2015

ANNUAL REPORT

avec

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

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

Secretary General:
Cees Vermeeren
cv@avec-poultry.eu

Policy Adviser:
Laura Mazzei
lm@avec-poultry.eu

Paul-Henri Lava
pl@avec-poultry.eu

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

a.v.e.c. *. thanks BPC, CIDEF, ROSE POULTRY, for their contribution to the Annual Report 2015*

INTRODUCTION

«Feeding the Planet, Energy for Life» is the core theme of Expo Milano 2015 held in Milan from May to October 2015.

It is a matter of feeding a growing and more affluent global population, healthily, fairly and sustainably. The millennium development goals for food businesses are reducing emissions, waste and water in their operations and supply chains, while also offering healthier products and better nutritional labelling.
It is an opportunity for the poultry meat industry to demonstrate that it has great potential to take up this challenge of the 21st century.

It is well known that poultry meat combines the advantages of being an affordable and accessible source of protein with low fat content and low carbon emissions without being subject to any religious restrictions. Recent FAO figures show that the poultry sector, which accounts for 35% of global livestock production, contributes only 7% to the total livestock emissions, making poultry the most sustainable meat in the world scene.

Despite the single market in the European Union and the many legally harmonised standards that have been implemented in the 28 Member States, consumer preferences differ between the different Member States. Food business operators in the poultry value chain are facing the big challenge of "matching local demand in an era of globalization" where domestic demand does not necessarily match the preferences of export markets. Consumers, depending on their culture, education and traditions, have different priorities across the EU. According to several opinion polls and studies they show their interest for a product produced in a "sustainable" way, according to high welfare or environmental standards, hygiene and quality etc.
In this context, we should also note that there is no common definition of these factors and often when they get to the cash register, consumer's earth-minded sentiments die on the vine.
The figures for the consumption of poultry meat in the EU also illustrate that the preference for poultry meat differs in the EU. While on average a European citizen consumes annually almost 24 kilos of poultry meat, the consumption of the country with the highest consumption per head, namely Portugal with 39kg/head, is 3 times bigger than the country with the lowest consumption, Sweden, with 11,3 kg/head.

Globally, poultry meat consumption is predicted to overcome pork consumption in 2020 and increase by 27 % through 2023. However, this may largely benefit the EU's main competitors in Brazil, China and the USA, and be less beneficial European producers, thanks to the stricter production standards imposed on EU producers.

Decision makers should take into account the great potential of the European poultry business when negotiating our access to the territory of our trade partners and while considering the relevance of EU livestock industry dependency on the import of (GM) feed.

As well as building food security, we must also insure the safety of our products. In this respect Europe was the only area of the world where food traceability practices were found to be "Superior"[1]. The European system is based on the robust farm to fork policy that, as it is a holistic approach, gives good results based on firm foundations.
In other countries too legislation is amended or introduced to improve traceability; such as by the Food Safety Modernization Act (FSMA) in the USA and also to improve food safety as in the recently published amended food safety law in China.
Learning from our positive experience combatting Salmonella, the poultry sector is now determined and committed to fight Campylobacter.
The introduction of risk-based interventions and a harmonised food chain information system will allow to fully address the most relevant microbiological hazards to public health that are not always easily detected with the current meat inspection system. Therefore, in view of the forthcoming Commission revision of the poultry meat inspection, the European poultry industry believes that poultry meat inspection should focus more on the non-visible microbiological than the visible aspects.

In addition, considering the efforts and the improvements made by the European poultry industry it is crucial to recognise official controls and the costs involved should be risk-based, relevant, and fit-for-purpose. The costs of official inspection should be fairly shared between the private business and the competent authority to promote efficient controls on both private and public.

a.v.e.c. will continue to do its utmost to ensure that the interests of the EU poultry meat producers are defended and promoted towards the European institutions to ensure the long term development of the sector and a fair level playing field competition on the internal and external market.

Paul Lopez
President

Cees Vermeeren
Secretary General

[1] Report published in the September 2014 issue of the peer-reviewed journal, Comprehensive Reviews in Food Science and Food Safety.

“Matching local demand and globalization in the poultry value chain”

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 meat 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 European 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 Members of the European Parliament, a cooperation of key importance.

Objectives
The main objectives of **a.v.e.c.** are to promote and defend the interests of its 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
Since January 2005 **a.v.e.c.**'s secretariat is based 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 analyses 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
In October 2014, during the 57th **a.v.e.c.** General Assembly, Paul Lopez from the French association FIA (Fédération des Industries Avicoles) was elected president of **a.v.e.c.**
The president chairs 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, Piotr Kulikowski from KRD (Poland), Javier Rodriguez from Propollo (Spain), Paul-Heinz Wesjohann from BVG (Germany) and Philip Wilkinson from BPC (UK). The presidency and vice-presidency are elected every two years and are renewable.

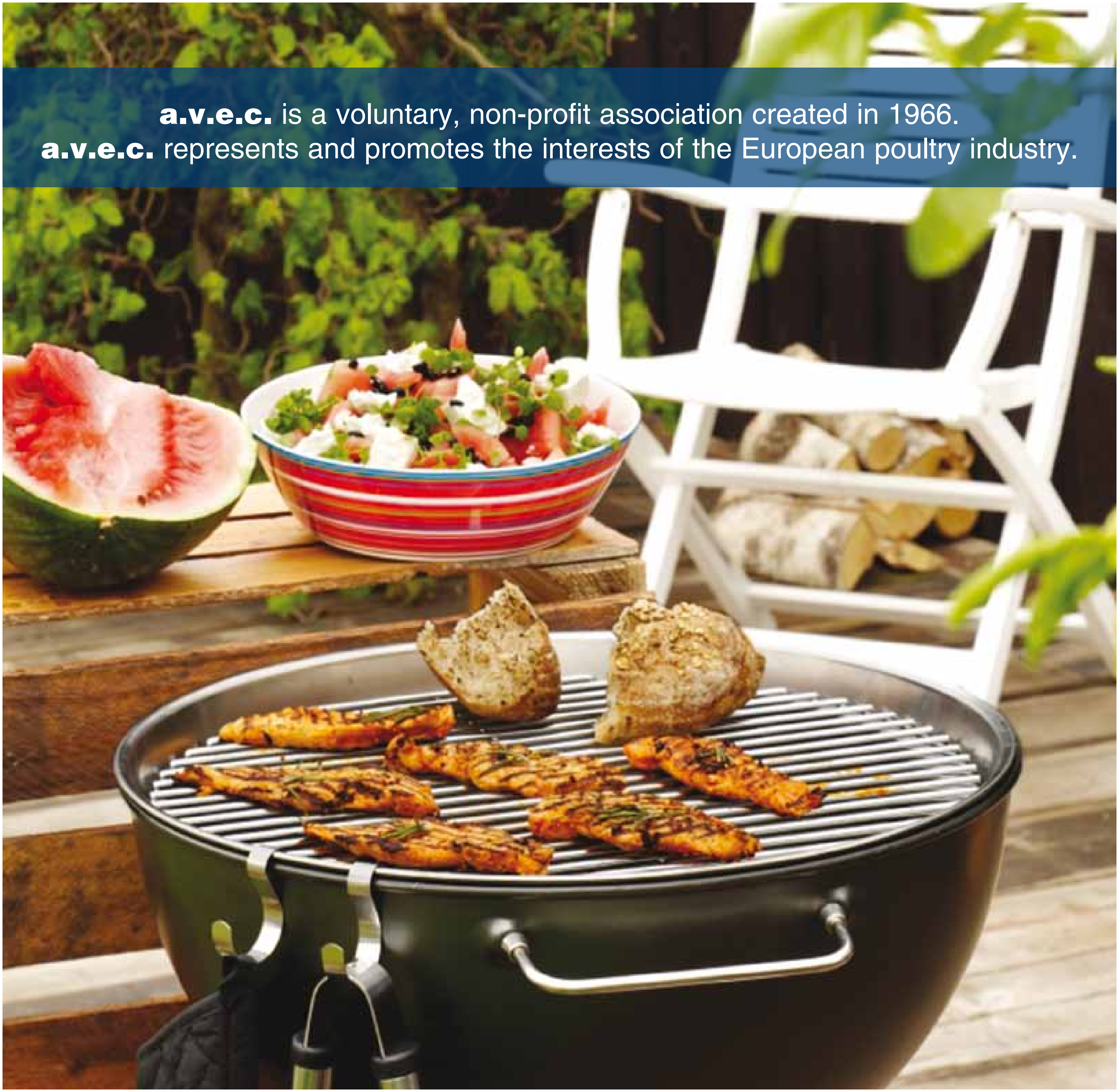
a.v.e.c.'s member organisations are represented in the Board by one Board Member and one Deputy Board Member. Board meetings are held four times a year. **a.v.e.c.** organises its annual reception in connection with the first board meeting of each year to facilitate an exchange of views between board members, officials from the Commission, the European Parliament and other stakeholders. Commission experts are invited to attend the board and working group meetings whenever their presence is considered opportune. The General Assembly takes place on a yearly basis, usually in September/October and up to 150 delegates participate. Speakers from the industry, the EU institutions and from other international organisations are invited to give their views on key issues relevant to the poultry sector.

Creation of Working Groups:
Since 2014 and as part of the re-organization of **a.v.e.c.**'s constitution and to improve the efficiency of the organisation, the **a.v.e.c.** board has decided to create Working Groups on the following issues:

- Trade/promotion
- Animal health/animal welfare
- Food safety/poultry meat inspection
- Environment/sustainability

The working groups meet on an ad-hoc basis when positions and actions need to be prepared on the afore-mentioned issues. The chair of the working group appointed by the Board is responsible for reporting the activities of the Working Group to the board.

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

UNAITALIA – Unione Nazionale Filiere Agroalimentari Italiane Delle Carni e Delle 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

Pro Pollo

AMACO

NEPLUVI

unaitalia

QGV
ÖSTERREICHISCHE QUALITÄTSGEFLÜGELVEREINIGUNG

SVENSK FÅGEL

VIP - BELGIE

bpc

avec

FIA

ETL

BVG

KRD

BTT

ancave

Uniunea Crescătorilor de Păsări din România
UCPR

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 key 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 hosts in its Brussels offices the newly created European Live Poultry and Hatching Egg Association (ELPHA) that represents the interests of the European poultry breeders, hatcheries and exporters of hatching eggs and day-old poultry.
ELPHA contributes to the promotion of the common interests of the European live poultry businesses in the policy area of live poultry and hatching eggs towards the European institutions as the European Commission and the European Parliament. The main interests of ELPHA members are in the areas of EU trade and export, animal health, animal welfare and genetics, while at the same time the base of food safety and security starts with the high quality production of live poultry.
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 EU poultry industry's global competitiveness.

a.v.e.c. also has valuable communication and cooperation with COPA-COGECA, the Committee of Professional Agricultural Organisations and General Confederation of Agricultural Cooperatives in the European Union.
Depending on the issues, **a.v.e.c.** also builds alliances with other European associations in the feed and food (meat) supply chain as 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, FOODDRINKEUROPE, the European Food and Drink Industry, 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 in common positions and letters. For example, some guides to promote 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 22 Country Members and 42 Associate Members.

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.

IPC's 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 the maintenance of a dialogue with relevant international organisations such as the OIE, Codex Alimentarius, FAO, WHO and WTO.

In 2015 the IPC Executive Committee has produced a strategic framework and roadmap designed to move the organization to a new level of effectiveness. The Executive Committee has identified five priorities in the Strategic Planning Summit and roadmap document:

1. Enhance Communication
2. Optimize Cooperation and Interaction with International Organizations
3. Inform and Advise National Programs
4. Recruit New Members
5. Optimize Value through Working Groups

To implement this new strategy, IPC has decided to hire a full-time secretary general, succeeding George Watts, who will retire after serving in the position on a part-time basis. The Brazilian, Marilia Rangel, former foreign markets coordinator with the Brazilian Association of Animal Protein (ABPA), took up the post of secretary general on the 1st of August 2015.

In the years 2014/2015, IPC concentrated its efforts on the situation regarding avian influenza (see below) and on the revision of the chapters in the OIE Terrestrial Code on the welfare of animals at slaughter (Chapter 7.5) and the welfare of animals killed to control diseases (Chapter 7.6). Despite the great work performed by the organization, the amendments proposed were not adopted in the OIE General Session but the text will be subject to further examination and changes could be agreed in 2016.

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: Mr. Wang Jinyou, CFNA, China
Dr. Vivien Kite, ACMF, Australia
Mr. Cees Vermeeren, **a.v.e.c.**, Europe
- Secretary General: Mrs. Marilia Rangel
- 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
- Rome, Italy, 2015
- Xi'an, China, 2015

Summary of the statement released by IPC after Avian Influenza outbreaks:

Following the surge in reported cases of highly pathogenic influenza type H5 and H7 variants in commercial poultry flocks in several geographically distant countries at the end of 2014 and first half of 2015, IPC has published a statement calling for the respect of the measures laid down in OIE Terrestrial Animal Health Code.

The outbreaks have caused several country-wide bans on all poultry imports without consideration of alternate risk-management strategies, causing widespread disruption to trade in both poultry breeding stock and poultry meat. This is why IPC has called for an urgent action from veterinary authorities in all OIE Member Countries "to apply without delay the measures of compartments, zoning and regionalisation established in accordance with the OIE Terrestrial Animal Health Code". This is justified by the fact that Poultry rearing in all countries is highly dependent on imports of modern breeding stock that is essential for the sustainable supply of poultry production. Trade in raw and cooked poultry meat also provides affordable and healthy protein in many regions of the world where demand exceeds production capacity.

This message has been conveyed by all IPC members with the request to circulate as widely as possible and with the suggestion to share it with the officials in their countries.

a.v.e.c. FOCUS

This section gives an overview of the main themes **a.v.e.c.** has worked on during 2014-2015. 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, highlighting the lines for future actions. For more information on the different subjects, we invite you to visit our website: www.avec-poultry.eu.

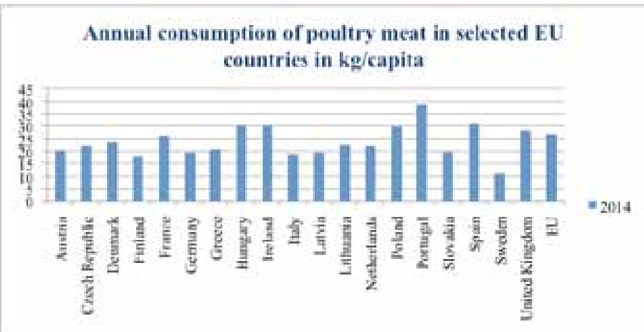
MATCHING LOCAL DEMAND AND GLOBALIZATION IN THE POULTRY VALUE CHAIN

While most of the commentators are predicting a brilliant future for the poultry meat sector, it seems that the major market opportunities will be located in developing countries, and not in developed country markets. On their domestic markets, EU companies are confronted with increased social pressure and consumer demands that are driving up the prices making it difficult for EU companies to compete on external markets.

A very diverse EU market with different consumer preferences:

Although the European Union has imposed many legally harmonized standards, consumer preferences remain quite heterogeneous and we observe many differences between the different EU Member States.

