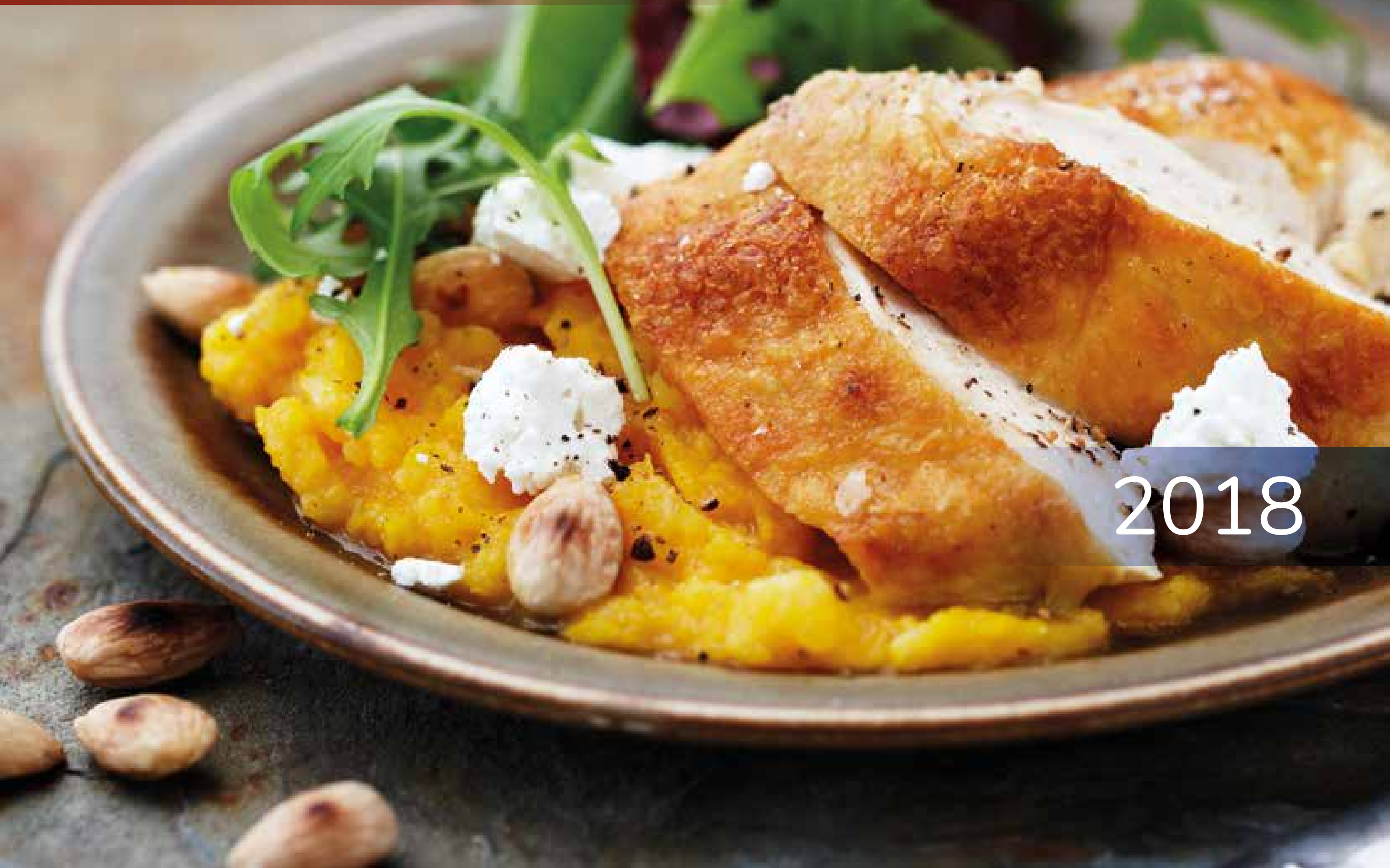
AVEC

THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

Annual report

2018



Association of Poultry Processors and Poultry Trade in the EU Countries ASBL

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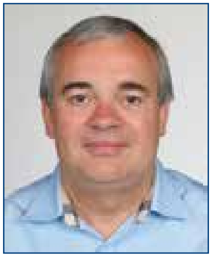
European poultry producers are raising healthy, thriving birds

European farm-to-fork principles ensure a high level of food safety

The European poultry meat sector is producing more with less

The poultry meat sector is an asset in trade with non-EU countries

President and secretariat



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Acknowledgements: AVEC thanks BPC, CIDEF and HK SCAN Denmark for their contribution to the 2018 annual report

Introduction

Since 2017, poultry meat has been the most eaten meat in the world. In the context of growing demand, poultry meat has many strengths which are likely to further contribute to its growing presence in the marketplace.

The European poultry meat sector is an example of solid European excellence in farming and food production. The sector is highly integrated with a holistic approach driven by science, innovation and entrepreneurship that is delivering sustainable, secure and trusted supply chains.

The vision of AVEC is to bring European poultry to every table. Every consumer, every food professional, every official and every politician needs to know the high value of the European poultry sector.

By choosing European poultry meat, consumers all over the world make a quality choice and we are committed to maintaining consumer confidence in our products via a high level of knowledge, innovation and transparency.

The ongoing success of the European poultry meat sector is defined by its commitment to these core aims:

- **to provide EU citizens with healthy, sustainable, safe and affordable meat**
- **to contribute to a healthy EU economy by creating jobs and supporting trade**
- **to defend and uphold EU food safety, animal welfare and environmental protection standards**

The health and welfare of animals is one of the cornerstones of AVEC. We do everything we can to keep our animals healthy. If animals do become ill, they must be treated properly. In some instances, antibiotics may be required to treat bacterial infections, but they should only be administered when necessary and only following a veterinary diagnosis and prescription. AVEC is committed to promoting the responsible use of antibiotics to minimise the risk of antimicrobial resistance.

Poultry meat is the most traded meat globally and the European sector has more than once been traded off against other sectors when finalising trade deals. This has led to more imports to the detriment of jobs and farms in our EU rural areas. **This is not acceptable**. Poultry meat should always be treated as a sensitive product in trade negotiations.

The compliance of poultry meat imported from third countries with EU legislation on food safety, animal health, environment and animal welfare is an absolute requirement. Cases during the last year have highlighted significant non-compliance with EU rules on imports from third countries. AVEC calls for the stricter control of all imports of poultry meat from third countries. When it comes to trade deals, AVEC is concerned when trading partners act against the spirit of ratified free trade agreements. EU stakeholders need to be in very close dialogue with the Commission when technicalities are being concluded with partners, to limit the risk of trade being done against the spirit of the agreements.

The UK withdrawal from the EU in 2019 could have a significant impact on the EU poultry sector for both parties. The EU poultry sector (including our UK member) advocates strongly for a status quo regarding a future free trade agreement and the split of imports from third countries with the application of EU regulations and no border control or custom clearance.

By advocating for European policies which will work on the global stage, AVEC will continue to work for the development of a solid and thriving European poultry meat sector.

Paul Lopez
President

Birthe Steenberg
Secretary General

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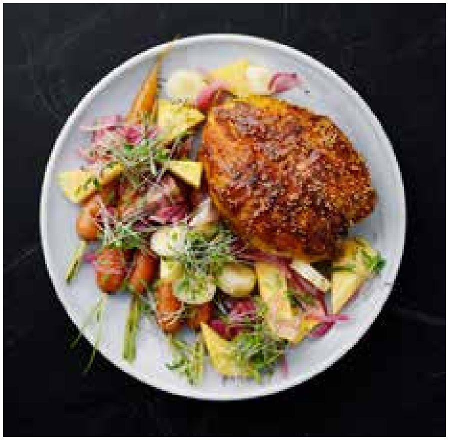
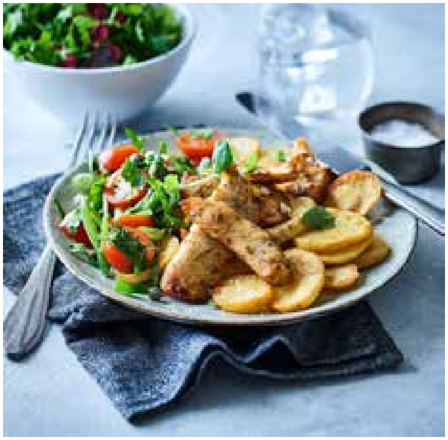
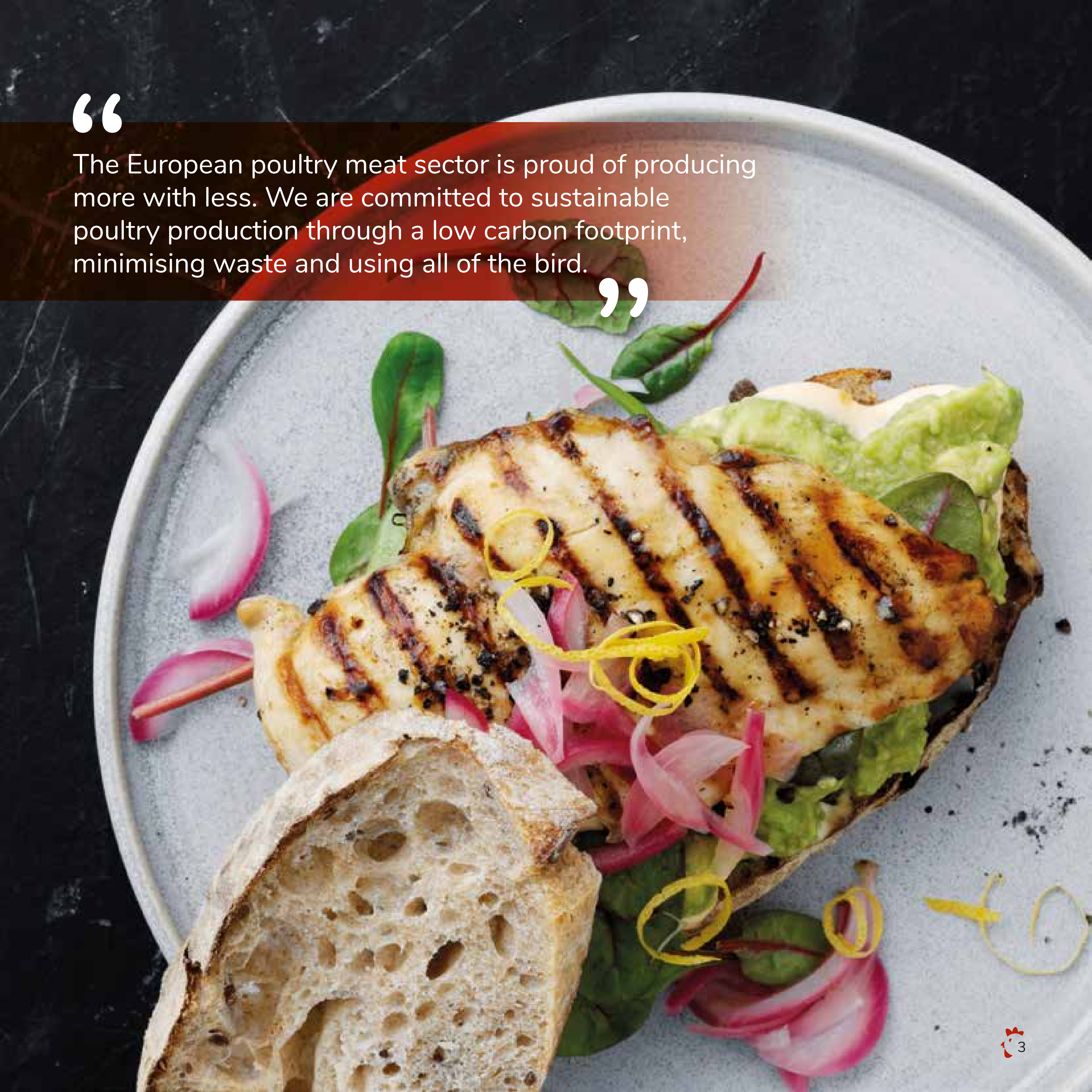




