



Annual report

2019





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

AVEC secretariat

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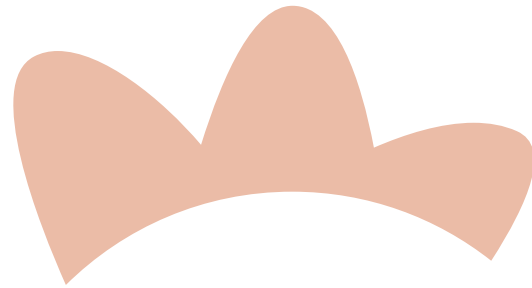
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European poultry producers are raising healthy, thriving birds



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 would like to thank the chairs of its working groups and HKScan for their contribution to this annual report

Introduction

The EU Commission very often qualifies the EU poultry meat sector as a success story because it is market-focused, flexible... and does not receive subsidies. While total meat consumption is stagnant or decreasing, the amount of poultry meat eaten continues to rise.

EU poultry meat producers have worked hard to build and maintain confidence in their products, and continually strive to implement the highest standards in the world in terms of food safety, animal health, environmental responsibility and animal welfare. This hard work has paid off.

EU producers are also working hard to export poultry meat to the rest of the world. The results are satisfactory, but more needs to be done globally to explain EU production methods, which are based on the 'farm to fork' principle. This is costly, but leads to products of a higher standard. Many AVEC members are in the process of applying for market access to China, which unfortunately is a long and difficult journey. Nevertheless, we hope that Chinese consumers will soon be able to purchase first-class EU poultry meat products, since there is going to be huge deficit of supply in China.

Despite this positive outlook, the future of the EU poultry meat sector is being heavily challenged by new quota concessions to third countries, and problems with reciprocal market access for EU poultry exports.

Firstly, a whopping quota of 180,000 tonnes of additional poultry was granted to the Mercosur countries in a historic deal which was closed on 29 June 2019. **The EU poultry sector has clearly been sacrificed in these negotiations**, as this was double the amount offered at the end of 2017 and agreed by EU Member States.

Secondly, Ukrainian companies have used a loophole to circumvent the quotas granted in the free trade agreement

with the EU, which has resulted in much higher quantities of breast meat being imported to the EU than what was foreseen in the agreement. In return for the closing of this loophole, Ukrainian companies will be rewarded with significant extra quantities.

Thirdly, to justify these concessions, the Commission has used the argument that they will be offset by increased consumption in the EU. **We do not find this acceptable as we already import 900,000 tonnes of poultry meat!** By comparison, around 300,000 tonnes of beef is imported, and the figure for pork is around 20,000 tonnes.

In addition, this argument does not hold water just ahead of Brexit. The UK is one of the largest importers and consumers of poultry meat in Europe, and Brexit could have significant consequences for the EU poultry meat market. At the time of writing, the situation is currently extremely uncertain and the nature of the future relationship is still far from certain.

There has been a huge amount of interest in animal health and welfare – including poultry health and welfare – in the **European Parliament** over the past year. In October 2018 this resulted in a resolution on animal welfare, antimicrobial use and the environmental impact of industrial broiler farming. AVEC welcomes the interest of the European Parliament in our sector, and in the coming years we will do our utmost to inform opinion leaders about the EU poultry meat sector.

Over the past year the **EU Commission** has published a number of delegating and implementing acts in the framework of the Official Control regulation and Animal Health law. This legislation aims to guarantee first-class food safety for poultry production. The European poultry meat sector is proud to be bound by these strict EU rules, but they also confront the sector with extra costs.

To help create a **level playing field** we need to ensure that the Commission applies equally thorough controls on poultry meat that enters the EU from third countries. Additionally, to enable consumers to make an informed choice, we need mandatory labelling of the origin (EU/non-EU) on all poultry meat and meat products in all settings, including retail and out-of-home consumption.

Despite the challenges we face regarding international trade, the EU poultry


meat sector is still committed to fulfilling its 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**

... so that EU consumers can enjoy safe and healthy EU poultry:




Paul Lopez
 President


Birthe Steenberg
 Secretary general

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“

AVEC is committed to improving knowledge, innovation and transparency in the European poultry meat sector. We champion the shared values of the sector so that every consumer, food professional, official and politician can have confidence in our products.

”



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 and sustainable European 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 17 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). He chairs board meetings and the general assembly, and participates in working groups.

AVEC has four vice-presidents who assist the president. Zbigniew Idziaszek 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 players. Our members include national organisations that represent the poultry industry and poultry trade in 17 EU Member States.

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Board members, 2019–2020

| Country | Board Member | Deputy Board Member |
|----------------|----------------------|---------------------|
| AUSTRIA | Harald Schliessnig | Stefan Weber |
| BELGIUM | Philip Eeckman | Ann Truyen |
| DENMARK | Stig Munck Larsen | Kristian Kristensen |
| 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 |
| LATVIA | Anna Erliha | Solvita Gulbe |
| NETHERLANDS | Gert Jan Oplaat | Peter Vesseur |
| POLAND | Zbigniew Idziaszek | Lukasz Dominiak |
| PORTUGAL | Avelino Gaspar | Dinis dos Santos |
| ROMANIA | Ilie Van | Theodora Popa |
| SLOVENIA | Nada Krajnc | Janez Rebec |
| SPAIN | Claudio Arenas | Angel Martin |
| SWEDEN | Maria Donis | Magnus Lagergren |
| UNITED KINGDOM | Philip Wilkinson | Richard Griffiths |

“Poultry meat production is a European success story.”

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 **ERPA** (the European Rural Poultry Association), **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), **EFPPA** (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.



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 into producers/processors (22), suppliers (20) and end users (7).

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 the 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 Robin Horel, CPEPC, Canada
- Vice-president: Mr Ricardo Santin, ABPA, Brazil
- Treasurer: Mr James H. Sumner, USAPEEC
- Members: Ms Yu Lu, CCNA, China; Richard Griffiths, British Poultry Council (BPC); Mrs Birthe Steenberg, AVEC, EU
- Associate members: Laura Villareal, Merck Animal Health (Suppliers group); Randal Giroux Cargill (End users/consumers group); Stig Munck Larsen, Danish Agriculture & Food Council (Producers/processors group)
- Secretary general: Marilia Rangel

Recent IPC conferences:

- | | |
|---------------------------|------------------------------|
| Rome, Italy, 2011 | Abu Dhabi, UAE, 2016 |
| Livingstone, Zambia, 2011 | Lisbon, Portugal, 2016 |
| Paris, France, 2012 | Cartagena, Colombia, 2017 |
| Salvador, Brazil, 2012 | Banff, Canada, 2017 |
| Bangkok, Thailand, 2013 | Noordwijk, Netherlands, 2018 |
| Geneva, Switzerland, 2013 | Nanjing, China, 2018 |
| Istanbul, Turkey, 2014 | New Orleans, USA, 2019 |
| Rome, Italy, 2015 | Sao Paulo, Brazil, 2019 |
| Xi'an, China, 2015 | |

A high-angle photograph of a whole roasted chicken on a rustic wooden cutting board. The chicken is golden-brown and seasoned with salt and pepper. In the top right corner, there are several pieces of crusty bread topped with black olives. In the bottom left corner, a small wooden bowl contains green olives. The background is a dark, textured wooden surface.

AVEC's focuses 2018–2019

This section provides an overview of the main themes AVEC has worked on during 2018-2019. 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 improving the health and welfare of European poultry raised for slaughter.

There has been a particular focus on poultry health and welfare in the European Parliament over the past year, and in October 2018 this resulted in a resolution on animal welfare, antimicrobial use and the environmental impact of industrial broiler farming. In this resolution the European Parliament recognised the efforts already being made by farmers to maintain high standards of broiler welfare. It also noted that unfair competition has led to an uneven playing field, and called on the European Commission to reinforce border controls on imported poultry meat to ensure that imports comply with EU legislation on animal welfare, food safety and the environment. Additionally, it called on the Commission to propose legislation introducing mandatory labelling of imported processed meat products in the retail, catering and food services sectors so that consumers can make an informed choice regarding their origin.

AVEC welcomes the European Parliament's interest in our sector, and in the years to come we will do our utmost to inform opinion leaders about the EU poultry meat sector.

Avian influenza

The avian influenza situation has improved in the past 12 months in western/central Europe. At an international level, the revision of the OIE Terrestrial Code on avian influenza is ongoing, and adoption of the revised rules to control the disease is expected in May 2020. In terms of sanitary and phytosanitary barriers to trade, good cooperation with European Commission services and the OIE is a key pillar in the implementation of safe exports of poultry meat to third countries.

Animal health law

The European Commission has been working intensively on the definition of implementation and delegation acts relating to animal health law. AVEC welcomes the opportunity to actively cooperate in this process with the European Commission and Member States to ensure effective and viable practices and a level playing field.



EU Platform on Animal Welfare

The poultry sector is active in the EU Platform on Animal Welfare and its subgroups, which aim to define best practices and guidelines to better implement Regulation (EU) 1/2005 (<https://bit.ly/2jsEiWr>). The subgroup on Transport during extreme temperatures has involved coordination among officials from Member States, NGOs and sectorial representatives. The work carried out so far has made positive progress towards

compliance with the European Parliament and Council's call for improved animal welfare conditions during transport.

