthens our efforts to improve the global competitiveness.

AVEC, A MEMBER OF THE INTERNATIONAL POULTRY COUNCIL

On 7 October 2005, delegates from Argentine, Brazil, Canada, Chile, China, Egypt, the EU, Mexico, Thailand, Turkey and the USA founded the International Poultry Council - *IPC*. Today, the IPC gathers the leading organisations from those countries as well as from Australia, Colombia, Germany, Honduras, Italy, Kazakhstan, New Zealand, Russia, South Africa, Spain, United Kingdom and Ukraine. IPC has associate members from Denmark, Germany, Pakistan, Russia, the Netherlands and the USA.

The mission of the IPC is to strengthen communication, eliminate misunderstandings, and promote cooperation among its members, as well as to influence and promote the development of an international level playing field.

The main objectives include encouragement of the development and application of uniform and science-based international sanitary and marketing standards for poultry; promotion of technical cooperation and exchange of science-based principles between national authorities; promotion of transparency of governmental policies affecting poultry in all countries; and maintenance of a dialogue with relevant international organisations such as the OIE, Codex Alimentarius, FAO and WTO.

IPC has through the agreement with the OIE taken active part in e.g. the work concerning:

- Private Standards
- Animal health and welfare

Facts about the IPC :

- Founded on 7 October 2005
- Official seat: 184, Rue de Vaugirard, 75015 Paris, France
- President: Mr. James H. Sumner, USAPEEC
- 1. Vice-president: Mr. Tage Lysgaard, **avec**,
- 2. Vice-president: Mr. Ricardo Santin, ABEF, Brazil
- Treasurer: Mr. Cesar de Anda, UNA, Mexico
- Members-at-large: Dr. Mohamed El-Sharfei, EPPA, Egypt
Mr. Wang Xiu Lin, CFNA, China
- Represents more than 80% of world broiler production and about 95% of world poultry trade.

IPC Conferences from 2008:

- *Madrid*, Spain, 2008
- *Beijing*, China, 2008
- *Rome*, Italy, 2009
- *Sydney*, Australia, 2009
- *Paris*, France 2010
- *Santiago*, Chile, 2010

OIE – IPC agreement in May 2008 and FAO MoU April 2010

During the OIE Delegates' 76th Assembly in May 2008 the Agreement between the OIE (World Organisation for Animal Health) and the IPC (the International Poultry Council) was signed by Director General of the OIE, Dr. Bernard Vallat and IPC First Vice President Tage Lysgaard.

IPC is pleased to enter into a close and constructive cooperation with OIE. IPC and OIE share many issues of common interest: provision of general information on the poultry sector on veterinary issues, cooperation and development and revision of international animal health and zoonoses standards, cooperation in the development and promotion of science-based international animal welfare standards relevant to international trade, exchange of views on the approach by intergovernmental bodies such as the WHO, FAO and their subsidiary body on disease surveillance and control strategies, food safety and exchange of views and participation in meetings on relevant aspects of animal health and zoonoses, animal welfare and food safety.

In April 2010 a memorandum of understanding was signed by FAO and IPC during the IPC spring meeting in Paris.

AVEC FOCUS

This section gives an overview of the main themes **avec** is working with in 2009-2010. You will find a more general description of the issues at stake combined with a brief outline of **avec**'s position in relation to each issue, drawing up the lines for future actions. For more information on the different subjects, we invite you to visit our web site where you can find our position papers and other information:

www.avec-poultry.eu

POULTRYMEAT - CHALLENGES IN THE NEXT DECADE

Will there be meat for all in 2050?

FAO estimates that one billion people globally are under nourished today. In 2050 relative income equality will be reduced and the global food production must grow by 70% to meet the increasing global demand for food. Competition for scarce land and water resources increases.

New land for farming very limited in many countries but some, especially Brazil, will still have hectares available for conversion to farmland. Poultrymeat production will increase most in Asia over the next 10-20 years (an estimated 70% rise) but land for feed production is scarce so the feed will have to be supplied from Brazil which gives Brazil a competitive advantage. In 2020 self-sufficiency in poultrymeat production will dominate the global scene except for Russia, African countries, Japan and the Middle East.

Will large global poultry players merge and grow? Recently we saw that large European poultry companies have become part of large Brazilian and Thai meat processing companies - a trend which is expected to continue.

Will there be meat for all when the global population in 2050 reaches nine billion people? Or must we cut our meat intake and perhaps opt for a meat free day per week as suggested in a happening organised by the European Parliament in December 2009?

Animal versus vegetable nutrients?

Proteins and micronutrients like zinc, iron, vitamin A, B_{12} play key roles for the function of human brain and nervous systems and formation of blood. They cannot easily be substituted by vegetable proteins and micronutrients. The bioavailability of animal nutrients is much better for humans than that of vegetable nutrients as these contain absorption inhibitors. Poultrymeat has the advantage compared to other meats that it has a lower proportion of saturated and a higher proportion of polyunsaturated fat. (FAO).

Which way forward?

Consumers demand safe, environmental friendly products from animals raised respecting animal welfare. Consumers' perception of sustainable food is often related to organic and free range farming methods. Scientists have yet to prove that these farming methods are environmental sustainable. If global agricultural production switches to organic and free range methods the increasing global demand for meat cannot be met. Norman Borlaug, father of the "green revolution" asserts that organic farming can at most feed 4 billion people globally.

Conventional indoor poultry rearing for meat production represent the most environmental friendly and sustainable of all the meat sectors (JRC 2008). The poultry breeders and producers have a common economic interest in the health and welfare of the poultry raised and cooperate constantly to improve breeds, farming and processing methods.

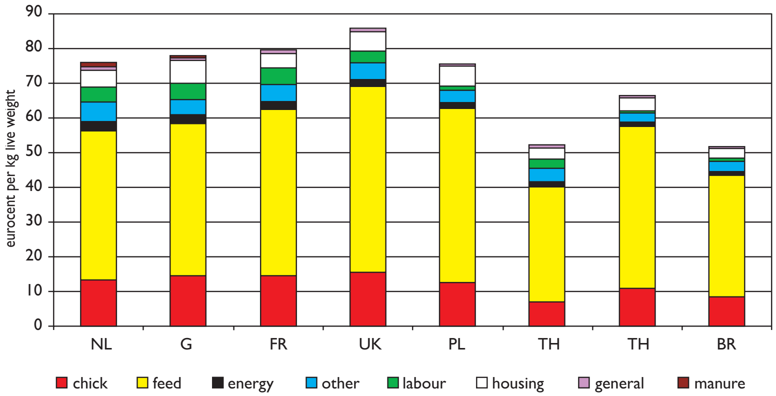
Controversy. Which is most environmental friendly? Organic or conventional?

A Norwegian study from 2008 compared 6 different cropping farming systems in terms of yields and production of metabolizable energy for human consumption, major N flows and balances as an expression of the efficiency of food production. Conventional arable farming using environmentally sound management was most productive and environmentally friendly overall. A 2008 UN Environmental Programme study concluded that organic methods greatly increase yields in Africa. Many other studies and reports have contradicting conclusions. Further scientific assessments must be carried out before final conclusions can be taken.

Competitiveness of European poultry producers - coherence with EU 2020 strategy?

Poultry production costs are key determinants of the European poultry processors' international competitiveness. For example production costs for broiler meat in 2007 in the US were 36% lower than in The Netherlands, mostly because of lower US feed prices. In Brazil the costs were more than 40% lower, due to lower feed and labour costs. Both the US and Brazil are permitted to use meat-and-bone meal in feed whereas this has been prohibited in the EU since 1994 for ruminants and was extended to non-ruminants from 2001. The EU zero GM tolerance policy further aggravates the access to protein and the competitiveness of our producers.

Figure 6.4: Production cost for broilers (euro per kg of live weight). Base year 2007.



Source: van Horne, LEI report 2009-004

The lack of competitiveness has led to pig and poultry imports have increased by 5.2% and exports have decreased with 3.7%.

If current tendencies continue many European poultry producers face tough economic challenges which will affect the sector's survival and jobs. This is in contradiction with the European Commission's 2020 strategy for smart, sustainable and inclusive growth.

FACTS ON EUROPEAN POULTRYMEAT EMPLOYMENT & PRODUCTION

- Number of enterprises (production): 31.816
- Number of staff employed: 673.088
- Turnover: 107 billions €
- Production: 11 million t

Based on **avec** 2010 estimates

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ANIMAL WELFARE AND HEALTH

Community Action Plan on the Protection and Welfare of Animals 2006-2010 and Commission Animal Health Strategy 2007-2013

The Commission's preparation of the new animal health law continues. **avec** delivered input to the public consultation on the possible approaches to a new animal health law in December 2009 and again in March 2010 on the possible administrative costs and burdens of animal health legislation. A regulatory proposal is expected end of 2010.

In fall 2009 two Commission sponsored research projects were initiated: the Welfare Quality project and the European Animal Welfare Platform (EAWP). Both projects aim at providing suggestions, best practices and a discussion forum for the European policy makers to further improve farm animal welfare and define criteria.

avec has been following these initiatives actively and was surprised to learn that the major players from the European poultry industry were only asked for information and involvement at a very late stage of the process in the EAWP project. The EAWP excludes the major poultry industry and its representative body which raises questions about the objectiveness of the whole project. **avec**, with other members of the "European poultry house" has informed the project leaders and the Commission about its reservations.

avec has noted with pleasure that its comment on the section "life of chickens" on the DG SANCO website "farmland" has been fully taken into account. The "farmland website" was established in 2009 with the aim of educating children in issues of farm animal welfare. **avec's** suggestions on the initial text on poultry have resulted in changes to improve the accuracy of the guide to the life of broiler chickens.

As part of its initiatives on animal health, the Commission held in June 2010 a two day seminar "animals + humans = one health". A "road show" initiated in 2008 is still travelling through Europe promoting animal health issues.

Minimum rules for protection of chickens kept for meat production, Directive 2007/43

The directive entered into force on June 30, 2010. The directive sets rules for maximum stocking density, feeding and drinking facilities, ventilation, heating, light, litter, noise, record keeping, training, and surgical interventions. Importantly, the directive provides for indicators of welfare on farms be monitored at the slaughterhouse, but as yet the Commission has not fixed any common EU indicators of welfare outcomes.

avec set up a working group to develop effective and practical conditions for the industry at European level, but so far it has not been possible to set up common criteria because each Member State is deciding on its own different criteria of welfare concerns. Stocking density, food pad lesions, hock burn and mortality have been mentioned as possible indicators but **avec** still believes that implementation of harmonized indicators best serve the interests of the internal market.

EFSA's draft scientific report on welfare aspects of genetic selection in broilers and housing and management of broiler breeders.

The draft report was published in March 2010. **avec** convened a meeting with **avec** members, EPB, EFFAB (European Forum of Farm Animal Breeders), COPA-COGECA and NFU (National Farmers Union) and commented on the draft report. The report was based on outdated studies and positive results from newer studies had not been taken sufficiently into account. **avec** will together with EFFAB, Copa-Cogeca and NFU continue to comment and to follow the next steps closely.

Protection of animals during transport, Regulation (EC) 1/2005

The regulation came into force in January 2007. It replaces the existing directive and covers poultry too. **avec** has advised the Commission on space, feed and water availability, maximum travel times, uploading and unloading, training of drivers and costs in connection with transport for chicken and turkey and has advocated that harmonised standards apply in all Members States. The Commission is expected to present a review of the regulation by the 2nd half of 2011. **avec** will closely follow the developments.

