2016

ANNUAL REPORT

avec

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

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a.v.e.c. *. thanks BPC, CIDEF, ROSE POULTRY, for their contribution to the Annual Report 2016*

INTRODUCTION

Europe is facing a period of uncertainty and the greatest challenge is to manage change in combination with sustainable production, profitability, and growth.
The European Commission is aiming to create jobs and growth. It is the Commission's intention to "look for solutions that take advantage of all the opportunities". Through the Regulatory Fitness and Performance Programme the Commission is aiming at making EU law lighter, simpler, and less costly.

The European Union has to assess its opportunities and must continue to invest for the strong growth we need for a healthy future: our EU poultry sector is one of these opportunities.

European poultry production has demonstrated its focus on quality, food safety, and sustainability, to answer to demands from society and consumers. The confidence of European consumers in poultry meat from the EU is crucial. Consumer trust may be undermined by doubts about imported poultry meat and its compliance with European standards. The European Union has a responsibility towards consumers and producers, and must create a fair competitive situation for European poultry meat by imposing identical, and not just equivalent, rules on imports.

EU is already open for imports, which are higher in value than our exports, by 200 million. We are importing 25 % of the consumed boneless breast meat…and we want to say it is enough! We have in mind our international threats with our competitors from 3rd countries: USA, Mercosur, China Ukraine and Russia. The European producers are exporting whole chickens and poultry cuts with bone-in to balance the market and these products have a lower price both inside and outside the European Union.
The total meat consumption in the EU is remaining almost static. The trend of poultry meat consumption in the European Union and globally is still positive, which means that it is expected that world poultry meat consumption will overtake pork consumption in the coming years. This is thanks to several comparative advantages over other meats, as e.g. affordability, convenience, absence of religious guidelines limiting consumption, healthy image, limited GHG emissions and lower production costs.
For the success of tomorrow, the poultry industry needs to invest today. Therefore a.v.e.c. has looked at the research priorities and projects for the poultry sector under the Horizon 2020 and the future program in FOOD 2030. The European Union will support by these programs innovation and enabling the industry to remain competitive on domestic and external market. This will help to keep the employment in the poultry value chain which is estimated at more than 300,000 people.

The Farm to Fork approach is the key element in the food chain information as it enables the businesses to follow and control the practices and procedures used all along the food chain. Together with the precautionary principle, science and rigorous controls are creating the guarantee that the poultry meat and products thereof are safe, nutritious, and wholesome. That is why consumer confidence is justified.

In a moment of strongly politicised social and scientific debate on antimicrobial resistance, the European poultry sector is proud of the efforts and results that have been achieved in the last years. The reduction of the use of antibiotics shows that the poultry producers are using antibiotics in a prudent way. This is also thanks to the partners in the poultry production chain taking their responsibility in the "one health approach and their focus on the principle "prevention is better than cure". However, the members of **a.v.e.c.** have learnt on the field that animals need to be treated when they are sick to guarantee their level of welfare. The one health policy approach is essential to reduce and control antimicrobial resistance in both humans and animals.

Looking at the disease situation of poultry in the European Union it is obvious that Avian Influenza is here to stay. So far in 2016 the outbreaks of HPAI have been limited to France and Italy and in addition to these countries LPAI has been detected in United Kingdom, the Netherlands and Denmark. It shows that EU producers and their partners in the supply chain, guided by risk management measures, have to continuously improve the biosecurity although this will not eliminate the risk completely.

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 and to maintain the consumer confidence in our EU poultry meat production.

Paul Lopez
President

Cees Vermeeren
Secretary General

“Market orientation of the poultry meat business from European and global perspective”

a.v.e.c. – OUR ASSOCIATION

Who are we?

a.v.e.c. is a voluntary, non-profit association created in 1966 with the objective of representing and promoting the interests of the European poultry sector. Our members are national organisations representing poultry processors and the poultry trade in 16 EU countries. **a.v.e.c.**'s members represent 95% of the EU poultry meat production.

a.v.e.c. seeks to improve the drafting and implementation of EU legislation, which may benefit the poultry sector and EU consumers. We strive to continuously enhance 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. 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 an intermediary and adviser to its member organisations.

The Presidency and the Board

The Presidency of Paul Lopez from the French association FIA (Fédération des Industries Avicoles) started in October 2014.
The president chairs the board meetings and the General Assembly, participates in the different Working Groups and assists the secretariat in its daily work whenever possible.

a.v.e.c. has four vice-presidents who assist the President in his task. The vice-presidents elected in the General Assembly in Marseille in 2014 are Piotr Kulikowski from KRD (Poland), Paul-Heinz Wesjohann from BVG (Germany), Philip Wilkinson from BPC (UK) and Javier Rodriguez from Propollo (Spain). Unfortunately we are very sad to report that Javier Rodriguez Spain passed away on June 1st 2016. In September 2016 the General assembly will have to decide about the vacancy and the re-election of president and vice-presidents.
The Board of **a.v.e.c.** is fully supporting the re-election of Paul Lopez during the 59th **a.v.e.c.** General Assembly in Lisbon, for a second mandate as president of **a.v.e.c.** as well as the re-election of the 3 current vice-presidents Piotr Kulikowski from KRD (Poland), Paul-Heinz Wesjohann from BVG (Germany) and Philip Wilkinson from BPC (UK). **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

avec

bpc

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.

a.v.e.c. shares its Brussels offices and team with the European Live Poultry and Hatching Egg Association (ELPHA), which 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. The close connection between a.v.e.c. and ELPHA 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, and ERPA, the European Rural Poultry Association.
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 results in common positions. 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 23 Country Members and 52 Associate Members, subdivided in producers/processors (22), suppliers (23) and end users (7).

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

Since 1st of June 2015, The Brazilian, Marilia Rangel, former foreign markets coordinator with the Brazilian Association of Animal Protein (ABPA), has been appointed Secretary General of IPC and is full-time dedicated to the post.

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
- Abu Dhabi, 2016
- Lisbon, 2016

Creation of IPC working groups:

In the new IPC's Strategic Plan, adopted at Rome meeting in April 2015, members have agreed to establish working groups in key areas of IPC involvement. The main role of these working groups is to develop positions and policies on issues that are relevant and important to the global poultry industry, and to provide inputs to bodies setting up global standards of significance to the global poultry industry.
Permanent working groups have been established in four areas, each of which has been assigned an Executive Committee sponsor:
-Animal Health and Welfare, Vivien Kite of the Australian Chicken Meat Federation;
-Processing and Food Safety, Cees Vermeeren of **a.v.e.c.**;
-Marketing and Consumption, Robin Horel of the Canadian Poultry and Egg Processors Council;
-Environment and Sustainability, Ricardo Santin of the Brazilian Association Animal Protein. These working groups have started the work in Abu Dhabi in February 2016. Additional ad hoc working groups may be formed if matters issues arise that fall outside the scope of the permanent working groups, or in the event of crossover issues in the areas of interest.
The intention is that, through this reinvigorated working group arrangement, IPC will more effectively capture the skills and input of its membership in order to reach consensus positions on issues impacting the poultry industry globally and to progress key objectives of the organisation.

a.v.e.c. FOCUS

This section gives an overview of the main themes **a.v.e.c.** has worked on during 2015-2016. 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.

MARKET ORIENTATION OF THE POULTRY MEAT BUSINESS FROM A EUROPEAN AND GLOBAL PERSPECTIVE

In a rapidly changing world it is a great challenge for entrepreneurs in the poultry meat sector to keep their business model up to date. To keep the business profitable both consumer and customer confidence is essential. This is also the case for the work **a.v.e.c.** is doing in the interest of European poultry meat business for the past 50 years.

WHAT IS MARKET ORIENTATION?

Market orientation is defined as "a business model that focuses on delivering products designed according to customer desires, needs, and requirements, in addition to product functionality and production efficiency (i.e., production orientation)." For an industry like the poultry meat sector it starts with the production of raw meat where possible innovation may seem limited. However even then it is feasible to develop specific products and preparations thereof that attract the attention of consumers to purchase them time and again. Producers are permanently busy developing products, modes of production, brands, processing methods… in order to respond to consumer needs and behavior with regard to meat consumption. Strong market orientation of companies may recognise consumer needs at an early stage before it is generally visible. Market orientation may not be isolated or separated from product orientation with the focus on excellence from a technical point of view. It is fascinating to see how companies can balance both market and product orientation in their business model.

WHAT MAKES EU POULTRY MEAT MARKET ORIENTED?

The market orientation of the poultry meat sector is facilitated by the characteristics of the poultry meat production that cumulates many advantages compared to other meat sectors.

Short production cycles

First of all, the short production cycle enables producers to respond quickly to market signals, whilst also allowing for rapid improvements in genetics, animal health, and feeding practices. While biological production cycles for beef and pork are respectively 24 months and 12 months, poultry's production cycle is 5 months and grants much more flexibility and reactivity to the producers to adapt.

Vertical integration of the supply chain

Vertical integration is organized in different ways. The strongest form is when a company is active in two or more adjacent stages of the production chain from breeding to consumption and sometimes including the important feed supply chain. Another way is that the companies in the different stages including the farms are cooperating in partnership with each other. The main objective or reason for vertical integration may be different. The driving force may be to benefit from the economies of scale by grouping the different activities along the production chain within the same actor/company. But vertical integration may also be an efficient means for the market orientation giving the opportunity to respond well to specific consumer demands. Today, in the EU poultry meat sector, vertical integration is common practice and essential for the business to control all aspects of the production chain from the breeding activities, hatching of the eggs, feed milling, growing of the birds to the slaughtering and further processing of the meat and delivery to consumers by retail, food service, institutes etc. Many companies are at least semi-integrated meaning that the slaughterhouse and or feed manufactory are managing the poultry supply chain in at least one other stage from the parent stock farm, the hatchery and the rearing of slaughter poultry.

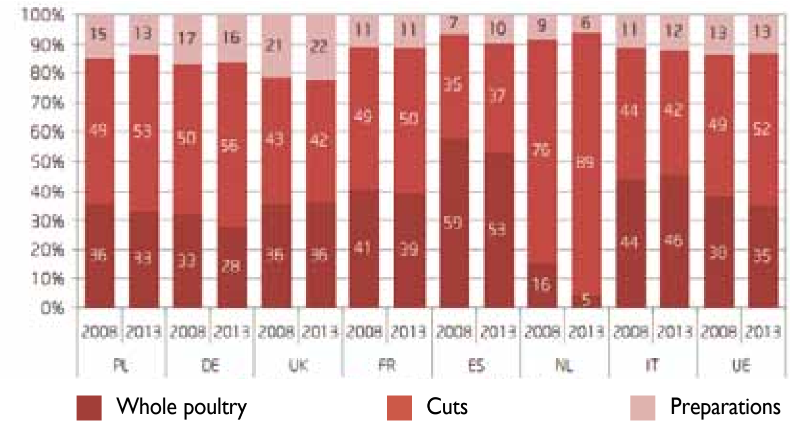
Characteristics of the poultry meat

The market orientation of the poultry meat sector is also reinforced by the several comparative advantages compared to other meats. Among these different characteristics we can mention the affordability (price per kg of poultry meat is cheaper than pork, beef or lamb meat), convenience, absence of religious restrictions, health image (low fat content and good and balanced protein content) and good environmental performance with low GHG emissions. Poultry also has the advantage that whole birds can be consumed in one meal compared with beef and pork. In addition farmers may more easily start with poultry production. There is a smaller investment when starting the business which may be done step by step to get the economical needed capacity or to combine with other agricultural activity, a faster return on investment (linked in particular to the short production cycles mentioned earlier), a greater adaptability (to the different production types, possibilities to raise different species depending on the seasonality and market demands) and lower labour and maintenance costs per unit of production.

WHAT ARE THE CONSEQUENCES OF THIS MARKET ORIENTATION FOR THE POULTRY MEAT SECTOR?

This market orientation of the sector has influenced the evolution of the structure of European poultry meat sector over the past 10 years. In particular, the segmentation of the products offered to the consumers in retail has changed with a diminution of the production of whole chicken to more profitable of cuts and processed products. Although there are clear differences between Member States with several countries that are traditionally consuming more whole chicken (Spain, Italy, France), this trend from whole chicken to cuts/preparations is happening in the majority of Member States and is expected to continue.

Evolution of the poultry meat production by types of products in selected countries between 2008 and 2013[1] :



This adaptation of the marketed products has promoted the increased demand for poultry meat, leading to an increase in chicken meat consumption per capita by 7,2 kg between 2000 and 2014 (from 14,8 to 22 kg/per capita).

On a global scale, poultry meat consumption has also continuously increased over the last decades and is predicted to keep the same path in the future (see details in page 28-30). Although the development of middle classes and increase in purchasing power in developing countries mainly explain this trend, the characteristic of the poultry meat sector allows producers to respond to the growing demand for animal protein rapidly and the characteristics of poultry meat (affordability, convenience, no religious restrictions) are perfectly matched with the needs and demands of these new consumers.

