# 2011

# 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**


**a.v.e.c. secretariat**
Rue du Luxembourg 47-51
B-1050 Brussels
Belgium
Phone +32 2 238 10 82/83/80
Fax +32 2 238 10 84

**Secretary General:**
Untill 1 April 2011
Tage Lysgaard
tl@avec-poultry.eu

From 1 April 2011
Cees Vermeeren
cv@avec-poultry.eu

**Senior Policy Adviser:**
Marianne Nichols
mn@avec-poultry.eu

**Policy Adviser:**
Carmen A. Turcu
ct@avec-poultry.eu

e-mail: avec@avec-poultry.eu
web: www.avec-poultry.eu



**a.v.e.c.** *wants to thank BPC, CIDEF, ZDG, Rose Poultry, Dansk Landbrug for their contribution to the annual report 2011*

# INTRODUCTION BY THE PRESIDENT AND THE SECRETARY GENERAL

The global demand for meat is increasing as incomes in Asia, Latin America, Africa and Eastern Europe increase. Land for agricultural production is becoming increasingly scarce and the challenge for EU poultry producers is to ensure production is sustainable in a global context.

In terms of carbon footprint and land use poultrymeat is the most sustainable meat produced in the EU.
Despite this, the EU production of poultrymeat is not forecast to increase over the next decade. Furthermore the EU poultry sector is challenged by increasing imports from third countries fuelled by too generous EU trade agreements trading off parts of EU poultry production. Long term EU food security is threatened if this political line continues.

In the current revisions of the regulations on the food safety and hygiene criterion for poultrymeat **a.v.e.c.** has been successful in promoting the inclusion of only 2 major serotypes of Salmonella. Since monitoring of Salmonella started in the EU **a.v.e.c**.'s members have been successful in decreasing the prevalence by improving biosecurity and HACCP measures. The next food safety challenge to be handled by **a.v.e.c.** is Campylobacter and antimicrobial resistance. **a.v.e.c.** is proactively addressing both this question and the risks.

The current marketing standards for poultry are also under revision. **a.v.e.c**. has fought for an EU farming label of origin with the mention of the Member State. **a.v.e.c**.'s argument is that high EU standards apply to the entire EU poultry production. Origin labeling will be laid down finally in the proposal on food information to consumers, where the Council's request for mandatory country labeling of origin seems to be the outcome of the co-decision procedure.

**a.v.e.c.** requests that the high EU food safety and animal welfare standard are applied also to imported poultry meat. The standards considerably increase the costs of EU poultry producers faced with increasing prices of feed ingredients. The EU policy instruments must be maintained.

**a.v.e.c.**'s Brussels office cooperates closely with the European institutions and is actively involved in discussions with other stakeholders. On a global scale **a.v.e.c.** continues to contribute and participate in the work of the International Poultry Council.

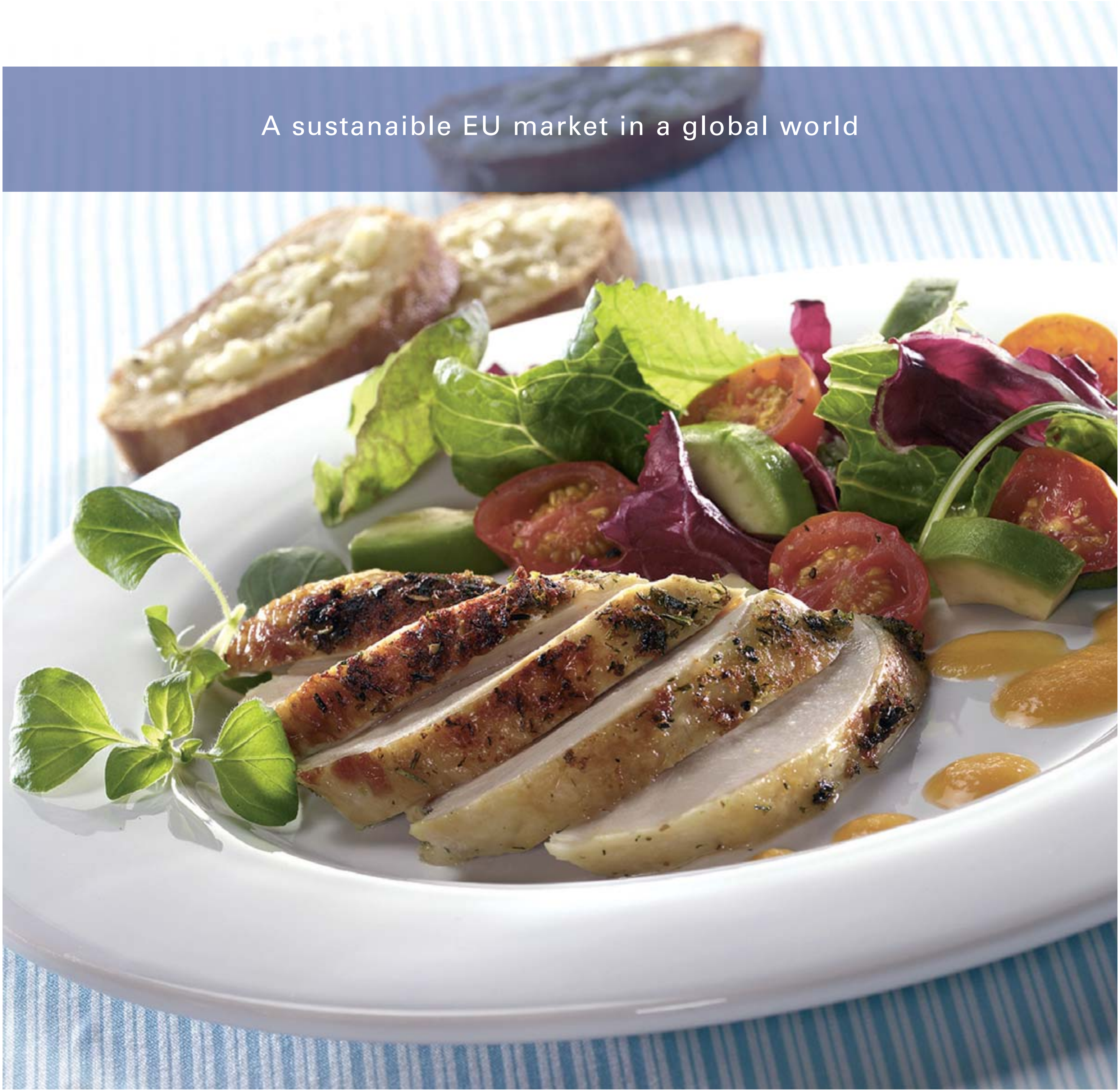
In 2011 **a.v.e.c.**'s Secretary General for more than 38 years, Tage Lysgaard stepped down. The EU poultry sector is grateful for Tage Lysgaard's commitment and contribution to the growth of the sector. Cees Vermeeren, director of **a.v.e.c.** is today also Secretary General of **a.v.e.c.**.

**a.v.e.c.** will continue to do its utmost to ensure that the cooperation and representation at the European policy level is carried forward through it's new Secretary General to the benefit of its members and of the European consumers.

Jan Odink
President

Cees Vermeeren
Secretary General

# A sustanaible EU market in a global world



# **a.v.e.c.** – OUR ASSOCIATION

**Who are we?**

**a.v.e.c.** is a voluntary, non-profit association created in 1966. As a European unit **a.v.e.c.** 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. **a.v.e.c.** members represent 95% of the EU poultrymeat production.

**a.v.e.c.** influences the drafting of EU legislation, which has consequences for the industry and for EU consumers and strives to improve the established and 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 **a.v.e.c.** keeps good relations with the changing MEPs, a cooperation of key importance.

**Objectives**

The main objectives of **a.v.e.c.** 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 poultry meat 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 **a.v.e.c.** 's secretariat was established in Brussels. The office is managed by Cees Vermeeren, Director and Secretary General, and added a policy adviser to the staff in 2007 and a second policy adviser in 2011. Tage Lysgaard completed his mandate in 2011 after 38 years in **a.v.e.c.**.

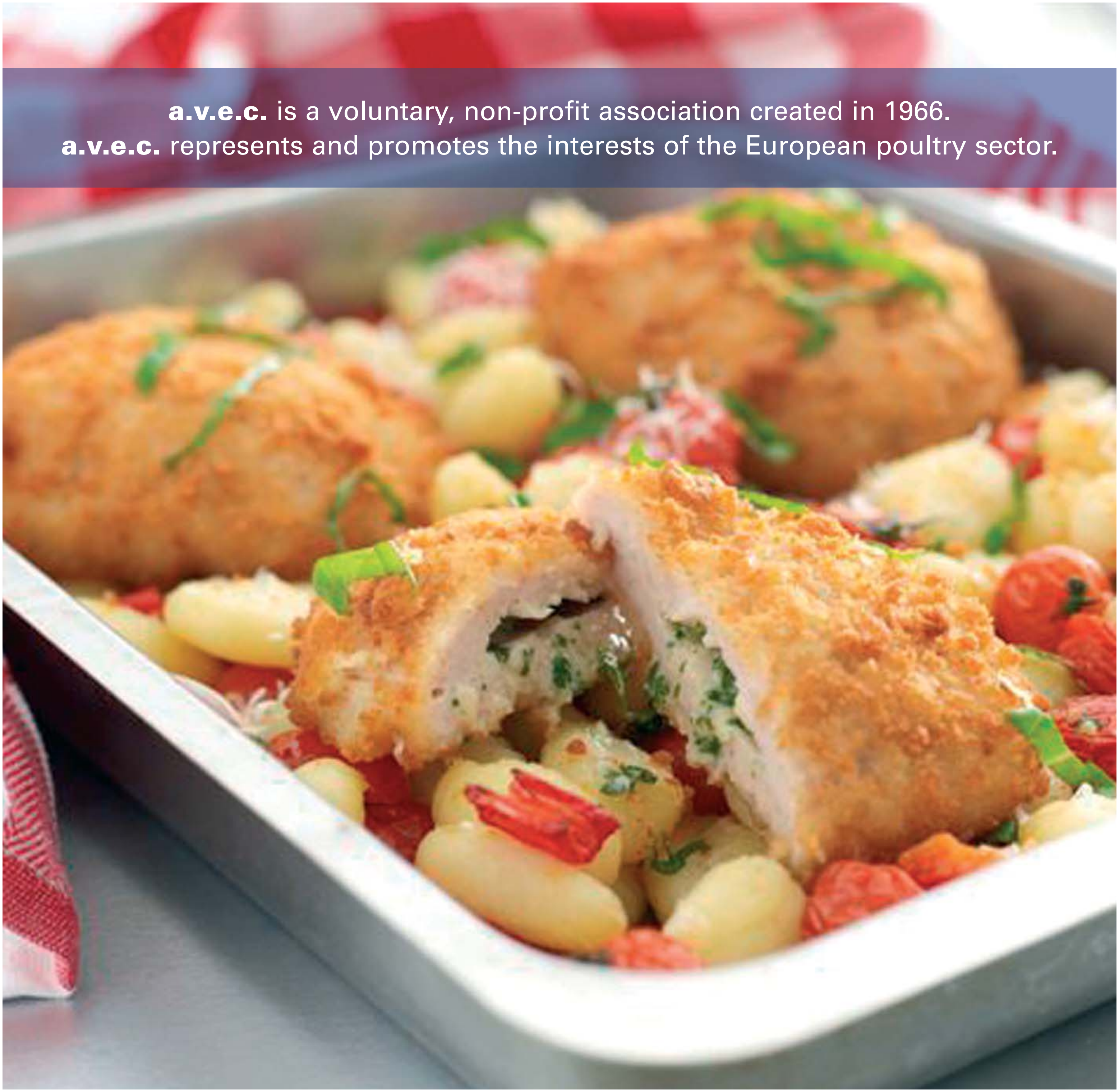
On a daily basis the secretariat of **a.v.e.c.** gathers and distributes information and analysis on current issues to the member organisations and communicates with the European institutions and other partners. **a.v.e.c.** is also intermediary and adviser to its member organisations.

**The Presidency and the Board**

Jan Odink, president of the Dutch poultry association NEPLUVI, was elected president of **a.v.e.c.** in 2010. The president leads board meetings and the General Assembly and he assists the secretariat in its daily work whenever possible.

**a.v.e.c.** has four vice-presidents, Federico Felix from Propollo/AMACO, Spain, Paul Heinz Wesjohann of the German BVG, Bruno Veronesi from UNA, Italy, and Paul Lopez from FIA/CIDEF, France. The presidency and vice-presidency are for election every two years and are renewable.

**a.v.e.c.** member organisations are represented in the Board by one Board Member and one deputy Board Member. Board meetings are held four times a year. **a.v.e.c.** 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 opportune. The General Assembly takes place on a yearly basis, usually in September or October, and up to 150 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.



**a.v.e.c.** is a voluntary, non-profit association created in 1966.
**a.v.e.c.** represents and promotes the interests of the European poultry sector.

# OUR MEMBERS

**a.v.e.c.** 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 poultry meat production.

The members participate in the daily work of **a.v.e.c.**. 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
ZDG - Bundesverband der Geflügelschlachtereien e.V.

### HUNGARY
BTT - 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
UCPR - 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

NEPLUVI

Pro Pollo

UNA

SVENSK FÅGEL

VIP - BELGIE

bpc

avec

FIA

Baromfi Termék Tanács

ETL

BVG

KRD

Izba Gospodarcza

GIZ Mesne industrije

Uniunea Crescătorilor de Păsări din România

UCPR

ancave

# EU AND INTERNATIONAL KEY PARTNERS

**a.v.e.c.** cooperates with many other international organisations depending on the issues at stake. **a.v.e.c.** 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.

**a.v.e.c.** 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 **a.v.e.c.** 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 2011.

Depending on the issues, **a.v.e.c.** 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* and **EFFAB**, European Forum of Farm Animal Breeders.

The **a.v.e.c.** 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 **a.v.e.c.** 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.

# **a.v.e.c.**, 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 many countries and counts 24 member countries.

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, WHO 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

and with Codex Alimentarius and FAO

- Public - private standards
- Campylobacter

### 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, **a.v.e.c.**
- 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
  Dr. Vivien Kite, ACMF, Australia
- Represents more than 80% of world broiler production and about 95% of world poultry trade.

### Recent IPC Conferences

- *Rome,* Italy, 2009
- *Sydney*, Australia, 2009
- *Paris*, France 2010
- *Santiago*, Chile, 2010
- *Rome,* Italy, 2011
- *Livingstone,* Zambia, 2011

### 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 an observer in OIE and Dr. Vivien Kite and Dr. Thomas Janning are nominated as the IPC observers. They are participating actively in developing animal welfare recommendations related to broiler production systems. In April 2010 a memorandum of understanding was signed by FAO and IPC during the IPC spring meeting in Paris. IPC was awarded the status of observer in the Codex Alimentarius. Alling Yancy and Cees Vermeeren have been nominated as observers and they follow up the relevant issues in the Codex committees, especially on food hygiene and food labelling.

## **a.v.e.c.** FOCUS

This section gives an overview of the main themes **a.v.e.c.** is working with in 2010-2011. You will find a more general description of the issues at stake combined with a brief outline of **a.v.e.c.'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

# POULTRY MEAT - A SUSTAINABLE EU MARKET IN A GLOBAL WORLD

**Which direction for the EU food security and poultry meat situation in the years to come?**

EU food security is under pressure. The net trade position of the EU poultry meat sector is projected to deteriorate over the next 10 years driven by a steady increase in meat imports (mainly of poultry meats and beef) and a parallel decline in meat exports (of poultry, beef and pig meats).

**The food choices we make** do not only influence our own health, they also have a large impact on the environment. Over the last 50 years, diets in the EU, generally, have shifted towards higher consumption levels of meat, fish and dairy. A similar shift is currently taking place in parts of Asia and South America, leading to a strong rise in global demands for meat, dairy and fish with consequential increases in environmental impacts.