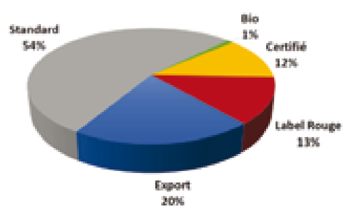
The consumption of poultry meat for example, ranges from 11,3 kg per capita in Sweden to 39 kg/capita in Portugal while the biggest EU country, Germany, is below the EU average consumption (19,5 kg/capita in Germany versus 26,8 kg/capita for the EU average).



Sources: MEG according to EU Commission, national data, FAO and EUROSTAT.

The structure of the national market is also different depending on the country. While in many countries conventional poultry meat represents more than 90 % of the market, the French market has a very particular structure with more than 25 % of the market taken by chicken raised under an extensive rearing scheme.

Allocation of French broiler production by quality signs in 2013



Sources:
FIA (Fédération des Industries Avicoles)

The types of products consumed are also different between EU member states. The majority of poultry consumed today is as cuts and deboned, but we have observed in Spain, following the effect of the economic crisis, a reversal of this trend with an increase of the consumption of whole poultry due to the reduced purchasing power of households.

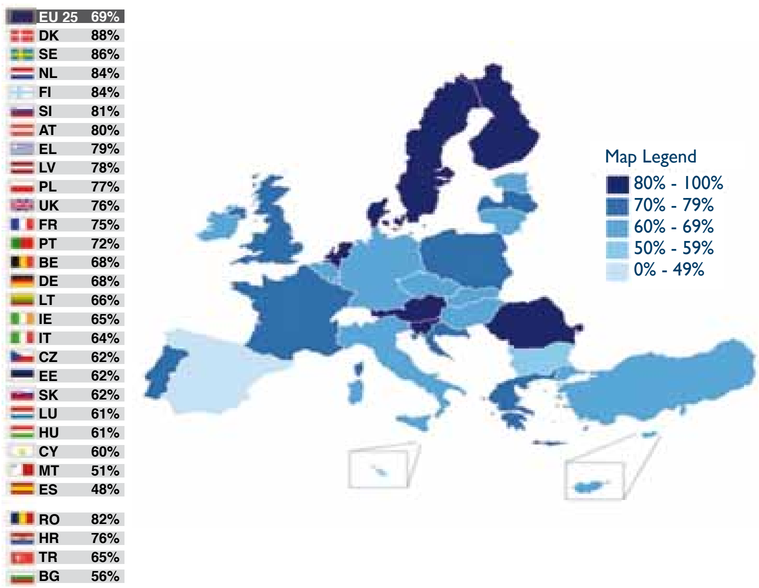
These examples illustrate the heterogeneity of the structure of the EU internal market. In addition to these differences in the structure of the production and consumption, social and societal demands are not exactly the same across the European Union. Consumers, depending on their culture, education and traditions, have different priorities and preferences.

New consuming trends and societal demands:

Poultry production is regularly challenged by the civil society and NGO's pressures that force the EU producers to continuously improve and adapt their methods of production in particular regarding animal welfare. The last Eurobarometer on Animal Welfare dates from 2007 and showed significant differences in perception and knowledge of animal welfare between citizens in the EU countries:

Question : QC1. Could you tell me how much do you feel you know about the conditions under wich animals are farmed in (OUR COUNTRY)? Would you say that you know ...?

Answers: A lot + A little



A new EUROBAROMETER survey on animal welfare is scheduled to be launched in 2015 and we are very interested to learn what the situation is today.

In addition to animal welfare rules, a growing 'buy local' trend has emerged in the EU while new EU legislation on country of origin labelling for fresh meat from pigs, sheep, goats and poultry has been introduced. It aims at informing the consumers on the origin of the meat and displaying the country of origin of the rearing and slaughter stages. In addition, the European Parliament, through a resolution[1], has urged the Commission to act on the indication of the origin of the meat used as an ingredient. This push for the publication of the origin of meat favored by the EU institutions might be considered contradictory with the promotion by the same institutions of the opening of the EU markets to international trade in bilateral trade agreements, creating tougher competition for EU producers with low-cost producers from outside the EU.
The use of GMOs and antibiotics in food production and the environmental impact of poultry meat production are other examples of societal concerns that have led or might lead to new legislation from the EU authorities. But in each of these issues, the perception and the degree of sensitivity of consumers is different among the different Member States.

How to be competitive on the global market place while remaining leader on your domestic market?

Very often these high societal expectations do not reflect the willingness of consumers to pay for the cost of these improvements and pressurize the margins of all actors in the poultry meat production chain. Nevertheless, given that market opportunities may be located in emerging countries with lower purchasing power in the coming years, EU producers have to find a way to convert these local constraints into opportunities in the global market place if they want to expand out of their domestic market.

The "glocalization" concept has been used by many businesses as a basis of their multi-national companies and is considered as a basic concept to be successful for expanding abroad. It means that "in a global market, a product or service is more likely to succeed when it is customized for the locality or culture in which it is sold". In a way, it consists in recognizing that markets are diverse around the world and companies should balance and adapt their interests between global corporate philosophy and local practice and culture. In the EU there are already many local specificities which confer some experience to companies operating cross border.

The last Rabobank report "Poultry in motion" makes an analysis of several solutions for future success in EU poultry meat industry and to adapt to this changing environment.
Here are the 10 rules proposed by the analyst:

Ten golden rules for winners in the EU poultry industry

1. The customer is king. Invest in market intelligence and product development.
2. Be the category captain. Invest in #1 positions as the preferred supplier of winning supermarkets, QSRs and food companies.
3. Consolidate your market, think outside country lines with a fresh 1,000 km sales radius as base.
4. Scale up or find a niche. The middle segment will disappear and companies will need to choose.
5. Optimal efficiency of the whole value chain is more important than ever.
6. Improve your value chain model to fit the new market reality.
7. Participate in social debate and be prepared for NGO pressure.
8. Optimize the value of individual cuts and offal streams to increase revenues and profitability.
9. Exploit your industry and client knowledge, and follow your customers. Expand in new markets.
10. Reconsider your capital structure. Family ownership has been the dominant model, but does it fit with future challenges?

In particular, rule number 1 invites producers to adapt to customer demand, implies that poultry businesses should invest in resources to better understand the characteristics of the customer markets in which their companies operate. This expertise, once applied on the domestic market, can be used the same way to understand the particularities of the foreign markets and to try to adapt to new consumer preferences.
Rule number 3 implies that EU producers will have to expand their customer catchment area to a region that is not necessarily situated inside their country borders. The extension of the business may be pan-European and even in markets that are in non-EU countries.
Rule number 4 encourages producers to specialize in niche markets that are predicted to grow rapidly and where margins are higher, in particular "ethical products", regional products or products with quality schemes. These products that may have a good growth potential not only in EU countries but also in many third countries where a more affluent class is developing that can afford to buy these types of products and that is becoming more sensitive to these trending issues. But actually the ongoing volume production of poultry meat will remain dominant while the business operators will continue to optimize efficiency and to improve the value chain model.
Rule number 7 is also important for EU producers. Consumer understanding of the issue of bird welfare and social pressure is predicted to increase and EU producers have understood that it will not be possible to resist. Instead they should lead the change in attitudes by trying to raise knowledge of the welfare efforts that they make and avoid with the imposition of rules that are based on false perceptions or lack of scientific evidence.
Rule number 9 may allow EU companies to find market opportunities in third country's markets as well by creating synergies with partners (suppliers, distributors) from their domestic market that are already active in these third countries. By extending the trust they have acquired on their domestic market, EU companies may benefit from the experience of their partner to better adapt to the cultural specificities of the market they are targeting.

These examples of opportunities show how EU companies may benefit from the experience acquired on their domestic market to find new opportunities in third country markets. While the requirements imposed on EU poultry meat producers are very often seen as barriers to export and as restraints on opportunities, they might also give them an advance in a changing world where societal demands are growing elsewhere.

Sources:

http://ec.europa.eu/food/animals/welfare/practice/farm/index_en.htm
http://ec.europa.eu/food/animals/welfare/practice/farm/broilers/index_en.htm
http://ec.europa.eu/food/animals/welfare/practice/slaughter/index_en.htm
http://ec.europa.eu/public_opinion/archives/ebs/ebs_270_en.pdf
https://www.rabobank.com/en/press/search/2015/poultry_tenrules.html

[1] http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+MOTION+B8-2015-0097+0+DOC+XML+V0//EN

ANIMAL WELFARE AND HEALTH

Presentation of the a.v.e.c. working group on animal health and animal welfare by the chair, Harald Schliessnig

The objective of the Working Group is to prepare **a.v.e.c.** positions on animal health and welfare related issues and present them thereafter to the avec board for adoption after final discussion. The first meeting took place in Brussels on 28th of February 2015 and the call for experts was well supported. Experts from eight **a.v.e.c.** Member States joined the first meeting. The participants appointed representing the poultry business and poultry associations are Chair Harald Schliessnig (Aut) Paul Lopez PL (FR and avec President), Julie Mayot (FR), Pia Gustafsson (SWE), Máire Burnett (GB), Christina Nygaard (DK), Mark den Hartog (NL), Nicolò Cinotti (IT), Dirk Höppner (DE) and Gyorgy Endrodi (HU).

Animal welfare was one of the topics in the first meeting. In all different stages from farm to slaughterhouse the business operators are challenged to demonstrate that the welfare of the birds is well respected. The introduction of welfare indicators has provided the tools to survey, evaluate, adjust and improve the situation. Nevertheless, with not all countries having implemented the monitoring of welfare indicators as food pad lesions, this will be a great challenge for the future to implement comparable systems in all Member States.

As regards welfare during transport the Commission seems to be keen to enforce the existing Regulation (1/2005) before considering a revision of the Regulation or other possible modifications.

a.v.e.c. will continue to work on a poultry transport guide which is expected to be published at the end of 2015. This guide aims to offer a general recognized tool to relevant actors involved in the process of transport of poultry from farm to slaughterhouse.

Biosecurity is still one of important issues in producing poultry. The TTIP discussion in the poultry sector focuses on the differences in food chain policy and practice with great attention to the use of chemical meat decontamination in the United States of America at the end of the chain, which is only one example of the differences.

Avian Influenza (AI) and the problems caused this year by several outbreaks of highly pathogenic avian influenza (specifically H5N8) have received significant attention. Unfortunately the European regionalisation policy is not recognized by all countries outside Europe. It is the impression that third countries are using these outbreaks as an unjustified trade barrier. The measures taken in the countries affected by HPAI in the EU were very much similar, most countries restricted free range poultry to have free access outside the houses sometimes even as a preventive measure, and other authorities enforced a strict system which banned the transport of any bird for a number of days.

In conclusion the implementation of the AI directive may still be slightly different depending on the Member States. From the epidemic point of view it is clear that new subtypes like H5N8 with low mortality in wild birds may evoke outbreaks in commercial poultry. The high mortality rate in farmed poultry is a threat to the globalized poultry industry.

The issue of antimicrobial resistance puts into question how antibiotics are used in all livestock sectors. The appropriate use of antibiotics in light of antimicrobial resistance strategies is part of the ongoing discussion in Europe. The first ECDC/EFSA/EMA joint report on the integrated analysis of the consumption of antimicrobial agents and occurrence of antimicrobial resistance in bacteria from humans and food-producing animals was published this year. We hope that this new approach will help both public and animal health sector to have a clearer and more constructive debate.

The European poultry sector fully supports the national antibiotic reduction programs, but is also advocating coordination on EU level which may make the policy more efficient and effective.

Schliessnig Harald,
Chair of the Working Group
on Animal Health and Animal Welfare

Avian Influenza from 2014 to 2015

From early November 2014, HPAI was detected globally, including in regions with no previous history of infection. In Europe all affected Member States have immediately taken measures according to the EU legislation on the control of avian influenza (Council Directive 2005/94/EC[1]).

The role of wild birds in spreading the disease is under investigation and the regionalisation approach has been implemented.

Avian influenza is a serious threat for the poultry sector and it has heavily impacted both the animal health status and production in Europe. Therefore it is essential in order to manage outbreaks and to facilitate safe international trade to implement the robust measures recommended by the OIE Terrestrial Animal Health Code, and ensure that they are followed by the veterinary authorities in all countries.

The European poultry industry continues to cooperate with the European Institutions, the Member States and the Competent Authorities to monitor and proactively act in order to always ensure the best biosecurity measures. **a.v.e.c.** in coordination with IPC asked OIE [2] to continue to give all possible encouragement to OIE Member Countries to adhere to the measures to which they have all jointly agreed.

[1] Council Directive 2005/94/EC of 20 December 2005 on Community measures for the control of avian influenza and repealing Directive 92/40/EEC - http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32005L0094

[2] Statement by the International Poultry Council on influenza outbreaks and measures in the OIE Terrestrial Animal Health Code to safeguard continued trade in poultryhttp://www.internationalpoultrycouncil.org/documents/IPCSTATEMENTTOOIE.pdf

Animal health

On the 1st of June 2015 the European Parliament and the European Council reached a provisional agreement on the Animal Health Law (AHL)[3] at an informal trilogue meeting. The regulation is expected to be formally adopted before the end of 2015 and after the final procedures including the legal linguistic revision the text will be completed. It will be applicable five years after its entry into force.

a.v.e.c. welcomed the proposal and is willing to actively cooperate and discuss with the European Commission and the Member States to ensure a harmonized enforcement and definition of the delegated and implementing acts.[4]

Welfare : harmonised framework

The European Commission is in the process of drafting a new animal welfare policy. In June 2015 during the conference "Animal welfare: a way to preserve diversity and quality in animal productions" organized by DG SANTE in the framework of the EXPO Milan events, the European Commission called on all livestock stakeholders to present their inputs and ideas to create and deliver a new and effective action plan as regards animal welfare.

a.v.e.c. is ready to cooperate and assist the Commission in developing simpler and harmonised animal welfare standards and indicators to implement and develop a more sustainable and quality livestock system.

The European Commission must act carefully to ensure that higher EU animal welfare standards do not damage EU meat exports, nor that imports into the EU can continue at lower standards. Products entering from third countries must comply with EU legislation. Therefore it is important to reflect on the challenges the food business operators will face from the costs of higher animal welfare standards that will or cannot be reflected by a higher price on the shelf because consumers cannot afford such increases.

Transport of animals

According to the new European rulemaking approach which intends to enhance the two sides of the same coin "better regulation and better enforcement", the Commission wishes to improve the enforcement of Council Regulation (EC) No 1/2005 on the protection of animals during transport [5].

Transport of animals is a sensitive topic which is a key issue for several European stakeholders, therefore the Commission has launched a project with the aim to define useful best practices in the different sectors.

The protection of animals during transport as demonstrated in the past has always been a priority for **a.v.e.c.** members who are willing to clarify the current legislative framework and to comply with the relevant provisions at national level.

The enforcement and control of the framework Regulation 1/2005 is delegated to national Competent Authorities meanwhile **a.v.e.c.** in coordination with other stakeholders is committed to develop a European poultry transport guide to provide an overview of the provisions laid down in the legislative text. Moreover, the guide aims to give explanatory information and harmonize the current level playing field trough the identification of good practices and the creation of a checklist to facilitate transport management.