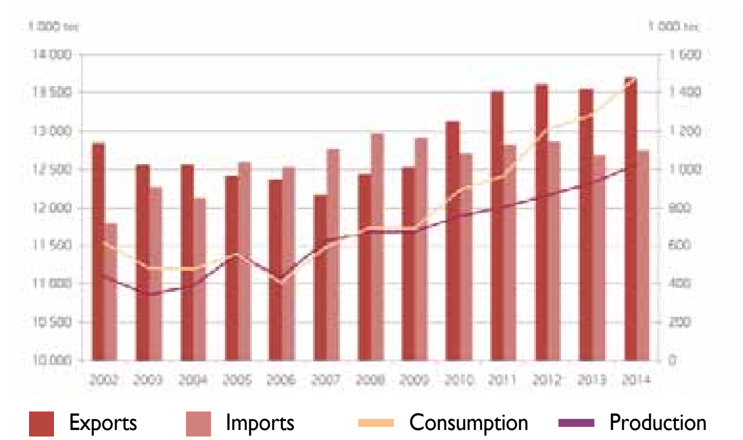
In the US, which is a mature market for meat products, chicken has become the most popular protein meat surpassing beef for the first time in 100 years in 2014 while chicken meat is the "preferred meat of the X generation". Brazil shows also a fantastic picture with a huge growth in poultry meat consumption per capita from 29,9 kg in 2000 to 45 kg in 2014.

Another positive effect of this market orientation is that it may reduce the risk of a market crisis in the poultry meat sector due to overproduction or market inefficiencies. The market orientation of our sector allows it to respond rapidly to consumer demands and to adapt adequately in case of a crisis. This is why the main crisis that the EU poultry meat sector had to endure was caused by Avian Influenza disease in 2006 and not due to intrinsic market issues, as we frequently and currently observe in the dairy or pork sector. Consequently the poultry meat sector is much more autonomous and less dependent on public support than other agricultural sectors. Since the abolition of export subsidies in 2013, the poultry meat sector does not benefit from any public market interventions at EU level.

[1]http://www.franceagrimer.fr/content/download/43692/416225/file/ETU-VBL-VOL-Evolution%20des%20fili%C3%A8res%20avicoles%20europ%C3%A9ennes%20depuis%202000.pdf
[2]http://www.franceagrimer.fr/content/download/43692/416225/file/ETU-VBL-VOL-Evolution%20des%20fili%C3%A8res%20avicoles%20europ%C3%A9ennes%20depuis%202000.pdf

Market orientation of the sector has also contributed to the development of internal and external trade in the EU. EU poultry meat market is the most opened meat sector in the EU in terms of trade since the EU is importing more than 800 000 T and has exports of more than 1,4 M T to third countries. Consumers in the EU have a preference for boneless meat cuts mainly from the breast, but you find also boneless thigh meat in retail shops. So EU production is very much focused on breast meat for the EU market and the dark meat is destined for third country markets, where this meat is preferred for taste or budget reasons. Off course, the substitution in the production is the answer to the changed consumer demand (diminution of whole chicken and increase of cuts and processed products) observed over the past 10 years. The increase in consumption of cuts has had an influence on the structure of the EU trade. We find the same type of consumption pattern in the US, with preference of the domestic consumers for white meat leading to exports of the surplus of dark meat in the world market.

Structure of the EU poultry meat sector between 2002 and 2014[2] :



In conclusion we may say that an important part of the EU and global poultry meat sector has developed driven by market orientation. The characteristics and structure of the poultry meat sector offer the framework to adapt to consumer expectations and demands. Thanks to this market orientation, poultry meat producers in the EU have successfully reoriented their choices to match consumer needs, leading to the growth of the poultry meat consumption. In parallel, market orientation has strengthened the autonomy of the sector and its resilience which are lowering the risk and occurrence of a market crisis.

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PRESENTATION OF THE A.V.E.C. WORKING GROUP ON ANIMAL HEALTH AND ANIMAL WELFARE BY THE CHAIR, HARALD SCHLIESSNIG

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

The Working Group has met four times up to June 2016 and several experts from the Commission were invited to discuss the following topics:

The use of coccidiostats in Poultry

There is an ongoing discussion about the use of coccidiostats under the feed additive legislation. There is a rationale why some coccidiostats are under the feed additive legislation. In the species where the EU has registered coccidiostats as feed additives (i.e. poultry and rabbit), coccidiosis is a systematic disease that can occur at each production cycle if not prevented. In the past, the EU decided that since the disease was systematic, no diagnosis was needed and therefore a prescription wasn't necessary. It is important to note that in the species where coccidiosis is not systematic like cattle, coccidiostats are not registered as feed additives. In the last WG meeting in June officials of DG SANTE explained that the Commission has no intention to change current legislation but is conscious that the discussion is not finished yet. **a.v.e.c**.'s position is to keep the status quo and will oppose any proposal to move coccidiostats into the medicated feed legislation.

a.v.e.c. Transport Guide

In November the legislative veterinary officer of DG SANTE Animal Welfare Unit clarified that the Health and Food Audits and Analysis unit (former FVO) together with the national contact points in the Member States developed a guidance for best practice on the welfare of poultry in transport - "Network document on poultry transport". This guidance focuses on the competent authorities and how they could improve their enforcement work.

COM stressed that this document is not legally binding but a kind of "Wikipedia for authorities". The document appears to be legally weak but experts remarked that since it is addressed at Competent Authorities they might use it to lay down a stricter interpretation of Regulation EC 1/2005. In a meeting with national contact points **a.v.e.c.** had the opportunity to present and explain the guide **a.v.e.c** was drafting.

In March this year **a.v.e.c.** board adopted the **a.v.e.c.** European poultry Transport Guide. Both FVE and CopaCocega supported this guide.

Avian Influenza from 2015 to 2016

This year several new outbreaks of HPAI ocurred in Europe and worldwide. Avian influenza is still a serious threat to the poultry sector with the potential to heavily impact both the animal health status and production in Europe as well as having a huge impact on international trade

During the February WG, **a.v.e.c.** exchanged views on the AI situation with the Veterinary Legislative Officer from DG SANTE – Unit Animal Health, crisis management. The Commission shared an update of the European situation regarding AI and how Member States deal with this disease.

OIE on Avian influenza:

The secretariat contacted the OIE representative to discuss the procedure around the notification of self-declaration of country freedom by OIE members. Currently self-declaration is made under the full responsibility of the member country concerned and the OIE is not responsible for inaccuracies in self-declarations concerning the status of a country or a zone.

EPB and ELPHA stressed the importance of having a database of self-declarations on the OIE website to make it easier for OIE members to collect information about the AI disease status of another OIE member, in addition to the bilateral communication between OIE members.

It is essential that suspensions and recovery of official disease status is handled in an objective and transparent manner, governed by the Standard Operating Procedures.

Animal health

The Regulation EU 2016/429 on transmissible animal diseases (Animal health Law) was adopted by the European Parliament and the Council on the 9 March 2016. The Regulation entered into force the 21 April 2016 and it will apply as of the 21 April 2021 (in 5 years). Delegated and implementing acts will be developed over the next three years to complement the framework law. The Commission is intending to adopt the key delegated acts (DA) and implementing acts (IA) 24 months before the date of application of the Regulation.

a.v.e.c. welcomes the law and is willing to actively cooperate and discuss with the European Commission and the Member States to ensure a harmonised implementation and enforcement by appropriately defining delegated and implementing acts[1]

[1] Regulation (EU) 2016/429 of the European Parliament and of the Council of 9 March 2016 on transmissible animal diseases and amending and repealing certain acts in the area of animal health ('Animal Health Law') http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2016:084:TOC

Commission Workshop on antimicrobial resistance on the 16th February 2016

The aim of the WS was to facilitate useful discussion among all stakeholders involved (from both human health and animal health). In the second part of the WS, participants were organized into small groups discussions, with plenary discussions kept relatively brief.

Use of antimicrobials

EFSA-EMA (European Medicines Agency) request for information on guidance/agreements/controls on the use of antimicrobials in food-producing animals in EU Member State

a.v.e.c. secretariat stressed the work being done by the different partners in the poultry value chain on the responsible use of antibiotics which will lead to a reduction in the use of highly criticial antibiotics as defined by the WHO of being of importance to human health. The impact of these guidelines should not be overestimated, and they may help to promote a more prudent use of antibiotics.in food producing animals.

EC request for update on the impact on public health and animal health of the use of antibiotics (colistin) in animals (11/01/2016) ;

The European Medicines Agency (EMA) received a request from the European Commission to update its advice on the use of colistin, which is an antibiotic of last-resort to treat certain bacterial infections in humans. This follows the recent discovery of a gene that causes bacteria to become resistant to colistin, the gene was first detected in bacteria (called Enterobacteriaceae) that were isolated from pigs, pork and chicken products and from a small number of humans in South China. Since the gene was first detected it has subsequently been found also in the European Union (EU).

In February 2016, new advice was published on public health and animal health impact of the use of colistin following the recent discovery of the first resistance gene in China[2].

[2] Advice on the impact on public health and animal health of the use of antibiotics in animals (colistin) following the recent discovery of the first mobile colistin resistance gene
http://www.ema.europa.eu/docs/en_GB/document_library/Other/2016/02/WC500202544.pdf

Welfare: harmonised framework

The European Commission is willing to undertake the road of soft governance on animal welfare mainly encouraging a deeper stakeholders' cooperation and the drafting of European guidelines.
A clear example is the high expectation the Commission accredits to the outcomes of the pilot project on best practices on animal transport (running from 2015 to 2018), supported by the European Parliament.

Above all **a.v.e.c.** urged the Commission to firstly ensure a proper implementation and harmonization of existing EU rules rather than creating new legislation. In the long run, introducing new European guidelines without a common level playing field in Europe will not be sufficient nor effective. Of importance is simplifying existing legislation, giving more flexibility to operators and reducing the high administrative costs they carry.
According to the Eurobarometer poll, EU citizens think the welfare of farm animals should be better protected, however, when asked if consumers would be willing to pay more for food produced in a way that was animal-friendly, the survey showed large divergences dependent on the average spending income of the different Member States in the EU.

With this intention **a.v.e.c.** believes that the introduction of higher animal welfare standards without an appropriate impact assessment will lead to higher costs for the food business operators, market imbalance and further loss of harmonisation. Likewise it is important that imports from third countries are fully compliant with EU legislation. **a.v.e.c.** reminded the Commission that welfare standards may also have a negative impact on the exports of poultry meat and that it will be difficult to impose standards that are not legally mandatory on imported poultry meat.
Over all **a.v.e.c.** is strongly committed to cooperate and assist the Commission in improving the quality and sustainability of the existing livestock system.

[3] Eurobarometer Survey on "Attitudes of Europeans towards Animal" requested by the European Commission, Directorate-General for Health and Food Safety and co-ordinated by the Directorate-General for Communication: Welfarehttp://ec.europa.eu/COMMFrontOffice/PublicOpinion/index.cfm/ResultDoc/download/DocumentKy/71348

PRESENTATION OF THE A.V.E.C. WORKING GROUP ON FOOD SAFETY AND FOOD QUALITY BY THE CHAIR, BIRTHE STEENBERG

Birthe Steenberg,
Chair of the Working Group
on food safety and food quality

The Working Group on Food Safety and Food Quality

The Working Group on Food Safety and Food Quality held its first meeting on November 2015 and had up till June 2016 held 3 meetings. It consists of expert representatives from nine Member Countries of **a.v.e.c.** The participants appointed representing poultry business and poultry associations are Chair Birthe Steenberg (DK), Co-Chair Richard Griffiths (UK), Paul Lopez PL (FR and **a.v.e.c.** President), Julie Mayot (FR), Pia Gustafsson (SWE), Bart Spanoghe (BE), Mark den Hartog (NL), Nicolò Cinotti (IT) Dr. Michael Südbeck MS (DE), Dr. Günther Zengerling (DE), Dr. Norbert Ginten (DE) and Gyorgy Endrodi (HU).

The Working Group covers a number of issues relevant to the poultry sector including Poultry Meat Inspection, Campylobacter, use of chemical substances for decontamination of poultry meat, mechanically separated meat, classification of animal by-products, absorption of water in poultry meat and GMOs.

Food safety

The reduction in the incidence of Campylobacter in poultry is a big challenge and **a.v.e.c.** members are strongly committed to the "farm to fork" policy of the European Union. They are confident that European policy and practice will bring the success in the fight against Campylobacter as it did for Salmonella.

There has been a lot of research going on in the different Member States on the combat of Campylobacter. **a.v.e.c.** suggests that the Commission should organize a conference on Campylobacter in the near future so researchers from all the Member States can coordinate their recommendations, so future legislation on fighting Campylobacter can be based on science and generic best practices.

The poultry industry considers the use of chemical substances as a move away from the European "farm to fork" policy. Therefore **a.v.e.c.** is happy to see that the Commission has taken the authorisation of use of chemical substances for decontamination of poultry meat off the table.

