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ANNUAL REPORT

avec

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

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INTRODUCTION

According to legend, the Ancient Greeks considered the cock as a sacred symbol of Apollo, and it was also associated with the life-giving force of the sun with his son, Asklepios, the healer god. Themistocles, a famous Athenian strategist and commander proposed to include the review of cock fights in the program of military training during the Greco-Persian wars. He used to say, "Let the young warriors see how selflessly the roosters fight, and learn firmness and bravery from them". Later in history, the Romans believed that cock fighting could tell fortunes, especially during wartime. Chickens accompanied Roman armies, and their behaviour was carefully observed before battle.

Since the olden days poultry has been considered, across cultures and civilizations, a magic symbol of life giving force and strength to the human population.

Nowadays, the magic has disappeared but poultry meat remains an essential source of protein for mankind's diet and for several reasons, poultry is forecast to have a bright future.
Poultry meat can be produced in a very efficient way which makes it one of the lowest cost animal proteins with a low environmental footprint. It has good nutritional values with high amounts of protein and low fat content. In addition poultry does not carry any religious restrictions and is consumed almost all over the world. As a consequence the price for consumers is reasonable which is important in meeting the challenge of feeding the growing world population.

Therefore poultry meat is perfectly adapted to meet the growing need to provide food, raw materials and energy to more than nine billion people in sustainable way.

In times of crucial trade negotiations, the European poultry industry should 'leave no stone unturned' and should promote its high and costly standards of quality, food safety and sustainability. The EU negotiators and the EU Institutions have the responsibility and the duty to preserve the standards reached by European producers and not to see them degraded.

In addition consumers should be confident that the quality of European poultry meat is continuously improved by responding to the different demands, of which food safety is key. **a.v.e.c.** is proactively working on improving European producers' performance as regards Campylobacter and antimicrobial resistance. The European poultry industry remains keen on the principle "Prevention is better than cure" by improving animal health through biosecurity measures, disease prevention and good management practices.

Meanwhile, a.v.e.c is also following the revision of the hygiene legislative package and it is highly committed to cooperation with the European Commission in designing new and more effective meat inspections and food chain related best practices and guidelines.

The European poultry industry is getting ready for the big change in food labelling legislation (Food information to consumer legislation) and its main provisions which will become mandatory at the end of 2014 and in 2015. Producers are faced with substantial changes in their production systems to help consumers make better informed choices.

Poultry producers are conscious of their role in preserving the environment and producing meat in an efficient and sustainable way. That is why **a.v.e.c.** has actively participated to the FAO-led LEAP project to assess the environmental performance of poultry production, in order to further improve the already good carbon footprint of poultry meat.

a.v.e.c. will continue to assist the EU poultry meat industry to meet future challenges while cooperating with the EU institutions and helping producers to better serve the expectations of the consumers not only within but outside the European Union too.

It will therefore be vital for **a.v.e.c.** to secure the support of the European institutions; both officials in the European Commission and politicians in the European Parliament - that has been substantially refreshed with approximately 50% new members elected in May 2014.

Federico Felix
President

Cees Vermeeren
Secretary General


"Keeping poultry business profitable with European Standards"

a.v.e.c. – OUR ASSOCIATION

Who are we?

a.v.e.c. is a voluntary, non-profit association created in 1966 with the objective of representing and promoting 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.**'s members represent 95% of the EU poultrymeat production.

a.v.e.c. seeks to influence the drafting and implementation of EU legislation, which may have consequences for the industry and for EU consumers. We strive to continuously improve the established, strong cooperation with the different services of the European Commission and the Parliament. On December 1st 2009 the Lisbon treaty entered into force. With the Lisbon treaty the European Parliament has gained more influence (co-decision procedure) on a number of legislative proposals of interest to the poultry industry and **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 institutions, 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, Secretary General.

On a daily basis the secretariat of **a.v.e.c.** gathers and distributes information and analysis of 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

Federico Felix, president of the Spanish poultry association Propollo, was elected president of **a.v.e.c.** in 2012. The president leads the 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, Paul Lopez from FIA/CIDEF (France), Jan Odink from NEPLUVI (Netherlands), Bruno Veronesi from UNAITALIA (Italy) and Paul Heinz Wesjohann from BVG (Germany). The presidency and vice-presidency are elected every two years and are renewable.

a.v.e.c.'s 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 its annual reception in connection with the first board meeting to facilitate an exchange of views between board members, 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. Representatives of the members and businesses meet in the annual general gathering that usually is held in autumn with up to 150 delegates. 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 industry.

WHO ARE 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 EU Member States, representing approximately 95% of 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:

AUSTRIA
QGV - Austrian Poultry Health Service
Österreichische Qualitätsgeflügelvereinigung

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

CZECH REPUBLIC
Sdruzeni 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
Unione Nazionale Filiere Agroalimentari Carni e Uova

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

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

SWEDEN
Svensk Fågel

UNITED KINGDOM
BPC – British Poultry Council

avec

ProPollo

NEPLUVI

una italia
UNIONE NAZIONALE FILIERE AGROALIMENTARI CARNI E UOVA

VIP - BELGIE

FIA

ETL

KRD
Izba Gospodarcza

ancave

Uniunea Crescătorilor de Păsări din România
UCPR

BTT
Baromfi Termék Tanács

BVG

bpc

SVENSK
FÅGEL

ÖGV
ÖSTERREICHISCHE QUALITÄTSGEFLÜGELVEREINIGUNG

EU AND INTERNATIONAL KEY PARTNERS

a.v.e.c. cooperates with many other international organisations depending on the issues at hand. **a.v.e.c.** has regular contacts with other stakeholders in the agricultural food sector, in particular with the meat sector. The exchange of views with other involved stakeholders on technical and strategic issues can be very useful.

The **a.v.e.c.** office may be called the "European Poultry House" since it combines the representation towards the European institutions for the poultry meat processors (**a.v.e.c.**), the poultry breeders (EPB), the hatcheries (AEH) and traders of hatching eggs and day old chicks (EPEXA) in the European Union. This unique situation allows the European poultry sector to profit from the mutual sharing of knowledge on common poultry issues and it strengthens our efforts to improve the global competitiveness.

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 and FOODDRINKEUROPE representing the European food and drink industry.

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, EUROCOMMERCE association for retail, wholesale and international trade interests and EFFAB, European Forum of Farm Animal Breeders.

The cooperation and coordination with these European associations may result into common positions and letters. Some guides to promote for example food safety or welfare of poultry have been drafted to assist members with the implementation and application of European legislation.

a.v.e.c., MEMBER OF THE IPC (International Poultry Council)

The International Poultry Council was founded on 5 October 2005 on the initiative of **a.v.e.c.** together with associations in Argentina, Brazil, Canada, Chile, China, Egypt, the EU, Mexico, Thailand, Turkey and the USA. 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 and FAO/Codex Alimentarius taken active part in e.g. the work concerning:

- Private standards
- Animal health and welfare as concerning
  * the chapter on Animal Welfare and Broiler Chicken Production System of the Terrestrial Animal Health Standards Code. IPC has presented arguments why feed conversion should not be used as an indicator of animal welfare.
  * the development of a science-based and neutral nomenclature system for emerging diseases, including influenza viruses.
- Food safety standards
- Guidelines on the control of Salmonella and Campylobacter

Facts about the IPC :

- Founded on 7 October 2005
- Official seat: 47-51, Rue du Luxembourg, 1050 Brussels, Belgium
- President: Mr. James H. Sumner, USAPEEC
- Vice-president: Mr. Ricardo Santin, UBABEF, Brazil
- Treasurer: Mr. Robin Horel, the Canadian Poultry and Egg Processors Association,
- Members-at-large: Wang Jinyou, CFNA, China
  Dr. Vivien Kite, ACMF, Australia
  Mr. Cees Vermeeren, **a.v.e.c.**, Europe
- Represents more than 90% of world broiler production and about 95% of world poultry trade.

Recent IPC Conferences

- *Sydney*, Australia, 2009
- *Paris*, France 2010
- *Santiago*, Chile, 2010
- *Rome,* Italy, 2011
- *Livingstone,* Zambia, 2011
- *Paris*, France 2012
- Salvador, Brazil, 2012
- Bangkok, Thailand, 2013
- Geneva, Switzerland, 2013
- Istanbul, Turkey, 2014

FAO - IPC partnership on LEAP:

The Livestock Environmental Assessment Performance (LEAP) Partnership is a unique endeavour to harmonize the environmental performance assessment and monitoring of livestock supply chains on a global scale. IPC has been a partner in this project since 2012 when it was launched.
The main focus of the Partnership is the development of broadly recognized sector specific guidelines (metrics and methods) for monitoring environmental impact of the livestock sector that will result in a better understanding and management of the key factors influencing the sector's performance.
Draft guidelines for feed, poultry and eggs and small ruminants have been developed by the FAO-led LEAP. After the Steering Committee (SC) meeting of LEAP on 7th of March they have been submitted to public review until 31 July 2014. The guidelines can be accessed on the LEAP website .
In the preparation of these guidelines **a.v.e.c.**, together with other members of IPC, had the opportunity to contribute and many of the comments have been taken on board thanks to the good coordination and assistance of the IPC delegates.
In early October 2014 the guidelines will ideally be ready for publication, and the LEAP SC members will review the whole process to decide whether extra time for revision is needed and if road tests are deemed necessary.

a.v.e.c. FOCUS

This section gives an overview of the main themes **a.v.e.c.** has worked on during 2013-2014. 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 website: www.avec-poultry.eu

www.avec-poultry.eu

High consumer expectations leading to higher costs

Today poultry meat is the second most important meat in the EU, both in production and consumption. All market analyses point to a bright future for our sector especially in developing countries and poultry meat will soon supplant pork as the world's most eaten meat. This strength creates opportunities for European producers. But a study of the competitiveness of the European poultry meat industry commissioned by **a.v.e.c.** shows that our sector has also weaknesses and is facing different threats.

In particular, European producers have to meet much more complex and diversified consumer expectations than most of our competitors.

This is particularly the case in the Western EU, where consumers are both quality and price sensitive in their purchases of meat.

The Consumer Market Study on the Functioning of the meat market for consumers in the European Union[1] as reported by DG SANCO in May 2013, shows clearly that consumers' purchasing decisions are determined firstly by the appearance (freshness and presentation) of the product and that the price should be reasonable and affordable. Much less important were animal welfare and origin of the product.

Wide ranging EU legislation is promoting consumers' interests and expectations and as a consequence, our sector has to comply with the highest requirements in the world in terms of animal welfare, environment, food safety and marketing standards. This results in higher costs of production for our sector as reflected in the study on the competitiveness of poultry meat sector carried out by LEI Wageningen: the additional cost related to the EU legislation is estimated approximately at 5 % of the total cost of farm production.

Legislation harming EU competitiveness on both internal and external markets

The majority of consumers in the countries of our main competitors (Argentina, Brazil, USA and Thailand) are less demanding than European consumers and as a consequence no or weaker legislation exists in these countries (see figure 1):

Figure 1

Regulation in selected non-EU countries (Brazil, Argentina, USA and Thailand)			
	Political and societal interest	Regulation in place	Situation in current practice
Environment			
Manure disposal	Medium	Differs[2]	Most farmers receive revenues from manure
Ammonia emission	Low	No	No measures taken to limit emission
Food Safety			
Zoonosis control	Medium	Differs	Limited action
Meat-and-bone-meal	Low	No	Meat-and-bone-meal is used
Antibiotic use	Differs[3]	No	Growth promoters commonly used
GMOs	Low	No	GMOs are used
Animal Welfare			
Stocking density	Low	No	Bird densities are relatively low

In this context European producers are challenged to keep their business profitable. In the internal EU market they are facing strong competition from third country imports that do not have to comply with this extensive legislation and in addition benefit from other competitive advantages (price and accessibility of feed especially).

Even if in theory, products entering the EU market should be compliant with the EU legislation, there are several obligations for which Third countries do not have to comply with while entering the EU market. As a non-exhaustive list we could mention:

- the list of EU approved GMOs is much shorter than the one approved in third countries.

- the use of processed animal proteins (PAPs) in poultry feed is not restricted in third countries while PAPs are still forbidden in the EU (except fish meal); even intra species PAPs (poultry based feed to feed poultry) is allowed in third countries while it is strictly forbidden in the EU after a resolution from the Parliament[4] .

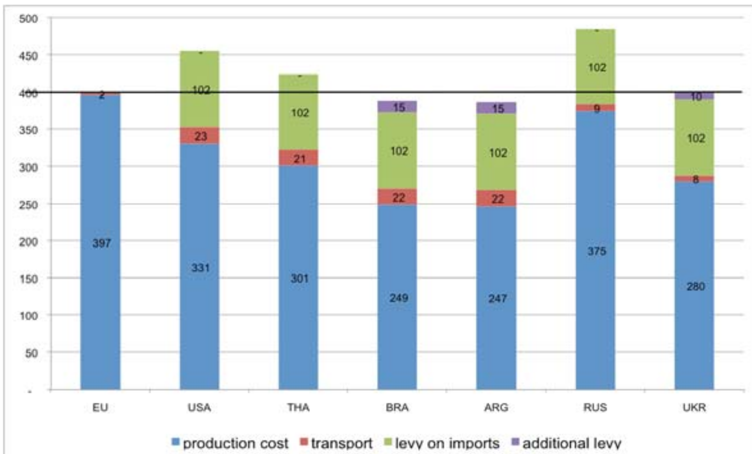
[1] http://ec.europa.eu/consumers/consumer_research/market_studies/docs/mms_commission_report_en.pdf
[2] Regulations in some regions, for example in the USA.
[3] Regulations in some countries, for example in the USA or only export oriented companies.
[4] http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P7-TA-2011-0084&language=EN&ring=A7-2011-0026

- the non-compliance with animal welfare EU rules: third countries use “equivalent” rules for the stunning requirements laid down in Regulation 1099/2009 and since the term equivalent is not well defined in the legislation, the implementation of the stunning parameters in third countries is very questionable, as noticed in the reply from the Commission to a Parliamentary question on equivalent requirements for stunning[5] .

These are just some examples of the unfair competition that EU producers are experiencing on a daily basis. In addition, the FVO, the body in charge of the inspection of the establishments that are allowed to export to the EU in third countries, regularly reports inconsistencies with the EU rules during its inspections of establishments in third countries. Unfortunately this is usually not followed by formal warnings and sanctions from the European Union, which undermines the EU producers’ position and could endanger the credibility of the European standards.

