



# Annual report



2022



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

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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

## President and secretariat



President  
**Paul Lopez, FIA**  
(France)



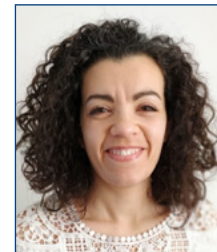
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**Acknowledgements:** AVEC would like to thank the chairs of its working groups, BVG, CIDEF, HKScan and UNAITALIA for their contribution to this annual report

# Introduction

2020 and 2021 were difficult years due to the COVID-19 pandemic ... but 2022 has proved to be the most challenging year of the millennium so far. The Ukraine crisis has directly affected global energy, fertiliser and feed commodity prices. Feed and energy prices are sky-high, and no one knows how the prices will develop in the future. The consequences of COVID-19 are still causing challenges, and at the same time the poultry sector is facing one of the worst avian influenza seasons in history.

In recent years we have been faced with an avian influenza situation that varies annually. We must accept that our high biosecurity standards and strong surveillance systems are not sufficient to protect our flocks. Therefore, AVEC is engaged in ongoing discussions 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 has been addressed.

To remove trade barriers and ensure a more reliable and predictable flow of exports, it is vital that all members of the World Organisation for Animal Health (WOAH, formerly OIE) respect the new rules of the avian influenza chapter in the Terrestrial Animal Health Code, in which the three-month import ban in cases of high-pathogen avian influenza outbreaks has been reduced to 28 days.

Animal welfare is a hot topic in many EU member states, and EU legislation on animal welfare will be revised in 2023. AVEC agrees that the existing animal welfare requirements should be reviewed to ensure they are aligned with the latest scientific data. But there needs to be a much greater acknowledgement of the progress already made at European level when policy makers revise the rules. AVEC has a seat on the EU Platform on Animal Welfare – a forum established to promote an enhanced dialogue on animal welfare issues that are relevant at EU-level, which brings

together competent authorities, businesses, civil society and scientists. At the Platform's meetings, AVEC always makes the point that when citizens are asked if they want the livestock animals of Europe to have higher animal welfare standards they say yes, but when the same people go to the supermarket to buy their food, they do not buy the more expensive products with associated higher animal welfare. Instead they buy the cheaper conventional product. And this has become even more apparent after the COVID-19 crisis, and now also the Ukraine crisis, where inflation has put significant economic pressure on a lot of EU households. European poultry meat producers are ready to produce products with higher animal welfare standards providing there is a market to sell these products, and right now it is difficult to see such a market developing.

Societal demands for the transparency of production systems remain very high, including regarding their environmental impact. These subjects are complex and often require data that is not always available or usable by meat producers. Acquisition of new, harmonised and reliable data will be necessary to guarantee more transparency, but developing this will require time and consultation with all stakeholders in order to prevent misuse, leading to biased or misleading information. Making this investment in transparency will also allow the European poultry meat sector to demonstrate its strengths in environmental matters: the high efficiency of conventional production; the low carbon emissions of poultry meat; the role of poultry manure as a fertiliser; and the possibility to convert it into biogas.

There is currently a knowledge gap between what the livestock sector in Europe is doing and what stakeholders and consumers in general believe it is doing. At a political level, there is also a lack of understanding of the economic realities faced by primary producers in a highly pressurised value chain.

Today's livestock farms are very different from how they used to be. They have embraced innovation to improve efficiency and use fewer resources. But few people are aware of this evolution because in recent decades the number of farms across our continent has declined dramatically. Many consumers have never experienced agriculture or livestock close-up and often have a romantic vision of animal farming. The result is that we often talk about agriculture and animal husbandry from an urban perspective that is far removed from the reality of livestock production and its natural cycles.

To help address these misconceptions, AVEC is one of the founding members of European Livestock Voice, a multi-stakeholder group of like-minded EU partners in the livestock food chain. Its members have united to promote a balanced debate around a sector that plays such an essential role in Europe's

rich heritage and future. The member associations – which represent sectors ranging from animal health to feed, breeding, farming and farmers – work to inform the public about the societal value of livestock production and its positive contribution to global challenges, offering another perspective in the debate.

By working together, we have greater visibility and our message can reach a wider audience. This is extremely important at a time where the future of food production is being heavily debated within the framework of the Farm to Fork Strategy.

**Paul Lopez**

**Birthe Steenberg**



# Contents

Our association .....	5
Our members .....	6
Board members, 2020–2021.....	9
EU and international key partners .....	10
AVEC’s focuses 2021–2022.....	11
AVEC Working group on animal health and animal welfare.....	12
AVEC Working group on food safety and food quality.....	14
AVEC Working group on sustainable production.....	16
AVEC Working group on trade .....	18
EU Promotional campaigns.....	21
AVEC Working group on turkey .....	22
Statistics.....	24
Production (updated 2021) .....	25
Trade .....	27
Consumption .....	30
Broiler .....	32
Turkey .....	34
Duck.....	36
Projections.....	37
EU27 poultry meat import trade, main tariff lines, 2010, 2015, 2020, 2021.....	39



“

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

”

# 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 poultry 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, with four employees:

- Secretary General, Birthe Steenberg
- Senior Policy Advisor, Paul-Henri Lava
- Policy Adviser, Nadia Khaldoune
- Project Manager, Federica Chiarella

## 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.

Following COVID-19, the working groups meet remotely. Further ad hoc working groups may be convened for pressing issues. Examples in 2021/22 included responding to marketing standards and the revision of the BREF for slaughterhouses.

There are five permanent working groups covering the following key areas:



**Animal health and welfare**



**Food safety and food quality**



**Sustainability**



**Trade/promotion**

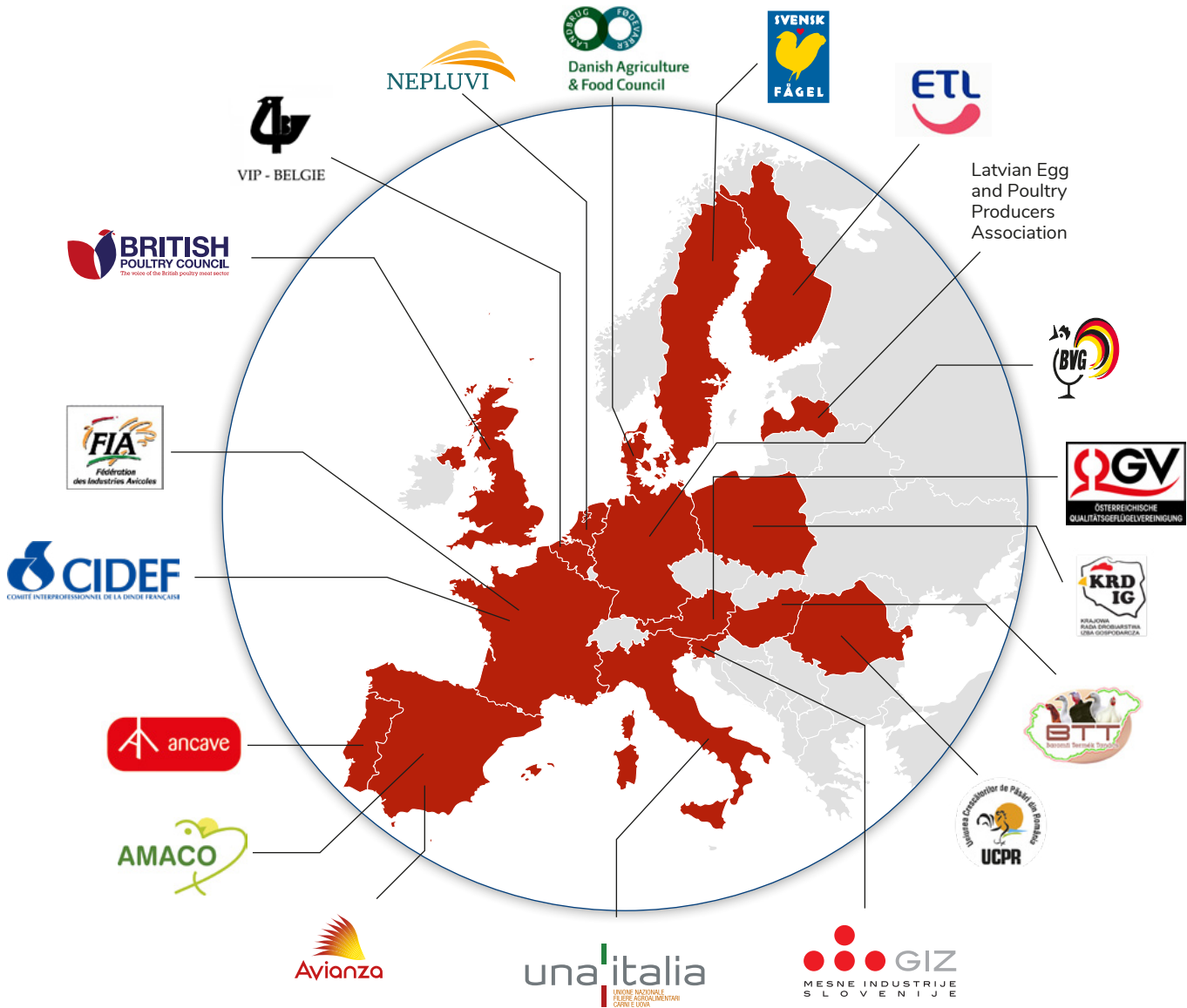


**Communication**



# 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.





# Our members

## AUSTRIA

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Danish Agriculture & Food Council