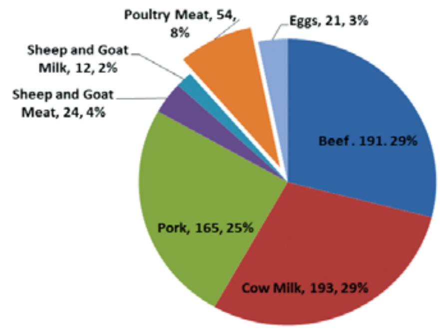
**Greenhouse gas emissions lowest for poultry**

The EU citizens consume 12% of the global meat consumption and the consumption per capita is about 23 kg, twice the global average. The additional amount of land needed for the production of animal protein to meet increasing demands for meat as income levels increase depends on the efficiency of the production type selected. Depending on the production type the emissions will increase more or less. Resource efficiency of the animals matters.

The efficient digestion process and the absence of enteric fermentation place poultry meat as the most sustainable meat in terms of low values of greenhouse gas emissions. In terms of carbon footprint and land use, per kilo of product, life cycle assessment studies show that the production of poultry compared to other meat producing species emits less $CO_2$ and uses only half the land $m^2$/kg compared to that of pigs. Only fish and milk as supplies of animal protein have lower impacts. Nevertheless, further improvement should be possible and the poultry businesses are committed to work on that.

**It makes sense to promote efficient and sustainable EU poultry meat production.**

**Total GHG emission fluxes EU-27: 661 MT $CO_2$-eq**




Source: Total GHG fluxes of EU-27 livestock production in 2004, calculated with a cradle-to-gate lifecycle analysis with CAPRI

**What are the main factors affecting consumption of poultry meat?**

The relatively low and competitive pricing of poultry compared to that of other meats, the relative absence of cultural or religious obstacles, and dietary and nutritional (protein) qualities are the main factors explaining its attractiveness.

Meat, dairy, eggs and fish are important components of the European diet. These animal products are not only important in terms of taste and tradition; they also provide essential nutrients such as proteins, iron, calcium and vitamins. Livestock production and fisheries are important economic sectors for Europe's rural areas.

In recent years climate changes, volatile input prices, unfavourable trade agreements and political instability have affected poultry production. The effect has been forcing costs upwards and if the current pessimism is followed by poor harvests grain prices could stay high. European poultry production costs are increasing and margins are squeezed.

**FACTS ON EUROPEAN POULTRYMEAT PRODUCTION**

- Main user of cereals, about 16% of wheat and maize production in the EU.
- The 2nd meat producer after pork in Europe.
- The poultry sector is one of the least supported sectors in the EU by the CAP.
- Meat production (2010): 11.642.000 tons carcass weight.
- Slaughtered animals for meat production (2010): 6.036.000.000 animals.

Source: a.v.e.c. estimates and Eurostat extraction June 2011

## GLOBAL PICTURE OF THE POULTRY SECTOR

| | EU-27 | USA | BRAZIL | CHINA | RUSSIAN FEDER. | UKRAINE | THAILAND | WORLD |
|---|---|---|---|---|---|---|---|---|
| **Production (µ 2008-'10) kton** | 11.677 | 19.174 | 11.903 | 15.751 | 2.541 | 742 | 1.419* | 95.019 |
| % prod. growth 2001-2010 | 0,68 | 1,53 | 6,53 | 2,34 | 13,79 | 14,11 | | 3,30 |
| **Import(µ 2008-'10) kton** | 836 | 45 | 1 | 767 | 903 | 329 | | 10.687 |
| % Import growth 2001-2010 | 3,01 | 24,30 | 9,04 | 4,71 | -6,75 | 16,18 | | 5,07 |
| **Export (µ 2008-'10) kton** | 950 | 3.339 | 3.547 | 460 | 9 | 15 | 398* | 10.565 |
| % export growth 2001-2010 | -1,23 | 3,32 | 10,84 | -3,03 | 8,50 | 19,27 | | 4,67 |
| **Consumption (µ 2008-'10) kton** | 11.570 | 15.885 | 8.357 | 16.057 | 3.435 | 1.056 | | 95.156 |
| **Consumption per head kg** | 20,5 | 44,4 | 38,0 | 10,5 | 21,5 | 20,3 | 15* | 12,3 |
| % growth per head 2001-2010 | 0,65 | 0,26 | 3,98 | 1,96 | 6,45 | 15,22 | | 2,14 |

µ= average

Source: OECD - * Thai industry data, 2011

**References:**


- La situation mondiale de l'alimentation et de l'agriculture, FAO, 2009
- Prospects for agricultural markets and income 2010-2020, DG AGRI, 2011
- Global Agriculture towards 2050, FAO, Rome, October 2009
- http://www.blackseagrain.net/photo/brazil-is-the-world2019s-leading-chicken-exporter-in-2011
- Westhoek, H. et al. (2011), The Protein Puzzle, The Hague: PBL Netherlands Environmental Assessment Agency
- Van Horne P.L.M., Achterbosch T.J. 2008, Animal welfare in poultry production systems, impact of European Union standards on world trade, LEI/WUR, 2008 http://www.europarl.europa.eu/activities/committees/studies/searchPerform.do
- Press release, EPP Group Press and Communications Service, 22.06.2011
- http://epp.eurostat.ec.europa.eu
- http://www.oecd.org/document/0,3746,en_2649_201185_46462759_1_1_1_1,00.html
- http://www.agri-outlook.org/dataoecd/2/36/48184304.pdf
- International Poultry Production - Vol. 19, No4, 2011

# ANIMAL WELFARE AND HEALTH

**New Community Action Plan on the Protection and Welfare of Animals 2011-2015**
The Commission's preparation of the new animal action plan continues. The Parliament concluded in March 2010 its report to the Commission and made recommendations for the action plan 2011-2015.

In 2009, the Commission sponsored research project Welfare Quality research project delivered a first report on animal welfare assessment parameters and suggested welfare quality principles: good housing, good feeding, good health and appropriate behavior. Based on the report European Food Safety Authority (EFSA) gave itself a mandate for developing guidance on risk assessment for animal welfare (see EFSA below).

The EconWelfare project, like the Welfare Quality project initiated in 2008, has in 2011 collected data on on-farm standards, of-farm standards, consumer trust, education and information enhancement, developing markets and increasing public awareness of animal welfare issues. The aim is to improve animal welfare by creating the necessary public and private legislation and standards.

The Commission is expected to publish a new Community Action Plan for Animal Welfare 2011-2015 in December 2011. **a.v.e.c.** demands that high EU animal welfare standards are equivalent for countries exporting poultry to the EU. So far the World Trade Organisation (WTO) regards animal welfare claims as technical barriers to trade.

**Minimum rules for protection of chickens kept for meat production.** The Directive 43/2007 entered into force on June 30, 2010 and sets rules for maximum stocking density, feeding and drinking facilities, ventilation, heating, light, litter, noise, record keeping, training and surgical interventions.

**a.v.e.c.** has collected information from its members on the implementation by Member States. Most Member States seem to follow the content. The Commission will also collect data in 2012 on the implementation by Member States and is expected to publish a report in 2012 on the results. **a.v.e.c.** keeps fighting for a harmonized approach which is needed to avoid internal market distortions.

**Protection of animals during transport**
The Regulation 1/2005 is currently under revision. It covers transport of animals including poultry. **a.v.e.c.** stays in touch with the Commission on the issues at stake for the poultry industry. Harmonised standards should apply in all Member States. In connection with the revision EFSA has published a report (see EFSA below).

Many issues are critical for **a.v.e.c.**'s members. **a.v.e.c.** has sent its comments to DG SANCO on necessary crate sizes for day old chicks, broilers and turkey. Too much space in crates increases injuries and compromises animal welfare. Uploading and unloading times should not be included in the total transport times. **a.v.e.c.** intends to deliver a position with the participation of other interested stakeholders to the EFSA report.

The Commission is expected to present a communication to the Council and European Parliament possibly with legal proposals to review the Regulation by the 2nd half of 2011. **a.v.e.c.** will closely follow the developments.

**EFSA Animal welfare activities 2011**
A consultation was held by EFSA's Animal Health and Welfare (AHAW) committee on the guidance on assessing animal welfare in May 2011. **a.v.e.c.** made joint comments to the EFSA guidance with EFFAB, EPB, AEH and the PVSG in June 2011 stating that EFSA's opinions in general are biased and lack the input from the industries who continuously gather experience from practice and suggesting that EFSA includes representatives from the industry in its panels, working groups and projects.

**EFSA's scientific report concerning the welfare of animals during transport**

The report published in January 2011 is the third in the series on animal welfare (housing management and animal welfare at time of killing). The report is critical on a number of poultry issues especially heat stress and fitness of the birds for transport. For **a.v.e.c.** especially changes in size of crates for day old chicks and turkeys larger than 15 kilos and the maintaining of current transport time and vehicle conditions of poultry and day old chicks are vital.

EFSA published in July 2010 its report on welfare aspects of housing management and the Commission will use it for its report to be published end of 2012 including comments on the first experience with the implementation of the Directive 2007/43.

**ANIMAL HEALTH - Community Animal Health Strategy 2007-2013**

The Commission's preparation of the new animal health law continues. It redefines the interfaces of animal health legislation with the current legal framework on animal welfare and nutrition, food safety, veterinary medicinal products, CAP and international trade rules.

This year's Veterinary Week "Crisis Management in the Food Chain" in May 2011 highlighted impacts, management, perspectives and communication in the food chain. The conference coincided with the first E. coli outbreak in Germany and the Commission was criticized by professional journalists for its late communication response to the crisis.

June 2011 DG SANCO made recommendations on the cost sharing schemes with a view to harmonise the EU framework for costs and responsibility sharing for animal diseases. The report recommends harmonization of the EU reimbursement rate, risk based compensation and shared public private responsibility. A legislative proposal is expected in 2011.

**Compartmentalisation**

**a.v.e.c.** and EPB have been involved in the drafting of the Regulation (EC) 616/2009 implementing Directive 2005/94/EC on approval of poultry compartments. 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. Today it seems that the implementation by instalment of compartments is delayed for lack of sufficient interest and capacity in both public and private sector with some exceptions.

**Animal cloning - a new legislative proposal?**

The proposal for a Regulation of the European Parliament and the Council on novel foods - 2008/002 (COD) includes foods derived from plants and animals produced by non-traditional breeding techniques as cloning.

The latest EFSA update from September 2010 concludes that not enough information is available for an assessment of food safety and animal health and welfare aspects. Cloning is not used in the poultry sector but **a.v.e.c.** argues that the option should be kept open for future use in the poultry breeding and has made a joint position with EPB and EFFAB on cloning to the Commission in 2010.

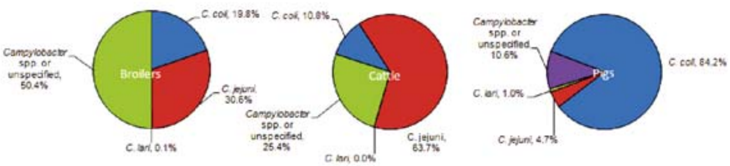
A conciliation on novel foods proposal failed after more than three years of negotiations as the European Parliament was unable to compromise on its request for mandatory labelling for food derived from offspring of cloned animals irrespective of the technical feasibility and the practical implications of such mandatory labelling. In the absence of an agreement, the EU stays with the status quo. The Commission has promised a new proposal soon.

The EU poultry industry cares for the health of consumers as well as that of its poultry. Salmonella levels are decreasing and our industry is committed to fight the challenges of Campylobacter and to find the best solutions for using reformatory medicines in a prudent and responsible way.

**Salmonella criteria for poultry meat**

The proposal of the Commission has been adopted by the SCoFCAH and is expected to come into force in December 2011. From then Salmonella enteritidis and Salmonella typhimurium must be absent in sample of 25g. Poultry meat Salmonella serotyping at farm level is required and introduced for the handling of those flocks in the slaughterhouse. The food business operator is responsible for the risk assessment and risk management but with regard to the control of Salmonella an agreement with the supervising competent authority is crucial.

Species distribution of positive samples isolated from broilers, cattle and pigs, 2009




Source: EFSA, 2011

**EFSA and ECDC zoonoses report.**

The European Food Safety Authority (EFSA) and the European Centre for Disease Prevention and Control (ECDC) have published their annual report on zoonosis and food-borne outbreaks in the EU for 2009. The report shows Salmonella cases in humans fell by 17% in 2009, marking a decrease for the fifth consecutive year. The report also shows that between 2008 and 2009 the number of laying hen flocks infected with Salmonella fell by 9%.

**Campylobacteriosis** remained the most reported zoonotic disease in humans, showing a slight increase with 198.252 cases in 2009 compared to 190.566 in 2008 (+4%). In foodstuffs, Campylobacter, which can cause diarrhoea and fever, was mostly found in raw poultry meat and in live animals.

**EFSA's advice on reduction of Campylobacter in chickens**

In the report published in April 2011 EFSA evaluates the risks of Campylobacter and suggests measures to be taken at farm and slaughterhouse level and during transport. EFSA's suggestions for interventions like irradiation, freezing and chemical treatment of the meat are not realistic options since they are not complying with consumer demands for fresh poultry meat. **a.v.e.c.** disagrees with the use of chemical substances in the process but could embrace use of an organic substance if the consumers agree to this. **a.v.e.c.** can advocate a reduction of Campylobacter but not a zero tolerance which may only be possible to obtain using methods like irradiation.

To ensure the safety of food, consumers also have an important role to play. The core messages in the 'Five Keys To Safer Food Manual' of the World Health Organization's (WHO) are (1) keep clean; (2) separate raw and cooked; (3) cook thoroughly; (4) keep food at safe temperatures; and (5) use safe water and raw materials

**AMR - antimicrobial resistance**

In March 2011 **a.v.e.c.** delivered input to the consultation of European Medicine Agency (EMA) on antimicrobial resistance. April 2011 the Parliament called for tougher controls on the use of antibiotics in animal production. **a.v.e.c.** is committed to a responsible use of antimicrobials in the animal production and asks for a harmonization of the EU monitoring of the use. The possible conflicts between the prescription and administration of medicines should be clarified. Once initiatives become legislation third countries exporting to the EU must comply with the same measures.

In November 2009 the US and the EU established a transatlantic taskforce on AMR. EPB and **a.v.e.c.** replied in December 2010 to a consultation on the content of the taskforce to the Commission. The results and suggestions of TATFAR for future cooperation will be presented in an US EU summit in fall 2011. The political leaders shall decide if the cooperation continues.

**Antimicrobial treatment (AMT) or Pathogen reducing treatment (PRT)**

Two dossiers have been submitted to BIOHAZ/EFSA for substance evaluation. One dossier concerns beef carcass and one poultry carcass decontamination.

**a.v.e.c.** closely follows the WTO notified dispute between the US and the EU on the EU restriction to imports of US poultry meat treated with pathogen reducing chemicals - mainly chlorine based. No new developments have taken place this year and the arbiters in the panel have not been nominated yet.

**Revision of the hygiene package**

The "Hygiene" **Regulations 852/2004 - 853/2004 - 854/2004 hygiene and controls of food of animal origin** in force from 2006 lay down rules for the food chain "from stable to table" that is food safety throughout the food chain starting with primary production. Currently the issues under revision concerning **a.v.e.c.** deal with the definition of MSM, meat preparations and meat products and "fresh" and "frozen". **a.v.e.c.** organised a workshop in 2011 on food safety issues and has given its comments to the Commission on the issues mentioned. An impact assessment of possible amendments is on-going.

**Mechanically Separated Meat (MSM)**

**a.v.e.c.** has followed the Histalim project to develop a methodology to assess the meat destruction index of MSM. The methodology has been assessed and approved by Association Française de Normalisation (AFNOR) and European Committee for Standardization (CEN). **a.v.e.c.** is strongly urging the Commission to agree to an objective and acceptable tool to differentiate between the different types of meat obtained and that the technological progress in the industry is acknowledged.