Furthermore, EU producers that want to produce poultry meat only for exports to third countries have to comply with the EU legislation and customers in third countries have a limited acceptance of the price difference for the difference in quality. To illustrate this you can see in the table below, that the offer price of breast fillet in the EU is much higher than for its main competitors:

Figure 2 Offer price of breast fillet from EU average (horizontal line) and non-EU countries in eurocents per kg of breast meat in 2011



Opportunities to remain profitable with EU standards:

Bearing in mind the issues discussed above, it is clear that EU producers are confronted with an equation that is almost impossible to solve: how to remain profitable in a globalized context while being confronted with all these competitive disadvantages resulting from restrictive EU standards?

The way out of this complex situation might be to turn this competitive disadvantage into a competitive advantage. To do so, it will be necessary to increase the awareness of EU consumers of the origin of the meat they are eating especially when the meat is imported from 3rd countries. EU producers are motivated and need to get the support from the European Union to tell consumers that the standards they are applying are the highest in the world and that the distorting practices mentioned earlier should drive the consumer choices towards EU products.

Today, the problem is that a significant part of this imported meat from 3rd countries (mainly Brazil and Thailand) is received frozen and is mostly consumed in mass catering, food services or is used in meat preparations. That means that it is impossible for the consumer to know the provenance of the meat. This is why **a.v.e.c.** members are in favour of the mandatory labelling of the origin of poultry meat in all products containing more than 25% poultry. Better information to the consumer may encourage retailers and food services to source their products from the EU.

In addition, as clearly stated by the **a.v.e.c.** study on the competitiveness of the EU poultry meat sector, the duties applied on third country imports are legitimized by the differences in the standards that are imposed on producers as explained above. If the authorities cannot guarantee that the standards for imports are the same as those for EU sourced products, duties should compensate these differences since this is the only possibility to create a level playing field.

We can also reasonably assume that consumer expectations in third countries will rise in the coming years with the development of a large middle class, more educated and probably more sensitive to issues such as environmental protection or animal welfare as is already the case in the EU. Therefore the EU producers will be able to benefit from their higher standards to meet these expectations, while third countries producers will have to make costly investments to adapt their methods of production.

Finally, the EU poultry meat industry, despite its competitive disadvantages, has a great capacity to innovate and to develop new products to differentiate themselves from competitors in third countries. The promotion of the sector in the internal and external market will also play a role to maintain and develop market shares in the EU.

To conclude, EU producers will have to defend their interests and reinvent themselves by both serving their existing markets effectively and working to be more efficient in order to fulfill the expectations and challenges of changing world markets. EU producers will have to be active leaders in these changes, and not followers of the initiatives of others.

References:

•http://ec.europa.eu/consumers/consumer_research/market_studies/docs/mms_follow-up_study_2012_en.pdf
• http://www.avec-poultry.eu/communications-position-papers

[5]http://www.europarl.europa.eu/sides/getAllAnswers.do?reference=P-2014-003878&language=EN

ANIMAL WELFARE AND HEALTH

"Animal, plant and control package: Smarter rules for safer food"

The Healthier Animals and Plants for a Safer Food Chain package[1] comprises five inter-connected proposals: a recast of Regulation 882/2004 on Official Food and Feed Controls[2], reviews to modernise Animal Health and Welfare through the new Animal Health Regulation[3], Plant Health and Plant Reproductive Material legislation as well as a Financial Framework proposal which rationalises the existing framework[4] for EU funding of the four other proposals.

In May 2014 the European Council adopted the Financial Framework[5], a regulation laying down provisions for the management of expenditure. This adoption follows a first reading agreement with the European Parliament on 2 April 2014.

As regards the Animal health, plant health and official controls proposals, after the adoption of the legislative text in first reading by the European Parliament in April 2014 the Greek Presidency presented a progress report to the Agri-fish Council and transferred the competence of the dossier to the Italian Presidency, which has taken over the responsibility to decide on the delegated acts and the list of diseases and species in cooperation with the rapporteurs of the European Parliament.

The legislative package reflects the priorities of the European call for Smart Regulation by aiming to simplify the existing legal framework leading to better coordination and avoiding any inconsistent or ineffective measures. **a.v.e.c.** welcomes the decision to maintain the animal health scope and focus of the proposal. It should be avoided that other topics already covered or likely to be covered by other legislation should be included in the animal health legislative set. This confirms that simple regulation enables efficient and effective measures and implementation.

a.v.e.c. is of the opinion that by means of a wide range of measures including vaccination, testing of animals and compensation for slaughtering and culling it will be possible to obtain a progressive elimination of a number of listed animal diseases which are endemic in certain areas of the EU. Meanwhile, regarding the Official food and feed controls proposal, **a.v.e.c.** is concerned about the lack of an incentive for officials to organise and execute the controls in an effective and efficient way since the proposals allow for 100% cost recovery.

Commission Animal Welfare Strategy 2012-2015

In February 2014 the European Commission organised a conference on the achievements of the EU Strategy for the welfare of animals 2012-2015. The Commission presented the successes and challenges on four major themes: farming, transport and enforcement, food quality, education and training. Once again the key message is that "everyone is responsible!". Some of the steps in the current Commission roadmap are a focus on the action plan against antimicrobial resistance, the publishing of a study on ritual slaughter and the launch of the EUWelNet pilot study on the European network of reference centers for animal protection and welfare.

From a global perspective animal welfare issues are becoming more and more important, also in trade negotiations following a landmark ruling by the World Trade Organisation[6]. Consumers' and media attention seems to care more and more about the way in which food is produced including animal welfare.

a.v.e.c. has been involved in several projects on animal welfare in particular dealing with labelling and transport. Guidelines and best practices based on the experience of professional operators and on internationally agreed and science based principles have been discussed and developed. Meanwhile the identification of sustainable indicators for animal welfare shall take into account the complexity of other EU regulations as regards environment and food safety issues.

The EU should aim to defend its higher standards developed over time by ensuring equivalent and effective audit mechanisms for animal welfare and in particular for imported products. Cost conscious consumers should be informed about high welfare production methods and their costs. Meanwhile food business operators should establish, in cooperation with the EU and international institutions, simpler and harmonised indicators to create a stable and effective level playing field.

The implementation of the Regulation 1099/2009

The Council Regulation (EC) 1099/2009 on the Protection of Animals at the Time of Killing came into force on 1 January 2013. It is aiming to protect the welfare of animals kept for food, wool, skin, fur or other products at the point of slaughter or killing. It also applies to killing for depopulation and to slaughtering animals during an epizootic disease outbreak. a.v.e.c. is closely following the implementation of this important Regulation in the European market. Meanwhile particular attention has been paid by the Parliament to the complete implementation of the Regulation. Parliamentary questions have been tabled on the definition of equivalent stunning requirements applied in third Countries and the assessment of the procedure of equivalence with EU standards. The EFSA opinion on electrical requirements for poultry waterbath stunning equipment that is assessing a

[1] Background http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202763 andhttp://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0169(COD)

[2] http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202628 and http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0140(COD)

[3] http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202630 and http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0136(COD)

[4] http://eur-lex.europa.eu/legal content/EN/TXT/PDF/?uri=OJ:L:2014:189:FULL&from=EN .The funding is in line with the provisions of the Financial Regulation and links to the Multiannual Financial Framework (MFF) 2014-2020 negotiations in relation to the overall EU budget.

[6] http://www.wto.org/english/tratop_e/dispu_e/cases_e/ds400_e.htm

study from Brazil is not favorable. The opinion shows how critical the enforcement of equivalent stunning methods used in third countries is. EFSA observed that the methodology and the data reported do not provide conclusive evidence that the combination of the proposed electrical frequency and current induced unconsciousness without exposing the chickens to avoidable pain and suffering. Further, some chickens did not remain unconscious for a sufficient time to prevent avoidable pain and suffering during slaughter.

The European poultry industry is currently ensuring that standards are properly implemented and enforced. The Commission has the key role to ensure that products entering the EU from third countries are compliant with at least the legally imposed conditions, to create a better level playing field and to enhance the value of standards which are mandatory for European producers.

In the past years FVO and DG SANCO undertook a substantial number of audits in all areas of animal welfare. The Commission is addressing the issues found following the recommendations of the Parliament, i.e. with guidance documents and participating in Better Training for Safer Food (BTSF)[7] training sessions. The FVO audits reported that there is a general compliance with the requirements laid down by the Regulation but nevertheless some critical points must be monitored such as compliance with minimum electrical currents used for stunning. On national level Member States, worked with the Commission to improve the level of compliance and the implementation.

The monitoring of (un)consciousness and death of the animal during slaughter is also prescribed. Following a request from the European Commission, the Panel on Animal Health and Welfare delivered scientific opinions on monitoring procedures at slaughterhouses for different animal species, stunning methods and slaughter without stunning. In December 2013 EFSA published the scientific opinion on the assessment of consciousness in poultry after stunning with electrical waterbath or gas mixtures and the assessment of death in poultry during slaughter without stunning[8] . The opinion identifies measures and "toolboxes of welfare indicators" for developing monitoring procedures at slaughterhouses. The animal welfare officer will have to employ a mathematical model for the sampling protocols with set threshold and sampling size, in order to have a more consistent estimation of threshold failure rate. The Commission deems the EFSA opinion gives sufficient tools to the competent authorities in the member states and the food business operators to implement and apply the requirements in the regulation. The Commission has not planned to give further guidance to the member states.

Appropriate use of antimicrobials

There seems to be scientific consensus that an important contributor to human antimicrobial resistance (AMR) is poor human use of antibiotics; meanwhile according to the EFSA-ECDC European Union Summary Report on antimicrobial resistance[9], AMR remains commonly detected in bacteria in humans, animals and food. That's why a prudent and responsible use of antibiotics is crucial, not only in animals, but also in humans.

With today's lack of success in developing new alternatives to antibiotics and the complex but improving international cooperation in addressing serious cross border and global health threats, the fight against antimicrobial resistance remains a priority for the European Union.

a.v.e.c. is pro-actively supporting initiatives that favour quality schemes, biosecurity measures, good husbandry systems of production and supply that use minimal antimicrobials for therapeutic reasons and to promote animal health and welfare. A critical attitude to the biosecurity situation especially on farm is essential. **a.v.e.c.** is committed to cooperate with the European Commission on this issue and is willing to cooperate in the developing of best practices and guidelines. **The EU poultry industries** presented a proposal for a 4 point action plan followed by 8 recommendations to ensure a prudent use of antimicrobials in food producing animals. The industry will implement a system to collect and monitoring data and to develop benchmarking actions; **a.v.e.c.** believes that sampling and testing methods should be defined at EU level and should cover methods for sampling and testing in humans as well as in animals.

Having said that, **the European poultry sector** is willing to continue its commitment to maintain the effectiveness of antimicrobials in human medicines, which it has already demonstrated by:

1. Restricting the use of third and fourth generation cephalosporins in the European poultry meat and egg production chain and not using them in hatcheries for chicks placed on the internal market.
2. Restricting the prophylactic use of all quinolones for day old chicks.
3. Reviewing the use of all antimicrobials during production with the objective to reduce the usage.
4. Working with governments on options to survey ESBL/Amp-C prevalence in Member States and the EU.

[7] http://www.foodinfo-europe.com/about
[8] http://www.efsa.europa.eu/en/efsajournal/pub/3745.htm
http://www.efsa.europa.eu/en/supporting/pub/541e.htm
[9] http://www.efsa.europa.eu/en/efsajournal/doc/3590.pdf

FOOD AND FEED SAFETY

REFIT general food law

In 2013 the rolling Regulatory Fitness and Performance Programme (REFIT)[1] was launched by the European Commission to strengthen its various smart regulation tools and make EU law lighter, simpler and less costly.

In 2014 the Commission started to work on evaluations and Fitness Checks in areas such as the General Food Law (EU) N° 178/2002[2] by identifying opportunities to reduce regulatory burdens and ensuring that EU action is effective.

Even though some important regulations linked to the food law framework such as the hygiene package and the Regulation 882/2004 on official controls are currently under review, the Commission also started the evaluation of the General food law, and stakeholder consultations (advisory group on the Food Chain and Animal and Plant Health and ad hoc working group) have been organised.

a.v.e.c. welcomes the Commission commitment to assess if the legislative framework is still "fit for purpose", and actively participated to the consultations regarding the implementation of Regulation 1169/2011[3] on Food information to Consumers (main provisions will apply by the 13th of December 2014), the implementation and guidance of the Standard operating procedures of the Rapid alert system for food and feed (RASFF)[4] and DG SANCO/FVO project on HACCP[5].

The new EU Regulation 1169/2011 on the provision of food information to consumers changes the existing legislation on food labelling including:

- Mandatory nutrition information on processed foods;
- Mandatory origin labelling of unprocessed poultry meat;
- Labelling according to the quantity of certain ingredients as a percentage of the final product (Quantitative Ingredients Declaration - QUID)- Guidelines for implementing the QUID[6]; labelling of engineered nanomaterial and trans fatty acids;
- Other requirements on information on allergens also cover non pre-packed foods including those sold in restaurants and cafés;
- Better legibility i.e. minimum size of text;

a.v.e.c. will continue to closely follow the work of DG SANCO in this area and will contribute to the development of policy where it is in member's interests. An interesting and very important matter is the question about the meat content and the position of mechanically separated meat in connection with the interpretation and implementation of the definition of mechanically separated meat in the hygiene regulations (Regulation 853/2004 and Regulation 2074/2005).

Review of Hygiene Package and Revision of Meat Inspection - state of play

2014 is a transitional year with the European Parliament elections and a new Commission College which should be established by the end of 2014. However, the European Commission is keen to present the outcomes of the revision of the Hygiene Package and Meat Inspection during the Italian Presidency semester.

The Report from the Commission to the Council and the European Parliament on the experience gained from the application of the hygiene Regulations, Reg. (EC) No 852/2004 of the European Parliament and of the Council, Reg. (EC) No 853/2004 and Reg. (EC) No 854/2004 of the European Parliament and of the Council found widespread difficulties and called for a revision of the meat inspection process in particular.

a.v.e.c. is strongly supporting the idea of developping a new "approach" on poultry meat inspection in order to fully address the most relevant biological hazards to public health. The poultry sector is a highly integrated sector and the poultrymeat chain is usually managed by one of the partners in the chain, which usually also manages the slaughterhouse. This means that a lot of data is available as basic information in the food chain information system and it is likely that the Commission, taking into account the food business operators' position, may define a harmonised and efficient data collection system for the sector.