> The European poultry meat sector is proud of producing more with less. We are committed to sustainable poultry production through a low carbon footprint, minimising waste and using all of the bird.



Our association

Who are we?

AVEC is the voice of the European poultry meat sector. We facilitate communication between international organisations and decision-makers and focus on key areas such as animal health and welfare, food safety and quality, trade, and sustainable development.

Our core aims:

- **to provide EU citizens with healthy, sustainable, safe and affordable meat**
- **to contribute to a healthy EU economy by creating jobs and supporting trade**
- **to defend and uphold EU food safety, animal welfare and environmental protection standards**

Our members are national organisations representing poultry processors and the poultry trade in 15 EU countries. AVEC's members represent 95% of EU poultry meat production. Our vision is for a future with European poultry on every table.

We are committed to improving knowledge, innovation, and transparency in the European poultry meat sector. Our values mean that every consumer, food professional, official, and politician can have confidence in our products.

Administrative structure

The AVEC secretariat is based in Brussels and gathers information and analyses of current issues, distributing these to the member organisations. The office is led by the secretary general, Birthe Steenberg, who is assisted by two policy advisors, Laura Mazzei and Paul-Henri Lava.

The Presidency and the Board

The president of AVEC is Paul Lopez from the French association FIA (Fédération des Industries Avicoles).

AVEC has four vice-presidents who assist the president. Piotr Kulikowski from KRD (Poland), Paul-Heinz Wesjohann from BVG (Germany), Philip Wilkinson from BPC (UK), and Mario Veronesi from Unaitalia (Italy).

Our general assembly takes place on an annual basis, usually in September or October, with up to 150 delegates participating. 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.

AVEC working groups:

AVEC's five working groups are committed to tackling some of the key areas in the European poultry meat sector.

- the **Animal health and welfare working group** focuses on an area that is critically important to AVEC and the European poultry industry: protecting animal health and welfare.
- the **Food safety and food quality working group** is committed to producing food that consumers can trust. It defends food safety standards around Europe and brings quality products to the table.
- the poultry sector is working to increase the efficiency of production to address the challenge of climate change. AVEC supports this through its **Sustainable production working group.**
- AVEC's **Trade working group** supports WTO multilateral trade agreements. It actively contributes to EU initiatives to strengthen exports and introduce bilateral free trade agreements with third-country trading partners.
- the **Communication working group** enhances the communication surrounding the promotion of the EU poultry meat sector, raising its profile on the EU agenda. AVEC's new logo, website and updated annual report are the first tangible results of its work.

Our members

AVEC represents the European poultry sector, giving a voice to all participants. Our members include national organisations that represent the poultry industry and poultry trade in 15 EU member states.

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Board members, 2018–2019

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BELGIUM	Philip Eeckman	Ann Truyen
DENMARK	Stig Munck Larsen	vacancy
FINLAND	Mari Lukkariniemi	Matti Perälä
FRANCE	Paul Lopez	Yann Brice
GERMANY	Paul-Heinz Wesjohann	Thomas Janning
HUNGARY	Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
NETHERLANDS	Gert Jan Oplaat	Peter Vesseur
POLAND	Piotr Kulikowski	Lukasz Dominiak
PORTUGAL	Avelino Gaspar	José António dos Santos
ROMANIA	Ilie Van	Ovidiu Oprita
SPAIN	Claudio Arenas	Angel Martin
SWEDEN	Maria Donis	Magnus Lagergren
UNITED KINGDOM	Philip Wilkinson	Richard Griffiths

“AVEC’s vision is for a future with European poultry on every table.”

EU and International key partners

AVEC cooperates with many other international organisations depending on the issues at hand. **AVEC** has regular contact with other stakeholders in the agri-food sector, in particular within the meat sector. The exchange of views with other key stakeholders on technical and strategic issues is extremely useful.

AVEC shares its Brussels offices and team with the European Live Poultry and Hatching Egg Association (**ELPHA**) as well as with the European Poultry Breeders (**EPB**).

ELPHA promotes the common interests of the European live poultry sector in the policy area of live poultry and hatching eggs, making representations to the European institutions. The main interests of **ELPHA** members are in the areas of EU trade and export, animal health, animal welfare and genetics. ELPHA also recognises that food safety and security starts with the high-quality production of live poultry.

EPB is a member of ELPHA and promotes the interests of companies that are active in poultry breeding in the EU.

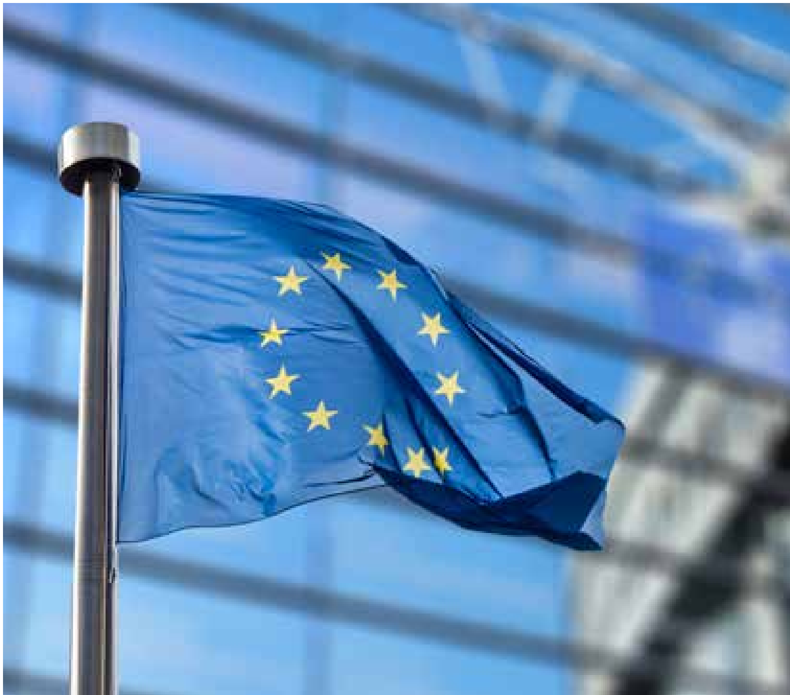
The close connection between **AVEC** and **ELPHA/EPB** allows the European poultry sector to profit from the mutual sharing of knowledge on common poultry issues, strengthening our efforts to improve the EU poultry industry's global competitiveness.

AVEC also has valuable communication and cooperation with **COPA-COGECA**, the association representing European farmers and agri-food cooperatives.

Depending on the issues, **AVEC** also builds alliances with other European associations in the feed and food (meat) supply chain, such as **EFFAB** (the European Forum of Farm Animal Breeders), **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 body representing the European food and drink industry), **AHE** (Animal Health Europe), **EFPRA** (the European Fat Processors and Renderers Association), and **EUROCOMMERCE** (the association for retail, wholesale and international trade interests).

Since 2017, **AVEC** has been a part of the livestock policy coordination group together with several other associations in Brussels – **FEFANA, UECBV, EDA, FEFAC, EWEP, CLITRAVI, EFFAB, FUREUROPE, AHE** and **COPA-COGECA** – dealing with agriculture and food production. **AVEC** welcomes the activities of this platform which aims to spread good practice from the agriculture and food sector to a broader audience.

The cooperation and coordination with these European associations results in common positions. For example, guides to promote food safety or the welfare of poultry have been drafted in partnership to assist members with the implementation and application of European legislation.



AVEC, a member of the International Poultry Council

The International Poultry Council (IPC) was founded on 5 October 2005 on the initiative of AVEC together with associations in Argentina, Brazil, Canada, Chile, China, Egypt, the EU, Mexico, Thailand, Turkey and the USA.

Today, the IPC brings together 26 country members and 55 associate members, which are subdivided in producers/processors (22), suppliers (20) and end users (7). AVEC has a seat on the executive committee of the IPC.

IPC's objectives include encouraging the development and application of uniform and science-based international sanitary and marketing standards for poultry; promoting technical cooperation and the exchange of science-based principles between national authorities; promoting the transparency of governmental policies affecting poultry in all countries; and maintaining a dialogue with relevant international organisations such as the OIE, Codex Alimentarius, FAO, WHO and WTO.