**Modernisation of Meat Inspection**

Based on the experience of applying the Hygiene Regulations 852/853 and 854/2004 the Commission aims to modernise the meat inspection in EU slaughterhouses by developing a risk-based approach for considering specific hazards or production systems. Food safety is not ensured by visual inspection of the poultry meat alone. Risk assessment and management must be supplemented by microbiological testing of the meat. **a.v.e.c.** is of the opinion that meat inspection should act to minimise the actual risk, not continue to pursue outdated requirements. The Food Business Operator (FBO) has the responsibility and should demonstrate that he is controlling efficiently the food safety and is respecting the rules with regard to animal health and welfare.

**The categorization of hatchery by-products**

Following Regulation 1069/2009 laying down health rules as regards animal by-products and derived products not intended for human consumption some of the hatchery by-products moved from category 3 into category 2 including 'dead in shell poultry'.

The Commission has requested EFSA for an opinion about a Dutch study which concluded based upon a risk assessment that these by-products could be classified under category 3. A critical scientific opinion of EFSA was published in July 2011.

**Reintroduction of Processed Animal Protein (PAP)**

The Commission has presented a communication (SANCO/10843/2011) outlining the reintroduction of the use of PAP and amending Regulation 999/2001 laying down rules for the prevention, control and eradication of certain transmissible spongiform encephalopathies. Dedicated processes respecting the intra species recycling are available and **a.v.e.c.** is pleased that the Parliament has endorsed the proposal of the Commission. The proposal confirms the safety, feed value and environmental importance of processed animal protein (PAP). **a.v.e.c** hopes that the proposal can enter into force in 2012. The ban on feeding animal proteins to ruminants remains in place as does the ban on intra-species recycling.

**Community Guide: "Principles to manage Salmonella control in feed"**

According to Article 5(3) of Regulation 183/2005 feed business operators shall comply with specific microbiological criteria and take measures or adopt procedures necessary to meet specific targets with the view to minimize Salmonella in feed. All Salmonella serotypes in feed are targeted and all operators in the feed (supply) chain are included. **a.v.e.c.** has commented on the guide drafted by FEFAC, FEDIOL, COCERAL and COPA-COGECA that Salmonella criteria must apply for all species and that targets, sampling schemes and critical feed material should be covered as well as on farm mixing. Transport is critical and dedicated feed transports may be appropriate.

**Adventitious presence of GM material in feed**

After more than two years of discussion, the Member States have accepted the proposal of the Commission (SANCO 13368/2010) to harmonise the validation detection methods which include accepting an adventitious presence of non-authorised GM material up to 0,1% in feed ingredients end of June 2011. The proposal is limited to GM feed material authorised for commercialisation in a 3rd country and for which EFSA authorisation is pending for more than 3 months in the EU. **a.v.e.c.** welcomes the proposal together with other stakeholders although the next questions following the proposal is to the threshold levels for food?

# MARKETING STANDARDS – LABELING OF POULTRYMEAT

Regulation 543/2008 implements the marketing standards for poultry as laid down in Regulation 1234/2007. For **a.v.e.c.** the following issues are important: interpretation of "meat product" and "meat preparation", the chilling method and water content and the definition of different cuts, especially breast fillet. **a.v.e.c.** is encouraging the Commission to draft the appropriate amendments for the Regulation 543/2008 but also amendments of the Regulation 1234/2007 might be needed, where the Commission is lacking the legal competence to implement today.

The interpretation of "meat product/meat preparation" according to the marketing standards is connected to the definitions in the Hygiene Regulation 853/2004 annex I. The Commission has presented for discussion a first reflection paper about the definitions and the categorization of different products, i.e. meat preparations and processed products. **a.v.e.c.** has explained to the Commission that the crucial criterion to distinguish between a meat product and a meat preparation is whether the cut surface shows that the product no longer or still has the characteristics of fresh meat. A "meat preparation" has undergone a process that is insufficient to modify the internal muscle fibre structure of the meat and should for this reason be cooked before consumption whereas a "meat product" is a product that is fully cooked and ready to eat. Misunderstandings that risk harming consumer health should be avoided.

The Commission has launched an evaluation of the allowed maximum water/protein ratio in poultry cuts with respect to the technically unavoidable water uptake during the cooling process since this might have been changed due to genetically and or physiological changes in broilers. **a.v.e.c.** has recommended to the Commission to include in the study the possible consequences of the outcome of the evaluation for the analytical protocol to determine chicken or added water content and collagen-based proteins in chicken breast products as laid down in Commission Recommendation 2005/175/EC.
**a.v.e.c.** is discussing whether immersion chilled poultry should be mandatorily frozen and labelled before it is presented to consumers.

**Food information to consumers**
The proposal COM (2008) 40 combines existing rules on food labelling and nutritional information into one Regulation and contains both mandatory and voluntary labelling. The second version based on the Council's document from February was endorsed by the Parliament in July. Depending on the Commission's and Council's final approval the Regulation can be published in October 2011.

**a.v.e.c.** has contacted the Commission, the Parliament and the COREPER with its position: "Mandatory labelling indicating the place of farming by mentioning EU mandatory followed by the name of the Member State or mandatorily mentioning non EU followed by the name of the country". However, both the Parliament and the Council agree that "origin labelling or place of provenance" should be compulsory for fresh meat including poultry meat. Furthermore it is mandatory to label fat, saturates, salt, protein and carbohydrates content on the back of the pack.

Extension of the mandatory origin labelling for meats used in processed foods will be subject to implementing rules following an impact assessment by the Commission within 2 years. Furthermore it is suggested that minimum durability or use by date should also be accompanied by date of first freezing, if frozen more than once. The indication of stunning method is not included in the Parliament document but a study may be considered. Finally water content must be labelled in case of uncooked cured meat in the case of added water making up more than 10% of the weight. **a.v.e.c.** will closely follow the next steps.

**Labelling of animal welfare**
**a.v.e.c.** has actively promoted an "EU farming label". Such a label indicates that the EU is one market and that the same legislation ensures consumers the highest poultry meat and food safety standards.

Consumers are more and more concerned about the welfare of animals for food production. This perception is not always reflected in rational buying behaviour.

Many different labelling schemes exist and a harmonised, consistent approach is needed. The Parliament has called on the Commission to publish at the latest in 2012 a proposal for general animal welfare legislation. During its plenary in July 2011 Commissioner Dalli promised the Parliament to work on a legislative proposal which may introduce mandatory labelling of the stunning method. The Commission is expected to publish its animal welfare action plan 2011 - 2015 with some delay in December 2011. At WTO level no progress has been made on the labelling of animal welfare.

**Agricultural Product Quality**

The Commission published its legislative proposal COM (2010) 7333 including the recommendation to maintain the Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) schemes in December 2010. In 2010 it was suggested to merge the schemes but this has been abandoned based on input from a consultation held in 2010. Furthermore quantitative restrictions required by the producers have not been included. Third countries may register PDO or PGI as well. The proposal includes labelling of origin in the current marketing standards. Some overlap could occur since the "Food information to consumers" as it stands today suggests country of origin or place of provenance.

The Commission continues to promote the small scale production during trade missions. **a.v.e.c.** has reminded the Commission that the conventional production represents 95% of the EU poultry meat production and feeds the majority of EU citizens. Therefore promotion of European conventional production should get fair, non-discriminating attention.

**More information:**

http://ec.europa.eu/food/animal/diseases/strategy/framework_en.htm
http://www.efsa.europa.eu/en/consultations/call/ahaw110504.htm
http://ec.europa.eu/dgs/health_consumer/information_sources/crisis_management_food_chain_en.htm
http://ecdc.europa.eu/en/publications/Publications/1011_SUR_Annual_Epidemiological_Report_on_Communicable_Diseases_in_Europe.pdf#page=177
http://ecdc.europa.eu/en/activities/diseaseprogrammes/TATFAR/Pages/index.aspx
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008PC0040:EN:NOT
http://ec.europa.eu/food/food/biosafety/antimicrobial_resistance/index_en.htm
http://www.efsa.europa.eu/en/supporting/pub/132e.htm
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=199527
http://www.efsa.europa.eu/en/efsajournal/pub/2017.htm
http://ec.europa.eu/food/food/biosafety/animalbyproducts/ABP_r1.pdf
http://ec.europa.eu/food/animal/welfare/farm/docs/options_animal_welfare_labelling_report_en.pdf
http://www.europarl.europa.eu/sides/getDoc.do?type=REPORT&reference=A7-2011-0170&language=EN&mode=XML

**Market situation: turkeys**

European production of turkeys remains rather stable at 1.8 million tons since the crisis of avian influenza in 2006. However, the picture is different across countries: production growth is mainly recorded in Germany and Poland, while France, Italy and the United Kingdom are struggling to stabilize their production levels.

The sharp price increase of agricultural raw materials is taking place in a difficult economic situation. In addition higher feed conversion rates prevail. The turkey industry must prioritize minimization of the cost price.

Production costs are volatile. Volatility of consumption patterns are difficult to manage. Even apart from food scares the consumer today is very price sensitive. Increases in retail prices make the consumer reconsider his total purchase. Given the price position of turkey meat it should however be able to maintain its current level of consumption.

Import from third countries is a real challenge to the EU production because it impacts on the balance of the market. These imports are playing an important role in the supply of the processing industries. This demonstrates that the European turkey industry is burdened by the requirements of European regulation on the protection of the environment and animal welfare. These additional costs cannot be recovered by the European producers and have not been incorporated by imported products.

**Reduction of the prevalence of Salmonella enteritidis and Salmonella typhimurium**

Regulation (EC) 584/2008 of 20 June 2008 establishes the Community objective of reducing the prevalence of Salmonella enteritidis and Salmonella typhimurium in turkeys. The maximum percentage of meat turkey flocks positive with respect to these two serotypes must be reduced to less than or equal to 1% by 31 December 2012.

The European industry has evidence for prevalence rates today. The European Commission has nevertheless decided to establish the absence of Salmonella enteritidis and Salmonella typhimurium in 25g of turkey despite the possible progress obtained during the transitional period until December 31, 2012.

The tightening of the regulations comes as the EU welcomes the continued decline in the number of human cases registered and it assigns that result to the effectiveness of the global approach.

**Turkey welfare**

Apart from the regulations on the protection of animals during transport and at the time of killing, the turkey sector is paying attention to the welfare of turkeys during rearing. Foot pad dermatitis (FPD) is considered as a welfare indicator in broilers but it may be questioned whether it could be a tool for monitoring turkey welfare. The natural character of turkey production is different from chickens in that they do not turn the litter, like broilers. From literature and experience in practice it is clear that the cause of FPD is multi-factorial (contact between foot pad and litter/ excreta, growing conditions, genetic variation and nutrition). A comprehensive study is required to the solutions to reduce the incidence and severity of FPD in turkeys for sustainable turkey production in Europe.

A consortium of research institutes and small and medium enterprises and their associations have submitted a project for European funding to gain more scientific knowledge on the development and causative factors of FPD in commercial turkeys and on the relationship between FPD and health, welfare and performance.

# TRADE NEGOTIATIONS 2010-2011

The EU standards for poultrymeat are of the highest in the world and this contributes to a higher cost level compared to that of imported poultry. Since global competition should take place at a level playing field, **a.v.e.c.** is promoting during discussions with DG Trade that imported poultrymeat complies with the standards the European Union is imposing on farmers and other food business operators in the EU. This should be a condition *sine qua non* when EU is negotiating and concluding agreements.

Today many bilateral trade negotiations are on-going or to be launched soon and many trade partners are interested in bringing poultry meat to the EU.

The single pocket approach of WTO and bilateral agreements should apply to all bilateral quota and not only on EU-MERCOSUR trade agreement. If not, the possible qualification of being sensitive will be meaningless.

**a.v.e.c.** considers that import quotas should be allocated to certain tariff lines instead of granting quotas in general leaving it to the traders, importers and exporters, decision or choice which means that it will be used for boneless (breast) meat only. **a.v.e.c.** advocates for the allocation of the following tariff rates quotas (TRQ): 30% to whole carcass, 35% boneless meat and 35% cuts with bone. This will create a better balance for European producers.

**WTO - DOHA at a standstill**

World Trade Organization (WTO) members have little time left to rescue the 10-year old Doha trade talks and solve the fight over manufacturing trade between the United States and major emerging economies like China, India and Brazil before they meet for discussions. Despite fatigue and pessimism the EU is committed to the importance of bringing the Doha Development Round (DDR) to a conclusion.

The negotiations in WTO are in a very critical stage due to a stalemate in NAMA, especially in chemicals, machinery and electronics. The multilateral agreement is still the main focus of the EU.

Regarding the GATT, Art. 28, discussions with Brazil and Thailand on harmonisation of the import duties for poultry falling in CN code 1602 are expected to be concluded by an agreement in 2011. Since the start of the negotiations with Brazil and Thailand in 2009 the imports of prepared or preserved meat containing ≥25% but > 57% poultrymeat have grown by about 20% in 2010 which will likely result into higher compensating import quota.

**WTO dispute settlements - US-China poultry dispute**

At its meeting on 25 October 2010, the Dispute Settlement Body (DSB) adopted the panel report on the US-China poultry dispute. China was of the view that certain provisions in annual appropriations measures of the US Congress may still affect China's ability to access the US poultry market in the future and thus hoped that the US would take positive steps to eliminate all discriminatory measures against Chinese poultry products. Speaking as a third-party in the dispute, the EU welcomed the panel's findings but questioned the manner in which the panel had reached its conclusion.

**a.v.e.c.** has followed the discussions regarding the EU's restriction on imports of U.S. poultry treated with PRTs - pathogen reduction treatments (chlorine) but in the last year no further actions were registered. Meanwhile dossiers on the use of PRT substances for both beef and poultry have been submitted to EFSA for a scientific opinion.

**REGIONAL AND BILATERAL TRADE REGIONS AND NEGOTIATIONS ANDEAN (COLOMBIA, PERU) and CENTRAL AMERICA**

Peru has a population of about 30 million people and the annual production of chicken meat is about 800.000 tons. Peru succeeded

to get included in the agreement a quota for poultry meat of 7.500 tons/year + 10% every year without any reference to the application of EU standards. Since it will likely be used for boneless meat only it will represent a production of about 45.000 tons live chickens.
In the trade negotiations with Central America poultry has been excluded.

## MERCOSUR

The EU-Mercosur agreement discussions are ongoing. DG AGRI officials have previously indicated that market access offers are unlikely to be tabled until after the Argentinian presidential elections on 23 October 2011. No offers have been exchanged after the relaunch and no timing has been settled mainly because MERCOSUR is not ready to offer any access to their non agricultural markets. The EU has prepared an impact assessment of possible offers but it is only an internal document so far.

The situation has changed since 2004 which justifies a revision of the latest offers from 2004 when the EU offered a quota at reduced duty of 75.000 tons poultry meat and MERCOSUR demanded a quota of 250.000 tons and full liberalisation of trade of processed products.

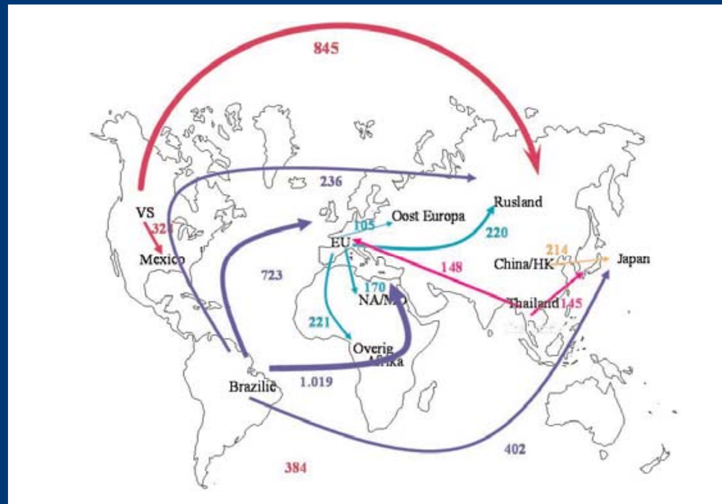
## ASEAN AND ASEM and bilateral talks

### China

Since the opening of the EU market in December 2008 for cooked poultry meat from China, the share of China in the imported duck meat has tremendously increased from 25% in 2009 to 40% in 2010. China is asking for more access to EU markets for both more regions and maybe unprocessed poultrymeat. The Food and Veterinary Office (FVO) inspection is planned for October 2011.
The Commission has noted an offensive approach from China during a meeting in May 2011. So far only two regions can export to EU.