[1] REFIT Programme: http://ec.europa.eu/smart-regulation/refit/index_en.htm
[2] http://eur-lex.europa.eu/legal-content/EN/ALL/;ELX_SESSIONID=QfCXT7wQ14SpD2JrXxQfvpLhpT9WZxynLb7GsJ7cJJzfcYjMtrxb!-1013812632?uri=CELEX:32002R0178
[3] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF
[4] http://ec.europa.eu/food/safety/rasff/index_en.htm
[5] http://ec.europa.eu/food/fvo/inspectprog/prog_audit_2014_en.pdf
[6] http://ec.europa.eu/food/food/labellingnutrition/resources/fl02_en.pdf

a.v.e.c. is of the opinion that risk based interventions and a harmonised food chain information between farms and abattoirs could lead to a modernization of the system. The Commission is actually working on the development of a food chain information system for pigs which may be available on Traces (Trade Control and Expert System) and might give inspiration to the **a.v.e.c.** working group on poultrymeat inspection.

"Control package: Smarter rules for safer food"

The on-going revision of the Official controls legislation provides that national authorities should have an obligation to collect fees from all food business operators, in order to recover the costs of official controls.

In the past years the poultry sector has shown that the food business operators are willing to invest in their own satisfactory checks and controls by employing on line inspectors supervised by the official inspectors. This positive commitment should be take into account by the legislator while defining a more efficient and (cost) effective system.

In particular, as underlined by the "Study on fees or charges collected by the Member States to cover the costs occasioned by official controls", the principle that only official veterinarians can carry out audits and inspections of slaughterhouses, game handling establishments and certain cutting plants (requirements of Regulation 854/2004) should be reviewed. This requirement is considered to impose high costs. If this requirement was to be relaxed for food business operators who are fully committed to their responsibility to bring on the market safe poultry meat according to the legal requirements, it could lead to more effective and cost-efficient controls.

Campylobacteriosis

In May 2014 DG SANCO organised a workshop on campylobacter control measures. The workshop provided an update on the latest scientific outcomes and projects to combat campylobacter and the state of play throughout Europe.

Speakers from EFSA and ECDC explained that according to the last annual report on zoonoses and food borne outbreaks 2012, Campylobacter is the most common cause of human zoonosis, it has a significant impact on food safety and public health and poultry is considered a major source of human campylobacteriosis.

During the discussions **a.v.e.c.** stressed the importance of developing a harmonised approach and a level playing field in the EU. There is a clear need for risk-based interventions coupled with improvement in data communication (better knowledge and understanding of ongoing research projects).

a.v.e.c. also underlined the importance of focusing not only on the slaughterhouse for finding a solution, but that also on farm level interventions need to be made since the farm closely linked to the 'poultry reservoir'. Both officials and stakeholders should not neglect this as part of a sustainable solution.

Peroxyacetic- acid

According to the EFSA scientific opinion published on the 26th of March 2014, the use of substances containing peroxyacetic acid (PAA) to reduce contamination from pathogens on poultry carcasses and meat would not pose toxicity concerns. EFSA's experts also conclude that it is unlikely that the use of PAA would lead to the emergence of resistance to antimicrobials and reduced susceptibility to biocides.

In the framework of the TTIP negotiation, **a.v.e.c.** is concerned about high volumes of US poultry meat entering the EU market produced under standards not complying with the EU rules.

a.v.e.c. strongly supports the Commission decision to retain EU food safety standards. The precautionary principle and the approach "from farm to fork" developed by the European Union and backed by substantial investment, were made to guarantee food safety without antimicrobial treatment (AMT).

The European Union has food safety standards that are among the highest in the world and should not fear that a mutual equivalence principle would allow US food exports produced to different standards to be sold on the EU market.

The European poultry industry stands strongly behind the EU "from farm to fork" policy which should not need the introduction of pathogen reducing treatment and reminds once again that good biosecurity measures at farm level and proper hygiene and handling throughout the total food chain, including the consumer, are essential in producing and preparing safe food. Decontamination treatments should not be used as final backstop, when there is no need for these pathogen reduction treatments, since this will undermine the achievements made on food safety and consumer protection.

Processed animal proteins (PAPs)

a.v.e.c. is waiting for the re-authorisation of processed animal and more specifically poultry protein since the feed ban installed in 2001.

a.v.e.c. strongly supports the Commission's intention to enhance the feed value and safety of processed animal proteins which constitute a complete feed ingredient that delivers valuable fats and minerals.

[7] Document COM(2009) 403: http://ec.europa.eu/food/food/biosafety/hygienelegislation/docs/report_act_part1_en.pdf

[8] Regulation (EC) No 852/2004 of the European Parliament and of the Council of 29 April 2004 on the hygiene of foodstuffs (OJ L 139, 30.4.2004, p. 1).

[9] Regulation (EC) No 854/2004 of the European Parliament and of the Council of 29 April 2004 laying down specific rules for the organisation of official controls on products of animal origin intended for human consumption (OJ L 139, 30.4.2004, p. 206).

[10] http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202628 and
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0140(COD)
http://ec.europa.eu/food/food/controls/inspection_fees/docs/external_study_en.pdf
http://www.ecdc.europa.eu/en/publications/Publications/EU-summary-report-zoonoses-food-borne-outbreaks-2012.pdf

[11] http://www.efsa.europa.eu/it/efsajournal/doc/3599.pdf
http://ec.europa.eu/environment/circular-economy/pdf/circular-economy-communication.pdf

MARKETING STANDARDS – LABELING OF POULTRYMEAT

Marketing standards:

After the adoption of the Common Agricultural Policy package, the European Commission (DG AGRI) will start with the review of the connected legislation. For the poultry meat industry the review of Commission Regulation 543/2008 of 16 June 2008 laying down detailed rules for the application of Council Regulation (EC) No 1234/2007 as regards the marketing standards for poultry meat is the most important.

After having sent a first proposition in 2012 to the Commission, **a.v.e.c.** has updated its recommendations following the consultation of its members. Our suggestions particularly concern the definitions, the chilling methods, the origin labelling and the requirements, registration and record keeping applying to different types of farming. **a.v.e.c.** also advocates that the Commission should do its utmost to avoid that the future marketing standards may obstruct the introduction of new technologies that may improve the safety and quality of poultry meat. The process of revision will be initiated in 2014 after summer and **a.v.e.c.** will actively follow the dossier and make sure that the voice of the European poultry industry will be heard.

Origin labelling

Origin labelling has been one of the main issues in the revision of the EU rules on food labelling, which resulted from the adoption of Regulation (EU) No 1169/2011 on food information to consumers. Regarding the labelling of fresh poultry meat the new regulation has been passed and will apply from April 2015[1], while for poultry meat used as an ingredient the discussions between the 3 institutions are still ongoing. In addition, the labelling of relevant information for stunning is under consideration.

Mandatory labelling of fresh poultry meat

The new legislation introduces the mandatory labelling of the place of rearing and slaughter for fresh poultry meat indicating the name of the Member State for each step and "third country" in the case that animals are reared and/or slaughtered outside the EU. Animals born, raised and slaughtered in the same Member State or third country can be labelled with the terms "Origin: Member State (or third country)".

The new legislation has been passed by a qualified majority of Member States in the Standing Committee on Food Chain and Animal Health despite some protests in the European Parliament that would have preferred the "beef model" with the labelling of the place of birth, rearing and slaughtering.

A detailed set of rules adapted to each type of production has been published in order to guarantee that the place of rearing is in fact where the animal spent a substantial part of its life. Exemptions or derogations have been made for minced meat and trimmings.

The new Regulation will apply from 1 April 2015, so as to allow the agri-food sector to adapt.

Labelling of meat used as an ingredient:

On 17 December 2013, the Commission (DG SANCO) presented a report to the European Parliament and the Council regarding the mandatory indication of the country of origin or place of provenance for meat used as an ingredient. In this report the Commission notes that it does not intend to propose legislation and will wait for the recommendations of the Council and Parliament before taking any action. The report highlights the "overall strong consumer interest in origin labelling", but explains that it is not reflected in consumer "willingness to pay". Discussions have started in the Council and there are diverging views among the Member States as regards the scenarios discussed in the report. The newly elected European Parliament will start the discussions in the second part of 2014. **a.v.e.c.** will continue to follow closely the discussion in both European Parliament and Council.

Labelling of relevant information for stunning:

DG SANCO has mandated the consultancy AGRACEAS to prepare a study on the need to provide information to consumers as regards the stunning methods (the basis of this is recital 50 of Regulation 1169/2011). The aim of the study would be to consider the need to provide consumers with relevant information on the stunning of animals. The study is expected to be finalised by October 2014 and the Commission has confirmed it will wait for the result of this study before making any legislative proposal in 2014. Religious slaughter is a hot topic in several member states and creates tensions between animal welfare groups and religious communities. In Denmark, a ban on religious slaughter without stunning came into force mid-February and the country joined Poland on the list of MS that have already

[1] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2013.335.01.0019.01.ENG

a.v.e.c. members are opposed to the labelling of stunning methods because it would be more relevant that consumers can be confident that stunning is done properly than to know by which method the animal is stunned. If by derogation an animal is killed without stunning it should be ensured that this is happening with respect to the animal. Information on stunning methods will not be the right answer to the consumer concern about stunning.

Food additives:

The entry into force of new legislation in 2013 was in conflict with how the previous legislation had been interpreted and implemented. This has now largely been resolved since the Commission published on 4th of June the Regulation amending Annex II to Regulation (EC) No 1333/2008 of the European Parliament and of the Council as regards the food categories of meat and the use of certain food additives in meat preparations. This put an end to the legal uncertainty with regard to the use of additives in meat preparations[2]. Thanks to strong cooperation with CLITRAVI we succeeded in highlighting the specific practices linked to traditional products and the role of additives in shelf life and reducing food losses. The regulation came into force on 25th of June 2014.

UN-ECE Standards

UNECE (United Nations Economic Commission for Europe) is a multilateral platform which aims to promote economic integration. The purpose of UNECE standards for meat products is to facilitate trade by recommending a common international language for use between buyer and seller. The language describes meat items commonly traded internationally and defines a coding system for communication and electronic trade. UNECE standards already exist for chicken meat (2007), duck meat (2008), turkey meat (2010) and goose meat (2011). This year, **a.v.e.c.** contributed to the September 2013 revised version of the "Draft Standard for processed poultry meat, including ready-to-cook preparations and ready-to-eat products" and made comments especially on the definition of MSM (Mechanically Separated Meat). This version is available on the UNECE website: http://www.unece.org/agr/ge11/meatsymposium.html

The standard for processed poultry meat may be adopted in the meeting of the Specialized Section on Standardization of Meat to be held after an international meat symposium on 29 - 30 September 2014 in Geneva.

References:

Regulation 543/2008 implementing measures of the marketing standards for poultry:
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:157:0046:0087:EN:PDF
Regulation 1169/2011 on the provision of food information to consumers:
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF
Regulation 1337/2013 on the indication of the country of origin or place of provenance for fresh, chilled and frozen poultry:
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:335:0019:0022:EN:PDF
Guidance for the implementation of the rules:
http://ec.europa.eu/agriculture/newsroom/149_en.pdf
Report from the Commission on the mandatory indication of the country of origin or place of provenance for meat used as an ingredient:
http://ec.europa.eu/food/food/labellingnutrition/foodlabelling/docs/com_2013-755_en.pdf
Regulation 1129/2011 establishing a Union list of food additives
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:295:0001:0177:En:PDF
Regulation 601/2014 amending Annex II to Regulation (EC) No 1333/2008 of the European Parliament and of the Council as regards the food categories of meat and the use of certain food additives in meat preparations:
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2014:166:TOC
Regulation 1333/2008 on food additives:
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:354:0016:0033:en:PDF
Proposal UNECE standards for processed poultry meat:
http://www.unece.org/fileadmin/DAM/trade/agr/meetings/ge.11/2013/WP7_GE11_2013_08E_ProcessedPoultry.pdf

[2] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014R0601&from=EN

Turkey production in the EU is concentrated in a few member states. Five countries (Germany, France, Italy, the UK and Poland) produce more than 80 % of all EU turkey meat in 2013. Only a small number of companies in a limited number of Member States are involved in the turkey primary breeding sector. Also the consumption of turkey meat varies strongly between Member States, with the percentage of consumers ranging from 0.2 % to 70 %.

Market situation of turkeys

The high soybean prices throughout 2013 have had a significant impact on turkey production costs. These tensions had a negative impact on the accessibility of turkey products and on the production potential. The effects were particularly severe on turkey production because of its relatively high feed conversion index and secondly the high protein content in the ration.

At the European level, turkey production has broadly stabilized in 2013 and the decrease of the offer during the second half of the year has restored the stability of the turkey market. The year 2014 started with more favorable pricing conditions providing better profitability to the sector. However, prudence is needed because turkey production is more sensitive than other meat sectors to changes in prices of raw material commodities.

Attention is drawn to the falling level of consumption in many countries. The problem of the competitiveness of turkey meat is a recurring one. In 2014, a slight increase in production is expected. It may be noted that all European imports are made under tariff rate quotas, mainly from Brazil,

Turkey welfare

a.v.e.c. believes that good farming practice and good farm administration are crucial for turkey health and welfare. The wellbeing of animals is essential to society, and turkeys, like any other animals, have to be treated with care. Turkeys are kept in houses designed to guarantee their biological needs in terms of nutrition, freedom of movement, physical comfort and the need to perform natural behaviour. The turkeys are protected from adverse climatic conditions, injuries, fear and diseases. The sector is continuously looking for Improvement in feed, housing, equipment, medicines and genetic research in order to enhance the rearing conditions. Therefore, **a.v.e.c.** and COPA-COGECA have drawn up a turkey management guide for their members to promote actions that reinforce turkey welfare. This approved guide is an important reference manual for all representative professional organizations to display their commitment to provide the necessary welfare to growing turkeys.

Histomonosis assessed by EFSA

A technical meeting on Histomonosis was organized by EFSA in January 2013 to facilitate the collection of information and exchange of views (www.efsa.europa.eu/ en/supporting/pub/464e.htm).