Avian Flu and Newcastle disease from 2009 to 2010

Early detection through monitoring of virus is crucial. The implementation of the surveillance (2007/268) and a notification system for low pathogenic avian influenza (LPAI) and highly pathogenic avian influenza (HPAI) and control plans (Council Directive 2005/94/EC), have improved the European situation since the first outbreaks.

From September 2009 to July 2010 the number of outbreaks of AI were limited. So far H5N1 has been recorded in Bulgaria and Romania, H7N7 in Spain and outbreaks of LPAI in farmed ducks in Denmark and in poultry in the Netherlands. The cases of Newcastle disease reported mainly concern pigeons.

Compartmentalisation, Commission Regulation (EC) 616/2009 implementing Directive 2005/94/EC on approval of poultry compartments

avec has with EPB and the Commission been involved in the drafting of the new regulation on compartmentalisation. Compartmentalisation is based on animal populations with the same health status, under one bio-security plan, and depends on high standards of bio-security, risk assessment and partnership between industry and veterinary authorities.

The overall aim is to stop the spread of the disease so that trade can resume as soon as possible after an outbreak. As a next step **avec** will develop a leaflet illustrated by an example showing the positive use of the regulation.

Animal cloning - included in the Proposal for a Regulation of the European Parliament and the Council on novel foods - 2008/0002 (COD)

ESFA published in July 2008 a scientific opinion on cloning. The European Parliament discussed cloning in fall 2008 and demanded a total ban of using cloned animals and their offspring for food production. The draft has been discussed again in the Parliament in May 2010 and the introduction of cloned animals and products of offspring of cloned animals in the food chain was again rejected. The Parliament has requested that the Commission instead presents a separate legislative proposal on cloning. DG SANCO has promised the Parliament a report on cloning by the end of 2010.

avec has worked with EPB and EFFAB on a joint position and are in favour of keeping the options of using cloning open, if only for research reasons, though cloning so far is not used in poultry breeding. A submission has been sent to DG SANCO. The European Commission has requested an update from EFSA on the current status of possible scientific developments in the area of cloning farmed animals for food production purposes. This work follows on from the statement that EFSA provided in July 2009 and the Scientific Committee opinion of 2008.

EFSA is asked to consider existing data about the health and welfare of clones during their production life and natural life span. Therefore EFSA has published a call for data seeking scientific contributions from third parties. Specifically, EFSA is seeking information which has become available since June 2009. Such preferably peer reviewed data could refer to new scientific publications, as well as to scientific information which is not yet published.

FOOD AND FEED SAFETY

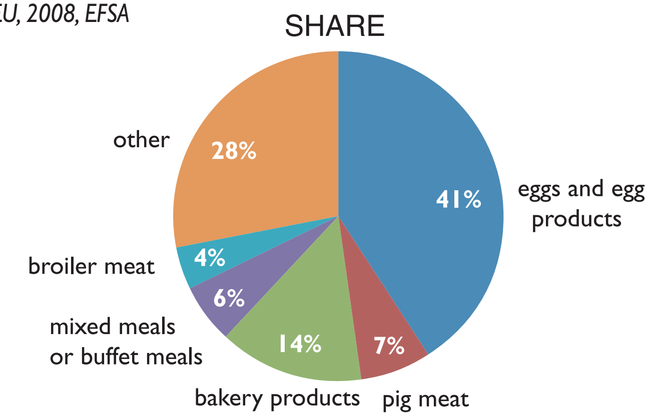
Consumers' health has never been better and we live longer than before because our living conditions and foods are better and more wholesome than ever. European regulations on the food chain cover responsibility, food hygiene measures, microbiology, labeling of food and marketing standards. European poultry industry complies with strict measures to ensure safe poultry meat to consumers.

Regulation 2160/2003 on the reduction of Salmonella in poultrymeat
The regulation requires 'absence of Salmonella in 25 g poultrymeat' from December 2010.

avec has been cooperating with DG SANCO on socio-economic impact assessments of the entering into force of the criteria. **avec** maintains its opinion that the criteria is discriminating and damaging the image of the industry that is already complying with tough measures for microbiological controls. EFSA's Summary Report on Food-borne Outbreaks in the European Union in 2007, furthermore shows the number of verified outbreaks caused by chicken meat decreased in the period 2005-2007. Further improvements have been reached since then.

In June 2010 the Commission published a draft stating that the criteria will be limited to the two serotypes *Salmonella enteritidis* and *Salmonella typhimurium* that are the major sources of disease in humans. **avec** is pleased to note that its comments and analysis have been taken into account.

Distribution of implicated foodstuffs in verified outbreaks caused by Salmonella in the EU, 2008, EFSA



EFSA baseline survey on the prevalence of campylobacter in broiler batches and of campylobacter and salmonella on broiler carcasses in the EU.
The survey from EFSA published March 2010 states that campylobacteriosis is the most frequently reported zoonosis in the EU and is often related to the consumption of broiler meat. The survey's aim is to formulate future recommendations and methods for the reduction of the prevalence.

In May 2010, **avec** collected information from members on the intervention measures applied both at farm and slaughterhouse level and has replied to EFSA that the situation differs across the EU 27. The options suggested by EFSA may raise discussion on the definitions and legislation applicable as most poultrymeat in the EU is sold as fresh meat. **avec** will develop a position paper with an expert group and stay in close contact with EFSA on the outcome of the survey and future measures.

AMR - antimicrobial resistance - SANCO/6876/2009r
The Commission held from January to March 2010 a public consultation on a working paper on ongoing EU activities related to AMR risk monitoring, assessment and management.

avec has together with EPB replied to this consultation. **avec's** main concerns to suggested measures are in terms of monitoring that Member States have different systems, medicines and education in place that must be harmonized before EU data can be usefully assessed. Risk assessment should be EU centralized and based on scientific data. It is relevant to consider also human influence on both human and animal health. Risk management must be carried out locally because it depends on the actual situation. Finally, the welfare and health of animals must not be compromised in the discussions. **avec** will follow next steps closely.

Antimicrobial treatment (AMT) - consumer confidence
In January 2010 a public consultation opened on the revision of the joint AFC (Panel on additives, flavourings, processing aids and materials in contact with food)/BIOHAZ (Biological hazards) guidance document on the submission of data for the evaluation of the safety and efficacy of substances for the removal of microbial surface contamination of foods of animal origin intended for human consumption. **avec** requested its members to reply directly to BIOHAZ.

In September 2009 the US notified WTO that the US will request establishment of a dispute settlement panel regarding the EU's restriction on imports of U.S. poultry treated with pathogen reducing treatments (PRTs) such as chlorine. **avec** will be following the next steps closely.

Revision of the hygiene package - Regulations 852/2004 - 853/2004 - 854/2004 and of 178/2002 regarding article 18 on the traceability of food of animal origin.

The "Hygiene" regulations lay down rules for the food chain "from stable to table" that is "food safety throughout the food chain starting with the primary production. The regulations deal with issues of common hygiene requirements, the registration or approval of food establishments and the possibility of developing guides to good practice at all levels of the food chain and the official controls.

The evaluation is still ongoing and **avec** has expressed its position to DG SANCO on responsibility, traceability of unpacked food, origin labeling, the definition of MSM and "fresh". In 2009 **avec** commented on the discussion on temperatures and terminology used for "foie gras/specific products".

Community Guide on Good Hygiene Practice for chickens

avec has in co-operation with COPA-COGECA drafted a Community Guide on good practice for meat chickens covering recommended hygiene measures from the farm to the slaughterhouse.

The guide includes the stages of farming, catching, loading and transport and was approved by the Member States and DG SANCO in a SCFCAH meeting in March 2010. The Commission will take care of translations into all community languages. The guide will be made available from **avec's** website and distributed in Member States when ready.

Regulation 1069/2009 laying down health rules as regards animal by-products and amending Regulation 1774/2002

In general very few changes are foreseen with the new regulation. **avec** recommends that the discussion on hatchery waste continues in the light of the results of a Dutch study with a possible reclassification of hatchery by-products. The Commission expects implementing rules to be ready by 2011. **avec** will continue to lobby for the reclassification of hatchery by-products.

Reintroduction of Processed Animal Proteins (PAPs)

avec together with COPA-COGECA, Clitravi, EFPRA, FEFAC and UECBV, has written a joint letter recommending the reintroduction of PAPs. Both the Commission and the Parliament have been contacted.

The work on the principles continues. Dedicated by-product processing operations are essential together with compliance with the ban on intra-species recycling. Dedication should be combined with the acceptance of a tolerance for intra-species use of PAPs in poultry and pig feed. **avec** believes that the reintroduction of the PAPs will give the industry a valuable and much needed feed protein and will continue to support this reintroduction.

In June 2010 a draft from DG SANCO suggesting the introduction of a tolerance level for a very small amount of PAPs for non ruminants has gone into Commission inter-service.

EU GM tolerance?

Poultry in the EU are highly dependant on imported soya beans. Most soya beans come from Brazil and the US and most soya beans available now are GM soya, not yet approved in the EU. Last summer two cargoes found cross-contaminated by traces of non EU approved GMs (MON88017 and MIR604) destined for European markets were rescued at the last minute from being returned.

avec, along with other stakeholders, keeps the Commission informed about the difficulties and long term problems caused by these policies and have delivered input on the situation to a consultancy company that carried out an impact assessment for the Commission. The global demand for feed is increasing and prices are prospected to increase as well. The survival of European feed and food producers and European food production is at stake.

SANCO Commissioner John Dalli, in June 2010, suggested a two step approach. The Commission will be given greater freedom to approve new varieties for cultivation and the MS government will then decide whether it wants to permit the cultivation on its territory. The proposal was adopted on July 13, 2010.

Zero EU GM tolerance

In Brazil and the US and Argentina, the EU's main suppliers of soya beans, on average 90% of the production is GM. This makes the presence of GM residues in imported feed material technically unavoidable and the EU feed supply extremely fragile.

Currently 150 GM crops are approved globally of which only 2 varieties are approved for cultivation in the EU.

MARKETING STANDARDS – LABELING OF POULTRYMEAT

Council Regulation 1047/2009 amending Regulation (EC) 1234/2007 on marketing standards for poultry meat, October 2009 entered into force May 1st, 2010. **avec** has actively promoted the definition "fresh" and is pleased to note that its comments have been accepted. The definition of "fresh" is poultrymeat that has not been previously frozen. The definition covering poultrymeat has been extended to include poultrymeat preparations.

Currently the implementing measures Regulation 543/2008, especially the definition and interpretation of "preparations" and "products" is under discussion with the Commission. **avec** understands a "preparation" as a meat which has undergone preparation "insufficient to modify the internal muscle fibre structure of the meat". An expected report on the interpretation has still to be published. **avec** remains in close contact with DG AGRI and DG SANCO on the implementing measures and definitions.

Mandatory labeling of food information to consumers

In January 2008 the Commission adopted a proposal for a revision on existing legislation on food and nutrition labeling. The proposal COM (2008) 40 final concerns labeling information to consumers.

avec convened in 2008 a working group that discussed the proposal and agreed a common position. The Commission proposal has been debated in detail in three committees of the Parliament (AGRI, ENVI and IMCO). Weighty discussions have taken place on what and how to label, especially origin, portion size and nutritional content. In March and June 2010 Parliamentary compromises were reached on compulsory origin labeling for meat and on the rejection of a proposed colour code ("traffic light") system. The Parliament has requested the Commission to carry out an impact assessment of the suggested compulsory origin labelling. The final decision on "origin" is expected to influence the discussions on origin in the agricultural product quality advisory group.

