AVEC

THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

Annual report

2023

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

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Introduction: dark clouds overhead

Since the start of the war in Ukraine, food security has once again become a major talking point, both in the EU and globally. AVEC's members are committed to maintaining sufficient production levels to supply both the EU and the global population with high quality, affordable chicken meat. In order to highlight the contribution our sector makes, and its commitment to responsible production, we launched the AVEC Sustainability Charter in December 2022.

The aim of the charter is to provide a clear roadmap setting out the key factors that will lead to an optimal balance between the three pillars of sustainability – environmental, social and economic – while ensuring the sector remains resilient in the future. The key to this is finding a *balance* between the pillars, rather than just focusing on one of them, which risks having a negative impact on the other two.

The AVEC Sustainability Charter features a list of ambitions that the sector will pursue in the following priority areas:

1. reduce the environmental impact of broiler meat production
2. making packaging material more sustainable
3. EU broiler sector will continue to improve animal welfare
4. use antibiotics "as little as possible but as much as necessary"

The introduction of the Sustainability Charter was very timely, as in February 2023 the European Food Safety Authority (EFSA) published its opinion on the welfare of broiler chickens on farms. This contained some very far-reaching recommendations, including a significant reduction in the daily growth rate for broilers – and a very large reduction in the maximum stocking density. If these recommendations were followed, it would lead to the cessation of 70% of the EU poultry meat production, with the remaining 30% being produced at such a high cost that only a small proportion of the EU population could afford it. The continent would become a net importer of poultry meat, leading to a dependence on third countries where the EU has no control over animal welfare and where emissions from poultry meat production are much higher than in Europe.

AVEC drew the attention of both EFSA and the EU Commission to the fact that, although it contained detailed recommendations, the reasoning and documentation behind these recommendations was characterised by a high degree of uncertainty. We also noted that we found the process of preparing the EFSA opinion to be insufficiently transparent, and that much greater involvement of scientific experts working in the sector had been needed.

On a positive note, we very much welcomed EFSA's recommendation that 'harmonised assessment methods and scoring systems should be implemented for assessing mortality on farm, wounds, carcass condemnation, and FPD [footpad dermatitis] in broilers at slaughter to monitor on-farm welfare of broilers in Europe'.

EFSA's recommendations are only one of the sources that the EU Commission will use to develop new animal welfare legislation. Therefore, AVEC has been very active in providing information about the implications that different scenarios in the breeding and rearing of broilers will have, and has called on the Commission to include all three pillars of sustainability – environmental, social and economic – in its policy proposals.

The new legislative proposal for animal welfare is due in autumn 2023.

Another dark cloud over the European poultry meat sector relates to imports from third countries. The competitiveness of our sector continues to decline due to rising feed and energy prices, and therefore the increase in imports is very worrying.

In the first few months of 2023, there was a massive increase in imports of Brazilian (+30%) and Thai (+35%) poultry meat products, following a record year for imports in 2022. Furthermore, the EU Commission has agreed on additional concessions of 180,000 tonnes in the Mercosur negotiations and 18,000 tonnes in the extension of the free trade agreement with Chile. These tariff quotas will be added to the existing volumes when the agreement is ratified and will further increase the pressure on EU producers.

And then there is the unlimited importation of poultry meat from Ukraine. The European poultry meat sector is united in condemning Russia's aggression in Ukraine. Our producers stand behind the Ukrainian people and fully support measures aimed at helping Ukrainian citizens cope with the consequences of this terrible war. While we support the need for collective EU action to assist Ukraine, we believe it is unfair that our sector should bear such a large share of the collective burden.

Therefore, AVEC sent a request to the EU Commission on 19 June 2023 requesting the imposition of an expedited safeguard relating to imports of poultry meat from Ukraine, as provided for in article 4 of the Regulation on autonomous trade measures.

The final dark cloud over European poultry meat production is highly pathogenic avian influenza (HPAI). The changing epidemiology of HPAI and its impact on poultry producers and their flocks has led to debates in the scientific, poultry and policy communities about the role of vaccination in combating this disease. AVEC has been an active participant in this debate.

It is important to note that vaccination won't solve the problem of avian influenza once and for all. It can be part of a strategy, but many other measures must also be taken. Each EU country has to carry out a risk assessment to find the best strategy for its territory.

The EU has published very strict rules defining a framework for how vaccination should be carried out in full compliance with World Organisation for Animal Health (WOAH) rules. This includes strict surveillance programmes to monitor the effectiveness of the strategy and to ensure that the virus doesn't circulate. This will be costly and must be seen as a measure for society as a whole – and as such the costs should not only be borne by poultry producers.

Based on recent experience, it is becoming more and more difficult to control HPAI without vaccination. However, should vaccination be introduced, it's crucial that the EU Commission, together with EU national authorities, works with international institutions such as WOAH and the third countries with which we trade in order to avoid trade barriers as a result of vaccination against HPAI.

There are dark clouds in the sky, but despite these the European poultry meat sector is a high-performing, progressive and sustainable sector which contributes significantly to a balanced and healthy diet for both Europe and the world. Furthermore, it is a forward-thinking and principled sector, which is constantly advancing sustainable development across areas including innovation, decision-making, management and stakeholder relationships, positively impacting the entire production chain. And we know that the sun shines behind the dark clouds, because European poultry meat is part of the solution when it comes to producing sustainable, healthy and affordable food for the EU's citizens.

Birthe Steenberg **Gert-Jan Oplaat**

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> "At a time when food security has re-emerged as a major preoccupation in the EU and globally following the war in Ukraine, AVEC's members are committed to maintaining sufficient levels of production to provide the EU and global population with high-quality and affordable broiler meat."