Participants at the meeting agreed that the frequency and severity of outbreaks of Histomonosis in turkeys were increasing. Similarly, the disease in farmed chickens and laying hens, although less severe, had a significant impact on affected flocks.

This disease represents a serious and permanent health and welfare problem for the poultry population in the EU. As chemical substances are not allowed any more, and there is not yet a commercially available vaccine, participants stressed that due to economic losses and animal suffering, the disease should attract all the attention of risk managers. In addition, public health problems related to the use of chemical agents should also be addressed.

TRADE NEGOTIATIONS

The EU has started negotiations with many countries and regional entities in the world. **a.v.e.c.** is following closely these negotiations in order to promote and defend European producers' interests and to create opportunities for the EU poultry meat industry in third countries. Due to the increasing importance of trade negotiations for EU producers, **a.v.e.c.** has established a working group on trade, focusing on EU negotiations for free-trade agreements with third countries.

A.V.E.C.'S POSITION ON TRADE NEGOTIATIONS:

Safeguard of the EU production capacities:
The study conducted by LEI Wageningen for **a.v.e.c.** on the competitiveness of the EU poultrymeat sector clearly shows that the current EU regime of import tariffs allows the EU poultry industry to compete with producers in third countries where legislative or production standards do not meet the requirements or expectations of EU consumers. Further market access at reduced duties granted to countries that do not meet our standards will continue to weaken the competitive position of the EU poultry meat industry and will put at risk a sector employing more than 300 000 EU citizens. In contrast to other EU meat sectors, the poultry meat sector has already been faced with a large opening of its market with quotas at very low or zero tariff duty and imports amounting to more than 813 000 tons, which is much higher than imports of pork (34 900 T) or beef (306 675 T) in the EU.

a.v.e.c. considers that imported poultry meat from third countries should comply fully with the high EU standards of food safety and hygiene, animal health and welfare and environmental protection, in order to avoid that the principle of equivalency undermines EU standards. EU standards for poultry meat are among the highest in the world and this contributes to a higher cost level compared to competitors in third countries. We have developed in Europe a particular system based on the holistic food chain approach "from farm to fork", that gives better results in terms of microbial criteria and that is much more sustainable. The quality and safety of European poultry meat is guaranteed by interventions from the start of the production chain rather than at the end to remove contamination. It is fundamentally different from the system that is focusing only on the quality in the last stage of production during and after slaughter.

a.v.e.c. considers that import quotas should be allocated to certain tariff lines instead of granting quotas in general and leaving it to the traders, importers and exporters to decide. The single pocket approach of WTO and bilateral agreements should apply to all bilateral quotas and not only to the EU-MERCOSUR trade agreement to avoid that the designation of poultry meat as a sensitive product becomes meaningless.

Promotion of our export interests:
Due to high EU standards, **a.v.e.c.** believes that EU producers can offer products of higher quality than our competitors. We are convinced that European poultry meat, which is complying with the highest standards in terms of animal health, welfare and food safety, will perfectly match the expectations of consumers who are looking for high quality products at an affordable and reasonable price.
Almost 100% of the exports of European poultry meat derive from "conventionally farmed poultry" which is produced in an efficient way according to high European standards. In our opinion, the promotion from the European Commission of our offensive interest should not solely focus on so called "quality products" but also on conventional farming.

MULTILATERAL NEGOTIATIONS AT WTO FOR THE PREPARATION OF THE 9TH MINISTERIAL CONFERENCE IN BALI

Discussion:
The WTO's Bali Ministerial Conference concluded on 7 December 2013 with agreement on a package of issues designed to streamline trade, allow developing countries more options for providing food security, create more discipline in export competition, boost least developed countries' trade and help development more generally. The proposal on Tariff Rate Quotas administration may have an impact on our sector since it will permit more transparency in the administration of TRQs if the quotas are regularly unfilled, moving to a first come first served mechanism. Nevertheless the general impact of this package in the WTO agreement will be limited for the poultry sector and a substantial outcome coming from multilateral approach is not expected on the short/medium term.

South African import duties
The International Trade Administration Commission (ITAC) is responsible for trade remedies in South Africa. The Trade Remedies Unit of ITAC administers the trade remedies instruments through investigation of alleged dumping, subsidized imports and a surge of imports into the SACU, in accordance with domestic legislation and consistent with WTO Rules. ITAC has published in STAATSKOERANT, 25 OKTOBER 2013 No. 36951 NOTICE 1047 OF 2013 of initiation of an investigation into the alleged dumping of frozen bone-in portions of fowls of the species Gallus Domesticus originating in or imported from Germany, the Netherlands and the United Kingdom.

Our members in Germany (BVG), The Netherlands (NEPLUVI) and the UK (BPC) have been contacted by ITAC. Companies trading with South Africa were requested to reply to a questionnaire about their trade with South Africa. With the assistance of the European Commission, a.v.e.c has organized a meeting with ITAC in South Africa in order to have clarification on different matters. The concerned members were represented in the meeting. However after the meeting it became clear how problematic different nomenclature in trading countries may be since ITAC informed **a.v.e.c.** that the interpretation of which products are falling under the scope of the investigation was no longer agreed by the parties.

On the 4th of July 2014, ITAC notified a.v.e.c. that they had made a preliminary determination on the investigation concluding that products were imported into the SACU market at dumped prices, thereby causing material injury to the SACU industry concerned. As a consequence ITAC proposed to impose a 31,30 % provisional payment on 4 German companies and a 73,33 % provisional payment on all other German exporting companies. For the Netherlands, ITAC proposed a 22,81 % provisional payment for all companies except one , while ITAC advices a 22,03 % provisional payment on all UK companies exporting to South Africa. ITAC gave 15 days to the concerned parties to express their views on the dossier provided together with the communication prior to making its final determination to the Ministry of Trade and Industry.

a.v.e.c. together with its concerned members and the European Commission will analyze the dossier and will try to give the best answer to the situation.

ON-GOING REGIONAL AND BILATERAL TRADE NEGOTIATIONS

CANADA

Last year the European Union has signed a trade agreement with Canada but no deal on poultry was included in the agreement. The meat sector had to grant 50 000 tons of hormone-free beef and 75 000 tons TRQ for Canadian ractopamine-free pig meat. The Commission has indicated that this agreement will not create a precedent for the TTIP negotiations. The negotiations are not yet completely finalized and regarding the meat sector, discussions are stumbling on the management system for the TRQs.

MERCOSUR

After their suspension in 2004, the negotiations with Mercosur (Argentina, Brazil, Paraguay and Uruguay – Venezuela is not involved in the talks) were officially re-launched at the EU-Mercosur summit in Madrid in May 2010. Nine rounds of negotiation have taken place since then (the last one from 22 to 26 October 2012 in Brasilia). Brazil is encouraging its trade partners to sign this agreement to avoid that the United States dominates trade with the EU through the TTIP negotiations. However internal dissents in Mercosur appear to be slowing the negotiations. For example, Argentina seems unwilling to engage in the process. The first exchange of offers should have occurred at the beginning of this year but it has been postponed several times. The latest information suggests that Mercosur and the European Union are likely to exchange offers in July after the Football World Cup. Until now, the discussions were concentrated on the parts of the agreement directly linked to market access offers, such as tariff reduction schemes, safeguard clauses and rules of origin. Progress has been achieved on rules of origin and trade barriers. Regarding SPS issues, discussions have progressed slowly, with the Commission aiming at harmonising the rules as well as animal welfare.

a.v.e.c. has raised its concerns with the European Commission about this agreement. **a.v.e.c.** opposes a bilateral deal with Mercosur, warning that it would have a catastrophic impact on the EU poultry sector.

TTIP NEGOTIATIONS WITH THE UNITED STATES

Both EU and US parties committed to start negotiations on the TTIP (Transatlantic Trade and Investment Partnership) at the beginning of 2013. The TTIP intends to go beyond the classic approach of removing tariffs and opening markets on investment, services and public procurement. In addition, it will focus on aligning rules and technical product standards which currently form the most important barrier to transatlantic trade.

5 rounds of negotiations have passed since the start of the negotiations with the last one held in the US between 19th and 23rd May 2014. Market access offers have been exchanged in February and the EU's offer includes the full liberalisation of 96 percent of tariffs. The EU Commission has officially stated that they consider the US offer not ambitious enough and would like it to be reviewed. Poultry, as a sensitive sector, was not included in the first offer as well as other sensitive agricultural sectors (beef, pork, poultry, sugar, starch, rice, ethanol, sweet corn and some vegetables). This is still to be decided at a later stage, probably at the beginning of 2015.

At least four of the negotiating areas within TTIP are now at the level of consolidated text-based discussions. These four areas are technical barriers to trade, competition, state-to-state dispute settlement, and small and medium enterprises. Negotiators have explained that proposed agreement wording is being discussed in many other TTIP areas (sustainable development, labour, environment,…), with text-based discussions hoped-for in the near future. Strong political support from the US (Obama) and the EU (EP, Commission and heads of state) has been expressed with the objective being to conclude the deal by 2015.

Regarding transparency, the Commission has set up a specific expert group to advise the EU chief negotiator on these negotiations, with representatives from COPA COGECA, FoodDrinkEurope and BEUC. **a.v.e.c.** participates in all civil society meetings to get latest information on the TTIP negotiations. The Commission has launched an ISDS (Investor State Dispute Settlement)

consultation to collect views from stakeholders on this mechanism. Investor-state dispute settlement (ISDS) is an instrument of public international law that grants a foreign investor the right to initiate dispute settlement proceedings against a foreign government using arbitration. Both partners seem to have sufficient national jurisdictions to protect foreign investors and **a.v.e.c.** questioned in the consultation whether such a mechanism is needed in this particular agreement.
In these negotiations, **a.v.e.c.** has warned the Commission that the EU food chain approach "from farm to fork", which gives better results in terms of microbial criteria and is much more sustainable than the American system, should not be jeopardised. Linked to that point, we believe that any market access granted to the US cannot be agreed without agreement to this and all other SPS issues.

a.v.e.c. has also repeatedly informed the Commission that the use of ractopamine, and other growth promoters should not be accepted and that the same requirements in terms of animal welfare and environmental aspects must be imposed on US producers in order to have a fair and level playing field. **a.v.e.c.** and its members work together with European and national officials and politicians to ensure that the interests of the poultry meat producers will continue to be defended in these negotiations.

CHINA

At the end of 2013, negotiations with China were launched, but the scope of this proposed agreement is not as broad as a free-trade agreement. The negotiations mainly concern how to better protect investments made by EU industries in China and vice-versa. Nevertheless, the signature of such an agreement may be a positive sign towards starting FTA negotiations with China in the future. At the same time the Commission is negotiating an agreement with China on the Geographical Indications of products. After 9 rounds of negotiations so far the process might be concluded by the end of the year 2014.

INDIA

Negotiations were launched in June 2007. After 11 full rounds, the negotiations have been put on hold due to general elections in India. The last negotiation meeting took place on 15th April 2013 in Brussels. The Commission will have now to evaluate whether the newly elected government is willing to engage in the process of completing the free-trade negotiations in the coming weeks/months.
Concerning poultry, **a.v.e.c.** has advocated for better market access in the country. However, India seems to be maintaining its defensive position.

JAPAN

The negotiations started in March 2013 and 5 rounds of talks have taken place so far with the last round held in early April 2014 in Tokyo. As foreseen in the negotiation mandate, the Commission has presented to the Council the results of the first year of negotiations. After that presentation, the Council has given its green light to the Commission to continue the negotiations with Japan.
First market access offers have already been exchanged. Agriculture is very sensitive for Japan and they are very cautious in terms of full liberalization. In the course of the negotiations, Japan's Ministry of Agriculture has signalled that poultry is also considered sensitive because of the EU export capacities. Japan is also negotiating at the same time a free-trade deal with the US, the TPP (Transpacific Partnership) which may interfere with the EU negotiations. Regarding SPS issues, they are part of the negotiations and the Commission already achieved a number of important improvements. **a.v.e.c.** has transmitted its interests in taking an export orientated approach regarding poultry meat in these negotiations with Japan.

MALAYSIA

The negotiations were launched in Brussels in October 2010. The seventh round of FTA negotiations took place in Brussels in April 2012 and was followed by meetings of Technical Working Groups in Kuala Lumpur in September 2012. The Commission explained that they have reached the half-way point of the negotiations. Following general elections that took place in May 2013 in Malaysia the discussions should resume but the negotiations are not expected to restart before the summer break. **a.v.e.c.** has warned the Commission about the interests of the poultry sector in these negotiations, also with regard to "Halal" requirements. Malaysian authorities have signaled that poultry is a sensitive product.

THAILAND

The talks were officially launched in March 2013 and 4 rounds have taken place so far. The last meeting took place on 8-10 April 2014 in Brussels but no exchange of offers has yet been made. The political situation in the country has forced both parties to put the negotiations on hold. With the recent army coup d'état, the situation is likely to remain blocked and no progress should be expected in the coming weeks/months. The Commission will try to reinstall contact with their Thai counterparts in September this year. It is clear that any future trade agreement is important for the European poultry sector. In the interest of the European poultry industry the Commission should be critical of the impact of any offer on market access for poultry as Thailand is already the second largest importing country for poultry meat.

VIETNAM

The negotiations have entered a substantive phase now that 8 rounds have already been held. Both sides aim rapidly to conclude this free-trade deal. Market access offers were exchanged in June last year but nothing has been exchanged since then. The EU agricultural sector has both offensive and defensive interests and poultry is considered as a sensitive product by Vietnam. **a.v.e.c.** has expressed its export interests to the Commission regarding Vietnam while remaining vigilant on rules of origin.

The negotiations are advancing quite rapidly and a possible conclusion can be expected before the EU/ASEAN summit in October 2014.

EASTERN PARTNERSHIP:

Regarding Belarus, Azerbaijan and Armenia, there are no opportunities since these countries have chosen to be part of the Russian Custom Union.

Regarding Georgia and Moldavia, their agreement with the EU has been signed on 27th of June 2014. This agreement is more than market access since it will lead to a regulatory convergence with the EU legislation to improve the competitiveness of the countries.