Welfare

Benchmark studies on:

- Regulatory Framework and Key Practices in the Poultry Meat Supply Chain in the EU and USA¹
- Competitiveness of the EU poultry meat sector²

have evaluated the impact of EU legislation on European poultry production, comparing this with the considerable lack of mandatory requirements in third countries.

The European poultry sector has responded proactively to the European Union's goal of become leaders in animal welfare. To reflect this, AVEC stresses the importance of clearly including EU animal welfare standards in any free trade negotiation in order to secure fair trade.

Meanwhile AVEC working group experts are ready to cooperate with EFSA and national contacts on the development of robust and measurable welfare indicators, as recently highlighted by the European Parliament.³

Veterinary medicinal products

The 2019 Eurobarometer report on food safety in the EU highlighted that one of the greatest perceived risks when it comes to food is the fear of antibiotic residues in meat.

AVEC welcomes the new Regulation (EU) 2019/6 on veterinary medicinal products and Regulation (EU) 2019/4 on medicated feed, and the goal of the Commission to enforce basic rules on antimicrobial resistance in a non-discriminatory manner when

it comes to animals and products of animal origin exported to the Union.

European poultry producers are aiming for a sustainable reduction of antibiotic use, investing in preventative disease strategies starting from the hatchery and looking at the effectiveness of alternative treatments. Notwithstanding all these measures, it remains the case that animals still need to be treated with antimicrobial substances if they become sick.

The poultry meat sector is contributing to the discussion at European level by participating in the new EIP-AGRI focus group on reducing antimicrobial use in poultry farming.



1 Comparison of the Regulatory Framework and Key Practices in the Poultry Meat Supply Chain in the EU and USA .Undertaken by ADAS UK Ltd in conjunction with The University of Arkansas August 2016 <http://www.avec-poultry.eu/wpcontent/uploads/2018/06/Etude-ADAS-Final-Low-res..pdf>

2 <https://www.avec-poultry.eu/resources/avec-reports/>

3 http://www.europarl.europa.eu/doceo/document/RC-8-2018-0484_EN.html. Resolution from the EU Parliament on animal welfare, antimicrobial use and the environmental impact of industrial broiler farming.



AVEC Working group on food safety and food quality



Chair, Richard Griffiths

Food safety is the first priority of any food producer: it is pre-competitive, and it is integral to all of the UN's Sustainable Development Goals (SDGs) that relate to food. We are immensely proud of our standards and recognise the work that goes into creating effective legislation, whether from regulators, industry, or any other stakeholder. Poultry

meat production is a European success story: it achieves high and trusted standards while feeding over 95% of the population with a huge variety of products.

At AVEC we take nothing for granted and are passionate about protecting and improving standards, while helping our members to continue providing Europe with safe and nutritious food. The Working group on food safety and food quality engages with the European Commission and other stakeholders to help shape regulation, develop our standards, and promote our world-leading farm-to-fork processes.

Official controls

In 2019 the European Commission published revised regulation on Official controls on products of animal origin intended for human consumption⁴. Safe food is a core value of AVEC's members, and is part of why consumers have trust and confidence in our poultry meat products. We welcomed the revisions and look forward to engaging further with the Commission as the science and technology of meat inspection develops over the next few years.

Maintaining our high standards

EU audits of members states in the areas of food safety and quality, as well as animal health and welfare, have shown that European producers are working hard to maintain our high standards and are as prepared as we can be to face incidents such as outbreaks of avian influenza. Conversely, some third-country audits showed trading partners that are not meeting our high standards.

- audit reports performed by the EU Commission in 2013⁵ and 2017⁶ showed that Brazil does not respect EU rules
- audit report prepared by the EU Commission on control of residues and contaminants in Thailand⁷ as regards veterinary medicinal products authorised for poultry identified 21 relevant pharmacologically active substances, of which 13 were included in the 2018 residue monitoring plan for poultry, and the other eight not. Audits identified a validation gap for poultry analytical methods combined with a lack of available control charts for monitoring performance of analytical methods, which were undermining the reliability of the analytical results obtained

AVEC will continue to advocate for fair and sustainable trade agreements that mean imported products have to meet both our legislation and our consumers' expectations. We are urging the Commission to re-examine its definition of 'equivalence' in trade deals and to reinforce border controls on imported poultry meat products.

4 Regulation (EU) 2017/625, Commission Delegated Regulation (EU) 2019/624, Commission Delegated Regulation (EU) 2019/625, Commission Implementing Regulation (EU) 2019/626, Commission Implementing Regulation (EU) 2019/627 and Commission Implementing Regulation (EU) 2019/628

5 http://ec.europa.eu/food/audits-analysis/audit_reports/details.cfm?rep_id=3231

6 http://ec.europa.eu/food/audits-analysis/audit_reports/details.cfm?rep_id=3874

7 http://ec.europa.eu/food/audits-analysis/act_getPDF.cfm?PDF_ID=14319

Microbiological controls

Salmonella. AVEC is working closely with EFSA on *Salmonella* control programmes and we are together looking at targets for *Salmonella* in laying breeding hens and broiler chickens in different types of rearing systems.

Campylobacter. By 2020 the poultry sector aims to be carrying out outcomes-based monitoring of the process hygiene criterion set in Regulation (EC) No 2073/2005⁸ on microbiological criteria for foodstuffs (initial target of 40% of samples being allowed to register over 1,000 cfu/g) and identifying effective control measures.

Welfare at slaughter

Welfare at slaughter continues to be an important subject, and this year EFSA has worked on a revised opinion to develop animal-based indicators with a view to mitigating welfare consequences. AVEC will be working with EFSA to see how best these indicators can be applied in the slaughterhouse.

Marketing standards

The Commission has instigated a study to evaluate current marketing standards, which may allow modification of the legislation at the beginning of 2020. This gives us the opportunity to reinforce our production values to the consumer, and to update the standards with relevant improvements in science and technology. AVEC believes that imports must meet our standards in all respects, whether technical or marketing, and we are looking forward to aiding the Commission in this process.

Meat denomination

AVEC members are committed to providing informative labelling that allows consumers to make a confident and responsible choice. Descriptions that were once only applied to meat products now have a role in plant-based foods. AVEC is calling for clarity on what are solely meat-related denominations⁹ as

opposed to those with wider applications, thus giving clear consumer information.

Country of origin labelling

European consumers and AVEC members are aligned on the need for transparent mandatory labelling of origin ('EU' or 'non-EU') for all poultry products across all distribution channels (restaurants, canteens, catering, etc). We are also determined that imports from third countries should be fully compliant with these requirements at all stages of the production chain. Although we recognise the complexity of this, AVEC is calling for labelling that shows the name of the country of origin of products containing poultry meat.



⁸ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:02005R2073-20190228>

⁹ Meat denomination defined in Commission Regulation (EC) No 543/2008 and Commission Regulation (EC) No 853/2004



Turkey sector



Chair, Yann Brice

Standing at 5.98 million tonnes (carcass weight equivalent), global turkey meat production remained fairly stable in 2018 compared with 2017 (up +0.54%), but while US production declined (-1.53%), production in Europe increased (+0.53%).

Turkey production in Europe is still concentrated in six Member States (Poland, Germany, France, Italy, Spain and the United Kingdom). With roughly 1.8 million tonnes produced, these countries represent 86% of total EU turkey meat production.

The total production of these six Member States did not change between 2017 and 2018, but while Germany, France and Italy reduced production, Poland, Spain and the United Kingdom increased theirs.

With an average consumption of 4kg per capita per year in Europe over the last two years, consumption of turkey meat remains stable, but still struggles against growing consumption of chicken. Enhancing the image of turkey meat is essential if we want to keep it on our plates. Some Member States have been successful, and we hope that our application for EU promotion funds will be approved and will create renewed interest in this meat.



Updating the Guidelines for good practice in turkey production

The previous Guidelines for good practice in turkey production, developed by AVEC's members, established a common European baseline, but the guidelines had not been updated since

2012. Members of the turkey sector group wished to revise the guidelines to better reflect current uses and practices, along with citizens' expectations and consumer demands.

Knowing that each Member State has its own national guide, often including different requirements, a review of these guides was initiated to determine a proposed future common position for the next European-wide good practice guidelines.

Experts from each country were mandated to establish new terms of reference, along with the minimum requirements expected. Proposals were discussed at the working group meeting held before the 2019 general assembly in Budapest.

Histomonosis: promising research?

Many drugs and herbal substances have been evaluated for the treatment of histomonosis, but to date none have had any significant effect. Following several serious cases of histomonosis in the USA and Turkey, the idea of vaccinating turkeys – particularly reproductive ones – was raised again by the United States.

In Europe, the Department for Farm Animals and Veterinary Public Health (University of Veterinary Medicine, Vienna, Austria) developed a clonal culture of *Histomonas* to address various questions of in vitro growth. This in vitro protocol showed positive effects but did not demonstrate a reduction in lesions or clinical signs in either chickens or turkeys, and very little is known about the immune response following vaccination. In addition, there were no data or safety studies to show that vaccinated birds had residual lesions confined to the caeca, compared with unvaccinated birds where lesions and parasites were also present in the liver and lungs. Nevertheless, the positive aspect of this experiment is that it demonstrated

that the vaccine strain does not become virulent after passage in vivo in chickens or turkeys.