Food quality

The technology and technics used in the production of poultry resulting in the presentation of poultry meat in many appearances to consumers is characterized by a high degree of mechanisation and automation. The use of machines for deboning the meat resulting into fragmented meat is a globally applied practice. The European Commission instructing the competent authorities in the Member States is not permitting a differentiation between mechanically deboned (MDM) and mechanically separated meat (MSM). The devaluation or degradation of part of poultry meat following the European interpretation is lowering the revenue and may even create extra costs for the producers in EU-28 by food waste if more MSM would end up as raw material for pet food.

a.v.e.c. has tried to get in dialogue with the Commission on this subject. Unfortunately the Commission is not willing to take any move on MSM yet. We will keep a watchful brief on this work, to minimize extra costs and food waste.

GMO

As the European Union is producing far too few feed raw materials to meet its own demand of protein in feed, it is importing about 70 % of its protein for animal feed. This makes the EU livestock sector extremely vulnerable to price volatility and trade distortions. The feed price level is essential for the sector's profitability as about 65 % of the farmers' production costs and 50 % of the costs of poultry meat are determined by the feed price. The imported crops are coming from North and South America that are cultivating GM products that needs to be authorized in the European Union. But the European Union has still a backlog in the authorization of GM.

As the issue of authorization of GM in the EU regards many businesses in the food and feed sector, the concerned sectors have joined in the food and feed chain coalition (FFC). The FFC has called the European Commission to define a robust, predictable European GM import authorisation system in order to ensure protein supplies to the EU feed and food sector. It is essential to improve the situation and avoid a system which will severely jeopardize the Internal Market for food and feed products since this will most likely lead to significant job losses and lower investment in the agri-food chain.

H2020 - Funding innovation

The European Union's investments in research and innovation through the multi-billion Horizon 2020 programme[1] aims to boost food security and innovation, environmental protection and sustainability in Europe between 2014 and 2020.
The business opportunities are favorable and the potential research possibilities are many. For the poultry sector the key research issues are in the field of disease control and prevention, food safety and meat quality, processing technology and management systems, animal welfare and health, breeding practices, shelf life and packaging, human nutrition and sustainability including side stream productions.
a.v.e.c. is committed to joining forces on a common strategic research agenda, by creating a diversified competence consortium with participation of processors and technology providers. Research projects will help the European poultry processors to maintain or even better improve their competitiveness in the global market by gaining advances in productivity, resource efficiency, quality, sustainability, safety and animal welfare. This is also important for the employment in our sector and the security of the supply of poultry meat in the EU which will be the focus of the following program FOOD 2030[2].

Campylobacteriosis

The poultry sector is committed to tackling campylobacter in line with the European farm to fork approach, our key pillars remain: research, step by step approach and time. Until now, European research programs focused on campylobacter have not delivered the successful outcomes we were expecting. Campylobacter is a difficult and relatively expensive organism to test for, it is not an ideal candidate for routine environmental monitoring as a verification of prerequisite programs. Recent research project shows how difficult it is to find interventions that may help to control it. So hopefully the project CAMPYBRO in which the members from France, Hungary, Spain and The Netherlands are participating will bring knowledge and tools for successful progress in the control of Campylobacter.

Mechanically separated meat

This matter is a continuous story with unfortunately not much progress in the direction **a.v.e.c.** would like to see. After the judgement of the European Court in October 2014 in the case between Newby Foods and the Food Standards Agency in the UK, the court in the UK had to implement this judgement in its decision. The result of this implementation today is that the UK High Court found in favour of Newby Foods and declared the product in question to be meat. This indicates that equivalent products would also eventually be judged to be meat, rather than MSM. However, the FSA (Food Safety Agency - UK) has lodged an appeal with the UK High Court, which will not be heard until February 2017. It is yet not clear if and how the Commission will accept and respect the implementation in the UK following the outcome of the Referendum about the EU membership of UK.
The Commission has till today not made any further steps in this matter although you may question if the Commission's position is in line with the judgement of the European court.
a.v.e.c believes that further delay is not acceptable as it will continue to harm the industry. The European Commission should act promptly to seek a harmonised situation across Europe taking into account also other cases in court as in Germany. Otherwise we will have an example how strict interpretation of legislation is killing innovation by new technology.
There is an EU project entitled 'MACSYS - Development of an objective method to perform quality classification of comminuted poultry meat' ongoing. This project has received funding from the European Union's Seventh Framework Program and may help the Commission to redefine its position.

[1] https://ec.europa.eu/programmes/horizon2020/en
[2] See: http://ec.europa.eu/research/conferences/2016/food2030/index.cfm

EU legislation lays down stringent requirements guaranteeing the quality of European products. In particular the Regulation 1169/2011 laying down detailed rules on the provision of food information to consumers has 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

New rules of origin apply for the labelling of fresh poultry meat since 1st of April 2015. These rules[1] introduce 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.

Labelling of meat used as an ingredient

The new rules on labelling of fresh meat have not stopped the discussion on origin labelling. Consumer associations as well as European Parliament are pressing for the introduction of mandatory origin labelling for meat used as an ingredient. The European Parliament has already voted several non-binding resolutions[2] at a large majority inviting the European Commission to propose legislation for mandatory country origin labelling of certain foods, such as milk, dairy and meat products. In parallel, several national initiatives have been authorized by the Commission to trial labelling of origin. France is planning a trial of origin labelling of milk and meat in processed products during 2 years while Italy plans to introduce mandatory country of origin labelling only for milk and milk ingredients in dairy products. The Commission refuses to legislate on this issue, basing its refusal on a report[3] showing that despite "overall strong consumer interest in origin labelling", there is no «willingness to pay» from the consumer.

As regards poultry, a significant proportion of the meat imported from 3rd countries (mainly Brazil, Thailand and Ukraine) is consumed in mass catering, food service or as meat preparations and therefore the communication about the origin of the meat is not accessible to the consumers. Therefore EU poultry meat producers believe that consumers should have better access to the information about the origin of the meat also for the products offered by these channels especially when the meat is imported from 3rd countries. EU producers have to comply with very stringent EU rules whereas imports from third countries may not be fully compliant with these same standards.

Therefore, although EU producers recognize the complexity of such labelling, **a.v.e.c.** is advocating the mandatory labelling of all products containing more than 25 % of poultry meat with the mention EU or non EU with the name of the country in case the meat is coming from outside the EU.

MARKETING STANDARDS

The Commission is currently preparing a review of Commission Regulation 543/2008 of 16 June 2008 laying down detailed rules for the marketing standards for poultry meat. 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. For the poultry meat sector it is important to maintain specific marketing standards for poultry meat instead of a general legal framework defining the basic requirements for all animal species. We believe that our sector has specificities that require specific legislation and a lower amount of legislation in this field will not be an improvement for our sector. 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 since today consumers that are looking for specific products may already find them using the existing voluntary labels. 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.

[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] http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P8-TA-2015-0034&language=EN&ring=B8-2015-0097 and http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P8-TA-2016-0225&language=EN&ring=B8-2016-0545

[3] http://ec.europa.eu/food/food/labellingnutrition/foodlabelling/docs/com_2013-755_en.pdf

ORGANIC FARMING

In 2014, the Commission has made a legislative proposal to revise the regulation on organic production and labelling of organic products. After a cold reception from the stakeholders of the sector in general and from poultry meat sector in particular, the procedure has followed the normal procedure with opinions from the Council and the European Parliament. It has now reached the final phase with the trilogue negotiations between the 3 institutions to try to find a compromise on the remaining conflicting issues.
The poultry meat sector has made several communications in which it explained that it opposes the promotion of a "food chain approach" for organic poultry which will endanger the viability of the organic production chain and lead to the decline of the poultry meat sector.
In particular, it is essential for organic poultry producers that the use of non-organic breeds for poultry production is maintained as well as the flexibility for the mandatory outdoor access for commercial poultry in case of outbreaks or during periods of high risk of contamination of notifiable diseases (e.g. Newcastle Disease, Avian Influenza). A more flexible approach is needed for organic poultry nutrition than the 30 % of the feed that should be locally produced within a radius of 150 km. These requirements seem too ambitious and difficult to meet for most of the organic poultry producers. This will not only restrict the potential growth of organic poultry production but put at risk the current organic poultry production due to a shortage of organic raw materials for feed production within the 150 km radius.

ENVIRONMENT/SUSTAINABLE PRODUCTION

Sustainability of the poultry meat production:

The poultry meat industry is fully committed to address the challenge of the climate change. Although our sector is the best performing among all meat sectors, producers consistently invest to adapt their production systems in order to improve sustainability and efficiency of the production. When implementing new environmental policies, it is essential that the economic, social and environmental pillars of sustainability are well balanced to guarantee the viability of the businesses.
Due to better conversion of the feed intake 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.

European initiatives – Industrial emissions directive

Following the Industrial emissions directive, the European Commission has to determine through the revision of the BREF documents, 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., has followed the revision of the BREF Food, Drink and Milk that deals, among many other food sector, with the further processing of the meat for the poultry meat sector.
However, **a.v.e.c.** will follow with very close attention the BREF for slaughterhouses, for which the review is not expected to start before the beginning of 2017. The **a.v.e.c.** Working Group has already prepared its comments with requirements anticipating the Commission's revision of the document. In general terms, the aim of the Commission should be to achieve an optimal level of protection of the environment, under economically and technically viable conditions allowing a certain degree of flexibility respecting the different conditions of production across Europe.

Processed Animal Protein (PAP)

The use of Processed Animal Protein has been banned in the EU since 2001 as a preventive measure against the BSE despite the 2007 EFSA opinion concluding on the absence of risk for the feeding of non-ruminant animals. The side effect of this ban is the greater dependence of the European Union towards third country imports (Brazil, USA) of feed raw materials (especially soybean) deteriorating the environmental performances of the sector. **a.v.e.c.** strongly encourages the Commission to rapidly tackle the difficulty with the introduction of a validated and approved test to control the compliance with the intra-species use of animal proteins which is a prerequisite for the reintroduction of Processed Animal Protein. The reintroduction will limit our external dependence for protein supply and improve the environmental impact of our sector while reducing food waste.

References:

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 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 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
Procedures file for the revision of the regulation on organic production:
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=&reference=2014/0100(COD)

TURKEY SECTOR 2016
by Gilles le Pottier, chair of the Turkey Working Group

Turkey production in the EU is mainly concentrated in five Member States (Germany, France, Italy, the UK and Poland) which together produce more than 80 % of all EU turkey meat. The primary breeding companies in the turkey sector are even more concentrated since only very few companies in a limited number of Member States are involved in this activity.

Market situation of turkeys

Turkey production increased slightly in 2015 in the EU (+ 2 %): Poland and Spain have been contributing the most to this increase, while Germany and France have experienced a slowing down of their production. The issue of the competitiveness of the turkey meat with broiler and other meats is not new, but it has been reinforced in some countries. For the year 2016, we do not expect a different situation, except that Polish and Spanish position will strengthen. The year 2015 was marked by favorable indicators, in particular resulting from lower commodity prices. However, the industry should remain cautious because turkey production is more sensitive than other livestock productions 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. Europe is subject to the pressure of international supply for high value products but can export only meat of lower value. Nevertheless, to increase production, it is needed to restore confidence in the future to boost investment.

Attention is also drawn to the falling level of consumption in many countries in relation to the issue of the competitiveness of turkey meat. This is becoming a matter of permanent concern and the trend may continue, given that consumer demand is for further processed products.

Welfare of Turkey

Turkeys are, like other animals, sentient beings and must be treated with respect.

a.v.e.c. believes that good farming practices and farm management are of great importance for the health and welfare of the turkey. Producers attach great importance to the welfare of animals which is important to society. The houses in which turkeys are reared for meat production are adapted to the biological needs of the turkeys and animals are protected against adverse climatic conditions, injury, fear and disease. The industry is always working on the improvements of these conditions by developing feed, housing, equipment, medicines and genetic research. The industry is also continuously working on enhancing the condition of transport for the turkeys to guarantee a satisfactory level of protection of the animal in its journey to the slaughterhouse.

Histomonosis

This disease causes a permanent and serious threat for the health condition and welfare of animals in the EU. An EFSA technical meeting on histomonosis (2013) concluded a need for coordinated assistance from all stakeholders and legislators across the EU to help alleviate animal suffering. More than the economic loss, the intensity of the disease creates a real trauma for the farmers concerned who are then reluctant to continue to choose raising turkeys. This is reinforced by the fact that no effective veterinary medicine is currently authorized for use, while no commercially available vaccine has yet been developed. The sector continues to stress towards authorities that more attention should be paid by risk managers to limit economic losses and animal suffering. In addition, public health problems associated with the use of veterinary medicines should be addressed.

Vigilance against avian influenza

The threat of an avian influenza epizootic outbreak remains in the EU. Protection and surveillance measures have shown their effectiveness in limiting the spread of the disease. Good communication and right information to the consumers are essential to avoid the media sensationalizing of the issue.

TRADE NEGOTIATIONS

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

The Working Group on Trade works for sound growth in the EU poultry sector

The Working Group on Trade held its first meeting on 10th December 2013 and had up till June 2016 eleven meetings. It is currently made up of expert representatives from nine member countries of **a.v.e.c.** The participants appointed and representing the poultry business and poultry associations are Chair, Stig Munck Larsen (DK), Anne Burgers (NL), Philip Eeckman (BE), György Endrödi (HU), Gunter Zengerling (DE), Lukasz Dominiak (PL), Gilles Le Pottier (FR), Paul Lopez, (FR and **a.v.e.c.** President), Alberto Redondo Cardeña (ES) and Andrew Large (UK) (until March 2016).