Recently the European Commission has granted the "Hennovation" project to a consortium of seven partners from the UK, Sweden, Czech Republic, Spain and the Netherlands. The project is aiming to develop and disseminate technical innovations based on practice as well as on economic and scientific information to increase sustainability of the laying hen sector. Initially the project's focus is on tackling the injurious pecking in egg-laying flocks and the sustainable after-use of end-of-lay hens. **a.v.e.c.** will participate in the Project Advisory Board [6].

[3] General Q&A New EU Regulation on transmissible animal diseases («Animal Health Law») June 2015- http://ec.europa.eu/food/animal/docs/qanda_ahl_porposal_062015_en.pdf

[4] NON PAPER- Proposal for a Regulation on Animal Health: delegated and implementing act -http://ec.europa.eu/food/animal/docs/ahl_da_and_ia_en.pdf

[5] Council Regulation (EC) No 1/2005 of 22 December 2004 on the protection of animals during transport and related operations and amending Directives 64/432/EEC and 93/119/EC and Regulation (EC) No 1255/97 (Consolidated version)
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:02005R0001-20050125

[6] Link to project website: www.hennovation.eu

Implementation of Regulation 1099/2009

The most recent FVO audits outcomes have identified a gap in the enforcement of the Council Regulation (EC) No 1099/2009[7] on the protection of animals at the time of killing in particular regarding electrical waterbath stunning parameters for chickens which were not being respected in many Member States, without any enforcement measure or action occurring.

In 2015 **a.v.e.c.** attended the Info session[8] on the EFSA guidance on assessment criteria for stunning methods. The poultry industry is working on both improving the implementation of electrical waterbath stunning and tackling the negative impact of the stunning requirements on meat quality. Cooperation with the Commission to collect more data from practice and science may help to improve the situation.

Further to this the European Commission is now analysing the outcomes of the external study commissioned by DG SANTE examining whether there is consumer demand for information on the stunning of animals prior to slaughter. The outcome of the survey and consultation shows that for the majority of consumers information on pre-slaughter stunning is not an important issue unless brought to their attention. Moreover there is little accurate consumer understanding of the slaughter process.

GMO

In April 2015 the European Commission adopted the package on GMO[9] which comprises the following documents:

- A Commission Communication reviewing the decision-making process on genetically modified organisms; and,
- A proposal for a Regulation allowing Member States to restrict or prohibit the use of GMOs for food or feed purposes in their territory.

The Commission proposes to amend the Regulation on genetically modified food and feed, to allow Member States to adopt national decisions restricting or prohibiting the use in food or feed of GMOs, after they have been authorised at EU level (opt-out measures).

Member States would have to justify that their opt-out measures are compatible with EU law and the principles of proportionality and non-discrimination between national and non-national products. However, they are not allowed to use justifications which conflict with the assessment of risks to human and animal health and the environment carried out by the European Food Safety Authority (EFSA).

Meanwhile the situation in the EU is clear: the EU poultry industry, and more in general the livestock industry, has to import substantial quantities of raw materials for (poultry) feed from third countries where the cultivation of GM varieties is increasing and not all of them are approved in the EU. The situation will be further complicated as the Commission's proposals will completely distort the level playing field between EU producers in the different Member States. So most likely producers in the countries that are not using an opt-out will be affected by the opt-out of other Member States. At the end, the European poultry industry may expect lower/no increase of production, and even a decrease on the longer run especially in the countries with an opt out.

Therefore **a.v.e.c.** joined the EU food and feed chain (FFC) coalition requesting the European Parliament and the Council – Guardians of the EU Treaty – to reject this proposal from the Commission.

Appropriate use of antimicrobials

The discovery of antimicrobial agents, such as antibiotics, has transformed the treatment of infectious diseases in both humans and animals. The poultry industry encourages and enforces the responsible use of antimicrobials. Further to this, good husbandry systems, biosecurity, feed hygiene and the veterinary prescription supported by an antibiogram are promoted. This has already resulted in a dramatic reduction of the use of antibiotics in a number of Member States.

a.v.e.c. welcomed the European Commission's aim to address the issue of antibiotic resistance (AMR) in 2011 with the definition of a 5 year Action Plan against Antimicrobial Resistance[10] and shares the principles identified by the European Platform for Responsible Use of Medicines in Animals - EPRUMA.[11]

Meanwhile the Commission is supporting international trade by trade agreements and it is essential that the European Commission ensures also a strong collaboration with international organisations such as WHO, FAO and OIE in view of the global nature of AMR.

It is known that restriction of the use of certain antimicrobials may affect the competitiveness of certain animal production sectors. Therefore the European poultry industry advocates identical conditions and standards for products from third countries entering the EU to ensure fair trade and high safety and quality to the consumers.

[7] Council Regulation (EC) No 1099/2009 on the protection of animals at the time of killing

[8] Info session on the EFSA guidance on assessment criteria for stunning methods - http://www.efsa.europa.eu/en/supporting/doc/835e.pdf

[9] Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL amending Regulation (EC) No 1829/2003 as regards the possibility for the Member States to restrict or prohibit the use of genetically modified food and feed on their territory - http://ec.europa.eu/food/plant/docs/plant_gmo_authorisation_proposal_regulation_en.pdf

[10] Evaluation of the Action Plan against the rising threats from Antimicrobial Resistance (AMR) (COM (2011) 748) http://ec.europa.eu/smart-regulation/roadmaps/docs/2015_sante_521_evaluation_antimicrobial_resistance_en.pdf COMMISSION STAFF WORKING DOCUMENT - Progress report on the Action plan against the rising threats from Antimicrobial Resistance -http://ec.europa.eu/health/antimicrobial_resistance/docs/2015_amr_progress_report_en.pdf

[11] European Platform for Responsible Use of Medicines in Animals - EPRUMA. www.epruma.eu

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

The safety of the meat and poultry is of the utmost importance for European producers and consumers. On 23rd of May 2012, EFSA adopted its Scientific Opinion on the public health hazards to be covered by inspection of meat (poultry) (EFSA Journal 2012;10(6):2741).[1] **a.v.e.c.** studied this opinion and elaborated its position on the future poultry meat inspection (PMI).

Meat and poultry inspection at slaughter is essential for ensuring human health and the health and welfare of food animals, but it needs to be modernized to take into account current priority public health hazards such as Salmonella and Campylobacter.

Furthermore it is essential to ensure a better harmonization in the implementation of Regulation 854/2004[2] in the different Member States.

It is expected that by the end of 2015 the Commission will launch a consultation with relevant stakeholders and Member States regarding the revision of the Hygiene Package and Meat Inspection.

a.v.e.c. welcomes the intention of the Commission to start the Poultry Meat Inspection (PMI) revision and stresses that the role and responsibility of both the food business operator and the veterinarian executing the official inspection needs to be considered in the revision. It's for this specific purpose that an **a.v.e.c.** expert PMI Working Group proactively drafted a set of documents: food chain information (FCI) and annexes on hygiene in the slaughterhouse to create more transparency across the European Union. FCI is a valid tool with a great value especially in a sector as integrated as poultry meat, the incorporation of the FCI in a comprehensive data management and review system may speed up and facilitate the exchange between the different partners in the value chain. **a.v.e.c.** hopes that rapid progress may be made despite the time consuming decision making with involvement of MSs and European Parliament.

Campylobacteriosis

EFSA reported that with over 190,000 human cases annually, campylobacter[3] is the most frequently reported food-borne bacteria in the EU, costing an estimated EUR 2.4 billion a year to health systems.

Ensuring a high European food safety and health protection system is core for the Commissioner Vytenis Andriukaitis: "Europe should be proud that its 500 million consumers benefit from the highest food safety standards in the world and that many other countries take them as the norm to be followed." [4] Therefore the challenge of tackling campylobacter is a top priority for the Commissioner for Health and Food Safety.

It is expected that DG SANTE will launch a consultation on this issue together with the one on the revision of the poultry meat inspection. **a.v.e.c.** is strongly committed to cooperate with the Commission on the definition and implementation of necessary interventions. Moreover, through these measures it is important to efficiently spend resources and select the interventions that fit into the "farm to fork approach". The European poultry industry aims at a harmonized approach to tackle campylobacter that will not distort the level playing field in EU or with third countries.

[1] Scientific Opinion on the public health hazards to be covered by inspection of meat (poultry) http://www.efsa.europa.eu/it/efsajournal/pub/2741.htm

[2] 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 - http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32004R0854

[3] EFSA topics – Campylobacter- http://www.efsa.europa.eu/en/topics/topic/campylobacter.htm

[4] World Health Day: Commissioner for Health and Food Safety Vytenis Andriukaitis joins forces with the World Health Organisation to highlight the importance of food safety - http://europa.eu/rapid/press-release_STATEMENT-15-4740_it.htm

Peroxyacetic- acid / chemical decontamination

In light of the forthcoming revision of the poultry meat inspection, the Commission is expected to launch public consultations after summer 2015 on possible substances for the chemical decontamination of poultry meat.

Already in 2014, following a submission from the US, the European food safety authority (EFSA) under mandate of the Commission assessed the risks of peroxyacetic acid (PAA) solutions when used on poultry carcases and meat[5]. We recall that in the recent past EU national governments were almost unanimously opposed to the proposal to introduce a number of substances to treat poultry carcasses and historically the Member States were also clearly against 'chlorinated chicken' from the US.

a.v.e.c. members believe that the European legislation, strengthened by solid science and rigorous controls, is the cornerstone of our "from farm to fork" concept. As a result, European citizens can enjoy safe and nutritious food produced from healthy animals, whilst enabling the European poultry industry to operate under the best possible conditions. Why should the EU bargain away the current European standards based on precaution and replace them with a system based on ex-post decontamination and risk management? This approach would lead to poorer biosecurity and hygiene standards, as well as harm the health of workers in abattoirs and the environment due to chemical pollution.

European consumers are not willing to accept chicken cleaned with any disinfectant except potable water, and the European consumer organisation BEUC strongly insists that health and safety should be put ahead of a desire to improve trade relations with the US[6].

MEAT and MECHANICALLY SEPERATED MEAT

What is meat and what is mechanically separated meat (MSM) according to the definition in Regulation 853/2004 is object of dispute between the meat industry and the European Commission for many years. In October 2014 the European Court of Justice issued a judgement in the case between Newby Foods and the Food Standards Agency in the UK.

In the judgement of the Newby case it is confirmed that all three elements (mechanical means, flesh bearing bones and poultry carcass and the modification or loss of the fibre structure) in the definition of MSM have to be met for the qualification of the product being MSM.

The Commission communicated to the Member States that a product which originates from a poultry carcase which is obtained by mechanical separation by which the muscle fibre structure is modified, has to be considered MSM. As the poultry cuts with bone-in are obtained from a poultry carcase by using mechanical separation which modifies the muscle fibre structure, the latter also fulfil the three MSM definition criteria.

a.v.e.c. believes that the interpretation of MSM by the Commission is contrary to the definition in Regulation 853 and that the Commission's action undermines common custom and practice, and weakens the competitive position of the European poultry industry.

Fragmented meat manually separated from bones is defined as meat but if it would be separated by mechanical means it would be MSM. In summary we believe that scraps of muscle removed from bones, such as recovery from wishbones, does not fall within the definition of MSM. It should more fairly be viewed as fresh meat fragments arising from scrap cuttings or scrap trimmings, and therefore continue to be available for use in meat preparations intended to be consumed after heat treatment, and meat products. We believe that the flexibility for technology allowed for in Regulation 853/2004 is not intended as a catch-all for MSM, but to differentiate from MSM when innovation provides new solutions in food production. The aforementioned fresh meat fragments are a valuable resource that contributes to the sustainable production and use of poultry. In removing it from meat content the Commission will be eliminating quality protein from the food chain, and potentially creating a gap in the market for cheaper imported meat, or possibly for fraudulent substitution. It is good for Europe that its poultry industry is strong and competitive in the marketplace with third countries, and the position of the Commission will undermine that effort.

[5] Scientific Opinion on the evaluation of the safety and efficacy of peroxyacetic acid solutions for reduction of pathogens on poultry carcasses and meat - http://www.efsa.europa.eu/it/efsajournal/pub/3599.htm

[6] What is wrong with chlorinated chicken - by Monique Goyens - BEUC - http://www.beuc.eu/blog/what-is-wrong-with-chlorinated-chicken/

ENVIRONMENT/SUSTAINABLE PRODUCTION

The issue of sustainability is a topic of great interest for poultry meat producers in an industry that is fully committed to address the challenge imposed by climate change. They consistently invest to adapt their production systems in order to improve the overall environmental efficiency along the supply chain.

Through different initiatives and projects at EU and International level, **a.v.e.c.** has participated in the efforts made by the poultry meat industry to improve its environmental performance. However it is essential that the sustainability policy is viable and therefore the economic, social and environmental pillars or components need to be well balanced.

Sustainability of the poultry meat production:

The production of food and meat in particular, is often blamed for wasting natural resources and for its negative impact on the environment. It is has been suggested that conventionally indoor reared poultry would be less sustainable than more extensive production systems as free-range and organic poultry. But due to better conversion of the feed intake into protein the meat from conventionally indoor reared poultry has lower emissions levels to the environment and may be offered at a price that is affordable for more citizens. This should be highlighted in the promotion of sustainable meat production since the theme of sustainability is not only linked to environmental sustainability, but also to secure access to food (food security) and to economic sustainability of the sector. In the context of the growing demand for food, the focus of the Community institutions and the food industry should be on both satisfying societal demands and the guarantee of access to high quality and price-affordable foods for all citizens.

This is why we cannot accept that that image of intensive poultry production is continuously harmed by unjustified attacks.

International initiatives

a.v.e.c. is, through its affiliation to IPC, actively participating in the LEAP program (Livestock Environmental Assessment and Performance) driven by the UN FAO. The aim of this multi-stakeholder partnership initiative is to develop broadly recognized sector specific guidelines (metrics and methods) for monitoring the environmental impact of the livestock sector that will result in a better understanding and management of the key factors influencing the sector's performance.

These guidelines, by providing tools to identify and manage the key-factors in each sector, will allow improvement of the environmental impact of each livestock sector.

Draft guidelines for feed, poultry and eggs and small ruminants have been developed by the FAO-led LEAP. 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. By IPC the European poultry industry is also engaged in the FAO platform of the Global Agenda for Sustainable Livestock (GA).[1]

European initiatives – Industrial emissions directive

The European Commission must adopt BAT conclusions containing the emission levels associated with the BAT (best available techniques) that shall serve as a reference for the drawing up of permit conditions. **a.v.e.c.**, through its working group dedicated to this issue, has followed and participated to the revision of the BREF Food, Drink and Milk that deals mainly with the further processing of the meat for the poultry meat sector. However the main focus of the WG has been on the BREF for slaughterhouses, for which the review will start at the end of the year 2015. This BREF will define the emission levels for slaughtering activities and directly impacts the core activities of **a.v.e.c.** members. The WG has analyzed the document and already prepared a full list of comments in order to update and modernize the requirements anticipating the Commission's revision of the document.

In general terms, industrial installations should use the best available techniques to achieve the optimal level of protection of the environment, under economically and technically viable conditions meaning that a degree of flexibility is indispensable to reflect different conditions of production across Europe.

