2017 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, AIA for their contribution to the Annual Report 2017*

INTRODUCTION

The European Union (EU) has some of the most comprehensive food safety standards in the world, and a well-established system of controls to make sure that those standards are met. A new publication from the EU Commission, “Ensuring food is safe – The veterinary and phytosanitary system of the European Union explained”, was published in June 2017.

a.v.e.c. has a long history on good and close cooperation with the EU Commission on food safety issues. In 2017, the Process Hygiene Criteria for campylobacter was finalised. As has been found in several Member States, there is no simple or single option for reducing campylobacter. **a.v.e.c.** is committed to sharing best practice amongst members, as we know that only a whole chain approach will make a meaningful impact.

Antibiotic use, and antimicrobial resistance (AMR), in humans and animals is one of the biggest health challenges we face on a global scale. The members of **a.v.e.c.** are very aware of the importance of prudent use of antibiotics in EU poultry production, and several members can clearly demonstrate a reduction in their usage. **a.v.e.c.** will continue to have huge focus on AMR in the years to come.

Countries wishing to export to the EU must set up an equivalent system of food safety controls to ensure that European consumers have the same level of confidence in the safety of imported food products as they do with those from the EU. A fine principle … but does it work? The recent incidents following the fraud situation in Brazil have highlighted some weaknesses and **a.v.e.c.** finds that EU needs to set up a better control system on poultry meat imported from third countries to reassure the EU consumers that imported poultry meat meets the same high standards as poultry meat produced in the EU.

Since the companies in the EU poultry meat supply chain must comply with very high standards on animal welfare, food safety and environmental protection, the sector is also confronted with extra cost compared to countries outside the EU who do not have to comply with the same extensive legislation. The EU Commission is engaged in free trade negotiations with several parties - negotiations which are intended to further liberalise trade by reducing or abolishing import levies/tariffs. This is of huge concern to the EU poultry meat producers regarding their competitiveness. Due to the higher standards leading to higher costs of production, we cannot compete on price with third countries. The EU poultry meat producers cannot accept any additional concessions in the free-trade agreement negotiations since it will have disastrous consequences on our sector employing more than 300 000 people.

At least one third of the already existing imports from third countries is arriving directly in the UK, most probably even more indirectly through other EU countries. This is a very important factor, when the situation around Brexit is to be discussed. **a.v.e.c.** is in clear agreement with its British member, BPC, that the status quo situation should be maintained and that the existing trade flows should be maintained even after the UK leaves the EU.

Furthermore a.v.e.c. finds that the EU consumer has a right to be informed on the origin of the meat imported from third countries. Therefore, all products containing more than 25 % of poultry meat should be labelled as originating in the EU/non EU + name of the country in case it is coming from out of the EU.

On the export side, several countries in Asia represent the best opportunities for the European poultry sector. This is mainly due to consumer preferences, especially for chicken meat, as the demand in these countries and Europe complements one another. In the EU, the preference is on boneless meat/breast fillets (“white meat”) so these products have the highest value. In Asian countries, these products are less preferred by the consumers who prefer the red or dark poultry meat (eg. leg quarters) and products like feet and paws.

This is creating certain opportunities for EU producers to sell products that are in over supply in the internal market at a reasonable price. Therefore, opening different markets in Asia for export of poultry meat from EU is of huge importance to **a.v.e.c.**

The Middle East as well as countries in Africa are areas where the EU poultry meat sector historically has been exporting large quantities and it is important to consolidate/develop our exports there.

Since 2015, the EU poultry meat producers have been confronted with a protectionist attitude of the South African authorities who have adopted several measures to limit the access to EU poultry meat products to their market. The EU authorities need to proactively defend the interests and the integrity of the poultry meat sector in cases like this.

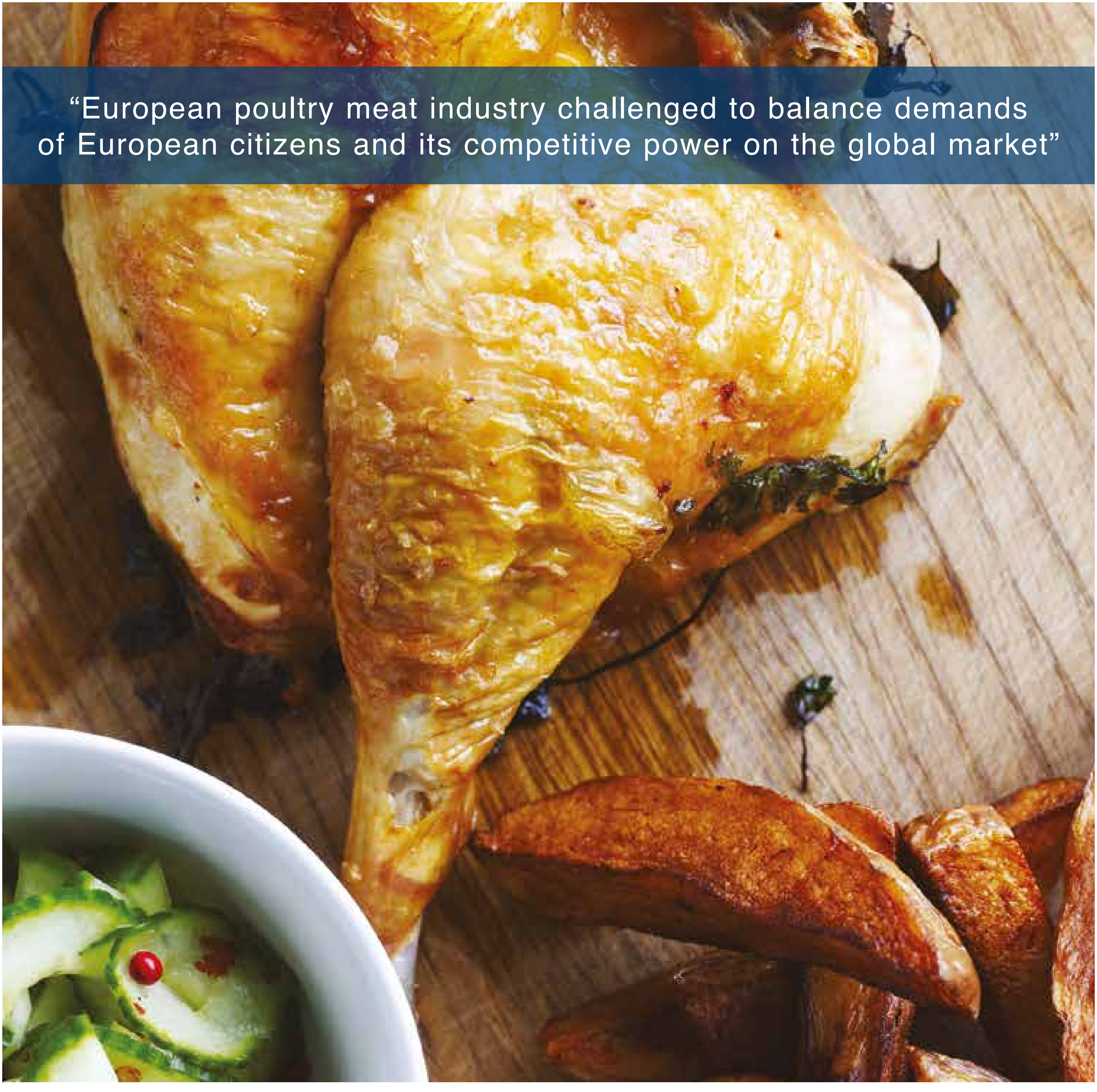
In 2016/17, the EU poultry meat sector faced one of the most severe Avian Influenza crisis in history. In addition to the losses due to the infection and the culling of millions of birds, the closing of the borders of trade partners has caused huge economic losses for all operators in the poultry meat chain. Some importing third countries are clearly using SPS issues as a tool to protect their market, adopting practices that are going completely against international standards and very firm stances at high political level are necessary to prevent these abuses.

Lastly, **a.v.e.c.** and the EU poultry meat producers are committed to keep EU consumer confidence in our products. Therefore, we fully support the EU farm to fork principle although it is costly. But to be able to keep poultry meat production in the EU, we need fair competition.

European poultry meat is probably the best poultry meat in the world. Enjoy – it´s from Europe!

Paul Lopez
President

Birthe Steenberg
Secretary General


“European poultry meat industry challenged to balance demands of European citizens and its competitive power on the global market”

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 the 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 has been based in Brussels. The office is managed by Birthe Steenberg who has replaced Cees Vermeeren in April 2017 as Secretary General of **a.v.e.c.**
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. He was re-elected for a second term in the General Assembly in Lisbon in September 2016.
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. In September 2016 the General Assembly in Lisbon reappointed the vice-presidents Piotr Kulikowski from KRD (Poland), Paul-Heinz Wesjohann from BVG (Germany), Philip Wilkinson from BPC (UK) while Mario Veronesi from Unaitalia (Italy) was elected for the first time.

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.

a.v.e.c. has Working Groups on the following issues:

- Trade/promotion
- Animal health/animal welfare
- Food safety/poultry meat inspection/food quality
- 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

avec

Pro Pollo

AMACO

NEPLUVI

una italia

UNIONE NAZIONALE FILIERE AGROALIMENTARI CARNI E UOVA

QGV

ÖSTERREICHISCHE QUALITÄTSGEFLÜGELVEREINIGUNG

CIDEF

COMITÉ INTERPROFESSIONNEL DE LA DINDE FRANÇAISE

SVENSK FÅGEL

VIP - BELGIE

bpc

FIA

ETL

BVG

KRD IG

KRAJOWA RADA DROBIARSTWA IZBA GOSPODARCZA

BTT

Baromfi Termék Tanács

Uniunea Crescătorilor de Păsări din România

UCPR

ancave

EU AND INTERNATIONAL KEY PARTNERS

a.v.e.c. cooperates with many other international organisations depending on the issues at 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 is 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 22 Country Members and 49 Associate Members, subdivided in producers/processors (22), suppliers (20) 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: 2300 West Park Place Boulevard - Stone Mountain - Georgia - USA
- 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

- 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
- Cartagena, 2017
- Banff, 2017

IPC Adopts Position Statement on Antimicrobial Usage

In its position paper called "Position Statement on Antimicrobial Use and Antimicrobial Stewardship Principles", International Poultry Council has adopted a position statement on the responsible and efficacious use of antimicrobials in global poultry production.

IPC recognizes the importance of collaborative efforts to address antimicrobial resistance. Within this document IPC recognizes their responsibility and role, identifies their mission and outlines their core principles. The adoption of the antimicrobial position and use stewardship was done with a spirit to actively engage with intergovernmental organizations, governments and stakeholders to help shape public policy to address antimicrobial resistance.

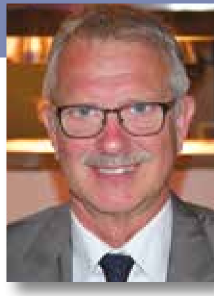
The statement sets a science-based course for the global poultry industry to follow that safeguards the efficacy of antimicrobial usage while at the same time addressing the issues of resistance, bird welfare, food safety, and concerns of consumers.

The IPC also recognizes the ethical obligation of farmers and their veterinarians to protect the health and welfare of the birds in their care, which may include the responsible use of antimicrobials. They emphasized that the poultry supply chain globally has a responsibility to ensure that it minimizes the industry's potential contribution to the development of antimicrobial resistance.

a.v.e.c. FOCUS

This section gives an overview of the main themes **a.v.e.c.** has worked on during 2016-2017. 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.

VISION OF THE EU POULTRYMEAT SECTOR: Interview of Cees Vermeeren, former Secretary General of a.v.e.c., who retired in May 2017



Cees Vermeeren
Secretary General of a.v.e.c.
who retired in May 2017

Short Biography of Cees Vermeeren

Cees Vermeeren started his career in the poultry and egg sector in 1975 and this has given him a broad insight in the poultry business. He has successively served a poultry breeding company, a hatchery company for laying hens, the Dutch Ministry of Agriculture, the Dutch Product Board for Poultry and Eggs and the association NEPLUVI, being a member of **a.v.e.c**.

He started his job in **a.v.e.c.** in 2005. Being also Secretary General of ELPHA (European Live Poultry and Hatching Egg Association), he has been in a role to promote and defend the common and specific interests of the European poultry sector towards the European Institutions in a balanced way.

You have been working in the poultry meat industry all along your career. What has been the main evolution(s) of the industry and what are the specificities of the poultry meat sector compared to other meat sectors?