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 technical discussions agreed in the working group can efficiently pave the way for policy decisions on an informed basis taken by the **a.v.e.c.** Board.

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

The Working Group is seeking political influence on the EU policy making i.e. by having constructive dialogue meetings and exchange of views with important stakeholders in the European Commission and the European Parliament providing specific arguments outlining the key trade priorities and interests of the European poultry sector. In addition several Members of the Working Group are involved in IPC (The International Poultry Council) and in this way represent the interest of the European Poultry Industry.

During the past year the Working Group and the industry have been heavily engaged in first the South Africa antidumping duty against exports from certain Member countries and from February 2016 in the safeguard case against the EU as a whole launched by South Africa on behalf of the domestic poultry industry. The claim of injury and threat of injury to the South African poultry industry stemming from cheap and large scale imports from the EU has been clearly and consistently refuted as has the threat of re-imposing an import duty of 37 % on certain poultry products, in particular chicken.

The Working Group is closely following progress on various free trade negotiations, predominantly the TTIP negotiation between the US and the EU which is approaching a crucial stage in the negotiations which could result in failure or success. Time is running out if TTIP is to be concluded before the US president leaves office. The Committee is expecting that the ongoing enhanced Transparency Study initiated by **a.v.e.c.** and to be concluded later this year will shed light on the legislative framework and practices applied in the poultry value chain in both the USA and the EU in order to gather the best facts and knowledge available to use to form the basis for the right policy decision.

Also the free trade negotiations with respect to Mercosur and Japan are important from a defensive and offensive perspective. The Working Group is strongly opposed to open up to more imports from e.g. Brazil as long as there is no level playing field in the production standards or mutual recognition. Mercosur already today accounts for more than 50 % of the total EU imports of poultry meat. As for Japan the European poultry industry could benefit from more open access of high value products to a significant market.

The Working Group also follows up on free trade agreements already in place. The EU-Ukraine agreement on poultry is to a certain extent of concern in as much as Ukraine has not clearly demonstrated how and when they expect to comply with the EU legislation and requirements for poultry production.

Production and supply of halal poultry products is becoming more and more important due to increasing population numbers and demand in global Muslim communities. To export to these markets certain halal standards and requirements have to be met which often becomes a challenge not least because of the various standards and lack of transparency in the implementation. The Working Group has become more engaged in these issues mainly in relation to the Middle East and South East Asia.

Last but not least the Working Group tries to engage and encourage the Members to take advantage of the new EU Regulation n° 1144/2014 for the promotion policy[1] which aims at providing significant co-funding of promotion activities in the internal market and in third countries. The funding of food promotion activities will increase over the years and contribute with 200 million Euros in 2020.

The Working Group on Trade has a great interest in engaging all **a.v.e.c.** members to contribute actively to the work in order to effectively facilitate the best factual grounds for decisions taken by the **a.v.e.c.** board.

Stig Munck Larsen, Chair of the Working Group on Trade

[1] http://eur-lex.europa.eu/legal-content/en/TXT/?uri=OJ%3AJOL_2014_317_R_0004

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

The EU poultry meat market: a very open market that needs to be protected

The EU Poultry meat sector is the most open meat market in the EU with more than 870.000 T of poultry meat imported in 2015, much more than any other meat sector in the EU. Although exports exceed imports in quantity (1.490.835 T vs. 872.274 T in 2015), in value, imports surpass exports by more than 200 Million €. This means that the EU is importing high value products (mostly breast fillet) that are preferred by consumers, leading to the situation that today, 25 % of the breast meat consumed in the EU is originating from third countries (mainly Brazil, Thailand and Ukraine).

While "significant additional quantities" are predicted to be added to the existing quotas in the upcoming free-trade agreements (TTIP, Mercosur), we believe that any new concession offered to third countries should be to the detriment of the existing quotas. In addition, when negotiating TRQs, the Commission should not look at the quantities alone, but also the quality and the types of products being offered in order to avoid further disruption to the EU market.

The EU has already paid a large price in the liberalisation process and the EU institutions should be conscious that opening up the EU market further to poultry meat will very easily undermine EU poultry production for EU consumers and further damage EU producers' position on our own market.

Creation of a level playing field: fair trade versus free trade

The essential objective of Free Trade Agreements is to ensure a fair level playing field between the trading partners of the Agreement. In practice, free-trade agreements very often lead to a situation where the trade partner of the EU is put in a better situation than the EU producers allowing them to comply with standards that are less strict than EU rules or allow a shorter period to abolish EU import duties than they are allowing the EU. While EU producers have to comply with strict legislation all throughout the food chain, importing countries are inspected only at the slaughterhouse level by the FVO, meaning that the regulations applying to feed, hatcheries, farms and transport are not monitored thoroughly by the EU. This difference in applying the rules has a detrimental effect on the credibility of the EU institutions and contributes to the scepticism of EU producers in the Commission's capability to defend their interests.

This is why we advocate full compliance to the EU standards for all third countries that want to export products to the EU, not only to preserve a fair competition with EU producers but also to keep and maintain consumer confidence in poultry meat products.

Defense of the European system from farm to fork with trade partners and at international level

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.

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

The EU Commission should defend and promote the European system at multilateral level, in institutions such as FAO, OIE and Codex Alimentarius.

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 export potential for EU producers and EU industry is competitive. We are convinced that the high quality of European poultry meat may perfectly match the expectations of consumers in third countries. Therefore European promotion funding should not focus solely on so called "quality products" and should target third countries with the biggest export potential.

Impact of Brexit

The outcome of the UK Referendum on 23rd June 2016 to leave the European Union will lead to a period of uncertainty. Until the UK triggers Article 50 of the Lisbon Treaty to start the exit process, it's 'business as usual'. There is a lot of speculation about what the exit agreement might look like but we won't know the detail until at least two years following the start of the exit negotiations. Until then the UK has a seat at the Commission and will continue to participate in all discussions including those on free trade agreements.

The UK Referendum shows that there may be a need to reconsider the market access conditions in existing and future trade agreements in case a Member State leaves the European Union just as is happening in the case a country is becoming a member of the EU.

ON-GOING REGIONAL AND BILATERAL TRADE NEGOTIATIONS

The EU has started negotiations with many countries and regional entities around the world. **a.v.e.c.** is closely following 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

Negotiators finished the negotiations on Comprehensive Economic and Trade Agreement (CETA) in August 2014. Poultry meat has been excluded from the negotiations. The agreement will now be submitted to the European Parliament and the Council for approval. National parliaments will also have to announce their agreement.

UNITED STATES

The 14th round of negotiations was held at the beginning of July in Brussels. Both parties still aim to conclude the negotiations by the end of the year, before the end of Obama's presidency and the start of the new US election campaign. However this scenario is too ambitious, especially with the UK vote to leave the EU. 97 % of the tariff lines have been offered for complete liberalisation while poultry meat, as a sensitive product, is part of the remaining 3 % of the tariff lines that have not yet been offered and will be kept for the end game. **a.v.e.c.** very much regrets this situation of uncertainty and lack of transparency.

On SPS, both sides have exchanged textual proposals which are currently under consolidation. a.v.e.c. advocates that SPS negotiations should not be disconnected from market access and that all the aspects of the EU farm to fork approach should apply to US imports and the Commission must refuse the use of any chemical treatment to decontaminate carcasses.

MERCOSUR

The EU Commission and Mercosur have exchanged the first market access offer on the 11th of May after a long period of standstill of the negotiations. The offer from the EU for poultry meat amounts of 78 000t (c.w.e.) for chicken & turkey (no poultry meat preparations included) – 39 000t (boneless) & 39 000t (bone in) with a levy of €49/t. Mercosur is looking for much bigger quantities while the Commission has not disclosed what they have offered.

Poultry meat as a sensitive sector should be excluded from the negotiations as Brazil already has a large access to the EU market (almost 60 % of EU imports). Commission decided at the very last moment to withdraw beef and ethanol quantities and **a.v.e.c.** questions the arguments for the different treatment between sensitive sectors.

The EU and Mercosur will hold a chief negotiators' meeting before the summer break to take stock and prepare the schedule for the second half of the year. The first round of negotiations is set to take place in Montevideo in September, with a second round to follow in Brussels in November.

The secretariat will continue to advocate that Brazil has already a large access to the EU market and that this situation has already an impact on the concession we may negotiate with other potential trade partners that may be interesting for the European poultry sector too.

MEXICO

The European Union (EU) and Mexico agreed 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. The first round of negotiations was held in June in Brussels. The first round of negotiations focused mainly on defining the framework of the work. The next round will be held in autumn, although a formal date and location have not yet been announced.

CHINA

The Commission is currently negotiating an investment agreement with China. The negotiations concern mainly how to better protect the investments made by EU industries in China and vice-versa. The 11th round of negotiations is scheduled to take place in China during the week of 27 June 2016.

China's WTO complaint against EU on concessions on certain poultry meat products:

China has made a complaint at WTO on the tariff rate quotas that the EU agreed with Brazil and Thailand in 2006. China deems the TRQ agreements is in conflict with WTO rules as China's interests were not been taken into account sufficiently, arguing that without the existing veterinary restrictions China would/could have been a historical supplier (more than 10% share in trade flow of the products in the concerned CN). In the period 1999 – 2014, the import quantities from China never reached the share of 10% or more. The EU, on its part has scrupulously followed the provisions embedded in the WTO regulation. Arbitrators were appointed in December 2015 and both EU and China have made two written submissions. Several countries have shown interest in the case. Brazil, Russia, Thailand, USA, Canada, Argentina and India are registered as third parties and have made submissions too. Hearings were held in March and July and the decision of the arbitrators is expected in the autumn In case the decision finds in favour of China then the outcome has the potential to completely reshuffle the whole WTO quota system and would have much broader consequences than just on EU/China poultry meat trade. A favourable solution has yet to be found.

INDIA

On the 18th of January 2016, EU and Indian governments agreed to restart negotiations. Each side should assess whether sufficient progress can be made in key outstanding issues before formally resuming negotiations. Poultry meat is considered as sensitive products for India.

INDONESIA

Negotiations for a FTA agreement were unblocked at the end of April. The scoping exercise has been completed and the MS will be consulted although COM has already a mandate from the MSs asking to start negotiations with all ASEAN countries. There will be a trade mission organized by Commissioner Hogan early in November to Indonesia and Vietnam. This will be an opportunity to participate and exchange views on Halal issues in particular, which might be addressed in these negotiations as it is an essential element in the trade for the EU poultry meat sector.

JAPAN

The Council gave the Commission the green light to start trade negotiations with Japan in November 2012. There was very slow progress made in the 16th round of negotiations held in in April in Tokyo. Japan is prioritizing the ratification of the Trans-Pacific Partnership, and no substantive progress was made before the summer break. On SPS measures, the two are close to an agreement on equivalence for sanitary and phytosanitary measures. The 17th round of the EU-Japan FTA negotiations will be held at the end of September 2016 in Brussels.

While the objective set by the Commission was to reach an agreement before the end of 2016, Japanese trade minister has expressed that Brexit may make it hard for Japan to reach an agreement by the end of this year. **a.v.e.c.** has expressed its interests in taking an export oriented approach in these negotiations based on the concessions agreed for the US in TPP.

PHILIPPINES

The first round of negotiations was held in the week of the 23rd of May in Brussels and the date of the next round in Philippines is not yet known. **a.v.e.c.** has expressed its interests in taking an export oriented approach in these negotiations and the acceptance of regionalization, and the recognition of the EU as one entity is essential for allowing trade in good conditions.

MALAYSIA

After 4 years of blockage, the negotiations are set to restart. Since seven rounds have already taken place, negotiations should not restart from zero and it remains to be seen if the offer made in the past will be kept by the Commission. EU poultry meat producers will take an offensive stance in these negotiations and expect to benefit from at least the same conditions as the Americans in TPP. **a.v.e.c.** has asked COM to pay attention to the Halal issue and to the issue of the recognition of the EU as a single market which is important in these negotiations.

THAILAND

The negotiations are completely blocked due to the political situation in the country. Nothing will happen before the end of the year.

AUSTRALIA/NEW ZEALAND

Following the signing of TPP, The Commission intends to launch FTA negotiations with these 2 countries. COM has requested a mandate from the Council to start the talks at the beginning of 2017 at the earliest. **a.v.e.c.** asked for full liberalization with these countries although it might be difficult to export there due to SPS issues and in particular due to Infectious Bursal Disease.

Participation of a.v.e.c. to high level trade missions with DG AGRI Commissioner Phil Hogan:

In 2016, DG AGRI Commissioner Mr. Hogan has organized a number of high level trade missions with the aim to visit third countries where important opportunities exist for EU agriculture and to help open doors for new exports.

These missions gathered senior representatives of European companies/producer organisations from key agricultural sectors in the EU, to participate in meetings with local authorities and promotion activities, such as seminars, business-to-business meetings and media events.