As part of its process of increasing the participation of its members on key issues, the IPC has formed four working groups to address these issues and to propose policies and practices to bring before the membership for discussion and possible adoption. The four working groups cover:

- Animal health and welfare
- Processing and food safety
- Marketing and consumption
- Environment and sustainability

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

About the IPC

- Founded on 7 October 2005
- Official seat: 2300 West Park Place Boulevard, Stone Mountain, Georgia, USA
- Represents more than 90% of world broiler production and about 95% of world poultry trade
- www.internationalpoultrycouncil.com

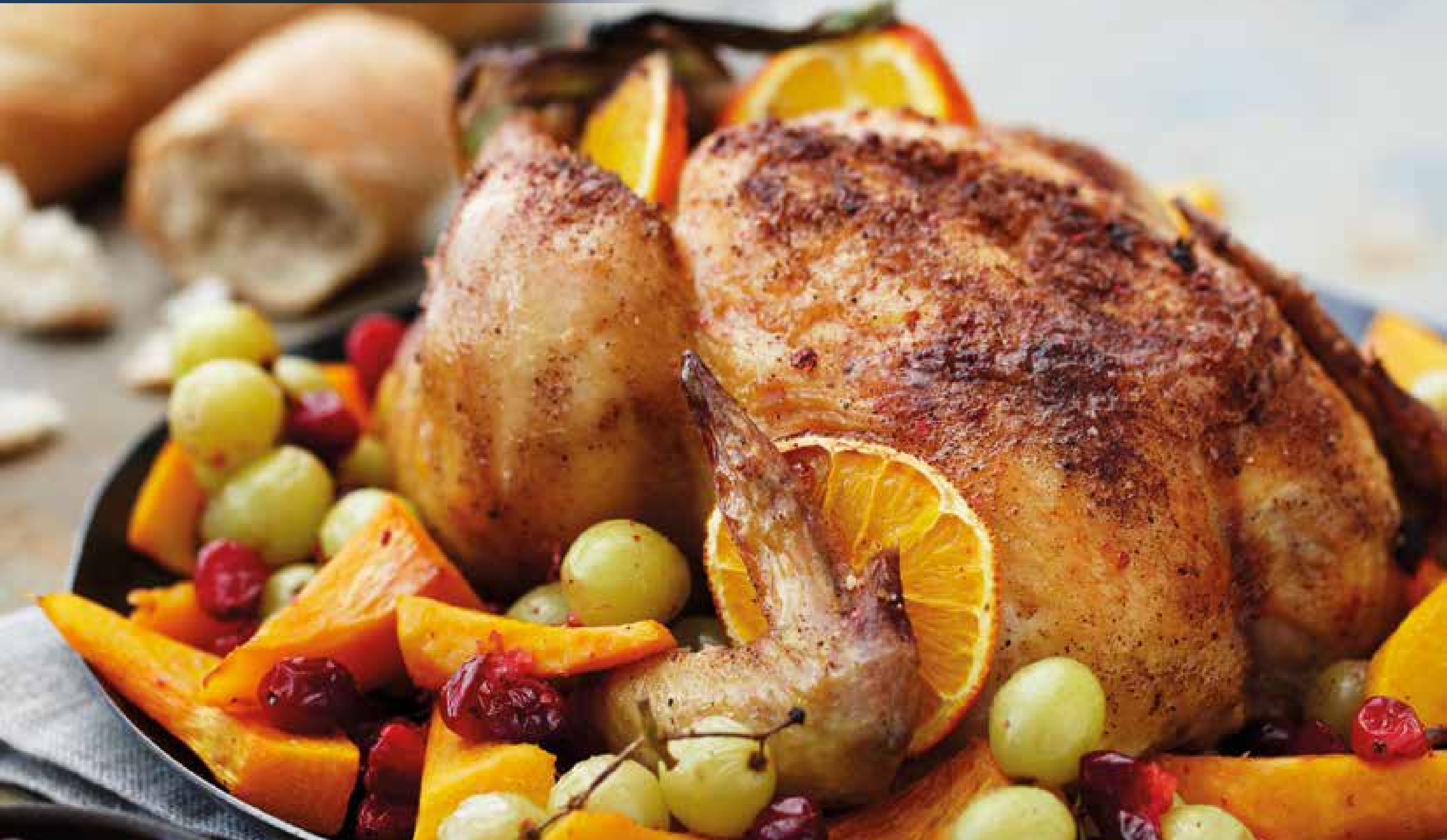
Executive committee:

- President: Mr James H. Sumner, USAPEEC
- Vice-president: Mr. Ricardo Santin, ABPA, Brazil
- Treasurer: Mr Robin Horel, CPEPC, Canada
- Members: Ms Yu Lu, CCNA, China; Dr. Vivien Kite, ACMF, Australia; Mrs Birthe Steenberg, AVEC, EU
- Associate members: Laura Villareal, Merck Animal Health (Suppliers group); Inma De La Vega, McDonald's Corporation (End users/consumers group); Stig Munck Larsen, Danish Agriculture & Food Council (Producers/processors group)
- Secretary general: Marilia Rangel

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, UAE, 2016
Lisbon, Portugal, 2016
Cartagena, Colombia, 2017
Banff, Canada, 2017
Noordwijk, Netherlands, 2018
Nanjing, China, 2018

AVEC focus



This section provides an overview of the main themes AVEC has worked on during 2017–2018. You will find a general description of the issues at stake, combined with a brief outline of AVEC's positions in relation to each issue, highlighting the strategy for future actions.

For more information on the different subjects, we invite you to visit our website: www.avec-poultry.eu

AVEC Working Group on Animal Health and Animal Welfare

Chair, Harald Schliessnig

This working group focuses on best practices regarding the health and welfare of animals. Animals are at the heart of our daily work and we are responsible for ensuring their well-being; our ultimate goal is disease prevention. The working group has held three meetings so far in 2018 and experts from the European Commission were invited to attend.

Avian influenza, 2017–2018

AVEC and the European poultry sector are committed to upholding the recognised biosecurity measures required to prevent avian influenza (AI) viruses from infecting our livestock.

Despite the decrease in cases, AI poses a serious threat to the poultry sector and still has the potential to heavily impact both animal health status and production in Europe. Outside the EU there have been cases of AI in Afghanistan, Iran, West Africa, Hong Kong, Taiwan and China. The latter, which has a huge problem, started a vaccination program against H7N9, because this strain is zoonotic. All these cases still have an impact on the export of poultry meat from these countries to third countries.

The Commission updated the control measures in the four EU countries affected this year. The designation of a new EU reference laboratory for AI and Newcastle disease will be necessary because of Brexit, and continued discussion on the definition of captive birds/backyard flock by the World Organisation for Animal Health (OIE) is ongoing. To this end, AVEC is continuing to ensure effective and proactive cooperation and liaison with the European institutions and national stakeholders.

OIE on avian influenza

AVEC welcomes the OIE general revision of the glossary definitions in the terrestrial code. From a European point of view, we suggest having a high level of consistency and consensus between the OIE definitions and those of Regulation (EU) 2016/429 of the European Parliament and of the Council of 9 March 2016 on transmissible animal diseases and amending and repealing certain acts in the area of animal health ('animal health law').

In particular regarding the definition of backyard flock, **AVEC welcomes the member countries' requests to clarify the use of the term 'backyard poultry' and encourages OIE to agree a definition that could be uniformly applied in all situations.**

Animal health law

The Commission is working on the conditions of the implementing and delegated acts of a new animal health law. AVEC welcomes the opportunity to actively participate in discussions with the European Commission and the member states to ensure a level playing field in Europe.

Use of antimicrobials

We are committed to reducing the risk of antimicrobial resistance (AMR) by minimising the use of antibiotics in poultry production. In recent years, antibiotic use in poultry meat production has been significantly reduced across the EU. AVEC and the EU poultry meat sector are committed to promoting the responsible use of antibiotics. Zero use is neither ethical nor sustainable and poultry farmers and veterinarians need to have antibiotics to maintain the health and welfare of birds. However, there is still work to be done to ensure that the critically important antimicrobials for human medicine are only used as a last resort. Discussion and action is needed from politicians and the general public to deal with the threat of AMR. AVEC believes in the 'One Health' approach: to improve health and welfare through collaboration and communication between human and veterinary medicine.

European animal welfare platform launched by the European Commission

The European animal welfare platform and the transport subgroups aim to provide information, recommendations and proposals for practices which help deliver better animal welfare during animal transport and slaughtering. The role of the platform is to assist the Commission with the development and exchange of coordinated actions on animal welfare. One of the topics discussed was the transport of animals during extreme weather conditions.

AVEC will attend future meetings and support this platform with its expertise, and will also contribute to the development of consistent factsheets extracted from the EC animal transport guides.

Broiler welfare report

In April 2018, the European Commission published its report on the application of Directive 2007/43EC and its influence on the welfare of chickens kept for meat production, as well as the development of welfare indicators.

The report points out that controls based on monitoring footpad dermatitis are best for demonstrating an improvement in animal welfare. Such controls are the most efficient and effective way of prioritising farm investigations. The European Food Safety Authority (EFSA) noted that member states are aware of the steps needed to implement monitoring systems for footpad dermatitis and that two thirds had already established such systems.

AVEC will cooperate with the Commission and member states to disseminate examples of good practice and guidance on farm management.

Veterinary medicinal products and medicated feed

New European regulations will soon be published, the main aim of which is to limit the use of antibiotics for animals that are not yet sick, but may run the risk of falling ill. These will define the role of both prophylaxis and metaphylaxis.

Certain critical antimicrobials will be set aside for the treatment of certain infections in humans in order to preserve their effectiveness.

AVEC welcomes this new legislation which will clearly set out EU standards which may benefit fairer international trade negotiations.

AVEC Working Group on Food Safety and Food Quality

Chair, Richard Griffiths

Consistent delivery of safe, wholesome, and nutritious poultry meat and poultry meat products is a massive undertaking that AVEC members do very well. Behind the meat on our supermarket shelves there is a raft of regulatory and technical excellence that helps produce the high quality and trusted food that European consumers expect. The AVEC Working group on food safety and food quality is the driving force and authoritative voice on processing issues for the sector.

