AVEC
THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

Annual report

2021

AVEC
THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

European poultry is produced with care

EU producers believe in the farm to fork principle where problems are solved when they arise

European poultry meat is climate smart

The poultry meat sector contributes to the EU economy, especially in rural areas

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

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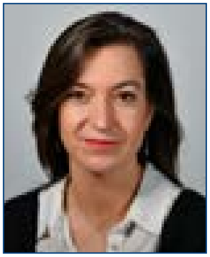

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Introduction

2021… was a year where the **COVID-19 pandemic** still had a significant impact on the agenda of the European poultry meat sector. During the spring of 2021, the reopening of economies, as vaccination levels accelerated, helped the recovery of food-service demand – which is very important for the poultry sector, since on average it makes up one-third of demand for poultry. The COVID-19 pandemic was not the only challenging factor for the European poultry meat sector in 2021… **a perfect storm** is over us.

Outbreaks of **Highly Pathogenic Avian Influenza** (HPAI) caused a lot of difficulties in many European countries. Bans on exports to many third countries were put in place. Hopefully, some of the problems with trade after an outbreak of HPAI will be diminished in the future after the OIE (the World Organisation for Animal Health) changed the guidelines for HPAI in May 2021. For instance, the former three-month import ban in cases of HPAI outbreaks has been reduced to 28 days.

The aftermath of **Brexit** is another part of the perfect storm. The new status of UK as a third country creates a lot of logistical challenges for the trade between EU and the UK. Until now, this has mostly impacted the UK side since the new rules on exports from the UK to the EU were implemented on 1 January 2021. The UK experience so far has been characterised by a lot of challenges, as well as increased costs, mainly due to an increased administrative burden. There is a significant risk that EU exports to the UK will face the same challenges when the new rules on exports from the EU to the UK come fully into force on 1 January 2022 (with initial challenges expected from October 2021 when requirements for health certificates commence).

Feed prices increased even further in 2021 due to unfortunate weather in key producing countries and a huge import demand from China, where the meat industry is recovering fast. This is a big challenge for European chicken producers, as feed represents 60–70% of the production cost.

The **perception of the European poultry meat sector** among NGOs, key opinion leaders and policy makers is also a challenge. The sector is often described as very industrial, with the birds seen as being deprived of the possibility of experiencing “good lives”, and there is strong pressure from different NGOs to enhance the animal welfare of commercially produced European poultry.

Now the EU **Farm to Fork Strategy** is being discussed in detail in the EU Parliament – and it will also be one of the very important topics of the EU Council in the second half of 2021. The European Commission has set out an ambitious timeline for putting the different initiatives in the strategy into legislation – for instance it expects to launch a revised version of the EU legislation on Animal Welfare in 2023.

In the middle of this perfect storm, AVEC believes it is very important to highlight that European poultry meat is already setting a global standard for meat that is safe, nutritious and of high quality. We simply must keep the licence to produce poultry meat in Europe in order to deliver our high-quality products to the EU consumers.

In the current political climate, there is a tendency to base discussions of Europe’s future food system on emotions rather than science. AVEC is – and will remain – an active stakeholder in the discussions on the implementation of the Farm to Fork Strategy, and we underline that all legislation must be based on clear science.

Paul Lopez **Birthe Steenberg**

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Sustainable production

"European poultry meat is produced under the highest standards of animal health and welfare, food safety and environmental protection in the world. This is why poultry meat is part of the solution when it comes to the Farm to Fork Strategy!"

Our association

Who are we?

AVEC is the voice of the European poultry meat sector. We represent the sector to international and EU decision-makers and focus on key areas such as animal health and welfare, food safety and quality, trade, and sustainability.

Our core aims:

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

Our members are national organisations representing poultry processors and the poultry trade in 16 EU countries and the UK. AVEC's members represent 95% of European poultry meat production.

Administrative structure

The AVEC secretariat is based in Brussels, where Secretary General Birthe Steenberg, Senior Policy Advisor Paul-Henri Lava, Policy Adviser Nadia Khaldoune and Project Manager Federica Chiarella work to effectively serve the European poultry meat sector.

The presidency and the board

The president of AVEC is Paul Lopez from the French association FIA (Fédération des Industries Avicoles). He chairs AVEC's board meetings and the general assembly, and participates in the different working groups. The AVEC general assembly takes place on an annual basis, usually in September or October, with up to 150 delegates participating.

AVEC working groups:

AVEC's work is structured around a series of working groups, where technical discussions result in positions that serve to advise the board.

In order to adapt to the COVID-19 situation and travel restrictions, the working groups met remotely for most of 2020 and the first half of 2021. Additional topic-specific meetings have been held by the different working groups.

There are five working groups covering the following key areas:

- **Animal health and welfare**
- **Food safety and food quality**
- **Sustainability**
- **Trade/promotion**
- **Communication**

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 16 EU Member States and in the UK. AVEC's members are actively working to reduce antibiotic use in the poultry sector under the principle: as little as possible but as much as needed.

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BELGIUM	Philip Eeckman	Ann Truyen
DENMARK	Stig Munck Larsen	Kristian Kristensen
FINLAND	Terhi Virtanen	Matti Perälä
FRANCE	Paul Lopez	Yann Brice
GERMANY	Franz-Josef Rothkötter	Thomas Janning
HUNGARY	Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
LATVIA	Anna Erliha	Saulius Petkevičius
NETHERLANDS	Gert Jan Oplaat	Peter Vesseur
POLAND	Zbigniew Idziaszek	Dariusz Goszczyński
PORTUGAL	Avelino Gaspar	Dinis dos Santos
ROMANIA	Ilie Van	Ovidiu Oprita
SLOVENIA	Enver Šišič	Janez Rebec
SPAIN	Antonio Sánchez	Jordi Montfort
SWEDEN	Maria Donis	Magnus Lagergren
UNITED KINGDOM	Philip Wilkinson	Richard Griffiths

“AVEC members are working actively to reduce antibiotic use in the poultry sector under the principle: as little as possible but as much as needed”

EU and international key partners

AVEC cooperates with many other international organisations depending on the issues at hand. AVEC maintains 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.

ELPHA and EPB

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, animal health, animal welfare and genetics. ELPHA also recognises that food safety and security start 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.

AVEC is a part of European Livestock Voice – a multi-stakeholder group of 11 like-minded partners in the livestock food chain that have united to bring balance to the debate around a sector that plays such an essential role in Europe's rich heritage and future. The associations involved, which represent sectors ranging from animal health to feed, to breeding and animal farming and farmers, aim to inform the public about the societal value of livestock production and its contribution to global challenges, offering an alternative narrative to current debates. European Livestock Voice has created a website (meatthefacts.eu) with factual information about production practices and key information on the livestock sector in Europe.