Funding for European research into turkey production is still limited, and we are sorely lacking alternative ideas for developing an effective vaccination programme. Will a breakthrough come from our colleagues in the USA?



AVEC Working group on sustainable production



Chair, Christophe Lapasin

In 2018, AVEC created a working group dedicated to the sustainable production of poultry meat. Its first task was to drive the current review of the BREF SA (Best available techniques reference document for the slaughterhouses and animal by-products industries), the main document of Directive (CE)75/2010. This Directive sets the European statutory environmental framework for slaughterhouses with a production capacity of over 50 tonnes per day, and animal by-products plants producing over 10 tonnes per day.

After multiple delays, reviewing began in September 2018 when the European Commission (represented by the EIPPC Bureau of Seville) created the dedicated Technical Working Group (TWG), to which review proposals were submitted in December 2018. AVEC's taskforce, mainly composed of representatives from Belgium, Denmark, France, Germany and the Netherlands, gathered several times in 2018 to assess the current BREF SA, and to comment on the proposals.

Another BREF is now on the working group's agenda: BREF FDM (Food, drink and milk industries), representing agribusinesses producing more than 75 tonnes per day of finished products. The working group's conclusions will be published

Future meetings about the turkey sector

During the last meeting, all members confirmed that they wished for discussions to continue. Recognising the specific economic status of turkey production, combined with its particular animal health and welfare issues, it was decided to hold two meetings during the year: a full day in the spring, plus a half day in the autumn before the AVEC general assembly.

soon. Meanwhile, the following points are particularly noteworthy for poultry meat processing plants:

- the definition of a clear distinction between slaughterhouses (BREF SA) and cutting plants (BREF FDM)
- proposals for monitoring smoke from smoke kilns
- the low permitted limit of phosphorus released into waste water
- the limiting of refrigerants to ammonia and CO₂

Beyond that, the future role of the working group will be to show that, as well as producing tasty, healthy and affordable poultry meat for consumers, the industry is responding to major environmental issues and the concerns of citizens. The low carbon footprint of poultry meat compared with other meats, and even some vegetable foodstuffs (rice for instance), is one of its strengths. Environmental performance is lower for organic systems than for more intensive ones, although that must be seen in the context of greater biodiversity.

The capacity of poultry to recycle feedstuffs that are not suitable for human consumption is another issue to develop in order to master the impact on deforestation. Finally, as sources of fossil phosphorus are limited, and the synthesis of nitrogen has an impact on climate change, the high agronomic value of poultry manure must be emphasised.



AVEC Working group on trade

The Working group on trade acts as an expert group to:

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



Chair, Stig
Munck Larsen

Poultry meat is now king of global animal protein consumption

The outlook for poultry meat over the coming 3-5 years looks positive for several reasons. Consumer behaviour continues to be in favour of poultry, leading to higher poultry consumption in both the EU and globally, led not least by a growing middle class in countries in Asia, the Middle East and Africa. Consumption of poultry meat is not only increasing due to growth in the global population, but also because of an increase in average consumption per person – the result of an increased appetite for nutritious meat at a lower price. An additional, important factor in the consumption equation has been the outbreak of African swine fever (ASF), which is expected to reduce the Chinese pig population by 30% and the global pig population by at least 15%. This is also likely to have a significant impact on global meat prices and the trade in animal protein, leading to increased demand for alternatives to pork in China. As an affordable source of protein, poultry meat is well positioned to replace part of the pork market, benefiting from a lower price relative to pork. While this may lead to greater investment in poultry production in China, all indicators point towards an increased demand for imports of poultry meat in the coming years. This will potentially create a window of opportunity for

EU producers, who are ready to start exporting quality EU poultry meat to Chinese consumers when market access is granted.

As a result of this severe outbreak of ASF in China, it is evident that poultry meat will become the king of global animal protein consumption in 2019 – a position that will only be strengthened in the future.

Main trade issues in 2018-19

Over the last year the Working group on trade has been extraordinarily busy with several major and important topics:

1. Mercosur. At the end of June 2019, the EU Commission announced a political agreement with the Mercosur countries, 20 years after negotiations started. The result is catastrophic for the EU poultry meat sector: a whopping duty-free quota of 180,000 tonnes of additional poultry (half bone-in/half boneless) was granted to Mercosur countries (mainly Brazil), representing precisely double the amount of the last offer made at the end of 2017 and agreed by EU Member States. It is clear that the poultry sector has been sacrificed in these negotiations, and nothing can justify a 100% increase of the quota.

With these additional quotas, the EU will import the equivalent of Germany or France's chicken meat production. In addition, these concessions will not be split between the EU and UK after Brexit, which will further weaken the EU poultry sector.

The agreement is even more difficult to accept in the wake of multiple EU audits showing critical deficiencies regarding compliance with EU standards, along with fraud scandals affecting Brazilian production which have led to the delisting of 20 Brazilian plants. By concluding this agreement, the EU Commission has dramatically undermined the position of EU poultry meat producers at a very uncertain time, namely the

run-up to Brexit. In addition, it will further increase the dependency on third countries for the production of breast meat, as after the agreement more than 25% of the breast meat consumed in the EU will come from third countries.

2. South Africa. The Economic Partnership Agreement – EPA – between the EU and South Africa allows for mutual free market access for poultry meat. Despite this, a trade dispute with South Africa has arisen as a result of several factors. Imposition of high safeguard duty on imports from the EU, in addition to significant anti-dumping duties on imports from the UK, Germany and the Netherlands, plus an import ban on several EU countries due to previous outbreak of AI as a defence mechanism to protect local production, have significantly reduced EU exports to South Africa.

AVEC is of the firm belief that these obstacles to trade are not in compliance with the agreement and should be addressed accordingly. Unfortunately, South Africa has so far not been willing to find a political solution that would satisfy both sides, despite AVEC's and the EU Commission's efforts to facilitate dialogue with the South African Poultry Association and the competent authority. Nevertheless, AVEC is still aiming to find a common position that respects the mutual interests of producers and consumers. A negotiated agreement is preferred instead of referring the issue to the dispute settlement body established under the EPA.

3. Ukraine. AVEC is seriously concerned about the loophole Ukrainian exporters have utilised in the free trade agreement. The EU poultry sector was treated as a sensitive sector in the free trade negotiations and for that reason a tariff-rate quota (TRQ) of 20,000 tonnes of breast meat was granted to Ukraine. The invention of a new poultry cut, which has never been traded or demanded in significant commercial trade, clearly indicates that exporters have acted against the political spirit of the trade agreement. An export under this tariff line with zero duty rising from zero to 60,000 tonnes yearly without any upper limits is poison for the EU poultry sector in an environment of

non-compliance with the EU regulation on, for instance, animal welfare, which was foreseen and agreed in the trade agreement.

AVEC is confident that the EU Commission will ensure that normal trade resumes in line with the spirit of the trade agreement and in full compliance with the legislative requirements that EU poultry producers must meet. A level playing field in poultry production is an absolute necessity if agreement is to be reached to raise the TRQ of breast meat by an additional 50,000 tonnes to compensate for the closure of the loophole.

The direction of Brexit

During technical discussions on Brexit, AVEC has been strongly engaged in the split of EU poultry meat TRQs granted to third countries as part of WTO concessions. For AVEC, balancing the TRQ split between the EU27 and the UK based on historical import levels from third countries has become the key issue. The aim of this is to restore ordinary trade/imports into EU27 and UK as best as possible when the UK leaves the EU.

With the extension of the deadline for the UK to take a final decision on what conditions to leave the EU on, AVEC is still of the firm opinion that the best option for both parties is for the UK to stay in the customs union, without any border controls. This would ensure the continuation of frictionless trade between the two trading partners.



If the UK decides on a hard Brexit, import duties will be imposed on both sides, as well as physical customs clearance measures. These will be to the detriment of both EU and UK poultry producers. Bearing in mind the volume of poultry meat traded across the English Channel, any significant trade barriers will risk negatively impacting the trade longer-term.

Implementation of EU free trade agreements

AVEC generally supports free trade agreements (FTAs) that do not undermine the position of EU poultry producers. AVEC believes that FTAs should be based on fair competition in order to maintain a level playing field for EU poultry producers. Fair competition can only be achieved by complying with the same strict rules and standards that are laid down in EU legislation to safeguard food safety and animal welfare, and to protect the environment and consumers. In this context it is a pre-condition that EU legislators respect the precautionary principle in the EU Treaty securing safe food for EU citizens when negotiating free trade agreements.

The EU poultry sector will not accept being traded off against other sectors to reach free trade agreements without reciprocity and market access to the third party, as well as respect for a balanced concession.

It is vital to get FTAs right from the beginning in terms of both concessions and trade. It is equally important to ensure that any FTAs in force are being implemented correctly, according to the legal text and the spirit of the agreements.

We are seeing more cases of violations to these agreements, while at the same time the European Commission, the European Parliament and Member States are taking these breaches more seriously, and are more ready to defend European interests. AVEC encourages politicians in the EU to clamp down on any breaches of free trade agreements and if necessary, to take appropriate measures to restore a level playing field should the rules not be followed.