Processed Animal Protein (PAP)

The ban on the use of meat and bone meal for animal feed, in force since 2001 as a preventive measure against the Transmissible/Bovine Spongiform Encephalopathy has increased the dependence of our market from third countries (Brazil, USA) with regard to protein supply (especially soybean), which contributed to the lowering of the environmental performances of the sector. The 2007 EFSA opinion has been clear on the absence of risk in the use of meat meal for the feeding of non-ruminant animals. But it appears very hard to develop and validate a test that excludes the possibility of intra-species use of animal proteins, as required by the regulation on animal by-products. The reintroduction of the use of Processed Animal Protein and the development of a validated test as required by the regulation would diminish our dependence from fluctuations in the market for protein sources and would also lead to a reduction of food waste. Such an authorization would improve the sustainability of the sector and therefore we strongly encourage the EU authorities to facilitate the adoption of PAPs from pork origin for poultry feed.

[1] See http://www.livestockdialogue.org/en/

MARKETING STANDARDS - LABELLING OF POULTRYMEAT- ORGANIC FARMING

Quality is the sine qua non of the viability of the business for every poultry meat producer in the EU, to enable the delivery of products satisfying high consumer expectations. EU law lays down stringent requirements guaranteeing the quality of European products. EU mandatory and voluntary labelling rules mean that European consumers get comprehensive information on the contents and the composition of food products.

In particular Regulation 1169/2011 on the provision of food information to consumers introduced several changes to the existing legislation on food labelling enabling consumers to make an informed choice. The provisions of this legislation entered into force on the 13th of December 2014.

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. New rules of origin have been introduced for the labelling of fresh poultry meat since 1st of April 2015, while for meat used as an ingredient; discussions are still ongoing following the resolution from the European Parliament calling for legislative action from the Commission.

Mandatory labelling of fresh poultry meat

The new legislation adopted on the 13 December 2013[1], introduces the mandatory labelling of the place of rearing and slaughter for fresh poultry meat. Labels must indicate 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)».

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 applies since the 1st of April 2015.

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. The report highlighted the "overall strong consumer interest in origin labelling", but explains that it is not reflected in consumer «willingness to pay». Since then, on the 4th of February 2015 the European Parliament has adopted a non-binding resolution[2] where MEPs «urge the Commission to follow up its report with legislative proposals making the indication of the origin of meat in processed foods mandatory in order to ensure greater transparency throughout the food chain». Discussions are still ongoing and the Commission appears to be waiting for the Council's views before making a formal proposal.

EU poultry meat producers believe it is necessary to increase the awareness of EU consumers about the origin of the meat especially since meat imported from 3rd countries may not be fully compliant with the standards that meat produced in the EU has to satisfy. The EU should make greater efforts to provide consumers with knowledge about the differences in standards between meat from the EU and from third countries and the reasons for those differences. This concerns not only household purchases but also away from home consumption, since a significant proportion of the meat imported from 3rd countries (mainly Brazil and Thailand) is consumed in mass catering, food service or as meat preparations. Communication about the origin of the meat offered by these channels is therefore also essential.

As a result, **a.v.e.c.** is advocating the mandatory labelling of all products containing more than 25 % of poultry meat with the name of the country for products containing meat from animals reared either in or outside the EU.

[1] REGULATION (EU) No 1337/2013laying down rules for the application of Regulation (EU) No 1169/2011 of the European Parliament and of the Council as regards the indication of the country of origin or place of provenance for fresh, chilled and frozen meat of swine, sheep, goats and poultry

[2] See: http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+MOTION+B8-2015-0097+0+DOC+XML+V0//EN

Marketing standards

The Commission has started consulting Member States and stakeholders about 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.

The intention of the authorities to create a horizontal legal framework defining the basic requirements for all animal species is not seen as a positive development by the sector which favors the maintaining of specific marketing standards for poultry meat. Indeed, our sector has specificities that require dedicated legislation and legislative consolidation in this field will not be a progress for our sector.

The poultry meat sector has already presented to the Commission its ideas about the modification of the definitions, the chilling methods, the origin labelling and the requirements, registration and record keeping applicable to different types of farming.

The inclusion of a new system of mandatory information about the farming system in the marketing standards, similar to the egg labelling system, is not seen to add value by the producers who would like to keep the voluntary labelling of farming systems. This labelling would not improve the transparency of the different labelling systems for consumers and would even create confusion for consumer understanding of the different farming systems and quality schemes. Today consumers that are looking for specific products may find them using the existing voluntary labels. Furthermore the labelling of the farming system by a number will contribute to the false perception of the consumers that are confusing farming system and animal welfare, since free-range or organic poultry are for example excluded from the scope of the broiler welfare directive.

In general terms, the future marketing standards should not obstruct the introduction of new technologies that may improve the safety and quality of poultry meat while allowing consumers to make informed choices.

Organic Farming

On 24 March 2014 the European Commission adopted the legislative proposal for a new Regulation on organic production and labelling of organic products. The proposal received a cold reception from the stakeholders of the poultry meat sector and from many national governments. Despite this opposition, the proposal is currently following the traditional legislative procedure in the European Parliament and Council and an agreement is expected to be reached by the second part of the year 2015.

As regards the issues for the poultry sector, the Commission and the Parliament have been alerted to the risk of ending the derogation allowing organic farmers to rear organic poultry issued from non-organic breeds since the low economic interest in developing 100 % organic breeds may lead to restricted supply in some EU member states.

In addition the provision requiring mandatory access to outdoors for the very specific activity of the breeding of the birds could pose a serious risk for the health status of the whole poultry chain and would create difficulties in compliance with the EU zoonosis regulation. Linked to that, the recent Avian Influenza outbreaks have shown the important role of the wild bird population in the dissemination of the disease. Therefore, in case of recognized outbreak and in high risk periods during wild bird migration, authorities should be granted the competence to forbid the outdoor access in a defined zone where the risk of dissemination of the disease is high, while guaranteeing the organic certification of the producers. The supply of organic feed is also a problem for the organic poultry meat sector and it is therefore vital for the sector to maintain the 95% organic diet rule for poultry with the possibility to introduce 5% of non-organic protein feed, and a requirement of 20% local sourcing of the feed.

A joint ELPHA and **a.v.e.c.** proposal for amendments to the proposed regulation has been tabled to influence the EU institutions in order to preserve the interests of the EU organic poultry producers.

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

Proposal of the Commission for a regulation of the European Parliament and of the Council on organic production and labelling of organic products, amending Regulation (EU) No XXX/XXX of the European Parliament and of the Council [Official controls Regulation] and repealing Council Regulation (EC) No 834/2007: http://ec.europa.eu/agriculture/organic/documents/eu-policy/policy-development/report-and-annexes/proposal_en.pdf

Annexes to the proposal: http://ec.europa.eu/agriculture/organic/documents/eu-policy/policy-development/report-and-annexes/proposal-annex_en.pdf

Draft report from MEP Mr. Häussling on Organic Farming:
http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-%2f%2fEP%2f%2fNONSGML%2bCOMPARL%2bPE-557.122%2b01%2bDOC%2bPDF%2bV0%2f%2fEN

TURKEY SECTOR 2015

by Gilles le Pottier, chair of the Turkey Working Group

Turkey production in the EU is concentrated in a small number of Member States. Five countries (Germany, France, Italy, the UK and Poland) produce more than 80 % of all EU turkey meat. The number of companies in the turkey primary breeding sector is even smaller as only a few companies in a limited number of Member States are involved.

Market situation of turkeys

Turkey production has broadly stabilized since 2013. On the European stage, Germany and Poland are seeing their production grow, while other countries are struggling to maintain the same levels of production. The year 2015 has begun with more favorable indicators in particular resulting from lower commodity prices. The industry should however remain prudent because turkey production is more sensitive than other livestock production to changes in commodity prices. Global competition is expanding putting pressure on the industry.

The international scene remains dominated by currency movements and destabilizing geopolitical tensions. With the Russian embargo, our industry is not only a victim of a trade shortfall but has yet to halt the domino effect on the price of the product categories concerned. The globalisation of world trade is increasingly in doubt.

Attention is also drawn to the falling level of consumption in many countries. The issue of the competitiveness of turkey meat is becoming a matter of permanent concern. For 2015, we expect a slight increase of consumption despite strong competition from other meats such as pork and chicken. It may be emphasized that all the volumes imported in Europe are under Community tariff rate quota, mainly from Brazil.

Welfare of Turkey

a.v.e.c. agrees that good farming practice and farm management are vital for turkey health and welfare. Turkeys are, like other animals, sentient beings and must be treated with respect.

The welfare of animals is important to society. Turkeys like other animals reared for meat production are kept in houses where the biological needs of the turkeys are taken care of: appropriate nutrition, freedom of movement, physical comfort and the need to perform natural behaviour. The turkeys are protected against adverse climatic conditions, injury, fear and disease. Developments in feed, housing, equipment, medicines and genetic research are taken into account to improve the conditions during rearing.

The issue of animal welfare during transport represents one of the European Poultry Industry concerns. The poultry sector has high standards of animal welfare. Nevertheless, we are constantly working on further improvements

Histomonosis

This disease causes a permanent and serious threat for the health condition and welfare of animals in the EU. As no effective veterinary medicine is currently authorized for use and there is no commercially available vaccine, the sector continues to emphasize in meetings with authorities that because of the economic losses and animal suffering, the disease should attract all the attention of risk managers. In addition, public health problems associated with the use of veterinary medicines should also be addressed.

Vigilance against avian influenza

Again, we are faced with a threat of an avian influenza epizootic outbreak with in addition the need to counter media sensationalizing of the issue. The protection and surveillance measures have proved to be effective in containing the spread of the virus. While the risk to the health of consumers is almost zero, the economic consequences can be of great importance for the poultry industry.

TRADE NEGOTIATIONS

PRESENTATION OF THE A.V.E.C. WORKING GROUP ON TRADE BY THE CHAIR, STIG MUNCK LARSEN

The Working Group on Trade defends the position of the EU poultry sector

The Working Group on Trade held its first meeting on 10th December 2013 and held up till June 2015 seven meetings. It is formed by expert representatives from so far eight member countries of **a.v.e.c.** The participants appointed representing the poultry business and poultry associations are Chair Stig Munck Larsen (DK), Anne Burgers (NL), Philip Eeckman (BE), Giorgy Endrödi (HU), Anika Folgart and Katharina Wolfhard (DE), Andrew Large (GB), Gilles Le Pottier (FR), Paul Lopez, (FR and **a.v.e.c.** President) and Alberto Redondo Cardeña (ES).

The objective of the Working Group is to support the board and the secretariat and work in close cooperation on trade related issues to develop final position papers for presentation to the **a.v.e.c.** board. In this way trade experts can ensure that enhanced prior technical discussions can efficiently pave the way for policy decisions on an informed basis taken by the **a.v.e.c.** Board.

The Working Group on Trade covers all trade related issues relevant for the poultry sector including SPS issues, trade negotiations, trade disputes, international standards and internal market issues and regulatory framework like export promotion, marketing standards and labelling.

The meetings in the Working Group are normally organized back to back with any major trade policy event that gives the opportunity to arrange policy meetings with relevant stakeholders in the European Commission and the European Parliament. In this respect meetings are regularly being held with key persons in the Commission services to exchange views and to provide the Commission with the key priorities and interests of the European poultry sector in general and in specific trade negotiations.

The main focus of the Working Group on Trade is currently on the EU-US free trade negotiation – also named TTIP (Trans-Atlantic Trade and Investment Partnership). a.v.e.c supports a TTIP agreement which respects the European “farm to fork” approach and the regulatory differences that apply in the value chain in the two continents. In this respect the major challenge the Working Group discusses is the so-called SPS measure (phytosanitary) which covers for example regionalization and the EU as a single entity. Meat decontamination and the use of chemical substances in poultry processing are other key issues for the European poultry sector.

In the context of TTIP the Working Group will commission an independent study of the legislative framework and practices applied on and in the poultry value chain in both the USA and the EU. The objective of enhanced transparency in the poultry sectors is to ensure that policy decisions on TTIP are taken on an informed basis to ensure a viable and healthy European poultry sector.

Furthermore, the Working Group pays great attention to the general framework for market access in third countries and the elimination of trade barriers to exporting poultry to third countries. As a general principle the Working Group is focusing on political guarantees for fair competition and level playing field as an inevitable element in any free trade agreement signed by the European Union.

As regards the internal market policy, the Working Group on Trade seeks to provide significant input to the European policy makers that improves the framework for the poultry sector to promote and marketing its brands and products on the internal market or in third countries.

The Working Group on Trade welcomes the broadest possible representation of **a.v.e.c.** members in order to efficiently find common ground on trade policy issues decided by the **a.v.e.c.** board.

Stig Munck Larsen, Chair of the Working Group on Trade

A.V.E.C.’S POSITIONS ON TRADE NEGOTIATIONS:

Creation of a level playing field between trade partners at core of the EU trade policy:

The main objective of Free-Trade Agreements should be to ensure a fair level playing field between the trade partners of the Agreement. Very often, Free-Trade agreements lead to a situation where the importing countries are put in a better situation than the EU producers allowing them to comply with rules deemed to be equivalent (and not identical rules) that are less strict than EU rules.

At multilateral level, institutions as FAO, OIE and Codex Alimentarius play an important role in international standard setting. It is important that the EU defends its right to impose similar requirements for imported products as are applied on European products especially in the WTO.

Priorities for the SPS team of DG Trade:

The EU Commission should defend and promote the European system based upon the principles “prevention is better than cure” and on the “farm to fork” approach. It is fundamentally different from the system that is focusing only on the quality in the last stage of production. SPS issues must be embedded in the discussion on market access in all FTA negotiations.

The Commission should promote in all FTAs the recognition of the EU as a single and internal market. Regionalization and compartmentalization should also be at the heart of SPS negotiations since many third countries do not follow the OIE recommendations.

In addition, in case of disease outbreaks, more resources should be allocated by the Commission in order to work on the reopening of the markets while the coordination and the exchange of information between Member States and the Commission are critical.

The negotiation of an EU common certificate and the recognition of the EU as one single entity would have the potential to create great market opportunities for EU producers.

Sensitivity of the poultry meat sector:

The study conducted by LEI Wageningen for **a.v.e.c.** on the competitiveness of the EU poultry meat sector[1] shows that duties are needed, even on granted import quotas, to create a fairer level playing field by compensating the higher European legal requirements imposed only on EU producers and higher feed costs in the EU. When poultry meat sector is classified as sensitive in FTA negotiations, the exclusion of the sector from the negotiations may be considered but it should be well balanced with our interests to export poultry.

When concessions are made to third countries through TRQs, the single pocket approach (reduction of bilaterally agreed TRQ volumes in case of multilaterally agreed TRQ volumes) should always be applied while a safeguard clause should be embedded in all agreements.

In negotiating TRQs for a sector, the Commission should not look at the quantities alone, but also the quality and the types of products that are offered in order to avoid an apparent reasonable concession to disrupt completely a market and having an impact on jobs. Today we import 800 000 tons, mostly breast fillets, products with high value and that are preferred by EU consumers. Therefore the total imports represent approximately 25 % of the breast fillets consumed in the EU leading to a big disruption of the market.