Bringing together experts from across Europe, the working group engages with officials from the European Commission to help shape regulation, give consumers confidence in our standards, and ensure that our farm-to-fork methodology continues to be world-leading.

Official controls

The way in which official controls (the framework for producing and inspecting hygienic food production) are delivered is under review by the Commission. While people, in the form of inspectors and veterinarians, are part of everyday life in slaughterhouses and processing plants, the technology around them is improving rapidly. Production line speeds of over ten thousand birds per hour are now commonplace, so AVEC is advocating that inspection tasks must adapt accordingly.

Microbiological management

We know more now than ever before about the microbiological safety of meat, and techniques are being developed that minimise any risk. Old-style visual inspection, while useful for spotting animal health problems, cannot compete with microbiological inspection in managing this challenge.

A new control measure for campylobacter (a food-borne bacteria) was introduced this year, with an initial target of 40% of samples being allowed to register over 1,000 cfu/g. AVEC members have taken up the challenge and are working hard to understand how the reduction of this complex bug can be achieved. We expect results from the initial sampling data later in 2018.

Stunning methods

With animal welfare at the point of slaughter a key area of focus, it is interesting to see that a new stunning method has been approved by EFSA. Low atmospheric pressure stunning (LAPS) is now available for use, following trials in the USA, and AVEC members are currently assessing this new technology.

Mechanical deboning and fragmenting

AVEC is continuing to push the Commission to review its definition of mechanically separated meat. Legislation has not maintained pace with the developments in machinery technology, in that meat can now be recovered by mechanical techniques without adversely affecting its structure and quality. This has the potential to deliver more meat of higher quality, and also to improve sustainability of production.

Reducing waste

Usually described as ‘fifth quarter’, certain parts of a bird are not popular with European consumers, such as feet, heads, and offal. While still fit for human consumption, they fit into a category that allows them to be either exported or used in pet food. AVEC is working hard with the Commission to ensure that as much good quality ‘fifth quarter’ product remains economically viable, as any downgrading means it has to be disposed of.

Meat denomination

AVEC is participating in a discussion looking at names or terminology that are traditionally associated with meat. With a growth in vegetarian and vegan products and lifestyles, it is very important that consumers, whether meat-eaters or not, aren’t misled by the description or labelling of the products they buy. AVEC fully supports clear and unambiguous information for consumers.

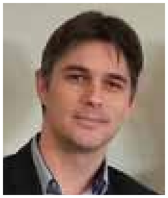
Origin labelling

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 information about the origin of the meat is not accessible to consumers.

EU poultry meat producers believe that consumers should have better access to information about the origin of meat, as well as the products offered by these channels, especially when meat is imported from third 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 recognise the complexity of such labelling, AVEC is advocating the mandatory labelling of all products containing more than 25% of poultry meat with the mention “EU” or “non EU”, along with the name of the country where the meat comes from outside the EU.

Turkey sector



Yann Brice, Chair, Turkey Working Group

Turkey production in Europe is still concentrated in six Member States (Poland, Germany, France, Italy, Spain and the United Kingdom). With more than 1.8 million tons produced, they represent 88% of the European production of turkey meat.

State of the turkey market

As expected, following the new avian influenza crisis in 2017, turkey production decreased, but slightly less than envisaged (-0.5%). This decline in production was more pronounced in Germany (-7.3%), France (-1.1%) and Italy (-1.8%). In contrast, Poland (+2.88%) and Spain (+7.4%) maintained significant growth in production. The United Kingdom has remained stable.

With an average consumption of 4kg per capita over the last two years in Europe, the consumption of turkey meat remains stable, but still struggles against a growing consumption of chicken meat. Restoring the image of turkey meat is essential if we want to keep it on our plates. Some member states have done this successfully. Our eyes must also turn a little further east, to Russia, where demand for turkey has been increasing over the last two years, especially in the big cities. We observe there the development of range of processed and cooked products, adapted to the country's consumption trends. Considering the will of the Russian government to develop meat production with long-term project planning and funding available to achieve it, we must remain vigilant.

Histomonosis – the fight is ongoing!

Despite our efforts, we are still not fighting effectively against histomonosis, which is a scourge for turkey producers. This disease is a serious and permanent threat to the health and welfare of animals worldwide, particularly in the EU. An EFSA technical meeting on histomonosis in 2013 concluded that coordinated assistance from all stakeholders was needed to help alleviate the suffering of animals and to seek appropriate control measures.

For many years, histomonosis has been controlled by effective drugs, but in recent years, these have been banned or withdrawn from the market, resulting in an increase in the number of incurable epidemics, a deterioration of birds' welfare and considerable economic losses for farmers and businesses. In some cases, the social impact for the farmer is significant. Many of them, after having been hit by histomonosis, reconsider their desire to rear turkey, not for economic reasons, but because of their inability to prevent their animals from suffering.

The University of Vienna, in partnership with AVEC, took the initiative to create an online (European) histomonosis case-finding form (blackheaddisease.info) to consolidate a globalised database of all histomonosis cases identified. This database is providing real added value in the knowledge and monitoring of this disease, but it cannot be effective without the active participation of the stakeholders. If everyone (veterinarians, poultry farmers, companies, etc.) is involved and agrees to contribute, its value will only be multiplied. Let's be collective.

Societal expectations are not just a trend

Societal expectations are an increasingly important factor in livestock farming. We are now going beyond the simple fashion effect of a diet. Farmers are regularly targeted by animal welfare organisations, which use diverse strategies to create difficulties for them, including illegal ones, such as breaking into poultry houses.

Some of these organisations have an aura of respectability, and environmentalists, media and politics are relaying these issues and deviations from a standard they have set themselves. Rare are the European countries today which do not have to deal with the issues around beak trimming, mass production, stocking density, antimicrobial resistance, animal suffering, pododermatitis, mortality or welfare during slaughter. To avoid stigmatising production and farming methods, and to put a stop to overstatements, it is important to consider these changes in practices rationally. The revision of the European turkey guide is certainly a good one.

AVEC Working Group on Sustainable Production

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

Through different initiatives and projects at EU and international level, AVEC has participated in the efforts made by the poultry meat sector to improve its environmental performance. However, it is essential that any sustainability policy is viable and therefore the economic, social and environmental components need to be well balanced.

Poultry meat has the best feed conversion ratio of the different meat species and therefore produces lower emissions than other meat sectors. Despite these advantages, the poultry sector is continuously working to increase its efficiency to address the challenge of climate change.

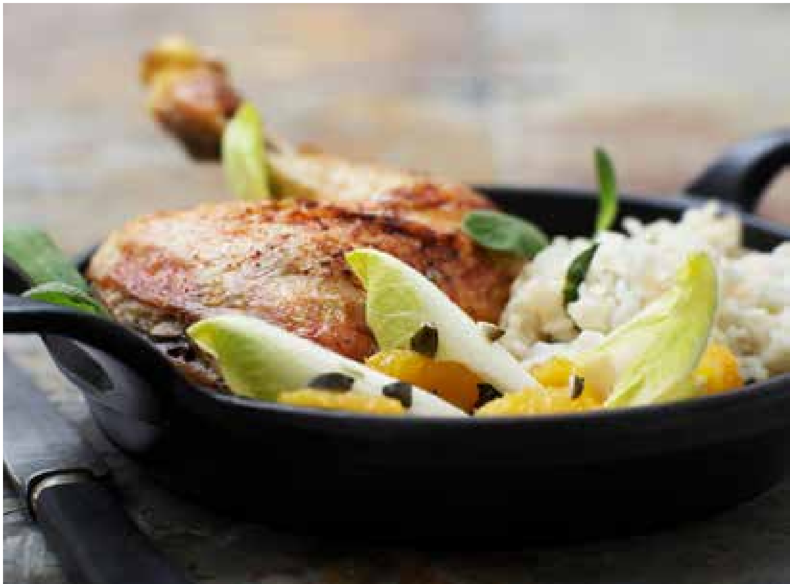
The production of food – and meat in particular – is often blamed for wasting natural resources and for its negative impact on the environment.

It has been suggested that conventionally indoor-reared poultry may be less sustainable than more extensive production systems such as free-range and organic poultry.

In fact, due to better conversion of the feed intake into protein, the meat from conventionally indoor-reared poultry has lower emission levels and can be offered at a price that is affordable for more consumers.

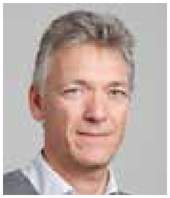
This should be highlighted in the promotion of sustainable meat production since the theme of sustainability is not only linked to environmental issues – but also to secure access to food (food security) and to the economy of the sector.

In the context of the growing demand for food, the focus should be on both satisfying societal demands and guaranteeing access to high-quality and affordable food for all consumers.



AVEC Working Group on Trade

The Working Group on Trade advocates for a level playing field with all trading partners



Chair, Stig Munck Larsen

The overall aim of the working group on trade is:

- to support and update the board on trade issues
- to take positions and policy directions to defend the interests of the EU poultry sector
- to ensure that EU poultry producers can operate in a competitive environment vis-a-vis third countries, based on a level playing field approach

Global free trade in general appears to be in a difficult situation and under pressure from the latest trade restrictions on a wide range of products, initiated by the USA against its major trading partners. The risk of a chain reaction of retaliatory measures can severely impact sectors and create an unhealthy trade diversion characterised by excess global supply, increasing the local competition and leading to negative price pressure.

Poultry meat, being the most traded meat, could be significantly exposed to trade diversion if a global trade war escalates into increased levels of protectionism. What has taken decades to build up in terms of a rules-based multilateral trade system under the WTO, unfortunately may only take a short time to break down if agreements are not respected, and countries take unjustified trade measures that are not WTO compliant.

Regarding poultry meat, we have already seen numerous trade measures being imposed globally, both in the form of direct increases of import duty and as non-tariff barriers related to sanitary and phytosanitary (SPS) issues. In addition, the rules on halal have become increasingly important in Muslim communities, with new sets of regulations on food safety in regions like the Gulf States. The challenge for EU poultry products for these destinations is not in complying with the food safety requirements, but the need to operate in an informed and transparent way without being faced with obstacles to trade.