Coming from a Dutch farm that changed from a mixed farm with diary, pigs and poultry into a specialised farm with layers, is an example of the evolution that has happened globally. Poultry has become a specialised farm activity as part of a well organised production chain of either poultry or eggs, while at the same time we still find many back yard poultry.

The poultry sector has been a frontrunner in the global exchange of knowledge, experience and technology that has become the standard for the other livestock sectors. This may explain why several poultry breeders are also active in the selection and crossing of other animal types.

I have been privileged that my career started in a breeding company. That brought me the knowledge of the different challenges in the selection and crossing of both egg and meat lines in poultry. The characteristics of slaughtered poultry and the meat thereof starts with the breeders and the other partners in the chain (feed manufacturers, parent stock farmers, hatcheries, poultry farmers). Those are determining how the slaughterhouses and processing plants may create the products that will reach the consumers by the retailers. The mutual dependency explains the high level of integration and cooperation which did concur with an increased farm size and mergers in other parts of the chain. This interconnection is common sense and essential for efficient production to respond to demands from society and consumers, which more than ever are driving the production chains and guiding and determining the future of individual producers.

But the stage of the trend and process differs in the EU-28 and globally within and between the different livestock sectors.

Using the technological developments in a broad-minded way has created the image and idea of the poultry industry. Unfortunately not everybody is recognising or willing to accept that animals, as sentient beings, are also benefiting from this.

What are, in your opinion, the main challenges that the sector will have to face in the upcoming years?

Given the continuing public attention to the impact of the consumption not only of meat but of all animal products, the consumption of meat in the EU will be under pressure and rather decrease than increase. Nevertheless, the poultry business may successfully maintain the present level of consumption or even increase it a little bit, benefiting from the specific characteristics of poultry meat compared to other types of meat. Consumer confidence in poultry meat will be a prerequisite for such success. The challenge is to deal with the complexity of this confidence that is linked to many different aspects and criteria, for which does not exist a common or uniform balance. However the confidence that eating poultry meat is safe is the most critical. So it is essential that the poultry industry will successfully manage and control the risks of Campylobacter, the use of antibiotics and avian influenza. These are of both private and public interest, but they are not the only elements.

It may help that precision livestock farming will become more sophisticated and bring more data and information for better management and control. The question is how and which data and information the different operators in the poultry supply chain are prepared to share with each other in the common interest and what will remain in the competitive domain.

The transfer of information to the society, citizens and politicians who are all consumers, needs more than ever to be organized by smart communication. The promotion of a world poultry day by the Hungarian member is a good initiative, but communication should be a continuous activity.

To what extend do you think it is possible to balance the increasing demands of citizens/authorities and the competitive power of the poultry meat industry on the global market? Is there a threat that these demands will jeopardize the possibility to produce conventional poultry meat in the EU in the longer term?

The countries in the EU-28 territory will remain the home market of European producers. The demands of citizens and authorities in the EU Member States depend on different attributes as income level, culture and region and are not indisputable. But they are also linked to, for example, the animal (welfare and health), the environment

(efficient use of natural resources, emissions) and public health (safety and nutritional value) that are part of the comprehensive idea of sustainability and partly mutually conflicting. The conventional production in the EU will continue to differentiate the farming and housing systems and breeds used. The poultry industry has shown already the capacity to respond to the partly mutually conflicting demands and requests by product differentiation and market segmentation. European consumers prefer the white boneless poultry meat, but the carcass valuation by a higher price for this meat is limited by the very competitive price of imported boneless white meat. Moreover, on the global market, European producers are challenged by their competitors who may offer poultry meat at lower prices, since the cost price of poultry meat in the EU is higher.
At the same time, we see that the citizens and consumers in countries outside the EU are putting the producers under pressure to pay more attention to attributes that are already part of the cost price in the EU. This will bring opportunities for European producers. The question is how long this may take and if the feared threat will be more serious than the disturbing threats in the past we have dealt with.

How do you assess the added value of a.v.e.c. in the representation of the interests of the European poultry industry?

a.v.e.c. is the strongest European organisation for the promotion and defence of the interests of the operators in the European poultry meat production chain, since the high integration of the poultry meat chain is guiding its positions. But the support of the individual members within **a.v.e.c.** and in the EU Member States is essential and indispensable. The image of a.v.e.c. is built by its deliberate common positions and ideas and the support of its members to transfer them to their members and authorities. And it is crucial that **a.v.e.c.** is consistent in promoting and defending its principles and positions. The added value of **a.v.e.c.** may be increased if the members would be willing to cooperate and support a common communication program that will be the starting point for the tailor made communication in the individual Member States. The needed investment in capacity, knowledge and experience will be earned back.

In 2020, global poultry meat consumption will overcome global pork consumption. What, in your opinion, makes poultry the meat of the future?

Poultry is already the meat of today with a bright future for several obvious reasons that are highlighted in communications, presentations and advertisements. Poultry has the advantage that it requires fewer natural resources in its production than all other livestock species, which makes it available for consumers at affordable price. In addition it does not suffer from religious restrictions. Poultry is considered a healthy low fat meat and it is accessible, convenient, versatile, easy to use and prepare, and its taste is universally accepted.
By constant innovation, new products are regularly launched, which keeps consumers attracted and interested to buy poultry meat without boring them.
That is why globally the future of poultry meat is looking bright, but that does not allow the poultry industry to recline and rest.

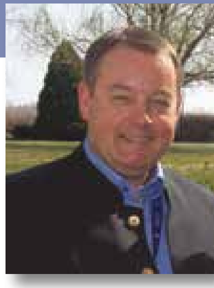
You have always been defending the European spirit and always advocate that sharing information is better than being protective. Despite the election of D. Trump in the US and the Brexit, do you still believe in the European idea and are you optimistic for the future of the European Union?

We are in an exciting time and the uncertainty and dissatisfaction of citizens is used for national protectionism.
But this will not be the solution since globalisation is irreversible. Creating more awareness and understanding of the opportunities of globalisation will help citizens more than aggravating the uncertainty.
The future of the idea and principle of the European Union looks to be at stake. The Brexit process has already paralysed too much which should not be permitted. After all, Brexit will force the officials and politicians at long last to fix the things that are not working in the European Union and to show the citizens the benefits of the European Union. The mix of cultural diversity in the EU is an asset that is worth to be strongly defended.

At last, which message would you like to address to the poultry meat industry and people who will be reading this Annual Report?

The principle of the internal market needs to be defended in the public domain and mandatory public legal requirements should be set only at European level. Competition within the sector may be guided in the private domain only, but a European legal framework might help to prevent conflict with the internal market principle. The authority of Member States can regulate in national legislation on issues in the area of, for example, food safety, public health, animal health/welfare and origin. Going beyond European requirements should be considered very critically since it may easily undermine the credibility and complicate the possibility to convince third countries to accept products from the individual EU Member States in the same way the EU is accepting their products.

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



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

The Working Group held up till June 2017 three meetings and invited several experts from the European Commission.

Avian Influenza - 2016 to 2017

This year's epidemic of HPAI H5N8 saw over 1000 confirmed outbreaks in poultry and wild birds in Europe and worldwide. Avian influenza (AI) poses a serious threat for the poultry sector and still has the potential to heavily impact both the animal health status and production in Europe. In the last year, there have been multiple cases of AI of wild bird origin occurring in nearly all countries in the EU. This has had a crucial impact on the export of poultry meat from these countries to third countries.

To this end, **a.v.e.c. is continuing to ensure effective and proactive cooperation and liaison with the European Institutions and national stakeholders.**

The current avian flu epidemic is the most severe and longest-lasting epidemic that has occurred in Europe so far. In total, 29 European states have been or still are concerned.

In addition to H5N8, two other HPAI subtypes have been detected in Europe, i.e. HPAI H5N5 (in seven states) and H5N6 (in Greece). Outside Europe, avian influenza outbreaks of the subtype HPAI H5N8 have been reported in Russia, Israel, Egypt, Tunisia, South Africa, Zimbabwe, Dem Rep of Congo, Nigeria, Uganda, Cameroon, Iran, Nepal, and India. HPAI H5N1 is endemic in Asia and some African countries. Moreover, further HPAI H5N1 related H5-strains are circulating in Asia[1].

Although the current epidemic seems to be waning, isolated outbreaks may still occur. The recent reports of HPAI cases in birds kept in captivity, which occurred in May 2017, indicate that at least in some countries infectious virus is still circulating in the environment.

Therefore, biosecurity measures should be maintained. This includes, inter alia, wearing of farm/poultry house specific protective clothing and footwear, cleaning and disinfection of equipment that has been in contact with birds and the best possible separation of poultry and wild birds.

So far and worldwide, none of the HPAI subtypes circulating in Europe (H5N8, H5N5, and H5N6) have caused infections in humans.

a.v.e.c. in coordination with IPC (International poultry council) recently called OIE to revise the Chapter of the TAHC (Terrestrial Animal Health Code) on the infection of Avian Influenza.

We suggest that OIE reporting requirements for notification and publication of the different categories of infections should make clearer the very different actions that importing countries should consider in response to the different types of outbreaks and the different risk profiles of outbreaks in backyard flocks and commercial flocks.

Similarly we call for a reassessment of the concept of zone freedom from avian influenza and to restart the application of risk-based health measures to allow the movement of poultry commodities from free zones.

a.v.e.c. and IPC propose that restrictions on trade should be based on principles of risk analysis and that importing countries should be required to demonstrate that their interventions are supported by proper assessment of the risks from the outbreak incidents notified.

This review should also consider the procedures and timelines relating to cleaning and disinfection and subsequent surveillance of infected premises to ensure that they are appropriate and reflect current scientific knowledge and do not unnecessarily delay the resumption of exports from the country or zone affected.

[1] Qualitative Risikobewertung zur Einschleppung sowie zum Auftreten von hochpathogenem aviären Influenzavirus H5 in Hausgeflügelbestände in Deutschland - https://www.fli.de/fileadmin/FLI/Publikationen/Risikobewertungen/HPAIV_Risikobewertung_2017-05-17.pdf

Animal Health Law

The new animal health law was adopted this year and implementing and delegated acts will follow. **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 enforcement.

Use of antimicrobials

In June 2017 the European Commission adopted a new Action Plan to tackle Antimicrobial Resistance (AMR) that builds on efforts to address the emergence and spread of drug-resistant pathogens in humans, animals, and the environment. In parallel, the Commission adopted the first deliverable of the plan: EU Guidelines on the prudent use of antimicrobials in human health.
«The Commission will concentrate on key areas with the highest added value for member states, while respecting the limits of EU competence and bearing in mind that member states remain primarily responsible for the definition of their health policies» the plan states.
The workings group on animal health and welfare has reinforced its cooperation with DG SANTE (Unit E5 Animal nutrition and veterinary medicines) on the current and future activities regarding Antimicrobial Resistance.
So far the implementation of national action plans has varied across EU member states, therefore the new Action Plan will provide additional support tailored to individual member states to better enable the development and implementation of national plans.

In General, a.v.e.c. welcomes the new EU action plan and remains highly committed to assuring the food safety of its products to European consumers while sharing the principles identified by the European Platform for Responsible Use of Medicines in Animals - EPRUMA[1].

a.v.e.c. warmly welcomes the improved EU International cooperation with other countries and organisations which will ensure a robust governance by taking a more holistic approach to AMR.
It is vital that the European Commission continues to have a strong collaboration with international organisations such as WHO, FAO and OIE considering the global nature of AMR.
With this in mind the European poultry industry advocates identical conditions and standards for products from third countries entering the EU to ensure fair trade and high safety and quality to the consumers.

Workshop on Responsible Use of Veterinary Medicines

On the 13 October 2016, EPRUMA and the Slovak Presidency of the EU held a workshop to create a common understanding on the responsible use of veterinary medicines in the EU.
The programme showcased concrete examples on how public authorities and stakeholders in Belgium, France, the Netherlands, Spain and the United Kingdom are implementing best practices on the use of veterinary medicines, including antibiotics.

EC Workshop with EMA (European Medicines Agency): Data collection on consumption of veterinary antimicrobials in Europe – achievements, challenges and way forward

DG SANTE organised a workshop with EMA on 26 April 2017 to bring together all relevant parties to expose the benefits of collecting data on antimicrobial consumption (sales and use per species), and to discuss the implementation at national level of schemes for collection of those data, including collection at farm level. The workshop was also intended to provide a technical input to the Commission and EMA with a view of proposed new legal provisions.
Discussions were mainly focused on future steps in data collection on consumption of veterinary antimicrobials, in particular on the recently published draft EMA guidance on data collection by animal species.
Overall, the workshop has successfully gathered the preliminary views on future steps in data collection on consumption of veterinary antimicrobials. Final formal views on the recently published draft EMA guidance on data collection by animal species are expected to be received by EMA during the public consultation period which will expire on 24 September 2017.