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# Board members, 2021–2022

Country	Board Member	Deputy Board Member
AUSTRIA	Harald Schliessnig	Stefan Weber
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 Eriha	Saulius Petkevičius
NETHERLANDS	Gert Jan Oplaat	Mark Den Hartog
POLAND	Dariusz Goszczyński	Zbigniew Idziaszek
PORTUGAL	Avelino Gaspar	Dinis dos Santos
ROMANIA	Ilie Van	Ovidiu Oprita
SLOVENIA	Enver Šišič	Janez Rebec
SPAIN	Antonio Sánchez	Jordi Montfort
SWEDEN	Maria Donis	Mats Hedlund
UNITED KINGDOM	Philip Wilkinson	Richard Griffiths

“ Around 370,000 people in the European Union currently earn their living directly from the poultry meat sector. ”

# EU and international key partners

AVEC cooperates with a wide range of 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.

## European Livestock Voice (ELV)

AVEC is a part of European Livestock Voice (ELV) – 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, breeding, farming and farmers, work to inform the public about the societal value of livestock production and its contribution to global challenges, offering another perspective in the ongoing debates. European Livestock Voice has created a website ([meatthefacts.eu](http://meatthefacts.eu)) with factual information about production practices and key information on the livestock sector in Europe. The objective is not



to tell consumers what to eat, but to enable them to make informed decisions about their choices.

ELV also produces content including press articles, social media posts and opinion pieces, as well as interviews on topics such as carbon farming, animal welfare, the Farm to Fork Strategy and synthetic meat. Andrea Bertaglio, an Italian journalist, was hired in 2022 to develop content and coordinate the work of the ELV.



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 Codex Alimentarius, FAO, WHO, WOAH (formerly OIE) and WTO.



# AVEC's focuses 2021–2022

This section provides an overview of the main themes AVEC has worked on during 2021–2022. 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](http://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.

### Animal welfare

During 2020 and 2021, AVEC participated in meetings relating to topics including poultry welfare, stunning methods, transport and labelling. At these meetings experts from AVEC and ELPHA presented poultry production practices from a scientific angle. AVEC has a strong commitment to high standards of animal welfare, but we see room for improvement when it comes to controlling welfare rules in third countries.

### Antimicrobial resistance (AMR) and the use of veterinary antibiotics

During the first semester of 2022, the European Commission adopted several delegated acts and proposed a list of antibiotics and antimicrobials that are reserved for human use only. This list, which was discussed intensively by AVEC and supported by the association, was based on scientific evaluations from the European Medicines Agency (EMA) which, for example, recommended keeping colistin within the list of substances authorised for animal use.

It is of utmost importance that we keep fighting for the right to treat animals with appropriate antibiotics and antimicrobials in the future. A This is simply necessary to ensure animal welfare. AVEC believes antimicrobials should be used as little as possible but as much as necessary.

Scientific studies and data collection and monitoring such as The European Union Summary Report on Antimicrobial Resistance in zoonotic and indicator bacteria from humans, animals and food in 2019–2020, published by EFSA in March 2022, are



Chair, Harald Schliessnig

key to developing strong action plans against AMR at national and European levels.

### Animal Health Law

AVEC and ELPHA created a joint list of concerns relating to the implementation of the new Animal Health Law (AHL) package. These were prioritised from the most urgent and important challenges to the least significant ones.

The AVEC/ELPHA secretariat has received a number of positive responses from the European Commission, although we remain concerned that certain important elements of the AHL package will not be amended by the Commission. AVEC will continue to support its members in the application of the AHL and encourage national discussions and exchanges to facilitate its implementation.

### Avian influenza in Europe

According to the European Food and Safety Authority's latest overview of HPAI, around 5,300 detections of highly pathogenic avian influenza virus were reported in poultry, captive and wild birds in 36 EU/EEA countries and the UK during the 2021–2022 epidemic season.





This is the largest number of HPAI cases for an epidemic season ever reported. The persistence of the HPAI (H5) virus in wild birds indicates that it may have become endemic in wild bird populations in Europe.

Within this same epidemic season, a total of 2,398 outbreaks in domestic poultry led to the culling of 46 million birds in affected establishments.

More than half of poultry outbreaks in Europe were due to secondary spread from infected poultry to other poultry farms. In addition, 168 outbreaks were detected in captive birds, and there were 2,733 HPAI detections in wild birds in 36 European countries.

The current 2021–2022 HPAI epidemic season is still ongoing, with cases in poultry and wild birds reported up to June 2022.

The European Commission has been working on a delegated act to establish rules for vaccination against category A diseases, including avian influenza. In parallel, both research and development projects as well as trials with vaccines are ongoing in several member states.

In March 2022, AVEC organised a webinar to illustrate the scientific and legislative cornerstones of a potential vaccination strategy. Together with international experts, this discussed the pros and cons of vaccination and its impact on trade. However, one thing is quite clear, we need new tools to fight against AI and therefore we need clear trade rules with third countries.



“ AVEC is engaged in ongoing discussions on the potential use of vaccination against HPAI. However, this additional tool to protect our flocks can only be put into use if the question of trade restrictions can be solved. ”



## AVEC Working group on food safety and food quality

### Food safety and food quality at a glance

After two years of the COVID-19 crisis, during which the poultry industry showed great strength and resilience, it was hoped that 2022 would be a year of reconstruction. Instead, given the events in Ukraine, the sector now has many new challenges to overcome, including maintaining its high quality standards while simultaneously dealing with shortages of raw materials and energy that are essential to the production processes.



Chair, Julie Mayot



At the same time, the sector is being directly impacted by several legislative projects led by the European Commission, including a revision of the Food Information to Consumer Regulation (1169/2011), during which the question of labelling of origin will be discussed. On this subject, AVEC has been advocating for the mandatory inclusion of an EU/non-EU label on all fresh and processed products at all stages of the food chain. Separately, a proposal from the Commission is expected on harmonised front-of-pack nutrition labelling, and potentially a revision of date-marking, in order to decrease food waste. The working group has discussed and shared positions on these topics and is ready to examine the Commission's draft, which is expected in the coming months.

### Management of contaminants

The group is also involved in ongoing discussions around contaminants, especially salmonella and campylobacter, following reports from the European Food Safety Authority (EFSA), plus possible revisions of the legislation. A series of webinars on contaminants were held which were open to AVEC members, along with specialists from the food sector such as quality managers, directors and veterinarians. The webinars each attracted around 80 participants and provided an excellent opportunity to hear about the latest research from leading centres such as ILVO (Flanders), Liverpool and Padova. The working group will continue with the webinar series in 2023.

### Revision of the marketing standards regulation

Members of the working group are actively engaged in discussions relating to the marketing standards regulation, which is currently being revised. A draft is expected by the end of 2022.

European marketing standards for poultry meat have generally proved to be a successful and effective instrument for ensuring the continuity and proper functioning of common market principles within the European Union. Industry, trade, controlling authorities and consumers benefit from the application of the marketing standards.







AVEC supports the need to maintain marketing standards for the poultry meat sector in order to define harmonised standards and contribute to the proper functioning of the internal market for the trade of poultry meat. The existing standards have successfully ensured that products circulating within the EU market meet minimum quality levels, providing transparency to consumers across the EU.