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 five employees:

- Secretary General, Birthe Steenberg
- Deputy Secretary General, Paul-Henri Lava
- Senior Policy Advisor, Nadia Khaldoune
- Project Manager, Federica Chiarella
- Communications Manager, Isabella Beck Jørgensen

Left to right: Federica Chiarella, Isabella Beck Jørgensen, Nadia Khaldoune, Paul-Henri Lava and Birthe Steenberg

The presidency and the board

At the AVEC General Assembly in Riga 2022, Gert-Jan Oplaat was elected as the new president of AVEC. In the Netherlands, he is the President of the Association of the Dutch Poultry Processing Industry (NEPLUVI). Gert-Jan Oplaat succeeded Paul Lopez from France, who had been president of the association for the previous eight years. Gert-Jan Oplaat is assisted by four vice-presidents:


Gert-Jan Oplaat

- Mario Veronesi – UNAITALIA – Italy
- Dariusz Goszczynski – KRD – Poland
- Franz-Josef Rothkötter – ZDG – Germany
- Lokin Zuloaga – AVIANZA – Spain


Mario Veronesi


Dariusz Goszczynski


Franz-Josef Rothkötter


Lokin Zuloaga

> "Ultimately, the call for sustainability should do justice to the P of Planet, the P of People, but also the P of Profit."

AVEC President Gert-Jan Oplaat

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.

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 sector and poultry trade in 16 EU Member States and in the UK.

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DENMARK	Stig Munck Larsen	Michael Juhl Jørgensen
FINLAND	Terhi Virtanen	Petri Toivola
FRANCE	Philippe Gélin	Yann Brice
GERMANY	Franz-Josef Rothkötter	Wolfgang Schleicher
HUNGARY	Dr Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
LATVIA	Anna Erliha	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 Šišić	Janez Rebec
SPAIN	Iokin Zuloaga	Jordi Montfort
SWEDEN	Maria Donis	Mats Hedlund
UNITED KINGDOM	Philip Wilkinson	Richard Griffiths

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. Wout Van Wolfswinkel from COB-K is the President of ELPHA. EPB is a member of ELPHA and promotes the interests of companies that are active in poultry breeding in the EU. Magnus Swalander from Aviagen is the President of EPB.

European Livestock Voice (ELV)

AVEC is part of the European Livestock Voice (ELV) – a multi-stakeholder group of 14 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) 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	
Dairy	Aquaculture	Rabbit	

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 and WTO.

AVEC's focuses 2022–2023

This section provides an overview of the main themes AVEC has worked on during 2022–2023. 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.


Chair, Harald Schliessnig

Animal welfare

The long-awaited EFSA opinions on the welfare of domestic birds transported in containers and the welfare of broilers on farm were published on 7 September 2022 and 21 February 2023 respectively.

As mandated by the European Commission, it was clear before their publication that the reports would focus only on the welfare of broilers, breeders and day-old chicks. AVEC had hoped that EFSA would reflect on the significant progress that has been made by the sector in relation to animal welfare since the publication of the EU Broiler Directive in 2007 and the EU Regulation on transport No 1/2005, but this was not the case.

Among the scientific opinions, and alongside numerous technical recommendations, one outcome is important to highlight at EU level: “The scientific panel of EFSA recommends substantially reducing the stocking density to meet the behavioural needs of broilers. A maximum stocking density of 11 kg/m2 for fast-growing broiler chickens is recommended to prevent the welfare consequences identified as highly relevant.”

If implemented, this one recommendation would reduce European poultry meat production to 30% of self-sufficient levels (as opposed to 113% today) and result in higher imports from third countries with lower welfare standards. AVEC’s members are entirely willing to continue improving animal welfare, but not to decimate their own production.

European poultry meat is part of the solution to producing high quality, healthy, sustainable food, and at the time this annual report was being prepared, the Commission’s impact assessment and proposed texts of the revised animal welfare legislation were still being awaited. We hope that the Commission will put forward a proposal that ensures the best ‘balance point’ between the three pillars of sustainability so that poultry meat production in Europe will continue to be resilient.

Focus on avian influenza. Are gulls taking over?

Between 3 December 2022 and 1 March 2023, highly pathogenic avian influenza (HPAI) A(H5N1) virus was reported in 522 domestic and 1,138 wild birds across 24 countries in Europe. An unexpected number of HPAI virus detections were observed in seabirds, mainly in gull species and particularly in black-headed gulls. Moreover, genetic analyses indicate that the virus persisted in Europe in residential wild birds during and after the summer months.

Several mutations associated with increased zoonotic potential were detected. The risk of poultry becoming infected with HPAI due to the virus circulating in black-headed gulls and other gull species may increase during the coming months as breeding bird colonies move inland, potentially overlapping with poultry production areas. Worldwide, HPAI continued to spread southwards in the Americas from Mexico to southern Chile.

Reporting of HPAI also continued in mammals. In Peru, a mass mortality event of sea lions was observed in January and February 2023. And finally, the first case in backyard poultry was reported in Brazil in June.

Since October 2022, six cases of A(H5N1) have been reported in humans: two in Cambodia, two in China, one in Ecuador, and one in Vietnam. Two human infections of A(H5N6) have also been reported in China. In the EU/EEA, the risk of infection is assessed as being low for the general population, and low to moderate for occupationally or otherwise exposed people.

To vaccinate or not to vaccinate

In February 2023 the European Commission published a Delegated Regulation regarding rules for the use of veterinary medicinal products for preventing and controlling listed diseases including HPAI. Vaccination trials targeting different species have since commenced in several member states.