In addition to AVEC, the stakeholders in European Livestock Voice are:

Animal health

Meat processors

Farmers and cooperatives

Leather

Breeders

Foie gras

Livestock and meat

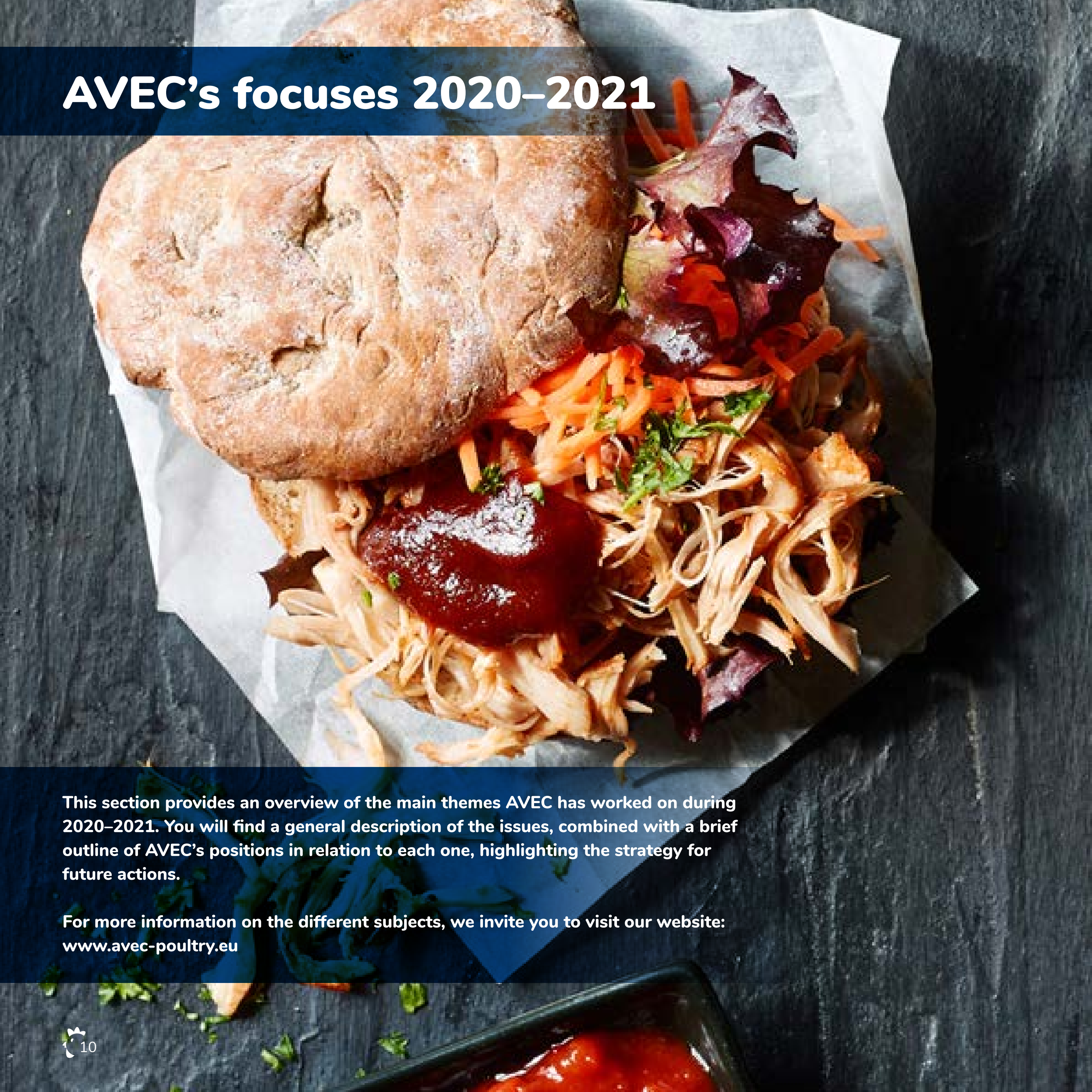
Feed

Feed additives

Fur

AVEC, a member of the International Poultry Council

The objectives of the International Poultry Council (IPC) 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.



AVEC's focuses 2020–2021

This section provides an overview of the main themes AVEC has worked on during 2020–2021. You will find a general description of the issues, combined with a brief outline of AVEC's positions in relation to each one, 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

This working group focuses on improving the health and welfare of European poultry raised for slaughter, and is chaired by Harald Schliessnig from Austria. It brings together experts on animal health and welfare from across AVEC's membership.

Chair, Harald Schliessnig

Animal welfare

"What needs to change in the broiler chicken production chain in the EU to improve animal welfare?" That is the question the NGOs keep asking our sector.

In 2020 and 2021, AVEC participated in many meetings about broiler welfare. And one thing is very clear: we should not create new legislation on animal welfare, but instead ensure that the existing legislation is implemented correctly.

The focus should be on improving animal-based welfare indicators by using modern techniques and IT systems in our slaughterhouses. By doing this, we could illustrate the improvements we have achieved in specific areas – such as foot pad lesions and hock burns in broilers – and in husbandry management in general.

Sustainable farm to fork

This year, members of the EU Parliament from the AGRI and ENVI Committees prepared an opinion on the Farm to Fork Strategy[1] proposed by the Commission. This led to intense discussions, and more than 2,295 amendments have been submitted. This marked a major achievement for AVEC, who put a lot of hard work and effort into reviewing all the amendments and contacting several MEPs to submit our comments and suggestions. Once finalised, the report will be sent to plenary for adoption in September 2021.

For the AHAW working group, key discussions are driven by animal welfare practices at all stages of production, and especially during transport.

Antimicrobial resistance and the use of veterinary antibiotics

The Farm to Fork Strategy launched by the EU Commission on 20 May 2020 includes an ambitious target on the reduction of the use of veterinary antibiotics. The Commission will take action to reduce overall EU sales of antimicrobials for farmed animals by 50% by 2030.

AVEC welcomes this ambitious target on the reduction of the use of antibiotics. Nevertheless, it is important to acknowledge the efforts that have already been made by our sector. In several EU countries there has already been a significant reduction in the use of antibiotics in the poultry production. The front-runners should not be penalised by their early and successful action, but should instead share their success story and best practices.

1 https://ec.europa.eu/food/system/files/2020-05/f2f_action-plan_2020_strategy-info_en.pdf

Feed additive regulation

Feed additives are part of a sustainable food production system and are highly beneficial for animal welfare. Allowing the use of specific feed additives to achieve optimal nutrition contributes to a healthy poultry gut, and hence to the general welfare of animals. By this means, feed additives have a direct positive impact on the use of antimicrobials, thus contributing to this Farm to Fork Strategy goal. Coccidiostats for example, and other feed additives, contribute to maintaining gut health and will therefore reduce the need for therapeutic antibiotic intervention and protect animal welfare.

Avian Influenza in Europe

In 2021, outbreaks of virus H5N8 subtype were confirmed in poultry and wild birds in different AVEC member states. The first cases were detected in turkey holdings, and later on in layers, broilers, backyard flocks and wild birds, as well as breeder flocks. As a result, trade restrictions were imposed on those countries that had cases.

Until June 2021, there were more than 1,200 cases in poultry in 22 different European countries (monitored by the ADIS system).

The new Regulation (EU) 2020/687, which relates to rules for the prevention and control of certain listed diseases, and is also known as the "Animal Health Law", sets out a different way of handling AI cases, especially with regards to the restocking in surveillance zones. The latter is now more difficult and should be revised to offer more flexibility.

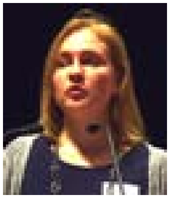
On the one hand, high biosecurity standards and strong surveillance systems are the only way to protect our flocks. On the other hand, we have seen many cases in housed birds and even in breeder flocks.

That is why there is an ongoing discussion on the potential use of vaccination against HPAI. However, this additional tool to protect our flocks can only be used if the question of trade restrictions can be solved.

"AVEC welcomes the ambitious target on the reduction of the use of antibiotics. Nevertheless, it is important to acknowledge the efforts that have already been made by our sector."

AVEC Working group on food safety and food quality

2021 has definitely been the year of rebuilding after the COVID-19 crisis, and therefore a very good example of how resilient our food production systems are, including of course poultry meat production.



Chair, Julie Mayot

Despite COVID-19 and the range of restrictive measures it triggered, our industry has proved its capacity to cope with an extremely difficult situation and maintain its high standards, both regarding food safety and product quality.