UKRAINE

After the political upheaval in Ukraine, the Commission has decided to adopt a proposal to temporarily remove customs duties on Ukrainian exports to the EU in order to help stabilize Ukraine's economy. In this provisional agreement, Ukraine benefits from all the concessions that had been negotiated in the DCFTA (Deep and Comprehensive Free-Trade Agreement) before the start of the Ukrainian crisis. For the poultry meat sector it contains a duty free TRQ (Tariff Rate Quota) of 20.000 tons for frozen poultry carcasses (all expressed in net weight) and 16.000 tons poultry meat and poultry meat preparations with a linear increase in 5 years' time to 20.000 tons. Other more sensitive products such as cereals, pork and beef have been granted duty-free TRQs.

These measures are temporary and imports need to take place before 1st of November 2014. Ukraine and the European Union have signed the full text of the DCFTA on 27th of June 2014. It will allow, in addition to the measures currently in place, reciprocity measures to apply with TRQs of 8.000 - 10.000 tons for poultry meat and an additional quota of 10.000 tons for frozen carcasses (all expressed in net weight) to be opened by Ukraine for the EU producers.

Once the comprehensive free trade deal enters into force, these TRQs would rise over a transition period. The duty cuts also include safeguards to prevent abuse from 3rd country exporters using fake Ukraine certificates. A system of licenses managed by DG AGRI will be chosen to manage the TRQs for imports in the EU.

a.v.e.c. has drawn the attention of the Commission to several competition distorting practices in Ukrainian poultry production. The Commission should be extremely vigilant that Ukrainian products entering the EU are complying with the EU requirements in terms of food safety, animal welfare, quality standards (water content) and environmental impact. Finally, attention needs to be paid to the financing of the poultry production by subsidy and tax schemes that might be not compliant with the agreement.

SOUTHERN MEDITERRANEAN COUNTRIES

The EU Council has adopted in December 2011 negotiating directives for DCFTAs for 4 Southern-Mediterranean countries: Morocco, Tunisia, Egypt, Jordan. With Egypt and Tunisia, there is currently no dialogue and the Commission is waiting for more political stability. With Morocco, negotiations were launched on 1st of March 2013 but agriculture will be out of the negotiations since an agreement already exists with the country. With Jordan, the scoping meetings have taken place and there is a political will on both sides to launch negotiations.

ALREADY AGREED TRADE NEGOTIATIONS

ANDEAN (COLOMBIA, PERU)

The EU and its Andean partners – Colombia and Peru – finalized the negotiations in 2010. Following the necessary procedures on both sides, including an approval by the EU Council and the European Parliament, trade provisions of the agreement have been provisionally applied with Peru as of 1 March 2013 and with Colombia as of 1 August 2013. A duty free quota of 7.500 tons for poultry from Peru into the EU with and annual increase with 750 tons has been agreed.
The 3rd round of negotiations took place with Ecuador from 09-13 January 2014 in view of Ecuador's potential accession to the Agreement. The EU is also discussing whether Bolivia can be integrated into this agreement.

SINGAPORE

The agreement was signed in December 2012. Singapore already autonomously applies zero MFN duties on the vast majority of imports among them agricultural products. In any case both parties have agreed to eliminate virtually all tariffs at the latest five years after the entry into force of the FTA. Important attention has been given to rules of origin to avoid the EU to be the target of large imports originating from other Asian countries. The draft agreement will now have to be ratified by the Council of Ministers and the European Parliament. The implementation of the agreement is expected to start by the end of 2014.

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PERSPECTIVES ON POULTRY WORLD MARKETS (2014-2023)

Global agriculture projections for 2014-2023

2013 and 2014 have seen a significant drop in prices of the most consumed crops due to bumper harvests in the world main producing regions. In stark contrast, dairy and meat product prices are historically high, mainly due to lower production than expected. Demand for agricultural products will continue to be strong, but will grow at a slower pace than in the past decade. Urbanisation and a change in eating habits will lead to an evolution towards higher protein, fats and sugar diets. Livestock and biofuel production will grow at a stronger rate than crop production. Consequently there will be a shift towards coarse grain and oilseeds to the detriment of staple food crops such as wheat and rice, in order to meet the demand. The additional production will be located in regions where factors of production such as land and water are easily available, mainly Asia and Africa.

Global meat sector perspectives

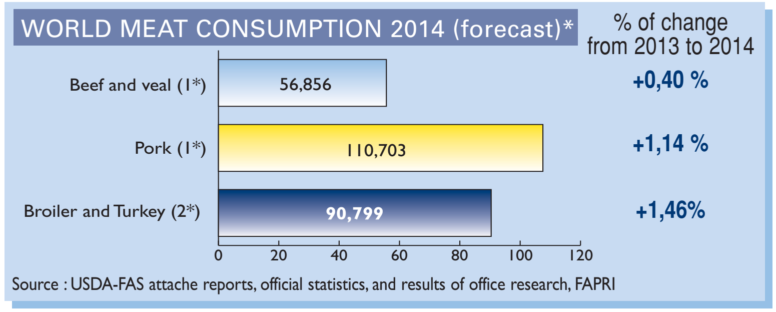
Since 2011, meat prices have reached historical high levels mainly due to the increase of the feed costs that have doubled in the last decade. Market growth is driven by higher consumption in emerging countries while at the same time demand is stagnant or even declining in OECD countries.

Nominal meat prices are expected to remain strong since inputs (feed, energy, labour and land) are expected to remain at high levels. Nevertheless, in real terms meat prices will reach a peak and might start to decline by 2023.

Global meat production is predicted to rise by 1,6 % over the outlook period, with poultry becoming the largest meat sector by 2020. The consumption of meat is expected to amount 36.3 kg in 2023, an increase of 2.4 kg compared to the current consumption, with poultry contributing almost 3/4 of the growth. The trade of meat will continue to rise but at a slower rate and will mainly originate from Asia which will account for the biggest share of extra imports during the period.

Global Poultry production projections

This year, global poultry meat production rose by 0,5 %, the slowest growth rate over the past 20 years. It was mainly caused by falling production in China and the loss of confidence of the consumers after the avian influenza H7N9 outbreak. Poultry meat production will rise by 28,3 MT during the period 2014-2023 representing almost 50 % of the additional production of all kinds of meats. However production will grow at a slower rate than in the past decade. The report highlights the advantages of poultry over other meat sector, namely that production does not need large land areas and can be situated close to large customer bases or urban centres. The short production cycle permits quick adaptation to the market, and good feed conversion ratio leads to lowest production costs. These characteristics are contributing to the growth, especially in countries that benefit from low feed grain prices. Asia will be the fastest growing market and any growth in poultry meat production will depend on the capability of the sector to control disease issues.

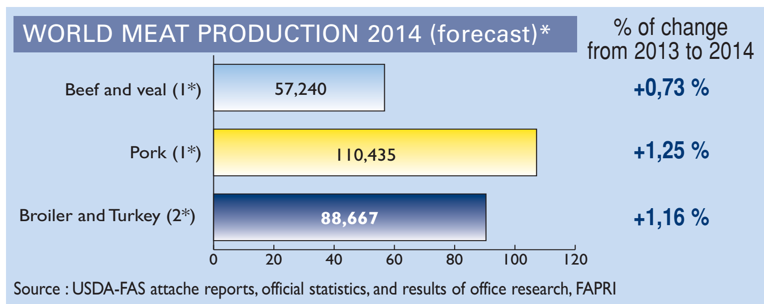


Poultry consumption projections

Growth in meat consumption will be driven by consumer preferences together with disposable income and population growth. Given that poultry meat is the most affordable meat and free from religious barriers, these drivers are clearly supporting the high demand for poultry compared to the other types of meat. Out of all available meats, poultry is the meat that has most robust growth even in developed countries where the trends seems to suggest a decline in meat consumption.

83 % of the increase in meat consumption will come from developing countries with 50% coming from Asia. Over the reviewed period, poultry meat is predicted to overtake beef meat as the most consumed meat in Africa.

In total poultry meat consumption will rise by 27 % through 2023 after stagnating in the previous decade. Due to its affordability, poultry meat consumption per capita in the US is expected to increase from 51 kg to 57 kg. In China, consumption of pork is close to saturation levels which will benefit alternative sources of proteins, such as poultry. The larger consumers of poultry meat per capita (Malaysia, Israel and Saudi Arabia), are located in countries where pork is not eaten due to religious restrictions.

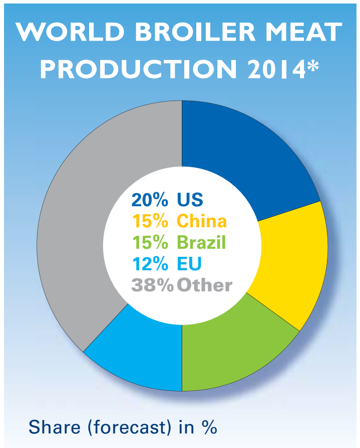


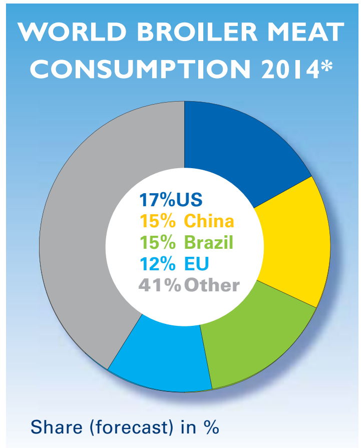
1* 1.000metric tonnes (carcass weight equivalent)
2* 2.000 metric tones (ready to cook equivalent)
*2014 April estimates

Poultry projection in trade

The development of trade in the meat sector is expected to outpace production growth although it will increase at a slower rate than the previous decade. The EU, faced with a strong euro and strict animal welfare rules, is expected to weaken its position as a leading world exporter while South and North America will account for 60 % of the additional shipments. Ukraine is also expected to become a major exporter of poultry meat with a substantial increase in its production, especially towards Europe, unless political unrest prevents this growth.

Russian Federation's net importer position is predicted to reduce considerably after the country's effort to increase its self-sufficiency in meat. Poultry will account for over half of the additional total meat traded with additional exports originating mainly from America (North and South). The most important importers of poultry meat are Asia, Middle East and North Africa.



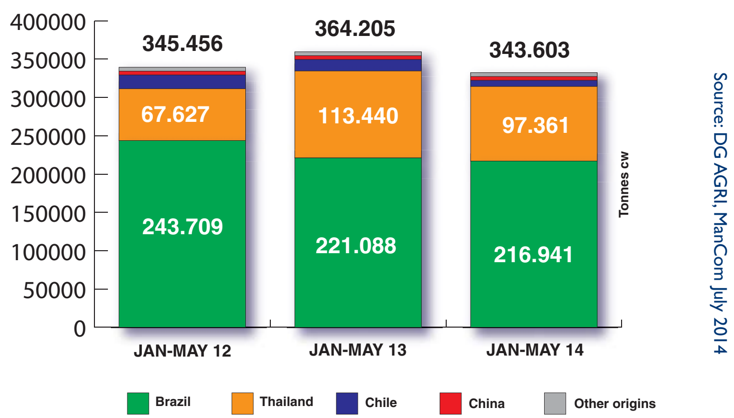


* 2014 April estimates

Main issues and uncertainties for EU poultry meat trade

- Per capita consumption as well as population growth is stagnant in the developed countries, while production is predicted to increase. This will necessitate the development of new export markets in developing countries where consumption is predicted to develop at a very high growth rate, but where disposable income may be lower than the EU average.
- This outlook is subjected to uncertainty regarding disease outbreaks in the meat sectors which may disturb national and international markets since interdependency has increased over time. Different types of outbreaks could be listed:
    - the ones having an impact on the flock forcing the culling of the animals
    - the ones having an impact on consumer confidence and or human health and causing a sudden decrease in consumption. An example of that is the outbreak H7N9 in China, resulting in a significant drop of poultry meat consumption creating a shift to other proteins such as red meat.
- The possibility of reaching several trade agreements within the next decade may be a factor in an increase in the meat trade. The EU has reached an agreement with Canada that does not include poultry meat and is currently negotiating with the United States, Mercosur and Thailand who are major poultry meat exporters. An outcome of the TPP (Trans Pacific Partnership) between the US and 11 countries in the Pacific region (Australia, Brunei Darussalam, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, and Vietnam) may also have an impact on international trade.
- Environmental legislation will be another factor that will impact poultry meat production. It will have an effect on the costs of compliance, additional requirements for animal housing as well as the treatment of waste. For the outlook period the rate of growth for all meat sectors is significant. The growing number of animals will lead to more environmental pressure on the land and will generate externalities.
- The situation in China and especially its capacity to increase imports of meat products could have a dramatic impact on the increase in meat prices. China can increase its domestic meat production either by increasing its domestic production while importing or growing more feed or by importing directly the meat from third countries. Both scenarios will have an impact on the global market of the concerned products, knowing that the earlier predictions have largely underestimated the imports of meat products into China. If these predictions s underestimated the Chinese situation it may have a substantial impact on the global production of meat and grain markets. To a lesser extend the situation in India may have an impact as well.

IMPORTS of poultry meat into EU (Tonnes cwe)



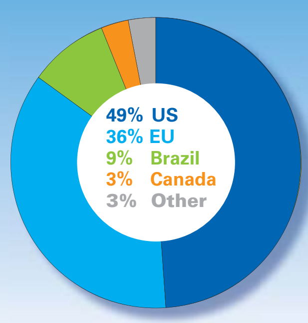
Source: DG AGRI, ManCom July 2014

Trends for global turkey production and consumption

After a drop of more than 70 000 tonnes in global production between 2012 and 2013, production is expected to recover with an increase of 90 000 tonnes in 2014. The US will consolidate its uncontested leadership almost half of the global production. The EU will see a slight decrease in its production of 10 000 tonnes to 37 % of the global production while Brazil's production will reach almost 10 % of the global production with an increase of 15 000 tonnes. No significant changes on the production side are expected in other main producing countries.

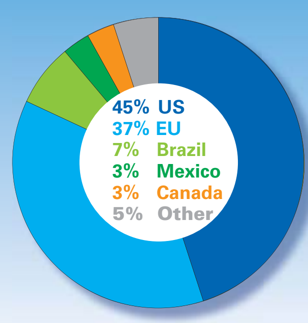
After a drop last year, consumption will continue to grow with more than 100 000 additional tonnes between 2013 and 2014. The US will continue to be the biggest consuming country with 45 % of the global consumption while the EU will remain stable with 37 % of the total consumption. China and South Africa will experience the biggest increase in consumption with 12 000 tonnes and 10 000 tonnes respectively of additional turkey meat consumed. The situation will remain more or less the same as for 2013 in the other consuming countries.