However, the standards have undergone minimal changes since being drawn up several decades ago, even though the sector has evolved considerably. We are therefore in favour of

revisions to several sections. Within the marketing standards ad hoc working group, a common position has been found on the definitions of poultry cuts, quality checks (grade A/B) and water content. Likewise, a suggestion for amending the list of rearing systems has been discussed.

AVEC hopes its input will contribute to updated regulations which will on the one hand recognise key elements that are specific to the poultry market, while on the other hand being simple to implement, thereby effectively protecting the European market.



“ The sector is focused on continuously developing more sustainable production methods that favour enhanced animal welfare, alongside efficiency, affordability and food safety. These enhancements will build upon the many improvements that have already been put in place. ”



## AVEC Working group on sustainable production

The issue of sustainability has become even more central to AVEC in the context of the launch of the European Green Deal, the flagship initiative of the von der Leyen Commission.

With the ambition to be the first climate-neutral continent by 2050, EU authorities are working on multiple initiatives which have been discussed during our working group meetings. These include:

- animal welfare
- deforestation
- reduction of greenhouse gas emissions
- packaging

The aim of the working group is to demonstrate that the poultry meat sector can and will be more sustainable in the future, and that when it comes to climate change, poultry is part of the solution.

### AVEC Sustainability Charter

During the 2021 General Assembly in Berlin, AVEC and its members made a commitment to developing a sustainability charter. The aim of this charter is to improve the sustainability of the poultry meat sector in line with the objectives of the Green Deal and the Farm to Fork Strategy. It will focus on finding the best balance between the three pillars of sustainability: environmental, social and economic.

### Feed sustainability

The working group has identified that the environmental impact of feed is responsible for 50–60% of the sector's emissions, and is working towards the reduction of the use of unsustainable soy, with a move towards other sources of protein.



Chair, Saulius Petkevicius

### Sustainable packaging

The group has reflected on product packaging with the aim of reducing the use of both plastic and polystyrene, while also developing and using more recyclable materials.

### Transition towards renewable energy

The crisis in Ukraine has exacerbated the need for sustainable alternatives to coal and gas for heating systems, both at farm and slaughterhouse levels. Options such as the use of heat pumps, solar panels, biogas or biomass heating could be considered. The issue of energy supply will be crucial in the upcoming winter season, and the working group will focus on this issue.

These topics will form part of the final version of the sustainability charter, which is expected to be published in late 2022.

### Proposal from the Commission on commodities associated with deforestation

In November 2021, the European Commission unveiled its proposal for a regulation on deforestation-free products. The Commission has targeted six commodities that should not contribute to deforestation: coffee, cocoa, cattle, palm oil, wood and soy.



The working group has reflected on the position of the poultry meat sector in close collaboration with FEFAC, the EU association for feed producers. A focus for discussion has been the impact of the use of soybean meal.

AVEC supports the objective of the proposed legislation in minimising the risk of deforestation, but has made clear that legislation should not further contribute to the surge in feed prices. It also highlighted the need for a more flexible system that does not require the full segregation of the supply chain.

Finally, a major weakness of the proposal lies in the fact that poultry meat imported from third countries could continue to be produced using soy linked to deforested areas. This is not acceptable, and AVEC hopes that Members of the EU Parliament and the Council will correct this in the upcoming discussions in these two institutions.

### **Revision of the Industrial Emissions Directive**

In April 2022, the Commission presented its plans to modify the Industrial Emissions Directive, which is the legislation defining which activities should require a permit for their environmental emissions (water, soil, air).

Previously the poultry sector was included in the BREF for intensive rearing of poultry and pigs, and farms above 40,000 places. The new threshold will be set at 150 livestock units,

meaning that the directive will apply to all installations with more than 21,000 broilers. This will lead to a significant increase in the administrative and financial burden for poultry farmers, while again not applying to poultry meat that is produced in third countries.

The working group has raised the potential threats of this proposal to the sector with the Commission, and is working on a position paper that will be defended during the following stages of the legislative process.

### **BREF on slaughterhouses and by-product**

In parallel, a group of AVEC experts is working on the revision of the BREF document on slaughterhouses and animal by-products. The group is participating in consultation meetings with the Commission, member states and NGOs that aim to agree the “best available technique (BAT) conclusions”. These will establish emission limit values for EU slaughterhouses. The final version of this document is expected by the end of the year.

Over the past year, the working group has defined objectives that will make the poultry meat sector even more sustainable. These will be included the sustainability charter, although more work needs to be done on areas including circularity, carbon neutrality and the use of renewable energy. In the year to come the group will focus on these issues in order to communicate that poultry is a sustainable solution to feed the world.

“ Over the past 15 years, breeding improvements have contributed to a reduction in the amount of feed needed to produce 1kg of poultry meat. This has led to a drastic reduction in the amount of land used to produce this feed (-37%) and ultimately to a reduction in greenhouse gas emissions (-15%). ”



## AVEC Working group on trade

### Another turbulent year for the poultry sector

At AVEC we defend both the offensive and defensive trade interests of the EU poultry sector. Since the launch of the EU Green Deal and the Farm to Fork Strategy, a lot of discussion, speculation and uncertainty about the EU's policy approach has kept AVEC's secretariat and members busy as they formulate clear business positions to protect EU poultry production, along with trade with third countries.

### The need for a level playing field and reciprocity in international trade

As part of a trade-oriented sector, poultry meat producers have always been against protectionism and open for trade with other countries. However, this must be underpinned by a level playing field which ensures that imported poultry meat is produced according to identical requirements and standards as are applied to poultry meat production in the EU.

A variety of legislative proposals from the European Commission risk significantly impacting poultry production and adding



Chair, Stig  
Munck Larsen

to the cost of exporting poultry meat. This legislation relates to areas such as deforestation-free products, preventing carbon leakage from fertiliser, and animal welfare initiatives. The European Commission has proposed a Regulation on banning imports of soy from deforested areas. This unfairly discriminates against the interests of AVEC's members as no equivalent ban applies if soy from deforested areas is used in the production of poultry meat that is exported to the EU. This lacks logic, and puts EU poultry producers at a competitive disadvantage relative to imported poultry meat.

AVEC is concerned about legislative provisions that could add more requirements to the production of poultry meat in the EU, without a similar obligation to apply identical rules all the way down the value chain for imports of poultry meat from third countries. AVEC strongly advocates that imports from third countries should also meet EU standards, and that new free trade agreements or revisions to existing agreements should incorporate identical standards for imported poultry meat.

### Trade hurdles resulting from HPAI outbreaks

For almost two years, European poultry production has been heavily impacted by numerous HPAI outbreaks in almost all EU member countries. Many thousands of cases of HPAI were detected in wild birds and commercial poultry flocks at the end of 2020, and the worrying message from experts is that avian influenza in wild birds will become more prevalent in the future due to changes in bird migration routes and destinations. Good biosecurity practices at farm level are becoming increasingly important in order to reduce the risk of outbreaks in commercial flocks, combined with the suspension of exports to third countries and from countries or areas with outbreaks. It has become even more important to agree and respect international rules on regionalisation among WOAHA members, and to administer HPAI vaccine, at least for the most exposed flocks when it is scientifically and practically possible to do so. This



should be done without disrupting ordinary trade as a result of unjustified bans on HPAI vaccine being used as camouflaged trade barriers.

#### **The consequences of the war in Ukraine:**

Before the Russian invasion, AVEC was concerned about the uncertainty of reaching an agreement with Ukraine about a certificate for the export of machine-separated meat. During the ongoing revision of the Economic Partnership Agreement between the EU and Ukraine, Ukraine had requested a higher duty-free quota of breast meat for export to the EU. Bearing in mind that a previous concession was made to Ukraine that resulted in an increase of the duty-free quota by 50,000 tonnes annually, AVEC is concerned about the negative impact that further concessions would have on EU poultry production. The trade situation has changed significantly as a result of the war in Ukraine. AVEC supports Ukraine in maintaining its poultry production in order to provide poultry meat for domestic consumption, along with exports based on current trade agreements. However, AVEC is concerned that if exports from Ukraine to countries outside the EU are blocked, these exports could be redirected to the EU. The EU decision to provide free access for all products from Ukraine for one year is supported by AVEC, but a further extension of free access for poultry meat beyond the established quotas remains a serious concern for a sensitive sector like EU poultry.