Promotion of our export interests

The EU industry is willing to work in close collaboration with the Commission to negotiate market access in third countries when there is an export potential for EU producers and EU industry is competitive. We are convinced that the high quality of European conventional poultry meat may perfectly match the expectations of consumers from third countries. Therefore European promotion funding should not focus solely on so called "quality products" sold at a higher price but also on conventional products.

ON-GOING REGIONAL AND BILATERAL 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.

CANADA

The Canada-EU summit in September 2014 in Ottawa marked the end of the negotiations of the EU-Canada trade agreement (CETA). Poultry was excluded from the negotiations.

However the Investor to State Dispute Settlement (ISDS) mechanism is blocking the final validation of the agreement. Many voices are pressing for modifying or deleting this mechanism from the agreement and there is a risk that the agreement will not be ratified if ISDS clause remains as such.

UNITED STATES

The TTIP negotiations started at the beginning of 2013 with the intention to go beyond the classic approach of Free-Trade agreements just removing tariffs and opening markets. In addition, it aims at aligning rules and technical product standards which currently form the most important barrier to transatlantic trade. 10 rounds of negotiations have passed since the start of the negotiations with the latest one held in Brussels on the week starting on the 13th of July 2015. Most of the different chapters of the agreement have a consolidated text version. The Commission stated that "technically speaking", we are halfway of the process of negotiations. However, on political side, it seems that Americans are more focused on Trans Pacific Partnership[2] negotiations while upcoming elections in US may delay the process.

Poultry meat is considered as a sensitive sector and market access should be negotiated at a later stage of the negotiations.

Consolidated version of the SPS chapter has been discussed in the 10th round of negotiations, but only the EU proposal[3] has yet been made publicly available.

In the European Parliament, a non-binding resolution on TTIP has been voted, calling for the respect of the high EU standards and in particular the food safety standards with the "farm to fork" approach. The resolution also calls for the special treatment of the products identified as sensitive.

The Commission also presented its proposal for the regulatory coherence chapter [4] that aims at reinforcing regulatory cooperation on both sides. A regulatory cooperation body and stakeholders consultation will be implemented in order to achieve better coherence between the EU and US systems and to promote our standards at international level.

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.

MERCOSUR

Negotiations with Mercosur were officially re-launched in May 2010. 9 rounds of negotiations have taken place but the last one occurred in October 2012 and little progress has been made since then. A Mercosur-European Union Ministerial Meeting was held in Brussels, on June 11, 2015 where ministers committed to exchange market access offers within the last quarter of 2015. Talks should focus on tariffs, protected food names, phytosanitary rules and on the overall ambition of the agreement. Brazil, which is pushing hard for a deal, especially in farm exports, handed Mercosur's Presidency to Paraguay on July 17 2015. The Commission has not communicated the content of its offer for the agricultural part but committed to take into account the cumulative effect of other bilateral agreements and the effect of a WTO agreement, for the meat sector in particular.

MEXICO

The European Union (EU) and Mexico agreed in June to relaunch negotiations in order to modernize a 15-year-old free trade agreement. This has been decided in the context of the negotiations of the EU with Canada and the US, the 2 main partners of Mexico.

CHINA

The Commission is currently negotiating an investment agreement with China. The negotiations have been launched at the end of last year but the scope of this agreement is not as broad as a Free-Trade agreement. The negotiations concern mainly how to better protect the investments made by EU industries in China and vice-versa. The signature of such an agreement may be seen as a positive sign in the perspective of starting negotiations with China on a full free-trade agreement in the future. On 8 April 2015, China requested consultations in WTO with the European Union regarding measures to modify the European Union tariff concessions on certain poultry meat products.

China claims that the measures are inconsistent with Articles I, II, XIII and XXVIII of the GATT 1994. On 8 June 2015, China requested the establishment of a panel. At its meeting on 19 June 2015, the DSB deferred the establishment of a panel.

INDIA

After a long period of inactivity, the negotiations are set to restart in August 2015. Director General of DG Trade, Mr. Demarty indicated that the talks will begin after the new Indian commerce secretary-designate, takes over from her predecessor. The secretariat will promote the offensive interests of the sector in these negotiations while remaining attentive to India's demands.

JAPAN

The Council gave the Commission the green light to start trade negotiations with Japan in November 2012. Willingness to conclude an agreement from both parties was expressed during an EU-Japan Summit meeting held in Tokyo on 29 May 2015 while the Japanese Prime Minister Abe has expressed several times the objective of concluding the negotiations by end 2015. The 11th round of the EU-Japan FTA negotiations will take place in early summer 2015 in Brussels. The outcome of these negotiations with Japan might be very much influenced by the negotiations of the Trans-Pacific Partnership with the US. **a.v.e.c.** has expressed its interests in taking an export oriented approach in these negotiations.

PHILIPPINES

The EU has started a scoping exercise with Philippines which is the preliminary phase before the launch of FTA negotiations. The Commission could be ready soon to start negotiations but they may wait to conclude results with Vietnam and Singapore before launching new FTA negotiations.

MALAYSIA

The negotiations were launched in Brussels 5 years ago and 7 rounds of negotiations have passed. However negotiations are on hold and the Commission has not met its Malaysian counterparts for 2 years. Negotiations may restart if political willingness from Malaysian authorities is expressed in the coming months.

THAILAND

Four rounds have taken place so far but the last meeting took place on 8-10 April 2014 in Brussels. The negotiations have been halted due to the political situation in the country. Elections will be organized in autumn in Thailand and it is unlikely that negotiations restart before then.

VIETNAM

The EU and Vietnam agreed in principle on a Free-Trade and Investment Agreement on the 4th of August 2014. Poultry meat trade will be fully liberalised after 10 years while frozen pork meat will be duty free after 7 years, beef after 3 years, dairy products after amaximum of 5 years and food preparations after a maximum of 7 years. Vietnam has accepted to recognize the EU as a single entity and the priciple of regionalisation while strict rules of origin have been secured by EU negotiators. The adoption/ratification of the agreement is scheduled by the end of 2017/beginning 2018.

ALREADY AGREED TRADE NEGOTIATIONS

ANDEAN COUNTRIES (COLOMBIA, PERU - ECUADOR)

The EU and its Andean partners – Colombia and Peru – finalized the negotiations in 2010. Following the ratification procedure, 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 7500 tons for poultry from Peru into the EU with and annual increase with 750 tons has been agreed.

In July 2014 the negotiations were concluded with Ecuador in view of its accession to the Agreement. The next steps before Ecuador's accession are the translation of the negotiated texts and agreement on the Protocol of Accession together with Colombia and Peru. Contacts are maintained to explore a possibility to integrate Bolivia.

GEORGIA AND MOLDAVIA

The agreements with the 2 countries were signed on the 27th of June in Brussels 2014. The Free Trade Area applies provisionally since the 1st of September 2014. This FTA is not simply market access since it will lead to a regulatory convergence with the EU legislation to improve the competitiveness of these countries.

SINGAPORE

The agreement was signed in December 2012. Singapore already autonomously applies zero duties on the vast majority of imports among them agricultural products and particularly poultry meat. 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 needs now to be formally approved by the European Commission and then agreed upon by the Council of Ministers, and ratified by the European Parliament.

UKRAINE

The Deep and Comprehensive Free Trade Area (DCFTA) with Ukraine was signed on June 2014. For poultry meat, Ukraine benefits from duty free Tariff Rate Quotas 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.
The Commission has delayed until 31 December 2015 the provisional application of the DCFTA while continuing autonomous trade measures of the EU to the benefit of Ukraine during this period. In concrete terms, the 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 will not be available before the 1st of January 2016.
a.v.e.c. deplored this delay and has warned the Commission to be particularly watchful of Ukrainian imports in order to make sure that the high level of protection offered by EU legislation in terms of animal welfare, animal health, food safety and quality will be respected. The European Investment Bank has granted a loan worth €85 million to the biggest poultry meat company in Ukraine for the development of its poultry meat activities creating "the largest poultry farm in Europe". It is worrying a.v.e.c. that by this action the European Union is creating a competitor against its own producers in a neighboring country while not being able and or willing to impose and enforce compliance with all European standards on products from this country.

ANTI-DUMPING DUTIES FROM SOUTH AFRICA:

On the 27th of February 2015, the International Trade Administration Commission (ITAC) has released the final duties that will be applied on frozen meat of fowls of the species Gallus Domesticus, cut in pieces with bone in, from UK, Germany and the Netherlands. The rate of the antidumping duty is 73,33% for Germany, 22,81% for the Netherlands and 30,99% for United Kingdom. A number of companies have cooperated with ITAC and got a lower rate of antidumping duty varying from 0 – 31,3%. The details of the decision of ITAC are shown on page 3 in the table by the following link:
http://www.sars.gov.za/AllDocs/LegalDoclib/SCEA1964/LAPD-LPrim-Tariff-2012-15%20-%20Schedule%20No%202.pdf
Companies from these countries that did not export to South Africa in 2012, can request the newcomer / new shipper procedure to avoid anti-dumping duties. Besides the condition that exporters should not have exported the product to SACU in 2012, the new exporter should show that it is (and was) not related to any of the exporters or producers in the exporting country that were subject to the anti-dumping duties.
For the companies that exported in 2012 and that disagree with the final decision, 2 possibilities are available to challenge the final decision:

- proceed with a court case against the final duties in South Africa
- convince their government and the EU to initiate a WTO case against South Africa

References and sources:

- http://www.ictsd.org/
- http://ec.europa.eu/trade/
- http://trade.ec.europa.eu/doclib/docs/2006/december/tradoc_118238.05.05.pdf

[1] http://www.avec-poultry.eu/system/files/archive/new-structure/Communications/Study%20on%20competitiveness%20of%20poultry%20meat%20sector%20updated%20with%202013%20data.pdf
[2] Brunei, Chile, Singapore, and New Zealand signed the agreement in 2006 while since 2008, additional countries joined negotiations for a broader agreement: Australia, Canada, Japan, Malaysia, Mexico, Peru, the United States, and Vietnam, bringing the total number of participating countries to twelve.
[3] http://trade.ec.europa.eu/doclib/docs/2015/january/tradoc_153026.pdf
[4] http://trade.ec.europa.eu/doclib/docs/2015/april/tradoc_153403.pdf

PERSPECTIVES ON POULTRY WORLD MARKETS (2015-2024)

Global agriculture projections for 2015-2024

After a period of high prices in crop production, 2 years of strong harvests in key producing regions have lowered the upward pressure on prices. On the contrary, prices for the meat production on farm remained high due to disease outbreaks and herd rebuilding.

Over the 10 next years, prices are expected to decline despite stronger demand, due to productivity gains and lower input prices, while remaining at a higher level than the period preceding the price spike from 2007 to 2008. The major rise in demand for food will be located in developing countries. As a consequence of the diversification of the diets in these countries, prices for meat and dairy products will be higher than those for crops. In Europe, North America and Asia, increased production will be achieved through productivity growth and yield improvement while South America will also bring into production new agricultural land. Low production growth is expected in Africa although investments could give significant results on yields and production growth. A few countries are likely to supply most of the exports, increasing the dependency of their trade partners and the risk for these countries in case of natural disasters, economic dislocation or trade measures.

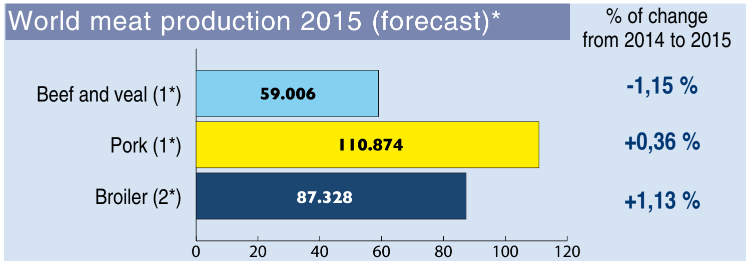
Global meat sector perspectives

Meat prices reached record levels in 2014, mainly thanks to high beef and poultry prices. Shortages in pig meat supply due to outbreaks of the porcine epidemic diarrhea virus (PED) in US and African Swine Fever in the EU contributed to higher pork prices as well. Several years of reduction in the herds for beef and sheep meats in major producing countries have also generated higher prices while demand for poultry meat has kept growing worldwide. Prices in real terms are expected to remain strong in the next decade but at lower level than the year 2014. A rise in total meat production is predicted in the coming decade, in particular for the pork and poultry meat sectors, although weaker global economic growth may reduce consumption potential. Production will increase by 17 % within the next decade, mostly in developing countries. Consumption per capita is predicted to increase by 1,6 kg retail weight equivalent (r.w.e.) from now to 2024, reaching 35,5 kg r.w.e., mainly in developing regions.

Global Poultry production projections

For several years, meat production has been hampered by volatile feed costs that reduced producer's margins. Relative stability in feed prices combined with short production cycles allows poultry meat to improve in profitability and respond rapidly to demand changes. In addition, poultry meat combines several comparative advantages over other meats such as the affordability, absence of any religious restrictions, limited GHG emissions, high nutritional value,…

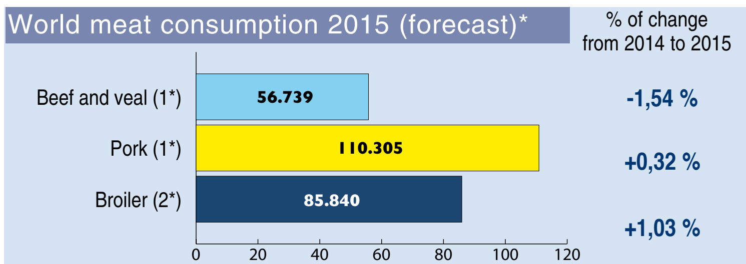
As a result, production is expected to grow especially in regions where feed is available and used intensively. Half of the increase in total meat production within the next decade will be captured by poultry meat and will be located mostly in developing countries, with an additional 26 million tons of poultry meat produced globally between now and 2024. Better feed conversion ratios together with improved meat-to-feed price margins will also contribute to production growth. Prices are expected to increase consistently to reach 1550 USD/T carcass weight equivalent (c.w.e.) and will be higher than the previous decade. The key downside risk to these predictions is the prevalence of diseases and especially the evolution of Avian Influenza outbreaks.



Source: USDA-FAS attache reports, official statistics, and results of office research, FAPRI

Poultry consumption projections

Out of the 4 main types of meat, poultry meat will continue to be the meat with the fastest growing consumption mainly thanks to its affordability and healthy image. Poultry meat consumption is predicted to grow at a 2 % annual rate (1,6 % for all types of meat including poultry meat) over the period considered. While pork and beef meat consumption will remain stable over the next decade, poultry will capture most of the increase in demand for meat. In 2024, poultry meat will have become the world's preferred meat for consumers. In developed countries, consumption will increase but at a slower rate than developing countries, where the higher demand will be located. In these countries, rapid population growth, urbanisation and development of urban lifestyles contribute to higher protein intake and lead to higher demand of poultry meat. Consumption of poultry meat will reach 22,8 kg per capita in 2024 in Europe, representing 32 % of the total meat market share in the EU.