Main trade issues in 2017–18

In the last year the Working group on trade has been extraordinarily busy with five major topics:

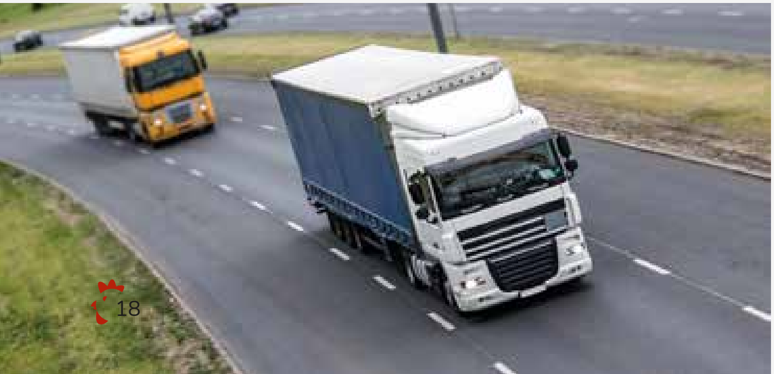
1. Trade restrictions from South Africa. The South African safeguard investigation against imports from the EU led to a provisional duty of 13.9% in December 2016, on top of the existing anti-dumping duty imposed on imports from the UK, Germany and the Netherlands.

The provisional safeguard duty has been terminated and no definitive safeguard measures have yet been imposed. Instead, SPS measures have been initiated against several EU exporting countries due to outbreaks of avian influenza (AI), without respecting the World Organisation for Animal Health (OIE) principles of regionalisation. The South African authority has informed importers that lifting these SPS measures requires an onsite inspection in the countries concerned – a process which is still ongoing and can be expected to last some time, due to claimed lack of resources in the South African administration.

In August, South Africa lifted the SPS ban on some EU member states, while other members are still waiting for this clearance. At the same time the SACU (South Africa Custom Union) Council of Ministers has decided on a draft proposal to impose a safeguard duty of 35.3% which will depreciate over four years before the measure lapses, unless it is decided to renew it.

AVEC finds it unacceptable to further delay the opening of the South African market to EU exports in line with the spirit of the EU-South African (SACU) Economic Partnership Agreement (EPA), that provides for free market access for poultry meat. AVEC is working closely with the EU Commission to find a viable solution that opens the market in respect of the EPA and the recovery of the South African poultry sector. An agreement can only be reached provided that South Africa removes applied import measures and respects the OIE recommendation on regionalisation.

2. Exploitation of loophole in Ukrainian agreement in DCFTA. AVEC is seriously concerned about the unintended loophole Ukrainian exporters have utilised in the Deep and Comprehensive Free Trade Areas (DCFTA) agreement. The EU poultry sector was treated as a sensitive sector in the free trade negotiation and for that reason tariff-rate quotas (TRQs) were granted to Ukraine. The use of a very particular cut which has never been traded or demanded in significant commercial trade clearly indicates that exporters have speculated on such a tariff-circumvention against the political spirit of the trade agreement. An export under this tariff line with zero duty increased from zero to 27.000 tonnes in 2017 alone, and without any upper limits. This is extremely harmful for the EU poultry meat sector, especially in the context of non-respect of the commitment made by the Ukrainian authorities on the approximation of their regulations (particularly on animal welfare) with EU regulations.



AVEC is confident that the EU Commission will ensure ordinary trade will take place, respecting the spirit of the agreement, while imports will fully comply with the same strong EU requirements that EU producers must comply with.

3. Imports from Brazil and Mercosur negotiations. AVEC is satisfied with the measures taken against Brazil due to the meat scandal and encourages the Commission to continue a strict test and control programme on imports of poultry meat which preferably should cover all imports from Brazil – and other countries.

AVEC is deeply concerned about the possible outcome of the Mercosur free trade negotiations, where almost 90.000 additional tonnes have been offered, even though poultry is being treated a sensitive sector. A further concern is that any new concession will not be part of the TRQ split following Brexit. In other words, additional TRQs in Mercosur will be solely allocated to the EU27. AVEC believes that 'enough is enough' and a further concentration of TRQs will be detrimental to the interests of the EU poultry sector.

4. Consequences of Brexit. As for the EU internal market, the UK withdrawal from the EU as of 31 March 2019 is a factor that could have a significant impact on the EU poultry sector for both parties. At this point in time it's still unclear if the withdrawal will come out as a hard or soft Brexit, which will be decisive for the future trade cooperation in terms of tariff rates and equivalence rules on food safety and animal welfare etc. The EU poultry sector is advocating strongly for a status quo in a future free trade agreement which provides for an unchanged functioning of the internal market with application of EU regulations and no border control or customs clearance.

5. Halal requirements. AVEC has been involved in the new halal requirements in the Gulf Cooperation Council (GCC) area lead by UAE. The main challenge not only for EU exports but all global imports into mainly UAE and Saudi Arabia is the requirement not to use any kind of stunning methods before the slaughtering of birds. AVEC is working closely with the International Poultry Council (IPC), on changing the ban on stunning allowing for the use of reversible stunning.

Bilateral free trade agreements with caution

On a positive note, AVEC is strongly in support of the free trade agreements the EU has recently negotiated with trading partners like Japan, Vietnam and Mexico. In particular, the trade deal with Mexico could potentially open a completely new market for leg quarters and mechanically separated meat (MSM) which has become more important, considering the possible trade war with USA in the NAFTA free trade agreement.

AVEC is concerned when bilateral free trade agreements are negotiated against the interests of the EU poultry sector, allowing for more imports to the detriment of the creation of growth and jobs in the EU. The EU poultry sector being traded off against other sectors as a precondition for finalising trade deals is not acceptable. Poultry meat should always be treated as a sensitive product in trade negotiations when partners prefer exports of poultry meat and, in any case, it should be clearly stated that compliance with EU legislation on food safety, animal health, environment, and animal welfare is an absolute requirement.

AVEC is also concerned when trading partners act against the spirit of ratified free trade agreements. Lessons learned from the implementation of free trade agreements clearly suggest that EU stakeholders need to be in very close dialogue with the Commission, when technicalities are being concluded with partners, to limit the risk of trade being done against the spirit of the agreements.

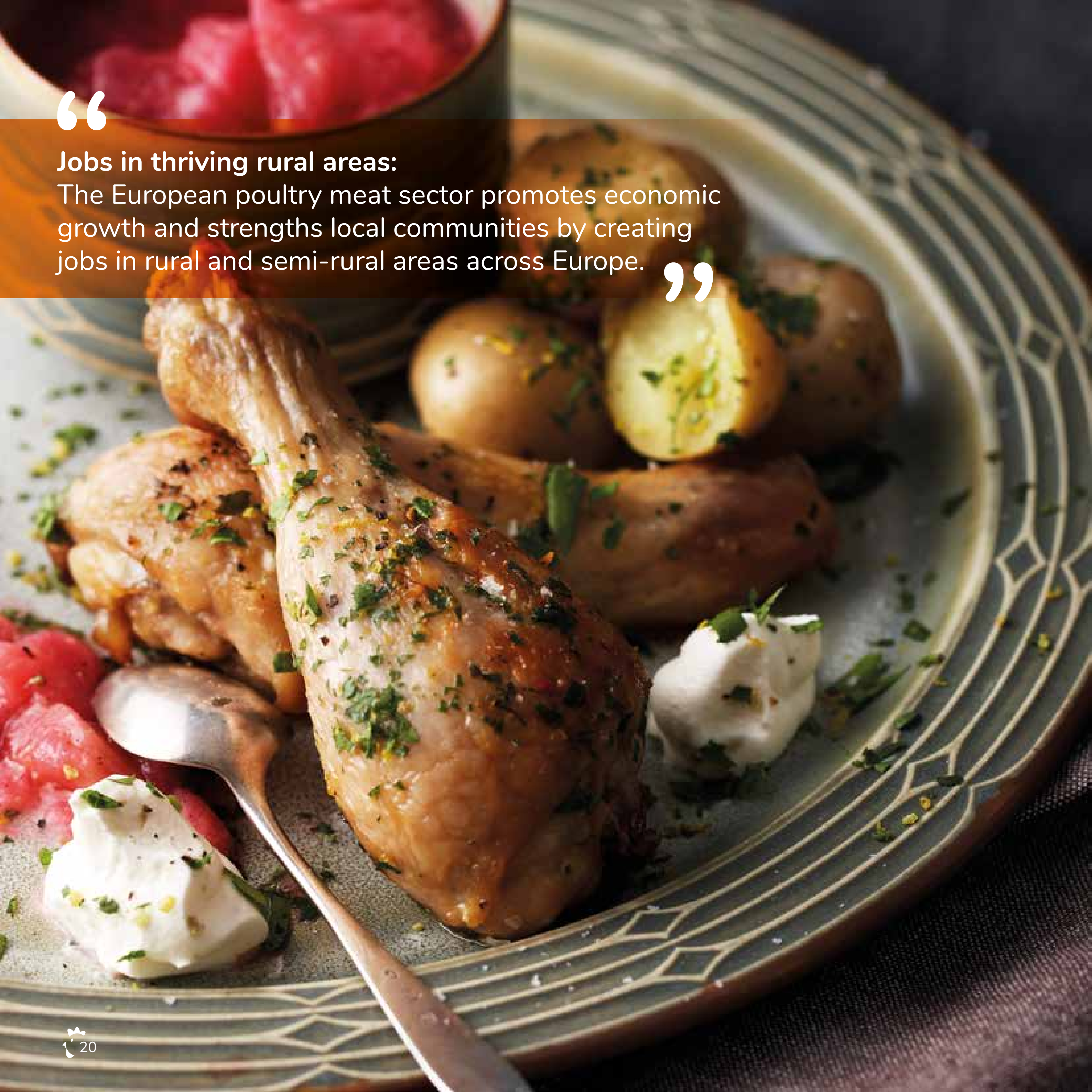
The outlook for trade in poultry

The outlook for international trade in poultry meat is still good due to a stable increase in global consumption and demand. The stability in trade flows is more uncertain and a level of volatility and trade diversion might be expected in the coming years. This may come from trade restrictions and an increasing demand for higher levels of self-sufficiency, especially among countries with a rising middle-class that has an increasing appetite for poultry meat.