In a.v.e.c.'s experience the harmonised interpretation and implementation of EU legislation is a real challenge and therefore we strongly support the Commission actions and initiatives taken so far.

IPC Adopts Position Statement on Antimicrobial Usage

In a landmark decision, the International Poultry Council has adopted a position statement on the responsible and efficacious use of antimicrobials in global poultry production.

The IPC acknowledges antimicrobial resistance is a global concern and that the poultry industry must adopt management practices that reduce the use of those antimicrobials for which resistance could pose the greatest global risk.
All participants in the poultry industry adopt risk analysis based principles of antimicrobial stewardship to ensure best practices are used throughout all phases of poultry production so as to minimize the use of all antimicrobials while ensuring proper animal care.

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

The Animal Transport Guidelines Project

The EC project called 'Transport Guidelines' responded to an European Parliament and Commission call and its aims were to develop Guides providing good and better practice for animals transported within Europe and to third countries for slaughter, fattening and breeding. The Project is focusing only on road transport.

Guides have been developed for cattle, horses, pigs, poultry and sheep transport. The project started in May 2015 and will finish by the end of 2018 and includes the carrying out different dissemination activities in order to enhance a uniform level of implementation of the existing Council Regulation (EC) No 1/2005[2].

The Institute Technique de Aviculture (ITAVI) and The Hellenic Agricultural Organization "Demeter" were in charge of drafting the poultry chapter. The guidelines provide example of which are the" good transport practices" available in Europe and give examples of some better practices going beyond the current Legislation, without defining the legal interpretation of the Regulation in force.

From the very beginning a dedicated a.v.e.c. group of poultry experts worked in coordination with the scientific team and together with other relevant stakeholders. a.v.e.c. have been strongly committed to providing useful and practical inputs throughout g the drafting process.

European Animal welfare platform launched by the European Commission

In June 2017 Vytenis Andriukaitis, the EU Commissioner for Health and Food Safety launched the European animal welfare platform highlighting in his opening speech the three overall objectives of this exercise: The better application of EU rules on animal welfare, strengthen the voluntary but concrete commitments by businesses on the ground and find the best ways to promote our EU animal welfare standards as a competitive advantage in Europe and on global markets.

a.v.e.c. participated to the inaugural meeting of the Platform and we are strongly committed to cooperate and assist the Commission in improving the quality and sustainability of the existing livestock system.

Nevertheless a.v.e.c. wants to express a concern regarding the possibility that the introduction of higher animal welfare standards will lead to higher costs for the food business operators, market imbalance and further loss of harmonisation. Hence in the dialogue with consumers, the Commission must stress the already high standards applied in EU animal production and prepare consumers for the higher costs of better standards.

Regulation 1099/2009 on the protection of animals at time of killing

The Commission has launched a study on preparation of best practices on the protection of animals at the time of killing. The purpose of the study is to collect information on best practices intended to serve as a technical toolbox assisting business operators and competent authorities in implementing the EU legislation. Technical documents developed under this study will contain various options on how some requirements can be met based on the current scientific evidence and good commercial practices. They will not represent a position of the Commission on the interpretation of EU law and will not have any legal binding authority.

For a.v.e.c. it is fundamental that, whatever method of slaughter is adopted the welfare of the bird is protected when complying with the European Legislation. a.v.e.c. believes that regulating the stunning for religious slaughter is a highly complex issue that must be approached with sensitivity.

[2] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32005R0001

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

Richard Griffiths,
Chair of the Working Group
on food safety and food quality

Introduction

The Food Safety & Food Quality Working Group has had a very busy year, with members contributing to work that will benefit the poultry meat sector for years to come.

Poultry meat is increasing in popularity with consumers, and a.v.e.c. members are determined to carry on delivering safe, wholesome, and nutritious products.

We are facing several challenges, both politically such as the impact of Brexit, and technically with the continuing saga of what is MSM. What is clear is that to carry on producing food our consumers trust, the European poultry meat sector must meet the challenges head-on and defend the standards and values that we hold close.

a.v.e.c. has been working closely with the Commission and has managed to build relationships with new officials, and brief them on our key issues.

Campylobacter

2017 has seen the Process Hygiene Criteria for campylobacter finalised. **a.v.e.c.** has campaigned hard for a PHC that is fair to all members, and we have achieved that through the three-step transitional period ending in 2025.

There has been an increasing political interest in campylobacter and we felt that any PHC was only going to get stricter, so it was best to agree the opening level (20/50 samples at over 1000cfu/g) and work to influence the Commission on solutions.

As has been found in several Member States, there is no easy or single option for reducing campylobacter. **a.v.e.c.** is committed to sharing best practice amongst members, as we know that only a whole chain approach will make a meaningful impact.

We will continue to engage with the Commission on campylobacter reduction strategies, and to encourage more focus on delivering kitchen hygiene information to consumers.

MSM

MSM and mechanical deboning have continued to be discussed at length, but with no conclusion yet in sight. The UK courts have finally returned to the ECJ judgement on what is MSM, but this has left us where we were two years ago and with some additional terminology to wrestle with.

a.v.e.c. maintains the position that certain portions, such as wishbones, do not meet the existing definition of MSM, and should not be considered as such.

In the beginning of 2017, the Commission visited a plant in Germany to see the production of meat from wishbones. We were encouraged that the officials seemed to appreciate the **a.v.e.c.** position having seen the operation. The Commission is now considering its position with regard to the existing definition of MSM, and whether any changes or additions would be appropriate given the advances on technology since the legislation was laid down.

We are waiting for the Commission's deliberations before deciding on continuing the push for a recognised standard on extent of comminution of chicken meat. Last year we successfully led the creation of CEN Workshop Agreement, setting out a methodology for assessing comminuted and fragmented chicken meat (arising out of the MACSYS project).
The next step would be to turn this into a fully-fledged CEN Standard.

Meat Inspection & Official Controls

Our push for a review of the meat inspection regime for poultry meat has been slowed by the Commission's review of Official Controls. This review is now nearing completion, and although there is little change expected to detail of the fundamental legislation, we are hopeful that we can re-start discussions in 2018.

The a.v.e.c. position remains that visual inspection of poultry meat serves no food safety or public health purpose and should therefore not be an Official Control.
We want to see a move to microbiological audit as the main Official Control. We feel this would reflect the risks in the production chain, particularly given the profile the Commission has given to campylobacter this year.

QUALITY - SUSTAINABLE PRODUCTION

European legislation lays down stringent requirements guaranteeing the quality of products, and defines common minimum rules for all Member States, thus allowing a better functioning of the single market.

ORIGIN LABELLING

Labelling of fresh poultry meat:

Since 1st of April 2015, the mandatory labelling of the place of rearing and slaughter for fresh poultry meat has applied in the EU. The labels must indicate the name of the Member State for both steps and "third country" in the case that animals are reared and/or slaughtered outside the EU. The rules have been implemented without major issues within the different Member States.

Labelling of meat used as an ingredient

While the legislation on labelling of the fresh poultry meat has been applied for two years, the discussion on the labelling of the meat used as an ingredient is still ongoing. The European Parliament has voted several non-binding resolutions[1] inviting the European Commission to come up with legislative proposals for mandatory country origin labelling of certain foods, such as milk, dairy and meat products.

However, the Commission has been reluctant to act on this issue, citing the cost of this measure for the operators and the lack of willingness of the consumers to pay for these additional costs.

National initiatives

France, Italy, Lithuania, Portugal, Romania, Greece, Finland and Spain have made a request to the Commission to apply country of origin labelling for certain types of food products, such as milk, dairy products or meat used as ingredients.

The Commission has already accepted the request from France, Italy, Portugal and Lithuania, as they are limited in time, and include a mutual recognition clause with "EU" or "non-EU" labels. Member States have agreed to present a report on the impact of these schemes on the internal market to the Commission.

In particular, France has started a two-year trial scheme on January 1 2017 and will last until 31st December 2018 with the objective to assess whether consumers are willing to pay more for the indication of certain origins. The scheme requires the labelling of the products containing more than 8 percent meat indicating the place of origin, raising and slaughter of the animals, which have been used in the preparation.

Greece, Finland, Lithuania and Portugal aim at obtaining the agreement of the Commission to start similar projects.

a.v.e.c. position:

Today, 25 % of the breast meat consumed in the EU is imported from third countries (mainly Brazil, Thailand and Ukraine). This meat is mainly 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. 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 all along the food chain.

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 marketing standards have been designed to harmonise the internal market, to improve the quality of the products and to protect the consumers.

For poultry meat they are laid down in the Commission Regulation (EC) No 543/2008 of 16 June 2008 containing detailed rules for the application of Council Regulation (EC) No 1234/2007. In particular they are fixing the parameters for:

- monitoring water content
- labelling of different methods of production.

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

The Commission has just started the process of reviewing these marketing standards and will launch a horizontal evaluation of all EU marketing standards. This evaluation study is included in the DG AGRI Evaluation and Studies Plan for 2017-21:
https://ec.europa.eu/agriculture/sites/agriculture/files/evaluation/plan_en.pdf
This study should start at the beginning of 2018 while the results can be expected end of 2018/beginning 2019. The study itself is to be carried out by an external contractor.
a.v.e.c. has asked the Commission to include the poultry meat sector in the sectors that will be assessed in this study and the Commission has indicated that they have a strong interest to cover it in this evaluation.
In conclusion, a legislative proposal for a full-fledged review of marketing standards cannot be expected any time soon, as the evaluation may still need to be completed by an impact assessment.

a.v.e.c. is working internally to prepare this revision and is ready to collaborate with the contractor for the realization of this study.
In general, **a.v.e.c.** believes that our sector has attributes that require specific legislation and is therefore opposed to a general legal framework defining the basic requirements for all animal species.
In addition the inclusion of a new system of mandatory information about the farming system based on the egg labelling system is not seen as an added value, since consumers that are looking for specific products are familiar with today's existing voluntary labels.
Lastly, the future marketing standards should facilitate the introduction of new technologies that may improve the safety and quality of poultry meat while allowing consumers to make informed choices.

ORGANIC FARMING

After Commission's proposal in 2014 to revise the regulation on organic production, there has been a long and intense period of discussion between the 3 institutions (Commission, European Parliament and European Council) to try to find a compromise. Finally in June 2017, the Maltese Presidency and the European Parliament have concluded a preliminary agreement on a revision of the existing EU rules on organic farming. After thorough legal and technical revision of the text and formal endorsement by the Council, the new legislation will be submitted to the European Parliament for a vote at first reading and to the Council for final adoption. The new regulation is expected to apply from 1st of July 2020.
An important part of the detailed rules of production (stocking rate, size limits of flocks,...) will still have to be defined in implementing acts which will be discussed in the second half of 2017 by the European Commission with the representatives of Member States.
a.v.e.c. will closely follow this process to make sure that the interests of the EU producers are preserved.

ENVIRONMENT/SUSTAINABLE PRODUCTION

Sustainability of the poultry meat production:

Poultry meat has the best feed conversion ratio of the different meat species and has therefore lower emission levels to the environment. Despite these advantages, our sector is working to increase the efficiency of the production to address the challenge of the climate change.
a.v.e.c. is in the opinion that when implementing new environmental policies, all aspects of sustainability, - economic, social and environmental - have to be taken into consideration to guarantee the viability of the business.

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.** in coordination with CLITRAVI, has sent its comments to the first version of the revision of the BREF Food, Drink and Milk which deals in particular with the further processing of the meat for the poultry meat sector.
In addition, a.v.e.c. will follow with very close attention the revision of the BREF for slaughterhouses, which is expected to take place not before the end of 2017 - beginning of 2018. The **a.v.e.c.** Working Group has already produced some comments but will reconvene as soon as the official date of the start of the revision will be announced.
In this revision, the Commission should aim at achieving a good level of protection of the environment, respecting economically and technically viable conditions while permitting a certain level of flexibility to respect the differences of the conditions of production across Europe.

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 2017
by Yann Brice, chair of the Turkey Working Group

Turkey production in Europe remains concentrated in six Member States (Germany, France, Poland, Italy, Spain and the United Kingdom). With nearly 1,9 thousand tonnes, they account for almost 88% of European production.

Market situation for turkey meat

Turkey production increased sharply in 2016 in the EU (+ 6.8%), driven by Poland (+ 17.9%), Germany (+ 3.3%), Italy (+5,4%), France (+5,1%) and Spain (+18,7%), but marked by a slowdown in UK production (-6,2%). The situation in 2017 is likely to reverse with an expected decline in European production, a direct consequence of the influenza crisis that occurred at the end of 2016 with the culling of many flocks.