Although not all issues relating to trade have been resolved, AVEC supports vaccination as an additional tool to better prevent and control the risk of HPAI infection in poultry. And, with the first results from the trials having been successful, there is no doubt that some EU countries, such as France, will start vaccinating in autumn 2023.

At the international level, a milestone was reached at the WOAH general session in Paris in May 2023 with the adoption of Resolution 28, stating that "member states should recognise compliant use of vaccination without negative consequences on trade".

AVEC remains actively involved into the discussions between member states, EU institutions and trade partners from third countries, with the goal of finding a suitable and sustainable solution to the fight against avian influenza and to keep the trade flows going.

> "We believe it is crucial to discuss vaccination and favour the its use, providing negative consequences on exports to third countries can be prevented."

AVEC working group on food safety and food quality

Management of contaminants

*Interim Chair,
Nada Brahim*

Following the success of the webinar series on contaminants in 2021, the FSFQ working group decided to run a further series of webinars in 2023. This began with a webinar on Campylobacter, which is a topic of great interest to our sector, especially with a new regulatory threshold already set for 2025 which represents an important challenge for our businesses. AVEC is strongly committed to supporting its members to identify tools to improve control of Campylobacter in poultry farming and slaughterhouses.

The FSFQ working group has also been paying particular attention to the issue of Mineral Oil Saturated Hydrocarbons (MOSH) and Mineral Oil Aromatic Hydrocarbons (MOAH) contamination in the run-up to the expected EFSA opinion in September 2023.

Nitrites and nitrates

On 15 June 2023, the Commission proposed a draft delegated act to lower the maximum quantities of nitrates and nitrites authorised as additives in a range of food products, including poultry meat. This proposal followed on from an EFSA opinion highlighting that nitrates and nitrites contribute to the formation of a group of compounds known as nitrosamines, some of which are carcinogenic. We believe that food safety should always be at the forefront of the political debate and support the Commission's initiative to reduce the quantities of nitrates and nitrites used in food. AVEC is committed to working collaboratively with both its members and other livestock associations to achieve this next step.

Revision of the marketing standards regulation

Discussions around the revision of the marketing standards regulation continued this year within the FSFQ working group, following receipt of the proposed EU draft texts. AVEC welcomes the opportunity to revise EU marketing standards for certain agri-food products, and thanks the European Commission for this initiative. However, our members feel that not all technological changes and new production methods – specifically in terms of water content – have been considered in these revised texts.

Since their establishment in the 1990s, the marketing standards have been a vital tool in maintaining and developing alternative poultry rearing systems. AVEC calls on the European Commission to maintain ambitious marketing standards that protect both consumers and our virtuous farming model.

Within the marketing standards subgroup, a common position was reached on the need to implement transparent mandatory labelling of origin for all products containing poultry meat, across all distribution channels, in order to keep in step with the objectives of the Farm to Fork Strategy.

> “Our highest priority is producing food that consumers can trust and upholding food safety and food quality standards. AVEC is continuously engaging with the European Commission to develop strategies for reducing Campylobacter and Salmonella contamination and to encourage an increased focus on making kitchen hygiene information available to consumers.”

AVEC working group on sustainable production

As the end of the Commission's five-year mandate approaches, a significant number of policies on sustainability are being discussed in order to finalise the European Green Deal, the flagship initiative of the von der Leyen Commission. The Working group on sustainable production has been reviewing these policies in order to establish the position of the poultry meat sector and defend its interests.

Chair, Saulius Petkevicius

Feed

Feed is a major contributor to the environmental impact of poultry meat production, and the group has dedicated an important part of its work to looking at ways of improving feed sustainability. Higher bird feed efficiency (feed conversion ratio) has been identified as key to lowering environmental impact. The group invited scientists and sector representatives to discuss the environmental impact of different feed types. They highlighted the lower impact of United States soy versus Brazilian soy due to a lower "land use change" element, along with the lower impact of United States soy versus EU-grown rapeseed or sunflower seed. The group also discussed the impact of processed animal proteins (PAPs), although a combination of the higher cost and EU restrictions (with no option to use poultry PAPs) limits their use. Discussions focused on the complexity of this question and the need to work in close collaboration with feed producers and the rest of the production chain to achieve improvements in this area. The discussions will also shape our inputs into the new EU protein strategy that is expected to be released by the Commission at the beginning of 2024.

New deforestation legislation

EU authorities have now finalised the new regulation on deforestation-free products. The working group collaborated closely with FEFAC, the European Feed Manufacturers' Federation, to assess the impact of new requirements for a completely deforestation-free supply chain with full traceability.

Increases in the costs of soy are likely, but it is hard to predict the extent of these. More positively, the due diligence requirement should apply upwards to compound fee producers, but not further down the chain. The legislation will come into force at the beginning of 2025 and there are still a lot of questions to be answered before then.

Packaging

The Commission has proposed a new regulation on packaging and packaging waste, with three core objectives:

- reduce the current production of packaging waste
- promote cost-effective circular economy principles across the industry
- increase the use of recycled materials in packaging

AVEC supports the objectives of the regulation, but it is also important to highlight the specific requirements of the meat sector when considering packaging. Food safety must remain the priority, and the noble objectives of the new regulation should not harm consumers. Reflecting this, a special working group has been created that brings together experts from CLITRAVI (meat processors), UECBV (red meat) and AVEC (poultry meat), to speak with one voice and make proposals to the EU authorities on this legislation. Final adoption of the legislation is expected in the second half of 2023.

Revision of the Industrial Emissions Directive

Revision of the Industrial Emissions Directive (IED) will include changes to the thresholds at which farms have to comply with the Directive. Under current rules, the farms have to observe strict emissions limits (to water, soil and air) and need to obtain a permit to operate. The new threshold is likely to lead to significant increases in costs, and a greater administrative burden for poultry farmers who are not currently within the scope of the legislation, as they are below the present threshold of 40,000 places for poultry.