Green Paper: Agricultural Product Quality

The discussion on the DG AGRI initiative from 2008 continues in an advisory working group. The aim is to help European farmers promote the high quality agricultural production, especially PDOs and PGIs (protected origin certification schemes). A study from 2010 shows that the total value of the production is 14.2 billion € in 2007. Some 82% of the products are sold in the country of origin and, against expectations, only 5% are exported to third countries. The Commission expects to make a legislative proposal by the end of 2010 and an impact assessment will take place in June 2010. The Commission promotes the PDOs and PGIs in Free Trade Agreements admitting that the complexity of the many EU schemes causes difficulties in the negotiations.

avec is participating and has stated that it favours an "EU farming" label signifying already high EU quality standards, and that too many different but similar quality labels confuse consumers.

Labeling of animal welfare

At present many different schemes and possibilities exist within the different Member States. **avec** is convinced there is a strong need for a comprehensive, consistent, coordinated and objective approach and policy to make sure consumers are informed and not misled. This must be accompanied by a simplified legal framework that reduces the administrative costs and burdens of the European food producers. This position was communicated to the consortium in charge of the feasibility study. The consortium report recommended in October 2009 that a label similar to that of organic production would be an option.

avec suggests and prefers an "EU farming label" that communicates the existence of the EU internal market, and at the same time assures consumers that equivalent legal standards are applied across the EU and that the label indicates that Member States are enforcing these standards.

The Commission will evaluate the action plan and is expected to issue a report in December 2010 including a discussion on the animal welfare label. The Commission has re-initiated discussions to have animal welfare accepted at the WTO as a trade measure - but so far without results. In international trade negotiations only Canada and Chile accept the inclusion of animal welfare standards. **avec** will be following the next steps closely.

A European origin and quality label - "farmed in the EU"
avec's combined position on food and feed safety, animal welfare and origin, was sent in March 2010 to the new Commissioners for Trade, Environment, Enterprise, Internal Market and Services, Health and Consumer Policy, and Agriculture and Rural Development. It was also sent to the chairs of the AGRI and ENVI committees of the European Parliament. The position highlighted **avec's** concerns on the various legislative proposals and the possible effects on the industry. **avec** suggests that the overall high EU quality should be communicated by a compulsory "farmed in the EU" quality label.

European Food SCP Round Table
avec joined in December 2009 the SCP Round table on Sustainable Development. The joint CELCAA, CIAA, COPA-COGECA, EFMA, EUROCOOP, EUROPEN, FEFAC, IFAH EUROPE, and PRO EUROPE initiative was set up to help consumers and other stakeholders make informed choices by providing them with exact information on relevant product characteristics including environmental performance. Data provided must be based on scientifically reliable assessment methodologies applied equally along the food and drink chain.

Four working groups have been engaged on the different initiatives since 2009. A plenary discussion took place in July 2010. By the end of 2010 a comprehensive report should be available and by the end of 2011 scientifically assessments methods should be presented.

The Lisbon treaty entered into force December 1st 2009- some major effects:

- more qualified majority voting in the Council of Ministers
- the European Parliament will be on equal footing with the Council for most legislative proposals including trade, agriculture, budgets through extended co-decision (e.g. the Parliament must approve the FTA with Korea before it can enter into force)
- the election of a President of the EU Council and a High Representative (HR) of the EU for Foreign Affairs and Security Policy to present a united EU policy position. HR's role in trade negotiations is unclear

More information:

http://www.rabobank.com/content/images/Rabobank%20A%20dynamic%20meat%20 markets%20towards%202020_April2010_VIV_Europe_2010_tcm43-107784.pdf
http://www.efsa.europa.eu/EFSA/efsa_locale-1178620753812_1211902269834.htm
EFSA's Summary Report on Food-borne Outbreaks in the European Union
http://www.efsa.europa.eu/en/scdocs/scdoc/1503.htm
http://www.fefac.org/file.pdf?FileID=15695
http://eur-lex.europa.eu/JOHtml.do?uri=OJ:L:2009:290:SOM:EN:HTML
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=197093
http://ec.europa.eu/agriculture/quality/policy/communication_en.htm
http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/agricult/108682.pdf
http://agrilife.jrc.ec.europa.eu/pipeline.htm
http:/www.euractiv.com
http://www.food-scp.eu/

The European Turkey market situation

The turkey market situation continues to be challenging for the EU producers. The production continues to decline in line with the demand for turkey meat.

Feed prices were reasonable in 2009 compared to 2008.

2010 started out with difficulties for the turkey sector. The competition with other white meats like chicken and pork meat continue and is especially felt when marketing campaigns for chicken and pork meat persuade customers to buy poultry or pork instead of turkey meat. The situation is further aggravated by the fact that consumers' buying habits favour lowest prices.

With the financial crisis the consumer habits have changed. In 2009 more consumers dined at home instead of in restaurants and for a while sales increased. It seems however, that this tendency has changed again and in the second half of 2009 the demand for prepared products increased. The turkey industry closely monitors consumer trends and tries to adjust rapidly to meet the demands.

Turkey imports continue and much of the imported meat is used in meat preparations or meat products sold at cheap prices. This tendency is damaging to the EU turkey industry. A greater emphasis on the information on the origin of the meat is needed to make sure consumers are aware of the origin of the turkey meat.

May 1st 2010 the new Regulation on Marketing Standards entered into force. With the new regulation "fresh" meat is defined as meat that has not previously been frozen and the definition also applies for meat preparations. The turkey sector believes that these new rules may benefit the EU production.

Furthermore the criteria of Regulation 2160/2003 on the reduction of Salmonella in poultrymeat enters into force in 2011 and requires Salmonella to be absent in 25 g. Some Member States have a high prevalence of Salmonella others have worked on the criteria for some years. The criterion is disproportionate for meat that will be cooked before use. Many Member States have already successfully reduced the prevalence.

Finally it is desirable that consumers receive more information and training on "basic rules of hygiene" when cooking.

TRADE NEGOTIATIONS 2009-2010

The European poultry industry favours trade on level playing field terms. Our industry complies with strict measures to ensure consumer health, animal welfare and environmental concerns. High and expensive European standards must be promoted and acknowledged in discussions with DG Trade, OIE, WTO and Codex.

THE WTO

WTO – DOHA at a standstill

Since the negotiations broke down in Geneva, July 2008 no new results have been obtained despite many initiatives especially from the European negotiators. The new US administration has not been keen to take up negotiations unless Brazil and India make commitments to the July 2008 paper.

WTO dispute settlements - USA

In September 2009 the US notified WTO that the US will request establishment of a dispute settlement panel regarding the EU's restriction on imports of U.S. poultry treated with **PRTs** – pathogen reduction treatments (chlorine). **avec** will follow the panel case closely.

In 2008 USA introduced **COOL** – mandatory country of origin labeling. Canada and Mexico have asked the WTO in April 2010 to investigate whether the US labeling requirements are in violation with international trade laws. The outcome may be relevant to the EU if it will be decided to introduce mandatory labeling of origin.

REGIONAL AND BILATERAL TRADE REGIONS AND NEGOTIATIONS

The regional approach of the Commission has not always been successful. The regions may be characterized by disparities in economic development and have a low level of economic integration. For this reason more emphasis has been put on bilateral negotiations and in 2009 an important free trade agreement has been concluded with Korea. The newly signed agreement must be approved by the European Parliament (Lisbon treaty).

The end of a 15-year dispute over EU banana imports, December 2009, have put negotiations with Central American and the Andean back on track.

ANDEAN, LATIN AMERICA AND MERCOSUR

The Andean Community (Bolivia, Peru, Colombia, Ecuador and Paraguay)

Peru and Colombia

Negotiations with **Peru and Colombia** have led to a multiparty agreement concluded in February 2010. **avec** has contacted DG Trade and stated its concern over the agreement with Peru that includes a quota for export of poultrymeat to the EU of 7.500 t/y + 10% every year without any reference to the application of EU standards.

The Central American Community (Costa Rica, Guatemala, Honduras, El Salvador, Nicaragua, from 2009 also Panama)

The EU and Central America have finalised the negotiations in May 2010. The agreement will result in an ambitious, comprehensive and balanced trade pillar of the Association Agreement. **avec** has been in contact with DG Trade. DG Trade has assured **avec** that liberalisation of trade in poultrymeat is not part of the agreement.

Mercosur

Negotiations were suspended in 2004 but Argentina and Brazil have been pushing for new talks. During the Spanish EU presidency talks were re-launched by Trade Commissioner De Gucht in Madrid in May 2010. Concessions are needed on both sides and the EU needs to reconsider its offensive and defensive (agriculture especially) interests. The EU farm ministers discussed the talks in the May Council meeting and 14 ministers reacted negatively stating that agricultural goods are "always the adjustable variable in trade talks". The Commission however, has a mandate for re-opening of the talks. New rounds are expected in fall. Member States will be consulted before. It is evident that since 2004 the situation has changed dramatically which justifies a revision of the latest offers from 2004 when the EU offered a quota at reduced duty of 75.000 tons poultrymeat and Mercosur demanded a quota of 250.000 t and full liberalisation of trade of processed products.

ASEAN AND ASEM and bilateral talks

The regional approach promoted by the Commission has been abandoned. The Commission aims at initiating new bilateral FTA negotiations with Vietnam, Malaysia and the Philippines in 2010 and continue with ongoing activities in the regions.

Korea

The free trade agreement with Korea was signed in October 2009. After examination by the EU legal services and the Parliament's consent it may enter into force end of 2010. It is the most comprehensive FTA negotiated by the EU. Korea is currently EU's 8th biggest trading partner outside the EU and the EU is Korea's second largest export market.

Singapore

With the aim of assessing the advantages of a free trade agreement DG Trade opened in January 2010 a consultation on trade with Singapore. **avec** replied to multiple questions on sanitary and phytosanitary, tariffs and non-tariff barriers to trade. Furthermore **avec** presented an overview of the total exports to Singapore by country and tariff lines. **avec** has offensive interests in Singapore.

The first round of negotiation took place in April 2010 and tariff offers were exchanged in May. Singapore is applying strict Rules of Origin which do not sufficiently respect the EU internal market situation.

India

The negotiations with India are slowly progressing and may come to an agreement by the end of 2010. However, discussions continue on SPS, sustainable development, duties, IPR and investments.

The demand in India for poultrymeat is expected to grow rapidly with increase in population and relative incomes. 95% of the market is still for live birds but this may change before 2020.

Thailand

Thailand keeps pressing the EU for lifting the ban on imports of salted products. The imports were closed after bird flu outbreaks in Thailand in 2004. Today only cooked products are imported to the EU from Thailand. Negotiations with Thailand have been paused in 2010 because of the political instability.

Thailand was close to using its quota in 2009 exporting 160 033 t of cooked meat to the EU with a 8% duty. The EU is Thailand's largest export market accounting for 40% of total exports.

China

In 2007 China produced approx 13 million t of poultry being the world's second largest poultry producing country. Since 2007 China duly reports epidemics to the OIE. Integrated management systems from farm to export have been put in place for export companies including prevention and bio-security systems supervised by official veterinarians. Tracing and recall systems have also been improved. Finally poultry exporting companies must be registered and batches for export are inspected and tested by ISO certified laboratories. (WTO).

According to the FVO recent inspection on live animals and animal products Chinese poultry are still fed feed containing additives like bacitracin, flavomycin and virginiamycin which are no longer allowed in the EU.

China's export to the EU of cooked products resumed in December 2008 after a 6 year ban due to lack of Chinese residue pesticide management.