Therefore AVEC welcomes the initiative from Commission President Elect Ursula von der Leyen to appoint a chief trade enforcement officer to improve compliance and enforcement of the EU's trade agreements. AVEC is supportive of the new EU Commission taskforce that has been established to monitor the implementation of free trade agreements and to react to any non-compliance.

A new Commission and European Parliament in 2019

During the second half of 2019 a new European Parliament and new Commissioners (and high-level staff) will be appointed for a five-year period.

The Working group on trade will engage with relevant MEPs to give AVEC a stronger voice in the Parliament as a basis for their decision-making towards the European Council and the Commission. With the increasing importance of the Parliament, it is essential to make MEPs aware of the sensitivity of the European poultry sector to matters such as trade issues in order to safeguard jobs and growth, especially in rural areas in the EU.

The Working group on trade has a strong desire to encourage all AVEC members to contribute actively to its work so that it can establish the best evidence for decisions taken by the AVEC board.

“

Sustainable production

Poultry meat has the best feed conversion ratio of the different meat species and therefore contributes to lower emission levels. Despite these advantages, the poultry sector is working to increase production efficiency to address the challenge of climate change

”

Statistics

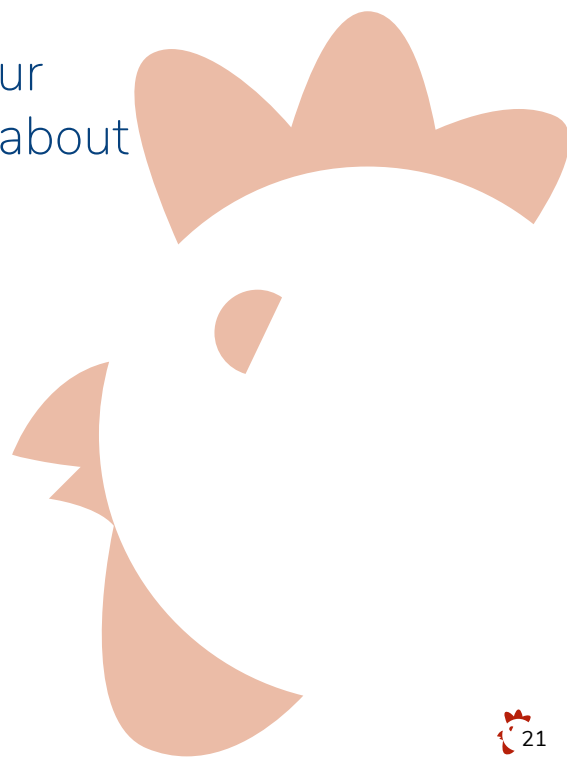
1. EU balance sheet for poultry meat ('000 tons carcass weight)

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|-----------------------------|--------|--------|--------|--------|--------|--------|
| Gross indigenous production | 12.815 | 13.273 | 13.797 | 14.503 | 14.576 | 14.896 |
| Export of meat | 1.311 | 1.365 | 1.388 | 1.548 | 1.542 | 1.580 |
| Import of meat | 791 | 821 | 855 | 882 | 789 | 766 |
| Consumption | 12.285 | 12.719 | 13.254 | 13.829 | 13.817 | 14.074 |
| Consumption per capita, kg | 21,4 | 22,0 | 22,9 | 23,8 | 23,7 | 24,1 |
| Self-sufficiency, % | 104,3 | 104,4 | 104,1 | 104,9 | 105,5 | 105,8 |

Note: Partial provisional or estimated.

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

“ In the years to come we will do our utmost to inform opinion leaders about the EU poultry meat sector. ”



Production (updated 2018)

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Austria | 121 | 122 | 122 | 129 | 133 | 134 |
| Belgium / Luxembourg | 389 | 433 | 453 | 461 | 463 | 470 |
| Bulgaria | 98 | 102 | 106 | 109 | 107 | 108 |
| Croatia | 68 | 68 | 83 | 81 | 80 | 82 |
| Cyprus | 22 | 22 | 24 | 20 | 25 | 25 |
| Czech Republic | 171 | 175 | 175 | 177 | 183 | 194 |
| Denmark | 168 | 173 | 147 | 156 | 156 | 157 |
| Estonia | 18 | 19 | 20 | 20 | 20 | 21 |
| Finland | 111 | 113 | 116 | 121 | 130 | 139 |
| France | 1.842 | 1.827 | 1.828 | 1.830 | 1.857 | 1.863 |
| Germany | 1.714 | 1.775 | 1.807 | 1.817 | 1.802 | 1.818 |
| Greece | 180 | 190 | 175 | 158 | 153 | 155 |
| Hungary | 515 | 543 | 577 | 620 | 602 | 644 |
| Ireland | 129 | 129 | 125 | 132 | 152 | 160 |
| Italy | 1.259 | 1.261 | 1.321 | 1.388 | 1.354 | 1.325 |
| Latvia | 26 | 29 | 30 | 30 | 33 | 35 |
| Lithuania | 93 | 100 | 111 | 112 | 118 | 120 |
| Malta | 4 | 4 | 4 | 4 | 4 | 4 |
| Netherlands | 848 | 941 | 1.057 | 1.097 | 1.118 | 1.119 |
| Poland | 1.798 | 2.022 | 2.161 | 2.425 | 2.511 | 2.630 |
| Portugal | 324 | 327 | 336 | 343 | 337 | 341 |
| Romania | 360 | 397 | 411 | 419 | 392 | 392 |
| Slovakia | 64 | 59 | 58 | 66 | 71 | 72 |
| Slovenia | 57 | 60 | 59 | 67 | 68 | 66 |
| Spain | 1.299 | 1.390 | 1.453 | 1.526 | 1.454 | 1.538 |
| Sweden | 128 | 137 | 145 | 156 | 157 | 155 |
| United Kingdom | 1.606 | 1.587 | 1.663 | 1.739 | 1.812 | 1.884 |
| EU | 13.407 | 14.004 | 14.565 | 15.201 | 15.357 | 15.776 |

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

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

Production (updated 2018)

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|-------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Argentina | 2.002 | 2.027 | 2.093 | 2.055 | 2.174 | 2.302 |
| Brazil | 12.663 | 12.945 | 13.546 | 13.523 | 13.111 | 14.155 |
| Chile | 675 | 663 | 700 | 727 | 721 | 720 |
| China | 18.271 | 17.508 | 18.051 | 17.149 | 16.634 | 16.800 |
| India | 2.880 | 2.759 | 2.889 | 3.111 | 3.260 | 3.363 |
| Japan | 1.458 | 1.494 | 1.517 | 1.545 | 1.570 | 1.576 |
| Mexico | 2.808 | 2.880 | 2.972 | 3.078 | 3.196 | 3.244 |
| Russia | 3.831 | 4.161 | 4.536 | 4.717 | 5.050 | 5.088 |
| Saudi Arabia | 570 | 619 | 621 | 642 | 674 | 688 |
| Switzerland | 80 | 85 | 87 | 91 | 95 | 100 |
| South Africa | 1.683 | 1.742 | 1.810 | 1.835 | 1.849 | 1.849 |
| Turkey | 1.789 | 1.952 | 1.988 | 1.966 | 2.020 | 2.038 |
| Ukraine | 992 | 1.022 | 1.027 | 1.064 | 1.070 | 1.066 |
| USA | 20.030 | 20.340 | 20.955 | 21.422 | 21.854 | 22.250 |
| World Production | 109.267 | 111.655 | 115.555 | 118.551 | 120.143 | 123.205 |

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>

“ European poultry producers are aiming for a sustainable reduction of antibiotic use. ”