After a first visit to Colombia and Mexico in the period 8-12 February 2016 when no **a.v.e.c.** members participated, the president of **a.v.e.c.**, Paul Lopez and **a.v.e.c.** Polish member Lukasz Dominiak, took part in the trade delegation to China and Japan in the period 16-22 April 2016 in order to promote European poultry meat sector's interests.

The next mission of this type is scheduled to Vietnam, Singapore and Indonesia, in the period 2 – 9 November 2016 and **a.v.e.c.** members have expressed interest to participate in this mission too.

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 were provisionally applied with Peru as of 1 March 2013 and with Colombia as of 1 August 2013. A duty free quota of 7500 tonnes for poultry from Peru into the EU with and annual increase with 750 tonnes has been agreed.

In April 2016, Ecuador finalized the procedure for its accession to the agreement. Contacts are maintained to explore a possibility to integrate Bolivia, which is also member of the Andean Community, into the trade deal with the EU.

GEORGIA AND MOLDAVIA

The agreements with the 2 countries were signed in June 2014 in Brussels. 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 EU legislation to improve the competitiveness of these countries. Poultry meat sector is fully liberalized with 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.

SOUTHERN AFRICAN DEVELOPMENT COMMUNIT (SADC):

The EU signed an Economic Partnership Agreement (EPA) on 10 June 2016 with the SADC EPA Group comprising Botswana, Lesotho, Mozambique, Namibia, South Africa and Swaziland. Angola has an option to join the agreement in future. The Agreement will now be prepared for signature that should come into force in October 2016. Tariff rates for poultry will not change with South Africa.
http://ec.europa.eu/trade/policy/countries-and-regions/regions/sadc/

South African safeguard investigation against EU imports:
Based upon information received from SAPA (South African Poultry Association), South Africa decided to launch in February 2016, a safeguard investigation into EU poultry meat, particularly bone-in chicken portions, imports in terms of Article 16 of the TDCA (Trade, Development and Cooperation Agreement). SAPA is alleging that the imports of "bone-in portions of fowls of the species Gallus Domesticus" from the EU are threatening to cause a serious disturbance in the South African market and asks for the imposition of a duty of 37 % on these products. At the time of writing we do not know the outcome of the procedure. **a.v.e.c.** produced a first submission in March 2016 and a second one in June 2016 after SAPA added new information tothe dossier. These submissions contained arguments defending EU producers and demonstrated that the allegations from SA producers are not justified. **a.v.e.c.** participated in a hearing with ITAC (International Trade Administration Commission of South Africa) on the 12th of July 2016, to defend its case and to further develop its arguments. In parallel to that **a.v.e.c.** is working closely with the EU Commission to get as much support as possible to defend our case. The results of the safeguard investigation will be communicated by ITAC after the oral hearing of the different entities that have requested a hearing.
The Cooperation Council in agreement with the provisions of the TDCA will then meet to decide whether the advice of ITAC will have to be followed. **a.v.e.c.** believes that the establishment of provisional duties before the meeting of this Cooperation Council will undermine the trust and reliability of South African partners in view of the upcoming implementation of the new EPA agreement (see below).
This investigation follows the imposition of company and country specific anti-dumping import duties imposed on poultry (chicken) bone-in portions in 2015 on three EU Member States, namely Germany, UK and the Netherlands. The final duties that currently apply on companies from UK, Germany and the Netherlands range from 3.86% for Dutch plants to 73.33% for German plants.

UKRAINE

The DCFTA has been fully ratified since the 1st of January 2016 and EU producers are now able to benefit from the quotas embedded in the agreement (TRQs of 8000 - 10 000 tonnes for poultry meat and an additional quota of 10 000 tonnes of frozen carcasses all expressed in net weight). Ukraine benefits from duty free Tariff Rate Quotas of 20.000 tonnes for frozen poultry carcasses (all expressed in net weight) and 16.000 tonnes poultry meat and poultry meat preparations with a linear increase in 5 years' time to 20.000 tonnes.
a.v.e.c. regrets that a fair level playing field between producers in the EU and Ukraine is disturbed due to the fact that not all EU standards are met by products coming from Ukraine and that the VAT system in Ukraine is highly subsidizing the agricultural businesses. Similar standards to the ones applying to EU producers should be required by the Commission. At the end of June 2016 **a.v.e.c.** particpated in an EU – Ukraine business meeting. **a.v.e.c.** emphasied in its presentation the need for a fair level playing field. It is obvious that the Ukrainian poultry industry has a very great interest in the EU market and is looking for more access also for organic products. Ukraine advocated a more fair allocation of market access quota looking for a possibility to rearrange existing quota.

VIETNAM

Agreement was reached in August 2015. The legal review of the text has begun.
The text will then be translated into all EU languages and into Vietnamese before being presented to the Council for ratification and the European Parliament for consent in early 2017. It is expected that the agreement can enter into force at the beginning of 2018. The final version of the text has been published by the COM:
http://trade.ec.europa.eu/doclib/press/index.cfm?id=1437
As regards poultry meat, exports to Vietnam will be liberalized within ten years and imports into the EU within seven years. Regarding SPS, Vietnam will accept regionalization, recognition of the EU as a single entity and strong rules of origin have been embedded in the agreement.

WEST AFRICA

The EU has initialled an Economic Partnership Agreement with 16 West African states (Benin, Burkina Faso, Cape Verde, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone and Togo). The Economic Partnership Agreement with West Africa covers goods and development cooperation. Poultry meat is excluded from liberalisation and the import duty for EU poultry will be 35%.
http://ec.europa.eu/trade/policy/countries-and-regions/regions/west-africa/.

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PERSPECTIVES ON POULTRY WORLD MARKETS (2016-2025)

Global agriculture projections for 2016-2025

The prices of the main crops and livestock fell in 2015 caused by a combination of a number of factors such as several years of good harvest, reduction in the demand growth due to economic slowdown and lower oil prices. Many countries will have to face the complex burden of undernourishment, or obesity at the other end of the scale, and micronutrient deficiency due to unbalanced diets and bigger consumption of processed food products. The increased demand for food is expected to be satisfied through productivity gains mainly in developing countries. Trade should develop at about half the rate of the previous decade due to self-sufficiency policies of several countries and the shift towards more trade in value added products. Five main exporting countries will account for at least 70% of total exports and the dependency of resource from poor regions will intensify especially in North Africa and Middle East. On the import side we expect less concentration, although China is a critical market for some commodities (soybeans, dairy products and coarse grains). Agricultural prices are projected to remain relatively flat over the next decade.

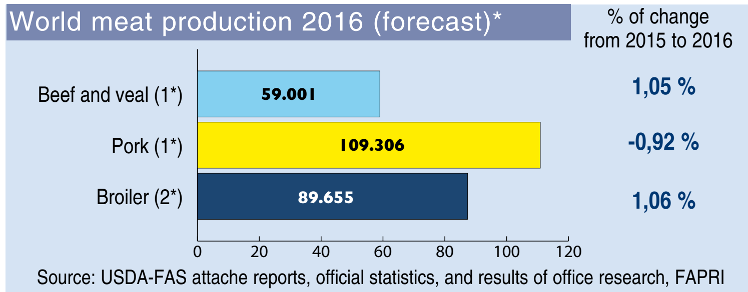
Global meat sector perspectives

Meat prices have recently decreased due to weaker demand by emerging economies in 2015 which contrasts with an extended period of continued increase since 2002. World trade in 2015 dropped off mainly due to fall of meat exports from the Americas (Avian Influenza outbreaks), the dominant supplier, in conjunction with lower imports from the Russian Federation. Nevertheless the outlook for the meat market remains strong. Feed grain prices should remain low, giving stability to the sector. Over the next decade, global meat production is projected to be 16% higher and developing countries are projected to account for the vast majority of this increase. In the bovine meat sector, after years of herd reductions, global production is expected to grow again from 2016 onwards. Pig meat production will also grow driven by China, as well as sheep meat that will experience a global growth of 2,1%/year. 10% of the meat output will be traded in 2025. Imports demand will reinforce due to imports growth in the developing world, especially in Vietnam and Africa, while developed countries will still account for more than half of global meat exports by 2025. Brazil's share of global exports will reach 26%. By 2025, prices for all types of meat are expected to rise. Global annual meat consumption per capita is expected to increase by 1,3 kg reaching 35,3 kg (r.w.e.[1]) by 2025 and it will consist mainly of poultry.

Global Poultry production projections

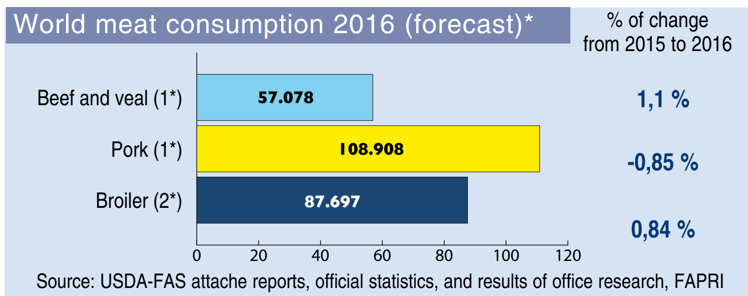
Benefiting from various competitive advantages (e.g. affordability, convenience, absence of religious restrictions, healthy image, limited GHG emissions, lower production costs, short rearing time and lower required investments), production of poultry meat will continue to grow over the next decade, accounting for half of the growth in meat production. Countries such as Argentina, Brazil, Mexico, the Russian Federation, Ukraine and the United States with surplus feed grains capacities, will strongly develop their production. Short production cycle allows producers to respond quickly to market modifications, whilst also permitting for rapid improvements in genetics, animal health, and feeding practices. Lower product prices combined with low production costs has contributed to making poultry the most favored meat both for producers and consumers in developing countries. In the EU, poultry meat production is expected to expand over the outlook period 2016 – 2025 by 3,8 %, although the rate of growth is expected to slow compared to the last decade. The strongest increase in production (1,1 % a year) is expected in the new 13 EU Member States, allowed largely by sustained productivity gains especially in Hungary, Poland and Romania. In a context of relatively low feed prices with strong domestic and world demand, EU production will reach 14,1 million tonnes by 2025.

1 Retail weight equivalent



Poultry consumption projections

Over the next decade global meat consumption will raise by 1,3 kg r.w.e.[1] mainly in poultry. This increase will largely be located in developing countries although consumption will continue to increase slightly in developed countries. Poultry will surpass pig meat as the favoured animal protein during the outlook period. Contrary to red meat, and thanks to its healthy image and affordability, poultry meat is the only meat of which EU consumption is expected to increase, to reach 22,8 kg per capita by 2025 and growing at an annual rate of 0,3 %. This rate will be lower than in previous years in the EU-N13 where markets will reach maturity. After experiencing a big drop in the short term, reflecting lower input prices and increased competition (mainly from Brazil and the USA), prices for EU poultry meat are predicted to improve, following world trend but with lower levels than in the past reaching around EUR 1 890/t by the end of 2025. Depending on developments in the macroeconomic environment and in yields, prices could vary between EUR 1 680-2 180/t by 2025.

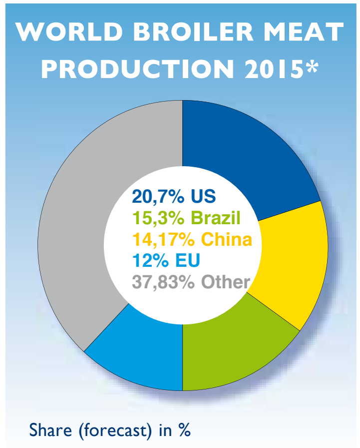


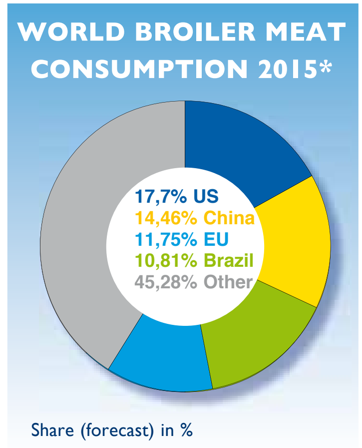
1* 1.000 metric tonnes (carcass weight equivalent)
2* 2.000 metric tones (ready to cook equivalent)
*2016 Apr. estimates

Poultry projection in trade

Globally, 10% of the meat production will be traded in 2025, and again most of the increase coming from poultry meat. World import demand for poultry meat is predicted to remain very high but will increase on a slower path (by 3,2 %/year over the next decade, vs 5,0 % over the last one), to reach 17 million tonnes in 2025. The additional demand will be concentrated in Asia, the Middle East and Sub-Saharan Africa. Russia's policy aim of self-sufficiency combined with the continued embargo on US and EU will lead to lower imports even without a ban. Thanks to its currency devaluation Brazil will increase its capacity to export, which may lead to increased competition on certain markets (e.g. whole chicken). At the same time, the economic crisis in Brazil has shifted part of the local meat demand to more affordable chicken meat, which could lead to lower competition in the first part of the outlook period. After the avian influenza outbreaks in 2015, and the agreement on a TRQ, the USA has renewed its access to the South African market, and will gain part of the EU's current market share.