In February 2010 China introduced antidumping duties on US chicken parts (43-105% on feet and wing tips). The US market has been closed for imports of Chinese products since 2007.

avec has investigated possible dumping of cooked duck meat in the EU produced in China and discovered that duck producers got public financial support in 2009 which seems to have been changed into support for pig farmers in 2010.

OTHER BILATERAL NEGOTIATIONS

Russia, Belarus and Kazakhstan

The 3 countries decided in January 2009 to create a single economic space by January 2012. This was notified to the WTO in June 2009. However on May 31, 2010, Russia and Kazakhstan decided to go alone for this union to take effect July 1st 2010.

Russia

Negotiations on a new comprehensive EU-Russia agreement took place in December 2009. This content has been compromised by the postponed WTO accession due to the custom union mentioned above. New meetings took place in March and May 2010. In May 2010 Russia suddenly signaled renewed interest in WTO accession but was not prepared to roll back the effects of the custom union.

In 2009 Russia announced a ban on the use of frozen poultry in the production of certain food. From 2011 the ban will be extended to imports of frozen poultry for all food production, in 2010 it concerns imports for preparation of food for children and pregnant and nursing women. This is expected to harm the exports of the 180.000 tonnes of European poultrymeat to Russia – though it is not clear to what extent, it is expected to be substantial. **avec** stays in close contact with the Commission on the issue.

Russia has decreased its import quota for EU poultry for 2009 to 185.800 tons.

Ukraine

Ukraine acceded WTO in 2008. In summer 2009 Ukraine announced new inspection requirements for imports of animals and animal products to enter into force in 2010. The Commission held talks with Ukraine and in January 2010 Ukraine cancelled the measures. The Ukrainian authorities are expected to carry out more transparent missions to EU Member States (to be published on the web site of the State Veterinary Services).

Early 2010 Ukraine announced labeling requirements for GMO free products. The Commission is in contact with the Ukrainian authorities on this new TBT. Furthermore negotiations on SPS and tariffs continue and the Commission hopes to be able to conclude negotiations by 2011.

Ukraine has great agricultural potential and like Russia Ukraine promotes self sufficiency.

Consumption of poultrymeat increased from 9 kilos per capita in 2005 to 18 kilos in 2009.

Israel

Israel has 7 approved cutting plants and slaughterhouses and 10 approved establishments exporting fresh poultrymeat, poultrymeat preparations and heat treated poultrymeat to the European Union which according to a 2009 FVO report totals 2 243 t. in 2007-2008.

The FVO report also states that Israel like the US uses antimicrobial treatment on poultrymeat. For this reason **avec** has sent a letter to the Commission with a request to react to Israel on this.

More information:

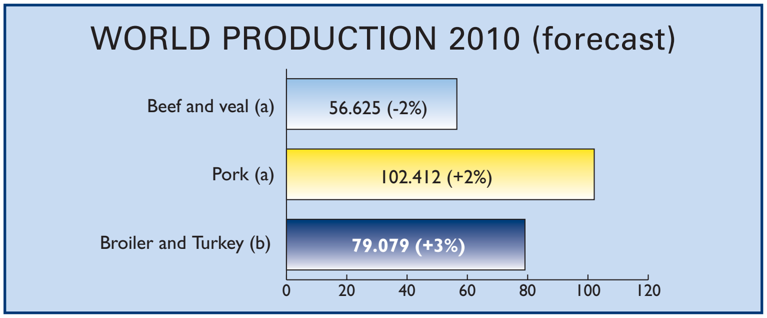
- http://www.agra-net.com
- http://www.fas.usda.gov/gainfiles/200903/146327402.doc
- http://www.meatpoultry.com/NewsLetters/MPDailyLeft/Articles/051310/WTO%20dispute%20panel%20reviewing%20COOL%20law.aspx
- http://docsonline.wto.org/gen_searchResult.asp?searchmode=simple&collections=&restriction_type=&synopsis=&subjects=&organizations=&products=&articles=&bodies=&types=&drsday=&dreday=&meet_date=&dpsday=&dpeday=&mh=&c2=@meta_Symbol&c3=@meta_Title&c4=@Doc_Date&o4=%3E%3D&c5=@Doc_Date&o5=%3C%3D&c6=@meta_Serial_Num&c8=@Derestriction_Date&c9=@Derestriction_Date&q0=&q4=&q5=&q8=&q9=&q2=&q3=China%27s+safety+administrative+system+for+export+poultry&q6=&countries=&q1=&ddsday=&ddeday=&multiparts=on&scndformat=off&ct=DDFEnglish%2CDDFFrench%2CDDFSpanish&search=Search&searchtype=simple
- http://ec.europa.eu/food/fvo/rep_details_en.cfm?rep_id=2366

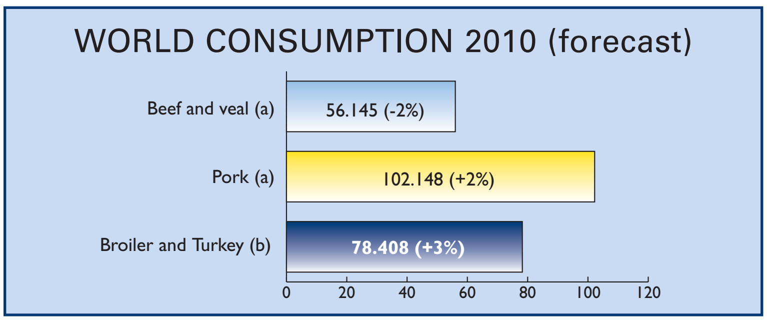
EU and global economy

In May 2010 the OECD raised its forecast for global economic growth to 4.6% for 2010. However, the economy of the Euro area is only estimated to expand by 1.2%. The economic recovery in 2010 will be most important in China, India, Brazil and more modest in the EU, the US, Japan and Russia.

Outlook for poultrymeat production

Poultrymeat production stagnated in 2008/2009 due to the global economic slowdown. In 2010 however, production is expected to pick up again with 3% especially driven by demand from the emerging economies like China, Brazil and India. Brazil's production increase is spurred by local demand and exports, China's especially by local market demand. Also India, Argentina and Russia continue to expand productions. In the EU the poultrymeat production is expected to pick up by 1% in 2010 spurred by increased domestic demand. The pick up of the production will however depend on the availability and price of feed and the continuing effects of the global crisis.

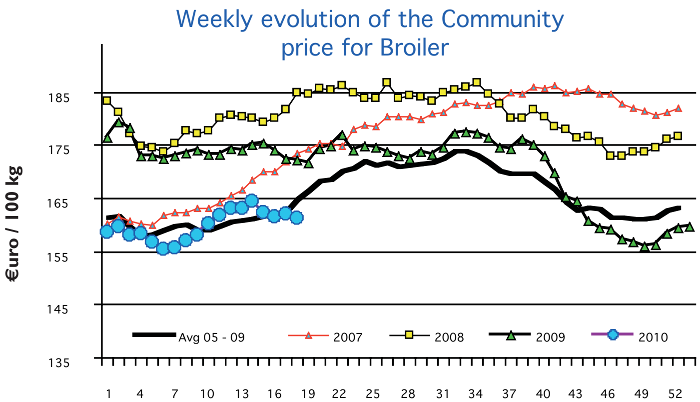




Source: USDA-FAS attaché reports, official statistics, and results of office research.
a. 1.000 Metric Tons (Carcass Weight Equivalent) **b.** 1.000 Metric Tons (Ready to Cook Equivalent)

During recession the demand for lower cost cuts increases. Even cheaper cuts are a good value low price protein and this give chicken meat a competitive advantage to more expensive beef and pork meat. With the current insecure financial perspectives current low poultrymeat prices are not expected to increase much in 2010.

Evolution of EU broiler prices 2007-2010 (average 2005-2009)



Source: DG AGRI

EU AND GLOBAL MARKET SITUATION AND PERSPECTIVES - BROILER MEAT

Broiler production expected at 73.7 million t

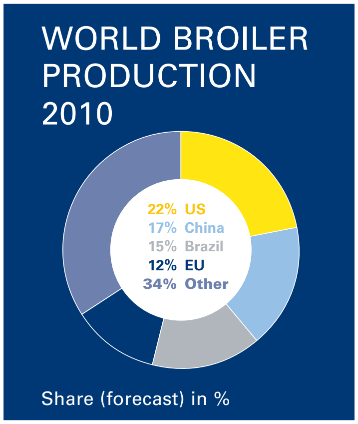
The world broiler production is expected to grow with 3% after a stagnant production in 2009. Production growth will especially come from Brazil encouraged by strong domestic demand and economic growth. The US, the world producer of broiler meat will increase production with 2% to 16.2 million t. India, Russia, Argentina are expected to encourage production as domestic demand increases.

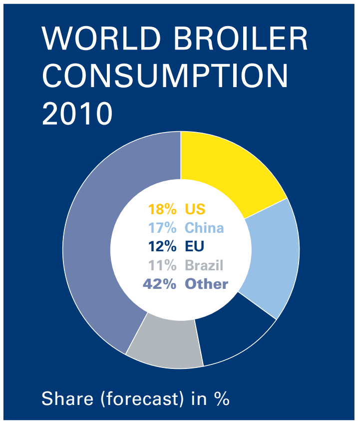
Slight increase in consumption worldwide - longer term prospects promising - but not favouring EU production

World consumption of broiler and turkey meat will expand with 2.8% and will reach 78.4 million t against 76 million t in 2009. Per capita broiler meat consumption in the EU (average EU 27 consumption in 2008 was 17.1 kilos) is expected to increase 1% from 2009 a further 5% increase till 2019 (based

(based on 2009 numbers). In the US the consumption is also expected to increase this year by 1% and by 9% to 2019 (average US per capita consumption in 2008 was 44.1 kilos).

In Russia the broiler consumption per capita will increase with 3% in 2010 (average Russian per capita consumption in 2008 was 19.3 kilos) and a forecasted increase by 2019 of 23%. Thailand, Ukraine, Taiwan, South Africa, New Zealand and Mexico are expected to follow Russia's consumption pattern by 2019.





Source: USDA - FAS April 2010

Exports of broiler meat to decline in 2010

Global exports of broiler meat will remain depressed in 2010 and are expected to decline with 4%. The EU's exports continue to face increasing competition from lower cost countries like Brazil, Thailand, China and the US. The US and Brazil account for 70% of the global trade in poultrymeat. The USA's exports may decline further in 2010 depending on Russia's trade moods (TBTs, quotas). Russia has cut its imports by 26%. Thailand's exports will increase as Thailand has recovered from the AI crisis in 2004, the industry being also more efficient. Brazil's exports may improve to the Middle East.

EU-27 boiler meat exports to fall

EU exports are forecasted to decline further in 2010 (4%), but till April 2010 exports have been about 15% higher compared to 2009. Exports to Russia are difficult as new rules on imports of frozen meat have been introduced from January 2010. The EU will continue the trend being a net importer from 2010 to 2019 (approximately 290 000 t by 2019).

Brazilian exports to slow down in 2010

Brazil saw export restrictions, currency appreciation and global crisis and exports are forecasted to grow only 1% in 2010. However, domestic demand is increasing and the production is still expanding. Brazil's exports only increased to Saudi Arabia in 2009.

US exports also to decrease in 2010

The US exports are expected to decrease with further 8% in 2010 due to Russian and Chinese export restrictions and trade disputes. The domestic market is improving and broiler prices have picked up in the US.