The question of the competitiveness of turkey meat with chicken and other meats persists, and the favourable poultry consumption situation (24 kg per inhabitant per year projected in 2025 FAO-OECD) is to the detriment of turkey (which is 3.8 kg per inhabitant and per year in 2016, source Marktinfo Eier & Geflügel). Industry must act to regain markets and consumers by innovating and optimizing their material balance.

2016 was marked by favorable indicators, notably thanks to stable commodity prices. However, industry is cautious as turkey production is more sensitive to price changes than other livestock products especially those of soybeans.

Europe is under pressure from international supply (Brazil, USA and Thailand) and imports more value-added products than it exports (its 2016 trade balance in poultry products is in deficit of 590 million €). Confidence in the future, innovation and investment are needed to revive our production.

Impact of Brexit on Turkey

Speculating on conclusions about the exit negotiations of the UK from the European Union is premature. However, considering that the European Union is the UK's largest economic partner, the consequences of the hard or soft Brexit will inevitably have an impact on our poultry and turkey markets.

Today the EU imports 878 734 T of poultry meat through Tariff rates quotas from Third Countries. In this total, turkey meat TRQs represent a total of 123 162 T and the decision on the reallocation (or not) of these quotas between UK and EU27 after BREXIT will inevitably have consequences on the EU turkey meat sector.

a.v.e.c. is in the opinion, in accordance with its UK member BPC, that when it comes to trade flow the status quo should be maintained and trade flows should be kept as they are.

Histomonosis

This disease poses a permanent and serious threat to the health and welfare of animals in the EU and at a global level. A technical meeting of EFSA on histomonosis in 2013 concluded that coordinated assistance from all stakeholders was needed to help mitigate animal suffering and to seek appropriate control measures. For decades, histomonosis was controlled by effective drugs for prophylaxis and therapy. But in recent years, these drugs have been banned or withdrawn from the market, which has resulted in an increased number of untreatable epidemics, worsening animal welfare and considerable economic losses for livestock farmers and businesses.

The University of Vienna, in partnership with **a.v.e.c.**, has taken the initiative to put together a European histomonosis case-finding form (blackheaddisease.info) to consolidate a database that will prove very useful for field people, scientists and public institutions in their fight against this disease. If everyone (veterinarians, poultry farmers, companies, etc.) is actively involved, his interest will be quickly tested.

Vigilance against avian influenza

The threat of an epidemic of avian influenza continues to weigh on the EU. Unfortunately, the dramatic crisis experienced by the vast majority of European producers in 2016 may repeat if we do not react collectively. Protection and surveillance measures have been effective in limiting the spread of the disease, but have not been sufficient to keep most of our export markets.

We will not prevent wildlife from flying, so it seems important to us that the work undertaken by the OIE (World Organisation for Animal Health) to change the status of low pathogens rapidly leads to the collective European interest.

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 a balanced and fair trade for the EU poultry sector

The Working Group on Trade and Promotion is currently made up of expert representatives from ten 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 Egelmeers (NL), Philip Eeckman (BE), György Endrödi (HU), Gunter Zengerling (DE), Lukasz Dominiak (PL), Jean-Charles Doux (FR), Paul Lopez, (FR and a.v.e.c. President), Alberto Redondo Cardeña (ES), Nicoló Cinotti (IT) and Richard Griffiths (UK).

The objective of the Working Group is to support and update the Board on trade issues and to work in close cooperation with the secretariat on trade policy issues towards third parties in order to defend the interest of the EU Poultry sector.

The Working Group covers all trade and promotion 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.

Main trade priorities in 2016-17

During the past year the Working Group has been engaged in a large number of trade policy issues of both offensive and defensive interest for the EU poultry industry. Additionally, the EU poultry production and growing export has been significantly hidden and challenged since late fall 2016 by trade restrictions in the main export destinations caused by an increasingly number of outbreaks of HPAI. Members have been faced with third countries' policy on e.g. regionalization, zoning and import quarantine periods that are not in compliance with the OIE recommendations.

Active participation in dialogue with the EU Commission on the Free Trade Negotiation with third countries is an important task in defending the Members interest. A comprehensive transparency study was finalized comparing the legal framework and practices in EU and USA in the broiler production, but the election of D.Trump as President has, at least for a certain time, put the EU-USA free trade talks on hold. Another free trade negotiation with strong defensive interest for the EU poultry industry is Mercosur. **a.v.e.c.** is sincerely concerned if the EU poultry industry is paying a too high price for an overall ambitious trade deal in light of the significant market access for poultry meat already granted to Brazil.

The South Africa safeguard investigation against imports from the EU lead to a provisionally duty of 13.9 % in December 2016 on top of the existing antidumping duty imposed on imports from UK, Germany and the Netherlands. Several legal contributions have been delivered by a.v.e.c. to the investigating Authority in South Africa arguing that the measure is not in accordance with the Economic Partnership Agreement (EPA) between EU and South Africa implemented in October 2016. **a.v.e.c.** in close cooperation with the EU Commission has tried different political solutions but the South Africans seems determined to protect their vulnerable poultry industry against fair competition from imports. Imposition of definitive safeguard measure is supposed to run for 4 years with a yearly linear depreciation of the measure.

Following a trade panel case launched by China against the EU poultry quota allocation the WTO dispute settlement body has concluded that the EU did not take into account the Chinese interest in duck meat export when EU previously revised their TRQs. The WTO panel on the contrary found that the EU did not have to take into account the interest of the Chinese export when the tariff quota for chicken meat to Brazil was revised and increased in 2008. As a consequence of the WTO panel decision the EU will start negotiation with China to discuss an increased tariff quota of duck meat to EU.

a.v.e.c. has opposed main parts of the EU Commission proposal for a revision of the TRQ (tariff quota) management system to avoid a further concentration in EU of poultry meat import rights and thereby disturbing the market being partly controlled by predominantly large importers from the export destinations. **a.v.e.c.** defends a sound balance in the allocation of import licenses and tariff quotas to the benefit of the market transparency and the longer-term interest of the poultry industry.

The outlook for trade in poultry

The outlook for international trade in poultry meat is of concern as use of trade actions, and wish for self-sufficiency in production is on the rise. Globally, increased protectionism and technical barriers to trade are unfortunate policy tools.

In the framework of free trade agreements there is less focus on multilateral free trade agreements and even bilateral and regional agreements are under pressure. In the EU the effort to conclude a variety of free trade agreements has come under pressure as the European Court of Justice has ruled that national and regional parliaments must be involved in the ratification of trade agreements that include investment protection. This ruling has impact for the EU trade deal with Singapore since it needs the approval of

38 national and regional assemblies across the EU as well. The ruling sets a precedent for similar trade deals the EU aims to conclude with Japan, Mexico, Australia and not least the post-Brexit trade agreement.

One of the major post-Brexit tasks for **a.v.e.c.** in the coming years is to safeguard the interest of the EU poultry trade in the internal market as well as in a revision of the multilateral free trade agreements where EU has granted TRQs to especially Brazil and Thailand, being the huge exporters of poultry meat to EU and the UK. No doubt that the poultry industry is best served with a post-Brexit situation of no changes in the legal framework for poultry production or in the ordinary poultry trade between the trading partners.

The long-lasting outbreak of Avian Flu in part of the commercial and back yard poultry farms across Europe in 2016 and 2017 has had significant economic impact on the ordinary trade with trading partners in third countries. To avoid similar situations in case of future AI outbreaks in the EU it is of paramount importance for **a.v.e.c.** and its Members that OIE recommendations on zoning and regionalization are globally accepted and followed during the OIE recommended period of time before a country is free of Avian flu.

The issue of halal compliance in export to Muslim trading partners has become more dominant than ever. The possible new import control rules and halal standard in the GCC area (Gulf Countries) is a significant step in the direction of providing safe imported food but also strengthen the rules on accreditation of halal certifying bodies and the application of measures at the time of slaughtering animals and especially poultry. At this moment, the possible entry into force date and final conditions for exports is not fully transparent but a.v.e.c. is working on clarification and cooperation with the GCC authorities and other stakeholders in order to avoid new tight trade conditions becoming a technical barrier to trade.

With these trade issues in mind it has become even more important for a.v.e.c. Members to open new markets to meet the increasing competition on a global scale. **a.v.e.c.** hopes that its Members will take advantage of the EU Promotion Funding of export activities that is available after application and participate in the various Trade visits by the EU Agriculture Commissioner in the coming year to e.g. Middle East and Iran as planned.

The Working Group on Trade has a great interest in engaging all **a.v.e.c.** members to contribute actively to the work to 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

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

The EU poultry meat market: a very open market with a trade deficit
The EU imported almost 900.000 T of poultry meat in 2016. Although exports exceeded imports in quantity (1.615.691 T vs 899.183 T in 2016), in value, the EU had a trade deficit of more than 203 Million € in 2016 with an increase compared to 2015 (73 Million €). The main reason for it is 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).

A need for reciprocity in the trade relations
Today the EU is importing large quantities from Brazil and Thailand while the EU does not have any export opportunity in these countries. Therefore a.v.e.c. advocates that no additional quantity should be granted to these countries. In fact, additional quantitates should only be granted to countries that can offer reciprocal and complementary access to their market.

Importance of respect of similar standards from farm to fork:
When importing products from third countries, the respect of the high EU standards in terms of Animal Health, Animal Welfare, Food Safety and Environment all along the food chain is a prerequisite. Third countries should apply similar and not equivalent standards all along the food supply chain. The recent fraud case in Brazil has shown that the controls at the border on imported products are not sufficient to guarantee the quality and the safety of imported products and it should be reinforced. 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.

Importance of SPS issues in trade negotiations
The Commission should promote in all FTAs the recognition of the EU as a single and internal market. Regionalization and compartmentalization should also be at the heart of SPS negotiations since many third countries do not follow the OIE recommendations and use SPS issue as a trade barrier. The EU Commission should defend and promote the European farm to fork approach 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 be available also for conventional products and not focus solely on so called "quality products".

a.v.e.c. welcomes the efforts of DG AGRI Commissioner Phil Hogan to promote EU agricultural products through trade missions:

Since the beginning of his mandate, DG AGRI Commissioner Mr. Hogan has organized a number of high level trade missions in third countries, in order to help open doors for new exports and help developing trade relationships with some specific Third Countries. The next visit is scheduled on 7-12 November 2017 and will stop in Saudi Arabia and Iran. Several **a.v.e.c.** members have expressed interest in participating to this mission.

a.v.e.c. very much welcomes the initiative of Mr. Hogan and will always encourages its members to participate and support Mr. Hogan's efforts to develop EU exports.

Impact of Brexit

The outcome of the UK Referendum on 23rd June 2016 to leave the European Union has led to a period of great uncertainty. It is today very difficult to predict what might be the outcome of the negotiations at the end of March 2019. **a.v.e.c.** is in agreement with its UK member BPC, that when it comes to trade, everything should be done to maintain the status quo and make sure that the current trade flows are preserved.

The discussions are still at an early stage and are focusing on citizen rights, while the question of the trade relationship between UK and the EU 27 should not be discussed before the end of the year 2017.

The UK Referendum does show that it is opportune to consider in existing and future trade agreements the possible consequences for e.g. the market access conditions in case a Member State is leaving the European Union as is happening in 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

CETA has been approved by EU Council, EU Parliament and Canadian Parliament and will enter into force provisionally on 21 September 2017 but the date is not yet confirmed. Poultry meat lines have been almost entirely excluded from this agreement.

UNITED STATES

Fifteen rounds have taken place since the launch of the negotiations in July 2013, the latest one during the first week of October 2016. However the TTIP negotiations are now effectively on hold following Donald Trump's election as the new US administration is still in the process of defining its trade policy.

MERCOSUR

The last negotiating round was held on the week starting on the 3rd of July 2017 in Brussels. There is a clear and declared ambition by the Commission to finalise the agreement by the end of the year 2017.

There has already been an agreement on a number of key issues across the various chapters such as trade in goods, services, public procurement or food safety standards.

The next negotiation round will be held in Brasilia from October 2 to 6 2017 where both sides are expected to put new market access offers on the table during this round. 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) with no reciprocal access. Unofficial sources suggest that the Commission has been offering a total of 78 000t (cwe). This quantity cannot be accepted by our sector. The recent fraud and corruption scandal in Brazil and the discovery of contaminated poultry meat in recent analysis from the EU, should encourage COM to be prudent in these negotiations. Finally, knowing the uncertainty of the BREXIT, negotiations especially on the allocation of the existing quotas, **a.v.e.c.** advocates that no additional concessions should be negotiated with Mercosur until the BREXIT issue has been solved.