Food Safety and Food Quality

The FSFQ working group is now looking forward to the implementation of the Farm to Fork Strategy and all the challenges it contains. Its members have been sharing information on multiple subjects relating to the future European food quality scheme:

- **Nutrition labelling, providing clear, harmonised and reliable information to the consumer.** Multiple private or state systems are already used across the EU, and the role of the working group is to review them and look for the best option.
- **Origin labelling.** AVEC is advocating for mandatory country of origin labelling on all products, with indication of EU/non-EU origin so the consumer is well informed at retail level. The working group believes the same level of transparency should be available when having a meal in a restaurant, at school, or eating a chicken sandwich between two appointments. Such labelling is vital for our sector as a means of illustrating the high standards of EU poultry production, compared with third country imports which do not have to comply with the same demanding legislation.
- **Quality improvement.** This includes initiatives such as the reduction of salt, sugar and fats in processed products. It also relates to the supply of sustainable products in public catering. The working group's task is to establish and then improve on standards for the European sector, and show how sustainable our products are.

The group is also involved in ongoing discussions regarding contaminants, such as salmonella and campylobacter, gathering relevant information and sharing it with as many companies as possible. In the latest zoonosis report that was presented to the working group, salmonella and campylobacter cases were stable. This is good news, but must not deflect us from continued efforts to improve the safety of poultry production in the future.

Marketing standards

The European marketing standards for poultry meat are also of great interest to the members of the FSFQ working group. They have largely proven to be a successful and effective instrument for ensuring the continuity and proper functioning of the common market organisation within the European Union.

In general, industry, trade, controlling authorities and consumers benefit from the application of the marketing standards.

The group is working on maintaining high standards, while adapting these norms to the current practices and demands of the market. EU quality standards are evolving fast, and the COVID-19 situation re-emphasised that we must maintain quality products for everyone in the EU, while satisfying the needs of consumers with a range of demands.

The marketing standards must be adapted to better protect consumers via transparent information on the products being purchased. The standards should also consider technological changes and new production methods, specifically in terms of water-to-protein ratio and labelling.

In particular, the group has led a discussion on the importance of updating the water-to-protein ratio provisions to reflect the current market reality. The revision of the marketing standards should focus on developing a process-controlled methodology, as opposed to the existing end-product result criteria.

Finally, concerning labelling relating to methods of farming, a voluntary scheme offering flexibility to producers would be supported by the sector, and we believe this would serve EU consumers better. To that end, the working group is reviewing existing national schemes and evaluating the importance of various production system criteria.

> "The FSFQ working group is looking forward to the implementation of the farm to fork strategy and all the challenges it contains."

Promotion of agricultural products: This is European Poultry!

"*Enjoy, it's from Europe*" is both the signature of the EU body co-financing the promotion of agricultural products, and the core message of the two-year promotional campaign which involves AVEC and five of its members (BVG, CIDEF, KRD-IG, NEPLUVI and UNAITLIA).

The project has a budget of EUR 5.5m (80% funded by the European Research Executive Agency, European Commission) with the main aim of raising awareness among consumers and professionals of the high standards of poultry meat production in Europe. 2021 is the second year of implementation of the campaign, and despite the challenge of COVID-19, AVEC and its partners have been able to implement a range of activities to promote high EU standards of poultry production.

Sharing the same branding and key messages, each partner is developing a national campaign promoting the quality of EU poultry meat in terms of animal welfare, sustainability, and food safety. Cooking tips and original recipes also play a crucial role in the local campaigns: many of the planned activities involve influencers and chefs who focus on the nutritional benefits of poultry meat and the countless ways it can be prepared.

Under the heading "**This is European poultry! High-quality poultry with European guarantee**", AVEC is targeting professionals and key opinion leaders in Brussels with the main objective of informing them about sustainable production, animal welfare guarantees and food safety.

An event focusing on the reduction of antibiotic usage was held on 21 April 2021 in partnership with the media network Euractiv. It brought together high-level speakers in Brussels with a virtual audience to discuss how the poultry meat sector has been acting to reduce its use of antibiotics.

The campaign is designed to reassure consumers that they can be confident about buying and consuming EU poultry meat - "**Enjoy, it's from Europe!**"

Discover more on our website: www.eu-poultry.eu *(available in 6 languages)!*

AVEC Working group on sustainable production

The Working group on sustainable production was created in 2018 with a focus on both the revision of the BREF for slaughterhouses and policies relating to the environmental impact of poultry production along the whole supply chain. The group includes experts from national associations and companies.

Chair, Christophe Lapasin

Societal demands for the transparency of production systems remains very high, including regarding their environmental impact. The Green Deal and its Farm to Fork Strategy translated these demands into short to medium term objectives.

The contribution of the experts who make up the group has therefore been greatly needed over the past year. Several meetings were held via video-link, each on specific subjects that had been identified as weaknesses for the sustainability of poultry meat production.

Connecting virtually allowed us to achieve wider participation in the meetings, which regularly brought together representatives from Belgium, Denmark, France, Germany, Italy, Latvia, the Netherlands and Slovenia. Additionally, more specialists and experts from the field could be involved and participate in the lively discussions. Even if physical meetings remain essential, we will continue to use technology to meet virtually after the COVID-19 crisis.

The working group has identified the main weaknesses of the sector in terms of environmental impact, and will focus on them to reduce its overall impact:

- use of soybeans in poultry feed that could be linked to deforestation
- management of waste to limit its discharge into nature
- use of plastic for packaging
- emissions in relation to road transport
- integration of more biodiversity into business decision-making.

Addressing these actions forms part of a more general approach to producing a fairer measurement of the environmental impact of poultry production. An EPD (Environmental Product Declaration), which is a methodology applied to an area of activity to assess its environmental impact, has shown that in the case of poultry meat production, methodological assumptions (e.g. on allocations between products and co-products at the slaughterhouse) can influence the final impact values.

These subjects are complex and often require data that is not always available or usable by meat producers (for example, the exact origin of the soya used for feeding the poultry, or the performance of the farm in which livestock manure and similar waste are spread).

Acquisition of new, harmonised and reliable data will be necessary to guarantee more transparency, but will require time and consultation with all stakeholders in order to prevent misuse, leading to either biased information or confusion. This work on transparency will also allow us to capitalise on the strengths of the European poultry meat sector in environmental matters: the high efficiency of conventional production; the low carbon emissions of poultry meat; the possibility to use poultry manure as fertilizer; and the possibility to convert it into biogas.

AVEC Working group on trade

Chair, Stig Munck Larsen

The Working group on trade acts as an advisory expert group under the AVEC board with the objective to:

- support and update the board on trade issues
- take positions and adopt 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

The unfortunate perfect storm in EU´s poultry trade 2020-21

The EU poultry trade was impacted by a number of unfortunate circumstances in 2020 and 2021. A combination of the COVID-19 pandemic at the beginning of 2020, and HPAI outbreaks at the end of the year, had two main negative impacts:

- bans were put in place on EU exports to many third countries not applying regionalisation
- consumption went down as a result of the closure of food service and HORECA sectors, as consumers cooked at home and consumed less per capita.

In 2020 EU exports decreased by 5% to 1,710,000 tons (with a slightly higher overall value). More than 500,000 tons were exported to African countries, which saw the largest export growth rates in first quarter of 2021. This trend has recently been criticised by certain NGOs, claiming that it prevents African countries from developing their own poultry production. AVEC disagrees with this argument, as many African countries are far from self-sufficient and need to import affordable protein for their populations until they have established an efficient and viable production for their home market.