AVEC is strongly arguing to maintain the status quo and avoid new thresholds that would have very negative consequences, especially for turkey and duck producers. At the beginning of July, the EU Parliament voted in favour of maintaining current thresholds. A final decision is expected in the second half of 2024, following trilogues negotiations.

BREF on slaughterhouses and by-products

In parallel, a group of AVEC experts has been working on the revision of the BREF document on slaughterhouses and animal by-products resulting from the IED Directive. The group has participated in consultation meetings with the Commission, member states and NGOs that aim to agree the "best available technique (BAT) conclusions". The final version of the document was discussed in May and resulted in a number of differing views between countries, NGOs and industry. The Commission will publish its final conclusions on defining the limits of emissions to the environment (BAT conclusions) for our sector in the second half of 2023.

A surge of new legislation

The working group discussed many other pieces of legislation, including the Green Claims Directive (establishing rules on the labelling of environmental claims); the EU taxonomy for sustainable activities; and the framework for sustainable food systems (FSFS) (rules that aim to define a framework for sustainable food production). This workload illustrates the surge of new rules that producers will be faced with in the coming years – either directly or indirectly – and the importance of communicating closely with policy makers to ensure our voice is heard.

It is also important to put forward our vision of sustainability to policy makers, who are often disconnected from the day-to-day business realities of our sector, and who do not appreciate the tremendous results that the sector has already achieved on sustainability. This is why AVEC published its Sustainability Charter in November 2022: to demonstrate that our sector is committed to a sustainable future and that **EU poultry meat is part of the solution**.

AVEC Sustainability Charter

The AVEC Sustainability Charter sets out the sector's response to the EU Green Deal. It defines our vision for guaranteeing the resilience of the sector and working to deliver a more sustainable EU poultry meat sector in the future.

The Charter aims to provide a clear roadmap on the key attributes that will deliver the best balance between the three pillars of sustainability (environmental, social and economic). It takes the form of a list of ambitions put forward by the sector on the following priority areas: environmental impact, packaging, animal welfare, and the use of antibiotics. It is designed to evolve over time and amongst AVEC's members who are invited to adapt the Charter to their national strategies for sustainability. A first update of the Charter will be presented at the end of 2024 at an event that sets out concrete examples of actions that have been implemented by our members on the ground.

Over the past year, the working group has focused on ways of making the poultry meat sector even more sustainable. The Charter demonstrates our commitments, but it is also important to make sure that policy makers understand the constraints we are operating under. This is why the group will continue to maintain close contact with EU authorities, and we hope that more experts from companies and associations will participate in our work as we take it forward.

> "The AVEC Sustainability Charter provides a clear roadmap on the key attributes leading to the best balance between the three pillars of sustainability and guaranteeing the resilience of the sector in the future."

AVEC working group on trade

AVEC defends both the offensive and defensive trade interests of the EU poultry meat sector. At a time when the poultry industry is facing the challenge of new EU regulations arising from the Farm to Fork Strategy – particularly relating to animal welfare and the fight against climate change – we are also experiencing increased competition from third countries that are producing poultry meat with lower standards.

Chair, Stig Munck Larsen

The Ukrainian dilemma and need for a fair trade balance

Russia's war in Ukraine and the occupation of Ukrainian territory is a terrible action that requires a firm response, including support for Ukrainian citizens and society. AVEC and its members supported the EU's decision last June to liberalise Ukrainian exports to the EU for a period of a year. Due to the need to continue supporting the Ukrainian economy during the war, in June 2023 the EU agreed to prolong the trade liberalisation agreement for another year – until June 2024. While still backing the EU's stance, AVEC has serious concerns about this trade development and has therefore advocated for a fast-track procedure in the safeguard provision in the agreement to address the significant increase in imports of poultry meat from Ukraine.

The EU poultry meat sector has experienced a range of unforeseen consequences resulting from this trade liberalisation since its introduction in June 2022. Before the liberalisation, Ukraine was subject to a yearly duty-free poultry meat export quota of 90,000 tonnes (net weight) to the EU. The export of breast meat increased significantly with the liberalisation, reaching almost 220,000 tonnes (carcass weight) in the 12 months from June 2022 to May 2023.

This increase in imports has serious direct and indirect impacts on the EU poultry industry. It increases the total volume of poultry meat in the market, pushing down prices while we are in an increasing cost environment due to inflation affecting feed and energy prices, as well as salaries. The first destinations for imports are the countries that border Ukraine, as well as the Netherlands, where cutting and processing takes place for further distribution to EU markets. When combined with decreased EU exports due to HPAI outbreaks, these increased imports into the EU have created a greater supply of cheaper poultry meat that does not reflect the cost of local production.

AVEC strongly urges the EU Commission to urgently initiate a fast-track safeguard investigation against increased imported poultry meat at low prices from Ukraine, and to reimpose import quotas at a balanced level that does not jeopardise the EU poultry sector.

Increased third country imports and the EU's approach to sustainability

The vast majority of poultry meat imports from third countries still come from exporters in Brazil and Thailand, the only two major global producers that have not been affected by avian influenza in commercial flocks.

Imports increased again in 2022 and 2023 following the disruptions caused by COVID-19 and its impact on the food services sector. Setting aside the drop in imports from the UK, imports from other third countries have shown double-digit growth, and this could accelerate further if the Mercosur trade agreement is implemented and imports from Ukraine are not limited.