Trade

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | from third countries |
|--|------------|------------|------------|------------|------------|------------|----------------------|
| Poultry meat ¹⁾ | | | | | | | |
| Austria | 100 | 101 | 102 | 114 | 105 | 103 | 0 |
| Belgium / Luxembourg | 229 | 240 | 252 | 268 | 305 | 273 | 2 |
| Bulgaria | 88 | 98 | 103 | 102 | 111 | 110 | 0 |
| Croatia | 18 | 18 | 20 | 21 | 19 | 21 | . |
| Cyprus | 10 | 9 | 10 | 11 | 11 | 12 | 0 |
| Czech Republic | 96 | 99 | 114 | 119 | 109 | 117 | 0 |
| Denmark | 84 | 69 | 66 | 58 | 63 | 72 | 1 |
| Estonia | 19 | 18 | 18 | 21 | 19 | 27 | 0 |
| Finland | 5 | 7 | 9 | 9 | 10 | 9 | 0 |
| France | 381 | 396 | 420 | 437 | 442 | 456 | 1 |
| Germany | 571 | 597 | 614 | 672 | 694 | 694 | 29 |
| Greece | 76 | 79 | 72 | 79 | 80 | 82 | 0 |
| Hungary | 52 | 50 | 36 | 40 | 54 | 51 | 0 |
| Ireland | 72 | 82 | 104 | 90 | 82 | 84 | 1 |
| Italy | 63 | 66 | 66 | 59 | 68 | 70 | 3 |
| Latvia | 30 | 30 | 28 | 34 | 40 | 40 | 0 |
| Lithuania | 33 | 33 | 37 | 35 | 39 | 39 | 0 |
| Malta | 5 | 5 | 6 | 6 | 6 | 6 | . |
| Netherlands | 431 | 429 | 396 | 503 | 491 | 575 | 108 |
| Poland | 40 | 38 | 36 | 47 | 59 | 78 | 23 |
| Portugal | 53 | 59 | 64 | 67 | 67 | 73 | 0 |
| Romania | 96 | 119 | 124 | 137 | 143 | 136 | 5 |
| Slovakia | 57 | 52 | 48 | 18 | 18 | 20 | 10 |
| Slovenia | 15 | 15 | 17 | 53 | 57 | 82 | 0 |
| Spain | 127 | 116 | 155 | 163 | 182 | 169 | 22 |
| Sweden | 46 | 49 | 52 | 55 | 58 | 55 | 0 |
| United Kingdom | 396 | 387 | 409 | 435 | 429 | 444 | 27 |
| EU | 149 | 152 | 155 | 157 | 161 | 234 | 233 |
| Salted meat ²⁾ | | | | | | | |
| Germany | 38 | 47 | 47 | 50 | 39 | 27 | 21 |
| Netherlands | 160 | 173 | 170 | 176 | 141 | 121 | 115 |
| United Kingdom | 50 | 55 | 59 | 60 | 45 | 36 | 31 |
| EU from third countries | 227 | 256 | 265 | 277 | 211 | 175 | 175 |
| Preparations of poultry ³⁾ | | | | | | | |
| EU from third countries | 397 | 380 | 387 | 401 | 389 | 338 | 338 |

Notes: 1. Without preparations, livers, salted meat and live poultry. - 2018 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 tons¹)

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 ²⁾ | to third countries |
|--|--------------|--------------|--------------|--------------|--------------|--------------------|--------------------|
| Austria | 55 | 60 | 58 | 57 | 61 | 64 | 2 |
| Belgium / Luxembourg | 473 | 481 | 538 | 576 | 617 | 599 | 153 |
| Bulgaria | 36 | 41 | 39 | 41 | 44 | 46 | 4 |
| Croatia | 4 | 6 | 7 | 8 | 8 | 9 | 4 |
| Cyprus | 1 | 1 | 0 | 1 | 1 | 1 | 1 |
| Czech Republic | 30 | 31 | 35 | 37 | 24 | 23 | 1 |
| Denmark | 81 | 77 | 67 | 74 | 86 | 83 | 41 |
| Estonia | 7 | 6 | 6 | 7 | 7 | 7 | 1 |
| Finland | 18 | 16 | 17 | 16 | 13 | 14 | 3 |
| France | 519 | 477 | 477 | 433 | 425 | 402 | 194 |
| Germany | 510 | 543 | 507 | 494 | 482 | 443 | 59 |
| Greece | 22 | 26 | 21 | 21 | 29 | 33 | 13 |
| Hungary | 195 | 204 | 202 | 229 | 183 | 198 | 45 |
| Ireland | 52 | 59 | 69 | 74 | 90 | 82 | 29 |
| Italy | 147 | 149 | 154 | 177 | 165 | 157 | 53 |
| Latvia | 14 | 15 | 11 | 13 | 18 | 17 | 3 |
| Lithuania | 43 | 46 | 49 | 47 | 55 | 51 | 10 |
| Malta | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| Netherlands | 1.073 | 1.223 | 1.150 | 1.382 | 1.437 | 1.476 | 385 |
| Poland | 587 | 714 | 841 | 1.025 | 1.156 | 1.311 | 365 |
| Portugal | 19 | 20 | 25 | 27 | 42 | 34 | 12 |
| Romania | 70 | 59 | 66 | 57 | 59 | 66 | 11 |
| Slovakia | 36 | 37 | 33 | 30 | 21 | 36 | 1 |
| Slovenia | 19 | 20 | 17 | 20 | 22 | 23 | 8 |
| Spain | 137 | 178 | 198 | 230 | 216 | 245 | 82 |
| Sweden | 52 | 60 | 65 | 76 | 74 | 77 | 8 |
| United Kingdom | 350 | 352 | 299 | 296 | 335 | 361 | 94 |
| EU | 1.269 | 1.331 | 1.332 | 1.506 | 1.486 | 1.580 | 1.580 |
| which were | | | | | | | |
| Chicken | 1.096 | 1.161 | 1.172 | 1.323 | 1.320 | 1.421 | . |
| Turkey | 142 | 138 | 129 | 151 | 141 | 127 | . |
| Preparations of poultry ³⁾ | | | | | | | |
| EU to third countries | 42 | 40 | 38 | 39 | 41 | 44 | 44 |

Notes: 1. Without preparations, livers, salted meat. 2. 2018 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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|--------------------------------------|-------|-------|-------|-------|-------|-------|
| Total imports of poultry meat | | | | | | |
| Switzerland | 45 | 47 | 47 | 46 | 45 | 45 |
| Imports of broiler meat | | | | | | |
| Angola | 321 | 365 | 240 | 205 | 267 | 310 |
| China | 244 | 260 | 268 | 430 | 311 | 350 |
| Hong Kong | 272 | 299 | 312 | 344 | 390 | . |
| Iraq | 673 | 698 | 625 | 661 | 656 | 620 |
| Japan | 854 | 888 | 936 | 973 | 1.056 | 1.140 |
| Russian Federation | 512 | 444 | 250 | 220 | 225 | 225 |
| Saudi Arabia | 838 | 762 | 863 | 886 | 790 | 575 |
| United Arab. Emirates | 217 | 225 | 277 | 296 | 417 | 408 |
| Exports of broiler meat | | | | | | |
| Argentina | 334 | 278 | 187 | 158 | 178 | 125 |
| Belarus | 105 | 113 | 135 | 145 | 145 | . |
| Brazil | 3482 | 3558 | 3841 | 3889 | 3847 | 3685 |
| Chile | 88 | 87 | 99 | . | . | . |
| China | 420 | 430 | 401 | 386 | 436 | 460 |
| Thailand | 504 | 546 | 622 | 690 | 757 | 850 |
| Turkey | 337 | 348 | 292 | 263 | 357 | 380 |
| Ukraine | 141 | 158 | 158 | 236 | 262 | 300 |
| USA | 3.332 | 3.359 | 2.932 | 3.086 | 3.140 | 3.158 |

Sources: MEG to USDA and national data.

“ AVEC calls on the Commission to reinforce border controls on imported poultry meat. ”

Consumption

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Austria | 20,6 | 21,1 | 21,3 | 21,6 | 21,2 | 21,0 |
| Belgium / Luxembourg | . | . | . | . | . | . |
| Czech Republic | 22,5 | 22,5 | 23,0 | 23,2 | 23,5 | 24,0 |
| Denmark | . | 24,0 | 24,7 | 24,5 | 23,1 | 24,0 |
| Finland | 18,1 | 19,2 | 19,6 | 20,7 | 23,1 | 24,2 |
| France | 26,0 | 26,5 | 27,1 | 26,5 | 28,0 | 28,9 |
| Germany | 19,4 | 19,5 | 20,1 | 20,8 | 20,8 | 22,2 |
| Greece | 21,2 | 22,3 | 20,9 | 20 | 18,9 | 19 |
| Hungary | 30,0 | 30,5 | 30,8 | 31,1 | 32,0 | 32,5 |
| Ireland | 30,3 | 30,4 | 31,7 | 35,2 | 34,0 | 35,0 |
| Italy | 19,0 | 18,8 | 19,7 | 20,3 | 20,7 | 20,5 |
| Latvia | 19,5 | 19,5 | 22,0 | 23,0 | 22,5 | . |
| Lithuania | 23,0 | 22,8 | 22,9 | 23,5 | 24,0 | 24,5 |
| Netherlands | 22,3 | 22,5 | 22,1 | 22,2 | 22,1 | 22,2 |
| Poland | 26,5 | 28,2 | 27,1 | 29,2 | 27,6 | 27,2 |
| Portugal | 34,1 | 35,1 | 36,2 | 37,0 | 35,1 | 37,0 |
| Slovakia | 20,0 | 19,8 | 19,9 | 20,1 | 21,0 | 20,5 |
| Spain | 30,5 | 30,8 | 31,0 | 31,4 | 30,5 | 31,3 |
| Sweden | 18,8 | 19,8 | 20,8 | 21,9 | 22,0 | 21,9 |
| United Kingdom | 28,7 | 28,5 | 27,3 | 28,7 | 28,9 | 29,7 |
| EU | 21,4 | 22,0 | 22,9 | 23,8 | 23,7 | 24,1 |
| Switzerland | 17,9 | 18,6 | 19,0 | 18,9 | 17,8 | 18,4 |

Note: Partial provisional or estimated.