On the other hand, increased exports to Africa could be symptomatic of an imbalance in the global poultry trade, where many markets and destinations for EU exports have suffered bans following restrictive measures after avian influenza outbreaks. It is particularly problematic if countries do not respect international agreements to regionalise in cases of outbreaks of avian influenza and use the measures as an SPS trade barrier.

In this regard it is welcome that members of OIE (the World Organisation for Animal Health) have adopted a revision of the AI Chapter in the Terrestrial Animal Health Code in which the three month import ban in case of high pathogen avian influenza outbreaks has been reduced to 28 days. AVEC hopes that these amendments will remove trade barriers and thereby ensure a more reliable and predictable flow in exports.

Future trade relation with UK
AVEC is closely monitoring the implementation of the Trade and Cooperation Agreement between the EU and the UK. The provisions of this agreement state that UK exports to the EU must comply with all EU requirements laid down for third countries as of 1 January 2021. On the other side, EU exports to the UK must be accompanied by a health certificate as of 1 October 2021, and from 1 January 2022 exports will have to enter the UK through specific border control points, while undergoing physical and documentary checks.

The UK experience so far has been characterised by a lot of challenges, as well as increased costs, mainly due to an increased administrative burden and a lack of resources to handle documents and checks of shipments. There is a significant risk that EU exports to the UK will face the same challenges and costs when the UK fully implements its third country import rules, and a real fear that UK border control agencies will not be ready for the transition.

Defensive trade interest.
The finalisation of the free trade agreement with Mercosur providing for an additional concession of 180,000 tons of poultry meat from Mercosur to the EU is pending final consent by the Parliaments of the EU countries and the European Parliament. At this stage, it is unclear if the full agreement will get sufficient support to be finally adopted, as the trade issues are closely linked with the debate in the EU on sustainable production and deforestation of the Amazon, and the commitment to comply with the Paris climate goals.

AVEC is very concerned about additional poultry meat concessions to Mercosur and has been very vocal on this matter in dealings with all stakeholders. AVEC would welcome a rejection of the new agreement to ensure that the EU poultry sector gets the chance to develop in the future.

AVEC will continue to stress that the EU poultry sector is a sensitive sector and cannot accept new concessions being granted to trading partners such as Ukraine and Thailand in future agreements. These are countries that are already supplying a significant volume of poultry meat to the EU, produced at lower standards compared with the EU.

As to imports of poultry meat in general, the pandemic and the partial closure of food services and HORECA contributed to a 14% drop in imports into the EU in 2020 to 510,000 tonnes. This was mainly driven by a reduction in imports from Thailand and Ukraine. Brazil's exports to the EU were stable.

For AVEC it is essential that poultry meat and meat products comply with EU standards, and that this is monitored by the EU Commission and the member states to ensure food safety and a level playing field in production.

Offensive trade interest.
The EU is one of the largest exporters of poultry meat in the world. It is mainly the dark meat that is exported, as there is less demand for this in the EU and it is the dominant source of animal protein in countries in Africa and Asia.

The EU producers were previously a big exporter of poultry meat to South Africa, with a zero-import duty as part of the EU-SACU Economic Partnership Agreement (EPA).

Nevertheless, safeguard duties, anti-dumping duties and SPS bans have been imposed against EU poultry meat exports in recent years to stop imports into South Africa. Unfortunately, South Africa gets away with these unjustified measures to protect its own market and production, even though imports are needed to meet local demand.

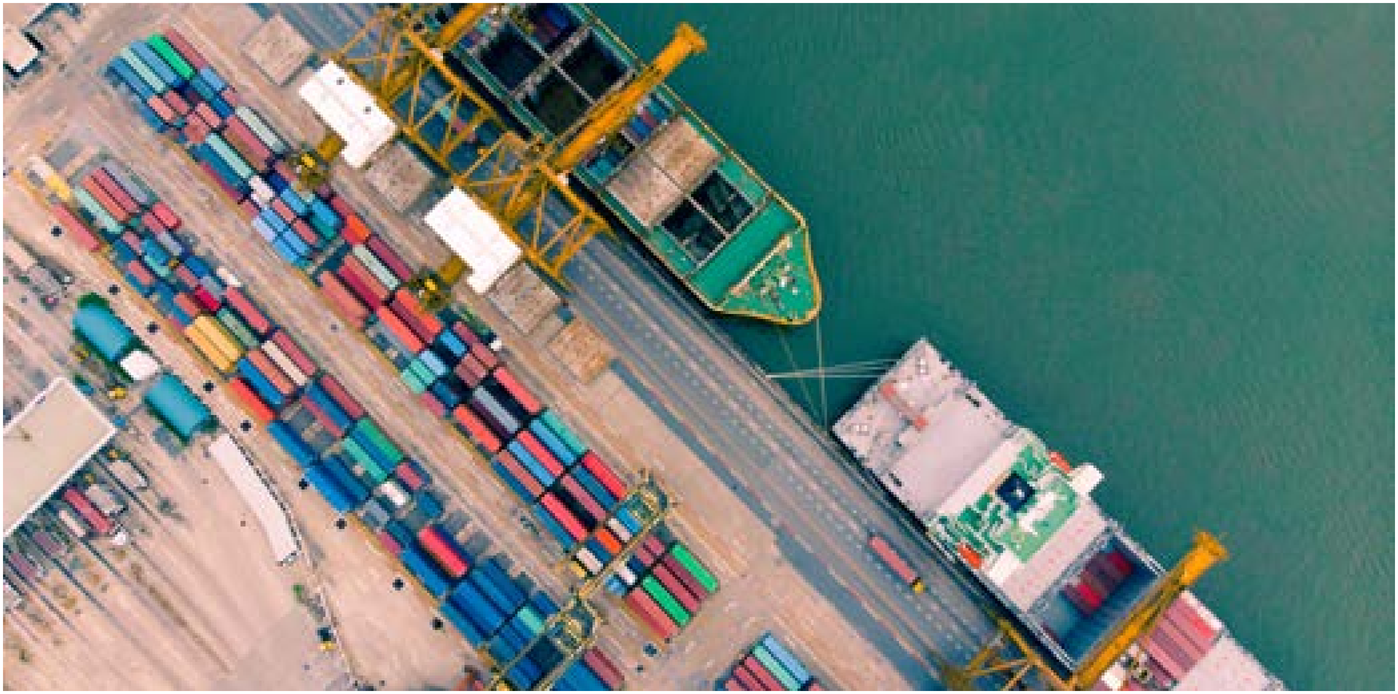
AVEC is very concerned that South Africa is not playing by the rules and that it does not respect the EPA. Despite several attempts to find a solution to the issue, the EU Commission has hesitated for too long in ensuring that the mutually agreed framework for bilateral trade is respected. AVEC has called on the Commission numerous times to actively use EU legislation to address this matter.

The new normal – trade protectionism and self-sufficiency in poultry meat?

Both the COVID-19 pandemic and recent severe global outbreaks of avian influenza will change supply chains and trade in the coming years. Many third countries are now much more focused on imports and plan to revise and increase the level of import requirements linked to health certificates. Despite there being no scientific evidence that imports of food products can transmit COVID-19 to humans, on some continents the pandemic has been used to develop new strategies to increase the level of self-sufficiency in poultry meat for food security reasons.

Increased use of trade instruments or new national restrictive food laws contribute to a risk of reduced trade in certain regions, which will push up the cost of trading and increase global competition in the markets that have not gone down that path.

In the medium term, more pressure is also expected regarding compliance with EU standards (for instance animal welfare) for imported poultry meat. This pressure reflects the demands of food service, HORECA and consumers.



AVEC Working group on turkey

2020 and 2021 have been particularly difficult years for European turkey production and its associated market. There were several challenges during the period.