Several key emerging poultry meat consuming countries have suggested that an import imbalance is present in the sense that the import share of poultry meat consumption is too high. A strategic policy in countries like South Africa, Saudi Arabia, Algeria, Egypt, Russia and China to limit the import of poultry meat could have a significant impact on the global trade in poultry meat and create trade diversion and market instability if several thousand tonnes of poultry meat has to find other destinations, putting those markets under pressure. This could be the time to create a new chain reaction, forcing those importing countries to initiate trade measures on imports to defend and preserve our own poultry production.

Only the future will tell if an overcapacity in global exports has been built up, not corresponding to the global increase in poultry consumption and the demand for imports. An overcapacity in exports is by nature a threat to the global poultry trade and risks undermining market stability to the detriment of the importing and exporting countries. The global poultry sector is only viable if equilibrium is established between global demand and supply.

The Working group on trade has a great interest in engaging all AVEC members to contribute actively in effectively facilitating the best factual grounds for decisions taken by the AVEC board.



Jobs in thriving rural areas:
The European poultry meat sector promotes economic growth and strengths local communities by creating jobs in rural and semi-rural areas across Europe.

Statistics

1. EU balance sheet for poultry meat (‘000 tons carcass weight)

	2012	2013	2014	2015	2016	2017
Gross indigenous production	12.715	12.803	13.281	13.799	14.485	14.675
Export of meat	1.324	1.311	1.361	1.370	1.486	1.478
Import of meat	841	791	821	855	882	829
Consumption	12.223	12.274	12.731	13.275	13.874	14.020
Consumption per capita, kg	21,3	21,3	22,1	22,9	23,9	24,1
Self-sufficiency, %	104,0	104,3	104,3	104,0	104,4	104,7

Note: Partial provisional or estimated.
Source: EU-Commission, so the gross indigenous production is different to table No. 2.

“The European poultry meat sector is an example of solid European excellence in farming and food production.”

Production (updated 2017)

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

	2012	2013	2014	2015	2016	2017
Austria	125	121	122	122	123	129
Belgium / Luxembourg	411	389	433	453	461	465
Bulgaria	108	98	102	106	109	111
Croatia	74	68	68	83	81	83
Cyprus	25	24	24	23	24	25
Czech Republic	181	171	175	175	177	178
Denmark	180	168	173	147	156	159
Estonia	17	18	19	20	20	21
Finland	108	111	113	116	121	131
France	1.859	1.842	1.827	1.828	1.829	1.855
Germany	1.695	1.714	1.775	1.807	1.817	1.717
Greece	118	180	190	189	173	175
Hungary	488	515	543	577	620	599
Ireland	124	129	129	125	132	134
Italy	1.261	1.259	1.261	1.321	1.388	1.372
Latvia	24	26	29	29	30	31
Lithuania	85	93	100	111	112	115
Malta	4	4	4	4	4	5
Netherlands	838	848	941	1.057	1.097	1.097
Poland	1.712	1.798	2.022	2.173	2.871	3.110
Portugal	324	324	327	336	343	346
Romania	335	360	382	353	370	417
Slovakia	64	64	59	58	66	66
Slovenia	59	57	60	59	67	69
Spain	1.251	1.299	1.390	1.453	1.526	1.511
Sweden	116	128	137	147	155	163
United Kingdom	1.607	1.606	1.587	1.663	1.739	1.789
EU	**13.191**	**13.413**	**13.991**	**14.534**	**15.611**	**15.872**

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

Production (updated 2017)

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

	2012	2013	2014	2015	2016	2017
Argentina	1.903	1.921	1.934	2.080	2.101	2.107
Brazil	13.087	12.645	12.914	13.523	13.865	13.992
Chile	669	676	663	700	725	730
China	18.034	18.266	17.791	18.403	17.483	16.450
India	2.309	2.358	2.546	2.666	2.872	2.993
Japan	1.459	1.458	1.494	1.517	1.535	1.519
Mexico	2.812	2.825	2.899	2.981	3.039	3.061
Russia	3.625	3.805	4.122	4.489	4.561	4.580
Saudi Arabia	568	578	626	682	710	692
Switzerland	76	80	85	87	91	92
South Africa	1.496	1.504	1.540	1.571	1.548	1.543
Turkey	1.737	1.773	1.912	1.920	1.916	1.895
Ukraine	1.060	1.151	1.227	1.227	1.247	1.259
USA	19.944	20.235	20.450	20.532	20.967	21.316
World Production	**107.004**	**108.227**	**110.442**	**114.337**	**116.845**	**118.080**

Notes: 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

> "Poultry meat could be significantly exposed to trade diversion if a global trade war escalates into increased levels of protectionism."

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

	2012	2013	2014	2015	2016	2017	from third countries
Poultry Meat[1]							
Austria	104	100	101	102	113	105	0
Belgium / Luxembourg	222	229	240	252	235	232	0
Bulgaria	109	88	98	103	102	111	0
Croatia	16	18	18	20	21	19	0
Cyprus	8	10	9	10	11	11	0
Czech Republic	101	96	99	114	117	117	.
Denmark	76	91	69	66	58	63	1
Estonia	18	19	18	18	21	19	0
Finland	5	5	7	9	9	10	.
France	383	381	396	420	428	428	2
Germany	514	571	597	614	659	655	18
Greece	72	76	79	72	79	80	0
Hungary	45	52	50	36	40	53	1
Ireland	65	72	82	104	90	78	1
Italy	60	63	66	66	59	70	3
Latvia	29	30	30	28	34	33	0
Lithuania	31	33	33	37	35	39	0
Malta	4	5	5	6	6	6	.
Netherlands	450	431	429	396	392	504	75
Poland	44	40	38	36	46	56	3
Portugal	46	53	59	64	67	69	.
Romania	111	96	119	125	137	142	6
Slovakia	32	57	52	49	53	58	8
Slovenia	14	15	15	17	18	17	0
Spain	122	127	116	155	163	181	23
Sweden	43	46	49	52	55	58	0
United Kingdom	393	396	387	409	434	423	20
EU	**184**	**149**	**152**	**155**	**157**	**161**	
Salted meat[2]							
Germany	37	38	47	47	50	39	
Netherlands	154	160	173	170	175	142	
United Kingdom	44	50	55	59	60	45	
EU from third countries	**212**	**227**	**256**	**265**	**277**	**211**	
Preparations of poultry[3]							
EU from third countries	**442**	**397**	**380**	**387**	**401**	**390**	

Notes: 1. Without preparations, livers, salted meat and live poultry. 2012 partly preliminary. Data in the Eurostat trade statistics and trade balance are slightly 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.

Trade

5. Export of poultry meat by EU countries ('000 tons[1])

	2012	2013	2014	2015	2016	2017[2]	to third countries
Austria	58	55	60	58	57	61	2
Belgium / Luxembourg	488	473	481	538	511	593	170
Bulgaria	47	36	41	39	40	43	3
Croatia	5	4	6	7	8	8	4
Cyprus	2	1	1	0	1	1	1
Czech Republic	31	30	31	35	37	34	1
Denmark	82	77	77	67	74	86	36
Estonia	6	7	6	6	7	7	1
Finland	17	18	16	17	16	13	5
France	526	519	477	477	432	424	237
Germany	501	510	543	507	493	473	50
Greece	23	22	26	21	21	29	12
Hungary	189	195	204	202	222	177	35
Ireland	63	52	59	69	74	82	26
Italy	149	147	149	154	177	165	58
Latvia	9	14	15	11	13	18	3
Lithuania	39	43	46	49	47	54	14
Malta	0	0	0	0	1	1	0
Netherlands	1.061	1.073	1.223	1.150	1.258	1.447	356
Poland	528	587	714	841	1.015	1.114	289
Portugal	18	19	20	25	27	41	12
Romania	79	70	59	66	57	59	7
Slovakia	34	36	37	33	30	20	1
Slovenia	18	19	20	17	19	22	8
Spain	129	137	178	198	230	215	82
Sweden	51	52	60	65	76	74	7
United Kingdom	296	350	352	299	296	335	77
EU	**1.275**	**1.269**	**1.331**	**1.350**	**1.507**	**1.497**	
which were							
Chicken	1.091	1.096	1.161	1.172	1.270	1.312	
Turkey	154	142	138	129	142	140	
Preparations of poultry[3]							
EU to third countries	50	42	40	38	39	41	

Notes: 1. Without preparations, livers, salted meat. 2. 2017 partly preliminary. 3. Tariff items 1602 31 .. 1602 32 .. and 1602 39
Source: MEG to Eurostat and national statistics.

Trade

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

	2012	2013	2014	2015	2016	2017
Total imports of poultry meat						
Switzerland	46	45	47	47	46	45
Imports of broiler meat						
Angola	301	321	365	240	.	.
China	254	244	260	268	430	450
Hong Kong	300	272	299	312	344	390
Iraq	610	673	698	625	661	610
Japan	877	854	888	936	973	995
Russian Federation	491	494	400	204	120	110
Saudi Arabia	750	838	762	863	886	780
United Arab Emirates	223	217	225	277	296	340
Exports of broiler meat						
Argentina	295	334	278	187	158	185
Belarus	105	105	113	135	145	145
Brazil	3508	3482	3558	3841	3889	4000
Chile	93	88	87	99 .		.
China	411	420	430	401	386	400
Thailand	538	504	546	622	690	770
Turkey	284	337	379	321	296	360
Ukraine	74	141	167	159	236	300
USA	3.299	3.332	3.310	2.867	3.014	3.091

Sources: MEG to USDA and national data.

"AVEC strongly supports the free trade agreements the EU has recently negotiated with trading partners like Japan, Vietnam and Mexico."