Global imports to decrease in most countries in 2010

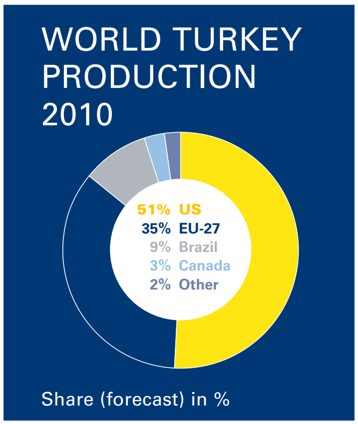
Imports will continue to decrease in Russia and Kazakhstan due to the newly created custom union, trade restrictions and incentives to increase local productions. Also newer markets in Africa like Benin, Angola have improved domestic production but have also proved vulnerable to the crisis, this also apply to key markets in Saudi Arabia and Jordan. Imports by Cuba and Venezuela are expected to decrease with as much as 25% in 2010.

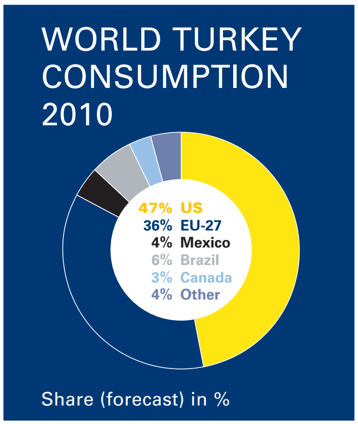
Turkey production and consumption patterns globally

The world turkey production is expected to increase 2% in 2010. Especially the US and Brazil will increase productions which will offset the decline in the European production (-500 t). The US production will increase with 40 000 t (+2%) and the Brazilian production with 43 000 t (+9%).

Consumption is expected to increase a little with 33 000 t globally spurred from demand especially in the US, Brazil Mexico and Canada. The European consumption may increase in 2010 depending on competition from other white meats.

European turkey meat prices have been under pressure from competing meats like pork and poultry, this picture will not change in 2010.





Source: USDA -FAS, April 2010

Turkey meat trade forecast to increase in 2010

Turkey meat exports are forecast to rise by 4%. Both the US and Brazil who have expanded productions will benefit from increased demands. Demands in Mexico are expected to increase with 10%, in Canada with 4%. Also in Russia the demand increases with 12% which is not entirely covered by an increase in the Russian production.

EU AND GLOBAL MARKET SITUATION AND PERSPECTIVES - SOYBEAN MEAL

Prices soybean meal

In Europe feed prices stabilised in 2009 compared to the 2008 level. The EU demand for compound feed dropped in 2009 due to crisis in both cattle and pig meat sectors. FEFAC estimates that soybean meal prices will remain stable in the EU in 2010 due to record harvests in South America which will offset fluctuations in the dollar/euro exchange rate.

At a global level soybean prices decreased by 23% in 2008/2009 compared to the 2007/2008 level due to lower demand. For the longer term perspectives it is estimated that the average price outlook remains 34% higher than that of the previous decade due to an increasing demand spurred by some economic recovery especially in Asia.

Brazil, Argentina and the US increased in 2009/2010 the soybean production with 13% which helped the global output to grow by 20%.

OECD and FAO forecast however that for longer term perspectives wheat and grain prices over the next ten years will be 15-40% higher and vegetable oil prices will be more than 40% higher (compared to 1997-2006 levels).

Feed demand long term

FAO estimates that the growing population till 2050 will increase the demand for food with 70%. For this reason prices for feed are expected to increase on a longer term perspective. The demand for both food and feed will make it necessary to increase the global cereal production from 2.1 billion t today to 3 billion t by 2050. An unpredictable factor is the competing demand from the bio-ethanol industry for cereals.

China is expected to increase its soybean imports by 2019 which will then represent 60% of total world exports by 2019 of which Brazil has a 43% share. The EU is expected to continue its transition to imports of protein meal rather than soybeans (week crush margins). Argentina is also expanding its soya production and is expected to be the major exporter by 2020.

http://www.fas.usda.gov/dlp/circular/2010/livestock_poultry042010.pdf
www.agra-net.com
www.fao.org
http://www.oecd.org/dataoecd/36/57/43117724.pdf
http://www.fapri.iastate.edu/outlook/2010/
http://www.fefac.org/file.pdf?FileID=27657

STATISTICS

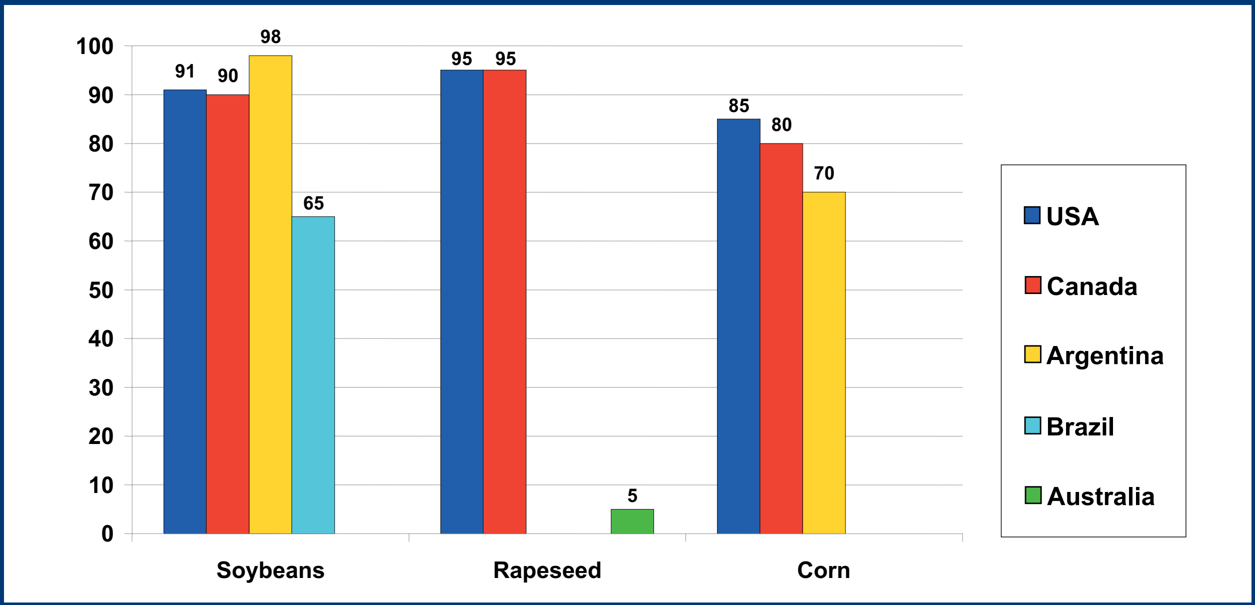
EU POULTRYMEAT SUPPLY (000' t)

	2004	2005	2006	2007	2008	2009
	EU-25			EU-27		
Gross production	10.985	11.076	10.744	11.395	11.553	11.605
Total Exports	1.300	1.240	1.240	905	936	900
Total Imports	500	640	650	864	835	850
Consumption	10.350	10.550	10.250	11.353	11.453	11.555
Consumption per capita, k	22,5	22,9	22,1	22,9	23,0	23,1
Rate of self-sufficiency %	106,0	105,0	105,0	100,4	100,9	100,4

Notes: Partial provisional or estimated.

Source: MEG to EUROSTAT and national statistics

SHARE OF GMO IN 2009 (% OF TOTAL PLANTINGS)



Source: ISAAA, USDA

POULTRYMEAT PRODUCTION IN EU (000't)

	2004	2005	2006	2007	2008	2009
Austria	114	114	109	119	119	120
Belgium/Luxembourg	295	282	278	267	263	268
Denmark	213	207	185	187	191	191
Finland	87	87	87	95	101	95
France	1.973	1.918	1.793	1.862	1.851	1.793
Germany	1.166	1.197	1.185	1.273	1.391	1.424
Greece	166	177	169	106	106	106
Ireland	122	127	121	112	98	95
Italy	1.128	1.101	984	1.056	1.106	1.116
The Netherlands	604	618	617	684	698	709
Portugal	290	296	289	318	320	327
Spain	1.310	1.302	1.283	1.283	1.306	1.312
Sweden	81	82	85	87	88	88
United Kingdom	1.574	1.581	1.535	1.460	1.421	1.447
EU-15	**9.121**	**9.090**	**8.720**	**8.909**	**9.059**	**9.091**
Cyprus	31	33	27	29	29	29
Czech Republic	217	226	213	202	196	186
Estonia	15	14	13	12	12	12
Hungary	384	375	386	376	380	383
Latvia	14	17	21	21	23	24
Lithuania	53	60	66	68	71	72
Malta	6	5	4	5	5	5
Poland	978	1.091	1.132	1.204	1.204	1.212
Slovenia	67	67	67	66	65	70
Slovak Republic	99	99	95	83	83	83
EU-25	**10.985**	**11.076**	**10.744**	**10.975**	**11.127**	**11.168**
Bulgaria	90	99	107	116	122	133
Romania	302	320	264	304	304	304
EU-27	**11.377**	**11.495**	**11.115**	**11.395**	**11.553**	**11.605**

Notes: partial provisional or estimated. For EU countries. Some significant differences between national and EUROSTAT data.
Sources: MEG to EUROSTAT, FAO and national data.

POULTRYMEAT PRODUCTION IN THIRD COUNTRIES ('000 t)

	2004	2005	2006	2007	2008	2009
Switzerland	60	58	52	60	64	65
Croatia	51	55	50	52	52	-
Turkey	894	953	933	1.083	1.102	-
Ukraine	375	497	589	689	794	-
Saudi Arabia	481	538	549	560	560	-
Japan	1.242	1.273	1.367	1.366	1.366	1.366
Thailand	964	1.036	1.048	1.072	1.105	1.130
China	13.237	14.055	14.285	15.039	15.140	15.400
Brazil*	8.723	9.681	9.708	10.763	11.471	11.460
USA*	17.925	18.539	18.680	19.089	19.574	18.667
World Production	**79.260**	**81.781**	**83.730**	**88.023**	**91.699**	**92.000**

Notes: Partly provisional, partly estimated

*Only broiler and turkey meat

Sources: MEG to EUROSTAT, FAO and national data

IMPORTS OF EU-COUNTRIES POULTRYMEAT ('000 t)

	2000	2004	2005	2006	2007	2008	2009
Poultrymeat [1]							
Austria	36	47	66	62	70	66	84
Belgium/Luxembourg	129	137	157	138	140	148	151
Denmark	17	33	39	43	42	47	42
Finland	3	4	5	4	4	5	5
France	153	180	207	211	255	276	307
Germany	386	419	470	407	457	434	398
Greece	87	51	56	48	50	56	65
Ireland	56	40	55	94	52	56	51
Italy	72	49	23	18	34	32	36
The Netherlands	175	261	283	280	408	419	379
Portugal	14	18	22	26	28	28	35
Spain	99	105	129	109	124	118	119
Sweden	14	30	33	39	35	37	38
United Kingdom	295	344	406	381	381	335	326
EU-15 3rd countries	**205**	**258**	**-**	**-**	**-**	**-**	**-**
Bulgaria	-	-	-	42	48	58	68
Cyprus	1	0	2	2	4	5	6
Czech Republic	18	54	56	58	53	64	77
Estonia	35	16	15	15	17	17	18
Hungary	21	27	43	31	33	47	41
Latvia	18	27	28	32	29	27	25
Lithuania	10	22	31	33	34	31	25
Malta	1	3	4	5	5	4	5
Poland	19	89	82	71	59	35	40
Romania	-	-	-	159	127	118	131
Slovak Republic	9	23	32	33	32	38	38
Slovenia	6	4	7	8	9	11	11
EU-25 /27 3rd countries [2]	**-**	**262**	**270**	**148**	**214**	**213**	**197**
Salted poultry meat [3]							
Germany	62	0	0	30	62	57	44
The Netherlands	35	0	0	40	119	109	127
United Kingdom	9	1	0	7	19	21	27
EU from 3rd countries [5]	**109**	**0**	**3**	**86**	**219**	**204**	**211**
Preparation of poultry [4]							
EU from 3rd countries [5]	**102**	**238**	**313**	**345**	**356**	**430**	**430**

[1] Without preparations, livers, salted meat and live poultry - 2008 partly preliminary. Data in the EUROSTAT trade statistics and trade balance are partial different.