WORLD TURKEY MEAT PRODUCTION 2014*



Share (forecast) in %

WORLD TURKEY MEAT CONSUMPTION 2014*



Share (forecast) in %

* 2013 November estimates

Turkey meat trade (expressed in tons 'ready to cook')

The forecast for trade predicts an increase of both global imports and exports to reach 403 000 tonnes (+24 000 tonnes compared to 2013) and 691 000 tonnes (+11 000 tonnes compared to 2013) respectively. The US will reaffirm its position as a leading exporter with more than 51 % of the total exports, followed by Brazil with 26 % and the EU with 19 % showing a decrease for the third consecutive year. Regarding imports, the volume imported will remain stable, with Mexico leading the imports with 40 % of the imports followed by the EU with 22 %. Only China and South Africa will increase their imports compared to 2013, with around 10 000 tonnes each.

WORLD TURKEY MEAT TRADE 2014*
(1000 tonnes - ready to cook equivalent)

	Imports	Exports
Mexico	162	1
EU	90	130
Brazil	0	180
South Africa	55	0
China	65	0
Russia	14	0
Canada	8	26
US	9	354
TOTAL	**403**	**691**

* 2013 November estimates

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EU: Balance sheet for poultry meat ('000 tons slaughter weight)

	2008	2009	2010	2011	2012	2013
Gross indigenous production	11.722	11.926	12.245	12.430	12.403	12.492
Export meat	905	928	1.149	1.288	1.324	1.307
Import of meat	864	848	782	819	818	806
Consumption	11.681	11.845	11.878	11.960	11.897	11.990
Consumption per capita, kg	23,6	23,8	23,8	23,9	23,7	23,8
Self-sufficiency %	100,4	100,8	103,2	104,0	104,3	104,3

Notes: Partial provisional or estimated.

Source: EU-Commission, so the gross indigenous production is different to table p. 30.

PRODUCTION UPDATED 2014

Gross domestic production of poultry meat in the EU ('000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
Austria (16)*	120	121	125	128	125	125
Belgium / Luxembourg (11)	257	259	250	239	250	250
Bulgaria (18)	106	117	115	110	105	97
Croatia (23)	40	39	30	36	36	36
Cyprus (24)	29	29	29	29	29	29
Czech Republic (13)	212	212	212	212	172	171
Denmark (14)	180	180	180	180	180	168
Estonia (25)	12	14	14	15	14	14
Finland (17)	101	95	96	101	107	111
France (1)	1.762	1.719	1.749	1.864	1.850	1.872
Germany (3)	1.391	1.460	1.623	1.681	1.695	1.709
Greece (12)	191	186	186	187	180	180
Hungary (8)	442	445	430	466	488	515
Ireland (15)	117	114	123	118	124	129
Italy (6)	1.174	1.197	1.221	1.232	1.261	1.258
Latvia (24)	23	21	22	23	25	25
Lithuania (20)	71	70	76	75	80	80
Malta (26)	5	5	4	4	4	4
Netherlands (7)	698	726	739	806	836	852
Poland (2)	1.165	1.247	1.374	1.426	1.582	1.710
Portugal (10)	321	330	337	331	324	324
Romania (9)	357	389	372	365	335	360
Slovakia (21)	106	97	90	74	76	76
Slovenia (22)	52	57	56	58	58	58
Spain (5)	1.178	1.280	1.281	1.278	1.251	1.299
Sweden (19)	86	86	86	86	86	86
United Kingdom (4)	1.462	1.457	1.568	1.558	1.607	1.662
EU-27	**11.659**	**11.952**	**12.387**	**12.683**	**12.880**	**13.200**

*ranking of the country for the variable considered for the year 2013

Note: Partial provisional or estimated. For EU countries some significant differences between national and EUROSTAT data. Rows partly revised, as Eurostat does not continue supply balances. Now, the data are based more on other sources and own calculations.
Sources: MEG according to EU Commission, national data, FAO and EUROSTAT.

Poultry meat production in third countries ('000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
USA *)	19.881	18.953	19.583	19.792	19.796	20.100
China	15.336	15.949	16.645	16.720	18.230	18.000
Brazil *)	11.498	11.489	12.797	13.352	13.260	13.400
Russia	2.044	2.360	2.610	2.942	3.346	.
Mexico	2.625	2.678	2.723	2.807	2.833	.
India	1.920	2.125	2.231	2.245	2.258	.
Turkey	1.101	1.309	1.457	1.627	1.737	.
Argentina	1.445	1.546	1.643	1.695	1.711	.
Japan	1.369	1.414	1.417	1.378	1.445	.
Ukraine	794	894	953	995	1.075	.
Chile	611	604	594	657	667	.
Saudi-Arabia	565	571	576	572	568	.
Switzerland	64	65	69	73	76	80
World production	**92.800**	**85.150**	**99.400**	**102.550**	**105.750**	**107.500**

Note: Partial provisional or estimated. Mostly gross domestic production.
*) Only Chicken and Turkey meat.
Sources: MEG to USDA, FAO and national data.

TRADE

Import of EU-countries poultry meat ('000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
Poultry meat 1)						
Austria (7)*	66	85	98	92	104	99
Belgium / Luxembourg (5)	155	157	162	189	222	228
Bulgaria (11)	58	68	81	102	109	88
Cyprus (24)	5	6	7	7	8	10
Czech Republic (9)	64	77	79	92	101	92
Denmark (10)	47	48	58	67	76	91
Estonia (22)	17	18	21	20	18	19
Finland (25)	5	5	5	5	5	5
France (4)	279	310	356	372	383	376
Germany (1)	434	460	491	500	514	531
Greece (12)	57	66	54	61	74	76
Hungary (17)	47	45	38	47	45	50
Ireland (13)	56	53	55	60	65	69
Italy (14)	32	37	46	54	60	63
Latvia (21)	27	26	28	28	29	28
Lithuania (20)	31	25	20	24	31	32
Malta (26)	4	5	5	5	4	5
Netherlands (2)	419	396	437	470	450	422
Poland (19)	35	39	33	33	44	40
Portugal (16)	33	39	45	48	46	54
Romania (8)	118	131	94	91	111	96
Slovakia (15)	38	38	47	46	32	55
Slovenia (23)	11	11	12	13	14	15
Spain (6)	118	119	126	124	122	126
Sweden (18)	38	38	40	38	43	45
United Kingdom (3)	335	339	380	411	393	394
EU-27	**213**	**199**	**167**	**184**	**184**	**149**
Salted meat 2)						
Germany	61	52	36	38	37	38
Netherlands	114	137	132	140	154	160
United Kingdom	24	33	36	47	44	50
EU from third countries	**204**	**213**	**196**	**207**	**212**	**227**
Preparations of poultry 3)						
EU from third countries	**430**	**433**	**432**	**499**	**497**	**448**

* ranking of the country for the variable considered for the year 2013

Note: 1) Without preparations, livers, salted meat and live poultry. (only tariff heading 0207) - 2012 partly preliminary. - Data in the EUROSTAT trade statistics and trade balance are partial different.
2) Tariff 0210 99 39, almost exclusively poultry.
3) Tariff items 1602 31 .. 1602 32 .. and 1602 39 …
Source: MEG to Eurostat and national statistics.

Export of EU countries of poultry meat ('000 tons)

	2008	2009	2010	2011	2012	2013
Austria (11)*	43	49	51	52	58	56
Belgium / Luxembourg (5)	340	377	410	436	488	468
Bulgaria (15)	12	29	46	47	47	36
Cyprus (24)	1	2	2	2	2	1
Czech Republic (17)	23	23	26	25	31	29
Denmark (9)	105	92	106	87	82	79
Estonia (23)	4	4	6	9	6	7
Finland (21)	14	13	13	15	17	18
France (3)	483	479	505	548	526	519
Germany (4)	416	402	446	467	501	497
Greece (18)	16	13	15	22	23	22
Hungary (6)	124	130	150	172	189	194
Ireland (13)	37	39	62	78	63	48
Italy (7)	122	116	150	151	149	147
Latvia (22)	3	4	7	8	9	13
Lithuania (14)	15	18	24	31	39	43
Malta (25)	0	0	0	0	0	0
Netherlands (1)	886	875	1.076	1.217	1.061	1.052
Poland (2)	280	316	412	442	528	571
Portugal (19)	9	9	10	17	18	19
Romania (10)	12	33	59	75	79	70
Slovakia (16)	15	14	30	28	34	35
Slovenia (20)	15	14	17	18	18	19
Spain (8)	97	90	128	147	129	136
Sweden (12)	29	30	44	44	51	52
United Kingdom (6)	278	258	270	195	296	350
EU-27 2)	**857**	**886**	**1.125**	**1.266**	**1.275**	**1.269**
specified by species						
Chicken	711	752	960	1.084	1.091	1.096
Turkey	117	103	130	143	146	136
Ducks, geese, guinea fowls	29	31	35	40	37	37
Preparations of poultry 3)						
EU to third countries	44	45	45	49	50	42

* ranking of the country for the variable considered for the year 2013

Note: 1) Without preparations, livers, salted meat and live poultry.
2) 2012 partly preliminary. - Data in the EUROSTAT trade statistics and trade balance are partial different.
3) tariff items 1602 31.. 1602 32.. and 1602 39..
Source: MEG to Eurostat and national statistics.

Foreign trade with third countries of poultry and chicken meat ('000 tons)

	2008	2009	2010	2011	2012	2013
Total imports of poultrymeat						
Switzerland	45	44	44	46	46	45
Imports of chicken meat						
Angola	.	161	239	287	301	340
China	399	401	286	238	254	260
Hong Kong 1)	236	253	295	410	370	.
Irak	.	397	522	598	612	655
Japan	737	645	789	895	877	860
Russia	1.166	929	656	463	560	540
Saudi Arabia	510	605	681	788	799	810
United Arab. Emirates	289	297	289	314	.	.
Exports of chicken meat						
Argentina	164	178	214	224	291	323
Brazil	3.242	3.222	3.272	3.443	3.508	3.580
Chile	63	87	79	90	93	91
China	285	291	379	423	411	415
Thailand	383	379	432	467	538	540
USA	3.157	3.093	3.067	3.161	3.300	3.354

Note: Partial provisional or estimated.
1) Without transit goods.
Sources: MEG to USDA and national data.

Per capita consumption of poultry meat in the EU and third countries (kg)

	2008	2009	2010	2011	2012
Austria (10)*	19,3	20,1	20,5	20,8	21,2
Belgium / Luxembourg	18,7	18,0	17,0	16,8	.
Bulgaria	.	22,0	.	.	.
Cyprus	.	.	.	.	.
Czech Republic (7)	23,8	23,9	23,5	24,0	23,0
Denmark	24,0	24,4	23,8	24,1	.
Estonia	19,0	21,0	.	.	.
Finland (15)	17,0	16,6	16,7	16,9	17,4
France (6)	24,5	24,4	24,7	25,2	25,7
Germany (14)	18,6	19,2	19,1	19,4	19,0
Greece (11)	20,5	21,0	20,7	20,5	20,7
Hungary (3)	30,0	29,0	28,8	29,0	29,5
Ireland (2)	32,2	31,0	30,5	29,5	30,0
Italy (14)	17,5	18,2	18,5	18,7	19,0
Latvia (12)	20,2	20,0	19,5	19,7	20,0
Lithuania (8)	23,3	23,0	22,2	22,5	22,7
Malta	.	.	.	.	.
Netherlands (9)	22,6	23,1	22,8	22,3	22,3
Poland (5)	24,6	25,6	26,3	27,4	27,6
Portugal (1)	32,5	34,0	34,1	39,8	39,7
Romania	18,0	19,0	.	.	.
Slovakia (13)	19,0	20,0	20,1	20,0	19,8
Slovenia	27,0	.	.	.	.
Spain (2)	30,5	30,5	30,2	30,5	30,0
Sweden (16)	13,0	12,8	12,0	11,8	11,6
United Kingdom (4)	26,0	26,4	28,6	28,5	28,7
EU	**23,6**	**23,8**	**23,8**	**23,9**	**23,7**
Switzerland	17,0	16,8	17,2	17,8	17,7

* ranking of the country for the variable considered for the year 2012

Note: Partial provisional or estimated. For EU countries.
Rows partly revised, as Eurostat does not continue supply balances.
The data are based more on other sources and own calculations.

Self-sufficiency in poultry meat (%)

	2008	2009	2010	2011	2012	2013
Austria (14)*	75	72	73	73	70	70
Belgium / Luxembourg	165	180	185	190	.	.
Bulgaria	.	78	.	.	.	.
Czech Republic (12)	84	80	80	78	74	76
Denmark	145	141	146	135	.	.
Estonia	51	52	.	.	.	.
Finland (5)	105	104	104	105	107	107
France (5)	119	115	114	114	110	107
Germany (4)	93	95	106	108	111	109
Greece (11)	79	74	80	80	79	78
Hungary (3)	128	134	135	136	138	137
Ireland (6)	94	100	102	104	100	100
Italy (5)	108	108	110	110	108	107
Latvia (15)	49	52	52	52	53	55
Lithuania (7)	80	85	90	93	95	98
Netherlands (1)	188	190	196	217	224	226
Poland (2)	124	128	136	139	139	140
Portugal (10)	93	92	92	93	93	91
Romania	77	79	.	.	.	.
Slovakia (13)	74	69	71	70	78	72
Spain (6)	97	97	99	101	100	100
Sweden (8)	85	86	92	95	97	96
United Kingdom (9)	92	90	88	87	89	92
EU 27	**100**	**101**	**103**	**104**	**104**	**104**

* ranking of the country for the variable considered for the year 2013

Note: Partial provisional or estimated.
Rows partly revised, as Eurostat does not continue supply balances. Now, the data are based more on other sources and own calculations.
Sources: MEG according to EU Commission, national data, FAO and EUROSTAT.