#### **The need for constructive solutions in the trade with South Africa**

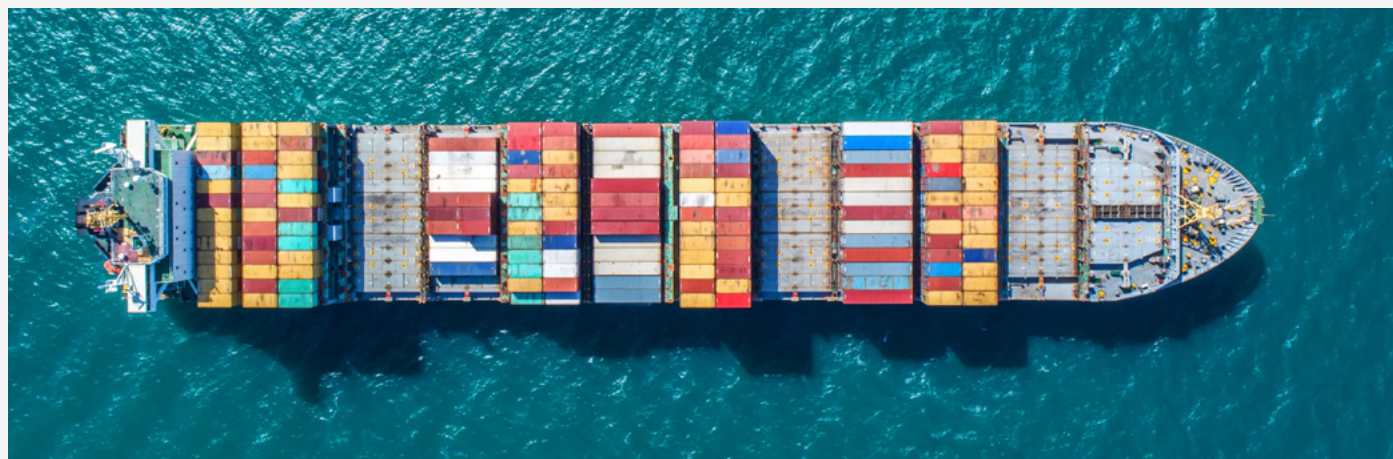
After a longstanding procedure, and while safeguard tariffs had already expired, the arbitrators ruled in favour of EU in the bilateral dispute over a safeguard measure imposed by SACU on EU imports of frozen chicken cuts.

The panel found that the “safeguard measure was not proportionate and went beyond what was needed to remedy or prevent any serious injury or disturbances.”

It demonstrates what AVEC claimed since the beginning, that the measures were not justified, and it shows to EU authorities that it is worth engaging in the battle against protectionist measures.

While anti-dumping duties against Germany, the Netherlands and UK have been extended for another five years, the South African International Trade Administration Commission has recommended to impose anti-dumping duties on imports from Spain, Poland, Ireland and Denmark.

However, in a surprising move, South African Trade Ministry has suspended by 12 months the application of the duties, due to the inflation affecting South Africa.



While AVEC finds that the imposition of these measures is not justified, the delay in implementation demonstrates the role of the imports of high-quality EU poultry in the food security of South Africa.

On the SPS front, an AVEC delegation met recently in Pretoria with poultry stakeholders from the value chain, along with the competent authorities to facilitate the finding of a solution on regionalisation and recognition of disease-free status along with the WOH rules.



AVEC encourages the European Commission to find a pragmatic political solution which will benefit both sides and reopen the door to EU poultry meat exports.

### **Brexit and its consequences**

Regarding the implementation of Brexit and the Free Trade Agreement, the UK has decided to postpone the introduction of border control and documentation requirements until the end of 2023, in order to be fully prepared and to avoid the risk of not being able to handle imports from the EU in a safe and timely manner. The UK is currently designing a new Target Operating Model for imports from third countries, which will frame the rules and requirements for trade. This is expected to be launched in the fourth quarter of 2022.

### **Identifying new export opportunities**

As a result of HPAI outbreaks and the closing of significant existing export markets, it has become increasingly important to open new markets, preferably providing market access under the umbrella of EU free trade agreements, where trade barriers and import tariff duties are removed. The transition to full implementation of an FTA often takes a long time, and requires additional technical agreements. As part of the FTA with South Korea, an agreement on regionalisation has finally been reached. Meanwhile, AVEC members are still waiting for the ratification of the agreement with Mexico by European Parliament and Council. This delay prevents our producers from benefiting from new export opportunities.

The trade priority for AVEC over the coming year is to secure commitment from the European Commission and the European Parliament to defend EU trade policy and its proper implementation, and to push for swift solutions to technical barriers to trade in order to facilitate the export of poultry meat to current and new destinations.



## EU Promotional campaigns

The promotional campaign “This is European poultry! High-quality poultry with European guarantee” came to an end in December 2021. Co-financed by the EU, this initiative brought together AVEC and five of its members (BVG, CIDEF, KRD-IG, NEPLUVI and UNAITALIA) to raise awareness of the high standards of poultry meat production in Europe. Over the two years, the €5.5 million EU poultry campaign generated 854 million occasions of contact, more than three times its initial objective, thus ensuring very broad coverage of the campaign messages.

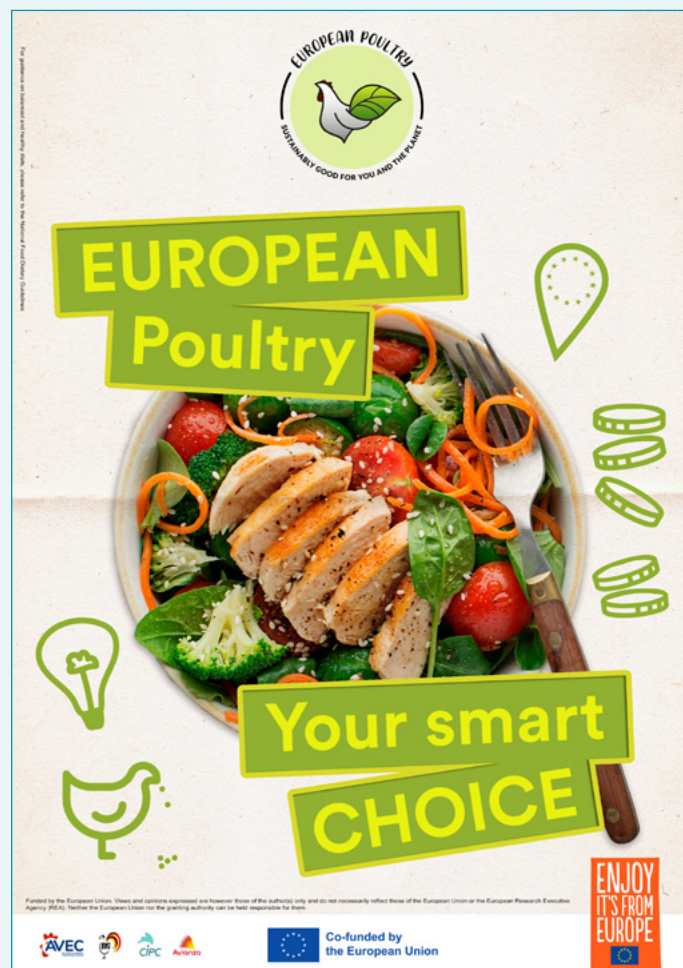
There was barely time to reflect on the success of this first promotional programme before a new one started. SUST EU POULTRY focuses on the sustainability of the European poultry sector, highlighting its commitment to achieving the most sustainable and environmentally-friendly agri-food system in Europe.

With a budget of €3.2m, SUST EU POULTRY is supported by the European Commission and managed by AVEC plus three national poultry associations: BVG in Germany, CIPC (France) and AVIANZA (Spain). Sharing the same branding and key messages, each of the three partners is developing a national campaign promoting the sustainability of European poultry meat through social media channels, advertising, PR activities, physical events and much more. Over the two years of the programme, the target audience is invited to “make the smart choice: and choose European poultry, as the sector strives for



the best balance between the three pillars of sustainability: environmental, social and economic.

Discover more about this initiative on the website [www.eu-poultry.eu](http://www.eu-poultry.eu). European poultry: good for you and the planet.





## AVEC Working group on turkey

Recent months have been particularly difficult for EU turkey production, which has had to face three consecutive crises, and which is currently struggling to maintain its market share of poultry consumption.



*Chair, Yann Brice*

**1. Surge in feed price.** The sharp rise in raw material costs that occurred in the summer of 2021 significantly affected the competitiveness of the turkey sector. The ITAVI index (<https://www.itavi.asso.fr>) shows a cost increase of nearly 50% between May 2021 and August 2022, rising to more than 80% since September 2020. Considering the higher feed conversion ratio for turkey compared with chicken, this sudden increase makes competing with chicken meat harder.