[2] From 2007 EU 27

[3] Tariff position “0210 9029” from 2002 “0210 99 39”, almost exclusively poultry

[4] Tariff position 160231..., 1602 32..., as well as 1602 39 21, 29, 40 and 80

[5] According to the respective territorial form.

Source: MEG to EUROSTAT and national statistics

EXPORTS OF EU-COUNTRIES POULTRYMEAT ('000 t) [1)]

	2000	2004	2005	2006	2007	2008	2009
Austria	14	23	33	34	43	43	49
Belgium/Luxembourg	311	357	351	374	333	339	373
Denmark	124	121	114	99	104	105	96
Finland	2	12	12	14	15	14	13
France	736	596	560	460	477	483	479
Germany	158	275	323	323	385	416	382
Greece	6	8	11	8	16	16	13
Ireland	54	39	45	46	44	37	36
Italy	69	121	127	132	115	122	115
The Netherlands	722	613	605	716	873	886	798
Portugal	2	4	3	5	8	6	9
Spain	67	71	72	63	78	97	90
Sweden	16	13	13	38	46	29	30
United Kingdom	190	265	304	258	291	278	257
EU-15	**1.010**	**884**	**-**	**-**	**-**	**-**	**-**
Bulgaria	-	-	-	8	17	12	29
Cyprus	0	0	0	0	1	1	2
Czech Republic	9	24	27	21	22	23	23
Estonia	19	4	3	3	2	4	4
Hungary	122	125	111	91	105	124	124
Latvia	0	0	1	5	3	3	4
Lithuania	1	6	12	13	17	15	18
Malta	0	0	0	0	0	0	0
Poland	49	132	186	208	235	280	305
Romania	-	-	-	0	2	12	33
Slovak Republic	4	10	12	15	15	15	14
Slovenia	2	9	9	9	13	15	14
EU-25/27 [2)]	**-**	**936**	**889**	**872**	**757**	**857**	**887**

[1)] Without preparations, livers, salted meat and live poultry
[2)] From 2007 EU 27 - 2008 partly preliminary.
Data in the EUROSTAT trade statistics and trade balance are partial different.
Source: MEG to EUROSTAT and national statistics

3rd COUNTRY TRADE IN POULTRYMEAT AND CHICKEN MEAT ('000 t)

	2004	2005	2006	2007	2008	2009
Total imports of poultrymeat						
Switzerland	42	42	35	41	45	44
Imports of chicken meat						
Russia	1.016	1.225	1.189	1.222	1.159	913
Saudi Arabia	429	484	423	470	510	604
United Arab. Emirates	158	167	182	238	289	297
Japan	582	748	716	696	737	645
China	174	219	343	482	399	401
Hong Kong [1)]	244	222	243	215	236	253
Exports of chicken meat						
USA	2.170	2.360	2.361	2.618	3.158	3.100
Thailand	200	240	261	296	383	379
China	241	331	322	358	285	291
Brazil	2.425	2.762	2.502	2.922	3.242	3.222

[1)] Excluding transit goods.
From: MEG to USDA and national data. Partly provisional, partly estimated.

CONSUMPTION

PER CAPITA CONSUMPTION OF POULTRYMEAT IN EU (kilos)

	2004	2005	2006	2007	2008	2009
Austria	19,2	20,2	18,7	19,8	19,3	19,9
Belgium/Luxembourg	18,5	18,7	17,5	18,0	18,7	18,0
Denmark	23,0	23,5	21,7	22,5	24,0	24,4
Finland	15,9	16,2	15,6	16,5	17,0	16,6
France	23,0	23,0	24,0	25,0	23,5	23,0
Germany	17,7	17,5	16,7	17,8	18,3	18,6
Greece	19,6	20,9	19,3	20,0	20,5	21,0
Ireland	31,8	33,0	34,0	32,0	32,2	31,0
Italy	18,2	17,6	15,3	17,0	17,5	17,8
The Netherlands	21,9	22,1	21,9	22,5	22,6	23,0
Portugal	29,2	29,7	29,8	30,5	31,5	32,0
Spain	32,1	32,0	31,0	30,5	30,5	30,5
Sweden	13,5	13,0	12,8	12,5	13,0	12,8
United Kingdom	30,3	26,6	29,8	28,0	27,7	28,0
EU-15	**22,3**	**-**	**-**	**-**	**-**	**-**
Bulgaria	-	-	-	-	-	-
Czech Republic	24,2	24,9	25,7	24,0	23,8	23,9
Cyprus	38,4	-	-	-	-	-
Estonia	18,0	17,0	-	-	-	-
Hungary	37,9	37,7	32,0	32,8	31,7	31,0
Latvia	18,5	20,0	21,5	21,2	20,2	20,0
Lithuania	19,7	23,4	23,8	23,3	23,3	23,0
Malta	25,3	-	-	-	-	-
Poland	22,2	23,4	23,7	24,0	23,5	23,0
Romania	-	-	-	-	-	-
Slovak Republic	27,0	28,0	27,0	26,5	27,0	27,0
Slovenia	25,0	-	-	-	-	-
EU-25/27 [1)]	**22,5**	**22,9**	**22,1**	**22,9**	**23,0**	**23,1**
Switzerland	12,9	12,3	14,3	15,9	17,0	16,9

[1)] From 2007 EU 27

Notes: EU countries: sometimes exist considerable differences between national and EUROSTAT. Partly provisional, partly estimated.

Source: MEG to EUROSTAT, USDA and national statistics.

SELF-SUFFICIENCY IN POULTRYMEAT OF THE EU MEMBER STATES (%)

	2004	2005	2006	2007	2008	2009
Austria	73	68	70	72	75	73
Belgium/Luxembourg	180	170	180	175	165	180
Denmark	172	160	157	150	145	141
Finland	105	102	106	106	105	104
France	136	132	121	119	119	119
Germany	80	83	86	87	93	94
Greece	76	76	79	82	79	74
Ireland	100	96	95	95	88	90
Italy	107	107	110	107	108	107
The Netherlands	170	172	172	186	188	186
Portugal	95	95	92	94	93	92
Spain	96	95	96	96	97	97
Sweden	80	78	85	90	85	86
United Kingdom	87	90	85	90	95	94
EU-15	**106**	**-**	**-**	**-**	**-**	**-**
Bulgaria	-	-	76	79	-	-
Czech republic	88	89	86	87	84	80
Cyprus	95	93	91	84	-	-
Estonia	60	54	53	49	51	-
Hungary	135	123	120	128	128	130
Latvia	35	40	45	45	49	52
Lithuania	76	76	75	78	80	85
Malta	-	-	-	-	-	-
Poland	105	111	112	112	118	120
Romania	71	71	64	74	77	-
Slovak Republic	84	80	81	79	74	73
Slovenia	-	-	-	-	-	-
EU-25/27 [1]	**106**	**105**	**105**	**100**	**101**	**100**

[1] From 2007 EU 27

Notes: For EU countries considerable differences between national and EUROSTAT. Information: Partly provisional, partly estimated.

Source: MEG to EUROSTAT and national statistics.

BROILER

BROILER PRODUCTION IN EU AND 3rd COUNTRIES ('000 t)

	2004	2005	2006	2007	2008	2009
Austria	88	89	84	85	85	90
Belgium/Luxembourg	280	266	262	254	250	255
Denmark	181	180	163	171	175	175
Finland	72	72	75	84	91	86
France	973	986	886	993	1.009	990
Germany	706	741	749	826	883	930
Greece	168	165	150	161	160	160
Ireland	95	95	90	96	91	98
Italy	675	666	612	670	710	729
The Netherlands	538	552	547	612	626	640
Portugal	224	226	219	245	248	259
Spain	1.053	1.045	1.030	1.034	1.059	1.063
Sweden	70	72	75	78	78	79
United Kingdom	1.301	1.334	1.289	1.268	1.259	1.269
EU-15	**6.422**	**6.488**	**6.231**	**6.577**	**6.724**	**6.823**
Bulgaria	54	61	66	82	74	79
Czech Republic	207	206	203	195	191	181
Cyprus	33	33	27	28	28	28
Estonia	16	14	14	14	14	14
Hungary	236	235	215	217	230	245
Latvia	14	17	21	21	23	23
Lithuania	49	57	61	63	65	65
Malta	6	5	4	5	5	5
Poland	704	796	824	882	882	890
Romania	303	309	273	312	316	320
Slovak Republic	84	87	86	83	76	75
Slovenia	43	46	44	43	52	55
EU-25/27 [1)]	**7.814**	**7.984**	**7.729**	**8.522**	**8.680**	**8.802**
Argentine	866	1.010	1.159	1.160	1.160	-
Brazil	8.408	9.321	9.355	10.305	11.033	11.023
China	9.483	9.964	10.350	11.291	11.840	12.100
USA	15.451	16.042	16.103	16.387	16.741	16.098
Russia	650	900	1.180	1.350	1.550	1.775

[1)] From 2007 EU 27

Notes: Mainly provisional or estimated, official data on broiler production and consumption of only a few countries. EU data based on gross domestic production.

Source: MEG to USDA and national figures.

PER CAPITA CONSUMPTION OF BROILERS IN SELECTED EU AND 3rd COUNTRIES (kilos)

	2004	2005	2006	2007	2008	2009
Austria	12,1	12,1	11,5	11,9	11,8	12,1
France	11,8	11,9	12,9	13,7	12,9	12,7
Germany	9,2	9,3	9,0	10,1	10,2	10,7
Italy	11,0	10,2	9,5	10,7	11,0	11,4
The Netherlands	17,3	17,5	17,5	18,2	18,4	19,0
United Kingdom	23,0	21,3	23,5	22,5	22,2	22,4
EU 27	**15,6**	**16,5**	**15,5**	**16,6**	**16,9**	**17,1**
3rd countries						
Argentine	22,0	24,3	28,4	30,4	31,8	32,9
Brazil	32,6	35,5	36,4	38,8	40,6	40,3
China	7,6	7,6	7,8	8,5	8,9	9,0
India	1,5	1,7	1,7	1,9	2,1	2,1
Iran	16,6	17,3	18,5	20,2	19,9	20,7
Japan	13,4	14,8	15,5	15,3	15,1	15,3
Mexico	26,0	27,2	28,3	28,5	30,2	29,9
Russia	11,6	14,9	16,6	18,2	19,1	19,2
South Africa	20,3	22,2	24,7	25,2	27,0	27,4
United Arab Emirates	43,1	42,6	-	-	-	-
USA	43,6	44,4	44,7	44,0	43,1	41,1

Notes: Mainly estimated official data on broiler consumption of only a few countries available. Because of decreasing database continuation of earlier time series data not always available/possible.

Source: MEG, according to its own and national estimates, and national information.