### Korea

The European Parliament gave its approval to the EU-Korea FTA that entered into force July 1st 2011. It is the most comprehensive FTA negotiated by the EU. Now it comes to the implementation.




***Broilermeat: Brazil, USA, Thailand***
*Source: PVE/gira*

### Singapore

The FTA negotiations with Singapore have been launched and are expected to be finalised by the end of 2011. This is the first agreement that might be signed with an ASEAN country. The discussions will be finalised by the end of the year and the result is expected to be a precursor for the discussions to start with Vietnam and Thailand on bilateral agreements. The "EU as place of origin" is not recognised yet although sustained efforts are made by the EU officials.

### India

Concluding an ambitious and balanced agreement with India is important in terms of economic value but also with strategic significance. Although the Indian market does not have the needed infrastructure for meat imports India seems extremely interested in exporting poultry to the EU market. Exchange of offers is scheduled for September 2011. EU and India didn't agree on the inclusion of a chapter on sustainability.

**Thailand**

The FVO inspection on poultry health has been published and the Commission is considering whether reopening the European market for uncooked meat from Thailand could be justified. This would mean that Thailand may use its quota of 92.610 tons for salted poultrymeat.

EU has already engaged in preparatory talks for a bilateral trade agreement. The scoping discussion has started in June and probably in autumn the results of it will be exchanged. The negotiations for a FTA are expected to start in 2012.

**Malaysia**

FTA negotiations have been launched by the EU this year. Presently due to the veterinary issues or religious slaughter standards Malaysian poultry imports from Europe are being disturbed. Malaysia imports about 30.000 tons/year from Europe (DK, FR). The EU has defensive interests in Malaysia but Malaysia is reluctant to increase their import quantities and is currently questioning the EU slaughter standards for halal.

**Indonesia**

A scoping exercise for a FTA is in progress. The market is extremely interesting for the EU as Indonesia is not self-sufficient. Indonesia has specific requirements regarding the slaughtering procedures (halal) which may complicate exports from the EU. Australia and USA are the main countries supplying poultry to Indonesia.

**Vietnam**

The scoping exercise has been started and it is expected to be concluded by 2012 but many chapters like agriculture including meat are closed from the beginning. **a.v.e.c.** follows the advance of the discussions closely.

**Japan**

Both parts have committed themselves to move forward into free trade talks during the last EU-Japan Summit this spring. Copa-Cogeca, Celcaa and Ciaa have agreed to work together to encourage the Commission to launch an ambitious FTA. Japan may be interesting for European poultry industry but firm competition with Brazil, already exporting to Japan, is to be expected.

## OTHER BILATERAL NEGOTIATIONS

**Canada**

Progress has been made in the Comprehensive Economic and Trade Agreement (CETA). European Parliamentarians warned the Commission about possible "substantial concessions" on dairy, origin labels and GMOs. The agricultural offer will be exchanged only when the services offer will be ready also. The EU was ambitious regarding some sectors like poultry where it has asked for the full liberalisation. Unfortunately this was not accepted by the Canadian Regional Provinces. Poultry and dairy is a political highly sensitive topic in the negotiations.

**Russian Federation**

In the context of its accession to the WTO a general agreement has to be reached with Russia on resolving outstanding bilateral issues in the veterinary, sanitary and phytosanitary field. Thereafter the European Commission has to agree with the Russian Federation on the specific matters. Since the Russian Federation is in a Customs Union with Kazachstan and Belarus the situation has become more complicated. For the time being we have to manage the veterinary issue according to the memorandum of understanding and the veterinary certificate from 2006 agreed between the Commission and Russia.

**Ukraine**

After encountering some difficulties, FTA negotiations are back on track and there is hope that the discussions might be finalised soon. The EU will not accept export duties and state aid. It is evident that Ukraine has a strong offensive interest in poultrymeat and that they are overdemanding. **a.v.e.c.** stresses that the same standards will be imposed for poultrymeat from the Ukraine as are imposed on European poultry since Ukraine lacks of any specific requirements regarding cages, welfare standards etc.

### Morocco

The bilateral negotiations on the liberalisation of trade in services and establishment continue. EU has offered Morocco a quota for European poultrymeat of 3.500 tons and Morocco has proposed that poultry to be slaughtered according to 'ritual halal slaughter' procedures. **a.v.e.c.** has indicated that it should become clear that stunning before slaughter should be accepted. If stunning would not be accepted, it will create a big obstacle to trade of poultrymeat to Morocco.

### Trade box

- Huge imports of poultry meat in the EU, mainly from Brazil and Thailand (imported volume of estimated 800.000 tons amounts at about 30% of EU production of chicken breast fillet).
- The value of exports is much lower (1,07 /100kg) than the value of imported poultrymeat (2,10 /100kg).
- Exports consist mainly of whole chickens, cuts with bone (legs and leg quarters) and cuts without bone (Mechanically Separated Meat). Imports consist of mainly (un)processed boneless breast meat.
- Brazilian poultry meat may not enter the US market.
- USA and Brazil have no substantial imported volumes.
- Between the member countries of the Mercosur Group the poultry trade amounts to zero.
- Importers search for the lowest import duties, harmonisation of tariff duties.

### More information:


- http://www.euractiv.com/en/trade/wto-faces-tough-choices-latest-doha-setback-news-504260?utm_source=EurActiv+Newsletter&utm_campaign=adc410f31d-my_google_analytics_key&utm_medium=email
- http://www.wto.org/english/tratop_e/dispu_e/cases_e/ds392_e.htm
- AgraFacts 51-11, Brazilian officials dismiss EU's Mercosur fears, 2011
- http://trade.ec.europa.eu/civilsoc/doclist.cfm
- http://www.agra-net.com
- http://www.fas.usda.gov/gainfiles/200903/146327402.doc
- 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
- http://www.wto.org/english/tratop_e/dispu_e/cases_e/ds389_e.htm
- http://www.wto.org/english/tratop_e/tpr_e/tp348_e.htm

# PERSPECTIVES ON POULTRY WORLD MARKETS (2011-2020)

**The global agricultural projections for 2010-2020**
According to the projections of OECD-FAO, agricultural production is expected to increase in the short term, assuming normal weather, as a result of an expected supply response to current high prices. Commodity prices should fall from the highs of early 2011, but in real terms are projected to average up to 20% higher for cereals (maize) and up to 30% for meats (poultry), over the 2011-2020 period compared to the last decade.

**Global meat consumption**
Presently, around 16% of global meat consumption takes place in the EU-27. The global demand for proteins from animal products is projected to increase by more than 50% by 2030, compared to that of 2000, due to population growth and increasing wealth especially in developing countries. The trend is expected to continue but will be influenced by environmental, economic and political developments.

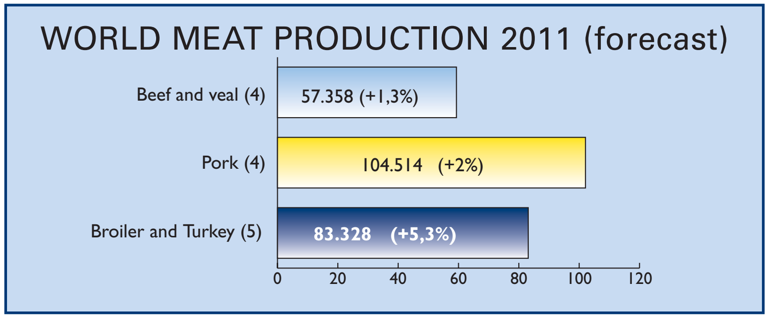
**Market situation for meat**
The meat sector is adjusting to the supply and demand imbalances in the feed sector of the past three years. Faced with high production costs, restricted access to credit, high energy costs the supply of poultry meat responded more quickly to the higher demand, and as a result, prices recovered gradually.

Nominal prices for poultry are expected to be 16% higher by 2020 compared to the base period 2008-2010. In real terms, all meat prices are expected to remain firm and on a higher plateau for the 2010-2020 period as to compensate the higher feed and energy costs.

**World meat prices for poultry per period and country**

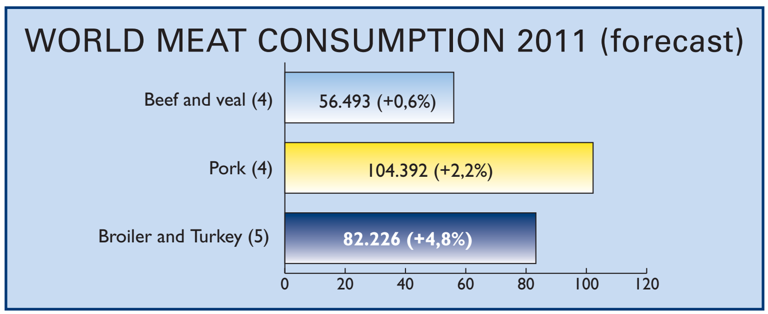
| Period/Country | | Avg 2008-2010 | 2011 | 2020 |
|---|---|---|---|---|
| **EU-27** | USD/t pw(1) | 2.456 | 2.640 | 2.614 |
| **Brazil** | USD/t rtc(2) | 1.090 | 1.261 | 1.266 |
| **USA** | USD/t rtc(3) | 1.062 | 1.153 | 1.250 |

**Outlook for global poultrymeat production**
The livestock sectors are expected to maintain a more even development in the period to 2020. The projections confirm the continuation of the gradual shift in agricultural market's share from developed to developing countries. Latin America, the growth engine of recent years, is expected to be joined by Eastern Europe.
Environmental concerns, high input costs, limited additional arable land, on-going policy reforms and reduced competitiveness because of strong currencies keep agricultural sectors especially in the Western part of Europe roughly at their current levels, barely higher than peak production in 2008.




Source : USDA-FAS attaché reports, official statistics, and results of office research, April 2011

**Global poultry meat consumption** on a per capita basis is projected to gain importance over the next ten years, poultry - a relatively inexpensive livestock product is a popular source of protein, especially among poorer populations. Significant per capita consumption growth is projected for large economies in Asia, the Middle East and some Latin American economies. Poultry meat consumption is expected to expand the fastest (14%), reaching parity with pig meat consumption by the end of the projection period.




Source : USDA-FAS attaché reports, official statistics, and results of office research, April 2011
http://www.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf

**Projection highlights for production and trade of meat**

World meat production growth is anticipated to have an annual reduction of 1.8% dampened by higher costs during the period 2011-2020, which compares to the 2.1% annually reduction of the previous decade.

The reduced growth is primarily driven by productivity gains from both larger economies of scale and technical efficiency gains, notably for poultry and pig meat in developing countries.

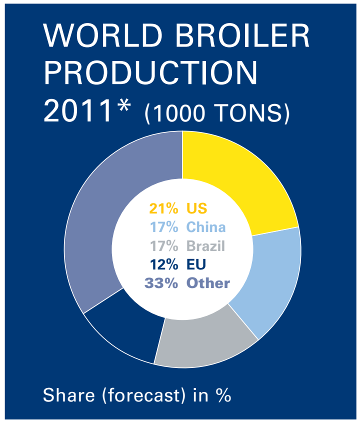
Driven mostly by an expansion of poultry, world meat exports in 2020 are projected to increase annually by 1.7%, in the 2010-2020 period which compares to 4.4% annually in the previous decade.

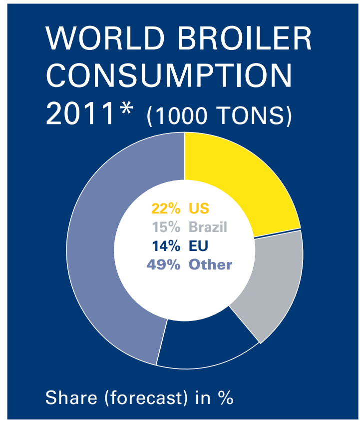
A slowing down rate of trade growth in poultry products is anticipated, from an annual rate of 7.7% in last decade to 2% during the 2010-2020 projection period. US and Brazil, the largest contributors to exported growth, are expected to strengthen their dominance of world trade. During the first period of the projection, their exports will stagnate due to the demand response to high poultry product prices. By 2020, **US and Brazilian** exports will account for nearly half of the additional export supply in world markets.

Growth in **Argentinian exports** to the South American market continuously increases. **Thailand's exports** are also anticipated to expand slightly, mainly for processed products.

Meanwhile the **EU exports** will decline due to the growing domestic demand, a strong euro and animal welfare regulations limiting stocking density.

Imports growth will be led by countries in **Middle East, South Asia and Latin America.** Expansion of **Mexico's** food processing industry is expected to boost the country's import demand due to sustained investment within the processing industry and the continuous need for production material. **Russia** a traditional EU importer will significantly reduce its imports of poultry following higher domestic production and may become a net exporter of poultry meat. In the EU, the decline in exports during the projection period will be accompanied by a sustained, moderate, expansion of imports. As a result, the EU will see a constant deterioration of its terms of trade, with a balanced account by 2020.



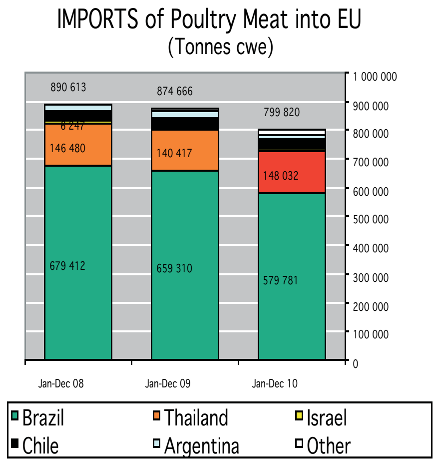

* April 2011 estimates for the statistics available within the USDA data base.
Source: USDA-FAS attaché reports, official statistics, and results of office research, April 2011

**Main issues and uncertainties for EU poultrymeat trade**

- The Russian Federation traditionally an importer of poultry has registered in recent years sustained growth within the Federation to become self-sufficient in poultry meat.
- Will Russia in the future have surplus of production for poultry meat and become a net exporter?
- In North Africa and Middle East, large importers of EU poultry, have the power to impact world meat trade because of the uncertain political context and civil unrest.
- The World Meat Market is fragmented due to animal health and welfare issues, so the architecture of the 2011-2020 projections can change due to improved conditions by new market players.
- Additional consumer concerns related to animal welfare, food quality, production and processing methods may introduce segmentation in the meat trade chain.
- Any outbreak in a major exporting country, such as Australia, Canada, US and Brazil, which could not be regionalised will affect domestic and international markets.

## Processed poultrymeat and origin

In 2010 EU imported almost 800.000 tons of poultry meat of which 75% as salted and processed. According to international custom rules this meat will get 'European origin' after substantial transformation. Therefore **a.v.e.c.** has advocated the mandatory labelling of the place of farming of the poultry from which the meat is coming on all products containing more than 25% poultry meat.



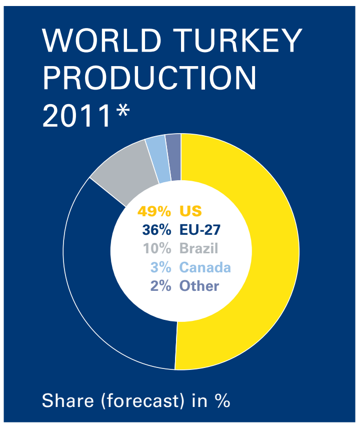

Source: DG AGRI, ManCom March 2011

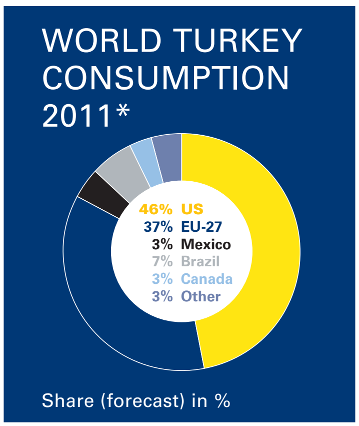
## Trends for global turkey production and consumption

The production of turkey is expected to remain stable compared to 2009 and 2010 estimates.