EU exports will continue to rise moderately, averaging 1,4 % a year until 2025 to reach 1,6 million tonnes. In the past, poultry imports tended to remain within the TRQ level or even above with importers paying full duty. Although new TRQs agreed with Ukraine in 2013 are not yet filled, imports are expected to grow gradually close to the quota level by 2025, supported by increased production in Thailand and Brazil, the two EU's main supplier benefiting from most of the TRQs. Production is expected to raise by 25% and 15% respectively by 2025 in these two countries. Driven by promising growth in world import demand, EU exports are predicted to increase by 15 % reaching 1,6 million tonnes by 2025 but prices will be under pressure due to increased competition from Brazil and the USA. Increasing global demand will help the EU to increase exports thanks to the valorisation of different cuts.

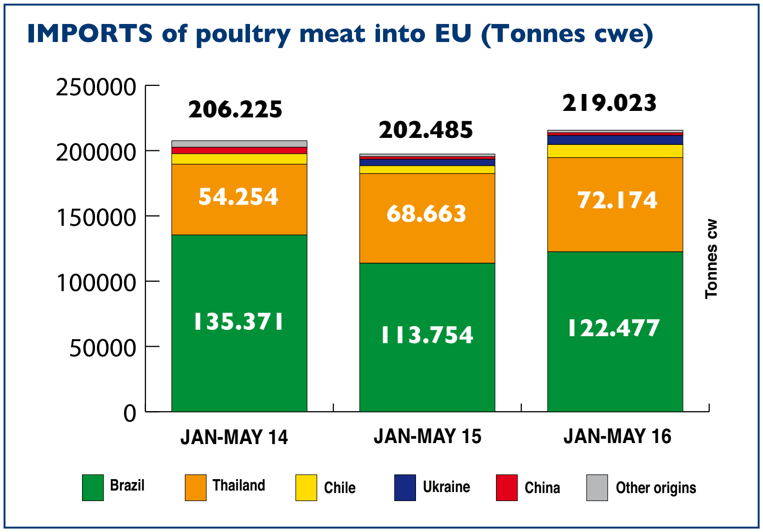


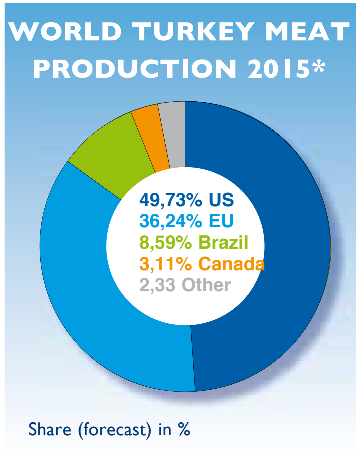


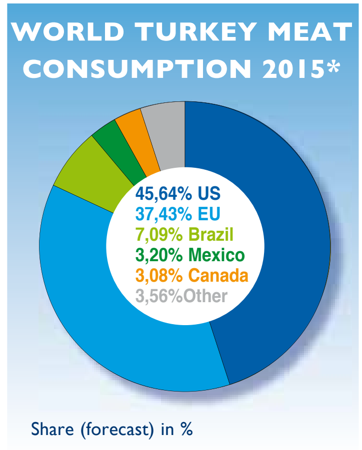
* 2016 April estimates

Main issues and uncertainties for EU poultry meat trade

- Trade policies will again remain one of the main factors impacting the outlook. The signing and implementation of several trade agreements involving some of the main meat producers could eventually diversify or consolidate meat trade significantly. In particular, the signing of the Trans-Pacific Partnership may provide increased access to selected Asian markets to suppliers located in those countries and in the US.
- Unilateral and/or unexpected trade policy decisions such as the embargo imposed by Russian Federation on foods/agricultural products imported from the United States, Australia, Norway, Canada and the European Union, are another risk factor in the projections.
- Globally, animal disease outbreaks and the sanitary and food safety issues are important factors that could impact the outlook. Depending on the duration, intensity, potential consumer reactions, and trade restrictions, the bans resulting of these outbreaks can impact domestic and regional meat production, consumption and trade.
- Another uncertainty relates to the livestock sector being considered as a key contributor to anthropogenic greenhouse gas (GHG) emissions, although poultry meat sector is the least contributor among all meat sectors. The increase demand for livestock products resulting from income and population growth may cause an increase of these emissions. Some countries may impose carbon mitigation constraints on livestock production.
- Finally and more recently, concerns have emerged regarding a link between meat consumption and human health. The announcement in 2015 of the International Agency for Research on Cancer of the World Health Organization (IARC) classified processed meat as carcinogenic which may impact projected consumption of meat in countries with high per capita consumption, although white poultry meat seems to be less afected than red meats.
- 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.







*Source: CIDEF from USDA and Agreste

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

In 2015, main producers of turkey meat remained unchanged with the US producing more than 2,7 million tonnes c.w.e. followed by the EU with almost 2 million tonnes and Brazil with 470 000 tonnes.

The US, which accounts for more than half of the total world production, is predicted to increase its turkey meat production in 2016 by about 6 %, after experiencing outbreaks of highly pathogenic avian influenza (HPAI). Flocks were hard-hit by HPAI which resulted in the loss of over seven million birds in 2015 and production in 2015 fell 2%. Globally the turkey meat production is expected to remain rather stable in 2016. Turkey exports and imports for 2016 are forecast to increase after a number of restrictions imposed on US exports following HPAI have now been removed. The 3 main producing countries will keep their leadership position on exports, with the US exporting 366 000 tonnes (13 % of its total production), followed by the EU and Brazil with respectively 135 000 t (7 % of domestic production) and 120 000 tonnes (26 % of domestic production). Imports of turkey meat are mainly concentrated in 4 countries, with Mexico importing 150 000 tonnes representing more than 50 % of the global imports, followed by the EU 63 000 tonnes (more than 21 % of global imports), South Africa 25 000 tonnes (more than 8 % of global imports) and China with 22 000 tonnes (more than 7 % of global imports).

WORLD TURKEY MEAT TRADE 2015*
(1000 tonnes - carcass weight)

	Imports	Exports
Mexico	150	1
EU	63	135
Brazil	0	120
South Africa	25	0
China	22	0
Russia	10	0
Canada	6	25
US	13	366
TOTAL	**289**	**647**

* 2016 Apr. estimates

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http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2015/fullrep_en.pdf
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EU: Balance sheet for poultry meat ('000 tons slaughter weight)

	2010	2011	2012	2013	2014	2015
Gross indigenous production	12.130	12.359	12.691	12.798	13.268	13.614
Export meat	1.150	1.290	1.313	1.300	1.350	1.397
Import of meat	796	831	841	791	816	828
Consumption	11.767	11.892	12.210	12.280	12.725	13.036
Consumption per capita, kg	20,5	20,7	21,2	21,3	22,0	22,5
Self-sufficiency %	103,1	103,9	103,9	104,2	104,3	104,4

Notes: Partial provisional or estimated.

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

PRODUCTION UPDATED 2016

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

	2010	2011	2012	2013	2014	2015
Austria (15)*	125	128	125	121	122	126
Belgium / Luxembourg (11)	250	239	250	250	250	250
Bulgaria (18)	115	110	100	97	100	102
Croatia (22)	77	75	74	68	68	77
Cyprus (25)	27	27	25	24	24	24
Czech Republic (12)	212	212	172	170	169	174
Denmark (13)	180	180	180	168	173	163
Estonia (26)	14	15	15	17	18	18
Finland (17)	96	101	108	111	112	117
France (2)	1.749	1.864	1.849	1.872	1.826	1.867
Germany (3)	1.623	1.681	1.695	1.714	1.775	1.796
Greece (16)	118	114	118	119	117	118
Hungary (8)	430	466	488	515	543	567
Ireland (14)	123	118	124	129	129	132
Italy (6)	1.221	1.232	1.261	1.259	1.261	1.307
Latvia (24)	22	23	24	26	27	27
Lithuania (19)	76	75	80	87	89	92
Malta (27)	4	4	4	4	4	4
Netherlands (7)	739	806	838	848	941	1.057
Poland (1)	1.586	1.706	1.920	1.970	2.210	2.430
Portugal (10)	337	331	324	324	327	334
Romania (9)	372	365	335	360	382	353
Slovakia (21)	90	74	75	76	77	78
Slovenia (23)	46	48	50	48	50	51
Spain (5)	1.281	1.278	1.251	1.299	1.390	1.435
Sweden (20)	86	86	86	86	86	86
United Kingdom (4)	1.568	1.558	1.607	1.606	1.587	1.625
EU-28	**12.567**	**12.916**	**13.178**	**13.369**	**13.856**	**14.410**

*ranking of the country for the variable considered for the year 2015

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)

	2010	2011	2012	2013	2014	2015
Argentina	1.643	1.694	1.710	1.825	1.979	2.048
Brazil *)	12.797	13.352	13.155	12.828	13.227	13.600
Chile	596	652	662	674	689	700
China	17.215	17.776	18.672	18.913	19.150	19.300
India	2.226	2.268	2.309	2.358	2.651	2.786
Japan	1.416	1.377	1.443	1.449	.	.
Mexico	2.715	2.798	2.826	2.838	2.880	2.988
Russia	2.549	2.875	3.285	3.448	3.973	4.180
Saudi Arabia	578	577	573	582	641	680
South Africa	1.480	1.493	1.496	1.504	.	.
Switzerland	69	73	76	80	85	87
Turkey	1.462	1.627	1.737	1.772	1.809	1.838
Ukraine	860	880	920	1.020	1.284	1.318
USA	19.608	19.796	19.944	20.235	20.450	21.064
World production	**99.345**	**102.847**	**106.014**	**109.020**	**111.800**	**114.300**

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

MEG - Marktinfo Eier & Geflügel
http://www.marktinfo-eier-gefluegel.de

TRADE

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

	2010	2011	2012	2013	2014	2015
Poultry meat [1]						
Austria (11)*	98	92	104	99	101	101
Belgium / Luxembourg (5)	162	189	222	229	240	242
Bulgaria (10)	81	102	109	88	98	103
Cyprus (24)	7	7	8	10	9	11
Czech Republic (8)	79	92	101	96	99	114
Denmark (13)	58	67	76	91	69	68
Estonia (22)	21	20	18	19	18	18
Finland (25)	5	5	5	5	7	9
France (2)	356	372	383	381	396	415
Germany (1)	491	500	514	571	597	585
Greece (12)	54	61	74	76	79	75
Hungary (18)	38	47	45	52	50	37
Ireland (9)	55	60	65	72	82	112
Italy (14)	46	54	60	63	66	68
Latvia (21)	28	28	29	30	30	22
Lithuania (19)	20	24	31	33	33	37
Malta (26)	5	5	4	5	5	6
Netherlands (4)	437	470	450	431	429	356
Poland (20)	33	33	44	40	38	35
Portugal (15)	45	48	46	53	59	64
Romania (7)	94	91	111	96	119	125
Slovakia (17)	47	46	32	57	52	48
Slovenia (23)	12	13	14	15	15	17
Spain (6)	126	124	122	127	116	131
Sweden (16)	40	38	43	46	49	52
United Kingdom (3)	380	411	393	396	387	408
EU	**167**	**184**	**184**	**149**	**152**	**154**
Salted meat [2]						
Germany	36	38	37	38	47	47
Netherlands	132	140	154	160	173	167
United Kingdom	36	47	44	50	55	59
EU from third countries	**196**	**207**	**212**	**227**	**256**	**264**
Preparations of poultry [3]						
EU from third countries	**432**	**441**	**442**	**397**	**380**	**386**

* ranking of the country for the variable considered for the year 2015

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])

	2010	2011	2012	2013	2014	2015
Austria (14)*	51	52	58	55	60	59
Belgium / Luxembourg (5)	410	436	488	473	481	528
Bulgaria (16)	46	47	47	36	41	40
Cyprus (25)	2	2	2	1	1	0
Czech Republic (17)	26	25	31	30	31	28
Denmark (10)	106	87	82	77	77	66
Estonia (24)	6	9	6	7	6	6
Finland (22)	13	15	17	18	16	17
France (4)	505	548	526	519	477	478
Germany (3)	446	467	501	510	543	497
Greece (20)	15	22	23	22	26	21
Hungary (7)	150	172	189	195	204	206
Ireland (13)	62	78	63	52	59	63
Italy (9)	150	151	149	147	149	154
Latvia (23)	7	8	9	14	15	11
Lithuania (15)	24	31	39	43	46	49
Malta (26)	0	0	0	0	0	0
Netherlands (1)	1.076	1.217	1.061	1.073	1.223	1.123
Poland (2)	412	442	528	587	714	839
Portugal (19)	10	17	18	19	20	24
Romania (11)	59	75	79	70	59	66
Slovakia (18)	30	28	34	36	37	32
Slovenia (21)	17	18	18	19	20	17
Spain (8)	128	147	129	137	178	198
Sweden (12)	44	44	51	52	60	65
United Kingdom (6)	270	195	296	350	352	291
EU-27/EU-28 (since 2013) [2]	**1.125**	**1.266**	**1.275**	**1.269**	**1.331**	**1.331**
which were						
Chicken	960	1.084	1.091	1.096	1.161	1.171
Turkey	130	143	154	142	138	134
Ducks, geese, guinea fowls	35	40	30	31	31	26
Preparations of poultry [3]						
EU to third countries	**45**	**49**	**50**	**42**	**40**	**38**