TURKEY

TURKEY PRODUCTION IN EU AND 3rd COUNTRIES ('000 t)

	2004	2005	2006	2007	2008	2009
Austria	26	25	24	24	24	25
Belgium/Luxembourg	6	7	7	4	4	4
Denmark	1	0	0	1	1	0
Finland	15	14	12	11	10	9
France	624	545	519	469	456	433
Germany	358	349	331	330	386	376
Greece	3	3	1	3	3	3
Ireland	31	31	27	25	16	8
Italy	298	293	276	290	300	290
The Netherlands	32	31	30	30	29	26
Portugal	38	39	41	42	40	38
Spain	21	20	21	18	25	28
Sweden	4	3	3	3	3	4
United Kingdom	228	206	184	151	135	157
EU-15	**1.685**	**1.565**	**1.476**	**1.401**	**1.432**	**1.400**
Bulgaria	2	1	0	1	1	1
Czech Republic	19	13	9	4	4	3
Cyprus	1	1	1	1	1	1
Estonia	-	-	-	-	-	-
Hungary	143	118	127	126	120	110
Latvia	-	-	-	-	-	-
Lithuania	-	-	4	-	-	-
Malta	0	0	0	0	0	0
Poland	236	257	272	285	285	285
Romania	-	-	-	-	-	-
Slovak Republic	1	1	1	-	-	-
Slovenia	8	8	8	7	6	6
EU-25/EU 27 [1)]	**2.101**	**1.975**	**1.908**	**1.837**	**1.860**	**1.818**
Brazil	315	360	353	458	438	437
USA	2.474	2.497	2.577	2.703	2.833	2.569
Canada	145	155	163	169	180	170

[1)] From 2007 EU 27

Notes: Partial provisional or estimated, official data on turkey production only a few countries. EU data based on gross domestic production.

Source: MEG to FAO, USDA and national data.

PER CAPITA CONSUMPTION OF TURKEYS IN SELECTED EU AND 3rd COUNTRIES (kilos)

	2004	2005	2006	2007	2008	2009
Austria	6,0	6,9	6,0	6,5	6,2	6,4
France	6,0	5,8	5,7	5,5	5,2	5,0
Germany	6,5	6,2	5,9	5,7	6,2	6,0
Italy	5,3	5,0	4,5	5,0	5,0	4,9
The Netherlands	1,9	1,9	1,6	1,5	1,2	1,1
United Kingdom	5,0	4,0	4,5	4,0	3,9	4,0
EU 27	**4,0**	**3,8**	**3,7**	**3,6**	**3,5**	**3,4**
3rd countries						
Brazil	1,0	1,1	1,0	1,5	1,2	1,4
Canada	4,3	4,4	4,4	4,5	4,9	4,6
Mexico	1,5	1,9	1,9	2,0	2,0	1,7
Russia	0,8	0,9	0,8	0,7	0,7	0,6
USA	7,8	7,6	7,6	8,0	7,9	7,7

Notes: Mainly estimated official data on turkey consumption of only a few countries available. Because of decreasing database continuation of earlier time series is not always possible.
Source: MEG, according to own and national estimates and information.

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DUCK

DUCK PRODUCTION IN EU 27 (‘000 t)

	2004	2005	2006	2007	2008	2009
Austria	0,1	0,1	0,1	0,1	0,1	0,1
Belgium/Luxembourg	0,2	0,2	0,2	0,0	0,3	0,4
Denmark	4,2	4,1	4,5	0,0	0,0	0,0
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	239,0	252,0	261,5	272,0	270,0	249,0
Germany	45,0	50,8	49,8	63,6	67,1	69,2
Greece	0,2	0,3	0,1	0,2	0,2	0,2
Ireland	6,3	6,5	6,5	6,5	5,8	3,9
Italy	15,0	15,0	15,0	15,0	15,0	15,0
The Netherlands	13,0	16,0	17,0	17,0	17,0	17,0
Portugal	8,0	8,0	8,0	9,0	10,0	10,0
Spain	0,0	0,0	0,0	0,0	0,0	0,0
Sweden	0,1	0,2	0,2	0,2	0,0	0,0
United Kingdom	41,0	45,0	45,0	38,0	35,0	30,0
EU-15	**372,1**	**398,2**	**407,9**	**421,6**	**420,4**	**394,7**
Bulgaria	7,1	16,1	18,2	16,8	13,0	17,5
Cyprus	0,2	0,2	0,2	0,2	0,2	0,2
Czech republic	3,7	3,8	3,8	5,9	8,8	8,0
Estonia	-	-	-	-	-	-
Hungary	55,0	63,0	42,0	58,0	49,0	55,0
Latvia	-	-	-	-	-	-
Lithuania	0,2	0,2	0,2	0,2	0,3	0,3
Malta	-	-	-	-	-	-
Poland	18,0	18,0	16,0	17,0	17,0	17,0
Romania	-	-	-	-	-	-
Slovak Republic	0,6	0,5	1,0	0,5	0,4	0,4
Slovenia	1,2	1,2	1,2	1.2	-	-
EU-25/EU 27 [1)]	**466**	**500**	**488**	**536**	**525**	**510**

[1)] From 2007 EU 27
Notes: Partial provisional or estimated (base = gross domestic production), official data on duck production of only a few countries.
Source: MEG to FAO and national data.

PROJECTIONS

POULTRYMEAT MARKET PROJECTIONS FOR THE EU-27, 2009-2018 (RTC)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Gross indigenous Production	**11.532**	**11.117**	**11.371**	**11.598**	**11.418**	**11.362**	**11.453**	**11.669**	**11.806**	**11.843**
Of which chicken meat*	8.620	8.698	8.729	8.772	8.832	8.895	8.939	8.982	9.023	9.061
Of which other poultry	2.912	2.419	2.642	2.826	2.586	2.467	2.514	2.687	2.783	2.782
Import	**829**	**950**	**976**	**1.002**	**1.028**	**1.054**	**1.081**	**1.107**	**1.133**	**1.159**
Exports	**920**	**901**	**912**	**918**	**904**	**896**	**895**	**902**	**904**	**900**
Net trade	**91**	**-49**	**-64**	**-84**	**-124**	**-158**	**-185**	**-205**	**-229**	**-259**
Consumption	**11.460**	**11.174**	**11.435**	**11.684**	**11.542**	**11.520**	**11.638**	**11.874**	**12.035**	**12.102**
Per Capita Consumption	**20,4**	**19,9**	**20,3**	**20,7**	**20,4**	**20,4**	**20,6**	**21,0**	**21,3**	**21,4**

Source: OECD FAO Agricultural Outlook 2010-2019. Earlier avec reports have used DG AGRI statistics. For this reason significant variations occur. Data from DG AGRI not available by August 2010.
The RTC weight used by OECD FAO for poultrymeat corresponds to a ready to cook weight (approximately 73% of live weight depending on species and country)

* FAPRI data as these data are not available from OECD FAO

OVERALL MEAT MARKET PROJECTIONS FOR THE EU -27, 2009-2018 (CWT AND RTC)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Gross Indigenous Production	**42.449**	**42.284**	**43.095**	**42.472**	**42.364**	**42.364**	**42.455**	**42.739**	**43.091**	**43.156**
Imports	**1.548**	**1.724**	**1.706**	**1.734**	**1.830**	**1.900**	**1.996**	**2.061**	**2.089**	**2.118**
Exports	**2.480**	**2.414**	**2.371**	**2.312**	**2.225**	**2.193**	**2.186**	**2.157**	**2.119**	**2.081**
Net trade	**932**	**690**	**665**	**578**	**395**	**293**	**190**	**96**	**30**	**-37**
Consumption	**41.534**	**41.604**	**42.430**	**42.114**	**41.973**	**42.152**	**42.533**	**42.818**	**43.043**	**43.160**
Per capita consumption	66,8	66,9	67,9	67,4	67,1	67,3	67,9	68,4	68,8	69,0
Beef and Veal CWT	11,6	11,6	11,5	11,4	11,4	11,3	11,3	11,2	11,2	11,1
Sheep/goat CWT	2,3	2,3	2,2	2,2	2,2	2,1	2,1	2,1	2,1	2,1
Pig meat CWT	32,5	33,1	33,9	33,1	33,1	33,5	33,9	34,1	34,2	34,4
Poultry RTC	20,4	19,9	20,3	20,7	20,4	20,4	20,6	21,0	21,3	21,4

Source: OECD FAO Agricultural Outlook 2010-2019. Earlier avec reports have used DG AGRI statistics. For this reason there are significant variations e.g. in per capita consumption as stated by DG AGRI and in the current table based on data drawn from OECD FAO.
The RTC weight used by OECD FAO for poultrymeat corresponds to a ready to cook weight (approximately 73% of live weight depending on species and country)

TABLE EU 27 POULTRYMEAT IMPORT - EXPORT TRADE MAIN TARIFF LINES, 2000 - 2005 - 2008 - 2009

IMPORTS

Source: Eurostat June 2010

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2000	2005	2008	2009	2008	2009
0207	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	**1.253.230**	**4.208.170**	**1.960.436**	**1.800.284**	**195,98**	**171,05**
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens'	37.605	102.912	156.776	147.734	123,71	116,48
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	657.901	2.408.760	1.253.204	1.058.223	230,94	209,66
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	195.491	716.288	79.380	131.557	86,94	81,77
02071460	Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in	131.120	406.058	134.688	143.020	110,55	108,88
02072710	Frozen boneless cuts of turkeys of the species domesticus	79.809	168.457	130.544	110.442	320,99	241,7
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**		**32.804**	**2.040.192**	**2.115.069**	**211,01**	**195,80**
1602	**PREPARED/PRESERVED MEAT**	**862.051**	**3.091.037**	**4.298.572**	**4.301.656**	**277,87**	**260,93**
160231	TURKEYS	300.920	945.610	1.065.224	966.858	261,86	228,14
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	289.398	927.902	1.028.739	936.519	258,27	223,87
160232	GALLUS DOMESTICUS	542.887	2.075.458	3.132.502	3.205.149	273,66	257,70
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	38.322	382.051	107.401	180.134	215,67	235,09
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	496.559	1.630.358	2.526.521	2.297.074	291,13	282,66
16023230	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultrymeat or offal (excl. of turkeys and guinea fowl etc.)	7.203	56.310	485.042	692.956	192,07	176,63
16023290	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus (excl. that containing >= 25% meat or offal of poultry, meat or offal of turkeys or guinea fowl, etc.)	804	6.739	13.538	34.985	396,89	340,89
160239	OTHER	18.244	69.969	100.846	129.649	577,81	585,58
16023929	Cooked, prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus, containing >= 57% meat or offal of poultry	16.642	56.094	97.526	124.089	580,55	589,16

EXPORTS

Source: Eurostat June 2010

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2000	2005	2008	2009	2008	2009
0207	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	**8.984.291**	**7.399.228**	**7.093.323**	**7.376.212**	**101,42**	**97,67**
02071210	**Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',**	526.148	238.326	128.053	139.344	101,32	106,56
02071290	**Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens',**	2.692.599	2.226.673	2.547.377	2.599.889	111,34	101,44
02071410	**Frozen boneless cuts of fowls of the species Gallus domesticus**	894.080	1.088.275	1.624.285	1.751.290	55,42	56,79
02071430	**Frozen whole wings, with or without tips of Gallus domesticus**	945.626	645.813	635.915	793.324	86,69	109,37
02071460	**Frozen legs and cuts thereof of fowls of the species gallus**	357.815	279.290	185.271	221.721	73,93	80,24
02071470	**Frozen cuts of Gallus domesticus, with bone in (excl. halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof**	283.426	853.245	342.186	363.899	72,57	76,59
02072710	**Frozen boneless cuts of turkeys of the species domesticus**	1.563.698	581.402	418.255	302.536	89,96	60,82
02072730	**Frozen whole wings, with or without tips, of turkeys**	121.849	179.604	186.992	186.472	119,97	124,32
0207 other		1.599.050	1.306.600	1.024.989	1.017.737	191,35	182,48
1602	**PREPARED/PRESERVED MEAT**	**294.931**	**289.899**	**436.652**	**449.596**	**287,71**	**278,39**
16023219	**Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry**	111.459	136.561	167.195	157.286	274,50	291,2
16023230	**Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultrymeat or offal (excl. of turkeys and guinea fowl etc.)**	38.938	56.368	118.846	123.578	307,28	296,53
16023980	**Prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus (excl. that containing >= 25% meat or offal of poultry, etc.)**	42.322	16.777	44.745	63.991	149,90	123,66
1602 other		102.212	80.193	105.866	104.741	344,86	332,26

UPCOMING AND PENDING LEGISLATIVE PROPOSALS

ANIMAL WELFARE

Animal welfare in general

The Lisbon treaty entered into force in December 2009 and opens for new initiatives on animal welfare since the treaty recognizes animals as sentient beings. The EU wants to be a model for global animal welfare, European consumers want animal welfare. The Commission is expected to formulate a new animal welfare action plan from 2011based on input from a consultation to be held in December 2010. The Commission will keep in mind the rules on the internal market and that farming must continue to be economically sustainable. This will be a major future challenge.