No significant changes regarding quantities and country shares are expected compared to previous years. EU-27, Brazil and Canada will slightly increase production with 0.58%, 1.11% and 0.31% respectively. US might be the main player which will decrease its production by about 1.66% compared to 2011 estimates.

Consumption will remain stable in line with production flow. The main consumers are basically the same as in the previous year: US, EU-27, Brazil, Mexico and Canada. No major changes are expected according to the forecasts of the consumption of turkey meat.




* October 2011 estimates for the statistics available within the USDA data base.

Source : USDA-FAS attaché reports, official statistics, and results of office research, April 2011

## Turkey meat trade

Mexico will continue to be the main importer of turkey meat with about 150.000 tons forecasted for 2011. Regarding exports, Brazil will continue to be the main exporter with 165.000 tons, similar to the exports from 2010 year. EU-27 will continue to import more than it is exporting.

**2011*** (1.000 tons - ready to cook equivalent)

| | Imports | Exports |
|---|---|---|
| Mexico | 150 | 165 |
| EU-27 | 115 | 105 |
| South Africa | 26 | - |
| China | 25 | - |
| Russia | 10 | - |
| Canada | 8 | 21 |
| US | 5 | 249 |
| **TOTAL** | **339** | **540** |

* October 2011 estimates for the statistics available within the USDA data base.

Source : USDA-FAS attaché reports, official statistics, and results of office research, April 2011

References:


http://www.fao.org/fileadmin/user_upload/animalwelfare/Protein_Puzzle_web_1.pdf

http://www.agri-outlook.org/pages/0,2987,en_36774715_36775671_1_1_1_1_1,00.html

http://www.fas.usda.gov.circular/2011/livestock

http://www.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf

http://www.agri-outlook.org/document/15/0,3746,en_36774715_36775671_48172367_1_1_1_1,00.html

## STATISTICS

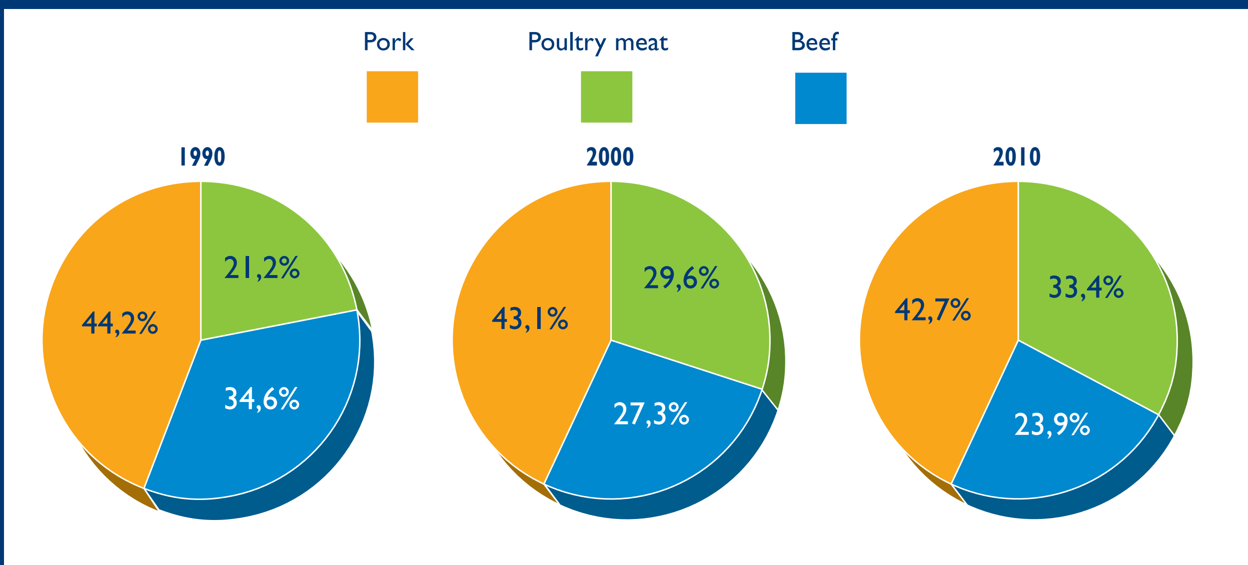
### EU POULTRYMEAT SUPPLY (000' t)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| | **EU-25** | | | **EU-27** | | |
| Gross production | 11.076 | 10.744 | 11.452 | 11.645 | 11.711 | 11.995 |
| Total Exports | 1.240 | 1.240 | 811 | 905 | 928 | 1.148 |
| Total Imports | 640 | 650 | 829 | 864 | 848 | 775 |
| Consumption | 10.550 | 10.250 | 11.469 | 11.604 | 11.630 | 11.622 |
| Consumption per capita, k | 22,9 | 22,1 | 23,2 | 23,4 | 23,3 | 23,2 |
| Rate of self-sufficiency % | 105,0 | 105,0 | 99,9 | 100,4 | 100,8 | 103,3 |

Notes: Partial provisional or estimated.

Source: MEG to EUROSTAT and national statistics, 2011

### CHANGING COMPOSITION OF WORLD MEAT PRODUCTION




Source: USDA, Foreign Agricultural Service; Production, Supply and Distribution (PS&D) database; FAO

## POULTRYMEAT PRODUCTION IN EU (000't)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 114 | 109 | 119 | 119 | 120 | 120 |
| Belgium/Luxembourg | 282 | 278 | 267 | 263 | 268 | 268 |
| Denmark | 207 | 185 | 187 | 191 | 191 | 191 |
| Finland | 87 | 87 | 95 | 101 | 95 | 96 |
| France | 1.918 | 1.793 | 1.862 | 1.851 | 1.817 | 1.850 |
| Germany | 1.197 | 1.185 | 1.273 | 1.391 | 1.460 | 1.588 |
| Greece | 177 | 169 | 106 | 106 | 106 | 106 |
| Ireland | 127 | 121 | 112 | 98 | 95 | 104 |
| Italy | 1.101 | 984 | 1.059 | 1.110 | 1.133 | 1.157 |
| Netherlands | 618 | 617 | 684 | 698 | 727 | 737 |
| Portugal | 296 | 289 | 318 | 321 | 330 | 335 |
| Spain | 1.302 | 1.283 | 1.283 | 1.306 | 1.312 | 1.270 |
| Sweden | 82 | 85 | 87 | 88 | 88 | 88 |
| United Kingdom | 1.581 | 1.535 | 1.460 | 1.458 | 1.452 | 1.568 |
| **EU-15** | **9.089** | **8.720** | **8.912** | **9.101** | **9.194** | **9.478** |
| Cyprus | 33 | 27 | 29 | 29 | 29 | 29 |
| Czech Republic | 226 | 213 | 202 | 196 | 186 | 186 |
| Estonia | 14 | 13 | 12 | 12 | 12 | 12 |
| Hungary | 375 | 386 | 376 | 380 | 383 | 386 |
| Latvia | 17 | 21 | 21 | 23 | 24 | 24 |
| Lithuania | 60 | 66 | 68 | 71 | 71 | 71 |
| Malta | 5 | 4 | 5 | 5 | 5 | 5 |
| Poland | 1.050 | 1.075 | 1.096 | 1.165 | 1.185 | 1.300 |
| Slovenia | 67 | 67 | 66 | 65 | 70 | 68 |
| Slovakia | 88 | 88 | 84 | 78 | 76 | 76 |
| **EU-25** | **11.024** | **10.680** | **10.871** | **11.125** | **11.235** | **11.635** |
| Bulgaria | 99 | 107 | 116 | 106 | 117 | 115 |
| Romania | 320 | 264 | 304 | 304 | 304 | 304 |
| **EU-27** | **11.443** | **11.051** | **11.291** | **11.534** | **11.656** | **12.054** |

Notes: partial provisional or estimated. For EU countries. Some significant differences between national and EUROSTAT data.
Sources: MEG to EUROSTAT, FAO and national data, 2011

## POULTRYMEAT PRODUCTION IN THIRD COUNTRIES ('000 t)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Argentina | 1.053 | 1.202 | 1.204 | 1.204 | 1.204 | . |
| Brazil* | 9.681 | 9.708 | 10.763 | 11.498 | 11.489 | 12.797 |
| Chile | 544 | 614 | 581 | 611 | 615 | . |
| China | 14.055 | 14.286 | 15.039 | 15.815 | 16.438 | 17.050 |
| Croatia | 41 | 39 | 41 | 41 | 38 | . |
| Japan | 1.273 | 1.367 | 1.366 | 1.369 | 1.394 | . |
| Russian Federation | 1.381 | 1.624 | 1.918 | 2.044 | 2.360 | 2.600 |
| Saudi Arabia | 538 | 549 | 560 | 560 | 560 | . |
| Switzerland | 58 | 52 | 60 | 64 | 65 | 69 |
| Thailand | 1.036 | 1.048 | 1.072 | 1.105 | 1.105 | 1.150 |
| Turkey | 953 | 933 | 1.083 | 1.102 | 1.308 | . |
| Ukraine | 497 | 589 | 689 | 794 | 894 | . |
| USA* | 18.539 | 18.680 | 19.089 | 19.574 | 18.677 | 19.300 |
| **World Production** | **79.820** | **81.909** | **86.286** | **89.914** | **91.308** | **94.000** |

Notes: Partly provisional, partly estimated

*Only broiler and turkey meat

Sources: MEG after USDA, FAO and national statistics

## IMPORTS OF EU-COUNTRIES POULTRYMEAT ('000 t)

| | 2000 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|
| **Poultrymeat** [1] | | | | | | | |
| Austria | 36 | 66 | 62 | 70 | 66 | 84 | 98 |
| Belgium/Luxembourg | 129 | 157 | 138 | 140 | 155 | 157 | 166 |
| Denmark | 17 | 39 | 43 | 42 | 47 | 43 | 50 |
| Finland | 3 | 5 | 4 | 4 | 5 | 5 | 5 |
| France | 153 | 207 | 211 | 255 | 276 | 309 | 342 |
| Germany | 386 | 470 | 407 | 457 | 434 | 460 | 446 |
| Greece | 87 | 56 | 48 | 50 | 7 | 65 | 54 |
| Ireland | 56 | 55 | 94 | 52 | 56 | 53 | 52 |
| Italy | 72 | 23 | 18 | 34 | 32 | 37 | 46 |
| Netherlands | 175 | 283 | 280 | 408 | 419 | 396 | 405 |
| Portugal | 14 | 22 | 26 | 28 | 33 | 39 | 37 |
| Spain | 99 | 129 | 109 | 124 | 118 | 119 | 126 |
| Sweden | 14 | 33 | 39 | 35 | 38 | 38 | 40 |
| United Kingdom | 295 | 406 | 381 | 381 | 335 | 339 | 379 |
| **EU-15 3rd countries** | **205** | | **.** | **.** | **.** | **.** | **.** |
| Bulgaria | . | . | 42 | 48 | 58 | 68 | 81 |
| Cyprus | 1 | 2 | 2 | 4 | 5 | 6 | 6 |
| Czech Republic | 18 | 56 | 58 | 53 | 64 | 77 | 78 |
| Estonia | 35 | 15 | 15 | 17 | 17 | 18 | 21 |
| Hungary | 21 | 43 | 31 | 33 | 47 | 45 | 36 |
| Latvia | 18 | 28 | 32 | 29 | 27 | 25 | 26 |
| Lithuania | 10 | 31 | 33 | 34 | 31 | 25 | 20 |
| Malta | 1 | 4 | 5 | 5 | 4 | 5 | 5 |
| Poland | 19 | 82 | 71 | 59 | 35 | 39 | 32 |
| Romania | . | . | 159 | 127 | 118 | 131 | 94 |
| Slovakia | 9 | 32 | 33 | 32 | 38 | 38 | 50 |
| Slovenia | 6 | 7 | 8 | 9 | 11 | 11 | 12 |
| **EU-25 /27 3rd countries** [2] | **.** | **270** | **148** | **214** | **213** | **199** | **165** |
| | | | | | | | |
| **Salted poultry meat** [3] | | | | | | | |
| Germany | 62 | 0 | 30 | 62 | 61 | 52 | 34 |
| Netherlands | 35 | 0 | 40 | 119 | 114 | 137 | 130 |
| United Kingdom | 9 | 0 | 7 | 19 | 24 | 33 | 36 |
| **EU from 3rd countries** [5] | **109** | **3** | **86** | **219** | **204** | **213** | **194** |
| **Preparations of poultry** [4] | | | | | | | |
| **EU from 3rd countries** [5] | **102** | **309** | **338** | **356** | **430** | **432** | **346** |

[1] Without preparations, livers, salted meat and live poultry - 2010 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, 2011*

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

| | 2000 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|
| Austria | 14 | 33 | 34 | 43 | 43 | 49 | 51 |
| Belgium/Luxembourg | 311 | 351 | 374 | 333 | 340 | 373 | 419 |
| Denmark | 124 | 114 | 99 | 104 | 105 | 95 | 106 |
| Finland | 2 | 12 | 14 | 15 | 14 | 13 | 13 |
| France | 736 | 560 | 460 | 477 | 483 | 479 | 504 |
| Germany | 158 | 323 | 323 | 385 | 416 | 402 | 428 |
| Greece | 6 | 11 | 8 | 16 | 16 | 13 | 15 |
| Ireland | 54 | 45 | 46 | 44 | 37 | 39 | 58 |
| Italy | 69 | 127 | 132 | 115 | 122 | 116 | 151 |
| Netherlands | 722 | 605 | 716 | 873 | 886 | 875 | 990 |
| Portugal | 2 | 3 | 5 | 8 | 9 | 9 | 10 |
| Spain | 67 | 72 | 63 | 78 | 97 | 90 | 128 |
| Sweden | 16 | 13 | 38 | 46 | 29 | 30 | 44 |
| United Kingdom | 190 | 304 | 258 | 291 | 278 | 258 | 268 |
| Bulgaria | . | . | 8 | 17 | 12 | 29 | 46 |
| Cyprus | 0 | 0 | 0 | 1 | 1 | 2 | 2 |
| Czech Republic | 9 | 27 | 21 | 22 | 23 | 23 | 26 |
| Estonia | 19 | 3 | 3 | 2 | 4 | 4 | 5 |
| Hungary | 122 | 111 | 91 | 105 | 124 | 130 | 147 |
| Latvia | 0 | 1 | 5 | 3 | 3 | 4 | 7 |
| Lithuania | 1 | 12 | 13 | 17 | 15 | 18 | 24 |
| Malta | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Poland | 49 | 186 | 208 | 235 | 280 | 316 | 401 |
| Romania | . | . | 0 | 2 | 12 | 33 | 59 |
| Slovakia | 4 | 12 | 15 | 15 | 15 | 14 | 33 |
| Slovenia | 2 | 9 | 9 | 13 | 15 | 14 | 17 |
| **EU-25/27 [2)]** | **.** | **889** | **872** | **757** | **857** | **886** | **1.124** |

[1)] Without preparations, livers, salted meat and live poultry
[2)] From 2007 EU 27 - 2010 partly preliminary.