MEXICO

The EU and Mexico met in Brussels in June 2016 to start the negotiation process for the modernisation of the EU-Mexico Global Agreement. The fourth negotiating round took place in Mexico City between 26 and 30 June 2017. The Commission explained that they are very ambitious on this agreement and expect to conclude it by the end of the year.

The US are supplying 98 % of the current Mexican imports of poultry meat with 0 tariff under NAFTA agreement. **a.v.e.c.** has an interest in accessing Mexican market and is looking for a reduction of the tariffs applying on exports to Mexico which are currently very high.

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 13th round of negotiations took place in Beijing on the week of 15 May 2017.

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

In 2015, China initiated a complaint at WTO on the tariff rate quotas that the EU agreed with Brazil and Thailand in 2006. China deemed the TRQ agreements were in conflict with WTO rules arguing that its interests were not been taken into account sufficiently, due to veterinary restrictions when historical rights have been calculated.

On March 28, 2017, the panel rejected all China's complaints on chicken meat but concluded that the EU has not followed the right procedure when attributing a TRQ to Thailand on 2 cooked duck tariff lines: 1602 39 29 and 1602 39 85.

On 16 May 2017, the European Union informed the Dispute Settlement Body (DSB) that it intended to implement the DSB's recommendations and rulings in a manner that respects its WTO obligations and that it would need a reasonable period of time to do so. **a.v.e.c.** welcomes the decision of the panel on chicken aspects while working closely with the Commission to find an outcome on the duck part of the complaint, which is satisfactory for all parties.

INDIA

German Chancellor Angela Merkel said that she has the ambition to push hard to revive and accelerate trade negotiations with India, which are on hold since 2013. Poultry meat is considered as sensitive products for India.

INDONESIA

The Council gave the Commission the green light to start negotiations for an FTA with Indonesia on 18 July 2016. The first round of negotiations took place on 20 and 21 September 2016. The second round of negotiations was held from 24 to 27 January in Indonesia. The next round of negotiations is likely to take place in September 2017 – with preparatory inter-sessional work in between.

Halal issue might be the main blocking point in these negotiations for the poultry meat sector.

PHILIPPINES

Negotiations for a FTA with the Philippines were formally launched on 22 December 2015. The first round of negotiations took place on 23-27 May 2016 in Brussels and the second round was held on 13-17 February 2017 in Cebu City (Philippines). No date has been set yet for the next round of negotiations.

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 1 entity is essential for allowing trade in good conditions.

MALAYSIA

In 2016, a stocktaking exercise took place to assess the possibility to resume negotiations. In March 2017, ministers agreed in principle to re-launch the negotiations as soon as possible. The EU is looking for an ambitious FTA, similar to the ones signed with Singapore and Vietnam.

EU poultry meat producers will take an offensive stance in these negotiations.

THAILAND

The negotiations are completely blocked due to the political situation in the country.

AUSTRALIA/NEW ZEALAND

The EU Commission is about to finalize the scoping exercise for both negotiations. The EU Commission has also requested a mandate from the Council but this will be negotiated after the summer break 2017. The European Parliament has drafted a resolution calling for the launch of the negotiations. **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.

ALREADY AGREED TRADE NEGOTIATIONS

JAPAN

The EU and Japan reached an agreement in principle on the main elements of an Economic Partnership Agreement at the EU-Japan summit on 6 July 2017.

The agreement removes the vast majority of duties paid for EU companies with the opening of the Japanese market to key EU agricultural exports.

Based on the agreement in principle from 6 July 2017, negotiators will continue to work on the remaining technical issues hoping to conclude a final text by the end of 2017. Only then will the Commission proceed to the legal verification and translation of the agreement into all EU official languages, and will consequently submit it for the approval of EU Member States and the European Parliament.

Regarding poultry meat, the Commission has secured a complete liberalization on both sides of all tariff lines within a period going from 0, 5 or 10 years.

a.v.e.c. very much welcomes this agreement and congratulates the Commission of the outcome of these negotiations.

SINGAPORE

The negotiations for a comprehensive Free Trade Agreement were completed on 17 October 2014. After the opinion of the European Court of Justice (ECJ) on the EU competence to sign and ratify the FTA, the Commission is discussing with Singapore how to bring the investment protection provisions in the draft agreement in line with EU's new approach.

The draft agreement will then need to be formally approved by the European Commission and then agreed upon by the Council of Ministers, and ratified by the European Parliament.

Singapore already autonomously applies zero duties on the vast majority of imports among them 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 COMMUNITY (SADC):

On 15 July 2014 the EPA negotiations were successfully concluded in South Africa after ten years of negotiations. The EPA is a comprehensive agreement with the whole SADC/EPA group including South Africa. The agreement was signed by the EU and the SADC EPA group on 10 June 2016 and the European Parliament gave its consent on 14 September 2016. The ratification by all EU Member States is pending while the agreement came provisionally into force as of 10 October 2016. The first meeting of the joint Trade and Development Committee took place on 16-17 February 2017.

Mozambique ratified the agreement on 28 April 2017.

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 against 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.

Despite the numerous submissions produced by **a.v.e.c.** demonstrating that the allegations from SA producers are not justified, South Africa imposed unilateraly provisional safeguard duties in December 2016.

Although the TDCA was replaced by EPA, South Africa argued that EPA was grandfatherering TDCA using article 34 of the EPA to continue the procedure. These provisional safeguard duties have expired since the 3rd of July and we are waiting now the final decision of the South African Deprtment of Trade and Industry. This investigation follows the imposition of company and country specific anti-dumping import duties on chicken bone-in portions in 2015 on 3 EU member states, namely Germany, UK and the Netherlands ranging from 3.86% to 73.33%.

a.v.e.c. is of the opinion that these protective measures should be withdrawn as they prevent average consumers in South Africa from eating affordable and high quality EU products, produced under the exact same standards as the products sold on the EU market.

EU producers should not pay the price of the internal deficiencies of the South African poultry production (brining legislation, business model not market oriented, terrible drought who caused an increase of the feed prices).

a.v.e.c. will continue fighting these protectionists measures (including a misuse of SPS measures) in close coordination with the Commission. As the EU is by far the main trading partner for South African exports, the Commission has sufficient leverage at its disposal to make sure that EU poultry meat producers are treated in a fair and satisfactory way.

UKRAINE

The agreement 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. encourages the Commission to reinforce controls on products imported from Ukraine and asks that similar standards to the ones applying on EU producers are implemented on Ukrainian imports.

VIETNAM

Agreement has been found on the 4th of August 2015. The legal review of the text is close to be finalised. The text will then be translated into all official EU languages and into Vietnamese before being presented to the Council for signature and conclusion and the European Parliament for consent. It is expected that the agreement can enter into force in 2018. Preparations to ensure swift practical implementation of this FTA are on-going.

The final version of the text has been published by the Commission: 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.

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PERSPECTIVES ON POULTRY WORLD MARKETS (2017-2026)

Global agriculture projections for 2017-2026

The year 2016 marked a record harvest and abundant production of most commodities. In combination with stagnant demand and high level of existing stocks, it led to very low prices, very far from the level experienced in the last decade. Prices of cereals, dairy and meat have continued to decrease contrary to sugar, oilseeds and vegetable oils which experienced a rebound in 2016. Over the next 10 years, demand growth is expected to slow mainly due to lower Chinese consumption, which was the main driver of the demand in the past decade. Global demand for cereal is expected to remain stable, while additional proteins and calories are predicted to come mainly from dairy products, vegetable oil and sugar.

The growth rate of trade in agriculture commodities is predicted to be reduced by 50 % over the next decade. Nevertheless, trade will represent a constant share of the sector's output. Net exports will develop in the Americas, Eastern Europe and Central Asia while net imports will be concentrated in African and Asian countries. Contrary to imports, exports are located in few supplying countries implying a higher vulnerability to supply shocks compared to demand shocks.

Over the outlook period, the prices are expected to be on a slightly declining trend although prices of agricultural commodities will be subject to high volatility and may show large deviations compared to 10 year period trend.

Global meat sector perspectives

In 2016, global meat production increased by only 1 % (+ 317 million T), the second lowest annual increase of the last decade. The production growth in Europe and the Americas has not compensated the lowering of the Chinese and Australian output. While pork and sheep production have declined, we observed an expansion of poultry and bovine meat.

China has notably increased its imports of meat along with Chile, Korea, Mexico, EU, the Philippines, South Africa and UAE, while US and Canada reduced their imports. The expansion in world meat exports was led by Brazil and the EU. The meat sector's outlook is predicted to be favorable as feed grain prices are expected to remain low during the projection period. Global meat production is predicted to increase by 13 % in 2026 compared to an increase of about 20 % in the last decade. Developing countries will account for the clear majority of this growth, with poultry meat being the primary driver of this increase. On the beef production side, a decline in cattle slaughter will be offset by higher carcass weight. Pigmeat production will keep expanding led by slow herd expansion in China, while new environmental and animal welfare legislation may affect the pork sector. Production is also expected to expand in sheepmeat sector at a 2 % rate per annum, a higher rhythm than in the last decade.

10 % of the meat production is expected to be traded with a fairly constant level over the decade. Import demand will remain low in the first part of the projection, mainly due to limited demand from China and Russian Federation. In the second part, imports will expand driven by Philippines, Vietnam and Sub-Saharan Africa. Despite accounting for more than half of the exports in 2026, the share of the developed country will decrease steadily. Nevertheless, Brazil and US will account for 44 % of the global meat exports in 2026, accounting for 70 % of the increase on the period.

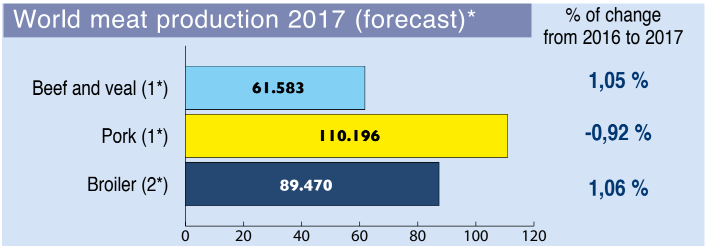
Meat prices will marginally increase and in real terms prices are expected to trend downwards for all types of meat, although meat-to-feed price margin will be maintained.

Finally, global meat consumption per capita is expected to stagnate with a 0,5 kg/capita increase over the decade, reaching a level of 34,6 kg/capita (retail weight equivalent) by 2026. However, given population is predicted to grow over the period, especially in the developing world, it will represent a 1,5 % increase of the global meat consumption per annum. Increased consumption will be mainly located in developing countries, while pig meat consumption will decline on a per capita basis.

Global Poultry production projections

Poultry meat enjoys several comparative advantages over other meats, e.g. affordability, convenience, absence of religious guidelines limiting consumption, healthy image, limited GHG emissions, lower production costs, short rearing time and lower required investments. As a result, production and consumption have been increasing steadily for many years. In the projection, poultry is predicted to be the primary driver of the meat production growth, as a result of the expanding global demand. The affordability of poultry and its low production costs have contributed to make it the preferred meat in developing countries, for both consumers and producers.

In the EU, the production of poultry meat is predicted to continue growing over the outlook period, but at a slightly lower rate, averaging 2,3 % over the next 10 years. The strongest increase in production (1,3 % a year) will be in new Member States such as Hungary, Poland and Romania, mainly due to sustained productivity gains and investments. With relatively low feed prices and strong domestic and world demand, we can expect the total EU production to grow to 15 million T by 2026.



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

1* 1.000 metric tonnes (carcass weight equivalent)
2* 2.000 metric tones (ready to cook equivalent)
*2017 Apr. estimates

1 Retail weight equivalent

Poultry consumption projections

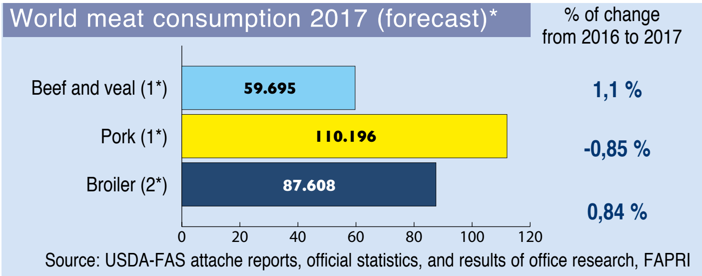
Poultry meat will be the main contributor to the additional meat consumed in the projection period while pork meat consumption will decline on a per capita basis.

In the EU, and thanks to its relative cheapness and healthy image compared to red meat, poultry meat is the only meat for which consumption is expected to expand, reaching 24,4 kg per capita by 2026 and with an annual growth of 0,3%.