**2. Avian influenza crisis.** The 2021–2022 Avian influenza epidemic season has severely impacted the European poultry sector, with 36 countries affected, 2,398 commercial outbreaks and 2,900 cases in wildlife or captive birds, according to EFSA. Turkey, a sentinel species, is particularly sensitive to the virus and was hit hard by it, especially in Italy. Production was greatly reduced and, in some cases, markets have been lost due to the absence of product.

**3. The war in Ukraine.** Russia's invasion of Ukraine had immediate consequences for energy and commodity prices. Already under pressure from pre-war increases in feed costs, as outlined above, this further explosion in costs has been detrimental to the development of new outlets.

### Some reasons for optimism

The potential for turkey meat remains significant, and several of our European partners have amplified their efforts to reintroduce turkey meat back into the diet of European consumers, both for home and out-of-home consumption.

For example, our Spanish colleagues have developed a 'healthy charcuterie' niche, while the French have communicated about its positive nutritional profile. Polish colleagues have opted for a health approach by partnering with paediatricians. Some have taken advantage of European funding to highlight the benefits of eating turkey meat, which has led to very positive results.

### European campaign on EU turkey

As part of the European campaign 'This is European poultry', France chose to focus on turkey meat. This proved to be an excellent choice, with numerous positive repercussions that enhanced the image of turkey meat. The initial objectives and targets of the campaign were exceeded. Coverage in the media and across social networks, combined with B2C and B2B events and visits to the campaign website, made it possible to reach nearly two million contacts. These initiatives, carried out over two years, have boosted the profile of turkey meat. By focusing on both taste and nutrition, the French turkey promotion programme has acted as an effective reminder of the advantages of consuming turkey meat.

Committing to a new collective programme to promote European turkey production would certainly be very positive. It is time to make increased communication efforts to highlight the importance of turkey meat. Difference is a strength: it is our role to draw attention to it.







“ European poultry farmers aim to produce affordable quality meat by avoiding any waste. The current poultry production through modern technology minimizes the waste and exploits it in other sectors ”

# Statistics

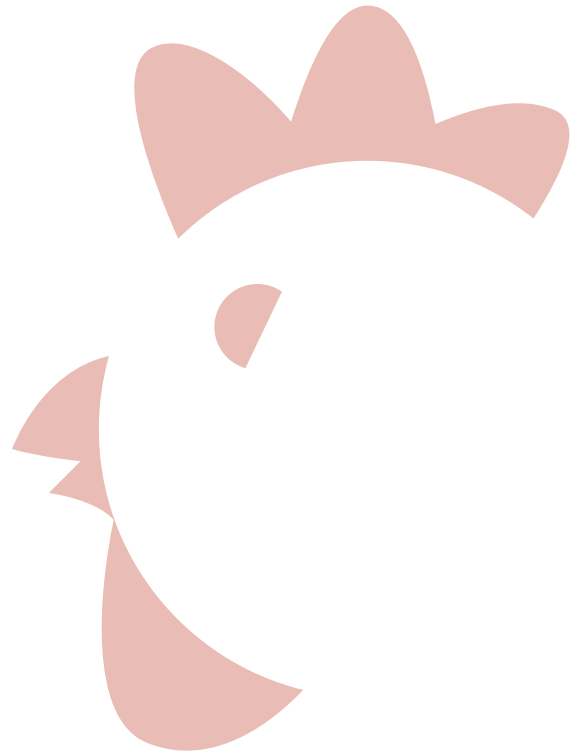
## 1. EU: Balance sheet for poultry meat ('000 tons carcass weight)

	2017	2018	2019	2019	2020	2021
	EU 28	EU 28	EU 28	EU 27	EU 27	EU 27
Gross indigenous production	14.564	15.260	15.635	13.549	13.673	13.557
Export meat	1.532	1.593	1.665	2.499	2.341	2.224
Import of meat	789	802	850	849	709	709
Consumption	13.817	14.462	14.813	11.891	12.037	12.035
Consumption percapita, kg	23,7	24,8	25,3	23,4	23,7	23,6
Self-sufficiency, %	105,5	105,5	105,5	113,9	113,6	112,6

**Note:** Partial, provisional or estimated.

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

“ Poultry meat is tasty, quick to prepare and beneficial as part of a balanced diet. Poultry meat is among the most versatile choices in the kitchen, at home or in restaurants since it can be used in an incredible number of delicious and appetising recipes. ”



# Production (updated 2021)

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

	2016	2017	2018	2019	2020	2021
Austria	125	129	132	134	144	149
Belgium/Luxembourg	462	463	470	417	448	449
Bulgaria	109	107	111	109	102	102
Croatia	81	80	83	85	89	90
Cyprus	20	25	26	27	27	27
Czech Republic	177	183	193	196	200	198
Denmark	156	156	159	169	165	165
Estonia	20	20	19	20	15	15
Finland	121	130	135	140	142	149
France	1.830	1.857	1.788	1.790	1.733	1.684
Germany	1.817	1.802	1.818	1.826	1.807	1.764
Greece	257	246	220	230	240	240
Hungary	620	602	669	688	666	708
Ireland	132	152	160	170	180	170
Italy	1.388	1.354	1.314	1.324	1.390	1.385
Latvia	30	33	33	35	35	36
Lithuania	112	134	108	100	101	102
Netherlands	1.102	1.096	1.038	1.036	996	980
Poland	2.425	2.511	2.597	2.704	2.816	2.750
Portugal	343	337	342	348	349	351
Romania	419	436	480	507	487	495
Slovakia	66	71	75	71	58	60
Slovenia	67	68	69	71	75	75
Spain	1.526	1.454	1.427	1.392	1.420	1.374
Sweden	156	157	155	160	172	177
<b>EU 27</b>	<b>13.565</b>	<b>13.607</b>	<b>13.623</b>	<b>13.750</b>	<b>13.858</b>	<b>13.697</b>
United Kingdom	1.807	1.841	1.940	1.888	1.952	1.950
<b>EU 28</b>	<b>15.372</b>	<b>15.447</b>	<b>15.564</b>	<b>15.638</b>	.	.

**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.

**Source:** MEG according to European Commission, national data, FAO and EUROSTAT

# Production (updated 2021)

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

	2016	2017	2018	2019	2020	2021
Argentina	2.055	2.115	2.069	2.203	2.221	2.247
Brazil	13.523	13.612	13.289	14.203	14.179	14.267
Chile	741	702	761	768	781	800
China	18.880	18.970	19.940	22.390	23.610	23.984
India	3.474	3.804	4.100	4.231	3.821	3.650
Japan	1.545	1.575	1.599	1.633	1.678	1.677
Mexico	3.110	3.242	3.369	3.480	3.605	3.643
Russia	4.229	4.558	4.563	4.573	4.610	4.634
Saudi Arabia	604	655	714	805	933	990
Switzerland	91	95	102	103	107	111
South Africa	1.694	1.675	1.769	1.823	1.973	2.038
Turkey	1.983	2.253	2.300	2.270	2.339	2.412
Ukraine	1.067	981	1.033	1.153	1.253	1.317
USA	20.975	21.409	21.783	22.341	22.582	22.633
<b>World Production</b>	<b>118.981</b>	<b>122.511</b>	<b>126.375</b>	<b>131.938</b>	<b>133.574</b>	<b>135.071</b>

**Note:** Partial, provisional or estimated. Mostly gross domestic production. \*) Only Chicken and Turkey meat.

**Source:** MEG to USDA, FAO and national data.

“ The EU poultry meat sector is fully committed to the responsible use of antibiotics, which means using them ‘as little as possible but as much as necessary’. ”