Consumption

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

	2012	2013	2014	2015	2016	2017
Austria	21,1	20,6	21,1	21,3	21,6	21,8
Belgium / Luxembourg	.	.	.	.	.	.
Czech Republic	23,0	22,5	22,5	23,0	23,2	23,5
Denmark	.	.	24,0	24,7	24,5	23,7
Finland	17,4	17,8	18,7	19,1	19,9	21,0
France	25,7	26,0	26,5	27,1	26,5	26,5
Germany	19	19,4	19,5	20,1	20,8	20,9
Greece	20,7	21,2	22,3	22,1	21,4	20,9
Hungary	29,5	30,0	30,5	30,8	31,1	32,0
Ireland	30,0	30,3	30,4	31,0	30,8	29,9
Italy	19,0	19,0	18,8	19,7	20,3	20,8
Latvia	20,0	19,5	19,5	22,0	23,0	22,5
Lithuania	22,7	23,0	22,8	22,9	23,5	24,0
Netherlands	22,0	22,3	22,5	22,1	22,2	22,3
Poland	25	26,5	28,2	27,1	28,0	29,0
Portugal	33,4	34,1	35,1	36,2	37,0	36,2
Slovakia	19,8	20,0	19,8	19,9	20,1	21,0
Spain	30,0	30,5	30,8	31,0	31,4	31,7
Sweden	17,6	18,8	19,8	20,0	20,9	21,4
United Kingdom	28,7	28,7	28,5	27,3	28,7	28,5
EU	**21,2**	**21,3**	**22,1**	**22,9**	**23,9**	**24,1**
Switzerland	17,7	17,9	18,6	19,0	18,9	18,5

Note: Partial provisional or estimated.
Sources: MEG according to EU Commission, national data, FAO and Eurostat.

Consumption

8. Self-sufficiency in poultry meat (%)

	2012	2013	2014	2015	2016	2017
Austria	70	70	67	67	68	69
Belgium / Luxembourg	.	.	.	.	.	.
Czech Republic	72	72	72	69	69	68
Denmark	.	.	.	.	.	.
Finland	107	107	106	107	113	116
France	110	107	105	104	104	104
Germany	111	110	112	110	106	99
Greece	79	78	79	79	75	78
Hungary	138	137	139	143	140	135
Ireland	100	100	99	95	89	103
Italy	108	107	107	107	109	107
Latvia	54	62	64	65	64	70
Lithuania	112	112	115	112	112	115
Netherlands	228	227	249	283	291	288
Poland	180	178	189	211	270	284
Slovakia	78	72	75	75	73	70
Spain	100	100	104	103	105	102
Sweden	97	96	98	99	103	105
United Kingdom	89	92	93	94	93	95
EU	**104**	**104**	**104**	**104**	**104**	**105**

Note: Partial provisional or estimated.
Sources: MEG according to EU Commission, national data, FAO and Eurostat.

"The outlook for international trade in poultry meat is good due to a stable increase in global consumption and demand."

Broiler

9. Broiler production in EU and third countries (gross domestic production ('000 tons carcass weight)

	2012	2013	2014	2015	2016	2017
Austria	89	89	91	93	108	112
Belgium / Luxembourg	401	380	425	445	434	435
Bulgaria	86	77	80	85	86	88
Cyprus	25	23	23	23	24	25
Czech Republic	158	155	161	160	159	160
Denmark	175	168	173	146	155	158
Estonia	15	17	17	20	20	21
Finland	99	104	106	108	113	123
France	1.091	1.146	1.116	1.139	1.133	1.163
Germany	1.160	1.220	1.280	1.285	1.285	1.250
Greece	116	178	188	187	171	175
Hungary	280	305	329	365	394	402
Ireland	116	117	118	110	120	122
Italy	861	863	872	929	981	975
Croatia	61	58	57	69	67	69
Latvia	25	27	29	30	30	31
Lithuania	79	87	94	105	105	106
Malta	4	4	4	4	4	4
Netherlands	738	750	926	1.046	1.081	1.081
Poland	1.305	1.395	1.568	1.699	2.324	2.560
Portugal	258	259	261,6	271	278	281
Romania	325	310	310	350	360,45	405
Slovakia	66	68	69	70	57	60
Slovenia	49	47	47	54	62	65
Spain	1.063	1.041	1.053	1.203	1.268	1.237
Sweden	80	90	103	113	136	151
United Kingdom	1.322	1.391	1.383	1.456	1.535	1.586
EU	**10.055**	**10.374**	**10.892**	**11.565**	**12.491**	**12.844**
Argentina	2.014	2.060	2.050	2.080	2.055	2.086
Brazil	12.645	12.308	12.692	13.547	13.523	13.118
China	13.700	13.350	13.000	13.400	12.300	11.600
India	3.160	3.450	3.725	3.900	4.200	4.400
Indonesia	1.540	1.550	1.565	1.625	1.640	1.640
Iran	1.956	1.962	1.962	1.962	1.963	1.962
Mexico	2.958	2.907	3.025	3.175	3.275	3.400
Russia	2.830	3.010	3.260	3.600	3.730	3.870
South Africa	1.489	1.497	1.497	1.497	1.500	1.500
Thailand	1.550	1.500	1.570	1.700	1.780	1.900
USA	16.621	16.976	17.306	17.971	18261	18.596
World	**94.020**	**97.620**	**100.670**	**103.801**	**107.143**	**108.429**

Notes: Mainly provisional or estimated. Partly contradictory with official information on poultry meat production. **Source:** MEG to USDA, FAO and national figures.

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

	2012	2013	2014	2015	2016	2017
Austria	13,3	13,3	13,9	14,1	14,3	14,7
France	15,8	16,2	16,9	17,2	18,0	18,8
Germany	11,1	11,7	11,8	12,4	12,9	13,2
Italy	11,7	11,7	11,9	12,5	12,5	.
Netherlands	18,4	18,5	.	.	.	.
Portugal	.	.	26,0	.	.	.
United Kingdom	22,0	22,5	22,5	22,9	23,2	.
EU	**17,1**	**17,2**	**18,0**	**18,5**	**19,2**	**19,4**
Third countries						
Argentina	42,0	41,9	41,3	43,6	43,4	43,1
Brazil	46,0	43,2	44,3	45,2	43,5	44,2
China	9,8	9,5	9,2	9,5	8,8	8,3
India	2,5	2,7	2,9	3,0	3,2	3,3
Japan	17,4	17,4	17,6	18,1	18,7	19,0
Mexico	29,5	30,1	29,8	31,5	31,8	32,1
South Africa	30,2	29,5	29,1	30,1	30,1	30,3
USA	42,6	43,4	44,2	47,2	47,6	48,0

Note: Partial provisional or estimated
Source: MEG, according to its own and national estimates, and national information.

“AVEC’s members represent 95% of the EU poultry meat production.”

Turkey

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

	2012	2013	2014	2015	2016	2017
Austria	26	22	21	25	25	25
Belgium / Luxembourg	5	5	5	3	3	3
Bulgaria	1	1	1	1	0	0
Croatia	12	9	10	13	13	13
Cyprus	0	0	0	0	0	0
Czech Republic	7,8	5	5	6	9	9
Denmark	2	2	2	1	1	0
Finland	8	7	7	8	8	8
France	415	386	362	355	373	369
Germany	392	384	392	396	407	377
Greece	3	3	3	3	3	3
Hungary	95	89	93	97	101	101
Ireland	9	8	7	10	8	7
Italy	315	314	310	313	331	325
Malta	0	0	0	0	0	0
Netherlands	28	28	28	28	28	28
Poland	288	280	280	312	416	428
Portugal	39	39	37	38	38	39
Romania	10	10	11	12	10	12
Slovakia	0	0	0	0	1	1
Slovenia	4	4	4	5	5	5
Spain	111	177	181	171	187	201
Sweden	4	4	4	4	4	4
United Kingdom	196	187	172	177	164	164
EU	**1.970**	**1.934**	**1.939**	**1.977**	**2.133**	**2.121**
Brazil	510	520	470	480	596	.
Canada	161	168	168	167	169	169
Mexico	21	17	19	19	17	17
Russia	100	100	105	.	.	.
South Africa	53	53	53	.	.	.
USA	2.707	2.634	2.611	2.552	2.713	2.712
World	**5.839**	**5.651**	**5.640**	**5.659**	**6.061**	**6.080**

Note: Partial provisional or estimated,
Source: MEG, according to its own and national estimates, and national information.

Turkey

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

	2012	2013	2014	2015	2016	2017
Austria	6,2	5,9	5,8	5,5	5,5	5,5
France	5,3	5,2	5,1	4,6	4,8	4,7
Germany	6,1	5,8	5,9	5,9	6,0	5,9
Italy	4,8	4,8	4,9	4,9	.	.
Netherlands	1,0	1,1	1,1	1,1	.	.
Portugal	.	5,0	4,9	.	.	.
United Kingdom	4,2	4,2	4,1	.	.	.
EU	**3,8**	**3,7**	**3,7**	**3,7**	**4,0**	**4,0**
Third Countries						
Brazil	1,7	1,7	1,8	.	.	.
Canada	4,1	4,1	4,1	.	.	.
Mexico	1,4	1,4	1,4	.	.	.
Russia	0,8	0,8	0,8	.	.	.
USA	7,3	7,3	7,2	7,2	7,6	7,5

Note: Partial provisional or estimated,
Source: MEG, according to its own and national estimates, and national information.

> “With an average consumption of 4kg per capita over the last 2 years in Europe, the consumption of turkey meat remains stable.”