BROILER

Broiler production in the EU and third countries (Gross Domestic production - '000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
Austria (17)*	85	90	90	91	89	89
Belgium / Luxembourg (11)	250	250	249	235	246	246
Bulgaria (20)	74	79	77	81	78	72
Cyprus (23)	28	27	28	27	25	25
Czech Republic (13)	191	181	181	181	158	161
Denmark (12)	175	175	175	175	175	168
Estonia (24)	14	14	14	14	14	14
Finland (16)	91	86	88	93	99	104
France (4)	1.009	1.008	1.041	1.096	1.091	1.146
Germany (3)	868	911	1.073	1.150	1.160	1.190
Greece (14)	160	160	160	160	160	160
Hungary (9)	230	145	240	254	280	305
Ireland (15)	91	98	109	110	116	117
Italy (6)	713	742	780	796	816	820
Latvia (23)	23	23	23	23	25	25
Lithuania (19)	70	69	76	75	79	79
Malta (25)	5	5	4	4	4	5
Netherlands (7)	626	655	664	710	738	750
Poland (1)	730	1.060	1.123	1.150	1.325	1.450
Portugal (10)	251	263	269	265	258	259
Romania (8)	357	389	370	359	325	350
Slovenia (22)	46	47	46	47	49	50
Slovakia (21)	93	84	79	66	68	70
Spain (5)	1.059	1.063	1.085	1.073	1.063	1.041
Sweden (18)	78	79	79	80	80	80
United Kingdom (2)	1.214	1.220	1.323	1.297	1.322	1.391
EU 27	**8.531**	**8.923**	**9.445**	**9.612**	**9.843**	**10.166**
Argentina	1.435	1.500	1.680	1.770	2.014	2.022
Brazil	11.033	11.021	12.312	12.863	12.645	12.308
China	11.840	12.100	12.550	13.200	13.700	13.500
India	2.490	2.550	2.650	2.900	3.160	3.420
Indonesia	1.350	1.409	1.465	1.515	1.540	1.550
Iran	1.450	1.525	1.600	1.660	.	.
Mexico	2.853	2.781	2.822	2.906	2.958	3.002
Russia	1.680	2.060	2.310	2.575	2.830	3.050
South-Africa	1.240	1.250	1.290	1.300	.	.
Thailand	1.170	1.200	1.280	1.350	1.550	1.500
USA	16.561	15.935	16.563	16.694	16.621	16.958
World	**80.744**	**83.366**	**87.286**	**90.100**	**92.730**	**94.000**

* ranking of the country for the variable considered for the year 2013

Notes: Mainly provisional or estimated, official data on broiler production and consumption of only a few countries. - EU data based on gross domestic production. Partly contradictory towards official information on poultry meat production.
Source: MEG to USDA, FAO and national figures.

Per capita consumption of broiler in selected EU and third countries (kg)

	2008	2009	2010	2011	2012	2013
Austria	11,8	12,3	12,6	13,1	13,3	13,4
France	14,2	14,6	14,8	15,2	15,8	16,2
Germany	10,3	10,9	10,9	11,4	11,1	11,7
Italy	11,0	11,4	11,5	11,6	11,7	11,7
Netherlands	18,4	19,0	18,8	18,4	18,4	18,5
United Kingdom	20,7	20,6	22,2	21,7	22,0	22,5
EU-27	**16,9**	**17,1**	**17,4**	**17,6**	**17,6**	**17,8**
Third Countries						
Argentina	32,1	33,2	36,5	38,2	42,0	41,0
Brazil	40,6	40,3	46,3	47,8	46,0	45,9
China	8,7	8,8	9,0	9,3	9,5	9,6
India	2,1	2,1	2,2	2,4	2,6	2,7
Iran	20,1	21,0	22,3	23,3	.	.
Japan	15,1	15,5	16,3	16,5	17,4	17,0
Mexico	28,5	28,0	28,5	29,1	29,5	30,0
Russia	19,8	20,8	20,6	21,0	23,2	24,7
South Africa	28,4	28,4	29,6	32,5	33,5	33,3
United Arab Emirates	63,8	63,1	59,1	.	.	.
USA	43,8	41,8	43,1	43,4	42,0	42,7

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

TURKEY

Turkey production in the EU and third countries ('000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
Austria (10)*	24	25	24	25	26	27
Belgium / Luxembourg (17)	4	4	4	3	3	3
Bulgaria	1	0	0	0	0	0
Croatia (15)	9	7	6	5	6	6
Cyprus (18)	1	1	1	1	1	1
Czech Republic (18)	4	4	4	4	8	1
Denmark	1	0	0	0	0	0
Finland (14)	10	9	9	8	8	7
France (1)	456	421	409	406	415	386
Germany (2)	386	383	434	398	392	385
Greece (17)	3	3	3	3	3	3
Hungary (7)	120	110	100	101	95	89
Ireland (13)	16	8	8	10	9	8
Italy (3)	300	293	279	276	315	314
Malta	0	0	0	0	0	0
Netherlands (9)	29	27	28	28	28	28
Poland (4)	285	280	280	280	290	285
Portugal (8)	40	38	39	38	39	39
Romania (12)		.	2	5	10	10
Slovakia (11)	14	14	14	14	14	14
Slovenia (14)	6	6	6	7	7	7
Spain (6)	25	28	111	104	111	179
Sweden (16)	3	4	4	4	4	4
United Kingdom (5)	160	157	162	171	196	187
EU-28	**1.902**	**1.827**	**1.931**	**1.896**	**1.984**	**1.987**
Brazil	465	466	485	489	510	520
Canada	180	167	159	160	161	165
Mexico	15	11	11	13	14	10
Russia	.	31	70	90	100	100
South Africa	28	26	26	24	33	45
USA	2.796	2.535	2.527	2.592	2.671	2.623
World	**5.656**	**5.424**	**5.493**	**5.511**	**5.664**	**.**

* ranking of the country for the variable considered for the year 2013

Notes: Partial provisional or estimated, official data on turkey production only a few countries. - EU data based on gross domestic production. Partly contradictory towards official information on poultry meat production.
Source: MEG to FAO, USDA and national data.

Per capita consumption of turkey in selected EU and third countries (kg)

	2008	2009	2010	2011	2012	2013
Austria (1)*	6,2	6,4	6,3	6,1	6,2	6,3
France (3)	5,1	5,0	5,1	5,1	5,3	5,2
Germany (2)	6,3	6,3	6,2	6,1	6,1	5,7
Italy (5)	5,0	4,9	4,8	4,7	4,8	4,8
Netherlands (7)	1,2	1,1	1,0	1,0	1,0	1,1
Portugal (4)	.	.	.	.	.	5,0
United Kingdom (6)	3,9	4,0	4,0	4,1	4,2	4,2
EU-27	**3,5**	**3,4**	**3,5**	**3,5**	**3,9**	**3,8**
Third Countries						
Brazil	1,4	1,6	1,7	1,8	1,7	1,7
Canada	4,9	4,5	4,2	4,3	4,1	4,1
Mexico	1,8	1,3	1,4	1,4	1,4	1,4
Russia	0,7	0,5	0,7	0,8	0,8	0,8
USA	7,9	7,7	7,4	7,3	7,3	7,3

* ranking of the country for the variable considered for the year 2013

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

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DUCK

Duck production in EU countries ('000 tons carcass weight)

	2008	2009	2010	2011	2012	2013
Austria (16)*	0,1	0,1	0,1	0,2	0,1	0,1
Belgium / Luxembourg	0,0	0,1	0,1	0,0	0,0	0,0
Bulgaria (5)	13,0	17,5	18,0	21,0	21,7	21,0
Cyprus	0,2	0,2	0,2	0,2	0,0	0,0
Czech Republic (11)	8,8	8,8	8,8	8,8	4,8	3,8
Denmark (16)	0,0	0,0	0,0	0,0	0,0	0,1
Estonia	.	.	.	.	.	.
Finland	0,1	0,0	0,0	0,0	0,0	0,0
France (1)	270,0	240,7	238,0	242,6	240,4	233,3
Germany (3)	67,1	67,8	67,3	62,4	63,6	50,8
Greece (15)	0,2	0,2	0,2	0,2	0,2	0,2
Hungary (2)	49,0	55,0	61,0	71,0	69,6	76,5
Ireland (10)	5,8	3,9	4,2	4,0	4,2	4,0
Italy (8)	15,0	15,0	14,0	14,0	14,0	13,0
Latvia	.	.	.	.	.	.
Lithuania (14)	0,3	0,2	0,1	0,3	0,3	0,3
Malta	.	.	.	.	.	.
Netherlands (6)	17,0	17,0	18,0	17,0	17,0	17,0
Poland (6)	17,2	17,0	17,2	16,8	16,8	17,0
Portugal (9)	10,0	10,0	10,0	9,0	8,5	8,0
Romania	.	.	.	.	.	.
Slovakia (13)	0,4	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
Spain (12)	0,0	0,0	4,8	4,3	6,0	1,0
Sweden	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom (4)	35,0	32,0	31,0	33,0	32,1	30,0
EU	**512**	**488**	**496**	**508**	**503**	**480**
World	**3.798**	**3.872**	**4.073**	**4.214**	**4.378**	**.**

* ranking of the country for the variable considered for the year 2013

Notes: Partial provisional or estimated (base = gross domestic production), official data on Duck production of only a few countries. Partly contradictory towards official information on poultry meat production.

Source: MEG to FAO, USDA and national data.

PROJECTIONS

POULTRY MEAT MARKET PROJECTIONS FOR THE EU-27, 2014-2023 ('000 t carcass weight equivalent)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Gross indigenous Production	12.854	12.899	13.001	13.087	13.200	13.285	13.353	13.428	13.519	13.602
of which EU-15	9.863	9.869	9.921	9.961	10.027	10.067	10.092	10.122	10.167	10.206
of which EU-N13	2.991	3.029	3.081	3.126	3.172	3.218	3.261	3.306	3.353	3.397
Imports	841	842	844	844	847	849	850	852	854	855
Exports	1.322	1.335	1.338	1.339	1.347	1.356	1.368	1.385	1.403	1445
Net Trade	481	493	494	495	500	507	518	533	549	590
Consumption*	12.373	12.406	12.507	12.592	12.700	12.778	12.835	12.895	12.970	13.013
of which EU-15	9.842	9.870	9.967	10.048	10.146	10.218	10.271	10.325	10.393	10.433
of which EU-N13	2.531	2.535	2.540	2.544	2.554	2.560	2.564	2.570	2.577	2.580
Population (in million)	509,9	511,1	512,3	513,5	514,6	515,6	516,5	517,3	518,0	518,6
of which EU-15	403,1	404,4	405,8	407,1	408,3	409,5	410,6	411,5	412,4	413,2
of which EU-N13	106,8	106,6	106,5	106,4	106,3	106,1	106,0	105,8	105,6	105,4
Per Capita Consumption*	21.35	21.36	21.48	21.58	21.72	21.81	21.87	21.94	22.03	22.08
of which EU-15	21.48	21.48	21.62	21.72	21.87	21.96	22.02	22.08	22.18	22.22
of which EU-N13	20.87	20.93	20.99	21.04	21.15	21.23	21.29	21.38	21.47	21.54

*retail weight equivalent; coefficient to transform carcass weight into retail weight is 0.88 for poultry meat
Source: Prospects for Agricultural Markets and Income in the EU 2013-2023, The European Commission, DG AGRI, December 2013 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2013/fullrep_en.pdf

AGGREGATE MEAT MARKET PROJECTIONS FOR THE EU 2014-2023 ('000 t carcass weight equivalent)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Gross Indigenous Production	**43.959**	**44.304**	**44.459**	**44.707**	**44.877**	**45.030**	**45.168**	**45.260**	**45.383**	**45.546**
of which EU-15	36.672	36.970	37.071	37.256	37.369	37.458	37.539	37.575	37.642	37.744
of which EU-N12	7.287	7.334	7.388	7.451	7.509	7.572	7.630	7.685	7.742	7.802
Imports of live animals	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Exports of live animals	**174**	**195**	**195**	**195**	**195**	**195**	**195**	**195**	**195**	**195**
Net production	**43.786**	**44.110**	**44.264**	**44.512**	**44.683**	**44.835**	**44.974**	**45.066**	**45.189**	**45.352**
Imports (meat)	**1.409**	**1.403**	**1.419**	**1.419**	**1.431**	**1.462**	**1.469**	**1.480**	**1.490**	**1.489**
Exports (meat)	**3.585**	**3.586**	**3.621**	**3.662**	**3.702**	**3.732**	**3.755**	**3.789**	**3.816**	**3.874**
Net trade	2.175	2.184	2.203	2.242	2.271	2.270	2.286	2.309	2.325	2.385
Consumption*	**41.607**	**41.925**	**42.066**	**42.271**	**42.414**	**42.565**	**42.687**	**42.756**	**42.863**	**42.966**
of which EU-15	34.027	34.315	34.470	34.651	34.805	34.941	35.058	35.131	35.234	35.321
of which EU-N13	7.580	7.609	7.597	7.620	7.609	7.624	7.629	7.626	7.629	7.645
Population (in million)	509,9	511,1	512,3	513,5	514,6	515,6	516,5	517,3	518,0	518,6
of which EU-15	403,1	404,4	405,8	407,1	408,3	409,5	410,6	411,5	412,4	413,2
of which EU-N13	106,8	106,6	106,5	106,4	106,3	106,1	106,0	105,8	105,6	105,4
Per capita consumption*	**65,06**	**65,38**	**65,45**	**65,63**	**65,72**	**65,84**	**65,93**	**65,95**	**66,04**	**66,13**
of which EU-15	67,08	67,39	67,49	67,64	67,75	67,84	67,91	67,90	67,98	68,02
of which EU-N13	57,43	57,73	57,70	57,94	57,93	58,12	58,25	58,33	58,47	58,71
of which Beef/Veal	10,76	10,93	10,93	10,89	10,86	10,79	10,72	10,65	10,58	10,50
of which Sheep/goat	1,91	1,87	1,86	1,84	1,83	1,81	1,80	1,79	1,78	1,76
of which Pig meat	31,03	31,22	31,18	31,32	31,31	31,42	31,53	31,57	31,64	31,79
of which Poultry meat	21,35	21,36	21,48	21,58	21,72	21,81	21,87	21,94	22,03	22,08

*retail weight equivalent; coefficient to transform carcass weight into retail weight is 0.88 for poultry meat

Source: Prospects for Agricultural Markets and Income in the EU 2013-2023, The European Commission, DG AGRI, December 2013 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2013/fullrep_en.pdf)