Chair, Yann Brice

Impact of the COVID-19 pandemic

The first challenge that affected all of us, whatever our sector or trade, was the COVID-19 pandemic. This had a significant impact on the consumption of turkey meat. Because it is mostly consumed in out-of-home catering, the COVID restrictions, with associated closures of restaurants, had immediate consequences. This was seen in a drop in consumption and a tendency towards overproduction and stockpiling (leading to a sharp decline in value).

Even though supermarkets have played a role in promoting and highlighting our products in some member states, the carcass balance has been difficult to maintain. Large stocks of certain cuts have destabilised the prices and the market, particularly in member states less affected by COVID-19.

Consequences of the avian influenza crisis

The second challenge has been the avian influenza crisis. This affected several European countries, with varied but important consequences for the market and turkey production. Although France was mainly affected in its duck production, this was not the case in Germany and Poland, whose turkeys were particularly affected.

Despite the reinforcement of biosecurity measures, several breeding farms and turkey farms have seen their flocks decimated. Depopulation measures to control the spread of the disease were successful, but had a significant impact on production. Millions of animals had to be slaughtered. The consequences for the market have been significant, notably through the closure of export markets. These repeated crises will only serve to encourage us to strengthen our biosecurity measures and adapt our crisis management practices. Eradicating each outbreak as quickly as possible to prevent it from spreading is the best solution for protecting our animals from diseases and regaining a free status as soon as possible.

We need to be proactive about good practices and communication

Finally, the turkey meat sector has been the victim of increasingly vehement and targeted actions of animal welfare organisations. Their lobbying actions are beginning to influence most European policies and we therefore need to be proactive on this issue.

AVEC is addressing this through the update of the turkey management guide of good practices, which aims to harmonise and improve the management of EU turkey production by taking a one health approach, where the health of humans, animals and ecosystems are interconnected.

The previous turkey management guide of good practice, developed collectively within AVEC, established a common European baseline. Since 2012, members of the Turkey working group have updated the guide to better reflect current practices, citizen expectations and consumer demands. We hope it will be validated during the AVEC 2021 Annual General Meeting in Berlin and then widely promoted.

To deal with the declining consumption of turkey meat, we must communicate more effectively and extensively on its benefits if we want to keep it on our plates.

> "EU poultry is committed to producing more with less, improving its performances over the three pillars of sustainability"

Statistics

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

	2016	2017	2018	2019	2019	2020
	EU 28	EU 28	EU 28	EU 28	EU 27	EU 27
Gross indigenous production	14.503	14.564	15.260	15.635	13.478	13.610
Export of meat	1.548	1.532	1.593	1.665	2.487	2.337
Import of meat	882	789	802	850	850	748
Consumption	13.829	13.817	14.462	14.813	11.834	12.016
Consumption per capita, kg	23,8	23,7	24,8	25,3	23,3	23,6
Self-sufficiency,%	104,9	105,5	105,5	105,5	113,9	113,3

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

> "EU poultry sector: a global player with family-based structures"

Production (updated 2020)

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

	2015	2016	2017	2018	2019	2020
Austria	120	125	129	132	134	136
Belgium / Luxembourg	453	462	463	470	417	420
Bulgaria	106	109	107	111	109	109
Croatia	83	81	80	83	85	85
Cyprus	24	20	25	26	27	25
Czech Republic	175	177	183	193	196	197
Denmark	147	156	156	159	169	167
Estonia	20	20	20	19	20	20
Finland	116	121	130	135	140	143
France	1.828	1.830	1.857	1.788	1.790	1.760
Germany	1.807	1.817	1.802	1.818	1.826	1.802
Greece	254	257	246	220	230	235
Hungary	577	620	602	669	688	664
Ireland	125	132	152	160	170	180
Italy	1.321	1.388	1.354	1.314	1.324	1.362
Latvia	30	30	33	33	35	36
Lithuania	111	112	134	108	100	100
Malta	4	4	4	4	4	4
Netherlands	1.057	1.097	1.118	1.119	1.111	1.122
Poland	1.097	2.425	2.511	2.582	2.707	2.648
Portugal	1.118	343	337	342	348	344
Romania	1.119	419	436	480	507	510
Slovakia	1.111	66	71	75	71	71
Slovenia	1.122	67	68	69	71	75
Spain	1.453	1.526	1.454	1.427	1.392	1.390
Sweden	145	156	157	155	160	165
EU 27	**12.978**	**13.560**	**13.628**	**13.690**	**13.830**	**13.769**
United Kingdom	1.663	1.739	1.812	1.937	1.937	.
EU 28	**14.641**	**15.299**	**15.440**	**15.627**	**15.767**	**.**

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 European Commission, national data, FAO and Eurostat

Production (updated 2020)

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

	2015	2016	2017	2018	2019	2020
Argentina	2.093	2.055	2.116	2.130	2.193	2.203
Brazil	13.874	13.891	14.003	13.634	13.661	14.076
Chile	700	727	711	765	792	815
China	18.051	17.149	16.634	16.800	18.800	19.500
India	2.889	3.111	3.544	3.707	3.743	3.962
Japan	1.517	1.545	1.575	1.599	1.633	1.631
Mexico	2.995	3.110	3.243	3.324	3.429	3.484
Russia	4.541	4.622	4.941	4.980	5.040	5.085
Saudi Arabia	617	630	621	732	753	777
Switzerland	87	91	95	102	103	108
South Africa	1.745	1.694	1.678	1.764	1.748	1.762
Turkey	2.031	1.983	2.258	2.305	2.383	2.429
Ukraine	1.032	1.067	981	1.022	1.129	1.195
USA	20.527	20.975	21.409	21.783	22.225	22.705
World Production	**116.631**	**119.692**	**121.79**	**124.754**	**129.393**	**132.067**

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

> "AVEC is an active stakeholder in the discussions on the Farm to Fork Strategy, and we underline that all legislation must be based on clear science."

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

	2015	2016	2017	2018	2019	2020	2020 from third countries – EU 27
Poultry Meat [1)]							
Austria	102	114	105	103	108	96	1
Belgium / Luxembourg	252	268	288	286	298	269	29
Bulgaria	103	102	111	110	112	100	2
Croatia	20	21	19	21	22	18	0
Cyprus	10	11	11	12	12	10	0
Czech Republic	114	119	109	115	110	113	1
Denmark	66	58	65	73	77	71	5
Estonia	18	21	19	27	22	21	0
Finland	9	9	10	9	8	8	0
France	420	437	442	457	458	432	22
Germany	614	672	694	721	721	652	36
Greece	72	79	80	82	84	72	1
Hungary	36	40	54	54	68	77	16
Ireland	104	90	82	88	77	62	22
Italy	66	59	68	69	67	67	2
Latvia	28	34	40	43	44	39	1
Lithuania	37	35	39	39	42	47	0
Malta	6	6	6	6	6	6	0
Netherlands	396	503	491	573	588	567	192
Poland	36	47	59	79	89	60	26
Portugal	64	67	68	74	73	66	12
Romania	124	137	143	137	122	134	11
Slovakia	48	53	57	83	102	88	0
Slovenia	17	18	18	20	20	18	0
Spain	155	163	182	169	151	138	33
Sweden	52	55	58	55	58	53	1
United Kingdom	409	435	429	445	434	.	.
EU 28 from third countries	**155**	**157**	**161**	**234**	**215**	**.**	**.**
EU 27 from third countries	**.**	**.**	**.**	**.**	**469**	**391**	**391**
Salted meat [2)]							
Germany	47	50	39	28	30	31	19
Netherlands	170	176	141	121	154	134	130
United Kingdom	59	60	45	36	45	.	.
EU 28 from third countries	**265**	**277**	**211**	**176**	**204**	**.**	**.**
EU 27 from third countries	**.**	**.**	**.**	**.**	**177**	**157**	**157**
Preparations of poultry [3)]							
EU 28 from third countries	**387**	**401**	**389**	**338**	**338**	**.**	**.**
EU 27 from third countries	**.**	**.**	**.**	**.**	**178**	**153**	**153**

Notes: 1. Without preparations, livers, salted meat and live poultry. - 2019 partly preliminary. - Data in the EUROSTAT trade statistics and trade balance are partial different. 2. tariff 0210 99 39, almost exclusively poultry. 3. tariff items 1602 31 .. 1602 32 .. and 1602 39 ...
Source: MEG to Eurostat and national statistics.