Council Regulation 1099/2009 on the protection of animals at the time of slaughter

The new regulation replaces Directive 93/119 on the protection of animals at the time of slaughter and was adopted in September 2009. It enters into force in January 2013.
Especially issues on the currents used for electrical waterbath stunning of poultry are at stake.

AHAW (EFSA panel on animal health and welfare) project delivered in October 2009 a report to EFSA to develop guidelines for welfare risk assessment at stunning. This report was published by EFSA later in 2009.
http://www.efsa.europa.eu/en/scdocs/scdoc/11e.htm

Review of Regulation 1/2005 on the protection of animals during transport

The proposal is still within the Commission services and is only expected to be finalized by 2011. Poultry issues are according to **avec's** latest information not involved in the revision.

Minimum rules for protection of chickens kept for meat production, Directive 2007/43

The directive entered into force in June 2010. **avec** has been encouraging harmonized EU standards at farm level and has with EPB and EFFAB delivered input on 'The influence of genetic selection on the welfare and the resistance to stress of commercial broilers' and 'Welfare aspects of the management and housing of the grandparent and parent stocks raised and kept for breeding purposes'.

ANIMAL HEALTH

COM 539/2007, Animal Health Law

The Commission has in May 2008 published a scoping paper on a horizontal legal framework, an Animal Health Law to integrate principles and requirements of trade, imports, animal disease control and welfare. A proposal is expected to be presented in December 2010.

Draft Regulation for novel foods COM (2008) 0002 including cloned animals

Despite the very cautious scientific opinion of ESFA published in July 2008 and the European Parliament's ban on food from cloned animals and their offspring in September 2008 the Council of Ministers decided in June 2009 to include food produced from animals obtained by cloning techniques and from offspring of cloned animals in the draft regulation for novel foods. The draft has been discussed again in the Council in March and in the Parliament in May 2010. The Parliament has now requested that the Commission present a separate legislative proposal on cloning. In May 2010 DG SANCO promised the Parliament a report on cloning by the end of 2010. The Commission and Parliament are still discussing whether food produced from offspring of animals obtained by cloning techniques should be considered novel food.

FOOD AND FEED SAFETY

Evaluation of the Hygiene Package - 852, 853, 854/2004

The process of revision of the Hygiene “package” (regulation 852/2004 on hygiene of foodstuffs, regulation 853/2004 laying down specific hygiene rules for food of animal origin, and regulation 854/2004 laying down detailed rules for the organisation of official controls on products of animal origin intended for human consumption) has started in May 2008 and is still ongoing. At stake is among other issues the definition of MSM and training of company auxiliaries.

Regulation 2160/2003 on the reduction of Salmonella in poultrymeat

The regulation requires 'absence of Salmonella in 25 g poultrymeat' from December 2010. In June **avec** noted with pleasure that the Commission will change the criteria to concern only Salmonella typhimurium and Salmonella enteritidis. A proposal from the Commission is expected soon. **avec** is closely following the next steps.

Regulation 1069/2009 replacing Regulation 1774/2002 on animal by-products

The new regulation enters into force in 2011. **avec** is hoping for classifying hatchery by-products as category 3 and for the reintroduction of the use of processed animal proteins in animal feed by further development of dedicated lines and reliable testing methods.

AMR - antimicrobial resistance - SANCO/6876/2009r

The Commission held from January to March 2010 a public consultation on a working paper on ongoing EU activities related to AMR risk monitoring, assessment and management. **avec** has together with EPB replied to this consultation.

Antimicrobial treatment (AMT)

In January 2010 opened a public consultation on the revision of the joint AFC (Panel on additives, flavourings, processing aids and materials in contact with food)/BIOHAZ (Biological hazards) guidance document on the submission of data for the evaluation of the safety and efficacy of substances for the removal of microbial surface contamination of foods of animal origin intended for human consumption. **avec** has firmly rejected the use of chemical substances.

Campylobacter

Based on recent reports from EFSA on the high prevalence of Campylobacter especially in poultrymeat, EFSA has in May 2010 send questionnaires to Member States to report intervention measures by Member States. **avec** has set up an expert group. The group has developed a position paper. So far no reliable Campylobacter "cure" is available to the industry.

MARKETING STANDARDS AND LABELING

Commission Regulation 1047/2009 amending Regulation (EC) No 1234/2007 establishing a common organisation of agricultural markets as regards the marketing standards for poultrymeat.

The new regulation entered into force May 1st 2010. Most important is that poultrymeat or poultry preparations sold as "fresh" cannot have been frozen previously.

Animal welfare (AW) labeling

In October 2009 the long waited report on the feasibility of labeling of animal welfare was published. The report delivers input on the communication of AW to consumer, the incentives to farmers by increased prices, the establishment of an AW assessment centre to deliver scientific and transparent information and the international trade aspects. WTO accepts only voluntary labeling schemes on animal welfare. The report will be the basis for further discussions with Member States, trade partners and other stakeholders in 2010/2011.

COM (2008) 40 proposal on the provision of food information to consumers - revision of existing regulations on general food labelling and nutrition labeling

The last Parliament plenary vote took place in June 2010. The report has been under preparation since 2008. The first reading amendments from the Parliament will a.o. require mandatory labeling of origin of meat, front of pack content of energy, salt, sugar, fat and saturated fat accompanied by guideline GDAs per 100 g/100 ml. Furthermore frozen meat should carry a production date and the first step would be made to include MSM standardised by the Histalim method in the meat content. The final definitions decided on "origin"are expected to influence the labeling decisions on "origin" in the "quality of agriculture production".

DISCUSSION - SUSTAINABLE DEVELOPMENT - FUTURE CHALLENGES

FAO, UNEP and multiple climate change studies plead for rapid measures to ensure sustainable production and consumption patterns to reduce depletion of scarce natural resources.

UNEP's June 2010 report concludes that two areas are currently having a disproportionally high impact on people and the planet's life support systems: fossil fuels and agriculture especially the raising of livestock and dairy products. The suggested cure is more financial policies and creative policy-making for internalizing the costs of unsustainable production, a suggestion that was immediately welcomed by DG ENVI's Commissioner Potocnik.

Agriculture globally accounts for almost 70% of total water consumption. In Britain farming takes only 3% of all water withdrawals, in the US 41% goes for agriculture, in China this is 70% and in India water use is close to 90%. It takes twice as much water to grow a kilo of peanuts as a kilo of soyabean, and nearly four times as much to produce a kilo of beef as a kilo of chicken.

In the UK an estimated 20 million t food is wasted every year, households account for 8.3 million t, retail for 1.6 million t, food manufacturers for 4.1 million t and the reminder is wasted by food services like restaurants and hospitals.

Many voluntary schemes exist on the communication of sustainable production. So far however, no harmonised standards and communication tools exist which take into account all steps of the production chain. This blurs the transparency of the communication on sustainable foods.

The Commission launched in March 2009 a **Retail Forum** to promote more sustainable consumption in the European Retail Sector.

In response to this initiative the European farmers and food industry set up a **Round Table on the Sustainable Consumption and Production (SCP)**. The round table is co-chaired by the Commission. Members of the round table are a.o. Copa-Cogeca, CELCA, CIAA, **avec**, FEFAC, FEFANA and FVE.

The objectives behind the initiative are to define and develop principles and guidelines for the assessment of the environmental performance of food and drink products and establish a framework assessment methodology based on scientific methods and evidence. Furthermore the SCP will develop principles for voluntary information to consumers on environmental initiatives and sustainable production and map already existing initiatives to improve a sustainable production and non environmental aspects. Finally it is the intention to map international activities and externalities of initiatives. By the end of 2011 the SCP hopes to be able to deliver some transparent assessment methodologies to the benefit of the food producing industries.

In April 2010 UECBV established a **taskforce** on climate change to counterbalance the misleading messages and to promote a holistic coordination of the stewardship of natural and human resources for continued agricultural production capable of supporting a growing world population nutritionally, socially, ecologically and economically.

Measures to reduce meat consumption or encourage more sustainable consumer's consumption “feel guilty when eating meat” “love food hate waste campaign” are planned or have been launched. In December 2009 Paul McCartney promoted a “meat free” Monday in a European Parliament happening.

The poultry producers globally have a common interest in continuing to improve the efficiency of the production and in promoting the most transparent assessment methodologies. The incentives are not new - the image of the food producer with his consumers/customers and the consumer's image - and the overall safety and cost efficiency of the production chain always come first. The European poultry producers have the advantage of producing high quality animal protein with relatively little input. Poultrymeat is sustainable compared to other meat types.

At the end the global food security is at stake.

It is important to educate consumers and that they change buying and consumption patterns.

The most sustainable production method should well balance the different interests and must be manageable in terms of food security, food safety and environmental impacts. The effect of higher taxes on food with the aim to reduce the use of scarce resources and influence the consumption patterns is controversial.

If you want to read more on this:

European Commission Retail Forum:
http://ec.europa.eu/environment/industry/retail/about.htm
Round Table on the Sustainable Consumption and Production:
http://www.food-scp.eu/
UNEP on fossil fuels and feeding the world:
http://www.unep.org/Documents.Multilingual/Default.asp?DocumentID=628&ArticleID=6595&l=en
FAO:
FAO on IPPC mitigating greenhouse gases especially in agriculture in developing countries, May 2009 link:
http://www.fao.org/news/story/en/item/20243/icode/
http://www.fao.org/docrep/010/a0701e/a0701e00.HTM
DG AGRI on agriculture's impact on the environment, April 2009
http://ec.europa.eu/agriculture/climate_change/index_en.htm
Food Waste in the UK study carried out by WRAP/DHL 2010
http://www.wrap.org.uk/retail/food_waste/supply_chain_food.html
Love food hate waste
http://www.lovefoodhatewaste.com/http://www.lovefoodhatewaste.com/
IMPRO study on sustainable meat production from the Commission's Joint Research Centre and IPTS, April 2008: poultrymeat most sustainable of meats:
http://ftp.jrc.es/EURdoc/JRC46650.pdf
www.economist.com/specialreports

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