AVEC is concerned by the general trend of import developments, not least in light of the upcoming wave of animal welfare and climate regulations, which will further increase the standard of European poultry, along with the cost of production. If these additional requirements are not applicable to imported poultry meat, production in the EU will be displaced by imported poultry meat that is produced to lower standards. In order to meet the aims of EU policy on sustainable production, AVEC considers it essential that all poultry meat consumed in the EU is produced **under the same set of rules relating to animal welfare and the climate.**

WTO/GATT trade rules state that a country or region can impose more restrictive rules on trading partners if these are necessary to protect human, animal or plant life or health, provided that 'such measures are not applied in a manner which would constitute a means of arbitrary or unjustifiable discrimination between countries where the same conditions prevail, or a disguised restriction on international trade'. AVEC is aware that this area represents uncharted waters from a legal standpoint, but is of the opinion that it should be legally justified to apply GATT Article 20 general exceptions to trading partners as long as they are not disproportionately disadvantaged, and a reasonable transition period is provided.

South Africa: still blocking EU poultry meat exports

EU poultry meat exports are still caught in a political dispute with South Africa relating to trade and market access for various sectors. Despite many EU countries being free of avian influenza, South Africa has still not lifted its HPAI ban on EU exports from many countries. This is consistent with their policy to impose unjustified safeguard and anti-dumping measures on poultry meat imports from several EU countries. Notwithstanding the comprehensive challenges to local poultry production (HPAI outbreaks, unstable energy markets, transportation challenges, inflation) EU producers are ready to provide affordable poultry meat to South African consumers at prices that do not outcompete the local producers.

Brexit – Border Target Operating Model

After many years of waiting and a lack of clarity about trade conditions when exporting from the EU, the UK finally unveiled its new customs clearance system for goods crossing from the EU to Great Britain. The Border Target Operating Model will come into effect from the end of October 2023, with a requirement that products are accompanied by a health certificate, and imports being subject to random physical risk-based controls.

There is a need for further clarification regarding the new model, and AVEC is also concerned that the UK side may have insufficient veterinarians at border and customs points to carry out controls and physical checks on consignments. It could be a serious threat to trade if staff shortages result in trucks with fresh meat having to queue up for inspection.

AVEC's involvement in European projects

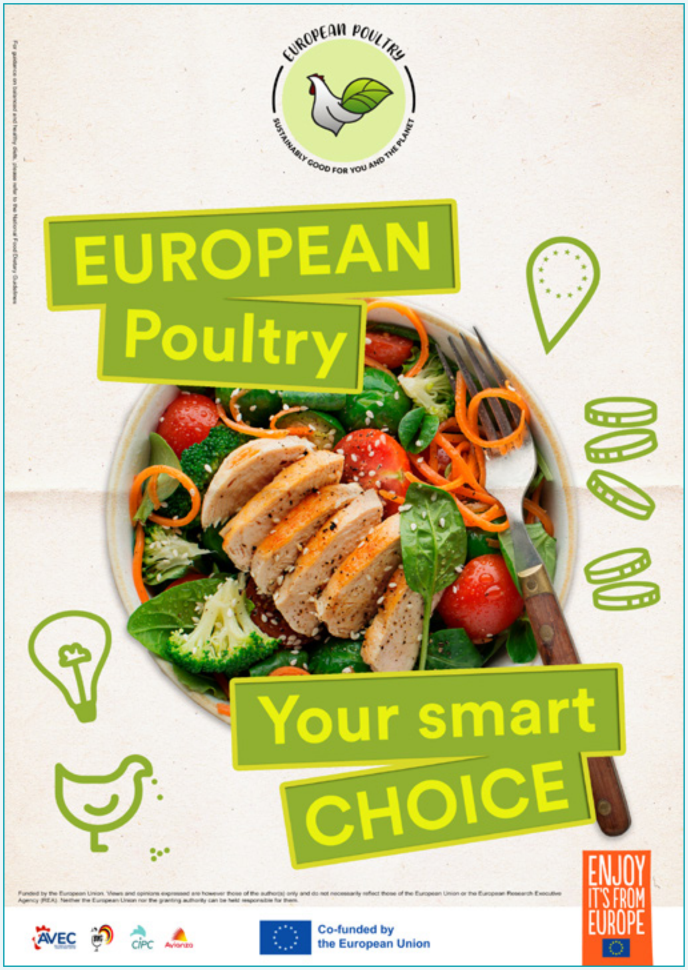
EU promotional project on sustainable poultry production

'European poultry: good for you and the planet' is the strapline of a two-year promotion programme initiated by AVEC, together with three national poultry associations: BVG in Germany, CIPC (France) and AVIANZA (Spain). Started in 2022 and with a budget of €3.2 million (80% funded by the European Research Executive Agency, European Commission), the SUST EU POULTRY programme 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.

Sharing the same branding and key messages, each of the three partners developed 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 being 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.

On 30 November 2022, AVEC hosted the event 'How to champion a sustainable meat production', targeting professionals and key opinion leaders from the European bubble with the main objective of informing them about sustainable production, animal welfare and consumer practices. The event, which took place in Brussels, was also the perfect occasion to present and hand out the AVEC Sustainability Charter.

Discover more about this initiative on the website www.eu-poultry.eu



The MOZART Project

Having managed two promotional programmes, AVEC took on a new challenge and joined the MOZART Project (Morphing Computerized mats with Embodied Sensing and Artificial Intelligence). This four-year Horizon Project (October 2022 – September 2026) is funded by the European Commission within the call 'Research and Innovation – Artificial Intelligence, Data and Robotics for the Green Deal'. Coordinated by IT University of Copenhagen (ITU), it gathers eight different stakeholders from five different Member States: four universities and research centres, a standardisation entity, a company, a communication agency, and a business association – AVEC.