# Trade

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

	2016	2017	2018	2019	2020	2021	2021 from third countries - EU27
<b>Poultry Meat <sup>1)</sup></b>							
Austria	114	105	103	108	96	104	0
Belgium/Luxembourg	268	288	286	297	275	296	36
Bulgaria	102	111	110	112	100	94	1
Croatia	21	19	21	22	18	21	1
Cyprus	11	11	12	12	10	11	0
Czech Republic	119	109	115	110	113	103	0
Denmark	58	65	73	79	76	62	1
Estonia	21	21	27	22	21	22	0
Finland	9	10	9	8	8	7	0
France	437	442	457	458	437	522	67
Germany	672	694	721	721	679	651	4
Greece	79	80	82	84	72	81	0
Hungary	40	54	54	68	78	66	12
Ireland	90	82	88	77	67	62	14
Italy	59	68	69	67	68	71	1
Latvia	34	40	43	44	45	41	1
Lithuania	35	39	39	42	47	46	1
Malta	6	6	6	6	6	5	0
Netherlands	503	491	573	588	570	697	193
Poland	47	59	79	89	63	73	13
Portugal	67	68	74	73	67	66	2
Romania	137	143	137	122	134	124	7
Slovakia	53	57	83	102	77	58	1
Slovenia	18	18	20	20	18	17	0
Spain	163	182	169	151	127	137	21
Sweden	55	58	55	58	53	57	0
United Kingdom	435	429	445	434	.	.	.
<b>EU 28 from third countries</b>	<b>157</b>	<b>161</b>	<b>234</b>	<b>215</b>	.	.	.
<b>EU 27 from third countries</b>	.	.	.	<b>468</b>	<b>392</b>	<b>373</b>	<b>373</b>
<b>Salted meat<sup>2)</sup></b>							
Germany	50	39	28	30	31	34	20
Netherlands	176	141	121	154	134	143	136
United Kingdom	60	45	36	45	.	.	.
<b>EU 28 from third countries</b>	<b>277</b>	<b>211</b>	<b>176</b>	<b>204</b>	.	.	.
<b>EU 27 from third countries</b>	.	.	.	<b>177</b>	<b>157</b>	<b>160</b>	<b>160</b>
<b>Preparations of poultry<sup>3)</sup></b>							
<b>EU 28 from third countries</b>	<b>401</b>	<b>389</b>	<b>338</b>	<b>338</b>	.	.	.
<b>EU 27 from third countries</b>	.	.	.	<b>178</b>	<b>155</b>	<b>146</b>	<b>146</b>

**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<sup>1</sup>)

	2016	2017	2018	2019	2020	2021	2021 to third countries-EU27
Austria	57	61	63	65	67	72	16
Belgium/Luxembourg	576	578	572	511	528	525	190
Bulgaria	41	44	46	43	32	36	4
Croatia	8	8	9	8	8	11	6
Cyprus	1	1	1	1	1	1	1
Czech Republic	37	24	23	18	16	19	1
Denmark	74	86	83	88	82	69	27
Estonia	7	7	7	9	8	9	0
Finland	16	13	14	14	14	13	3
France	433	425	402	362	326	159	144
Germany	494	482	451	475	415	419	47
Greece	21	29	33	35	34	42	15
Hungary	229	183	213	235	204	225	59
Ireland	74	90	87	107	103	61	43
Italy	177	165	158	167	163	171	62
Latvia	13	18	17	16	16	15	4
Lithuania	47	55	51	46	47	41	11
Malta	1	0	0	0	0	0	0
Netherlands	1.382	1.437	1.495	1.583	1.455	1.329	478
Poland	1.025	1.156	1.325	1.461	1.495	1.470	556
Portugal	27	42	34	27	25	37	14
Romania	57	59	66	75	75	79	21
Slovakia	30	21	37	37	22	22	3
Slovenia	20	22	23	23	21	25	8
Spain	230	216	245	241	215	247	99
Sweden	76	74	76	84	82	81	10
United Kingdom	296	335	361	383	.	.	.
<b>EU 28 to third countries</b>	<b>1.506</b>	<b>1.483</b>	<b>1.578</b>	<b>1.686</b>	.	.	.
<b>which were</b>							
Chicken	1.323	1.317	1.419	1.526	.	.	.
Turkey	151	140	127	133	.	.	.
<b>EU 27 to third countries</b>	.	.	.	<b>2.167</b>	<b>2.029</b>	<b>1.808</b>	<b>1.808</b>
<b>Preparationsofpoultry<sup>3)</sup></b>	.	.	.	.	.	.	.
<b>EU 28 to third countries</b>	<b>39</b>	<b>41</b>	<b>44</b>	<b>54</b>	.	.	.
<b>EU 27 to third countries</b>	.	.	.	<b>245</b>	<b>247</b>	<b>245</b>	<b>245</b>

**Notes:** 1) Without preparations, livers and 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

	2016	2017	2018	2019	2020	2021
<b>Total imports of poultry meat</b>						
Switzerland	46	45	45	46	43	46
<b>Imports of broiler meat</b>						
Angola	205	267	317	266	213	255
China	430	311	342	580	999	785
Hong Kong	344	390	.	.	.	.
Iraq	563	444	527	493	468	375
Japan	973	1.056	1.074	1.076	1.005	1.050
Russian Federation	220	225	225	224	200	220
Saudi Arabia	878	711	629	601	618	600
United Arab. Emirates	422	439	579	601	618	520
<b>Exports of broiler meat</b>						
Argentina	158	178	125	155	155	150
Belarus	145	150	168	174	190	184
Brazil	3.889	3.835	3.675	3.811	3.875	4.225
Chile	.	.	111	131	136	133
China	386	436	447	428	388	455
Thailand	690	757	826	881	941	930
Turkey	263	357	418	408	442	490
Ukraine	236	263	317	409	428	410
USA	3.086	3.137	3.244	3.259	3.376	3.367

Source: MEG to USDA and national data.

“ The European sector is continuously improving transparency and innovation: high animal health and welfare standards are assured throughout the production chain from Farm to Fork. ”

# Consumption

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

	2016	2017	2018	2019	2020	2021
Austria	21,2	20,8	21,0	20,9	21,0	21,0
Czech Republic	23,2	23,5	24,0	25,0	25,5	25,3
Denmark	24,5	23,5	25,6	27,6	27,4	27,0
Finland	20,7	23,1	23,6	24,3	24,4	25,7
France	26,5	27,6	29,5	28,3	28,4	28,6
Germany	20,8	20,8	22,2	22,0	22,3	21,9
Greece	20,0	18,9	19,0	20,2	20,0	21,0
Hungary	31,1	32,0	32,5	32,9	33,0	33,5
Ireland	35,0	34,0	36,0	35,0	35,0	36,0
Italy	20,3	20,7	20,5	20,3	21,7	21,7
Latvia	23,0	22,5	.	23,5	25,0	24,5
Lithuania	23,5	24,0	24,5	26,0	26,0	27,0
Netherlands	22,2	22,1	22,5	22,9	22,1	.
Poland	29,2	27,6	30,0	28,6	29,5	29,0
Portugal	37,0	35,3	37,1	28,4	38,0	36,9
Slovakia	20,1	21,0	20,5	22,0	21,5	20,0
Spain	31,4	30,5	30,0	29,5	31,1	29,9
Sweden	23,7	23,3	22,2	22,4	21,8	23,1
<b>EU 28</b>	<b>23,8</b>	<b>23,7</b>	<b>24,8</b>	<b>25,3</b>	.	.
<b>EU 27</b>	.	.	.	<b>23,4</b>	<b>23,7</b>	<b>23,6</b>
Switzerland	18,9	17,8	18,4	18,4	18,4	19,1
United Kingdom	28,7	28,9	29,7	29,8	.	.

**Note:** Partial, provisional or estimated.

**Source:** MEG according to European Commission, national data, FAO and EUROSTAT.



# Consumption

## 8. Self-sufficiency in poultry meat (%)

	2016	2017	2018	2019	2020	2021
Austria	68	70	71	72	77	80
Czech Republic	69	68	67	68	67	70
Finland	97	95	98	96	98	98
France	104	99	96	89	88	87
Germany	106	105	99	100	97	97
Greece	75	75	76	80	82	82
Hungary	140	127	130	132	123	129
Ireland	87	93	89	98	102	101
Italy	109	108	107	108	107	108
Latvia	64	70	.	62	61	63
Lithuania	112	115	111	103	100	95
Netherlands	188	186	180	161	160	.
Poland	219	240	228	249	251	250
Slovakia	73	70	.	.	.	.
Spain	105	102	105	107	106	109
Sweden	103	105	115	116	.	.
<b>EU 27</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>114</b>	<b>114</b>	<b>113</b>
United Kingdom	93	95	96	97	.	.
<b>EU 28</b>	<b>105</b>	<b>105</b>	<b>106</b>	<b>106</b>	<b>.</b>	<b>.</b>