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

Consumption

8. Self-sufficiency in poultry meat (%)

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|------------|------------|------------|------------|------------|------------|
| Austria | 70 | 67 | 67 | 68 | 71 | 72 |
| Belgium / Luxembourg | . | . | . | . | . | . |
| Czech Republic | 72 | 72 | 69 | 69 | 68 | 67 |
| Denmark | . | . | . | . | . | . |
| Finland | 105 | 103 | 99 | 97 | 95 | 98 |
| France | 107 | 105 | 104 | 104 | 99 | 96 |
| Germany | 110 | 112 | 110 | 106 | 105 | 99 |
| Greece | 78 | 79 | 79 | 75 | 75 | 76 |
| Hungary | 137 | 139 | 143 | 140 | 127 | 130 |
| Ireland | 100 | 99 | 95 | 89 | 93 | 91 |
| Italy | 107 | 107 | 107 | 109 | 108 | 107 |
| Latvia | 62 | 64 | 65 | 64 | 70 | . |
| Lithuania | 112 | 115 | 112 | 112 | 115 | 111 |
| Netherlands | 194 | 196 | 185 | 188 | 186 | . |
| Poland | 178 | 189 | 211 | 219 | 240 | 255 |
| Slovakia | 72 | 75 | 75 | 73 | 70 | . |
| Spain | 101 | 105 | 103 | 105 | 102 | 105 |
| Sweden | 96 | 98 | 99 | 103 | 105 | . |
| United Kingdom | 97 | 98 | 94 | 93 | 95 | 96 |
| EU | 104 | 104 | 104 | 105 | 105 | 106 |

Note: Partial provisional or estimated.

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

“ The capacity of poultry to recycle feedstuffs unsuitable for humans should be developed to master the impact on deforestation. ”

Broiler

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Austria | 89 | 91 | 93 | 108 | 108 | 110 |
| Belgium / Luxembourg | 380 | 425 | 445 | 453 | 455 | 465 |
| Bulgaria | 77 | 80 | 85 | 86 | 87 | 87 |
| Cyprus | 23 | 23 | 23 | 24 | 25 | 25 |
| Czech Republic | 155 | 161 | 160 | 159 | 165 | 175 |
| Denmark | 168 | 173 | 146 | 155 | 154 | 155 |
| Estonia | 17 | 17 | 20 | 20 | 20 | 21 |
| Finland | 104 | 106 | 108 | 113 | 122 | 130 |
| France | 1.146 | 1.116 | 1.139 | 1.133 | 1.163 | 1.174 |
| Germany | 1.220 | 1.280 | 1.285 | 1.290 | 1.300 | 1.340 |
| Greece | 178 | 188 | 173 | 156 | 151 | 150 |
| Hungary | 305 | 329 | 365 | 394 | 409 | 414 |
| Ireland | 117 | 118 | 110 | 160 | 180 | 190 |
| Italy | 863 | 872 | 929 | 981 | 1.034 | 1.013 |
| Croatia | 58 | 57 | 69 | 67 | 67 | 68 |
| Latvia | 27 | 29 | 30 | 30 | 33 | 33 |
| Lithuania | 87 | 94 | 105 | 105 | 110 | 113 |
| Malta | 4 | 4 | 4 | 4 | 4 | 4 |
| Netherlands | 750 | 926 | 1.046 | 1.081 | 1.100 | 1.100 |
| Poland | 1.395 | 1.568 | 1.699 | . | 2.055 | 2.156 |
| Portugal | 259 | 261,6 | 271 | 278 | 287 | 289 |
| Romania | 310 | 310 | 350 | 360 | 388 | 400 |
| Slovakia | 68 | 69 | 70 | 57 | 80 | 80 |
| Slovenia | 53 | 55 | 54 | 62 | 63 | 60 |
| Spain | 1.041 | 1.053 | 1.203 | 1.268 | 1.250 | 1.300 |
| Sweden | 90 | 103 | 113 | 136 | 148 | 144 |
| United Kingdom | 1.391 | 1.383 | 1.456 | 1.535 | 1.630 | 1.685 |
| EU | 10.374 | 10.892 | 11.551 | 12.092 | 12.587 | 12.879 |
| Argentina | 2.060 | 2.110 | 2.085 | 2.119 | 2.150 | 2.175 |
| Brazil | 12.663 | 12.946 | 13.547 | 13.523 | 13.612 | 13.550 |
| China | 13.350 | 13.156 | 13.561 | 12.448 | 11.600 | 11.700 |
| India | 3.450 | 3.930 | 4.115 | 4.427 | 4.640 | 4.855 |
| Indonesia | 1.550 | 1.565 | 1.625 | 1.640 | 1.640 | . |
| Iran | 1.962 | 1.962 | 1.962 | 1.963 | 1.962 | . |
| Mexico | 2.907 | 3.025 | 3.175 | 3.275 | 3.400 | 3.500 |
| Russia | 3.010 | 3.958 | 4.222 | 4.328 | 4.658 | 4.725 |
| South-Africa | 1.497 | 1.497 | 1.497 | 1.500 | 1.500 | . |
| Thailand | . | 2.499 | 2.692 | 2.813 | 2.990 | 3.120 |
| USA | 16.976 | 17.542 | 18.208 | 18.510 | 18.938 | 19.350 |
| World | 110.415 | 113.308 | 116.444 | 120.137 | 122.007 | 124.000 |

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

Broiler

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Austria | 13,3 | 13,9 | 14,2 | 14,6 | 14,5 | 14,6 |
| France | 16,2 | 16,9 | 17,2 | 18,0 | 19,0 | 19,5 |
| Germany | 11,7 | 11,8 | 12,4 | 12,9 | 13,3 | 14,3 |
| Italy | 11,7 | 11,9 | 12,5 | 12,5 | . | . |
| Netherlands | 20,4 | 20,6 | 20,3 | 20,2 | 20,4 | . |
| Portugal | . | 26,0 | . | . | . | . |
| United Kingdom | 22,5 | 22,5 | 22,9 | 23,2 | . | . |
| EU | 17,2 | 18,0 | 18,5 | 19,2 | 19,4 | 19,7 |
| Third countries | | | | | | |
| Argentina | 40,6 | 42,6 | 43,7 | 44,9 | 44,7 | 46,3 |
| Brazil | 43,6 | 46,0 | 47,1 | 46,4 | 46,7 | 46,8 |
| China | 9,3 | 9,1 | 9,4 | 8,7 | 8,0 | 8,0 |
| India | 2,7 | 3,0 | 3,1 | 3,3 | 3,5 | 3,6 |
| Japan | 17,2 | 19,4 | 19,6 | 20,3 | 21,1 | 22,2 |
| Mexico | 29,2 | 30,1 | 31,5 | 31,8 | 32,5 | 33,4 |
| South Africa | 28,9 | 30,9 | 32,1 | 32,2 | 31,6 | 32,4 |
| USA | 43,4 | 44,8 | 47,7 | 48,1 | 48,8 | 49,7 |

Note: Partial provisional or estimated

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

“ The EU poultry sector will not accept being traded off against other sectors to reach free trade agreements. ”

Turkey

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Austria | 22 | 21 | 20 | 22 | 22 | 22 |
| Belgium / Luxembourg | 9 | 8 | 8 | 8 | 8 | 8 |
| Bulgaria | 1 | 1 | 1 | 0 | 0 | 0 |
| Croatia | 9 | 10 | 13 | 13 | 12 | 13 |
| Cyprus | 0 | 0 | 0 | 0 | 0 | 0 |
| Czech Republic | 5 | 5 | 6 | 9 | 7 | 7 |
| Denmark | 2 | 2 | 1 | 1 | 1 | 1 |
| Finland | 7 | 7 | 8 | 8 | 8 | 9 |
| France | 359 | 366 | 355 | 382 | 369 | 355 |
| Germany | 384 | 392 | 396 | 407 | 387 | 360 |
| Greece | 3 | 3 | 3 | 3 | 3 | 3 |
| Hungary | 89 | 93 | 97 | 101 | 97 | 98 |
| Ireland | 28 | 26 | 26 | 26 | 25 | 27 |
| Italy | 314 | 310 | 313 | 331 | 309 | 300 |
| Malta | 0 | 0 | 0 | 0 | 0 | 0 |
| Netherlands | 28 | 28 | 28 | 28 | 28 | 28 |
| Poland | 280 | 280 | 312 | . | 376 | 384 |
| Portugal | 39 | 37 | 38 | 38 | 40 | 42 |
| Romania | 10 | 11 | 12 | 10 | 10 | 15 |
| Slovakia | 0 | 0 | 0 | 1 | 1 | 1 |
| Slovenia | 4 | 4 | 5 | 5 | 5 | 6 |
| Spain | 177 | 181 | 171 | 187 | 200 | 235 |
| Sweden | 4 | 4 | 4 | 4 | 5 | 6 |
| United Kingdom | 187 | 172 | 177 | 164 | 151 | 158 |
| EU | 1.958 | 1.961 | 1.992 | 2.096 | 2.063 | 2.074 |
| Brazil | 520 | 470 | 480 | 596 | 586 | . |
| Canada | 168 | 168 | 172 | 183 | 171 | . |
| Mexico | 17 | 19 | 19 | 17 | 16 | . |
| Russia | 100 | 105 | 105 | 110 | 100 | . |
| South Africa | 53 | 53 | . | . | . | . |
| USA | 2.634 | 2.611 | 2.552 | 2.713 | 2.713 | 2.672 |
| World | 5.653 | 5.639 | 5.654 | 6.070 | 5.948 | 5.980 |

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)

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|------------------------|------------|------------|------------|------------|------------|------------|
| Austria | 5,9 | 5,8 | 5,5 | 5,5 | 5,3 | 5,3 |
| France | 5,2 | 5,1 | 4,6 | 4,8 | 4,7 | 4,7 |
| Germany | 5,8 | 5,9 | 5,9 | 6,0 | 5,7 | 6,0 |
| Italy | 4,8 | 4,9 | 4,9 | . | . | . |
| Netherlands | 1,1 | 1,1 | 1,1 | . | . | . |
| Portugal | 5,0 | 4,9 | . | . | . | . |
| United Kingdom | 4,2 | 4,1 | . | . | . | . |
| EU | 3,7 | 3,7 | 3,7 | 4,0 | 3,9 | 4,0 |
| Third countries | | | | | | |
| Brazil | 1,7 | 1,8 | . | . | . | . |
| Canada | 4,1 | 4,1 | . | . | . | . |
| Mexico | 1,4 | 1,4 | . | . | . | . |
| Russia | 0,8 | 0,8 | . | . | . | . |
| USA | 7,3 | 7,2 | 7,3 | 7,5 | 7,4 | 7,3 |

Note: Partial provisional or estimated.