Data in the EUROSTAT trade statistics and trade balance are partial different.
Source: MEG to EUROSTAT and national statistics, 2011

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **Total imports of poultrymeat** | | | | | | |
| Switzerland | 42 | 35 | 41 | 45 | 44 | 44 |
| **Imports of chicken meat** | | | | | | |
| China | 219 | 343 | 482 | 399 | 401 | . |
| Hong Kong [1)] | 222 | 243 | 215 | 236 | 253 | 295 |
| Japan | 748 | 716 | 696 | 737 | 645 | 789 |
| Russian Federation | 1.225 | 1.189 | 1.222 | 1.159 | 913 | 618 |
| Saudi Arabia | 484 | 423 | 470 | 510 | 605 | 678 |
| United Arab. Emirates | 167 | 182 | 238 | 289 | 297 | 288 |
| **Exports of chicken meat** | | | | | | |
| China | 331 | 322 | 358 | 285 | 291 | 379 |
| Brazil | 2.762 | 2.502 | 2.922 | 3.242 | 2.992 | 3.181 |
| Thailand | 240 | 261 | 296 | 383 | 379 | 432 |
| USA | 2.360 | 2.361 | 2.618 | 3.158 | 3.072 | 3.016 |

[1)] Excluding transit goods.
From: MEG to USDA and national data. Partly provisional, partly estimated, 2011

# CONSUMPTION

## PER CAPITA CONSUMPTION OF POULTRYMEAT IN EU (kilos)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 20,2 | 18,7 | 19,8 | 19,3 | 20,1 | 20,4 |
| Belgium/Luxembourg | 18,7 | 17,5 | 18,0 | 18,7 | 18,0 | 17,0 |
| Denmark | 23,5 | 21,7 | 22,5 | 24,0 | 24,4 | 23,8 |
| Finland | 16,2 | 15,6 | 16,5 | 17,0 | 16,6 | 16,7 |
| France | 23,0 | 23,0 | 24,0 | 23,0 | 23,0 | 23,5 |
| Germany | 17,5 | 16,7 | 17,8 | 18,3 | 18,8 | 19,3 |
| Greece | 20,9 | 19,3 | 20,0 | 20,5 | 21,0 | 20,7 |
| Ireland | 33,0 | 34,0 | 32,0 | 32,2 | 31,0 | 30,5 |
| Italy | 17,6 | 15,3 | 17,0 | 17,5 | 18,2 | 18,0 |
| Netherlands | 22,1 | 21,9 | 22,5 | 22,6 | 23,1 | 22,8 |
| Portugal | 29,7 | 29,8 | 31,5 | 32,5 | 34,0 | 34,1 |
| Spain | 32,0 | 31,0 | 30,5 | 30,5 | 30,5 | 30,2 |
| Sweden | 13,0 | 12,8 | 12,5 | 13,0 | 12,8 | 12,0 |
| United Kingdom | 26,6 | 29,8 | 28,0 | 27,7 | 28,0 | 28,7 |
| Bulgaria | . | 18,0 | 19,0 | . | 22,0 | . |
| Czech Republic | 24,9 | 25,7 | 24,0 | 23,8 | 23,9 | 23,5 |
| Cyprus | . | . | . | . | . | . |
| Estonia | 19,0 | 18,0 | 18,0 | 19,0 | 21,0 | . |
| Hungary | 30,0 | 32,0 | 29,0 | 30,0 | 29,0 | 28,9 |
| Latvia | 20,0 | 21,5 | 21,2 | 20,2 | 20,0 | 19,5 |
| Lithuania | 23,4 | 23,8 | 23,3 | 23,3 | 23,0 | 22,2 |
| Malta | . | . | . | . | . | . |
| Poland | 23,4 | 23,7 | 24,0 | 23,5 | 23,1 | 23,7 |
| Romania | 21,0 | 21,0 | 19,0 | 18,0 | 19,0 | . |
| Slovakia | . | 22,0 | 19,0 | 19,0 | 20,0 | 18,9 |
| Slovenia | 25,0 | 23,0 | 26,0 | 27,0 | . | . |
| **EU-25/27[1)]** | **22,9** | **22,1** | **23,2** | **23,4** | **23,3** | **23,2** |
| Switzerland | 12,3 | 14,3 | 15,9 | 17,0 | 16,8 | 17,2 |

[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, 2011

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 68 | 70 | 72 | 75 | 72 | 70 |
| Belgium/Luxembourg | 170 | 180 | 175 | 165 | 180 | 185 |
| Denmark | 160 | 157 | 150 | 145 | 141 | 146 |
| Finland | 102 | 106 | 106 | 105 | 104 | 104 |
| France | 132 | 121 | 119 | 119 | 117 | 117 |
| Germany | 83 | 86 | 87 | 93 | 95 | 101 |
| Greece | 76 | 79 | 82 | 79 | 74 | 80 |
| Ireland | 96 | 95 | 95 | 94 | 100 | 102 |
| Italy | 107 | 110 | 107 | 108 | 108 | 110 |
| Netherlands | 172 | 172 | 186 | 188 | 190 | 196 |
| Portugal | 95 | 92 | 94 | 93 | 92 | 92 |
| Spain | 95 | 96 | 96 | 97 | 97 | 99 |
| Sweden | 78 | 85 | 90 | 85 | 86 | 92 |
| United Kingdom | 90 | 85 | 90 | 95 | 94 | 94 |
| Bulgaria | . | 76 | 79 | . | 78 | . |
| Czech republic | 89 | 86 | 87 | 84 | 80 | 81 |
| Cyprus | 93 | 91 | 84 | . | . | . |
| Estonia | 54 | 53 | 49 | 51 | 52 | . |
| Hungary | 123 | 120 | 128 | 128 | 134 | 136 |
| Latvia | 40 | 45 | 45 | 49 | 52 | 54 |
| Lithuania | 76 | 75 | 78 | 80 | 85 | 90 |
| Malta | . | . | . | . | . | . |
| Poland | 111 | 112 | 112 | 118 | 120 | 125 |
| Romania | 71 | 64 | 74 | 77 | 79 | . |
| Slovakia | 80 | 81 | 79 | 74 | 69 | 71 |
| Slovenia | . | . | . | . | . | . |
| **EU-25/27 1)** | **105** | **105** | **100** | **100** | **101** | **103** |

[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, 2011

# BROILER

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 89 | 84 | 85 | 85 | 90 | 90 |
| Belgium/Luxembourg | 266 | 262 | 254 | 250 | 255 | 255 |
| Denmark | 180 | 163 | 171 | 175 | 175 | 175 |
| Finland | 72 | 75 | 84 | 91 | 86 | 88 |
| France | 986 | 886 | 993 | 1.009 | 1.027 | 1.045 |
| Germany | 741 | 749 | 826 | 883 | 950 | 1.030 |
| Greece | 165 | 150 | 161 | 160 | 160 | 160 |
| Ireland | 95 | 90 | 96 | 91 | 98 | 109 |
| Italy | 666 | 612 | 670 | 713 | 742 | 780 |
| Netherlands | 552 | 547 | 612 | 626 | 655 | 663 |
| Portugal | 226 | 219 | 245 | 251 | 263 | 267 |
| Spain | 1.045 | 1.030 | 1.034 | 1.059 | 1.063 | 1.022 |
| Sweden | 72 | 75 | 78 | 78 | 79 | 79 |
| United Kingdom | 1.333 | 1.290 | 1.261 | 1.267 | 1.268 | 1.379 |
| **EU-15** | **6.487** | **6.232** | **6.570** | **6.738** | **6.911** | **7.142** |
| Bulgaria | 61 | 66 | 82 | 74 | 79 | 77 |
| Czech Republic | 206 | 203 | 195 | 191 | 181 | 181 |
| Cyprus | 33 | 27 | 28 | 28 | 27 | 27 |
| Estonia | 14 | 14 | 14 | 14 | 14 | 14 |
| Hungary | 235 | 215 | 217 | 230 | 245 | 240 |
| Latvia | 17 | 21 | 21 | 23 | 23 | 23 |
| Lithuania | 57 | 61 | 63 | 65 | 66 | 67 |
| Malta | 5 | 4 | 5 | 5 | 5 | 5 |
| Poland | 796 | 824 | 896 | 730 | 1.060 | 1.070 |
| Romania | 309 | 273 | 312 | 316 | 371 | 380 |
| Slovakia | 87 | 86 | 83 | 76 | 75 | 74 |
| Slovenia | 46 | 44 | 43 | 52 | 55 | 57 |
| **EU-27** | **8.353** | **8.069** | **8.529** | **8.541** | **9.111** | **9.356** |
| Argentine | 1.010 | 1.200 | 1.320 | 1.430 | 1.500 | 1.600 |
| Brazil | 9.321 | 9.355 | 10.305 | 11.033 | 11.021 | 12.312 |
| China | 9.964 | 10.350 | 11.291 | 11.840 | 12.100 | 12.550 |
| India | 1.900 | 2.000 | 2.240 | 2.490 | 2.550 | 2.650 |
| Iran | 1.237 | 1.327 | 1.423 | 1.450 | 1.525 | 1.600 |
| Mexico | 2.498 | 2.592 | 2.683 | 2.853 | 2.781 | 2.809 |
| Russian Federation | 900 | 1.180 | 1.410 | 1.680 | 2.060 | 2.310 |
| South Africa | . | 1.113 | 1.159 | 1.240 | 1.250 | 1.290 |
| USA | 16.042 | 16.103 | 16.387 | 16.741 | 16.108 | 16.740 |

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, 2011

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 12,1 | 11,5 | 11,9 | 11,8 | 12,1 | 12,3 |
| France | 11,9 | 12,9 | 13,7 | 12,9 | 12,7 | 13,1 |
| Germany | 9,3 | 9,0 | 10,1 | 10,2 | 10,8 | 11,4 |
| Italy | 10,2 | 9,5 | 10,7 | 11,0 | 11,4 | 11,4 |
| Netherlands | 17,5 | 17,5 | 18,2 | 18,4 | 19,0 | 18,8 |
| United Kingdom | 21,3 | 23,5 | 22,5 | 22,2 | 22,4 | 22,8 |
| **EU 27** | **16,5** | **15,5** | **16,6** | **16,9** | **17,1** | **17,4** |
| **3rd countries** | | | | | | |
| Argentina | 24,3 | 28,4 | 30,0 | 31,4 | 32,4 | 33,7 |
| Brazil | 35,5 | 36,4 | 38,1 | 39,7 | 40,4 | 45,4 |
| China | 7,6 | 7,8 | 8,6 | 9,0 | 9,1 | 9,2 |
| India | 1,7 | 1,7 | 2,0 | 2,2 | 2,2 | 2,3 |
| Iran | 17,3 | 18,5 | 22,4 | 22,2 | 23,2 | 24,8 |
| Japan | 14,8 | 15,5 | 15,3 | 15,1 | 15,6 | 16,3 |
| Mexico | 27,2 | 28,3 | 28,2 | 29,8 | 29,3 | 29,7 |
| Russian Federation | 14,9 | 16,6 | 18,6 | 20,1 | 21,2 | 21,0 |
| South Africa | 22,2 | 24,7 | 28,8 | 29,3 | 29,4 | 30,8 |
| United Arab Emirates | 42,6 | . | 54,9 | 63,8 | 63,1 | 59,1 |
| USA | 44,4 | 44,7 | 45,1 | 44,2 | 42,1 | 43,4 |

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

Source: MEG, according to its own and national estimates, and national information, 2011

# TURKEY

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 25 | 24 | 24 | 24 | 21 | 22 |
| Belgium/Luxembourg | 7 | 7 | 4 | 4 | 4 | 4 |
| Denmark | 0 | 0 | 1 | 1 | 0 | 0 |
| Finland | 14 | 12 | 11 | 10 | 9 | 9 |
| France | 545 | 519 | 469 | 456 | 421 | 412 |
| Germany | 349 | 331 | 330 | 386 | 383 | 439 |
| Greece | 3 | 1 | 3 | 3 | 3 | 3 |
| Ireland | 31 | 27 | 25 | 16 | 8 | 6 |
| Italy | 293 | 276 | 290 | 300 | 293 | 279 |
| Netherlands | 31 | 30 | 30 | 29 | 27 | 27 |
| Portugal | 39 | 41 | 42 | 40 | 38 | 39 |
| Spain | 20 | 21 | 18 | 25 | 28 | 25 |
| Sweden | 3 | 3 | 3 | 3 | 4 | 4 |
| United Kingdom | 206 | 184 | 165 | 160 | 157 | 162 |
| **EU-15** | **1.565** | **1.477** | **1.415** | **1.457** | **1.396** | **1.430** |
| Bulgaria | 0 | 0 | 1 | 1 | 0 | 0 |
| Czech Republic | 13 | 9 | 4 | 4 | 3 | 3 |
| Cyprus | 1 | 1 | 1 | 1 | 1 | 1 |
| Estonia | . | . | . | . | . | . |
| Hungary | 118 | 127 | 126 | 120 | 110 | 100 |
| Latvia | . | . | . | . | . | . |
| Lithuania | . | 4 | . | . | . | . |
| Malta | 0 | 0 | 0 | 0 | 0 | 0 |
| Poland | 257 | 272 | 285 | 285 | 280 | 280 |
| Romania | . | . | . | . | . | . |
| Slovakia | 1 | 1 | . | . | . | . |
| Slovenia | 8 | 8 | 7 | 6 | 6 | 6 |
| **EU-25/EU 27[1)]** | **1.975** | **1.911** | **1.851** | **1.886** | **1.809** | **1.832** |
| Brazil | 360 | 353 | 458 | 465 | 466 | 485 |
| Canada | 155 | 163 | 169 | 180 | 167 | 165 |
| Mexico | | 14 | 15 | 15 | 11 | 13 |
| Russian Federation | | 19 | 25 | 37 | 40 | 45 |
| USA | 2.497 | 2.577 | 2.703 | 2.833 | 2.569 | 2.560 |

[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, 2011

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

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 6,9 | 6,0 | 6,5 | 6,2 | 6,4 | 6,4 |
| France | 5,8 | 5,7 | 5,5 | 5,2 | 5,0 | 4,9 |
| Germany | 6,2 | 5,9 | 5,7 | 6,2 | 6,2 | 6,0 |
| Italy | 5,0 | 4,5 | 5,0 | 5,0 | 4,9 | 4,9 |
| Netherlands | 1,9 | 1,6 | 1,5 | 1,2 | 1,1 | 1,0 |
| United Kingdom | 4,0 | 4,5 | 4,0 | 3,9 | 4,0 | 3,9 |
| **EU 27** | **3,8** | **3,7** | **3,6** | **3,5** | **3,4** | **3,3** |
| **3rd countries** | | | | | | |
| Brazil | 1,1 | 1,0 | 1,5 | 1,4 | 1,6 | 1,6 |
| Canada | 4,4 | 4,4 | 4,6 | 4,9 | 4,5 | 4,4 |
| Mexico | 1,9 | 1,9 | 2,0 | 2,0 | 1,4 | 1,4 |
| Russian Federation | 0,9 | 0,8 | 0,7 | 0,7 | 0,6 | 0,5 |
| USA | 7,6 | 7,6 | 8,0 | 7,9 | 7,7 | 7,4 |

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, 2011

For further data and information:
**MEG- Marktinfo Eier & Geflügel**
**Tel: +49 (0)228 - 629 47 971**
**Fax: +49 (0)228 - 962 00 987**
**http://www.marktinfo-eier-gefluegel.de**
**mbeck@ulmer.de**

# DUCK

## DUCK PRODUCTION IN EU 27 ('000 t)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Austria | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 |
| Belgium/Luxembourg | 0,2 | 0,2 | 0,0 | 0,3 | 0,4 | 0,4 |
| Denmark | 4,1 | 4,5 | 0,0 | 0,0 | 0,0 | 0,0 |
| Finland | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 |
| France | 252,0 | 261,5 | 272,0 | 270,0 | 240,7 | 240,0 |
| Germany | 50,8 | 49,8 | 63,6 | 67,1 | 67,8 | 66,4 |
| Greece | 0,3 | 0,1 | 0,2 | 0,2 | 0,2 | 0,2 |
| Ireland | 6,5 | 6,5 | 6,5 | 5,8 | 3,9 | 4,6 |
| Italy | 15,0 | 15,0 | 15,0 | 15,0 | 15,0 | 14,0 |
| Netherlands | 16,0 | 17,0 | 17,0 | 17,0 | 17,0 | 18,0 |
| Portugal | 8,0 | 8,0 | 8,0 | 10,0 | 10,0 | 10,0 |
| Spain | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 |
| Sweden | 0,2 | 0,2 | 0,2 | 0,0 | 0,0 | 0,0 |
| United Kingdom | 45,0 | 45,0 | 38,0 | 35,0 | 30,0 | 30,0 |
| **EU-15** | **398,2** | **407,9** | **420,6** | **420,4** | **385,1** | **383,7** |
| Bulgaria | 16,1 | 18,2 | 16,8 | 13,0 | 17,5 | 18,0 |
| Cyprus | 0,2 | 0,2 | 0,2 | 0,2 | 0,2 | 0,2 |
| Czech Republic | 3,8 | 3,8 | 5,9 | 8,8 | 8,0 | 8,0 |
| Estonia | . | . | . | . | . | . |
| Hungary | 63,0 | 42,0 | 58,0 | 49,0 | 55,0 | 61,0 |
| Latvia | . | . | . | . | . | . |
| Lithuania | 0,2 | 0,2 | 0,2 | 0,3 | 0,2 | 0,2 |
| Malta | . | . | . | . | . | . |
| Poland | 18,0 | 16,0 | 17,0 | 17,0 | 17,0 | 17,0 |
| Romania | . | . | . | . | . | . |
| Slovakia | 0,5 | 1,0 | 0,5 | 0,4 | 0,4 | 0,4 |
| Slovenia | 1,2 | 1,2 | 1.2 | . | . | . |
| **EU-25/EU 27 [1)]** | **503** | **493** | **522** | **512** | **485** | **490** |

[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.