MOZART aims to advance the state-of-the-art in the robotic handling of soft and heterogenous objects, which is currently limited to simple pick-and-place operations.

The handling of fragile and fresh food items still depends on manual processes that are tiring for operators and raise issues about product quality, food waste and hygiene. By taking chicken meat and fish as case studies, the MOZART project is developing a new approach, based on novel reconfigurable surfaces embedded with soft sensors and controlled by AI-powered learning tools: Autonomous Manipulation using Morphing Modular Mats (AUTOMATs).

An integrative social sciences and humanities study anticipates the challenges of deploying AUTOMATs in actual production environments, allowing operators to move to better jobs while monitoring and ensuring that the technological developments are socially, environmentally, and economically sustainable.

As part of this four-year project, AVEC will play an essential role in the communication, dissemination and exploitation of MOZART's activities, outcomes and results.

Discover more on the MOZART website: https://mozart-robotics.eu/

AVEC working group on turkey

Overview of the world poultry market in 2022


Chair, Yann Brice

In 2022, agricultural production in Europe and around the world was severely impacted by a number of external factors, including the vagaries of the weather, global conflicts, rising costs and charges, and epizootic diseases such as avian influenza. Turkey has been particularly affected by two of these: the war in Ukraine and avian influenza.

Animal feed and energy costs soared in 2022. Turkey was the first poultry sector to suffer due to lower competitiveness compared to chicken: its rearing time, consumption index and sensitivity to influenza viruses had an immediate impact on production volumes, which fell by 7.2% at a European level. Italy and France were the EU countries with the biggest production losses, with a decrease of over 120,000 tonnes out of a total EU production of 1.78 million tonnes. On the consumption side, the annual erosion seen in recent years has not stopped. Volumes are falling as a result of a decrease in consumption. Nevertheless, the benefits of turkey meat are undeniable, and despite exports having dropped by 14% in 2022, it is necessary to maintain our production to preserve the diversity of poultry products on consumers' tables, both in the EU and globally.

Risks and opportunities for the turkey sector

The risks to turkey production are not negligible. Poultry meat is popular with all consumers, whatever their origin or religion, but unfortunately turkey's main competitor remains its closest cousin, chicken, which is constantly expanding in all markets. The two meats are very similar, but different, and if turkey producers want to tackle decreasing consumption it is essential to differentiate turkey from chicken. We must not confine turkey to a festive product, but instead highlight its strengths and differences in order to put it back on our plates every day. Let's innovate and change our eating habits.

HPAI and vaccination: a solution?

The issue of influenza vaccination is a complex one. It is not the solution, but a complementary tool for combating the disease. Today's thinking is not the same as it was in the past because the situation has changed. The disease is now present everywhere in the world, and even if Brazil has still managed to avoid contamination in commercial farms, it has reshuffled the cards in terms of trade flows. France will start vaccinating ducks from autumn 2023 with the aim of actively fighting the disease. This is a pioneering, full-scale test that will undoubtedly reassure international trade about our seriousness and expertise in this area.

EFSA's upcoming mandate and its approach to animal welfare

The EFSA opinion on broiler welfare, which was published on 21 February 2023, excluded social, economic and environmental criteria. In this sense, it is disconnected from the reality of the field and of the European consumption. AVEC has reacted quickly to balance out the recommendations put forward, both scientifically and economically. As for turkey, we are already organising ourselves to gather comprehensive scientific data to address the upcoming mandate EFSA will receive from the Commission as regards a future opinion on the welfare of turkeys on farm. Let's promote the work achieved in the AVEC Turkey Management Guide approved by the Board last year.

Statistics

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

	2018	2019	2019	2020	2021	2022
	EU 28	EU 28	EU 27	EU 27	EU 27	EU 27
Gross indigenous production	15,260	15,635	13,549	13,673	13,404	13,177
Export of meat	1,593	1,665	2,499	2,345	2,134	2,087
Import of meat	802	850	848	710	711	917
Consumption	14,462	14,813	11,891	12,034	11,872	12,005
Consumption per capita, kg	24.8	25.3	23.4	23.7	23.4	23.4
Self-sufficiency, %	105.5	105.5	113.9	113.6	112.1	109.8

Note: Partial provisional or estimated.
Source: EU-Commission, so the gross indigenous production is different to table No. 4.

“The poultry meat sector follows the ‘One Health’ approach to improving health and welfare through collaboration and communication between human and veterinary medicine.”

Production (updated 2022)

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

	2017	2018	2019	2020	2021	2022
Austria	129	132	134	144	150	150
Belgium / Luxembourg	463	470	417	448	449	437
Denmark	156	159	169	165	162	160
Finland	130	135	140	142	147	152
France	1,857	1,788	1,790	1,733	1,684	1,554
Germany	1,802	1,818	1,824	1,807	1,754	1,752
Greece	246	220	230	240	270	270
Ireland	142	146	154	166	163	165
Italy	1,354	1,314	1,324	1,390	1,374	1,237
Netherlands	1,096	1,038	1,036	996	869	863
Portugal	337	342	348	349	359	364
Spain	1,454	1,427	1,392	1,420	1,374	1,374
Sweden	157	155	160	172	182	187
Bulgaria	107	111	109	102	102	102
Cyprus	25	26	27	27	27	27
Czech Republic	183	193	196	200	200	191
Estonia	20	19	20	15	15	15
Hungary	602	669	688	666	719	712
Croatia	66	64	68	70	71	75
Latvia	33	33	35	35	36	34
Lithuania	134	108	100	101	87	87
Poland	2,511	2,597	2,863	2,981	2,762	2,963
Romania	436	480	507	487	452	460
Slovakia	71	75	71	58	56	56
Slovenia	68	69	70	73	72	75
EU 27	**13,583**	**13,590**	**13,876**	**13,989**	**13,540**	**13,465**
United Kingdom	1,841	1,940	1,888	1,993	1,995	2,005
EU 28	**15,424**	**15,530**	**15,763**	**.**	**.**	**.**