* ranking of the country for the variable considered for the year 2015

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

	2010	2011	2012	2013	2014	2015
Total imports of poultrymeat						
Switzerland	44	46	46	45	47	48
Imports of broiler meat						
Angola	239	287	301	321	365	240
China	286	238	254	260	260	268
Hong Kong 1)	295	410	370	272	299	312
Irak	522	598	612	673	730	640
Japan	789	895	877	854	888	936
Russia	656	463	560	540	385	.
Saudi Arabia	681	788	799	839	775	930
United Arab. Emirates	289	314	.	.	.	.
Exports of broiler meat						
Argentina	214	224	295	334	278	200
Belarus	38	74	105	105	113	135
Brazil	3.272	3.443	3.508	3.482	3.558	3.841
Chile	79	90	93	88	87	99
China	379	422	411	420	430	401
Thailand	432	467	538	504	546	622
Turkey	104	206	284	337	379	321
Ukraine	23	43	74	141	170	.
USA	3.067	3.165	3.299	3.332	3.312	2.886

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

CONSUMPTION

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

	2010	2011	2012	2013	2014	2015
Austria (11)*	20,5	20,8	21,1	20,6	21,1	21,0
Belgium / Luxembourg	17,0	16,8	.	.	.	.
Czech Republic (8)	23,5	24,0	23,0	22,5	22,5	23,0
Denmark	23,8	24,1	.	.	24,0	.
Finland (18)	16,7	16,9	17,4	17,6	18,1	18,4
France (7)	24,7	25,2	25,7	26,0	26,5	26,8
Germany (15)	19,1	19,4	19,0	19,4	19,5	19,8
Greece (12)	20,7	20,5	20,7	21,0	20,8	20,2
Hungary (4)	28,8	29,0	29,5	30,0	30,5	30,8
Ireland (3)	30,5	29,5	30,0	30,3	30,4	31,0
Italy (16)	18,5	18,7	19,0	19,0	18,8	19,3
Latvia (17)	19,5	19,7	20,0	19,5	19,5	19,2
Lithuania (9)	22,2	22,5	22,7	23,0	22,8	22,9
Netherlands (10)	22,5	22,1	22,0	22,3	22,1	22,1
Poland (5)	26,3	27,4	27,6	28,8	29,8	30,0
Portugal (1)	34,1	39,8	39,7	39,8	39,0	39,0
Slovakia (13)	20,1	20,0	19,8	20,0	19,8	19,9
Spain (2)	30,2	30,5	30,0	30,5	30,8	31,0
Sweden (14)	16,9	17,0	17,6	18,8	19,8	19,9
United Kingdom (6)	28,6	28,5	28,7	28,7	28,5	28,7
EU	**20,5**	**20,7**	**21,2**	**21,3**	**22,0**	**22,5**
Switzerland	17,2	17,8	17,7	17,9	18,6	18,9

* ranking of the country for the variable considered for the year 2015

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 (%)

	2010	2011	2012	2013	2014	2015
Austria (17)*	73	73	70	70	67	66
Belgium / Luxembourg	185	190	.	.	.	.
Czech Republic (15)	80	78	74	76	76	74
Denmark	146	135	.	.	.	.
Finland (6)	104	105	107	107	106	106
France (7)	114	114	110	107	105	105
Germany (4)	106	108	111	110	112	112
Greece (13)	80	80	79	78	79	78
Hungary (3)	135	136	138	137	139	142
Ireland (11)	102	104	100	100	99	95
Italy (5)	110	110	108	107	107	107
Latvia (16)	51	53	54	62	64	72
Lithuania (10)	90	93	95	95	97	96
Netherlands (1)	196	217	224	226	230	232
Poland (2)	136	139	139	140	144	150
Slovakia (14)	71	70	78	72	75	75
Spain (8)	99	101	100	100	104	105
Sweden (9)	92	95	97	96	98	99
United Kingdom (12)	88	87	89	92	93	92
EU	**103**	**104**	**104**	**104**	**104**	**104**

* ranking of the country for the variable considered for the year 2015

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)

	2010	2011	2012	2013	2014	2015
Austria (18)	90	91	89	89	91	90
Belgium / Luxembourg (8)	288	362	362	362	362	362
Bulgaria (20)	77	81	74	72	74	75
Croatia (22)	63	60	61	58	57	56
Cyprus (25)	28	27	25	23	23	23
Czech Republic (14)	181	181	158	155	161	156
Denmark (12)	175	175	175	168	173	162
Estonia (26)	14	15	15	17	17	17
Finland (17)	88	93	99	104	106	110
France (5)	1041	1096	1091	1146	1116	1170
Germany (3)	1.073	1.150	1.160	1.220	1.280	1.300
Greece (13)	160	160	160	160	160	162
Hungary (9)	240	254	280	305	329	349
Ireland (15)	109	110	116	117	118	120
Italy (7)	780	796	861	863	872	915
Latvia (24)	23	23	24	26	26	26
Lithuania (19)	76	75	79	87	87	87
Malta (27)	4	4	4	4	4	4
Netherlands (6)	664	710	738	750	926	1009
Poland (1)	1.299	1.365	1.523	1.610	1.740	1.930
Portugal (11)	269	265	258	259	262	269
Romania (10)	370	359	325	310	310	289
Slovakia (21)	79	66	66	68	69	70
Slovenia (23)	46	47	49	47	47	48
Spain (4)	1085	1073	1063	1041	1053	1178
Sweden (16)	79	80	80	90	103	113
United Kingdom (2)	1323	1297	1322	1391	1383	1418
EU	**9.723**	**10.015**	**10.258**	**10.541**	**10.949**	**11.507**
Argentina	1680	1770	2014	2060	2050	2080
Brazil	12.312	12.863	12.645	12.308	12.692	13.080
China	12550	13200	13700	13350	13000	13400
India	2.650	2.900	3.160	3.450	3.725	3.900
Indonesia	1465	1515	1540	1550	1565	1625
Iran	1.875	1.913	1.956	1.962	1.962	1.962
Mexico	2822	2906	2958	2907	3025	3196
Russia	2.310	2.575	2.830	3.010	3.260	3.550
South-Africa	1473	1486	1489	1497	1497	1497
Thailand	1.280	1.350	1.550	1.500	1.570	1.625
USA	16563	16694	16621	16976	17306	17971
World	**87.392**	**90.594**	**93.309**	**96.338**	**98.200**	**99.000**

* ranking of the country for the variable considered for the year 2015

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)

	2010	2011	2012	2013	2014	2015
Austria	12,6	13,1	13,3	13,3	13,9	14,0
France	14,8	15,2	15,8	16,2	16,9	17,5
Germany	10,9	11,4	11,1	11,7	11,8	12,1
Italy	11,5	11,6	11,7	11,7	11,9	12,5
Netherlands	18,8	18,4	18,4	18,5	.	.
Portugal	.	.	.	.	26,0	.
United Kingdom	22,2	21,7	22,0	22,5	22,5	22,9
EU-15	**16,7**	**16,8**	**17,1**	**17,2**	**18,0**	**18,4**
Third Countries						
Argentina	36,5	38,2	42,0	41,9	41,3	42,9
Brazil	46,3	47,8	46,0	44,1	44,3	45,0
China	9,1	9,4	9,8	44,1	9,2	9,2
India	2,2	2,3	2,5	2,7	2,9	3,0
Iran	22,3	23,3	.	.	.	.
Japan	16,3	16,5	17,4	17,4	17,6	17,7
Mexico	28,5	29,1	29,5	30,1	29,8	30,3
South Africa	29,0	28,9	30,2	29,5	29,1	30,0
United Arab Emirates	59,1	.	.	.	.	.
USA	43,5	43,7	42,4	43,2	43,9	46,6

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)

	2010	2011	2012	2013	2014	2015
Austria (10)*	24	25	26	22	21	20
Belgium/Luxembourg (15)	5	5	5	5	5	5
Bulgaria (22)	1	1	1	1	1	1
Croatia (14)	6	5	6	6	6	6
Cyprus (23)	1	0	0	0	0	0
Czech Republic (21)	4	4	8	1	1	1
Denmark (18)	0	2	2	2	2	2
Finland (13)	9	8	8	7	7	8
France (2)	409	406	415	386	362	350
Germany (1)	434	398	392	384	392	395
Greece (17)	3	3	3	3	3	3
Hungary (7)	100	101	95	89	93	96
Ireland (13)	8	10	9	8	7	7
Italy (3)	279	276	315	314	310	313
Malta (24)	0	0	0	0	0	0
Netherlands (9)	28	28	28	28	28	28
Poland (4)	276	272	288	280	280	312
Portugal (8)	39	38	39	39	37	38
Romania (11)	2	5	10	10	12	10
Slovakia (12)	11	8	8	8	8	8
Slovenia (20)	6	7	7	7	1	1
Spain (5)	111	104	111	177	181	187
Sweden (16)	4	4	4	4	4	4
United Kingdom (6)	162	171	196	187	172	178
EU-28	**1.920**	**1.880**	**1.974**	**1.966**	**1.934**	**1.973**
Brazil	485	489	510	520	535	.
Canada	159	160	161	165	165	.
Mexico	11	13	14	10	10	.
Russia	70	90	100	100	105	.
South Africa	52	53	53	53	53	.
USA	2.527	2.592	2.671	2.623	2.611	2.552
World	**5.463**	**5.529**	**5.682**	**5.597**	**.**	**.**

* ranking of the country for the variable considered for the year 2015

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)

	2010	2011	2012	2013	2014	2015
Austria	6,3	6,1	6,2	5,9	5,8	5,8
France	5,1	5,1	5,3	5,2	5,1	4,9
Germany	6,2	6,1	6,1	5,8	5,9	5,9
Italy	4,8	4,7	4,8	4,8	4,9	4,9
Netherlands	1,0	1,0	1,0	1,1	1,1	1,1
Portugal	.	.	.	5,0	4,9	.
United Kingdom	4,0	4,1	4,2	4,2	4,1	.
EU-27/EU-28	**3,6**	**3,7**	**3,9**	**3,9**	**3,8**	**3,9**
Third Countries						
Brazil	1,7	1,8	1,7	1,7	1,8	.
Canada	4,2	4,3	4,1	4,1	4,1	.
Mexico	1,4	1,4	1,4	1,4	1,4	.
Russia	0,7	0,8	0,8	0,8	0,8	.
USA	7,4	7,3	7,3	7,2	7,1	7,3

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

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

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DUCK

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

	2010	2011	2012	2013	2014	2015
Austria (18)	0,1	0,2	0,1	0,1	0,1	0,1
Belgium / Luxembourg (17)	0,1	0,1	0,1	0,0	0,1	0,1
Bulgaria (6)	18,0	21,0	20,1	21,0	22,0	22,0
Cyprus	0,2	0,2	0,0	0,0	0,0	0,0
Czech Republic (10)	7,3	4,9	4,2	4,8	7,3	8,3
Denmark (12)	3,8	3,5	3,5	3,5	3,5	4,0
Estonia	.	.	.	.	.	.
Finland (20)	0,0	0,0	0,0	0,0	0,0	0,0
France (1)	238,0	242,6	240,4	223,3	230,0	231,0
Germany (3)	67,3	62,4	63,3	51,3	51,1	49,3
Greece (15)	0,2	0,2	0,2	0,2	0,2	0,2
Hungary (2)	61,0	71,0	69,6	76,5	89,0	88,0
Ireland (11)	4,2	4,0	4,2	4,0	4,5	5,4
Italy (9)	14,0	14,0	14,0	13,0	11,0	9,0
Latvia	.	.	.	.	.	.
Lithuania (19)	0,1	0,3	0,3	0,3	0,1	0,1
Malta	.	.	.	.	.	.
Netherlands (7)	18,0	17,0	17,0	17,0	15,0	16,0
Poland (4)	10,5	12,0	15,7	28,5	41,5	39,0
Portugal (8)	10,0	9,0	8,5	8,0	9,7	9,8
Romania	.	.	.	.	.	.
Slovakia (14)	0,4	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
Spain (13)	4,8	4,3	6,0	5,0	5,0	1,5
Sweden (20)	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom (5)	31,0	33,0	32,1	30,4	32,1	29,2
EU	**496,1**	**508,0**	**509,0**	**496,0**	**532,0**	**523,0**
World	**4.031**	**4.183**	**4.334**	**4.367**	**.**	**.**