Trade

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

	2015	2016	2017	2018	2019	2020	2020 to third countries – EU 27
Austria	58	57	61	63	65	67	10
Belgium / Luxembourg	538	576	578	572	511	517	181
Bulgaria	39	41	44	46	43	32	4
Croatia	7	8	8	9	8	8	5
Cyprus	0	1	1	1	1	1	1
Czech Republic	35	37	24	23	18	16	1
Denmark	67	74	86	83	88	82	36
Estonia	6	7	7	7	9	9	1
Finland	17	16	13	14	14	14	3
France	477	433	425	402	362	325	168
Germany	507	494	482	451	475	405	65
Greece	21	21	29	33	35	33	13
Hungary	202	229	183	213	235	204	51
Ireland	69	74	90	87	107	91	78
Italy	154	177	165	158	167	161	62
Latvia	11	13	18	17	16	15	3
Lithuania	49	47	55	51	46	47	12
Malta	0	1	0	0	0	0	0
Netherlands	1.150	1.382	1.437	1.495	1.583	1.445	632
Poland	841	1.025	1.156	1.325	1.461	1.439	558
Portugal	25	27	42	34	27	24	12
Romania	66	57	59	66	75	75	19
Slovakia	33	30	21	37	37	22	1
Slovenia	17	20	22	23	23	21	8
Spain	198	230	216	245	241	212	95
Sweden	65	76	74	76	84	84	11
United Kingdom	299	296	335	361	383	.	.
EU 28 to third countries	**1.332**	**1.506**	**1.483**	**1.578**	**1.686**	**.**	**.**
which were							
Chicken	1.172	1.323	1.317	1.419	1.525	.	.
Turkey	129	151	140	127	133	.	.
EU 27 to third countries	**.**	**.**	**.**	**.**	**2.167**	**2.021**	**2.021**
Preparations of poultry [3)]							
EU 27 to third countries	**.**	**.**	**.**	**.**	**245**	**244**	**244**
EU 28 to third countries	**38**	**39**	**41**	**44**	**54**	**.**	**.**

Notes: 1. Without preparations, livers, salted meat. 2. 2019 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

	2015	2016	2017	2018	2019	2020
Total imports of poultry meat						
Switzerland	47	46	45	45	46	43
Imports of broiler meat						
Angola	221	205	267	317	266	210
China	268	430	311	342	580	1.000
Hong Kong [1)]	312	344	390	.	.	.
Iraq	625	563	444	527	493	480
Japan	936	973	1.056	1.074	1.076	1.015
Russian Federation	250	220	225	225	224	200
Saudi Arabia	863	878	711	629	600	550
United Arab. Emirates	277	422	439	579	625	.
Exports of broiler meat						
Argentina	187	158	178	125	155	155
Belarus	135	145	150	168	172	.
Brazil	3841	3889	3835	3675	3811	3760
Chile	99	.	.	.	.	.
China	401	386	436	447	428	400
Thailand	622	690	757	826	881	855
Turkey	292	263	357	418	408	456
Ukraine	158	236	263	317	409	428
USA	2.932	3.086	3.137	3.244	3.259	3.391

Notes: 1. Without preparations, livers, salted meat.
Sources: MEG to USDA and national data.

> "One of our key principles is supporting and enabling growth and job potential in rural areas around Europe"

Consumption

7. Per capita consumption of poultry meat in the EU and third countries (kg/head)

	2015	2016	2017	2018	2019	2020
Austria	21,0	21,2	20,8	21,0	20,9	20,9
Czech Republic	23,0	23,2	23,5	24,0	25,0	24,8
Denmark	24,7	24,5	23,1	24,0	25,0	24,2
Finland	19,6	20,7	23,1	24,2	24,6	24,7
France	27,1	26,5	27,6	29,5	28,3	28,4
Germany	20,1	20,8	20,8	22,2	22,0	22,3
Greece	20,9	20,0	18,9	19,0	20,0	20,0
Hungary	30,8	31,1	32,0	32,5	32,9	33,0
Ireland	31,7	35,2	34,0	35,0	33,0	33,3
Italy	19,7	20,3	20,7	20,5	20,3	21,3
Latvia	22,0	23,0	22,5	.	23,5	24,0
Lithuania	22,9	23,5	24,0	24,5	26,0	24,0
Netherlands	22,1	22,2	22,1	22,5	22,9	23,0
Poland	27,1	29,2	27,6	29,6	28,3	28,0
Portugal	36,2	37,0	35,1	37,0	35,0	34,5
Slovakia	9,9	20,1	21,0	20,5	22,0	21,5
Spain	31,0	31,4	30,5	31,3	30,0	30,1
Sweden	20,8	21,9	22,0	21,9	22,0	.
EU 28	**22,9**	**23,8**	**23,7**	**24,8**	**25,3**	**.**
EU 27	**.**	**.**	**.**	**.**	**23,3**	**23,6**
Switzerland	19,0	18,9	17,8	18,4	18,4	18,4
United Kingdom	27,3	28,7	28,9	29,7	29,8	.

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

Consumption

8. Self-sufficiency in poultry meat (%)

	2015	2016	2017	2018	2019	2020
Austria	66	68	70	71	72	73
Czech Republic	69	69	68	67	68	67
Finland	99	97	95	98	96	98
France	104	104	99	96	89	88
Germany	110	106	105	99	100	97
Greece	79	75	75	76	80	82
Hungary	143	140	127	130	132	128
Ireland	95	89	93	91	95	96
Italy	107	109	108	107	108	107
Latvia	65	64	70	.	62	61
Lithuania	112	112	115	111	103	101
Netherlands	185	188	186	180	161	.
Poland	211	219	240	245	243	250
Slovakia	75	73	70	.	.	.
Spain	103	105	102	105	107	106
Sweden	99	103	105	115	116	.
EU 27	**.**	**.**	**.**	**.**	**114**	**113**
United Kingdom	94	93	95	96	97	.
EU 28	**104**	**105**	**105**	**106**	**106**	**.**