Although the per capita consumption in new Member States (EU-13) has overtaken the one of old Member States (EU-15), the rate of growth in the EU-N13 will be less than in previous years, due to markets reaching maturity.

After an important drop of prices in the first half of the projection period, reflecting lower input prices, higher domestic production and increased competition (mainly from Brazil and the USA), it is predicted that prices for EU poultry meat will recover. It will follow world prices, but not beyond past levels, reaching around 1.750 EUR/t by the end of the projection period.

Depending on the evolution of feed costs and macroeconomic environment, prices could vary between 1.420 and 2010 EUR/t over the outlook period.



1* 1.000 metric tonnes (carcass weight equivalent)
2* 2.000 metric tones (ready to cook equivalent)
*2017 Apr. estimates

Poultry projection in trade

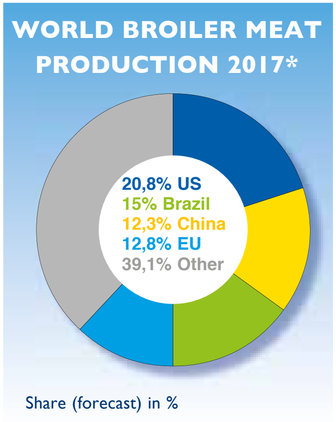
Here again, most of the global increase in volume of meat trade output will come from the poultry sector.

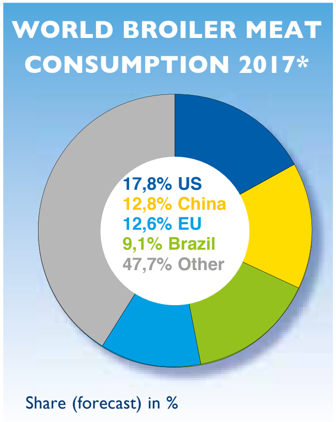
As regards the demand side, world imports of poultry meat are expected to remain very strong, although it may grow at a slower pace (2,4% per year over the next 10 years, as compared with 4,4% over the previous decade). Global imports will reach 15,2 million T by 2026.

An important part of the additional demand will be located almost equally in sub-Saharan Africa, Asia, and the Middle East. Although the asumption is that the Russian import ban will be maintained till the end of 2017, the implementation of a self-sufficiency policy in Russia may lead to lower imports from the EU, even if the ban is removed. Stronger competition may arise in certain markets (e.g. whole chicken), especially from Brazil, which has the capacity to send products at a much lower price, also thanks to its currency devaluation. At the same time, the local meat demand in Brazil has shifted towards more affordable chicken meat due to economic difficulties in the country, which might lead to less competition in the first part of the projection period. Following the end of its avian influenza restrictions, the USA has regained access to the South African market taking back part of EU's market share, knowing that most of EU countries have restricted access to South Africa following AI outbreaks.

In the projection period, EU exports will increase moderately, by an average of 1,4% a year until 2026, reaching 1,7 million T. The particularity of EU's trade in poultry meat is that the EU is importing cuts with higher added value (such as breasts and cooked preparations) while lower-value cuts (such as legs and wings), less appreciated by European consumers, are exported in third countries. In the past, poultry imports tended to settle around the TRQ level or even above (paying full duty). EU imports are predicted to grow gradually from the 2013-2014 lows to fairly close to the quota level (around 1 million t) by 2026, as a consequence of increased production capacities in Thailand and Brazil, two of EU's main suppliers. In these two countries, production should expand by 19% and 24 % respectively by 2026.

EU opened two TRQs in the context of free-trade agreement with Ukraine amounting to 40.000 t net weight in total by 2026. The first TRQ for the imports of poultry meat and preparations is fully used while the second one for frozen whole chicken is only partially used, a situation which is assumed to continue over time.



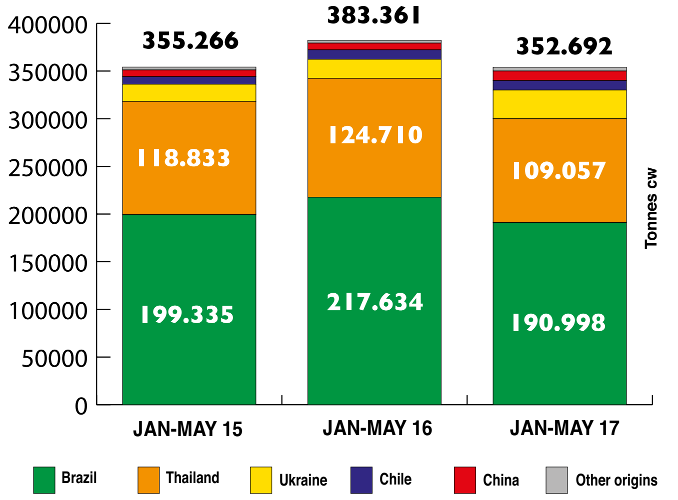


* 2017 April estimates

Main issues and uncertainties for EU poultry meat trade

- The animal disease outbreaks are an important factor that could impact the outlook. In the EU, Countries that have recorded high numbers of bird flu cases have seen a reduction in output which has led to slower expansion of EU poultry production. The European Commission believes expansion will continue to slow throughout the rest of 2017 and 2018 although some EU countries helped offset these reductions by increasing their production. While EU poultry meat production rose by 4.4% in 2016 compared to the previous year, it is expecting the 2017 figure to be just 1.7% up. The slowdown in production growth is expected to continue in 2018 with a 0.8% rise predicted. Trade will be affected and we could notice that EU exports fell between January and April 2017, due to countrywide bans imposed by some major partners.
- In addition to disease outbreaks, the sanitary and food safety issues/scandals may have a dramatic impact on the outlook. Depending on the duration, intensity, potential consumer reactions, and trade restrictions, the bans resulting of these scandals can impact domestic and regional meat production, consumption and trade. The latest massive food fraud in Brazil which has led to several restrictions imposed following the meat scandal is just an example of that.
- Trade policies will also remain one of the most important factors driving the evolution and dynamics of the world meat markets. The signing and implementation of several trade agreements such as the Chinese-Australia, the Canada-Ukraine or the EU-Canada FTAs involving some of the main meat producers could diversify and increase meat trade significantly.
- Domestic policies such as the review of the US Farm Bill in 2018 or the CAP in 2020 may also have an impact of the predictions. 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, could be another risk factor in the projections.
- Another uncertainty relates to the attitude of the consumers towards meat consumption and their changing consuming behaviours. In Western part of the world we observe a willingness to shift towards more free-range and antibiotic-free meat products, but it is difficult to estimate to which extend consumers will be ready and able to pay a premium for this.

IMPORTS of poultry meat into EU (Tonnes cwe)



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

	2011	2012	2013	2014	2015	2016
Gross indigenous production	12.359	12.691	12.798	13.268	13.614	13.766
Export meat	1.290	1.313	1.300	1.350	1.397	1.425
Import of meat	831	841	791	816	828	849
Consumption	11.892	12.210	12.280	12.725	13.036	13.180
Consumption per capita, kg	20,7	21,2	21,3	22,0	22,5	22,7
Self-sufficiency, %	103,9	103,9	104,2	104,3	104,4	104,4

Notes: Partial provisional or estimated.

Source: EU-Commission, so the gross indigenous production is different from the data of the table in the next page

PRODUCTION UPDATED 2016

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

	2011	2012	2013	2014	2015	2016
Austria (17)*	128	125	121	122	122	120
Belgium / Luxembourg (11)	239	250	250	250	250	250
Denmark (13)	180	180	168	173	147	156
Finland (16)	101	108	111	113	116	121
France (2)	1.864	1.849	1.872	1.826	1.828	1.828
Germany (3)	1.681	1.695	1.714	1.775	1.807	1.776
Greece (18)	114	118	119	117	118	119
Ireland (15)	118	124	129	129	125	131
Italy (6)	1.232	1.261	1.259	1.261	1.321	1.387
Netherlands (7)	806	838	848	941	1.057	1.115
Portugal (10)	331	324	324	327	336	342
Spain (5)	1.278	1.251	1.299	1.390	1.453	1.525
Sweden (14)	90	116	128	137	147	155
United Kingdom (4)	1.558	1.607	1.606	1.587	1.663	1.666
Bulgaria (19)	110	100	97	100	102	102
Cyprus (25)	27	25	24	24	23	24
Czech Republic (12)	212	181	171	175	175	175
Estonia (26)	15	15	17	18	18	16
Hungary (8)	466	488	515	543	577	616
Croatia (21)	75	74	68	68	83	81
Latvia (24)	23	24	26	27	27	27
Lithuania (20)	75	80	87	89	92	94
Malta (27)	4	4	4	4	4	4
Poland (1)	1.544	1.712	1.798	2.022	2.173	2.486
Romania (9)	365	335	360	382	353	362
Slovakia (22)	74	75	76	77	78	78
Slovenia (23)	48	50	48	50	51	51
EU-28	**12.789**	**13.018**	**13.210**	**13.727**	**14.246**	**14.808**

*ranking of the country for the variable considered for the year 2016

Note: Partial provisional or estimated. For EU countries some significant differences between national and EUROSTAT data. Rows partly revised, as Eurostat has stopped supplying balances. Now, the data are based more on other sources and own calculations.

Sources: MEG Marktinfo Eier & Geflügel according to EU Commission, national data, FAO and EUROSTAT.

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

	2011	2012	2013	2014	2015	2016
Argentina	1.694	1.710	1.825	1.979	2.012	2.037
Brazil	13.352	13.155	12.828	13.227	13.523	13.814
Chile	652	662	674	689	690	695
China	17.776	18.672	18.913	19.150	19.700	18.700
India	2.268	2.309	2.358	2.651	2.786	2.850
Japan	1.377	1.457	2.079	2.128	2.125	2.100
Mexico	2.798	2.826	2.838	2.880	2.970	3.016
Russia	2.875	3.285	3.448	3.973	4.133	4.253
Saudi Arabia	577	573	582	641	680	682
Switzerland	73	76	80	85	87	91
South Africa	1.493	1.496	1.679	1.724	1.725	1.700
Turkey	1.627	1.737	1.772	1.809	1.839	1.854
Ukraine	880	920	1.020	1.284	1.257	1.262
USA	19.796	19.944	20.235	20.450	20.532	21.009
World Production	**103.377**	**106.867**	**110.369**	**112.933**	**115.500**	**117.810**

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)

	2011	2012	2013	2014	2015	2016	from third countries
Poultry meat 1)							
Austria (9)*	92	104	99	101	103	113	0
Belgium / Luxembourg (5)	189	222	229	240	252	228	1
Bulgaria (10)	102	109	88	98	103	102	1
Cyprus (24)	7	8	10	9	10	11	1
Czech Republic (8)	92	101	96	99	115	117	.
Denmark (13)	67	76	91	69	66	68	1
Estonia (22)	20	18	19	18	18	21	1
Finland (25)	5	5	5	7	9	9	.
France (3)	372	383	381	396	420	426	4
Germany (1)	500	514	571	597	624	648	21
Greece (12)	61	74	76	79	74	79	0
Hungary (20)	47	45	52	50	36	34	0
Ireland (11)	60	65	72	82	104	85	1
Italy (15)	54	60	63	66	66	59	3
Latvia (21)	28	29	30	30	49	31	0
Lithuania (19)	24	31	33	33	37	35	0
Malta (26)	5	4	5	5	6	6	.
Netherlands (4)	470	450	431	429	396	370	71
Poland (18)	33	44	40	38	36	47	1
Portugal (14)	48	46	53	59	64	67	0
Romania (7)	91	111	96	119	125	137	6
Slovakia (17)	46	32	57	52	49	54	1
Slovenia (23)	13	14	15	15	17	18	0
Spain (6)	124	122	127	116	155	159	25
Sweden (16)	38	43	46	49	52	55	0
United Kingdom (2)	411	393	396	387	409	434	18
EU	**184**	**184**	**149**	**152**	**155**	**156**	
Salted meat 2)							
Germany	38	37	38	47	47	50	
Netherlands	140	154	160	173	170	173	
United Kingdom	47	44	50	55	59	60	
EU from third countries	**207**	**212**	**227**	**256**	**264**	**276**	
Preparations of poultry 3)							
EU from third countries	**441**	**442**	**397**	**380**	**387**	**401**	

* ranking of the country for the variable considered for the year 2016

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])