Duck

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

	2012	2013	2014	2015	2016	2017
Austria	0,1	0,1	0,1	0,1	0,1	0,1
Belgium / Luxembourg	0,1	0,0	0,1	0,1	0,1	0,1
Denmark	3,5	3,5	3,5	4,0	1,0	1,0
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	240,4	223,3	230,0	231,6	206,2	203,6
Germany	63,3	51,3	51,1	50,3	48,5	40,5
Greece	0,2	0,1	0,1	0,1	0,2	0,2
Ireland	4,2	4,0	4,5	5,1	5,2	6,0
Italy	14,0	13,0	11,0	9,0	6,9	6,0
Netherlands	17,0	17,0	15,0	16,0	16,0	16,0
Portugal	8,5	8,0	9,7	9,9	10,0	10,0
Spain	6,0	5,0	5,0	2,0	4,1	4,0
Sweden	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom	32,1	30,4	32,1	29,2	30,0	29,0
Bulgaria	21,2	21,0	22,0	20,3	22,5	23,0
Cyprus	0,0	0,0	0,0	0,0	0,0	0,0
Czech Republic	4,2	4,8	7,3	8,0	9,0	9,0
Estonia	.	.	.	.	.	.
Hungary	69,6	76,5	79,8	84,0	79,5	62,0
Latvia	.	.	.	.	.	.
Lithuania	0,3	0,3	0,1	0,1	0,1	0,1
Malta	.	.	.	.	.	.
Poland	15,7	28,5	41,4	44,6	59,1	57,0
Romania	.	.	.	.	.	.
Slovakia	0,4	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
EU	**509,0**	**496,0**	**532,0**	**523,0**	**510,0**	**470,0**
World	**4359,5**	**4424,6**	**4373,5**	**4383,2**	**4534,6**	**.**

Notes: Partial provisional or estimated (base = gross domestic production), official data on duck production from only a few countries. Partly contradictory towards official information on poultry meat production.
Source: MEG to FAO, USDA and national data.

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Projections

14. Poultry meat market projections for the EU, 2018–2030 (‘000 tonnes carcass weight equivalent)

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Gross indigenous production	14.823	14.909	14.975	15.030	15.104	15.158	15.186	15.204	15.239	15.255	15.297	15.329	15.349
of which EU-15	10.858	10.858	10.868	10.867	10.875	10.879	10.887	10.882	10.883	10.883	10.885	10.886	10.887
of which EU-N13	3.965	4.051	4.107	4.163	4.228	4.279	4.299	4.322	4.355	4.372	4.413	4.442	4.462
Consumption	14.172	14.298	14.380	14.452	14.519	14.557	14.565	14.547	14.546	14.535	14.569	14.589	14.597
of which EU-15	11.362	11.445	11.527	11.570	11.617	11.634	11.633	11.611	11.613	11.614	11.651	11.677	11.684
of which EU-N13	2.810	2.853	2.853	2.882	2.902	2.923	2.932	2.936	2.933	2.921	2.918	2.912	2.913
per capita consumption (kg r.w.e.)*	24,3	24,4	24,5	24,6	24,7	24,8	24,8	24,8	24,8	24,7	24,8	24,8	24,8
of which EU-15	24,4	24,5	24,6	24,6	24,7	24,7	24,7	24,6	24,6	24,5	24,6	24,6	24,6
of which EU-N13	23,8	24,3	24,3	24,6	24,9	25,2	25,3	25,5	25,5	25,5	25,6	25,7	25,8
Imports (meat)	867	925	960	986	993	996	996	994	992	992	994	994	995
Exports (meat)	1.518	1.536	1.555	1.564	1.577	1.598	1.617	1.651	1.685	1.712	1.723	1.734	1.747
Net trade (meat)	651	611	596	579	584	601	621	657	693	719	729	740	752
EU market price in EUR/t	1.748	1.711	1.721	1.751	1.759	1.769	1.766	1.765	1.767	1.756	1.746	1.741	1.728
World market price in EUR/t	1.353	1.336	1.343	1.368	1.374	1.382	1.381	1.381	1.383	1.374	1.366	1.362	1.352

*retail weight equivalent; coefficients to transform carcass weight into retail weight are 0,88 for poultry meat
Source: EU Agricultural Outlook, for the agricultural markets and income 2017–2030, The European Commission, DG AGRI, December 2017 (https://ec.europa.eu/agriculture/sites/agriculture/files/markets-and-prices/medium-term-outlook/2017/2017-fullrep_en.pdf)

“Animal health and welfare is critically important to AVEC and the European poultry industry. We work hard to protect the health and welfare of our animals.”

Projections

15. Aggregate meat market projections for the EU, 2005–2030 (‘000 tonnes carcass weight equivalent)

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Gross indigenous production	47.604	47.475	47.485	47.481	47.420	47.442	47.481	47.433	47.420	47.448	47.450	47.469	47.470
of which EU-15	38.951	38.749	38.728	38.755	38.690	38.640	38.614	38.558	38.494	38.477	38.429	38.410	38.384
of which EU-N13	8.652	8.726	8.757	8.725	8.730	8.802	8.867	8.875	8.927	8.971	9.021	9.059	9.086
Imports of live animals	0	0	0	0	0	0	0	0	0	0	0	0	0
Exports of live animals	308	310	302	297	291	285	279	274	268	262	256	251	245
Net production	47.297	47.165	47.183	47.185	47.129	47.158	47.202	47.159	47.153	47.186	47.194	47.219	47.226
Consumption	44.252	44.320	44.344	44.310	44.357	44.364	44.370	44.270	44.184	44.178	44.197	44.155	44.113
of which EU-15	35.967	35.992	36.030	35.993	36.040	36.052	36.062	35.975	35.920	35.938	35.985	35.974	35.952
of which EU-N13	8.284	8.328	8.314	8.318	8.317	8.312	8.308	8.294	8.264	8.240	8.212	8.181	8.160
per capita consumption (kg r.w.e.)*	68,9	68,9	68,9	68,8	68,8	68,8	68,8	68,7	68,5	68,5	68,5	68,5	68,4
of which EU-15	70,0	69,8	69,8	69,6	69,6	69,5	69,5	69,2	69,1	69,0	69,0	69,0	68,9
of which EU-N13	64,6	65,1	65,2	65,5	65,7	65,9	66,1	66,3	66,3	66,4	66,4	66,5	66,6
of which Beef and Veal meat	10,8	10,6	10,5	10,4	10,3	10,3	10,3	10,2	10,2	10,2	10,2	10,1	10,1
of which Sheep and Goat meat	1,9	1,9	1,9	1,9	1,9	1,9	1,9	1,9	2,0	2,0	2,0	2,0	2,0
of which Pig meat	32,0	32,0	31,9	31,9	31,8	31,8	31,8	31,8	31,6	31,6	31,6	31,6	31,5
of which Poultry meat	24,3	24,4	24,5	24,6	24,7	24,8	24,8	24,8	24,8	24,7	24,8	24,8	24,8
Imports (meat)	1.403	1.466	1.518	1.540	1.561	1.574	1.587	1.582	1.586	1.596	1.607	1.603	1.608
Exports (meat)	4.447	4.328	4.359	4.405	4.326	4.368	4.417	4.470	4.557	4.602	4.608	4.671	4.723
Net trade (meat)	3.043	2.862	2.841	2.865	2.765	2.793	2.830	2.889	2.972	3.005	3.001	3.068	3.116

*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: EU Agricultural Outlook, for the agricultural markets and income 2017–2030, The European Commission, DG AGRI, December 2017 (https://ec.europa.eu/agriculture/sites/agriculture/files/markets-and-prices/medium-term-outlook/2017/2017-fullrep_en.pdf)

EU28 poultry meat import trade, main tariff lines, 2005, 2010, 2016, 2017

IMPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2005	2010	2016	2017	2016	2017
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	4.349.336	1.774.498	1.563.947	1.605.467	189,49	199,51
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens'	111.011	114.059	155.044	99.668	129,74	132,02
02071370	Fresh or chilled cuts of fowls of the species 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)	0	79	36.571	271.271	132,43	143,90
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.419.962	1.018.232	861.421	789.407	209,84	233,07
02071460	Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in	408.140	120.717	54.410	51.744	120,97	113,22
02071470	Frozen cuts of fowls of the species 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)	43.130	30.488	8.602	6.078	144,84	125,66
02072710	Frozen boneless cuts of turkeys of the species domesticus	173.417	144.333	138.597	112.667	339,72	338,94
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	32.804	1.956.437	2.766.799	2.117.411	211,15	215,61
1602 (poultry)	**PREPARED/PRESERVED MEAT**	3.067.385	4.287.206	4.012.631	3.894.506	317,23	317,53
160231	**TURKEYS**	945.029	844.275	406.978	398.536	328,80	325,19
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	927.933	796.703	396.504	381.978	319,69	317,20
160232	**GALLUS DOMESTICUS**	2.052.387	3.305.460	3.453.650	3.326.801	306,78	309,19
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	161.148	99.833	196,15	203,34
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	2.599.276	2.652.403	344,09	336,99
16023230	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultry meat or offal (excl. of turkeys and guinea fowl etc.)	44.799	804.549	677.058	548.639	188,79	193,63
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	16.167	25.925	352,07	317,51
160239	**OTHER**	69.969	137.471	152.003	169.169	523,58	463,48
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	148.581	164.410	524,01	465,58

Source: Extraction Eurostat, July 2018

EU28 poultry meat export trade, main tariff lines, 2005, 2010, 2016, 2017

EXPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2005	2010	2016	2017	2016	2017
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	8.558.970	11.244.041	14.802.989	14.733.251	92,08	95,80
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	238.238	236.448	149.760	152.050	84,05	96,87
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	2.525.450	2.428.519	113,42	115,41
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.070.511	1.872.414	2.656.148	2.931.865	45,43	48,28
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	386.980	1.077.792	1.955.822	1.656.895	85,59	92,17
02071430	Frozen whole wings, with or without tips of Gallus domesticus	646.017	946.854	1.901.538	1.750.916	122,04	124,04
02071460	Frozen legs and cuts thereof of fowls of the species gallus	280.842	490.015	1.093.854	1.232.530	87,76	93,45
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	736.103	779.206	81,38	88,30
02072710	Frozen boneless cuts of turkeys of the species domesticus	577.512	306.916	284.397	256.894	88,21	96,04
02072730	Frozen whole wings, with or without tips, of turkeys	178.987	217.395	406.091	400.951	85,80	123,45
0207 other		2.100.561	2.701.830	3.093.826	3.143.425	106,04	110,32
1602 (poultry)	**PREPARED/PRESERVED MEAT**	290.382	451.698	393.582	409.516	351,23	356,16
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	187.573	202.150	334,40	337,60
16023230	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultry meat or offal (excl. of turkeys and guinea fowl etc.)	55.027	103.424	57.021	61.048	344,95	346,70
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	148.988	146.318	374,82	385,74

Source: Extraction Eurostat, July 2018

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