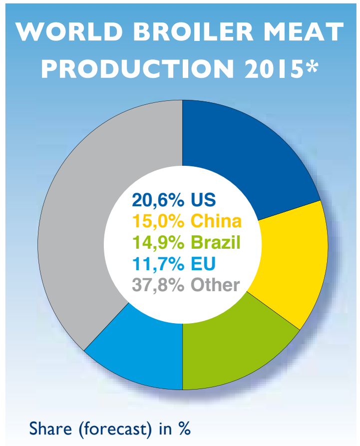
Source: USDA-FAS attache reports, official statistics, and results of office research, FAPRI

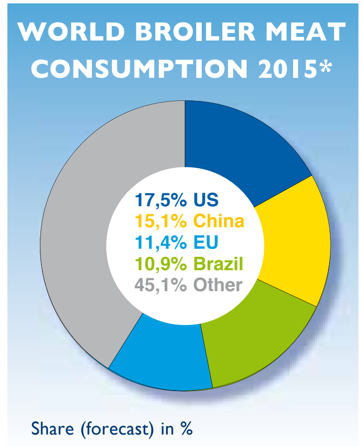
1* 1.000metric tonnes (carcass weight equivalent)
2* 2.000 metric tones (ready to cook equivalent)
*2015 Apr. estimates

Poultry projection in trade

The volume of global poultry meat trade is expected to remain robust reaching 16,2 million tons in 2024, although the rate of increase will slow down compared to the previous decade (2,9 % predicted for the next decade compared to the 6,4 % experienced over the last 10 years). Main importing countries will be located in Middle East, Asia and Africa (South Africa, Benin, Ghana).

Although developed countries will account for more than 50 % of global meat exports, their share is predicted to decline steadily over the considered period. In total, EU poultry meat exports are predicted to grow by 50 000 tons each year over the next ten years. Growth in trade of meat products will slow down over the next period, with 11 % of the meat produced globally being traded. 50 % of the imports will originate from developing countries, mainly located in Asia and Africa. Brazil will keep its dominant position contributing to a quarter of the export increase and accounting for 21 % of the meat exported globally. Diseases and trade agreements may have a dramatic impact on trade flows in the future. In particular, the trade bans resulting from the Avian Influenza outbreak in the US may have a great influence on trade flows in the short term but it is questionable if this might lead to a reshuffle of the positions of the different actors on the export markets in the longer run.



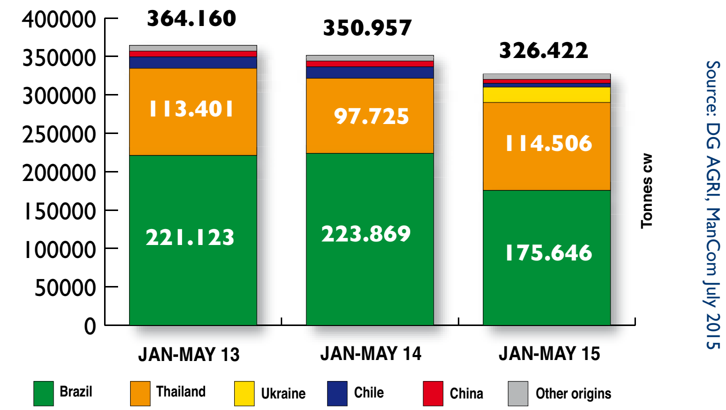


* 2015 April estimates

Main issues and uncertainties for EU poultry meat trade

- Trade policies remain one of the main factors influencing the outlook and dynamics in the world meat markets. Several bilateral agreements between some of the biggest meat producing and trading countries are currently being negotiated and their implementation could considerably modify trade flows. TTIP, TPP or the recently concluded China-Australia Free Trade Agreement can be seen as examples of partnerships between major countries/blocks active in terms of meat production/consumption/trade that could dramatically impact the global meat market.
- The implementation of domestic policies can be seen as another risk factor. For example, the one-year ban imposed by Russian Federation in 2014 and prolonged for another year on foods supplied from the United States, Australia, Norway, Canada and the European Union in response to economic sanctions and political situation in Ukraine. The predictions are assuming that the ban will not be prolonged in the future.
- The sanitary and food safety issues linked in particular to animal disease outbreaks may play a critical role in the uncertainty of the predictions. The Porcine Epidemic Diarrhoea virus (PEDv) in the United States, disrupted the pork market in US causing an increase in pork prices in the Pacific region. Other examples relate to BSE in Canada and Avian Influenza in the United States and to a lesser extent in some EU countries, resulting in some temporary trade restrictions and impossibility for these countries to export. The effects on the markets with these outbreaks are highly dependant on factors such as their duration, intensity, potential consumer reactions and trade restrictions.
- Legislation on environment, animal health or animal welfare may have an impact on the development of the livestock sector. New requirements in terms of animal housing, waste disposal, etc may induce higher costs of compliance for the producers, and decrease the production capacities. In addition, the livestock sector is perceived as a key contributor to GHG emmissions. As demand for livestock products is predicted to increase due to growing population and changing lifestyles in developing countries, these emissions may rise and may contribute to consumer rejection of meat products, especially in developed countries. There is also a risk that in the medium to long term, livestock production may be subject to carbon mitigation constraints in some parts of the world.
- Feed represents 50 % of the cost for poultry meat producers. Feed prices are dramatically influenced by macroeconomic values and therefore, the evolution of oil prices and exchange rates may play a crucial role in the evolution of the poultry prices and margins.

IMPORTS of poultry meat into EU (Tonnes cwe)



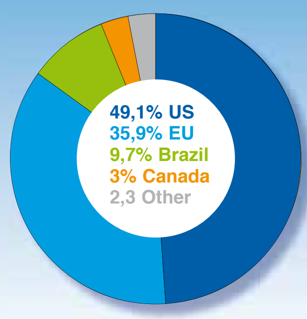
Source: DG AGRI, ManCom July 2015

86 % of the world total. Since 2000, the global growth in turkey production amounts at 0.7 % annually and is lower than the annual average increase of the population which amounts 1.2 %. Global consumption of turkey meat is estimated at 0.77kg per capita but it is not representative as around 3/4 of the world's population does not have access to turkey meat. American consumption of turkey is the highest in the world with 7,3 kg per capita as the industry has developed it from a seasonal product to a year-round range of diversified and value-added products. Consumption in the EU amounts 3.8-3.9kg/capita and since the EU is a mature market it is unlikely that the consumption level will overtake 4kg/capita.

Trends for global turkey production and consumption

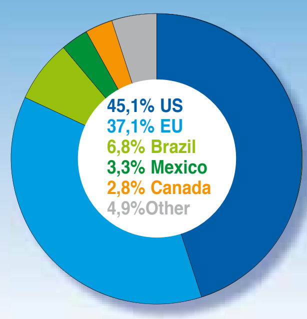
Expectations of a possible recovery of the sector in the 2014 estimates have been hampered by outbreaks of highly pathogenic avian influenza (HPAI) currently hitting turkey flocks in the USA, which accounts for almost half of the total world production. The bulk of production comes from 7 countries as the USA, Germany, Brazil, France, Italy the UK andCanada that produce

WORLD TURKEY MEAT PRODUCTION 2014*



Share (forecast) in %

WORLD TURKEY MEAT CONSUMPTION 2014*



Share (forecast) in %

* 2014 Apr. estimates

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

Trade in fresh/frozen turkey meat has been increasing over the last decade from 903,000 tonnes in 2000 to over a million tonnes in 2012. USA, Brazil and the EU dominate export sales representing more than 90 % of the business. The USA is the leading exporter of turkey meat with 364,000 tonnes exported in 2014, but USDA forecasts a decrease for 2015 to 328,000 tons. However, long-term projections envisage further expansion of the exports to reach 400,000 tons by 2023. Brazil's exports are expected to increase as a result of currency's depreciation after a fall to 126,000 tons in total exports in 2014. Mexico remains the world's biggest importer of turkey meat with imports amounting around 150,000 tons a year. China and Saudi Arabia are both importing more than 40 000 tons a year mainly from the US and Brazil. Finally, African countries steadily increased their turkey meat imports from 61,000 tons in 2000 to 142,000 tons in 2012.

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**

* 2014 Apr. estimates

References:
http://www.ers.usda.gov/media/1855849/ldpm252.pdf
http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2014/fullrep_en.pdf
http://www.agri-outlook.org/publication/
http://usda.mannlib.cornell.edu/usda/fas/livestock-poultry-ma//2010s/2014/livestock-poultry-ma-04-18-2014.pdf
http://www.thepoultrysite.com/articles/3479/global-poultry-trends-turkey-trade-tops-million-tonnes/
http://www.thepoultrysite.com/articles/3477/global-poultry-trends-costs-disease-and-lower-demand-hit-turkey-growth/
http://www.thepoultrysite.com/articles/3480/global-poultry-trends-individuals-eat-less-turkey/

STATISTICS

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

	2009	2010	2011	2012	2013	2014
Gross indigenous production	12.543	12.953	13.215	13.484	13.731	14.091
Export meat	928	1.149	1.204	1.234	1.223	1.265
Import of meat	848	782	796	795	750	753
Consumption	12.454	12.578	12.797	13.034	13.245	13.566
Consumption per capita, kg	25,1	25,3	25,7	26,1	26,3	26,8
Self-sufficiency %	100,7	103,0	103,3	103,4	103,7	103,9

Notes: Partial provisional or estimated.

Source: EU-Commission, so the gross indigenous production is different to table No. 2.

PRODUCTION UPDATED 2015

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

	2009	2010	2011	2012	2013	2014
Austria (15)*	121	125	128	125	121	123
Belgium / Luxembourg (11)	259	250	239	250	250	250
Bulgaria (18)	117	115	110	100	97	100
Croatia (23)	39	30	36	36	33	35
Cyprus (24)	27	27	27	25	24	24
Czech Republic (13)	212	212	212	172	170	169
Denmark (12)	180	180	180	180	168	173
Estonia (25)	14	14	15	15	17	18
Finland (17)	95	96	101	108	111	113
France (2)	1.719	1.749	1.864	1.849	1.872	1.835
Germany (3)	1.460	1.623	1.681	1.695	1.714	1.785
Greece (16)	117	118	114	118	119	117
Hungary (8)	445	430	466	488	515	543
Ireland (14)	114	123	118	124	129	129
Italy (6)	1.197	1.221	1.232	1.261	1.259	1.261
Latvia (24)	21	22	23	24	26	27
Lithuania (19)	70	76	75	80	87	89
Malta (26)	5	4	4	4	4	4
Netherlands (7)	726	739	806	838	848	866
Poland (1)	1.782	1.963	2.038	2.260	2.372	2.560
Portugal (10)	330	337	331	324	324	327
Romania (9)	389	372	365	335	360	382
Slovakia (21)	97	90	74	75	76	77
Slovenia (22)	47	46	48	50	48	50
Spain (5)	1.280	1.281	1.278	1.251	1.299	1.390
Sweden (20)	86	86	86	86	86	86
United Kingdom (4)	1.457	1.568	1.558	1.607	1.606	1.590
EU-28	**11.952**	**12.896**	**13.209**	**13.480**	**13.737**	**14.123**

*ranking of the country for the variable considered for the year 2014

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)

	2009	2010	2011	2012	2013	2014
Argentina	1.545	1.643	1.694	1.710	1.825	.
Brazil *)	11.487	12.797	13.352	13.155	12.828	13.227
Chile	609	596	652	662	674	.
China	16.582	17.215	17.776	18.672	18.913	19.150
India	2.121	2.226	2.268	2.309	2.358	.
Japan	1.412	1.416	1.377	1.443	1.449	.
Mexico	2.672	2.715	2.798	2.826	2.838	.
Russia	2.305	2.549	2.875	3.285	3.448	3.700
Saudi-Arabia	567	578	577	573	582	.
Switzerland	65	69	73	76	80	85
South Africa	1.394	1.480	1.493	1.496	1.504	.
Turkey	1.333	1.462	1.627	1.737	1.772	.
Ukraine	766	860	880	920	1.020	.
USA	18.971	19.608	19.796	19.944	20.235	20.450
World production	**95.105**	**99.345**	**102.847**	**106.014**	**109.020**	**110.550**

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

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

	2009	2010	2011	2012	2013	2014
Poultry meat [1]						
Austria (8)*	85	98	92	104	99	102
Belgium / Luxembourg (5)	157	162	189	222	228	238
Bulgaria (9)	68	81	102	109	88	98
Cyprus (24)	6	7	7	8	10	9
Czech Republic (10)	77	79	92	101	92	97
Denmark (13)	48	58	67	76	91	66
Estonia (22)	18	21	20	18	19	18
Finland (25)	5	5	5	5	5	7
France (3)	310	356	372	383	376	391
Germany (1)	460	491	500	514	531	566
Greece (12)	66	54	61	74	76	78
Hungary (16)	45	38	47	45	50	49
Ireland (11)	53	55	60	65	69	79
Italy (14)	37	46	54	60	63	66
Latvia (21)	26	28	28	29	28	28
Lithuania (20)	25	20	24	31	32	33
Malta (26)	5	5	5	4	5	5
Netherlands (2)	396	437	470	450	422	413
Poland (19)	39	33	33	44	40	37
Portugal (15)	39	45	48	46	54	59
Romania (6)	131	94	91	111	96	119
Slovakia (18)	38	47	46	32	55	40
Slovenia (23)	11	12	13	14	15	15
Spain (7)	119	126	124	122	126	114
Sweden (17)	38	40	38	43	45	48
United Kingdom (4)	339	380	411	393	394	387
EU-27/EU-28	**199**	**167**	**184**	**184**	**149**	**149**
Salted meat 2)						
Germany	52	36	38	37	38	47
Netherlands	137	132	140	154	160	172
United Kingdom	33	36	47	44	50	55
EU from third countries	**213**	**196**	**207**	**212**	**227**	**256**
Preparations of poultry 3)						
EU from third countries	**433**	**432**	**499**	**497**	**448**	**376**

* ranking of the country for the variable considered for the year 2014

Note: 1) Without preparations, livers, salted meat and live poultry. - 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 poultry meat by EU-countries ('000 tons[1])

	2009	2010	2011	2012	2013	2014
Austria (10)*	49	51	52	58	56	60
Belgium / Luxembourg (5)	377	410	436	488	473	473
Bulgaria (15)	29	46	47	47	36	42
Cyprus (24)	2	2	2	2	1	1
Czech Republic (17)	23	26	25	31	30	30
Denmark (9)	92	106	87	82	77	77
Estonia (23)	4	6	9	6	7	6
Finland (21)	13	13	15	17	18	16
France (4)	479	505	548	526	519	476
Germany (3)	402	446	467	501	510	531
Greece (18)	13	15	22	23	22	26
Hungary (6)	130	150	172	189	195	203
Ireland (13)	39	62	78	63	52	56
Italy (8)	116	150	151	149	147	149
Latvia (22)	4	7	8	9	14	14
Lithuania (14)	18	24	31	39	43	46
Malta (25)	0	0	0	0	0	0
Netherlands (1)	875	1.076	1.217	1.061	1.073	1.129
Poland (2)	316	412	442	528	587	709
Portugal (19)	9	10	17	18	19	20
Romania (12)	33	59	75	79	70	59
Slovakia (16)	14	30	28	34	36	34
Slovenia (20)	14	17	18	18	19	20
Spain (7)	90	128	147	129	136	177
Sweden (11)	30	44	44	51	52	60
United Kingdom (6)	258	270	195	296	350	348
EU-27/EU-28 2)	**886**	**1.125**	**1.266**	**1.275**	**1.269**	**1.331**
which were						
chicken	752	960	1.084	1.091	1.096	1.162
turkey	103	130	143	146	136	138
ducks, geese, guinea fowls	31	35	40	37	37	31
preparations of poultry 3)						
EU to third countries	**45**	**45**	**49**	**50**	**42**	**40**