	2011	2012	2013	2014	2015	2016	from third countries
Austria (14)*	52	58	55	60	58	57	2
Belgium / Luxembourg (3)	436	488	473	481	538	507	99
Bulgaria (16)	47	47	36	41	40	41	2
Cyprus (25)	2	2	1	1	0	1	1
Czech Republic (17)	25	31	30	31	35	37	1
Denmark (11)	87	82	77	77	67	74	25
Estonia (24)	9	6	7	6	6	7	0
Finland (22)	15	17	18	16	17	16	6
France (5)	548	526	519	477	478	433	254
Germany (4)	467	501	510	543	508	482	64
Greece (20)	22	23	22	26	21	21	9
Hungary (7)	172	189	195	204	209	211	41
Ireland (10)	78	63	52	59	69	71	21
Italy (9)	151	149	147	149	154	178	61
Latvia (23)	8	9	14	15	11	13	2
Lithuania (15)	31	39	43	46	49	47	10
Malta (26)	0	0	0	0	0	0	0
Netherlands (1)	1.217	1.061	1.073	1.223	1.156	1.248	370
Poland (2)	442	528	587	714	850	1.024	246
Portugal (19)	17	18	19	20	25	28	9
Romania (12)	75	79	70	59	66	66	5
Slovakia (18)	28	34	36	37	33	30	1
Slovenia (21)	18	18	19	20	17	20	7
Spain (8)	147	129	137	178	198	230	96
Sweden (13)	44	51	52	60	65	76	8
United Kingdom (6)	195	296	350	352	299	296	98
EU-27/EU-28 [2]	**1.266**	**1.275**	**1.269**	**1.331**	**1.332**	**1.443**	
which were							
Chicken	1.084	1.091	1.096	1.161	1.172	1.269	
Turkey	143	154	142	138	129	143	
Ducks, geese, guinea fowls	40	30	31	31	30	31	
Preparations of poultry [3]							
EU to third countries	**49**	**50**	**42**	**40**	**38**	**39**	

* ranking of the country for the variable considered for the year 2016

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

Foreign trade of poultry and chicken meat ('000 tons) by third country

	2011	2012	2013	2014	2015	2016
Total imports of poultrymeat						
Switzerland	46	46	45	47	47	46
Imports of broiler meat						
Angola	287	301	321	365	240	.
China	238	254	244	260	268	430
Hong Kong 1)	410	300	272	299	312	344
Irak	598	610	673	698	625	661
Japan	895	877	854	888	936	973
Russia	463	560	530	443	249	220
Saudi Arabia	745	750	838	762	863	800
United Arab Emirates	.	223	217	225	277	296
Exports of broiler meat						
Argentina	224	295	334	278	187	158
Brazil	3.443	3.508	3.482	3.558	3.841	3.889
Chile	90	93	88	87	99	.
China	422	411	420	430	401	386
Thailand	467	538	504	546	622	690
Turkey	206	284	337	379	321	296
Ukraine	43	74	141	167	159	236
USA	3165	3299	3332	3310	2867	3015
Russian Federation	74	105	105	113	135	145

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

CONSUMPTION

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

	2011	2012	2013	2014	2015	2016
Austria (9)*	20,8	21,1	20,6	21,1	21,3	21,5
Belgium / Luxembourg	16,8	.	.	.	.	.
Czech Republic (7)	24,0	23,0	22,5	22,5	23,0	22,7
Denmark	24,1	.	.	24,0	.	.
Finland (15)	16,9	17,4	17,6	18,1	18,4	17,5
France (5)	25,2	25,7	26,0	26,5	27,1	27,3
Germany (10)	19,4	19,0	19,4	19,5	20,1	20,9
Greece (11)	20,5	20,7	21,0	20,8	20,2	20,2
Hungary (2)	29,0	29,5	30,0	30,5	30,8	31,1
Ireland (3)	29,5	30,0	30,3	30,4	31,0	30,8
Italy (14)	18,7	19,0	19,0	18,8	19,3	19,8
Latvia (14)	19,7	20,0	19,5	19,5	20,0	19,8
Lithuania (6)	22,5	22,7	23,0	22,8	22,9	23,1
Netherlands (8)	22,1	22,0	22,3	22,1	22,3	22,4
Poland (4)	24,6	25,0	26,4	26,8	28,5	28,9
Portugal (1)	39,8	39,7	39,8	39,0	39,0	39,2
Slovakia (12)	20,0	19,8	20,0	19,8	19,9	20,1
Spain (3)	30,5	30,0	30,5	30,8	31,0	30,8
Sweden (13)	17,0	17,6	18,8	19,8	20,0	19,9
United Kingdom (4)	28,5	28,7	28,7	28,5	28,7	28,9
EU	**20,7**	**21,2**	**21,3**	**22,0**	**22,5**	**22,7**
Switzerland	17,8	17,7	17,9	18,6	19,0	18,8

* ranking of the country for the variable considered for the year 2016

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 (%)

	2011	2012	2013	2014	2015	2016
Austria (15)*	73	70	70	67	67	66
Belgium / Luxembourg	190	.	.	.	.	.
Czech Republic (12)	78	74	76	76	74	74
Denmark	135	.	.	.	.	.
Finland (5)	105	107	107	106	106	105
France (7)	114	110	107	105	104	100
Germany (6)	108	111	110	112	110	103
Greece (11)	80	79	78	79	78	75
Hungary (3)	136	138	137	139	143	140
Ireland (9)	104	100	100	99	95	98
Italy (4)	110	108	107	107	107	109
Latvia (14)	53	54	62	64	65	70
Lithuania (8)	93	95	95	97	98	99
Netherlands (1)	217	224	226	230	232	.
Poland (2)	139	139	140	144	150	158
Slovakia (13)	70	78	72	75	75	73
Spain (5)	101	100	100	104	103	105
Sweden (6)	95	97	96	98	99	103
United Kingdom (10)	87	89	92	93	94	92
EU	**104**	**104**	**104**	**104**	**104**	**104**

* ranking of the country for the variable considered for the year 2016

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)

	2011	2012	2013	2014	2015	2016
Austria (19)*	91	89	89	91	93	96
Belgium / Luxembourg (9)	362	362	362	362	362	362
Bulgaria (18)	107	112	103	103	103	103
Cyprus (25)	27	25	23	23	23	24
Czech Republic (13)	181	158	155	161	160	160
Denmark (14)	175	175	168	173	146	155
Estonia (26)	15	15	17	17	18	18
Finland (17)	93	99	104	106	108	114
France (5)	1.096	1.091	1.146	1.116	1.139	1.134
Germany (3)	1.150	1.160	1.220	1.280	1.300	1.285
Greece (12)	160	160	160	160	162	162
Hungary (8)	254	280	305	329	365	390
Ireland (16)	110	116	117	118	110	115
Italy (7)	796	861	863	872	929	980
Croatia (22)	60	61	58	57	69	67
Latvia (24)	23	24	26	26	26	26
Lithuania (20)	75	79	87	87	87	87
Malta (27)	4	4	4	4	4	4
Netherlands (6)	710	738	750	926	1.046	1.098
Poland (1)	1.234	1.305	1.395	1.568	1.699	1.976
Portugal (11)	265	258	259	261,6	271	278
Romania (10)	359	325	310	310	350	350
Slovakia (21)	66	66	68	69	70	70
Slovenia (23)	47	49	47	47	48	48
Spain (4)	1.073	1.063	1.041	1.053	1.203	1.254
Sweden (15)	80	80	90	103	113	137
United Kingdom (2)	1.297	1.322	1.391	1.383	1.456	1.471
EU	**9.910**	**10.078**	**10.541**	**10.805**	**11.460**	**11.964**
Argentina	1.770	2.014	2.060	2.050	2.080	2.055
Brazil	12.863	12.645	12.308	12.692	13.547	13.523
China	13.200	13.700	13.350	13.000	13.400	12.300
India	2.900	3.160	3.450	3.725	3.900	4.200
Indonesien	1.515	1.540	1.550	1.565	1.625	1.640
Iran	1.913	1.956	1.962	1.962	1.962	.
Mexico	2.906	2.958	2.907	3.025	3.175	3.270
Russia	2.575	2.830	3.010	3.260	3.600	3.720
South-Africa	1.486	1.489	1.497	1.497	1.497	.
Thailand	1.350	1.550	1.500	1.570	1.700	1.780
USA	16.694	16.621	16.976	17.306	17.971	18261
World	**91.049**	**94.020**	**97.620**	**100.353**	**102.300**	**103.500**

* ranking of the country for the variable considered for the year 2016

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 from USDA, FAO and national figures.

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

	2011	2012	2013	2014	2015	2016
Austria	13,1	13,3	13,3	13,9	14,1	14,3
France	15,2	15,8	16,2	16,9	17,2	18,1
Germany	11,4	11,1	11,7	11,8	12,4	12,7
Italy	11,6	11,7	11,7	11,9	12,5	12,5
Netherlands	18,4	18,4	18,5	.	.	.
Portugal	.	.	.	26,0	.	.
United Kingdom	21,7	22,0	22,5	22,5	22,9	23,2
EU-15	**16,8**	**17,1**	**17,2**	**18,0**	**18,5**	**18,6**
Third Countries						
Argentina	38,2	42,0	41,9	41,3	43,6	44,6
Brazil	47,8	46,0	43,2	44,3	44,8	45,3
China	9,4	9,8	9,5	9,2	9,4	9,0
India	2,3	2,5	2,7	2,9	3,0	3,2
Iran	23,3	.	.	.	.	.
Japan	16,5	17,4	17,4	17,6	18,3	18,7
Mexico	29,1	29,5	30,1	29,8	31,2	31,8
South Africa	28,9	30,2	29,5	29,1	31,0	32,6
United Arab Emirates	.	.	.	.	.	.
USA	43,7	42,4	43,2	43,9	46,9	47,4

Note: Mainly estimated official data on chicken consumption of only a few countries available due to lack of data, the continuation of the 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)

	2011	2012	2013	2014	2015	2016
Austria (10)*	25	26	22	21	25	25
Belgium / Luxembourg (15)	5	5	5	5	5	5
Bulgaria (18)	1	1	1	1	1	1
Croatia (11)	13	12	9	10	13	13
Cyprus (19)	0	0	0	0	0	0
Czech Republic (21)	4,2	7,8	5	5	6	6
Denmark (18)	2	2	2	2	1	1
Finland (14)	8	8	7	7	8	8
France (2)	406	415	386	362	355	373
Germany (1)	398	392	384	392	396	409
Greece (17)	3	3	3	3	3	3
Hungary (7)	101	95	89	93	97	98
Ireland (13)	10	9	8	7	10	10
Italy (4)	276	315	314	310	313	330
Malta (19)	0	0	0	0	0	0
Netherlands (9)	28	28	28	28	28	28
Poland (3)	272	288	280	280	312	368
Portugal (8)	38	39	39	37	38	39
Romania (12)	5	10	10	11	12	12
Slovakia (13)	8	8	8	8	8	8
Slovenia (18)	7	7	7	1	1	1
Spain (5)	104	111	177	181	171	203
Sweden (16)	4	4	4	4	4	4
United Kingdom (6)	171	196	187	172	177	166
EU-28	**1.887**	**1.981**	**1.946**	**1.944**	**1.983**	**2.109**
Brazil	489	510	520	535	.	.
Canada	160	161	165	165	170	.
Mexico	13	14	10	10	.	.
Russia	90	100	100	105	.	.
South Africa	53	53	53	53	.	.
USA	2.592	2.671	2.623	2.611	2.552	2.713
World	**5.585**	**5.805**	**5.621**	**5.611**	**5.620**	**5.900**

* ranking of the country for the variable considered for the year 2016

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 from FAO, USDA and national data.