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

Broiler

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

	2015	2016	2017	2018	2019	2020
Austria	102	107	110	114	117	118
Belgium / Luxembourg	445	453	455	462	440	450
Bulgaria	85	86	87	87	89	90
Cyprus	23	24	25	25	27	25
Czech Republic	160	159	165	170	174	175
Denmark	146	155	154	157	167	165
Estonia	20	20	20	19	20	21
Finland	108	113	122	127	132	135
France	1.139	1.133	1.163	1.185	1.187	1.176
Germany	1.285	1.290	1.300	1.345	1.340	1.330
Greece	173	156	151	185	185	185
Hungary	365	394	409	414	436	454
Ireland	110	160	180	190	205	206
Italy	929	981	1.034	1.001	1.015	1.030
Croatia	69	67	67	69	70	70
Latvia	30	30	33	33	35	36
Lithuania	105	105	126	103	97	100
Malta	4	4	4	4	4	4
Netherlands	986	1.036	1.034	1.038	1.036	1.047
Poland	1.699	.	2.055	2.115	2.207	2.180
Portugal	271	278	287	289	294	289
Romania	350	360	388	415	415	420
Slovakia	70	57	80	80	80	80
Slovenia	54	62	63	64	65	69
Spain	1.203	1.268	1.250	1.191	1.151	1.147
Sweden	113	136	148	150	154	159
EU 27	**10.043**	**10.511**	**10.909**	**11.032**	**11.142**	**11.160**
United Kingdom	1.456	1.535	1.630	1.75	1.749	.
EU 28	**11.500**	**12.047**	**12.539**	**12.782**	**12.892**	**.**
Argentina	2.085	2.119	2.150	2.068	2.171	2.190
Brazil	13.547	13.523	13.612	13.555	13.690	13.880
China	13.561	12.448	11.600	11.700	13.750	14.600
India	4.115	3.464	3.767	4.062	4.188	.
Indonesia	2.031	2.301	3.176	3.410	3.495	3.495
Iran	2.061	2.142	2.182	2.231	2.280	.
Mexico	3.175	3.275	3.400	3.485	3.600	3.725
Russia	4.222	4.328	4.680	4.684	4.671	.
South-Africa	1.497	1.500	1.335	1.407	1.395	1.510
Thailand	2.692	2.813	2.990	3.170	3.300	3.250
USA	18.208	18.51	18.938	19.361	19.941	20.239
World	**103.777**	**106.737**	**110.857**	**115.013**	**118.017**	**120.000**

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

Broiler

10. Per capita consumption of broiler in selected EU and third countries (kg/head)

	2015	2016	2017	2018	2019	2020
Austria	14,2	14,6	14,5	14,9	15,0	15,2
France	17,2	18,0	19,0	19,5	20,1	.
Germany	12,4	12,9	13,3	14,3	14,4	14,8
Italy	12,5	12,5	.	.	.	.
Netherlands	20,3	20,2	20,4	.	.	.
Portugal	.	.	.	.	.	.
EU 28	**18,5**	**19,2**	**19,2**	**20,2**	**20,8**	**.**
United Kingdom	22,9	23,2	.	.	.	.
EU 27	**.**	**.**	**.**	**.**	**19,1**	**19,4**
Third countries						
Argentina	43,7	44,9	44,7	46,3	.	.
Brazil	47,1	46,4	47,0	46,2	46,8	47,6
China	9,5	8,8	8,1	8,1	9,7	10,6
India	3,1	2,6	2,8	3,0	3,2	.
Japan	19,6	20,2	21,1	21,7	22,0	22,2
Mexico	32,5	32,9	33,6	34,1	35,0	35,3
South Africa	32,0	32,1	31,4	32,5	31,2	32,0
USA	47,7	48,1	48,7	49,5	50,8	51,2

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

> “We always look for ways to reduce our carbon footprint and reduce wastage, and have the constant goal of producing more with less”

Turkey

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

	2015	2016	2017	2018	2019	2020
Austria	17	18	18	18	16	17
Belgium / Luxembourg	8	8	8	7	8	8
Bulgaria	1	0	0	0	0	0
Croatia	13	13	12	14	14	14
Cyprus	0	0	0	0	0	0
Czech Republic	6	9	7	10	10	10
Denmark	1	1	1	1	1	1
Finland	8	8	8	8	8	8
France	355	382	369	338	339	327
Germany	396	407	387	360	388	392
Greece	3	3	3	3	3	3
Hungary	97	101	97	98	96	98
Ireland	26	26	25	27	29	31
Italy	313	331	309	301	301	325
Malta	0	0	0	0	0	0
Netherlands	28	28	28	28	.	.
Poland	312	.	376	384	408	380
Portugal	38	38	40	42	44	45
Romania	12	10	10	14	15	15
Slovakia	0	1	1	1	1	1
Slovenia	5	5	5	5	6	6
Spain	171	187	200	233	236	238
Sweden	4	4	5	5	5	5
EU 27	**1.812**	**1.914**	**1.907**	**1.895**	**1.955**	**1.951**
United Kingdom	181	166	147	157	148	150
EU 28	**1.993**	**2.080**	**2.054**	**2.052**	**2.103**	**.**
Brazil	480	576	575	594	613	.
Canada	172	183	171	169	165	.
Mexico	19	17	16	17	17	17
Russia	.	.	.	.	.	.
South Africa	596	596	596	596	596	596
USA	.	.	.	.	.	.
World	**5.657**	**6.046**	**5.889**	**6.032**	**5.992**	**5.890**

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

Turkey

12. Per capita consumption of turkey in selected EU- and third countries (kg/head)

	2015	2016	2017	2018	2019	2020
Austria	5,2	5,1	4,8	4,7	4,0	4,4
France	4,6	4,8	4,7	4,4	4,4	4,5
Germany	5,9	6,0	5,7	5,9	5,8	5,8
Italy	4,9	.	.	.	.	.
Netherlands	1,1	.	.	.	.	.
Portugal	.	.	.	.	.	.
United Kingdom	.	.	.	.	.	.
EU 28	**3,9**	**4,1**	**4,0**	**4,0**	**4,1**	**.**
EU 27	**.**	**.**	**.**	**.**	**.**	**4,1**
USA	7,3	7,5	7,4	7,3	7,3	7,1

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

“We believe our first responsibility is to consumers. We are passionate about providing wholesome and nutritious European poultry meat to consumers around the world.”

Duck

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

	2015	2016	2017	2018	2019	2020
Austria	0,1	0,1	0,1	0,4	0,5	0,5
Belgium / Luxembourg	0,1	0,1	0,1	0,1	0,1	0,1
Bulgaria	20,3	22,5	19,6	23,1	19,8	19,0
Cyprus	0,0	0,0	0,0	0,0	0,0	0,0
Czech Republic	8	9	11	12	110	11
Denmark	4,0	1,0	1,8	1,2	1,5	1,5
Estonia	.	.	.	.	.	.
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	231,6	206,2	203,6	227,3	226,3	220,7
Germany	50,3	48,5	40,5	41,4	41,3	25,9
Greece	0,1	0,1	0,1	0,1	0,1	0,1
Hungary	84	80	68	123	118	89
Ireland	5,1	5,2	5,8	5,8	4,5	5,0
Italy	9,0	6,9	5,5	6,0	4,0	4,0
Latvia	.	.	.	.	.	.
Lithuania	0	0	0	0	0	0
Malta	.	.	.	.	.	.
Netherlands	16,0	16,0	18,0	19,0	.	.
Poland	45	59	48	45	52	53
Portugal	9,9	10,0	10,1	10,6	10,6	10,0
Romania	.	.	.	.	.	.
Slovakia	0	0	0	0	1	1
Slovenia	.	.	.	.	.	.
Spain	2,0	4,1	3,7	3,2	4,6	4,5
Sweden	0,0	0,0	0,0	0,0	0,0	0,0
EU 27	**523,0**	**510,0**	**475,0**	**555,0**	**550,0**	**500,0**
United Kingdom	29,2	30,0	30,6	30,4	29,9	.
EU 28	**552,2**	**540,0**	**505,6**	**585,4**	**579,9**	**.**
World	**4.305,7**	**4.402,9**	**4.361,4**	**4.801,0**	**4.858,1**	**.**

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. a) Poultry meat market projections for the EU, 2012–2030 (‘000 tonnes carcass weight equivalent)