TABLE EU 27 POULTRYMEAT IMPORT – EXPORT TRADE MAIN TARIFF LINES, 2005 – 2010 – 2012 – 2013

IMPORTS

Source: Extraction EUROSTAT, May 2014

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2005	2010	2012	2013	2012	2013
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	4.349.324	1.774.504	1.841.094	1.490.384	203,10	208,47
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65 % chickens'	110.980	114.059	90.106	88.548	136,84	157,72
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.419.962	1.018.232	1.122.221	879.554	239,84	246,09
02071460	Frozen legs and cuts thereof of fowls of the species gallus domesticus, with bone in	408.140	120.717	77.567	88.788	136,73	149,15
02071470	Frozen cuts of fowls of the species Gallus domesticus, with bone is (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)	43.130	30.488	25.117	25.931	189,66	195,42
02072710	Frozen boneless cuts of turkeys of the species domesticus	173.417	144.333	146.627	144.972	296,88	276,30
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	32.804	1.956.437	2.122.726	2.272.151	234,25	232,29
1602 (poultry)	**PREPARED/PRESERVED MEAT**	3.067.354	4.287.219	4.424.279	3.968.496	308,63	317,41
160231	**TURKEYS**	944.998	844.275	776.585	686.645	311,00	309,28
16023111	**Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)**	927.902	796.703	760.960	667.861	306,17	303,96
160232	**GALLUS DOMESTICUS**	2.052.387	3.305.460	3.468.074	3.115.058	296,00	307,53
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	382.163	119.053	228.529	111.504	282,04	277,02
16023219	Cooked. prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	1.618.696	2.329.177	2.365.941	2.321.501	327,63	341,47
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.)	44.799	804.549	842.920	663.356	209,45	193,10
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.)	6.729	52.694	30.693	18.696	338,09	335,93
160239	**OTHER**	69.969	137.471	179.607	166.791	542,48	535,49
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	56.094	132.063	172.412	155.976	545,85	541,26

EXPORTS

Source: Extraction EUROSTAT, May 2014

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2005	2010	2012	2013	2012	2013
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	8.558.987	11.244.117	12.749.536	12.692.825	124,24	125,98
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	238.238	236.448	172.859	180.031	123,69	129,17
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens',	2.226.291	2.787.195	2.976.140	2.926.716	138,28	143,79
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.070.511	1.872.414	2.150.354	2.065.999	72,78	71,61
02071420	Frozen halves or quarters of fowls of the species gallus domesticus	386.980	1.077.792	1.093.184	1.145.732	126,30	121,18
02071430	Frozen whole wings, with or without tips of Gallus domesticus	646.017	946.854	1.341.209	1.271.223	132,21	133,61
02071460	Frozen legs and cuts thereof of fowls of the species gallus	280.842	490.015	538.853	725.333	109,35	103,00
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	853.031	607.182	647.077	863.600	86,69	88,37
02072710	Frozen boneless cuts of turkeys of the species domesticus	577.512	306.916	266.960	232.729	105,28	95,25
02072730	Frozen whole wings, with or without tips, of turkeys	178.987	217.395	316.707	318.617	156,99	158,65
0207 other		2.100.578	2.701.906	3.246.193	2.962.845	149,82	160,18
1602 (poultry)	**PREPARED/PRESERVED MEAT**	290.379	451.693	503.997	423.683	322,57	334,30
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	137.129	179.993	231.447	208.831	307,08	307,82
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.)	55.027	103.424	148.524	80.426	323,16	364,95
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.)	16.772	67.120				
1602 other		81.451	101.156	124.026	134.426	350,77	357,10

ADOPTED, UPCOMING AND PENDING EU LEGISLATIVE PROPOSALS

ANIMAL WELFARE
Regulation 2009/1099/EC. Welfare of animals at the time of killing.
End 2013/beginning 2014 EFSA published a number of scientific opinions related to slaughter for poultry:
Scientific Opinion on monitoring procedures at slaughterhouses for poultry - December 2013-
http://www.efsa.europa.eu/en/efsajournal/doc/3521.pdf
Low atmosphere pressure system for stunning Poultry- January 2014-
http://www.efsa.europa.eu/en/efsajournal/doc/3488.pdf
Scientific Opinion on electrical requirements for poultry water bath stunning equipment.
http://www.efsa.europa.eu/en/efsajournal/pub/3745.htm

ANIMAL HEALTH
"Smarter rules for safer food": new proposal on EU Animal Health Law and Official controls
The European Parliament adopted a resolution on its first reading position on 15 April 2014.
Further details are foreseen in subsequent delegated and implementing acts as appropriate.
The "Smarter rules for safer food" proposal is estimated to enter into force in 2016
Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on Animal Health
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202630#1215207
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0136%28COD%29
Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on official controls and other official activities performed to ensure the application of food and feed law, rules on animal health and welfare, plant health, plant reproductive material, plant protection products
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=202628
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2013/0140(COD)

SANCO/6876/2009- AMR (antimicrobial resistance)
The Commission Action Plan to combat the rising threat from Antimicrobial Resistance aims to reduce the overall use of antimicrobials in veterinary medicine (better targeted treatments, use according to best practices, etc.). The Commission is working on an official guidance document on prudent use; audits will address the prudent use issue after publication of the guidance document. (Foreseen for end 2014)
Updated (June 2014) AMR roadmap available:
http://ec.europa.eu/dgs/health_consumer/docs/road-map-amr_en.pdf

FOOD AND FEED SAFETY
SANCO/10803/2011. Revision of the hygiene package: Reg. 852/2004 – 853/2004 – 854/2004 (on-going) - Hygiene Package, composite products and meat inspection
The revision of food hygiene law is likely to be adopted by 2014. The priorities are to improve food hygiene and therefore increase food safety by introducing simpler and harmonised procedures for meat inspection looking at the actual risks based on trends in humans and animals discovered by improving tools such as food chain information. The focus is on specific threats such as Campylobacter, developing new prevention methods and harmonising the hygiene indicators among MSs.

The European Union Summary Report on Trends and Sources of Zoonoses, Zoonotic Agents and Food-borne Outbreaks in 2012- http://www.efsa.europa.eu/en/efsajournal/doc/3547.pdf

Proposal for revision of the medicated feed legislation (Directive 90/167/EEC)
Simplification Rolling Programme- The initiative aims to clarify the scope of medicated feed legislation with respect to other parts of the feed law and with the legislation on veterinary medicines. Among other objectives the revision is aiming to set a tolerance level for carry-over of veterinary medicines, based on a safety assessment, to overcome the impractical zero tolerance.
Commission roadmap: http://ec.europa.eu/smart-regulation/impact/planned_ia/docs/2010_sanco_055_medicated_feed_en.pdf

Legal proposal for review of veterinary medicines 2014
The objective of the review is to increase the availability of medicines on the market; to decrease administrative burden on enterprises by streamlining the authorisation processes while respecting public health, animal health as well as the environment; priority will be to reinforce legal base for collection of antimicrobials in regulatory framework for veterinary medicines.
Commission roadmap: http://ec.europa.eu/smart-regulation/impact/planned_ia/docs/2012_sanco_002_veterinary_pharmaceutical_legislation_en.pdf

EFSA Scientific Opinion on Peroxyacetic Acid
On the 26th of March 2014 EFSA published its scientific opinion on the evaluation of the safety and efficacy of peroxyacetic acid solution for reduction of pathogens on poultry carcasses and meat:
http://www.efsa.europa.eu/en/efsajournal/pub/3599.htm

MARKETING STANDARDS - LABELLING - PRODUCT QUALITY

Regulation 543/2008 implementing Reg. 1234/2007 - marketing standards for poultry meat (pending)
See page 19 of the Annual Report.

Provision of food information to consumers:
Regulation 1169/2011 published on 22 Nov 2011 and entered into force on 13 December 2011, although the majority of provisions will apply by December 2014.
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF

Legislative proposals for a better targeted information and promotion policy for agricultural products:
On the 1st of April 2014 a political agreement on the new promotion policy between the European Parliament, Council and Commission has been reached. In 2015 the Commission will finalize the implementing and delegated acts, the legal and linguistic text. The new promotion policy will fully enter into force on 1st December 2015.
http://ec.europa.eu/agriculture/promotion/policy/legislative-proposal/index_en.htm
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2011/0290(COD)

Legislative proposal for a reviewed legislation on organic farming:
On 24 March 2014 the European Commission adopted the legislative proposals for a new Regulation on organic production and labelling of organic products that seeks to update the current legal framework (Reg. 834/2007).
The legislative proposals are accompanied by an impact assessment that evaluates alternative scenarios for the evolution of the policy and by an action plan on the future of Organic Production in Europe to help organic farmers, producers and retailers adjust to the new policy and meet future challenges. This proposal will now have to pass the Council and the Parliament.
http://ec.europa.eu/agriculture/organic/eu-policy/policy-development/index_en.htm
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=1041840
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2014/0100(COD)

ENVIRONMENT
Communication "Towards a circular economy: a zero waste programme for Europe"
On the 2nd of July 2014, the European Commission adopted the Communication "Towards a circular economy: a zero waste programme for Europe" and annex to establish a common and coherent EU framework to promote the circular economy. As part of the circular economy package, the Commission also adopted a legislative proposal to review recycling and other waste-related targets in the EU and annex.
http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0398&from=EN
http://ec.europa.eu/environment/circular-economy/

Interview of RICARDO SANTIN, Vice-President – Poultry Division – Brazilian Association of Animal Protein

Short Biography of Ricardo:

Ricardo Santin is the Vice-President of the Poultry Division at the Brazilian Association of Animal Protein (ABPA). Prior to this position, he was the Executive Director of the Brazilian Poultry Association (UBABEF). He is also the Vice-president of the International Poultry Council, where he represents the Brazilian poultry industry globally. He was an Advisor to the Regional Development Bank (BRDE), to the Auditors Court and the State Parliament. Prior to these advisory positions, he was the Administrative President of the board of CEAGESP (Company General Warehouses of São Paulo). Ricardo holds a BA in Law and a Master degree in Political Science.

The Brazilian poultry industry has tremendously developed in the past decade. What are the main factors that explain that Brazil is today the second producer of poultry meat globally behind the US and the world leading exporter?

The land and grain availability, the climate, the integrated production system, global companies, high investments in technology and a strong commitment to the requirements of international clients are the main factors of success of the Brazilian poultry sector.

UBABEF has made an analysis of the strong and weak points and the opportunities and threats for the Brazilian poultry production and trade. What are the most important findings and how UBABEF is responding to them?

Logistics, labour force and packaging costs, as well as the tax system are on top of the challenging aspects for the Brazilian poultry industry.

In the EU citizens and consumers put great interest on ethical quality aspects as animal welfare and environment. Do you see or expect a similar trend in the society in Brazil? How the Brazilian industry is preparing for this?

Yes. Although it is not as widespread as it is in the EU, animal welfare and environmental concerns are raising in Brazil. Our industry invests in social, environmental and economic sustainable development management as to guarantee the least impact of our activities.

From a Brazilian perspective, what are in your view the strong and weak points of the EU poultry meat sector? Do you believe that the EU poultry meat sector can remain competitive and keep its sector profitable while complying with very constraining EU standards? Or in other words what are the opportunities and threats for the European poultry meat industry?

The EU has a strong domestic market as its main client, just like in Brazil. Production costs, especially due to grain imports, can be a threat to the EU production. As far the EU standards are concerned, as an exporter to the EU, Brazil also needs to comply with the same standards in order to be approved and it increases our production cost. As an organized industry, the EU poultry sector should always demand a science-based approach to the decisions of the Commission that may result in an increase in production costs.

Why the EU is such an attractive market for the Brazilian producers and why markets like the US are less targeted by the Brazilian exporters?

The EU has a well developed market and it sets trends in terms of consumption habits and animal health and welfare regulations. Also, the local prices, thanks to the EU products, are also attractive for Brazilian exporters, most of the time. We can say that exporting to the EU can be a signal of quality of those approved. As for the US, at the moment they are conducting a risk assessment on the Brazilian Poultry industry. It is not that the US is not targeted, it is that there is a great partnership and complementarity with the European Union, developed due to the interest of importers and processors and the needs of the European market. If this same relation is established with the US, exports will happen.

How do you see the TTIP negotiations between the US and EU for the poultry sector? Is it considered as a threat or an incentive in the perspective of the EU-Mercosur negotiations?

It can certainly be an incentive for the EU-Mercosur agreement to advance. For the poultry sector, given the products exported from the US, it is unlikely that the TTIP take out Brazil from the imports of the EU, but, of course, we have to be cautious and invest in the EU-Mercosur agreement.

Do you see the possibility for another emerging country to experience the same growth than the Brazilian sector has undergone and become the "new Brazil" in the poultry meat market earning big market share rapidly (Ukraine, Argentina, Thailand)?

It can happen, although it is not probable. Given the natural resources, grain availability and level of internationalization of the companies, it is very unlikely that we see other countries increase their production at such levels as to surpass our position.

In your opinion what are the main challenges that the Brazilian sector and the sector as a whole will have to face in the 10-20 upcoming years?

Balancing environmental and animal welfare concerns with an increasing demand, always based on science, especially from developing countries, this is going to be the main challenge for all poultry producers.

How do you assess the role and the results achieved in IPC (International Poultry Council) and what should be the main goal of the association in the future?

The results are extremely positive and have already brought huge benefits for the world poultry sector. The interaction with the FAO, OIE, WTO, Codex and other international organizations, has made IPC play an important role in the maintenance of the food security and guaranteeing safe food worldwide. Besides that, the IPC is consolidated as a great world discussion forum for the poultry industry.

BOARD MEMBERS AND DEPUTY BOARD MEMBERS 2014-2015

AUSTRIA	Harald Schliessnig (BM)	Martina Glatzl (DBM)
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CZECH REPUBLIC	František Mates (BM)	Monika Bočková (DBM)
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FINLAND	Marika Säynevirta (BM)	Veli-Matti Jäppilä (DBM)
FRANCE	Paul Lopez (BM & VP)	Gilles le Pottier (DBM)
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HUNGARY	Attila Csorbai (BM)	György Endrödi (DBM)
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NETHERLANDS	Jan Odink (BM)	Peter Vesseur (DBM)
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SPAIN	Javier Rodriguez (BM)	Claudio Arenas (DBM)
SWEDEN	Maria Donis (BM)	Martin Lindström (DBM)
UNITED KINGDOM	Philip Wilkinson (BM)	Andrew Large (DBM)

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

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