**POULTRY MEAT MARKET PROJECTIONS FOR THE EU-27, 2005-2020 ('000 t cwe)**

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Gross indigenous Production** | **11.663** | **11.646** | **11.922** | **11.996** | **12.058** | **12.116** | **12.181** | **12.256** | **12.352** | **12.387** | **12.448** | **12.466** |
| of which EU-15 | 8.939 | 8.932 | 9.145 | 9.209 | 9.256 | 9.298 | 9.345 | 9.399 | 9.476 | 9.498 | 9.570 | 9.582 |
| of which EU-12 | 2.724 | 2.714 | 2.777 | 2.786 | 2.803 | 2.818 | 2.836 | 2.856 | 2.876 | 2.888 | 2.878 | 2.884 |
| **Imports of live animals** | **0** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** |
| **Exports of live animals** | **7** | **7** | **8** | **8** | **8** | **8** | **8** | **8** | **7** | **7** | **7** | **7** |
| **Net Production** | **11.657** | **11.639** | **11.915** | **11.989** | **12.052** | **12.109** | **12.174** | **12.249** | **12.346** | **12.380** | **12.442** | **12.460** |
| **Imports (meat)** | **849** | **814** | **796** | **794** | **815** | **811** | **829** | **845** | **856** | **871** | **880** | **891** |
| **Exports (meat)** | **940** | **878** | **966** | **951** | **908** | **889** | **844** | **810** | **790** | **761** | **768** | **736** |
| **Consumption** | **11.572** | **11.584** | **11.753** | **11.832** | **11.970** | **12.057** | **12.204** | **12.338** | **12.464** | **12.559** | **12.630** | **12.707** |
| of which EU-15 | 8.896 | 8.916 | 9.047 | 9.103 | 9.226 | 9.296 | 9.437 | 9.560 | 9.676 | 9.762 | 9.824 | 9.894 |
| of which EU-12 | 2.677 | 2.668 | 2.706 | 2.729 | 2.744 | 2.761 | 2.767 | 2.777 | 2.789 | 2.797 | 2.806 | 2.813 |
| **Per Capita Consumption** | **23,25** | **23,18** | **23,44** | **23,51** | **23,71** | **23,80** | **24,02** | **24,22** | **24,41** | **24,53** | **24,62** | **24,72** |
| of which EU-15 | 22,56 | 22,49 | 22,71 | 22,75 | 22,96 | 23,03 | 23,29 | 23,51 | 23,71 | 23,85 | 23,92 | 24,02 |
| of which EU-12 | 25,90 | 25,84 | 26,23 | 26,47 | 26,63 | 26,82 | 26,90 | 27,03 | 27,17 | 27,28 | 27,40 | 27,51 |

Source: Prospects for agricultural markets and income in the EU 2009-2020, The European Commission, DG AGRI, December 2010
http://ec.europa.eu/agriculture/publi/caprep/prospects2010/fullrep_en.pdf

## AGGREGATE MEAT MARKET PROJECTIONS FOR THE EU 2009-2020 ('000 t cwe)

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Gross Indigenous Production** | **42.722** | **42.789** | **42.346** | **42.904** | **43.590** | **43.787** | **43.614** | **43.781** | **44.130** | **44.171** | **44.133** | **44.394** |
| of which EU-15 | 35.715 | 35.804 | 35.467 | 35.940 | 36.543 | 36.763 | 36.673 | 36.831 | 37.135 | 37.200 | 37.224 | 37.449 |
| of which EU-12 | 7.007 | 6.986 | 6.880 | 6.965 | 7.047 | 7.024 | 6.941 | 6.950 | 6.995 | 6.971 | 6.909 | 6.945 |
| **Imports of live animals** | **2** | **2** | **2** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** |
| **Exports of live animals** | **191** | **182** | **189** | **170** | **166** | **163** | **161** | **158** | **157** | **154** | **152** | **150** |
| **Net production** | **42.533** | **42.609** | **42.159** | **42.736** | **43.425** | **43.626** | **43.454** | **43.624** | **43.974** | **44.019** | **43.982** | **44.245** |
| **Imports (meat)** | **1.586** | **1.554** | **1.566** | **1.612** | **1.674** | **1.678** | **1.694** | **1.732** | **1.754** | **1.780** | **1.794** | **1.810** |
| **Exports (meat)** | **2.610** | **2.683** | **2.750** | **2.655** | **2.545** | **2.424** | **2.289** | **2.197** | **2.153** | **2.080** | **2.063** | **2.015** |
| **Consumption** | **41.549** | **41.281** | **41.033** | **41.750** | **42.464** | **42.807** | **42.840** | **43.123** | **43.436** | **43.536** | **43.585** | **43.879** |
| of which EU-15 | 33.942 | 33.723 | 33.516 | 34.141 | 34.773 | 35.080 | 35.111 | 35.386 | 35.669 | 35.761 | 35.802 | 36.065 |
| of which EU-12 | 7.607 | 7.558 | 7.517 | 7.609 | 7.691 | 7.727 | 7.728 | 7.737 | 7.767 | 7.775 | 7.783 | 7.814 |
| **Per capita consumption** | **83,48** | **82,65** | **81,72** | **82,84** | **84,13** | **84,67** | **84,46** | **84,72** | **85,08** | **85,07** | **84,96** | **85,36** |
| of which EU-15 | 86,07 | 85,07 | 84,14 | 85,32 | 86,52 | 86,93 | 86,67 | 87,02 | 87,41 | 87,35 | 87,18 | 87,56 |
| of which EU-12 | 73,60 | 73,19 | 72,86 | 73,80 | 74,65 | 75,06 | 75,13 | 75,29 | 75,66 | 75,83 | 76,02 | 76,43 |
| of which Beef/Veal | 16,55 | 16,35 | 15,96 | 15,69 | 15,87 | 16,11 | 15,99 | 15,80 | 15,58 | 15,50 | 15,42 | 15,37 |
| of which Sheep/goat | 2,28 | 2,20 | 2,15 | 2,11 | 2,10 | 2,08 | 2,05 | 2,04 | 2,02 | 2,00 | 1,98 | 1,96 |
| of which Pig meat | 41,39 | 40,92 | 40,18 | 41,52 | 42,46 | 42,66 | 42,39 | 42,66 | 43,08 | 43,03 | 42,95 | 43,31 |
| of which Poultry meat | 23,25 | 23,18 | 23,44 | 23,51 | 23,71 | 23,80 | 24,02 | 24,22 | 24,41 | 24,53 | 24,62 | 24,72 |

Source: Prospects for agricultural markets and income in the EU 2009-2020, The European Commission, DG AGRI, December 2010
http://ec.europa.eu/agriculture/publi/caprep/prospects2010/fullrep_en.pdf

# TABLE EU 27 POULTRYMEAT IMPORT - EXPORT TRADE MAIN TARIFF LINES, 2000 - 2005 - 2009 - 2010

**IMPORTS**

Source: Extraction EUROSTAT, June 2011

| CN CODE | Product definition | QUANTITY 100 KG | | | | VALUE € /100KG | |
|---|---|---|---|---|---|---|---|
| | | 2000 | 2005 | 2009 | 2010 | 2009 | 2010 |
| **0207** | **MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN** | **1.242.491** | **4.066.314** | **1.726.700** | **1.413.074** | **181,64** | **210,23** |
| 02071290 | Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens' | 37.605 | 102.912 | 147.930 | 110.296 | 116,48 | 127,78 |
| 02071410 | Frozen boneless cuts of fowls of the species Gallus domesticus | 657.901 | 2.408.760 | 1.075.323 | 938.182 | 209,71 | 224,12 |
| 02071420 | Frozen halves or quarters of fowls of the species Gallus domesticus | 195.491 | 716.288 | 131.815 | 34.887 | 81,95 | 130,52 |
| 02071460 | Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in | 131.120 | 406.058 | 143.057 | 116.477 | 108,98 | 146,84 |
| 02072710 | Frozen boneless cuts of turkeys of the species domesticus | 79.809 | 168.457 | 110.884 | 128.140 | 241,57 | 282,30 |
| **02109939** | **MEAT, SALTED, IN BRINE, DRIED OR SMOKED** | | **32.804** | **2.127.172** | **1.938.755** | **195,86** | **230,55** |
| **1602** | **PREPARED/PRESERVED MEAT** | **862.051** | **3.091.037** | **4.324.909** | **4.304.188** | **260,87** | **278,83** |
| 160231 | **TURKEYS** | 300.920 | 945.610 | 976.428 | 837.873 | 228,16 | 267,45 |
| 16023111 | Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products) | 289.398 | 927.902 | 945.534 | 789.395 | 223,85 | 260,71 |
| 160232 | **GALLUS DOMESTICUS** | 542.887 | 2.075.458 | 3.218.112 | 3.327.040 | 257,64 | 270,07 |
| 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 | 179.908 | 119.034 | 235,19 | 286,88 |
| 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 | 2.308.237 | 2.339.734 | 282,55 | 298,81 |
| 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 | 695.096 | 815.541 | 176,55 | 182,89 |
| 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 | 34.871 | 52.731 | 341,34 | 304,73 |
| 160239 | **OTHER** | 18.243 | 69.969 | 130.369 | 139.275 | 585,41 | 556,75 |
| 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 | 124.809 | 133.856 | 588,96 | 559,18 |

**EXPORTS** Source: Extraction EUROSTAT, June 2011

| CN CODE | Product definition | QUANTITY 100 KG | | | | VALUE € /100KG | |
|---|---|---|---|---|---|---|---|
| | | 2000 | 2005 | 2009 | 2010 | 2009 | 2010 |
| **0207** | **MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN** | **8.970.790** | **7.399.228** | **7.368.712** | **9.339.212** | **100,00** | **106,66** |
| 02071210 | Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens', | 526.148 | 238.326 | 139.316 | 236.448 | 106,56 | 106,59 |
| 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 | 2.600.346 | 2.783.196 | 101,43 | 113,99 |
| 02071410 | Frozen boneless cuts of fowls of the species Gallus domesticus | 894.080 | 1.088.275 | 1.751.290 | 1.874.885 | 56,79 | 51,07 |
| 02071420 | Frozen halves or quarters of fowls of the species gallus domesticus | 889.227 | 387.310 | 417.829 | 1.077.484 | 106,33 | 115,51 |
| 02071430 | Frozen whole wings, with or without tips of Gallus domesticus | 945.626 | 645.813 | 792.635 | 945.604 | 109,38 | 117,72 |
| 02071460 | Frozen legs and cuts thereof of fowls of the species gallus | 357.815 | 279.290 | 219.443 | 484.348 | 79,81 | 87,38 |
| 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 | 363.040 | 607.184 | 76,63 | 83,12 |
| 02072710 | Frozen boneless cuts of turkeys of the species domesticus | 1.563.698 | 581.402 | 302.138 | 310.164 | 60,82 | 83,19 |
| 02072730 | Frozen whole wings, with or without tips, of turkeys | 121.849 | 179.604 | 187.899 | 217.295 | 124,21 | 125,83 |
| 0207 other | | 696.322 | 919.290 | 594.456 | 802.604 | 237 | 219,47 |
| **1602** | **PREPARED/PRESERVED MEAT** | **294.931** | **289.899** | **449.123** | **451.369** | **278,54** | **279,46** |
| 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 | 157.546 | 181.467 | 291,72 | 286,35 |
| 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 | 123.401 | 103.597 | 296,41 | 309,19 |
| 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 | 63.975 | 66.787 | 123,63 | 125,46 |
| 1602 other | | 102.212 | 80.193 | 104.201 | 99.518 | 332,55 | 338,88 |

## UPCOMING AND PENDING LEGISLATIVE PROPOSALS

### ANIMAL WELFARE

**New Community Action Plan on the Protection and Welfare of Animals 2011-2015**
The Commission's preparation of the new animal action plan continues. The Parliament concluded in March 2010 its report to Commission and made recommendations for the action plan 2011-2015. The Commission is expected to publish its Action Plan in December 2011.

**Dir. 2007/43/EC - Minimum rules for protection of chickens kept for meat production**
The Directive 2007/43 entered into force in June 2010 and set the rules for maximum stocking density, feeding and drinking facilities, ventilation, heating, light, litter, noise, record keeping, training and surgical interventions. EFSA published in July 2010 its report on housing and management of broiler breeders and its report on genetic selection of broilers. The Commission will use these opinions for its reports to be published end of 2012 including comments on the first experience with the implementation of Directive 2007/43 by Member States.

**Regulation 1/2005 - Protection of animals during transport**
It is currently under revision and covers transport of animals including poultry. Harmonised standards should apply in all Member States. EFSA has published a scientific opinion concerning the welfare of animals during transport in January 2011. The report is the 3rd in the series on animal welfare (housing management, animal welfare at time of killing). Commission is expected to present a communication to the Council and European Parliament by the 2nd half of 2011 possibly thereafter it will be followed by legal proposals to review the Regulation.

### ANIMAL HEALTH

**Regulation 616/2009 implementing Directive 2005/94/EC on approval of poultry compartments**
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 Regulation is in force but the implementation by instalment of compartments is delayed for several reasons for lack of sufficient capacity in both public and private sectors.

**Proposal COM (2010) 872 final on novel foods, amending Regulation (EC) 1331/2008 and repealing Regulation (EC) 258/97 and Commission Regulation (EC) 1852/2001**
The proposal on novel foods includes foods derived from plants and animals produced by non-traditional breeding techniques as cloning. The latest EFSA update from September 2010 concludes that not enough information is available for an assessment of food safety and animal health and welfare aspects.
A conciliation on novel foods failed after more than 3 years of negotiations as the European Parliament and Commission were unable to compromise on mandatory labelling for food derived from offspring of cloned animals irrespective of the technical feasibility and the practical implications of such mandatory labelling. In the absence of an agreement, EU stays with the status quo. The Commission has promised a new proposal soon. The current EU legislation provides that food from cloned animals is subject to a pre-market authorisation. The cloning technique is not prohibited at EU level.

### FOOD AND FEED SAFETY

**SANCO/2007/1489/EC - Regulation amending Annex II to Regulation (EC) 853/2004** as regards the requirements concerning frozen food of animal origin intended for human consumption. The purpose of the current draft Regulation (EC) 853/2004 is to require food business operators to make available in an appropriate form to the food business operator to whom the food is supplied and, upon request, to the competent authority, information relating to production date and animal origin frozen food.
This Regulation shall enter into force on the twentieth day following that of its publication in the Official Journal of the European Union. It shall apply from 1 July 2012.

**SANCO/2007/1490/EC - Draft Regulation on the traceability requirements set by Regulation (EC) 178/2002** for food of animal origin
The purpose of the current draft is to require food business operators to make available in an appropriate form to the food business operator to whom the food is supplied and, upon request, to the competent authority, information relating to the consignment. For imported food of animal origin, this information is already present in the health certificate accompanying the batch.
This Regulation shall enter into force on the twentieth day following that of its publication in the Official Journal of the European Union. It shall apply from 1 July 2012.