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

“ It is essential to make MEPs aware of the sensitivity of the European poultry sector to matters such as trade. ”

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|---------------|---------------|---------------|---------------|---------------|--------------|
| Austria | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 |
| Belgium / Luxembourg | 0,0 | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 |
| Bulgaria | 21,0 | 22,0 | 20,3 | 22,5 | 19,6 | 22,0 |
| Cyprus | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 |
| Czech Republic | 4,8 | 7,3 | 8,0 | 9,0 | 11,1 | 11,4 |
| Denmark | 3,5 | 3,5 | 4,0 | 1,0 | 1,8 | 1,8 |
| Estonia | . | . | . | . | . | . |
| Finland | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 |
| France | 229,3 | 230,1 | 231,6 | 206,2 | 203,6 | 220,3 |
| Germany | 51,3 | 51,1 | 50,3 | 48,5 | 40,5 | 41,2 |
| Greece | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 |
| Hungary | 76,5 | 79,8 | 84,0 | 79,5 | 68,0 | 99,8 |
| Ireland | 4,0 | 4,5 | 5,1 | 5,2 | 5,8 | 6,2 |
| Italy | 13,0 | 11,0 | 9,0 | 6,9 | 5,5 | 6,0 |
| Latvia | . | . | . | . | . | . |
| Lithuania | 0,3 | 0,1 | 0,1 | 0,1 | 0,1 | 0,1 |
| Malta | . | . | . | . | . | . |
| Netherlands | 17,0 | 15,0 | 16,0 | 16,0 | 18,0 | 19,0 |
| Poland | 28,5 | 41,4 | 44,6 | 59,1 | 47,5 | 48,5 |
| Portugal | 8,0 | 8,7 | 9,9 | 10,0 | 10,1 | 10,5 |
| Romania | . | . | . | . | . | . |
| Slovakia | 0,4 | 0,5 | 0,4 | 0,4 | 0,4 | 0,4 |
| Slovenia | . | . | . | . | . | . |
| Spain | 5,0 | 5,0 | 2,0 | 4,1 | 3,7 | 3,2 |
| Sweden | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 | 0,0 |
| United Kingdom | 30,4 | 32,1 | 29,2 | 30,0 | 30,6 | 30,9 |
| EU | 496,0 | 532,0 | 523,0 | 510,0 | 475,0 | 530,0 |
| World | 4426,0 | 4378,4 | 4355,5 | 4489,6 | 4460,2 | . |

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.

For further data and information:

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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 | Annual growth (%) | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------|
| | | | | | | | | | | | | | | 2018-2006 | 2030-2018 |
| Gross indigenous production | 14 889 | 14 903 | 14 985 | 15 048 | 15 097 | 15 140 | 15 183 | 15 228 | 15 280 | 15 331 | 15 382 | 15 428 | 15 475 | 2,5% | 0,3% |
| of which EU-15 | 10 800 | 10 762 | 10 808 | 10 837 | 10 853 | 10 864 | 10 874 | 10 887 | 10 903 | 10 921 | 10 938 | 10 951 | 10 966 | 1,9% | 0,1% |
| of which EU-N13 | 4 089 | 4 141 | 4 177 | 4 211 | 4 244 | 4 276 | 4 309 | 4 341 | 4 376 | 4 411 | 4 444 | 4 476 | 4 509 | 4,5% | 0,8% |
| Consumption | 14 074 | 14 182 | 14 300 | 14 351 | 14 372 | 14 378 | 14 400 | 14 415 | 14 442 | 14 468 | 14 495 | 14 524 | 14 554 | 2,2% | 0,3% |
| of which EU-15 | 11 234 | 11 335 | 11 451 | 11 495 | 11 508 | 11 507 | 11 525 | 11 534 | 11 555 | 11 580 | 11 600 | 11 624 | 11 645 | 2,4% | 0,3% |
| of which EU-N13 | 2 840 | 2 847 | 2 848 | 2 856 | 2 864 | 2 871 | 2 876 | 2 880 | 2 886 | 2 888 | 2 894 | 2 900 | 2 910 | 1,2% | 0,2% |
| per capita consumption (kg r.w.e.)* | 24,1 | 24,3 | 24,4 | 24,5 | 24,5 | 24,5 | 24,5 | 24,5 | 24,6 | 24,6 | 24,7 | 24,7 | 24,8 | 1,9% | 0,2% |
| of which EU-15 | 24,1 | 24,3 | 24,4 | 24,5 | 24,5 | 24,4 | 24,5 | 24,4 | 24,5 | 24,5 | 24,5 | 24,5 | 24,6 | 2,0% | 0,1% |
| of which EU-N13 | 24,1 | 24,2 | 24,2 | 24,4 | 24,5 | 24,7 | 24,8 | 24,9 | 25,1 | 25,2 | 25,3 | 25,5 | 25,7 | 1,4% | 0,5% |
| Imports (meat) | 766 | 854 | 920 | 940 | 944 | 948 | 949 | 949 | 948 | 949 | 950 | 951 | 950 | 0,3% | 1,8% |
| Exports (meat) | 1 580 | 1 574 | 1 605 | 1 638 | 1 670 | 1 711 | 1 731 | 1 763 | 1 786 | 1 812 | 1 837 | 1 855 | 1 871 | 5,0% | 1,4% |
| Net trade (meat) | 815 | 721 | 685 | 697 | 725 | 763 | 782 | 814 | 838 | 863 | 887 | 904 | 920 | 16,0% | 1,0% |
| EU market price in EUR/t | 1 913 | 1 833 | 1 888 | 1 919 | 1 886 | 1 862 | 1 866 | 1 869 | 1 864 | 1 855 | 1 849 | 1 853 | 1 858 | 2,0% | -0,2% |
| World market price in EUR/t | 1 340 | 1 364 | 1 424 | 1 448 | 1 423 | 1 404 | 1 407 | 1 410 | 1 407 | 1 401 | 1 396 | 1 399 | 1 404 | 3,0% | 0,4% |
| World market price in USD/t | 1 546 | 1 573 | 1 606 | 1 637 | 1 641 | 1 652 | 1 667 | 1 678 | 1 679 | 1 676 | 1 675 | 1 681 | 1 690 | 2,3% | 0,7% |

*retail weight equivalent; coefficient to transform carcass weight into retail weight is 0,88 for poultry meat

Source: EU Agricultural Outlook, for the agricultural markets and income 2018-2030, The European Commission, DG AGRI, December 2018 (https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/medium-term-outlook-2018-report_en.pdf)