**Note:** Partial, provisional or estimated.

**Source:** 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)

	2016	2017	2018	2019	2020	2021
Austria	107	110	114	117	118	125
Belgium/Luxembourg	453	455	462	440	441	442
Bulgaria	86	87	87	89	87	88
Cyprus	24	25	25	27	27	27
Czech Republic	159	165	170	174	177	177
Denmark	155	154	157	167	164	164
Estonia	20	20	19	20	20	20
Finland	113	122	127	132	135	140
France	1.133	1.163	1.185	1.187	1.179	1.187
Germany	1.290	1.300	1.345	1.330	1.320	1.310
Greece	156	151	185	185	185	185
Hungary	394	409	414	436	462	476
Ireland	160	180	190	205	210	200
Italy	981	1.034	1.001	1.015	1.100	1.100
Croatia	67	67	69	70	71	72
Latvia	30	33	33	35	35	35
Lithuania	105	126	103	97	97	98
Malta	4	4	4	4	4	4
Netherlands	1.001	999	1.003	1.001	961	950
Poland	.	2.055	2.115	2.207	2.243	2.197
Portugal	278	287	289	294	293	293
Romania	360	388	415	415	400	420
Slovakia	57	80	80	80	80	80
Slovenia	62	63	64	65	69	69
Spain	1.268	1.250	1.191	1.151	1.180	1.140
Sweden	136	148	150	154	167	172
<b>EU 27</b>	<b>10.476</b>	<b>10.874</b>	<b>10.997</b>	<b>11.097</b>	<b>11.225</b>	<b>11.171</b>
United Kingdom	1.535	1.630	1.750	1.749	.	.
<b>EU 28</b>	<b>12.047</b>	<b>12.539</b>	<b>12.782</b>	<b>12.892</b>	.	.
Argentina	2.119	2.150	2.068	2.171	2.190	2.290
Brazil	13.523	13.612	13.555	13.690	13.880	14.500
China	12.448	11.600	11.700	13.750	14.600	14.700
India	3.464	3.767	4.062	4.188	.	.
Indonesia	2.301	3.176	3.410	3.495	3.495	.
Iran	2.142	2.182	2.231	2.280	.	.
Mexico	3.275	3.400	3.485	3.600	3.725	3.815
Russia	4.328	4.542	4.543	4.606	4.577	4.725
South Africa	1.500	1.335	1.407	1.395	1.510	1.495
Thailand	2.813	2.990	3.170	3.300	3.250	3.280
USA	18.510	18.938	19.361	19.941	20.255	20.378
<b>World</b>	<b>106.737</b>	<b>110.857</b>	<b>115.013</b>	<b>118.017</b>	<b>119.505</b>	<b>119.85</b>

# Broiler

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

	2016	2017	2018	2019	2020	2021
Austria	14,6	14,5	14,9	15,0	15,1	15,2
France	18,0	19,0	19,5	20,1	20,7	21,8
Germany	12,9	13,3	14,3	14,4	14,9	15,0
Italy	12,5	.	.	.	.	.
Netherlands	20,2	20,4	.	.	.	.
Portugal	.	.	.	.	.	.
<b>EU 28</b>	<b>19,2</b>	<b>19,2</b>	<b>20,2</b>	<b>20,8</b>	.	.
United Kingdom	23,2	.	.	.	.	.
<b>EU 27</b>	.	.	.	<b>19,1</b>	<b>19,4</b>	<b>19,5</b>

Third Countries						
Argentina	44,9	44,7	46,3	45,1	45,7	47,1
Brazil	46,4	47,0	46,2	46,8	47,6	48,4
China	8,8	8,1	8,1	9,7	10,6	10,4
India	2,6	2,8	3,0	3,2	2,8	.
Japan	20,2	21,1	21,7	22,0	22,2	22,4
Mexico	32,9	33,6	34,1	35,0	35,3	36,4
South Africa	32,1	31,4	32,5	31,2	32,0	30,5
USA	48,1	48,7	49,5	50,8	51,2	51,4

**Note:** Partial, provisional or estimated

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

“ As well as creating direct and indirect jobs, the poultry sector is important for supporting schools, shops and rural life in areas that are often confronted with a rural exodus. ”

# Turkey

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

	2016	2017	2018	2019	2020	2021
Austria	18	18	18	16	18	19
Belgium/Luxembourg	8	8	7	8	7	7
Bulgaria	0	0	0	0	0	0
Croatia	13	12	14	15	17	17
Cyprus	0	0	0	0	0	0
Czech Republic	9	7	10	10	10	10
Denmark	1	1	1	1	1	1
Finland	8	8	8	8	6	9
France	382	369	338	339	328	305
Germany	407	387	360	388	390	363
Greece	3	3	3	3	3	3
Hungary	101	97	98	96	100	91
Ireland	26	25	27	29	31	33
Italy	331	309	301	301	313	303
Malta	0	0	0	0	0	0
Netherlands	28	28	28	.	.	.
Poland	.	376	384	408	392	360
Portugal	38	40	42	44	47	49
Romania	10	10	14	15	15	15
Slovakia	1	1	1	1	1	1
Slovenia	5	5	5	6	6	6
Spain	187	200	233	236	235	230
Sweden	4	5	5	5	5	5
<b>EU 27</b>	<b>1.915</b>	<b>1.907</b>	<b>1.896</b>	<b>1.956</b>	<b>1.953</b>	<b>1.853</b>
United Kingdom	166	147	157	148	150	130
<b>EU 28</b>	<b>2.080</b>	<b>2.054</b>	<b>2.052</b>	<b>2.103</b>	.	.
Brazil	529	551	556	570	584	.
Canada	183	171	169	165	158	.
Mexico	17	16	17	17	17	.
Russia	110	100	.	.	.	.
South Africa	596	596	596	596	596	.
USA	2.713	2.713	2.666	2.639	2.605	2.521
<b>World</b>	<b>6.015</b>	<b>5.887</b>	<b>6.024</b>	<b>5.961</b>	<b>5.993</b>	<b>5.800</b>

# Turkey

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

	2016	2017	2018	2019	2020	2021
Austria	5,1	4,8	4,7	4,4	4,5	4,5
France	4,8	4,7	4,4	4,4	4,5	4,1
Germany	6,0	5,7	5,9	5,8	5,8	5,3
<b>EU 28</b>	<b>4,1</b>	<b>4,0</b>	<b>4,0</b>	<b>4,1</b>	.	.
<b>EU 27</b>	.	.	.	<b>3,9</b>	<b>3,8</b>	<b>3,7</b>
USA	7,5	7,4	7,3	7,3	7,1	6,9

**Note:** Partial, provisional or estimated.

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

“Poultry is produced on more than 25,000 family farms in the EU, and companies are happy to support this type of farming. Farms are supported by teams of specialists including veterinarians, engineers and transport crews, who all contribute to the rural economy and maintain the sector’s high standards.”

# Duck

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

	2016	2017	2018	2019	2020	2021
Austria	0,1	0,1	0,4	0,5	0,6	0,7
Belgium/Luxembourg	0,1	0,1	0,1	0,1	0,1	0,1
Denmark	1,0	1,8	1,2	1,5	1,3	1,3
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	206,2	203,6	227,3	226,3	193,5	166,0
Germany	48,5	40,5	41,4	38,9	30,7	24,4
Greece	0,1	0,1	0,1	0,1	0,1	0,1
Ireland	5,2	5,8	5,8	4,5	5,0	5,5
Italy	6,9	5,5	6,0	4,0	4,0	4,2
Netherlands	16,0	18,0	19,0	.	.	.
Portugal	10,0	10,1	10,6	10,6	9,7	9,8
Spain	4,1	3,7	3,2	4,6	4,5	4,3
Sweden	0,0	0,0	0,0	0,0	0,0	0,0
Bulgaria	22,5	19,6	23,1	19,8	19,0	19,0
Cyprus	0,0	0,0	0,0	0,0	0,0	0,0
Czech Republic	9,0	11,1	12,2	11,0	12,0	10,0
Estonia	.	.	.	.	.	.
Hungary	79,5	68,0	122,9	118,4	82,5	116,0
Latvia	.	.	.	.	.	.
Lithuania	0,1	0,1	0,1	0,0	0,0	0,0
Malta	.	.	.	.	.	.
Poland	59,1	47,5	45,0	52,2	70,1	67,2
Romania	.	.	.	.	.	.
Slovakia	0,4	0,4	0,4	0,6	0,6	0,6
Slovenia	.	.	.	.	.	.
<b>EU 27</b>	<b>510,0</b>	<b>475,0</b>	<b>555,0</b>	<b>550,0</b>	<b>500,0</b>	<b>495,0</b>
United Kingdom	29,957	30,6	30,4	29,9	22,3	.
<b>EU 28</b>	<b>540,0</b>	<b>505,6</b>	<b>585,4</b>	<b>577,9</b>	.	.
<b>World</b>	<b>4.443,0</b>	<b>4.631,9</b>	<b>4.928,6</b>	<b>5.013,4</b>	<b>4997,6</b>	.