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

Production (updated 2022)

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

	2017	2018	2019	2020	2021	2022
Argentina	2,116	2,068	2,306	2,316	2,295	2,278
Brazil	13,612	13,289	13,936	14,424	14,980	14,818
Chile	702	761	768	767	751	792
China	19,493	20,371	20,766	21,279	21,449	21,771
India	3,804	4,102	4,223	3,597	3,767	4,301
Japan	1,575	1,599	1,632	1,668	1,668	1,642
Mexico	3,242	3,369	3,507	3,610	3,693	3,705
Russia	4,558	4,563	4,631	4,617	4,541	4,589
Saudi Arabia	655	714	805	904	913	934
Switzerland	95	102	103	107	112	115
South Africa	1,675	1,758	1,823	1,889	1,932	1,973
Turkey	2,253	2,300	2,270	2,274	2,380	2,347
Ukraine	1,015	1,014	1,132	1,200	1,162	1,094
USA	21,409	21,783	22,341	22,828	22,882	22,797
World Production	**123,873**	**127,413**	**131,005**	**132,425**	**133,997**	**135,929**

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

"In our view, it is of utmost importance that the road towards more sustainable broiler production does not compromise the productivity and the efficiency of the sector. A world which will number 9 billion people in 2050 needs sufficient supply of quality broiler meat at an affordable price."

Trade

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

	2017	2018	2019	2020	2021	2022	2022 from third countries – EU 27
Poultry Meat 1)							
Austria	105	103	108	96	104	114	0
Belgium / Luxembourg	288	286	297	279	304	300	14
Bulgaria	111	110	112	100	93	94	1
Croatia	19	21	22	18	21	24	2
Cyprus	11	12	12	10	12	13	0
Czech Republic	109	115	110	113	104	123	0
Denmark	65	73	79	75	63	63	1
Estonia	21	27	22	21	22	23	0
Finland	10	9	8	8	7	7	0
France	442	457	458	437	524	551	63
Germany	694	721	721	679	695	658	14
Greece	80	82	84	72	82	85	0
Hungary	54	54	68	78	71	84	19
Ireland	82	88	77	67	65	87	33
Italy	68	69	67	68	74	118	1
Latvia	40	43	44	45	44	38	0
Lithuania	39	39	42	47	46	42	0
Malta	6	6	6	6	5	5	0
Netherlands	491	573	588	570	696	833	178
Poland	59	79	89	63	78	69	20
Portugal	68	74	73	67	67	73	1
Romania	143	137	122	134	124	117	3
Slovakia	57	83	102	77	59	80	0
Slovenia	18	20	20	18	17	20	0
Spain	182	169	151	137	138	159	27
Sweden	58	55	58	53	57	63	0
United Kingdom	429	445	434	.	.	.	.
EU 28 from third countries	**161**	**234**	**215**	**.**	**.**	**.**	**.**
EU 27 from third countries	**.**	**.**	**468**	**392**	**375**	**382**	**379**
Salted meat 2)							
Germany	39	28	30	31	35	39	23
Netherlands	141	121	154	134	142	159	145
United Kingdom	45	36	45	.	.	.	.
EU 28 from third countries	**211**	**176**	**204**	**.**	**.**	**.**	**.**
EU 27 from third countries	**.**	**.**	**177**	**157**	**160**	**160**	**170**
Preparations of poultry 3)							
EU 28 from third countries	**389**	**338**	**338**	**.**	**.**	**.**	**.**
EU 27 from third countries	**.**	**.**	**178**	**155**	**146**	**194**	**190**

Note: 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 EU countries of poultry meat ('000 tonnes[1])

	2017	2018	2019	2020	2021	2022	2022 to third countries – EU 27
Austria	61	63	65	67	72	69	12
Belgium / Luxembourg	578	572	511	517	544	463	130
Bulgaria	44	46	43	32	35	38	3
Croatia	8	9	8	8	11	11	7
Cyprus	1	1	1	1	1	1	1
Czech Republic	24	23	18	16	19	28	1
Denmark	86	83	88	81	69	84	25
Estonia	7	7	9	8	9	8	0
Finland	13	14	14	14	13	10	2
France	425	402	362	326	360	333	125
Germany	482	451	475	415	427	481	45
Greece	29	33	35	34	42	44	15
Hungary	183	213	235	204	244	218	45
Ireland	90	87	107	103	63	96	61
Italy	165	158	167	163	174	129	43
Latvia	18	17	16	15	16	15	4
Lithuania	55	51	46	47	41	38	14
Malta	0	0	0	0	0	0	0
Netherlands	1,437	1,495	1,583	1,455	1,320	1,369	435
Poland	1,156	1,325	1,461	1,495	1,482	1,586	554
Portugal	42	34	27	25	37	36	12
Romania	59	66	75	75	79	82	22
Slovakia	21	37	37	22	22	29	2
Slovenia	22	23	23	21	25	24	7
Spain	216	245	241	215	246	211	69
Sweden	74	76	84	82	81	91	9
United Kingdom	335	361	383	.	.	.	.
EU 28 to third countries	**1,483**	**1,578**	**1,686**	**.**	**.**	**.**	**.**
which were							
Chicken	1,317	1,419	1,526	.	.	.	.
Turkey	140	127	133	.	.	.	.
EU 27 to third countries	**.**	**.**	**2,167**	**2,029**	**1,809**	**1,635**	**1,633**
Preparations of poultry [2)]							
EU 28 to third countries	**41**	**44**	**54**	**.**	**.**	**.**	**.**
EU 27 to third countries	**.**	**.**	**245**	**247**	**246**	**262**	**262**

Note: 1) Without preparations, livers and salted meat. 2) tariff items 1602 31 .. 1602 32 .. and 1602 39 .. –
Source: MEG to Eurostat and national statistics.