**SANCO/2010/11010 amending Annex II to Regulation (EC) 2160/2003 and Annex I to Regulation (EC) 2073/2005 as regards Salmonella in fresh poultry meat (on-going)**
The proposal of the Commission has been adopted by the SCoFCAH and

is expected to come into force December 2011. From then Salmonella enteritidis and Salmonella typhimurium must be absent in 25 g. sampled poultry meat. Salmonella serotyping at farm level is a prerequisite for further handling of the meat of these flocks in the slaughterhouse.

**SANCO/6876/2009- AMR (antimicrobial resistance) - (on-going)**
April 2011 the European Parliament called for tougher controls on the use of antibiotics in animal production. **a.v.e.c.** has delivered input to an EMEA consultation and is currently working on a strategy paper for the promotion of responsible use of medicines.

**Revision of the hygiene package: Regulations 852/2004 - 853/2004 - 854/2004 (on-going/ Impact Assessment)**
The "Hygiene" Regulations in force from 2006 lay down rules for the food chain "from stable to table" that is food safety throughout the food chain starting with the primary production. Currently the issues under revision concerning **a.v.e.c.** deals with the definition of MSM, meat preparations and meat products and "fresh" and "frozen". An impact assessment of possible amendments is on-going.

**Mechanically Separated Meat (MSM) (on-going)**
The different MSM qualities have also in 2010 and 2011 been discussed with the Parliament under the "Food information to consumers" proposal and the revision of the Hygiene regulations. **a.v.e.c.** is still promoting the recognition of the process that confirms the quality of the meat by processes not causing a substantial loss of the muscle fibre structure.

**Modernisation of Meat Inspection in EU slaughterhouses (on-going)**
Based on the experience of applying the Hygiene Regulations 852, 853 and 854 of 2004 the Commission aims to modernise the meat inspection in EU slaughterhouses by developing a risk-based approach for considering specific hazards related to production systems. The Commission has collected the first round of answers from Member States and stakeholders.

**Reintroduction of Processed Animal Protein (PAP) - SANCO/10843/2011 amending Regulation 999/2001 laying down rules for the prevention, control and eradication of certain transmissible spongiform encephalophathies (on-going)**
The Commission has presented a communication outlining the reintroduction of the use of PAP and amending Regulation 999/2001. The ban on feeding animal proteins to ruminants remains in place as does the ban on intra-species recycling which is laid down in Regulation 1069/2009. The Parliament has endorsed the proposal of Commission. The proposal can enter into force in the 2nd half of 2012.

**Community Guide: "Principles to manage Salmonella control in feed"**
According to Article 5(3) of Regulation 183/2005 feed business operators shall comply with specific microbiological criteria and take measures or adopt procedures necessary to meet specific targets with the view to minimize Salmonella in feed. COPA-COGECA, COCERAL, FEDIOL and FEFAC have presented the guide to their stakeholders and Commission. The principles will be guiding the application and amendments of the existing guides.

**Adventitious presence of GM material in feed (Proposal) - SANCO 13368/2010 (on-going)**
After more than two years of discussion, the Member States have accepted the proposal of Commission (SANCO 13368/2010) laying down the methods of sampling and analysis for the official control of feed as regards presence of genetically modified material for which an authorisation procedure is pending or the authorization of which has expired. The purpose of the proposed regulation was to provide a tolerance (0.1%) for the low-level adventitious presence of GMOs authorised by third countries (but not the EU) in consignments of feed raw materials such as maize and soya.

## MARKETING STANDARDS - LABELLING - PRODUCT QUALITY

**Regulation 543/2008 implementing Regulation 1234/2007 - marketing standards for poultry (pending)**
Important issues for **a.v.e.c**.: interpretation of "meat product" and "meat preparation", chilling method and water content and definition of different cuts, especially breast fillet.
**a.v.e.c.** has studied the appropriate amendments for the Regulation 543/2008 but also amendments of the Regulation 1234/2007 that might be needed. It is evident that amending the regulations may take some years given the possible impact assessments by the Commission and the involvement of Council and European Parliament.

**COM (2008) 40 (proposal) - Food information to consumers "labelling" (on-going)**
The second version based on the Council's document from February was endorsed by Parliament in July 2011. Depending on the Commission's and Council's final approval the Regulation might be adopted in October 2011.

**COM (2010) 7333 (proposal) - Agricultural Product Quality as regards PDOs and PGIs (adopted)**
The Commission published its legislative proposal COM (2010) 7333 including the recommendation to maintain the Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) schemes in December 2010. In 2010 it was suggested to merge the schemes but this has been abandoned based on input from a consultation held in 2010.

# DISCUSSION - NEW POULTRY SECTOR CHALLENGES: CAMPYLOBACTER AND AMR

## CAMPYLOBACTER

The Commission has asked EFSA in 2008 for advice on Campylobacter. EFSA should
- identify and rank possible control points
- propose potential performance objectives and/or targets at different stages of the food chain to obtain 50-90% reductions of the human prevalence.

Campylobacter is responsible for approximately 9 million human infections in the EU each year of which broiler meat is responsible for approximately 20-30%.

EFSA published in 2010 a baseline study on Campylobacter and Salmonella and concluded on Campylobacter that many issues like age of bird slaughtered, season, time of the day of slaughter, the sampling procedures, chilling methods all are important aspects of influencing infection at the slaughterhouse level. Organic poultry that live longer and have outdoor access has even higher levels of contamination.

In April 2011 EFSA published a scientific opinion on the control options for Campylobacter. The opinion makes recommendations from farm to slaughterhouse. In line with the Codex Alimentarius recommendations from December 2010 EFSA states that chemical solution cannot substitute Good Hygiene Practice (GHP) at farm level, during transport and in the slaughterhouse.
EFSA suggests at farm level improved GHP- bio security measures, fly screens, no thinning and to slaughter birds younger. At slaughterhouse level EFSA suggests freezing of meat, irradiation of the meat or use of chemical substances. During transport EFSA says much can be done by improving hygiene of the crates used for the transport.

Only with the use of freezing, irradiation or chemical substances at slaughterhouse level it is possible to reach the substantial reductions of 50-90%.

**a.v.e.c.** thinks it is important first to know exactly which Campylobacter are responsible for human cases so the measures in slaughterhouses can be targeted. The use of irradiation, freezing and chemical substances are not acceptable to consumers - so there is a need to look for alternatives. Testing of vaccines and use of lactic acid have not been successful but the use of bacteriophages have had some success and could be looked into. There is a need for much more research before targeted measures can be taken.

CAMPYLOBACTER - Campylobacter jejuni and Campylobacter coli are common in broilers. Transmissions to flocks occur horizontally. So far no vaccines have proven effective for Campylobacter.

### ANTIMICROBIAL RESISTANCE - USE OF ANTIBIOTICS

In October 2009 EFSA, the European Centre for Disease Control (ECDC), the European Medicines Agency (EMEA) and SCENIHR issued a joint opinion on the antimicrobial resistance (AMR), concluding that bacterial resistance to antimicrobials has increased in recent years worldwide making it more difficult to treat some human and animal infections. Use of biocides may also contribute to the bacterial resistance. EMEA estimates that approximately 25 000 patients die each year in the EU from an infection due to multidrug resistant bacteria.

In January 2011 EMEA conducted a consultation on AMR. The Commission outlines in its road map from 2011 the framework of a communication on antimicrobial resistance (AMR) including ideas for further proposals for concrete actions. The prudent use of antimicrobials for humans and animals, improved enforcement and assessment of the Member State strategies and actions plans on prudent use are essential to reduce AMR. **a.v.e.c.** fully supports the Commission's choice for a holistic approach which is needed in order to take into account all sources of resistance and all potential impacts of antimicrobial resistance i.e. public health, food safety, consumer safety, environment, animal health and welfare as well as non-therapeutic use of antimicrobial substances.

**a.v.e.c.** is aware of the growing concern of antimicrobial resistance and the link between healthy animals and public health. **a.v.e.c.** is committed to improve farming methods and believe observing strict bio-security measures is important. **a.v.e.c.** can agree that antibiotics are needed but may be administered in a more targeted way if this is not already practice. It is advisable that both company and official veterinarians subscribe to prudent use as suggested by the EPRUMA initiative.

The health and welfare of our animals matter and must not be compromised or threatened. For this reason further research on the targeted use of medicines and antibiotics should be carried out. The prescription and administration of veterinary and human medicines is neither harmonised nor monitored in a comparable manner in the EU. It is necessary to establish an EU coordinated monitoring of the use in both human and animal medicines and antibiotics.

Antimicrobials are substances used to kill micro-organisms or to stop them growing and multiplying. They are commonly used to treat infectious diseases in human and veterinary medicine for instance in the form of antibiotics.

References:

http://www.efsa.europa.eu/en/press/news/biohaz110407.htm?WT.mc_id=EFSAHL01&emt=1
http://www.efsa.europa.eu/en/topics/topic/amr.htm
http://www.epruma.eu/
http://ecdc.europa.eu/en/Pages/home.aspx

# BOARD MEMBERS AND DEPUTY BOARD MEMBERS 2011

| | | |
|---|---|---|
| **BELGIUM** | Constant Wauters (BM) | Ann Truyen (DBM) |
| **CZECH REPUBLIC** | František Mates (BM) | Andrea Ptáčková (DBM) |
| **DENMARK** | Jan Klarskov Henriksen (BM) | Christoffer Susé (DBM) |
| **FINLAND** | Marika Säynevirta (BM) | Marja Joutsen (DBM) |
| **FRANCE** | Paul Lopez (BM & VP) | Gilles le Pottier (DBM) |
| **GERMANY** | Paul-Heinz Wesjohann (BM & VP) | Dr. Thomas Janning (DBM) |
| **HUNGARY** | László Bárány (BM) | György Endrödi (DBM) |
| **ITALY** | Aldo Muraro (BM & VP) | Bruno Veronesi (DBM) |
| **NETHERLANDS** | Peter Poortinga (BM) | Peter Vesseur (DBM) |
| **POLAND** | Maciej Przyborski (BM) | Konrad Pazgan (DBM) |
| **PORTUGAL** | José António dos Santos (BM) | Manuel Limá (DBM) |
| **ROMANIA** | Ilie Van (BM) | Ovidiu Oprita (DBM) |
| **SLOVENIA** | Nada Krajnc (BM) | Janez Rebec (DBM) |
| **SPAIN** | Federico Felix (BM & VP) | Claudio Arenas (DBM) |
| **SWEDEN** | Maria Donis (BM) | Jimmy Samuelsson (DBM) |
| **UNITED KINGDOM** | Noel Bartram (BM) | Peter Bradnock (DBM) |

*BM: Board member
DBM: Deputy board member
VP: Vice president

## BELGIUM

V.I.P. –België
Vereniging van Industriële Pluimveeslachterijen
Korsele 70
9667 Horebeke
Belgium

Phone: +32 55 49 99 70 - Fax: +32 55 45 78 56
E-mail: vip-belgie@skynet.be

## CZECH REPUBLIC

Sdruzeni Drubezarskych Podniku
Dopravaku 3/749
184 00 Praha 8
The Czech Republic

Phone: +420 272 774 686 - Fax: +420 272 766 136
E-mail: sdruzeni.dp@volny.cz

## DENMARK

DSF - Dansk Slagte Fjerkrae
Axelborg
Axeltorv 3, 7th floor
1609 Copenhagen V
Denmark

Phone: +45 33 39 40 00 - Fax: +45 33 39 41 41
E-mail: ksv@poultry.dk
www.danskfjerkrae.dk

## FINLAND

The Finnish Poultry Processing
Industries Association
P.O. Box 115
00241 Helsinki
Finland

Phone: +358 9 14 88 71 - Fax: +358 9 14 88 72 01
E-mail: marika.saynevirta@etl.fi

## FRANCE

FIA - Fédération des Industries Avicoles
184, rue de Vaugirard
75015 Paris
France

Phone: +33 1 53 58 48 10 - Fax: +33 1 53 58 48 19
E-mail: contact@fia.fr
www.fia.fr

CIDEF - Comité Interprofessionnel de la Dinde
11, rue de Plaisance
B.P. 24
35310 Mordelles
France

Phone : +33 2 99 60 31 26 - Fax : +33 2 99 60 58 67
E-mail : cidef@wanadoo.fr

## GERMANY

ZDG - Bundesverband der Geflügelschlachtereien e.V.
Claire-Waldoff-Strasse 7
10117 Berlin
Germany

Phone: +49 30 28 88 31 10 - Fax: +49 30 28 88 31 50
E-mail: bvg@zdg-online.de
www.zdg-online.de

## HUNGARY

BTT - Baromfi Termék Tanács
Páva u. 8
1094 Budapest
Hungary

Phone: +361 269 2998 - Fax: +361 269 2995
E-mail: titkarsag@magyarbaromfi.hu
www: mbtt.hu

## ITALY

UNA – Unione Nazionale dell'Avicoltura
Via Vibio Mariano 58
00189 Roma
Italy

Phone: +39 0633 25 841 - Fax: +39 0633 25 24 27
E-mail: una@unionenazionaleavicoltura.it
www.unionenazionaleavicoltura.it

## NETHERLANDS

NEPLUVI - Vereniging de Nederlandse Pluimveeverwerkende Industrie
Postbus 331
3990 GC Houten
Netherlands

Phone: +31 30 63 55 252 - Fax: +31 30 65 71 114
E-mail: info@nepluvi.nl
www.nepluvi.nl

## POLAND

KRD IG - Krajowa Rada Drobiarstwa- Izba Gospodarcza
Ul. Czackiego 3/5
00-043 Warszawa
Poland

Phone: +48 (0-22)33 61 338 - Fax: +48 (0-22) 82 82 389
E-mail: krdig@pro.onet.pl, krd-ig@krd-ig.com.pl
www.krd-ig.com.pl

## PORTUGAL

ANCAVE - Associação Nacional dos Centros de Abate
e Indústrias Transformadoras de Carne de Aves
Av. Miguel Bombarda, 120 - 3°
1050-167 Lisboa
Portugal

Phone: +351 21 79 66 439 - Fax: +351 21 47 40 723
E-mail: ancave@mail.telepac.pt

## ROMANIA

UCPR - Uniunea Crescatorilor de Pasari Din Romania
Bdul Ion Mihalache nr. 106, bloc 84, Scara A, Ap. 24, Sector 1
Bucuresti
Romania

Phone: +40 01 666 37 65 - Fax: +40 01 666 37 65
E-mail: ilievan@yahoo.com
www.desprepui.ro

## SLOVENIA

GIZ - Mesne Industrije Slovenije
Dimičeva 9
1000 Ljubljana
Slovenia

Phone: +386 1 565 74 10 - Fax: +386 1 565 92 45
E-mail: giz.mi@siol.net

## SPAIN

AMACO – Asociación Nacional de Mataderos de Aves Conejos
Y Salas de Despiece
Diego de León 33, 4° D
28006 Madrid
Spain

Phone: +34 91 51 58 545 - Fax: +34 91 51 58 546
E-mail: amaco@amaco.es

PPROPOLLO – Organización Interprofesional de la Avicultura
de Carne de Pollo del Reino de España

Diego de León 33, 4° D
28006 Madrid
Spain

Phone: +34 91 562 42 93 - Fax: +34 91 56 23 231
E-mail: propollo@propollo.com

## SWEDEN

Svensk Fågel
105 33 Stockholm
Sweden

Phone: +46 8 787 55 20 - Fax: +46 8 787 53 21
E-mail: maria.donis@svenskfagel.se
www.svenskfagel.se

## UNITED KINGDOM

BPC - British Poultry Council
Europoint House
5, Lavington Street
London SE1 0NZ
United Kingdom

Phone: +44 (0) 778 53 92 608
E-mail: pbradnock@britishpoultry.org.uk

avec

Association of Poultry Processors and Poultry Trade in the EU Countries