* ranking of the country for the variable considered for the year 2014

Note: 1) Without preparations, livers, salted meat and live poultry. EU Member States figures cover inside and outside EU
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 of poultry and chicken meat (‘000 tons) by third country

	2009	2010	2011	2012	2013	2014
Total imports of poultrymeat						
Switzerland	44	44	46	46	45	47
Imports of broiler meat						
Angola	161	239	287	301	321	325
China	401	286	238	254	260	.
Hong Kong 1)	253	295	410	370	272	255
Irak	397	522	598	612	673	720
Japan	645	789	895	877	854	880
Russia	929	656	463	560	540	385
Saudi Arabia	605	681	788	799	839	770
United Arab. Emirates	297	289	314	.	.	.
Exports of broiler meat						
Argentina	178	214	224	291	324	340
Belarus	.	38	74	105	105	117
Brazil	3.222	3.272	3.443	3.508	3.482	3.600
Chile	87	79	90	93	88	83
China	291	379	423	411	420	440
Thailand	379	432	467	538	513	540
Turkey	.	104	198	278	327	360
Ukraine	.	23	43	74	141	170
USA	3.093	3.067	3.165	3.300	3.332	3.297

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

Consumption of poultry meat in EU and third countries (kg/head)

	2009	2010	2011	2012	2013	2014
Austria (13)*	20,1	20,5	20,8	21,1	20,6	20,5
Belgium / Luxembourg	18,0	17,0	16,8	.	.	.
Bulgaria	22,0	.	.	.	.	.
Cyprus	.	.	.	.	.	.
Czech Republic (10)	23,9	23,5	24,0	23,0	22,5	22,5
Denmark (8)	24,4	23,8	24,1	.	.	24,0
Estonia	21,0	.	.	.	.	.
Finland (17)	16,6	16,7	16,9	17,4	17,6	18,1
France (7)	24,4	24,7	25,2	25,7	26,0	26,4
Germany (15)	19,2	19,1	19,4	19,0	19,4	19,5
Greece (12)	21,0	20,7	20,5	20,7	21,0	20,8
Hungary (3)	29,0	28,8	29,0	29,5	30,0	30,5
Ireland (4)	31,0	30,5	29,5	30,0	30,3	30,4
Italy (16)	18,2	18,5	18,7	19,0	19,0	18,8
Latvia (15)	20,0	19,5	19,7	20,0	19,5	19,5
Lithuania (9)	23,0	22,2	22,5	22,7	23,0	22,8
Malta	.	.	.	.	.	.
Netherlands (11)	23,1	22,8	22,3	22,3	22,5	22,4
Poland (5)	25,6	26,3	27,4	27,6	28,8	29,8
Portugal (1)	34,0	34,1	39,8	39,7	39,8	39,0
Romania	19,0	.	.	.	.	.
Slovakia (14)	20,0	20,1	20,0	19,8	20,0	19,8
Slovenia	.	.	.	.	.	
Spain (2)	30,5	30,2	30,5	30,0	30,5	31,0
Sweden (18)	12,8	12,0	11,8	11,6	11,7	11,3
United Kingdom (6)	26,4	28,6	28,5	28,7	28,7	28,5
EU	25,1	25,3	25,7	26,1	26,3	26,8
Switzerland	16,8	17,2	17,8	17,7	17,9	18,6

* ranking of the country for the variable considered for the year 2014
Note: Partial provisional or estimated. For EU countries.
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.

Self-sufficiency in poultry meat (%)

	2009	2010	2011	2012	2013	2014
Austria (15)*	72	73	73	70	70	70
Belgium / Luxembourg	180	185	190	.	.	.
Bulgaria	78	.	.	.	.	.
Czech Republic (13)	80	80	78	74	76	76
Denmark	141	146	135	.	.	.
Estonia	52	.	.	.	.	.
Finland (6)	104	104	105	107	107	106
France (7)	115	114	114	110	107	105
Germany (4)	95	106	108	111	109	113
Greece (12)	74	80	80	79	78	79
Hungary (3)	134	135	136	138	137	145
Ireland (9)	100	102	104	100	100	99
Italy (5)	108	110	110	108	107	107
Latvia (16)	52	52	52	53	55	58
Lithuania (10)	85	90	93	95	98	97
Netherlands (1)	190	196	217	224	226	230
Poland (2)	128	136	139	139	140	145
Portugal	92	92	93	93	91	.
Romania	79	.	.	.	.	.
Slovakia (14)	69	71	70	78	72	75
Spain (6)	97	99	101	100	100	102
Sweden (8)	86	92	95	97	96	100
United Kingdom (11)	90	88	87	89	92	93
EU 27/EU-28	**101**	**103**	**103**	**103**	**104**	**104**

* ranking of the country for the variable considered for the year 2014

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 EU and third countries (gross domestic production – '000 tons carcass weight)

	2009	2010	2011	2012	2013	2014
Austria (17)*	90	90	91	89	89	90
Belgium / Luxembourg (8)	264	288	362	362	362	362
Bulgaria (20)	79	77	81	74	72	74
Croatia (25)	30	23	29	29		26
Cyprus (23)	27	28	27	25	25	23
Czech Republic (13)	181	181	181	158	161	160
Denmark (12)	175	175	175	175	168	168
Estonia (24)	14	14	15	15	14	17
Finland (16)	86	88	93	99	104	106
France (4)	1008	1041	1096	1091	1146	1.112
Germany (3)	911	1.073	1.150	1.160	1.190	1.255
Greece (14)	160	160	160	160	160	160
Hungary (9)	145	240	254	280	305	329
Ireland (15)	98	109	110	116	117	118
Italy (6)	742	780	796	861	863	873
Latvia (23)	23	23	23	24	25	26
Lithuania (19)	69	76	75	79	79	87
Malta (25)	5	4	4	4	5	4
Netherlands (7)	655	664	710	738	750	770
Poland (1)	1.400	1.565	1.645	1.835	1.450	2.060
Portugal (11)	263	269	265	258	259	262
Romania (10)	389	370	359	325	350	310
Slovakia (21)	84	79	66	66	70	69
Slovenia (22)	47	46	47	49	50	47
Spain (5)	1.063	1.085	1.073	1.063	1.041	1.053
Sweden (18)	79	79	80	80	90	90
United Kingdom (2)	1.220	1.323	1.297	1.322	1.391	1.385
EU-27/EU-28	**9.308**	**9.949**	**10.265**	**10.538**	**10.770**	**11.036**
Argentina	1.500	1.680	1.770	2.014	2.060	2.100
Brazil	11.021	12.312	12.863	12.645	12.308	12.692
China	12.100	12.550	13.200	13.700	13.350	13.000
India	2.550	2.650	2.900	3.160	3.450	3.725
Indonesia	1.409	1.465	1.515	1.540	1.550	1.565
Iran	1.997	1.875	1.913	1.956	1.962	.
Mexico	2.781	2.822	2.906	2.958	2.907	3.060
Russia	2.060	2.310	2.575	2.830	3.010	3.200
South-Africa	1.387	1.473	1.486	1.489	1.497	.
Thailand	1.200	1.280	1.350	1.550	1.500	1.565
USA	15.935	16.563	16.694	16.621	16.976	17.254
World	**83.426**	**87.392**	**90.594**	**93.309**	**96.338**	**97.800**

* ranking of the country for the variable considered for the year 2014

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.

Broiler meat consumption in selected EU and third countries (kg/head)

	2009	2010	2011	2012	2013	2014
Austria	12,3	12,6	13,1	13,3	13,3	13,3
France	14,6	14,8	15,2	15,8	16,2	16,9
Germany	10,9	10,9	11,4	11,1	11,7	11,7
Italy	11,4	11,5	11,6	11,7	11,7	11,9
Netherlands	19,0	18,8	18,4	18,4	18,5	.
Portugal	.	.	.	.	.	26,0
United Kingdom	20,6	22,2	21,7	22,0	22,5	22,5
EU-27/EU-28	**18,4**	**19,2**	**19,7**	**20,1**	**20,5**	**21,0**
Third Countries						
Argentina	33,2	36,5	38,2	42,0	41,9	42,2
Brazil	40,3	46,3	47,8	46,0	44,1	45,0
China	8,8	9,0	9,3	9,6	9,3	9,0
India	2,1	2,2	2,4	2,6	2,8	2,9
Iran	21,0	22,3	23,3	.	.	.
Japan	15,5	16,3	16,5	17,4	17,4	17,4
Mexico	28,0	28,5	29,1	29,5	30,1	30,4
South Africa	28,4	29,0	31,8	32,9	32,8	33,1
United Arab Emirates	63,1	59,1	.	.	.	.
USA	41,8	43,1	43,4	42,0	42,8	43,5

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 EU and third countries (‘000 tons carcass weight)

	2009	2010	2011	2012	2013	2014
Austria (10)*	25	24	25	26	22	22
Belgium/Luxembourg (15)	4	5	5	5	5	5
Bulgaria (18)	2	1	1	1	1	1
Croatia (14)	7	6	5	6	6	6
Cyprus (19)	1	1	0	0	0	0
Czech Republic (18)	4	4	4	8	1	1
Denmark (17)	0	0	2	2	2	2
Finland (13)	9	9	8	8	7	7
France (2)	424	409	406	415	386	378
Germany (1)	383	434	398	392	384	390
Greece (16)	3	3	3	3	3	3
Hungary (7)	110	100	101	95	89	93
Ireland (13)	8	8	10	9	8	7
Italy (4)	293	279	276	315	314	310
Malta (19)	0	0	0	0	0	0
Netherlands (9)	27	28	28	28	28	28
Poland (3)	320	345	340	360	350	355
Portugal (8)	38	39	38	39	39	37
Romania (11)	.	2	5	10	10	12
Slovakia (12)	13	11	8	8	8	8
Slovenia (18)	6	6	7	7	7	1
Spain (5)	28	111	104	111	177	181
Sweden (16)	4	4	4	4	4	4
United Kingdom (6)	157	162	171	196	187	173
EU-28	**1.871**	**1.994**	**1.953**	**2.051**	**2.041**	**2.029**
Brazil	466	485	489	510	520	535
Canada	167	159	160	161	165	165
Mexico	11	11	13	14	10	10
Russia	31	70	90	100	100	105
South Africa	53	52	53	53	53	53
USA	2.535	2.527	2.592	2.671	2.623	2.703
World	**5.394**	**5.463**	**5.529**	**5.682**	**5.597**	**.**

* ranking of the country for the variable considered for the year 2014

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.

Consumption of turkey meat in selected EU and third countries (kg/head)

	2009	2010	2011	2012	2013	2014
Austria	6,4	6,3	6,1	6,2	5,9	5,9
France	5,0	5,1	5,1	5,3	5,2	5,1
Germany	6,3	6,2	6,1	6,1	5,8	5,9
Italy	4,9	4,8	4,7	4,8	4,8	4,9
Netherlands	1,1	1,0	1,0	1,0	1,1	.
Portugal	.	.	.	.	5,0	4,9
United Kingdom	4,0	4,0	4,1	4,2	4,2	4,1
EU-27/EU-28	**3,5**	**3,6**	**3,7**	**3,9**	**3,9**	**3,9**
Third Countries						
Brazil	1,6	1,7	1,8	1,7	1,7	1,8
Canada	4,5	4,2	4,3	4,1	4,1	4,1
Mexico	1,3	1,4	1,4	1,4	1,4	1,4
Russia	0,5	0,7	0,8	0,8	0,8	0,8
USA	7,7	7,4	7,3	7,3	7,3	7,2

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.

For further data and information:

MEG- Marktinfo Eier & Geflügel

Tel: +49 (0)228 - 629 47 971

Fax: +49 (0)228 - 962 00 987

http://www.marktinfo-eier-gefluegel.de

meg@ulmer.de

DUCK

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

	2009	2010	2011	2012	2013	2014
Austria (14)	0,1	0,1	0,2	0,1	0,1	0,1
Belgium / Luxembourg (14)	0,1	0,1	0,1	0,1	0,0	0,1
Bulgaria (6)	17,5	18,0	21,0	20,1	21,0	22,0
Cyprus	0,2	0,2	0,2	0,0	0,0	.
Czech Republic (9)	8,2	7,3	4,9	4,2	3,8	5,0
Denmark (11)	4,0	3,8	3,5	3,5	0,1	3,5
Estonia	.	.	.	.	.	.
Finland (15)	0,0	0,0	0,0	0,0	0,0	0,0
France (1)	240,7	238,0	242,6	240,4	233,3	228,0
Germany (3)	67,8	67,3	62,4	63,3	50,8	51,2
Greece (13)	0,2	0,2	0,2	0,2	0,2	0,2
Hungary (2)	55,0	61,0	71,0	69,6	76,5	81,4
Ireland (10)	3,9	4,2	4,0	4,2	4,0	4,5
Italy (7)	15,0	14,0	14,0	14,0	13,0	11,0
Latvia	.	.	.	.	.	.
Lithuania (14)	0,2	0,1	0,3	0,3	0,3	0,1
Malta	.	.	.	.	.	.
Netherlands	17,0	18,0	17,0	17,0	17,0	.
Poland (5)	11,0	14,0	16,0	21,0	17,0	25,0
Portugal (8)	10,0	10,0	9,0	8,5	8,0	8,7
Romania	.	.	.	.	.	.
Slovakia (12)	0,4	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
Spain (9)	0,0	4,8	4,3	6,0	1,0	5,0
Sweden (15)	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom (4)	32,0	31,0	33,0	32,1	30,0	32,1
EU	**488**	**496**	**508**	**509**	**480**	**499**
World	**3.903**	**4.031**	**4.183**	**4.334**	**4.367**	**.**

* ranking of the country for the variable considered for the year 2014

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

POULTRY MEAT MARKET PROJECTIONS FOR THE EU-27, 2015-2024 ('000 t carcass weight equivalent)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Gross indigenous Production	13.101	13.366	13.453	13.542	13.556	13.646	13.726	13.801	13.877	13.957
of which EU-15	9.964	10.152	10.209	10.268	10.254	10.313	10.365	10.413	10.460	10.515
of which EU-N13	3.137	3.215	3.244	3.275	3.302	3.332	3.361	3.388	3.417	3.442
Imports	840	889	946	1.004	1.009	1.008	1.013	1.013	1.017	1.017
Exports	1.310	1.432	1.466	1.499	1.515	1.528	1.541	1.558	1.578	1.587
Net Trade	470	543	519	496	506	520	529	546	561	570
Consumption*	12.631	12.823	12.934	13.047	13.050	13.125	13.198	13.255	13.316	13.387
of which EU-15	10.102	10.296	10.395	10.497	10.488	10.549	10.608	10.654	10.704	10.759
of which EU-N13	2.528	2.527	2.539	2.549	2.562	2.576	2.590	2.601	2.613	2.628
Population (in million)	579,4	580,2	582,6	582,5	585,2	585,9	586,6	586,5	586,6	587,1
of which EU-15	459,2	461,7	464,1	464,5	466,1	466,8	467,3	469,3	469,5	469,8
of which EU-N13	119,2	119,2	119,2	119,1	118,6	118,7	118,3	118,2	118,2	117,8
Per Capita Consumption*	21.8	22.1	22.2	22.4	22.3	22.4	22.5	22.6	22.7	22.8
of which EU-15	22.0	22.3	22.4	22.6	22.5	22.6	22.7	22.7	22.8	22.9
of which EU-N13	21.2	21.2	21.3	21.4	21.6	21.7	21.9	22.0	22.1	22.3