Projections

15. Aggregate meat market projections for the EU, 2018–2030 ('000 tonnes carcass weight equivalent)

| | | | | | | | | | | | | | | Annual growth (%) | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|--------------|
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2018-2006 | 2030-2018 |
| Gross indigenous production | 48 057 | 47 830 | 47 834 | 47 793 | 47 792 | 47 790 | 47 782 | 47 758 | 47 744 | 47 755 | 47 769 | 47 769 | 47 765 | 1,0% | -0,1% |
| of which EU-15 | 39 208 | 39 043 | 39 002 | 38 883 | 38 818 | 38 762 | 38 710 | 38 646 | 38 595 | 38 569 | 38 546 | 38 511 | 38 478 | 0,9% | -0,2% |
| of which EU-N13 | 8 849 | 8 787 | 8 831 | 8 910 | 8 973 | 9 028 | 9 073 | 9 112 | 9 149 | 9 186 | 9 223 | 9 258 | 9 288 | 1,3% | 0,4% |
| Imports of live animals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | -8,9% | -2,7% |
| Exports of live animals | 299 | 303 | 298 | 294 | 290 | 285 | 279 | 274 | 268 | 262 | 256 | 251 | 245 | 10,7% | -1,6% |
| Net production | 47 759 | 47 528 | 47 536 | 47 500 | 47 502 | 47 505 | 47 503 | 47 485 | 47 477 | 47 493 | 47 513 | 47 519 | 47 521 | 1,0% | 0,0% |
| Consumption | 44 525 | 44 607 | 44 596 | 44 566 | 44 533 | 44 495 | 44 467 | 44 408 | 44 364 | 44 333 | 44 319 | 44 298 | 44 288 | 0,5% | 0,0% |
| of which EU-15 | 36 065 | 36 197 | 36 216 | 36 202 | 36 186 | 36 165 | 36 156 | 36 113 | 36 088 | 36 079 | 36 082 | 36 075 | 36 075 | 0,5% | 0,0% |
| of which EU-N13 | 8 460 | 8 410 | 8 381 | 8 365 | 8 347 | 8 330 | 8 311 | 8 295 | 8 276 | 8 254 | 8 238 | 8 223 | 8 213 | 0,5% | -0,2% |
| per capita consumption (kg r.w.e.)* | 69,3 | 69,3 | 69,2 | 69,1 | 69,0 | 69,0 | 68,9 | 68,8 | 68,7 | 68,7 | 68,7 | 68,7 | 68,7 | 0,3% | -0,1% |
| of which EU-15 | 70,2 | 70,2 | 70,1 | 70,0 | 69,8 | 69,7 | 69,6 | 69,5 | 69,4 | 69,3 | 69,2 | 69,2 | 69,1 | 0,2% | -0,1% |
| of which EU-N13 | 65,9 | 65,6 | 65,6 | 65,7 | 65,7 | 65,8 | 65,9 | 66,0 | 66,2 | 66,3 | 66,4 | 66,6 | 66,8 | 0,8% | 0,1% |
| of which beef and veal meat | 11,0 | 10,9 | 10,8 | 10,7 | 10,6 | 10,6 | 10,6 | 10,5 | 10,5 | 10,4 | 10,4 | 10,4 | 10,4 | -0,8% | -0,5% |
| of which sheep and goat meat | 1,7 | 1,7 | 1,8 | 1,8 | 1,8 | 1,8 | 1,8 | 1,8 | 1,8 | 1,9 | 1,9 | 1,9 | 1,9 | -3,0% | 0,7% |
| of which pig meat | 32,5 | 32,4 | 32,2 | 32,2 | 32,1 | 32,1 | 32,0 | 31,9 | 31,9 | 31,8 | 31,7 | 31,7 | 31,6 | -0,1% | -0,2% |
| of which poultry meat | 24,1 | 24,3 | 24,4 | 24,5 | 24,5 | 24,5 | 24,5 | 24,5 | 24,6 | 24,6 | 24,7 | 24,7 | 24,8 | 1,9% | 0,2% |
| Imports (meat) | 1 258 | 1 353 | 1 448 | 1 494 | 1 507 | 1 527 | 1 539 | 1 540 | 1 546 | 1 551 | 1 563 | 1 563 | 1 564 | -2,4% | 1,8% |
| Exports (meat) | 4 490 | 4 293 | 4 388 | 4 418 | 4 468 | 4 536 | 4 575 | 4 616 | 4 660 | 4 710 | 4 759 | 4 788 | 4 799 | 5,1% | 0,6% |
| Net trade (meat) | 3 232 | 2 939 | 2 940 | 2 923 | 2 961 | 3 009 | 3 036 | 3 076 | 3 113 | 3 159 | 3 196 | 3 224 | 3 235 | 12,6% | 0,0% |

* 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 2018-2030, The European Commission, DG AGRI, December 2018 (https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/medium-term-outlook-2018-report_en.pdf)

EU28 poultry meat import trade, main tariff lines, 2010, 2015, 2017, 2018

IMPORTS

| CN CODE | Product definition | QUANTITY 100 KG | | | | VALUE €/100kg | |
|-----------------------|---|-----------------|-----------|-----------|-----------|---------------|--------|
| | | 2010 | 2015 | 2017 | 2018 | 2017 | 2018 |
| 0207 (poultry) | MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN | 1 774 509 | 1 545 115 | 1 606 954 | 2 332 858 | 199,43 | 219,95 |
| 02071290 | Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens' | 114 059 | 101 425 | 101 367 | 160 058 | 131,81 | 126,87 |
| 02071310 | Fresh or chilled boneless cuts of fowls of the species Gallus Domesticus | 4 181 | 84 397 | 121 427 | 111 844 | 223,92 | 251,96 |
| 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) | 80 | 0 | 271 270 | 555 642 | 143,90 | 164,40 |
| 02071410 | Frozen boneless cuts of fowls of the species Gallus domesticus | 1 018 233 | 960 827 | 789 616 | 1 257 584 | 233,08 | 252,95 |
| 02071460 | Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in | 120 717 | 56 336 | 51 744 | 35 509 | 113,22 | 106,43 |
| 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) | 30 487 | 13 476 | 6 078 | 2 807 | 125,66 | 135,23 |
| 02072710 | Frozen boneless cuts of turkeys of the species domesticus | 144 332 | 103 235 | 112 469 | 137 991 | 338,95 | 326,94 |
| 02109939 | MEAT, SALTED, IN BRINE, DRIED OR SMOKED | 1 956 433 | 2 654 064 | 2 113 419 | 1 757 493 | 215,67 | 269,00 |
| 1602 (poultry) | PREPARED/PRESERVED MEAT | 4 287 212 | 3 866 031 | 3 892 124 | 3 380 607 | 317,54 | 322,10 |
| 160231 | TURKEYS | 844 277 | 490 302 | 396 656 | 133 521 | 325,24 | 325,36 |
| 16023111 | Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products) | 927 933 | 471 960 | 380 104 | 123 748 | 317,20 | 296,99 |
| 160232 | GALLUS DOMESTICUS | 3 305 465 | 3 216 857 | 3 326 304 | 3 085 751 | 309,20 | 317,13 |
| 16023211 | Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry | 382 160 | 143 244 | 99 998 | 33 434 | 202,20 | 249,38 |
| 16023219 | Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry | 1 618 695 | 2 416 897 | 2 652 083 | 2 746 360 | 337,04 | 326,20 |
| 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 | 638 260 | 548 298 | 284 673 | 193,63 | 237,23 |
| 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 | 18 455 | 25 925 | 21 284 | 317,50 | 321,55 |
| 160239 | OTHER | 137 470 | 158 872 | 169 164 | 161 335 | 463,48 | 414,45 |
| 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 | 155 799 | 164 406 | 158 162 | 465,57 | 414,94 |

Source: Extraction Eurostat, June 2019

EU28 poultry meat export trade, main tariff lines, 2010, 2015, 2017, 2018

EXPORTS

| CN CODE | Product definition | QUANTITY 100 KG | | | | VALUE €/100kg | |
|-----------------------|--|-----------------|------------|------------|------------|---------------|--------|
| | | 2010 | 2015 | 2017 | 2018 | 2017 | 2018 |
| 0207 (poultry) | MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN | 11 243 986 | 13 244 390 | 14 629 070 | 15 514 754 | 95,87 | 90,54 |
| 02071210 | Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens', | 236 445 | 164 133 | 146 143 | 147 066 | 97,06 | 95,17 |
| 02071290 | Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens', | 2 787 185 | 2 752 743 | 2 425 861 | 2 164 585 | 115,45 | 119,21 |
| 02071410 | Frozen boneless cuts of fowls of the species Gallus domesticus | 1 872 421 | 2 085 660 | 2 923 391 | 3 211 492 | 48,30 | 46,84 |
| 02071420 | Frozen halves or quarters of fowls of the species Gallus domesticus | 1 077 780 | 1 587 412 | 1 639 309 | 1 787 393 | 92,10 | 89,71 |
| 02071430 | Frozen whole wings, with or without tips of Gallus domesticus | 946 828 | 1 636 215 | 1 741 416 | 1 969 443 | 124,10 | 109,02 |
| 02071460 | Frozen legs and cuts thereof of fowls of the species gallus | 489 997 | 989 773 | 1 208 763 | 1 334 718 | 93,53 | 88,07 |
| 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 | 607 181 | 773 755 | 777 791 | 667 128 | 88,35 | 92,51 |
| 02072710 | Frozen boneless cuts of turkeys of the species domesticus | 306 905 | 229 196 | 253 568 | 216 878 | 96,33 | 102,19 |
| 02072730 | Frozen whole wings, with or without tips, of turkeys | 217 389 | 358 435 | 398 699 | 336 436 | 123,58 | 109,81 |
| 0207 other | | 2 701 855 | 2 667 068 | 3 114 129 | 3 679 615 | 110,61 | 100,24 |
| 1602 (poultry) | PREPARED/PRESERVED MEAT | 451 728 | 379 993 | 409 206 | 437 885 | 356,23 | 369,64 |
| 16023119 | Meat or offal of turkeys "poultry", prepared or preserved, containing- >= 57% by weight of meat or offal of poultry | 16 079 | 40 314 | 43 274 | 51 878 | 411,75 | 401,49 |
| 16023219 | Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry | 137 132 | 171 993 | 201 965 | 215 231 | 337,74 | 354,73 |
| 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 | 60 222 | 61 077 | 67 516 | 346,57 | 356,86 |
| 1602 other | | 243 490 | 107 464 | 102 890 | 103 260 | 374,90 | 393,06 |

Source: Extraction Eurostat, June 2019



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