	2016	2017	2018	2019	2020	2021	2022	2023
Gross indigenous production	12703	12746	13295	13471	13605	13696	13726	13766
Consumption	11409	11354	11804	11834	12000	12103	12167	12201
per capita consumption (kg r.w.e.)*	22.6	22.4	23.3	23.3	23.6	23.8	23.9	23.9
Imports (meat)	914	849	836	850	748	810	829	843
Exports (meat)	2 208	2 241	2 326	2 487	2 337	2 349	2 381	2 417
EU market price in EUR/t	1 857	1 895	1 922	1 907	1 881	1 843	1 864	1 905
World market price in EUR/t	1 384	1 463	1 314	1 448	1 321	1 310	1 322	1 350

	2024	2025	2026	2027	2028	2029	2030
Gross indigenous production	13806	13846	13883	13925	13972	14022	14076
Consumption	12249	12294	12332	12352	12365	12416	12454
per capita consumption (kg r.w.e.)*	24.1	24.2	24.3	24.3	24.4	24.5	24.6
Imports (meat)	861	880	897	914	928	944	960
Exports (meat)	2 431	2 445	2 472	2 503	2 533	2 553	2 566
EU market price in EUR/t	1 942	1 986	2 013	2 024	2 034	2 048	2 063
World market price in EUR/t	1 388	1 417	1 434	1 440	1 446	1 454	1 463

*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 2016-2030, The European Commission, DG AGRI, December 2020 (https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2020-report_en.pdf)

Projections

15. b) Aggregate meat market projections for the EU, 2016–2030 ('000 tonnes carcass weight equivalent)

	2016	2017	2018	2019	2020	2021	2022	2023
Gross indigenous Production	43476	43367	44442	44369	44242	44006	43933	43910
Consumption	38218	38140	39093	38298	38086	38302	38315	38204
per capita consumption (kg r.w.e.)*	68.5	68.2	69.9	68.4	68	68.4	68.3	68.2
of which beef and veal meat	11	10	11	11	10	10	10	10
of which sheep and goat meat	1	1	1	1	1	1	1	1
of which pig meat	34	34	34	33	33	33	33	33
of which poultry meat	23	22	23	23	24	24	24	24
Imports (meat)	1 587	1 520	1 546	1 561	1 400	1 472	1 500	1 510
Exports (meat)	6 529	6 406	6 551	7 295	7 238	6 823	6 821	6 949
Net trade (meat)	4942	4886	5005	5734	5838	5351	5321	5439

	2024	2025	2026	2027	2028	2029	2030
Gross indigenous Production	43831	43745	43653	43558	43472	43384	43311
Consumption	38058	37949	37880	37781	37706	37650	37568
per capita consumption (kg r.w.e.)*	68	67.9	67.8	67.7	67.7	67.7	67.6
of which beef and veal meat	10	10	10	10	10	10	10
of which sheep and goat meat	1	1	1	1	1	1	1
of which pig meat	33	32	32	32	32	32	32
of which poultry meat	24	24	24	24	24	25	25
Imports (meat)	1 532	1 561	1 585	1 609	1 629	1 649	1 670
Exports (meat)	7 048	7 109	7 130	7 148	7 159	7 160	7 166
Net trade (meat)	5516	5548	5545	5539	5530	5511	5496

* 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 2016-2030, The European Commission, DG AGRI, December 2020 https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2020-report_en.pdf)

EU27 poultry meat import trade, main tariff lines, 2010, 2015, 2019, 2020

IMPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2019	2020	2019	2020
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	3.812.126	3.770.659	4.687.994	3.906.973	138,65	126,95
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens'	98.376	86.896	109.673	132.675	133,60	119,90
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus Domesticus	213.510	200.975	288.870	274.523	234,14	190,14
02071340	Fresh or chilled backs, necks, backs with necks attached, rumps and wing-tips of fowls of the species Gallus domesticus	245.000	633.407	772.677	604.234	17,53	23,32
02071350	Fresh or chilled breasts and cuts thereof of fowls of the species Gallus domesticus, with bone in	98.891	91.298	83.236	367.813	255,10	165,00
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)	65.627	93.368	776.160	126.683	139,53	194,24
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.025.470	994.569	990.362	818.506	237,69	200,71
02071460	Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in	298.820	321.201	332.798	288.18	102,32	108,85
02072710	Frozen boneless cuts of turkeys of the species domesticus	179.093	134.244	142.142	135.656	368,05	376,73
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**	1.641.916	2.176.183	1.769.982	1.570.349	222,34	186,78
1602 (poultry)	**PREPARED/PRESERVED MEAT**	2.933.317	2.836.058	1.783.222	1.545.630	360,81	362,43
160231	**TURKEYS**	810.247	475.735	35.903	33.419	429,71	522,80
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	778.901	439.803	23.180	19.026	324,97	400,79
160232	**GALLUS DOMESTICUS**	1.990.264	2.208.354	1.582.830	1.385.855	352,39	349,88
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	141.025	140.180	55.466	53.522	297,61	267,39
16023219	Cooked. prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	1.196.298	1.433.684	1.327.711	1.089.198	357,98	360,31
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.)	638.456	595.093	153.953	197.033	330,47	325,82
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.)	14.485	39.397	45.700	46.103	330,41	302,07
160239	**OTHER**	121.871	146.855	160.432	121.951	426,48	455,61
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	110.382	124.782	144.627	107.474	434,96	463,63

Source: Extraction Eurostat, July 2021

EU27 poultry meat export trade, main tariff lines, 2010, 2015, 2019, 2020

EXPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2019	2020	2019	2020
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	14.297.564	17.533.139	21.671.173	20.205.763	138,31	132,92
02071190	Fresh or chilled, plucked and drawn fowls of species Gallus domesticus, without heads, feet, necks, hearts, livers and gizzards, known as "65% chickens", and other forms of fresh or chilled fowl, not cut in pieces (excl. "83% and 70% chickens")	356.981	582.335	722.907	593.068	142,07	156,12
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens',	2.936.135	2.850.225	2.148.574	2.245.868	122,17	116,01
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus domesticus	1.031.595	1.186.344	1.986.081	1.905.611	345,17	333,15
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.696.583	2.721.788	4.808.221	4.131.651	90,47	88,60
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	1.067.747	1.612.613	1.929.616	1.738.311	99,45	94,24
02071430	Frozen whole wings, with or without tips of Gallus domesticus	831.325	1.527.185	1.987.032	1.935.008	121,10	123,94
02071460	Frozen legs and cuts thereof of fowls of the species gallus	496.374	1.024.605	1.206.636	1.033.137	94,13	92,31
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	598.871	811.913	762.654	759.713	106,49	92,20
02072710	Frozen boneless cuts of turkeys of the species domesticus	343.083	270.54	312.973	249.433	190,76	184,57
02072730	Frozen whole wings, with or without tips, of turkeys	230.471	384.839	303.188	368.571	130,29	113,69
0207 other		3.708.399	4.560.752	5.503.291	5.245.392	142,66	128,64
1602 (poultry)	**PREPARED/PRESERVED MEAT**	1.946.648	2.195.549	2.579.458	2.577.425	362,99	353,10
16023119	Meat or offal of turkeys "poultry", prepared or preserved, containing- >= 57% by weight of meat or offal of poultry	59.362	92.076	100.208	91.688	400,65	413,47
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry (excl. sausages and similar products, and preparations of liver)	357.577	407.800	419.055	560.382	371,40	355,03
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	635.049	764.874	1.011.770	998.244	375,76	359,84
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.)	181.334	233.388	542.928	520.471	324,04	304,89
1602 other		713.326	697.411	505.497	406.640	364,82	381,99

Source: Extraction Eurostat, July 2021

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