*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 2014-2024, The European Commission, DG AGRI, December 2014 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2014/fullrep_en.pdf)

AGGREGATE MEAT MARKET PROJECTIONS FOR THE EU 2015-2024 (‘000 t carcass weight equivalent)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Gross Indigenous Production	44.326	44.589	44.614	44.614	44.723	44.808	44.886	44.993	45.052	45.095
of which EU-15	36.900	37.023	36.943	36.943	36.988	37.026	37.055	37.098	37.094	37.092
of which EU-N12	7.427	7.566	7.671	7.671	7.735	7.782	7.832	7.896	7.958	8.003
Imports of live animals	0	0	0	0	0	0	0	0	0	0
Exports of live animals	213	185	185	185	185	185	185	195	195	195
Net production	44.114	44.405	44.429	44.429	44.539	44.623	44.702	44.799	44.857	44.900
Imports (meat)	1.354	1.450	1.533	1.533	1.571	1.565	1.565	1.558	1.559	1.556
Exports (meat)	3.561	3.774	3.884	3.884	4.030	4.083	4.160	4.222	4.270	4.291
Net trade	2.207	2.325	2.352	2.352	2.459	2.518	2.595	2.665	2.711	2.736
Consumption*	41.906	42.082	42.079	42.079	42.078	42.104	42.106	42.134	42.147	42.165
of which EU-15	34.500	34.660	34.638	34.638	34.567	34.567	34.548	34.549	34.537	34.528
of which EU-N13	7.406	7.422	7.441	7.441	7.511	7.537	7.558	7.584	7.609	7.637
Population (in million)	579,4	580,2	582,6	582,6	585,2	585,9	586,6	586,5	586,6	587,1
of which EU-15	459,2	461,7	464,1	464,1	466,1	466,8	467,3	469,3	469,5	469,8
of which EU-N13	119,2	119,2	119,2	119,2	118,6	118,7	118,3	118,2	118,2	117,8
Per capita consumption*	65.5	65.7	65.6	65.6	65.3	65.3	65.2	65.2	65.2	65.1
of which EU-15	67.7	67.9	67.7	67.7	67.2	67.0	66.9	66.7	66.6	66.5
of which EU-N13	57.0	57.2	57.5	57.5	58.2	58.5	58.7	59.1	59.4	59.7
of which Beef/Veal	10.7	10.7	10.6	10.6	10.4	10.4	10.4	10.3	10.3	10.3
of which Sheep/goat	1.8	1.8	1.9	1.9	1.8	1.8	1.8	1.8	1.8	1.8
of which Pig meat	31.2	31.1	30.9	30.9	30.8	30.7	30.5	30.4	30.4	30.3
of which Poultry meat	21.8	22.1	22.2	22.2	22.3	22.4	22.5	22.6	22.7	22.8

*retail weight equivalent; coefficients to transform carcass weight into retail weight are 0.7 for beef and veal, 0.78 for pig meat and 0.88 for both poultry meat and sheep and goat meat

Source: Prospects for Agricultural Markets and Income in the EU 2014-2024, The European Commission, DG AGRI, December 2014 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2014/fullrep_en.pdf)

TABLE EU 27 POULTRYMEAT IMPORT – EXPORT TRADE MAIN TARIFF LINES, 2005 – 2010 – 2013 – 2014

IMPORTS

Source: Extraction EUROSTAT, May 2015

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2013	2014	2013	2014
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	4.349.306	1.774.498	1.490.384	1.503.571	208,22	205,91
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65 % chickens'	110.980	114.059	88.548	99.294	157,68	143,31
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.419.962	1.018.232	879.554	879.141	246,17	251,84
02071460	Frozen legs and cuts thereof of fowls of the species gallus domesticus, with bone in	408.140	120.717	88.788	85.394	149,10	131,69
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	25.931	17.634	195,45	173,34
02072710	Frozen boneless cuts of turkeys of the species domesticus	173.417	144.333	144.972	99.656	276,41	292,48
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	32.804	1.956.437	2.272.151	2 559.318	232,28	239,92
1602 (poultry)	**PREPARED/PRESERVED MEAT**	3.067.354	4.287.219	3.968.496	3.768.437	317,39	330,55
160231	**TURKEYS**	944.998	844.275	686.645	457.638	309,28	319,37
16023111	**Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)**	927.902	796.703	667.861	440.516	303,96	311,10
160232	**GALLUS DOMESTICUS**	2.052.387	3.305.460	3.115.058	3.150.259	307,52	321,83
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	111.504	130.266	277,02	259,45
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	2.321.501	2.332.319	341,46	361,36
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	663.356	667.704	193,10	195,74
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	18.696	19.974	334,98	326,50
160239	**OTHER**	69.969	137.471	166.791	160.540	535,47	533,74
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	155.976	155.916	541,28	533,21

EXPORTS Source: Extraction EUROSTAT, May 2015

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2013	2014	2013	2014
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	8.558.970	11.244.041	12.387.729	13.005.810	118,18	110,24
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as ‘70% chickens’,	238.238	236.448	180.028	183.538	129,17	123,67
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	2.926.839	2.565.252	143,78	133,43
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.070.511	1.872.414	2.065.543	2.187.079	71,66	61,59
02071420	Frozen halves or quarters of fowls of the species gallus domesticus	386.980	1.077.792	1.146.059	1.481.936	121,14	114,33
02071430	Frozen whole wings, with or without tips of Gallus domesticus	646.017	946.854	1.271.289	1.467.748	133,64	127,35
02071460	Frozen legs and cuts thereof of fowls of the species gallus	280.842	490.015	727.204	930.445	102,97	99,22
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	864.107	851.608	88,36	91,90
02072710	Frozen boneless cuts of turkeys of the species domesticus	577.512	306.916	234.409	208.665	95,32	108,47
02072730	Frozen whole wings, with or without tips, of turkeys	178.987	217.395	317.632	393.888	158,78	145,06
0207 other		2.100.578	2.701.830	2.654.619	2.735.651	127,74	119,65
1602 (poultry)	**PREPARED/PRESERVED MEAT**	290.379	451.698	422.231	403.299	334,55	343,53
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	208.744	203.900	307,91	311,56
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	79.987	62.348	365,53	367,00
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	101.161	133.500	137.051	357,67	380,42

ADOPTED, FORTHCOMING 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 of 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 and the Council reached a provisional agreement on the regulation at an informal trilogue meeting on 1st June 2015. The regulation is expected to be formally adopted before the end of 2015, it will become applicable five years after its entry into force. COM will start working now on the implementing and delegated acts and the definition of a possible disease list.
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)

Proposal for revision of the medicated feed legislation (Directive 90/167/EEC)

The proposed Regulation will repeal and substitute the existing Directive (90/167/EEC) on the manufacture, placing on the market and use of medicated feed. Its aim is to harmonise the production standards and marketing of medicated feed in the EU at an appropriate safety level, and to reflect technical and scientific progress in this area. The European Parliament and the European Council are discussing the proposal and adoption is scheduled for the end of 2015, or early 2016.

Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on the manufacture, placing on the market and use of medicated feed and repealing Council Directive 90/167/EEC :
http://ec.europa.eu/food/food/animalnutrition/labelling/docs/12328-acte-v_e-greffe_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. Furthermore the revision wants to assess the possibilities to have an improved response to antimicrobial resistance related to the use of veterinary medicines.
Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on veterinary medicinal products
http://ec.europa.eu/health/files/veterinary/vet_2014-09/regulation/reg_part1_en.pdf
Annexes to the Proposal - http://ec.europa.eu/health/files/veterinary/vet_2014-09/annexes/annexes_en.pdf

ANTIMICROBIAL RESISTANCE (AMR) - SANCO/6876/2009

Updated (July 2015) the AMR roadmap and evaluation of the Action Plan against the rising threats from Antimicrobial Resistance (AMR) (COM (2011)748) is available: http://ec.europa.eu/smart-regulation/roadmaps/docs/2015_sante_521_evaluation_antimicrobial_resistance_en.pdf
AMR roadmap (March 2015) http://ec.europa.eu/dgs/health_food-safety/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
See page 18 of Annual Report. The revision of food hygiene law is likely to be adopted soon. Its priorities are to improve food hygiene and therefore increase food safety by introducing simpler and harmonised procedures for meat inspection. These will look at actual food safety 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 in the Member States.

Commission's Regulatory Fitness and Performance Programme (REFIT) - evaluation of Regulation (EC) No 178/2002, the "General Food Law" (GFL)

The Food Chain Evaluation Consortium (FCEC) has been mandated by the DG Health and Food Safety of the European Commission (DG SANTE) to carry out a study on the evaluation of Regulation (EC) No 178/2002, the "General Food Law" (GFL). The preparation of a draft Staff Working Document on the Fitness Check (June – November 2015)will analyse the effectiveness, efficiency, coherence, relevance and EU added value of Regulation (EC) No 178/2002 taking into account the rules and standards developed by subsequent legislation. The finalisation of the draft Staff Working Document is expected on the Fitness Check (December 2015)

The European Union Summary Report on Trends and Sources of Zoonoses, Zoonotic Agents and Food-borne Outbreaks in 2013- http://www.efsa.europa.eu/en/efsajournal/doc/3991.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

GMO's: Review of the decision-making process on in the EU

Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL amending Regulation (EC) No 1829/2003 as regards the possibility for the Member States to restrict or prohibit the use of genetically modified food and feed on their territory.
http://ec.europa.eu/food/plant/docs/plant_gmo_authorisation_proposal_regulation_en.pdf

DIRECTIVE (EU) 2015/412 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2015 amending Directive 2001/18/EC as regards the possibility for the Member States to restrict or prohibit the cultivation of genetically modified organisms (GMOs) in their territory - (Text with EEA relevance)
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:JOL_2015_068_R_0001

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, while the majority of provisions started to apply in December 2014.
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF
The Commission Regulation (EU) No 1337/2013 has been adopted setting out how this Regulation will enter into force. It requires (with some exceptions) the indication of the place of rearing and the place of slaughter for pre-packed fresh, chilled and frozen meat of swine, sheep, goats and poultry. The new rules are applicable as of 1 April 2015.
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:335:0019:0022: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 autumn 2015, the delegated and implementing acts relating to Regulation (EU) No 1144/2014 will enter into force together, while the annual work programme for 2016 establishing the priorities in accordance with Article 8 of Regulation (EU) No 1144/2014 will be adopted.
The new promotion policy will fully enter into force on 1st December 2015.
http://eur-lex.europa.eu/legal-content/en/TXT/?uri=OJ:JOL_2014_317_R_0004

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).
http://ec.europa.eu/agriculture/organic/documents/eu-policy/policy-development/report-and-annexes/proposal_en.pdf
Annexes to the proposal:
http://ec.europa.eu/agriculture/organic/documents/eu-policy/policy-development/report-and-annexes/proposal-annex_en.pdf
In the European Parliament, the report from the MEP Mr. Haussling (Greens) has been published at the beginning of May:
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=en&reference=2014/0100(COD)

BOARD MEMBERS AND DEPUTY BOARD MEMBERS 2014-2015

AUSTRIA	Harald Schliessnig (BM)	Martina Glatzl (DBM)
BELGIUM	Philip Eeckman (BM)	Ann Truyen (DBM)
CZECH REPUBLIC	František Mates (BM)	Monika Bočková (DBM)
DENMARK	Birthe Steenberg (BM)	Stig Munck Larsen(DBM)
FINLAND	Marika Säynevirta (BM)	Veli-Matti Jäppilä (DBM)
FRANCE	Paul Lopez (BM)	Gilles le Pottier (DBM)
GERMANY	Paul-Heinz Wesjohann (BM)	Thomas Janning (DBM)
HUNGARY	Attila Csorbai (BM)	György Endrödi (DBM)
ITALY	Mario Veronesi (BM)	Lara Sanfrancesco (DBM)
NETHERLANDS	Gert Jan Oplaat (BM)	Peter Vesseur (DBM)
POLAND	Piotr Kulikowski (BM)	Lukasz Dominiak (DBM)
PORTUGAL	José António dos Santos (BM)	Avelino Gaspar (DBM)
ROMANIA	Ilie Van (BM)	Ovidiu Oprita (DBM)
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

AUSTRIA

QGV - Austrian Poultry Health Service
Bahnhofstrasse 9
3430 Tulln
Austria

Phone: +432272/82600-12 - Fax: +432272/82600-4
E-mail: office@qgv.at
www.qgv.at

BELGIUM

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

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

CZECH REPUBLIC

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

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

DENMARK

Danish Poultry Meat Association
Axelborg
Axeltorv 3, 7th floor
1609 Copenhagen V
Denmark

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

FINLAND

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

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

FRANCE

Fédération des Industries Avicoles (F.I.A.)
184, rue de Vaugirard
75015 Paris
France

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

Comité Interprofessionnel de la Dinde (CIDEF)
ZAC Atalante Champeaux
3 allée Ermengarde d'Anjou
F-35000 RENNES
France

Phone +33 2 99 60 31 26 - Fax +33 2 99 60 58 67
e-mail: cidef@wanadoo.fr
http://www.cidef.net

GERMANY

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

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

HUNGARY

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

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

ITALY
UNAITALIA - UNIONE NAZIONALE FILIERE AGROALIMENTARI CARNI E UOVA
Via Torino 146
00184 Roma

Phone +39-0645541050 - Fax +39-0645497540
mail unaitalia@unaitalia.com
www.unaitalia.com

NETHERLANDS
NEPLUVI
Postbus 331
3990 GC Houten
Netherlands

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

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

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

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

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

ROMANIA
UCPR - Uniunea Crescatorilor de Pasari din Romania
B-dul Ion Mihalache, nr. 106, bloc 84, sc. A, apt. 24, Sector 1
Bucuresti
Romania

Phone: +40 (0)21 666 37 65
Fax: +40 (0)21 666 37 65
E-mail: ilievan@yahoo.com
http://www.desprepui.ro

SPAIN
AMACO
Diego de León 33, 4° D
28006 Madrid
Spain

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

PROPOLLO
Diego de León 33, 4° D
28006 Madrid
Spain

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

SWEDEN
Svensk Fågel
105 33 Stockholm
Sweden

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

UNITED KINGDOM
BPC - British Poultry Council
5-11 Lavington Street
SE1 0NZ London

Phone: +44 203 544 1675
info@britishpoultry.org.uk
http://www.britishpoultry.org.uk

avec

Association of Poultry Processors and Poultry Trade in the EU Countries