**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. a) Poultry meat market projections for the EU, 2021–2031 ('000 tonnes carcass weight equivalent)

	avg 2019–2021	2022	2023	2024	2025	2026
Gross indigenous production	13 587	13 670	13 777	13 812	13 866	13 894
Consumption	11 978	12 240	12 303	12 360	12 421	12 461
per capita consumption (kg r.w.e.)*	23.5	24.0	24.1	24.2	24.3	24.4
Imports (meat)	756	722	762	795	800	806
Exports (meat)	2 355	2 206	2 231	2 220	2 222	2 243
Net trade (meat)	1 599	1 485	1 469	1 425	1 422	1 437
EU market price in EUR/t	1 883	1 960	1 978	1 977	1 988	1 995

	2027	2028	2029	2030	2031
Gross indigenous production	13 928	13 971	14 028	14 078	14 136
Consumption	12 486	12 503	12 545	12 557	12 585
per capita consumption (kg r.w.e.)*	24.5	24.6	24.7	24.7	24.8
Imports (meat)	813	820	822	824	826
Exports (meat)	2 268	2 296	2 321	2 348	2 377
Net trade (meat)	1 455	1 476	1 499	1 524	1 551
EU market price in EUR/t	2 005	2 003	1 999	1 997	2 000

\*r.w.e. = retail weight equivalent; Coefficient to transform carcass weight into retail weight is 0.88 for poultry meat.

**Source:** EU Agricultural Outlook, for markets, income and environment 2021–2031, The European Commission, DG AGRI, December 2021 ([https://agriculture.ec.europa.eu/news/eu-agricultural-outlook-2021-31-sustainability-and-health-concerns-shape-agricultural-markets-2021-12-09\\_en#moreinfo](https://agriculture.ec.europa.eu/news/eu-agricultural-outlook-2021-31-sustainability-and-health-concerns-shape-agricultural-markets-2021-12-09_en#moreinfo))

# Projections

## 15. b) Aggregate meat market projections for the EU, 2021–2031 ('000 tonnes carcass weight equivalent)

	avg 2019–2021	2022	2023	2024	2025	2026
Gross indigenous Production	44 726	44 952	44 571	44 227	43 844	43 652
Consumption	38 018	38 189	38 107	38 029	37 907	37 812
per capita consumption (kg r.w.e.)*	67.8	68.0	67.8	67.8	67.6	67.5
of which beef and veal meat	10	10	10	10	10	10
of which sheep and goat meat	1	1	1	1	1	1
of which pig meat	33	32	32	32	32	32
of which poultry meat	24	24	24	24	24	24
Imports (meat)	1 400	1 393	1 443	1 474	1 485	1 499
Exports (meat)	7 781	7 891	7 597	7 356	7 126	7 082
Net trade (meat)	6 381	6 497	6 154	5 883	5 642	5 583

	2027	2028	2029	2030	2031
Gross indigenous Production	43 438	43 298	43 155	43 034	42 917
Consumption	37 659	37 546	37 439	37 332	37 236
per capita consumption (kg r.w.e.)*	67.3	67.2	67.1	67.0	67.0
of which beef and veal meat	10	10	10	10	10
of which sheep and goat meat	1	1	1	1	1
of which pig meat	32	31	31	31	31
of which poultry meat	25	25	25	25	25
Imports (meat)	1 514	1 525	1 529	1 535	1 540
Exports (meat)	7 054	7 038	7 023	7 009	6 998
Net trade (meat)	5 540	5 513	5 494	5 474	5 458

\*r.w.e. = retail weight equivalent; Coefficient to transform carcass weight into retail weight is 0.88 for poultry meat.

**Source:** EU Agricultural Outlook, for markets, income and environment 2021–2031, The European Commission, DG AGRI, December 2021 ([https://agriculture.ec.europa.eu/news/eu-agricultural-outlook-2021-31-sustainability-and-health-concerns-shape-agricultural-markets-2021-12-09\\_en#moreinfo](https://agriculture.ec.europa.eu/news/eu-agricultural-outlook-2021-31-sustainability-and-health-concerns-shape-agricultural-markets-2021-12-09_en#moreinfo))



# EU27 poultry meat import trade, main tariff lines, 2010, 2015, 2020, 2021

## IMPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2020	2021	2020	2021
<b>0207 (poultry)</b>	<b>MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN</b>	3.812.126	3.770.659	3.917.463	3.736.841	126,95	107,81
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens'	98.376	86.896	132.503	89.352	119,95	127,33
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus Domesticus	213.510	200.975	273.866	85.303	190,94	282,88
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	604.163	1.235.079	23,45	22,48
02071350	Fresh or chilled breasts and cuts thereof of fowls of the species Gallus domesticus, with bone in	98.891	91.298	367.854	354.305	164,94	190,74
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	126.628	30.214	194,31	177,75
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.025.470	994.569	820.286	698.089	200,81	215,18
02071460	Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in	298.820	321.201	288.378	242.949	108,75	104,67
02072710	Frozen boneless cuts of turkeys of the species domesticus	179.093	134.244	135.806	68.537	376,82	326,02
<b>02109939</b>	<b>MEAT, SALTED, IN BRINE, DRIED OR SMOKED</b>	1.641.916	2.176.183	1.570.055	1.600.684	186,77	180,90
<b>1602 (poultry)</b>	<b>PREPARED/PRESERVED MEAT</b>	2.933.317	2.836.058	1.550.393	1.462.836	362,19	345,00
160231	<b>TURKEYS</b>	810.247	475.735	33.359	49.351	522,86	402,82
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	778.901	439.802	19.012	38.600	400,27	322,23
160232	<b>GALLUS DOMESTICUS</b>	1.990.264	2.208.354	1.388.684	1.266.999	350,08	332,04
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	141.024	140.179	54.107	7.034	269,27	623,91
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	1.196.297	1.433.683	1.091.749	1.063.220	360,44	329,31
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	595.092	196.773	175.337	325,95	329,26
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.)	14.484	39.397	46.053	21.407	302,48	394,25
160239	<b>OTHER</b>	121.871	146.855	123.948	143.815	449,21	437,69
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	110.381	124.781	108.724	122.738	458,25	463,29

Source: Extraction EUROSTAT, July 2022

# EU27 poultry meat export trade, main tariff lines, 2010, 2015, 2020, 2021

## EXPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2020	2021	2020	2021
<b>0207 (poultry)</b>	<b>MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN</b>	14.297.561	17.533.139	20.288.096	18.079.397	132,57	153,02
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	646.987	700.629	144,33	183,90
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	2.227.014	2.328.398	116,88	124,52
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus domesticus	1.031.595	1.186.344	1.913.184	2.283.200	332,42	346,90
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	2.696.583	2.721.788	4.138.802	3.359.615	88,88	102,99
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	1.067.747	1.612.613	1.738.126	1.474.411	94,24	107,58
02071430	Frozen whole wings, with or without tips of Gallus domesticus	831.325	1.527.185	1.935.870	1.540.582	123,95	116,54
02071460	Frozen legs and cuts thereof of fowls of the species gallus	496.374	1.024.605	1.032.900	866.511	92,39	94,17
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	759.747	564.188	92,16	83,31
02072710	Frozen boneless cuts of turkeys of the species domesticus	343.083	270.540	249.415	169.738	184,58	195,21
02072730	Frozen whole wings, with or without tips, of turkeys	230.471	384.839	368.572	363.992	113,69	152,62
0207 other		3.708.396	4.560.753	5.277.479	4.428.134	127,90	147,75
<b>1602 (poultry)</b>	<b>PREPARED/PRESERVED MEAT</b>	1.946.648	2.195.549	2.593.689	2.570.125	352,00	359,34
16023119	Meat or offal of turkeys "poultry", prepared or preserved, containing - >= 57% by weight of meat or offal of poultry	59.362	92.076	91.785	106.781	412,87	499,08
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	567.654	431.481	351,48	333,86
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	1.006.582	1.008.794	359,76	373,49
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	520.603	629.287	304,99	314,50
1602 other		713.325	697.411	407.066	393.781	379,93	384,76

Source: Extraction EUROSTAT, July 2022





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