* ranking of the country for the variable considered for the year 2015

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, 2016-2025 (‘000 t carcass weight equivalent)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Gross indigenous Production	13.752	13.672	13.704	13.767	13.832	13.892	13.948	14.005	14.057	14.116
of which EU-15	10.203	10.160	10.170	10.191	10.213	10.231	10.244	10.260	10.269	10.286
of which EU-N13	3.549	3.512	3.534	3.577	3.619	3.661	3.704	3.746	3.788	3.830
Imports	849	911	920	929	938	947	956	964	973	980
Exports	1.430	1.339	1.336	1.374	1.414	1.454	1.493	1.534	1.572	1.613
Net Trade	581	429	416	445	476	508	538	570	599	632
Consumption*	13.170	13.243	13.288	13.322	13.356	13.384	13.410	13.436	13.458	13.484
of which EU-15	10.413	10.478	10.523	10.560	10.598	10.629	10.658	10.687	10.713	10.742
of which EU-N13	2.757	2.766	2.765	2.762	2.759	2.755	2.752	2.748	2.746	2.742
Population (in million)	509,2	510,0	510,9	511,7	512,4	513,2	513,9	514,5	515,2	515,8
of which EU-15	404,1	405,1	406,2	407,1	408,1	409,1	410,0	410,9	411,8	412,7
of which EU-N13	105,1	104,9	104,7	104,6	104,4	104,1	103,9	103,6	103,4	103,1
Per Capita Consumption*	22,6	22,7	22,7	22,7	22,7	22,7	22,7	22,8	22,8	22,8
of which EU-15	22,5	22,5	22,5	22,5	22,5	22,5	22,6	22,6	22,6	22,6
of which EU-N13	23,2	23,3	23,4	23,4	23,4	23,5	23,5	23,5	23,6	23,6

*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 2015-2025, The European Commission, DG AGRI, December 2015 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2015/fullrep_en.pdf)

AGGREGATE MEAT MARKET PROJECTIONS FOR THE EU 2016-2025 ('000 t carcass weight equivalent)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Gross Indigenous Production	46.155	46.204	46.119	46.150	46.194	46.240	46.276	46.328	46.384	46.455
of which EU-15	38.048	38.014	37.915	37.908	37.913	37.919	37.917	37.926	37.936	37.963
of which EU-N12	8.107	8.189	8.204	8.242	8.281	8.321	8.359	8.402	8.447	8.492
Imports of live animals	0	0	0	0	0	0	0	0	0	0
Exports of live animals	240	218	178	158	155	152	149	147	144	141
Net production	45.915	45.985	45.941	45.992	46.039	46.088	46.127	46.182	46.240	46.315
Imports (meat)	1.361	1.459	1.477	1.498	1.511	1.523	1.539	1.543	1.545	1.549
Exports (meat)	3.790	3.925	3.980	4.017	4.059	4.125	4.200	4.279	4.357	4.428
Net trade	2.428	2.467	2.503	2.519	2.547	2.602	2.661	2.736	2.812	2.879
Consumption*	43.481	43.514	43.451	43.480	43.492	43.481	43.463	43.446	43.428	43.436
of which EU-15	35.506	35.537	35.489	35.528	35.559	35.567	35.569	35.570	35.573	35.609
of which EU-N13	7.974	7.977	7.963	7.952	7.933	7.914	7.894	7.876	7.855	7.828
Population (in million)	509,2	510,0	510,9	511,7	512,4	513,2	513,9	514,5	515,2	515,8
of which EU-15	404,1	405,1	406,2	407,1	408,1	409,1	410,0	410,9	411,8	412,7
of which EU-N13	105,1	104,9	104,7	104,6	104,4	104,1	103,9	103,6	103,4	103,1
Per capita consumption*	67,7	67,6	67,3	67,2	67,1	67,0	66,9	66,9	66,8	66,7
of which EU-15	69,2	69,0	68,7	68,5	68,4	68,3	68,1	68,0	67,9	67,8
of which EU-N13	61,8	61,9	62,0	62,0	62,1	62,1	62,1	62,2	62,2	62,2
of which Beef/Veal	10,7	10,6	10,7	10,6	10,6	10,5	10,4	10,3	10,3	10,3
of which Sheep/goat	1,8	1,8	1,8	1,8	1,8	1,8	1,8	1,8	1,8	1,8
of which Pig meat	32,6	32,4	32,2	32,1	32,0	32,0	31,9	31,9	31,8	31,8
of which Poultry meat	22,6	22,7	22,7	22,7	22,7	22,7	22,7	22,8	22,8	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 2015-2025, The European Commission, DG AGRI, December 2015 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2015/fullrep_en.pdf)

TABLE EU 27 POULTRYMEAT IMPORT – EXPORT TRADE MAIN TARIFF LINES, 2005 – 2010 – 2014 – 2015

IMPORTS

Source: Extraction EUROSTAT, May 2016

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2014	2015	2014	2015
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	4.349.336	1.774.498	1.522.711	1.543.840	206,69	216,22
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65 % chickens'	111.011	114.059	99.294	101.461	143,31	144,08
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.419.962	1.018.232	899.529	959.968	252,35	243,93
02071460	Frozen legs and cuts thereof of fowls of the species gallus domesticus, with bone in	408.140	120.717	85.394	56.322	131,69	126,92
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	17.634	13.476	173,34	159,21
02072710	Frozen boneless cuts of turkeys of the species domesticus	173.417	144.333	98.443	103.561	291,68	346,94
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	32.804	1.956.437	2.563.291	2 642.158	239,83	243,29
1602 (poultry)	**PREPARED/PRESERVED MEAT**	3.067.385	4.287.206	3.798.899	3.857.326	330,24	350,59
160231	**TURKEYS**	945.029	844.275	486.981	488.776	317,61	307,27
16023111	**Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)**	927.933	796.703	469.861	470.432	309,79	297,88
160232	**GALLUS DOMESTICUS**	2.052.387	3.305.460	3.151.378	3.209.444	321,82	345,61
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	132.072	141.255	259,96	257,61
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	2.331.466	2.411.860	361,40	386,87
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	667.871	638.017	195,77	208,71
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	19.974	18.320	326,50	359,84
160239	**OTHER**	69.969	137.471	160.540	159.106	533,74	584,11
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	155.916	156.036	533,21	584,20

EXPORTS

Source: Extraction EUROSTAT, May 2016

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2014	2015	2014	2015
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	8.558.970	11.244.041	13.002.796	13.053.738	110,24	112,80
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	238.238	236.448	183.301	163.427	123,60	125,35
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	2.564.981	2.742.251	133,44	150,01
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.070.511	1.872.414	2.186.117	2.085.649	61,60	51,48
02071420	Frozen halves or quarters of fowls of the species gallus domesticus	386.980	1.077.792	1.481.936	1.548.090	114,33	109,36
02071430	Frozen whole wings, with or without tips of Gallus domesticus	646.017	946.854	1.467.494	1.618.162	127,35	127,43
02071460	Frozen legs and cuts thereof of fowls of the species gallus	280.842	490.015	930.346	969.380	99,24	104,11
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	851.510	738.152	91,91	97,52
02072710	Frozen boneless cuts of turkeys of the species domesticus	577.512	306.916	208.645	239.046	108,43	93,10
02072730	Frozen whole wings, with or without tips, of turkeys	178.987	217.395	394.110	351.065	144,97	143,84
0207 other		2.100.561	2.701.830	2.734.356	2.598.516	119,67	120,07
1602 (poultry)	**PREPARED/PRESERVED MEAT**	290.382	451.698	403.548	380.402	343,55	351,82
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	137.131	179.993	204.271	172.175	311,67	323,44
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	62.320	60.237	367,00	357,69
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		81.452	101.161	136.957	147.990	380,43	382,45

ADOPTED, FORTHCOMING AND PENDING EU LEGISLATIVE PROPOSALS

ANIMAL HEALTH
"Smarter rules for safer food": new proposal on EU Animal Health Law and Official controls
After provisional agreement on the regulation on transmissible animal diseases (Animal Health Law) was reached at the trilogue meeting in June 2015, the European Parliament and the Council adopted the "Animal Health Law" in March 2016. End of March the Regulation (EU) 2016/429 of the European Parliament and of the Council of 9 March 2016 on transmissible animal diseases and amending and repealing certain acts in the area of animal health ('Animal Health Law') was published in the Official Journal. The Regulation enters into force on the twentieth day following that of its publication and will be applicable in 5 years. COM will start working now on the implementing and delegated acts and will review the list of diseases in the next two years.
Regulation is available by following websites:
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2016:084:TOC
http://ec.europa.eu/food/animals/health/regulation/index_en.htm

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)
On 16th of June 2016 Commissioner Andriukaitis announced that political agreement was reached at the trilogue on the EU proposal for revision of the provisions on official controls along the food chain. The adoption process may now be finalised in Council and Parliament.
http://europa.eu/rapid/press-release_STATEMENT-16-2230_en.htm
http://ec.europa.eu/food/safety/official_controls/review/index_en.htm

Proposal for revision of the medicated feed legislation (Directive 90/167/EEC)
The proposed Regulation of the European Parliament and of the Council on the manufacture, placing on the market and use of medicated feed will repeal and replace 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. On 15 March 2016, the Committee for Agriculture and Rural Development adopted its report on the proposal and decided to open interinstitutional negotiations. After the adoption in the plenary of the European Parliament the discussions in the trilogue may begin.
http://www.europarl.europa.eu/oeil/popups/summary.do?id=1430343&t=d&l=en
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?reference=2014/0255(COD)&l=en

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.
The Committee on the Environment, Public Health and Food Safety adopted the report on the proposal for a regulation of the European Parliament and of the Council on veterinary medicinal products in February 2016. Following a discussion in the plenary of the European Parliament, the matter has been referred back to the committee and the vote on the legislative resolution has been postponed to a subsequent sitting.
Proposal for a Regulation of the European Parliament and of the Council on veterinary medicinal products
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?reference=2014/0257(COD)&l=en
http://ec.europa.eu/health/files/veterinary/vet_2014-09/annexes/annexes_en.pdf

Antimicrobial resistance (AMR)
The Action Plan against the rising threats from Antimicrobial Resistance (AMR) has been followed by a permanent attention to increase awareness that overuse and misuse of antimicrobial medicines is vital in reducing antimicrobial resistance. To tackle this issue it is key to focus on good practices of prescription and use.
The public attention to the use of antibiotics in animals will continue, but a European Barometer from April 2016 shows that more than half of the European citizens agree that sick animals have the right to be treated by antibiotics.
http://ec.europa.eu/dgs/health_food-safety/amr/action_eu/index_en.htm
http://ec.europa.eu/dgs/health_food-safety/amr/docs/eb445_amr_generalfactsheet_en.pdf

FOOD AND FEED SAFETY
Revision of the hygiene package: Reg. 852/2004 – 853/2004 – 854/2004 (on-going) - Hygiene Package, composite products and meat inspection
The revision of food hygiene law to improve food hygiene and increase food safety by introducing simpler and harmonised procedures for meat inspection has not made much progress in the past year. For the poultry meat sector the focus will be on poultry meat inspection and on specific threats such as Campylobacter. The industry has continued sampling and testing and to develop prevention methods as it is obvious that this is important to keep the confidence of consumers in the safety of poultry meat.

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). Case studies with the focus on traceability, responsibilities of food/feed business operators, risk assessment and transparency have been made too. The outcome of the study has not yet been made publicly available, but by the website of the European Commission some information of the SME survey is available.
http://ec.europa.eu/food/safety/general_food_law/fitness_check/index_en.htm

The European Union Summary Report on Trends and Sources of Zoonoses, Zoonotic Agents and Food-borne Outbreaks in 2014-
https://www.efsa.europa.eu/en/efsajournal/pub/4329

QUALITY - PROMOTION
Promotion of EU farm products:
The new promotion has entered into force on 1st December 2015 while in autumn 2015, the delegated and implementing acts relating to Regulation (EU) No 1144/2014 have entered into force together with the annual work programme establishing the priorities in accordance with Article 8 of Regulation (EU) No 1144/2014. This Annual Work Programme is renewed every year.
The call for proposals for the promotion program of the year 2017 will be published at the beginning of the year 2017. All the information on the legislation and Annual Work Programme is available here: http://ec.europa.eu/agriculture/promotion/policy/index_en.htm
All the information on promotion policy is available here:
http://ec.europa.eu/agriculture/promotion/index_en.htm

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 MEP Mr. Haussling (Greens) (procedure in the European Parliament (COMAGRI)) has been published at the beginning of May:
http://www.europarl.europa.eu/oeil/popups/ficheprocedure.do?lang=&reference=2014/0100(COD)
Position of the Council: http://data.consilium.europa.eu/doc/document/ST-9750-2015-INIT/en/pdf

TRADE
Vietnam
On 2 December, 2015 the EU and Vietnam announced they have finalised talks for a free trade agreement (FTA), marking the end of the negotiating process.
EU-Vietnam Free Trade Agreement - agreed text as of January 2016: http://trade.ec.europa.eu/doclib/press/index.cfm?id=1437
This text agreed at the end of the negotiations conducted by the European Commission will be subject to legal revision and will thereafter be transmitted to the Council of the European Union and to the European Parliament for ratification.

EPA (Economic Partnership Agreement)
On the 10th of June 2016, the EU signed the EPA with Southern African countries (Botswana, Lesotho, Mozambique, Namibia, Swaziland and South Africa). This development-oriented agreement is the first of its kind with an African region pursuing regional economic integration.
The text of the agreement is available here:
http://trade.ec.europa.eu/doclib/docs/2015/october/tradoc_153915.pdf
It will be subject to legal revision and will thereafter be transmitted to the Council of the European Union and to the European Parliament for ratification.

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