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

	2011	2012	2013	2014	2015	2016
Austria	6,1	6,2	5,9	5,8	5,5	5,5
France	5,1	5,3	5,2	5,1	4,6	4,8
Germany	6,1	6,1	5,8	5,9	5,9	6,1
Italy	4,7	4,8	4,8	4,9	4,9	.
Netherlands	1,0	1,0	1,1	1,1	1,1	.
Portugal	.	.	5,0	4,9	.	.
United Kingdom	4,1	4,2	4,2	4,1	.	.
EU-27/EU-28	**3,6**	**3,8**	**3,8**	**3,6**	**3,7**	**3,8**
Third Countries						
Brazil	1,8	1,7	1,7	1,8	.	.
Canada	4,3	4,1	4,1	4,1	.	.
Mexico	1,4	1,4	1,4	1,4	.	.
Russia	0,8	0,8	0,8	0,8	.	.
USA	7,3	7,3	7,3	7,2	7,2	7,6

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)

	2011	2012	2013	2014	2015	2016
Austria (15)*	0,2	0,1	0,1	0,1	0,1	0,2
Belgium / Luxembourg (16)	0,1	0,1	0,0	0,1	0,1	0,1
Denmark (12)	3,5	3,5	3,5	3,5	4,0	4,0
Finland (17)	0,0	0,0	0,0	0,0	0,0	0,0
France (1)	242,6	240,4	223,3	230,0	231,6	204,0
Germany (3)	62,4	63,3	51,3	51,1	50,3	49,5
Greece (15)	0,2	0,2	0,2	0,2	0,2	0,2
Ireland (11)	4,0	4,2	4,0	4,5	5,1	6,0
Italy (10)	14,0	14,0	13,0	11,0	9,0	7,0
Netherlands (7)	17,0	17,0	17,0	15,0	16,0	17,0
Portugal (8)	9,0	8,5	8,0	9,7	9,9	10,0
Spain (13)	4,3	6,0	5,0	5,0	2,0	2,0
Sweden (17)	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom (5)	33,0	32,1	30,4	32,1	29,2	28,7
Bulgaria (6)	21,0	20,1	21,0	22,0	22,0	22,0
Cyprus (17)	0,2	0,0	0,0	0,0	0,0	0,0
Czech Republic (9)	4,9	4,2	4,8	7,3	8,0	8,0
Estonia	.	.	.	.	.	.
Hungary (2)	71,0	69,6	76,5	79,8	84,0	90,8
Latvia	.	.	.	.	.	.
Lithuania (16)	0,3	0,3	0,3	0,1	0,1	0,1
Malta	.	.	.	.	.	.
Poland (4)	12,0	15,7	28,5	41,4	44,6	48,4
Romania	.	.	.	.	.	.
Slovakia (14)	0,4	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
EU	**508,0**	**509,0**	**496,0**	**532,0**	**523,0**	**510,0**
World	**4.183**	**4.342**	**4.388**	**4.331**	**.**	**.**

* ranking of the country for the variable considered for the year 2016

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 from FAO, USDA and national data

PROJECTIONS

POULTRY MEAT MARKET PROJECTIONS FOR THE EU-28, 2017-2026 (‘000 t carcass weight equivalent)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Gross indigenous Production	14.949	14.580	14.656	14.727	14.780	14.832	14.883	14.935	14.990	15.043
of which EU-15	10.654	10.683	10.712	10.737	10.743	10.749	10.754	10.760	10.767	10.774
of which EU-N13	3.840	3.897	3.945	3.990	4.037	4.083	4.129	4.175	4.223	4.269
Imports	913	931	934	942	950	961	972	983	990	1000
Exports	1.509	1.544	1.539	1.545	1.565	1.589	1.614	1.640	1.666	1.695
Net Trade	596	613	605	603	615	628	643	657	676	695
Consumption*	13.897	13.967	14.052	14.124	14.164	14.203	14.241	14.278	14.314	14.349
of which EU-15	10.877	10.952	11.039	11.111	11.151	11.190	11.228	11.266	11.302	11.337
of which EU-N13	3.020	3.016	3.012	3.013	3.014	3.013	3.012	3.012	3.012	3.011
Population growth (in %)	0.4	0.3	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
of which EU-15	0.5	0.2	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.2
of which EU-N13	-0.2	-0.2	-0.3	-0.3	-0.3	-0.3	-0.3	-0.4	-0.4	-0.3
Per Capita Consumption*	23.8	23.9	24.0	24.1	24.1	24.2	24.2	24.3	24.3	24.4
of which EU-15	23.4	23.4	23.6	23.7	23.7	23.8	23.8	23.9	23.9	23.9
of which EU-N13	25.5	25.5	25.5	25.6	25.7	25.7	25.8	25.9	26.0	26.1

*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 2016-2026, The European Commission, DG AGRI, December 2016 (http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/2015/fullrep_en.pdf)

AGGREGATE MEAT MARKET PROJECTIONS FOR THE EU 2017-2026 ('000 t carcass weight equivalent)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Gross Indigenous Production	47.115	46.973	46.969	47.067	47.110	47.176	47.258	47.344	47.410	47.522
of which EU-15	38.522	38.389	38.432	38.473	38449	38451	38469	38493	38522	38550
of which EU-N12	8.593	8.584	8.536	8.594	8.661	8.725	8.789	8.851	8.889	8.972
Imports of live animals	0	0	0	1	1	0	0	0	0	0
Exports of live animals	302	287	259	245	236	231	221	215	210	203
Net production	46.814	46.686	46.710	46.822	46.874	46.945	47.038	47.129	47201	47320
Imports (meat)	1.452	1.495	1.504	1.518	1.536	1.551	1.565	1.578	1.588	1.599
Exports (meat)	4.347	4.343	4.302	4.348	4.397	4.457	4.521	4.574	4.609	4.679
Net trade	2.895	2.848	2.797	2.830	2.861	2.906	2.956	2.996	3.021	3.081
Consumption*	43.922	43.841	43.916	43.992	44.009	44.036	44.080	44.131	44.181	44.242
of which EU-15	35.749	35.657	35.723	35.817	35.837	35.868	35.913	35.952	36.011	36.089
of which EU-N13	8.173	8.184	8.193	8.175	8.171	8.168	8.167	8.179	8.170	8.152
Population growth (in %)	0.4	0.3	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
of which EU-15	0.5	0.2	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.2
of which EU-N13	-0.2	-0.2	-0.3	-0.3	-0.3	-0.3	-0.3	-0.4	-0.4	-0.3
Per capita consumption*	68.4	68.1	68.2	68.2	68.2	68.2	68.2	68.3	68.3	68.4
of which EU-15	69.6	69.2	69.2	69.3	69.2	69.1	69.1	69.1	69.1	69.2
of which EU-N13	63.7	63.8	64.1	64.1	64.3	64.4	64.7	65.0	65.1	65.2
of which Beef/Veal	10.9	10.6	10.5	10.5	10.4	10.3	10.3	10.3	10.2	10.2
of which Sheep/goat	1.9	1.9	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
of which Pig meat	31.8	31.7	31.7	31.7	31.7	31.7	31.7	31.8	31.8	31.8
of which Poultry meat	23.8	23.9	24.0	24.1	24.1	24.2	24.2	24.3	24.3	24.4

*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 2016-2026, The European Commission, DG AGRI, December 2016 (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 – 2015 – 2016

IMPORTS

Source: Extraction EUROSTAT, May 2017

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2015	2016	2015	2016
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	4.349.336	1.774.498	1.545.109	1.563.953	216,14	189,54
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65 % chickens'	111.011	114.059	101.427	155.045	143,98	129,73
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.419.962	1.018.232	960.831	861.566	243,87	209,85
02071460	Frozen legs and cuts thereof of fowls of the species gallus domesticus, with bone in	408.140	120.717	56.335	54.411	126,89	120,97
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	13.476	8.601	159,21	144,85
02072710	Frozen boneless cuts of turkeys of the species domesticus	173.417	144.333	103.230	138.835	347,25	339,52
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	32.804	1.956.437	2.654.064	2.758.074	243,38	211,14
1602 (poultry)	**PREPARED/PRESERVED MEAT**	3.067.385	4.287.206	3.866.257	4.007.578	350,52	317,30
160231	**TURKEYS**	945.029	844.275	490.303	404.482	307,54	329,11
16023111	**Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)**	927.933	796.703	471.959	394.005	298,19	319,94
160232	**GALLUS DOMESTICUS**	2.052.387	3.305.460	3.216.848	3.451.093	345,52	306,84
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	143.243	159.871	257,80	196,38
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	2.416.879	2.598.024	386,75	344,12
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	638.261	677.032	208,67	188,78
16023290	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus (excl. that containing >= 25% meat or offal of poultry, meat or offal of turkeys or guinea fowl, etc.)	6.729	52.694	18.473	16.164	359,32	352,14
160239	**OTHER**	69.969	137.471	159.106	152.003	583,92	523,58
16023929	Cooked. prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus, containing >= 57% meat or offal of poultry	56.094	132.063	156.036	148.585	584,00	524,00

EXPORTS

Source: Extraction EUROSTAT, May 2017

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100KG	
		2005	2010	2015	2016	2015	2016
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	8.558.970	11.244.041	13.059.300	14.159.488	112,65	92,68
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	238.238	236.448	161.865	150.565	126,56	84,02
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	2.742.477	2.503.851	150,00	113,58
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.070.511	1.872.414	2.080.987	2.656.700	51,44	45,40
02071420	Frozen halves or quarters of fowls of the species gallus domesticus	386.980	1.077.792	1.550.723	1.757.592	109,02	85,07
02071430	Frozen whole wings, with or without tips of Gallus domesticus	646.017	946.854	1.619.187	1.861.122	127,26	122,69
02071460	Frozen legs and cuts thereof of fowls of the species gallus	280.842	490.015	969.952	971.267	104,05	87,94
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	737.332	590.837	97,55	88,66
02072710	Frozen boneless cuts of turkeys of the species domesticus	577.512	306.916	229.203	273.777	96,50	90,26
02072730	Frozen whole wings, with or without tips, of turkeys	178.987	217.395	350.633	380.882	144,02	84,99
0207 other		2.100.561	2.701.830	2.616.941	3.012.895	119,10	106,85
1602 (poultry)	**PREPARED/PRESERVED MEAT**	290.382	451.698	379.935	393.394	351,76	351,52
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	172.007	187.282	323,11	334,88
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	60.206	57.016	357,67	344,98
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	147.722	149.096	382,71	374,94

ADOPTED, FORTHCOMING AND PENDING EU LEGISLATIVE PROPOSALS

ANIMAL HEALTH

"Smarter rules for safer food": new proposal on EU Animal Health Law and Official controls

The Regulation enters into force on the twentieth day following that of its publication and will be applicable in 5 years (2021). 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

Official controls

Regulation (EU) 2017/625 of the European Parliament and of the Council of 15 March 2017 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 and plant protection products, amending Regulations (EC) No 999/2001, (EC) No 396/2005, (EC) No 1069/2009, (EC) No 1107/2009, (EU) No 1151/2012, (EU) No 652/2014, (EU) 2016/429 and (EU) 2016/2031 of the European Parliament and of the Council, Council Regulations (EC) No 1/2005 and (EC) No 1099/2009 and Council Directives 98/58/EC, 1999/74/EC, 2007/43/EC, 2008/119/EC and 2008/120/EC, and repealing Regulations (EC) No 854/2004 and (EC) No 882/2004 of the European Parliament and of the Council, Council Directives 89/608/EEC, 89/662/EEC, 90/425/EEC, 91/496/EEC, 96/23/EC, 96/93/EC and 97/78/EC and Council Decision 92/438/EEC
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32017R0625

Antimicrobial resistance (AMR)

The new EU action plan on AMR 'Communication from the Commission to the Council and the European Parliament: A European One Health Action Plan against Antimicrobial Resistance (AMR)'
This new One Health action plan is motivated by the need to fight against AMR, with the EU supporting Member States through EU added value actions, leading and contributing towards this global issue. Its overarching goal is to counteract emerging resistances, their spread and ensure that there continues to be availability of effective treatment for infections in humans and animals. It provides a framework for continued, coherent and more extensive action to tackle AMR.
Action Plan: https://ec.europa.eu/health/amr/sites/amr/files/amr_action_plan_2017_en.pdf

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.
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

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.
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

FOOD AND FEED SAFETY

Microbiological criteria for Campylobacter

The Commission regulation (EC) no 2073/2005 lays down the microbiological criteria for certain micro-organisms and the implementing rules that food business operators must comply with in respect of general and specific hygiene requirements. In particular the regulation lays down 'process hygiene criteria' which set indicative contamination values above which corrective action is required in order to maintain the hygiene of the process in compliance with food law.
The new Commission regulation amends regulation (EC) no 2073/2005 by setting a process hygiene criterion for Campylobacter in broiler carcasses. The objective is to reduce the risk of human campylobacteriosis, which is linked to broiler meat and is one of the most commonly reported human food-borne illnesses in the EU.
Process hygiene criteria are defined under Regulation (EC) No 2073/2005 as criteria indicating the acceptable functioning of the production process. These criteria are not applicable to the products placed on the market, they set an indicative contamination value above which corrective actions are required in order to maintain the hygiene of the process in compliance with the legislation.

The regulation will then be published in the Official Journal and enter into force. It will start applying on 1 January 2018.

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.
http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32017R0625

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 2015 -
https://www.efsa.europa.eu/en/efsajournal/pub/4634

TRADE

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.

EU-Canada CETA (Comprehensive Economic and Trade Agreement)

CETA has been approved by EU Council, EU Parliament and Canadian Parliament will enter into force provisionally on 21 September 2017.
The text and the different chapters of the agreement are available here:
http://ec.europa.eu/trade/policy/in-focus/ceta/ceta-chapter-by-chapter/

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