Trade

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

	2017	2018	2019	2020	2021	2022
Total imports of poultry meat						
Switzerland	45	45	46	43	46	48
Imports of broiler meat						
Angola	267	317	266	213	264	345
China	311	342	580	999	788	645
Hong Kong	390	.	.	.	.	.
Iraq	444	527	493	468	375	.
Japan	1,056	1,074	1,076	1,005	1,077	1,105
Russian Federation	225	225	224	200	220	.
Saudi Arabia	711	629	601	618	615	615
United Arab. Emirates	439	579	601	618	520	700
Exports of broiler meat						
Argentina	178	125	155	155	183	190
Belarus	150	168	174	190	184	.
Brazil	3,835	3,675	3,811	3,875	4,225	4,445
Chile	.	111	131	136	133	.
China	436	447	428	388	457	530
Thailand	757	826	881	941	907	1035
Turkey	357	418	408	442	563	860
Ukraine	263	317	409	428	458	420
USA	3,137	3,244	3,259	3,376	3,356	3,317

Sources: MEG to USDA and national data.

“Appropriate use of antimicrobials is the key to mitigating the risk of widespread antimicrobial resistance while still ensuring that animals are treated when sick. The administration of antimicrobials is complementary to good farm-management practice, including strict biosecurity policies and properly designed vaccination programmes.”

Consumption

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

	2017	2018	2019	2020	2021	2022
Austria	20.8	21.0	20.9	21.0	21.5	21.7
Czech Republic	23.5	24.0	25.0	25.5	25.3	26.0
Denmark	23.5	25.6	27.6	27.3	26.7	25.0
Finland	23.1	23.6	24.3	24.4	25.5	26.0
France	27.6	29.5	28.3	28.4	28.4	28.2
Germany	20.8	22.2	22.0	22.3	22.1	21.4
Greece	18.9	19.0	20.2	20.0	21.0	21.0
Hungary	32.0	32.5	32.9	33.0	33.5	34.0
Ireland	34.0	36.0	35.0	35.0	36.0	.
Italy	20.7	20.5	20.3	21.7	21.5	20.8
Latvia	22.5	.	23.5	25.0	24.5	.
Lithuania	24.0	24.5	26.0	26.0	27.0	.
Netherlands	22.1	22.5	22.9	22.1	22.0	.
Poland	27.6	30.0	31.4	32.7	27.8	28.0
Portugal	35.3	37.1	28.4	38.0	37.8	38.7
Slovakia	21.0	20.5	22.0	21.5	20.0	.
Spain	30.5	30.0	29.5	31.1	29.9	28.0
Sweden	23.3	22.2	22.4	21.8	23.1	23.1
EU 28	**23.7**	**24.8**	**25.3**	**.**	**.**	**.**
EU 27	**.**	**.**	**23.4**	**23.7**	**23.4**	**23.4**
Switzerland	17.8	18.4	18.4	18.4	19.2	19.4
United Kingdom	28.9	29.7	29.8	.	.	.

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

Consumption

8. Self-sufficiency in poultry meat (%)

	2017	2018	2019	2020	2021	2022
Austria	70	71	72	77	78	80
Czech Republic	68	67	68	67	70	68
Finland	95	98	96	98	98	98
France	99	96	89	88	87	81
Germany	105	99	100	97	96	97
Greece	75	76	80	82	82	82
Hungary	127	130	132	123	129	125
Ireland	93	89	98	102	101	103
Italy	108	107	108	107	108	100
Latvia	70	.	62	61	63	65
Lithuania	115	111	103	100	94	96
Netherlands	186	180	161	160	158	.
Poland	240	228	249	250	223	283
Slovakia	70	.	.	.	.	.
Spain	102	105	107	106	109	104
Sweden	105	115	116	.	.	.
EU 27	**.**	**.**	**114**	**114**	**112**	**110**
United Kingdom	95	96	97	.	.	.
EU 28	**105**	**106**	**106**	**.**	**.**	**.**

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

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

	2017	2018	2019	2020	2021	2022
Austria	110	114	117	118	121	125
Belgium / Luxembourg	455	462	440	441	448	450
Bulgaria	87	87	89	87	91	90
Cyprus	25	25	27	27	27	27
Czech Republic	165	170	174	177	179	170
Denmark	154	157	167	164	162	160
Estonia	20	19	20	22	23	24
Finland	122	127	132	135	139	143
France	1,163	1,185	1,187	1,179	1,177	1,159
Germany	1,300	1,345	1,330	1,370	1,380	1,390
Greece	151	185	185	185	257	282
Hungary	409	414	436	462	479	479
Ireland	180	190	205	210	200	200
Italy	1,034	1,001	1,015	1,100	1,067	1,015
Croatia	67	69	70	71	59	61
Latvia	33	33	35	35	35	35
Lithuania	126	103	97	97	85	85
Malta	4	4	4	4	4	4
Netherlands	999	1,003	1,001	961	830	825
Poland	2,055	2,115	2,207	2,243	2,287	2,503
Portugal	287	289	294	293	300	304
Romania	388	415	415	400	420	420
Slovakia	80	80	80	80	81	86
Slovenia	63	64	64	67	67	66
Spain	1,250	1,191	1,151	1,180	1,140	1,145
Sweden	148	150	154	167	177	182
EU 27	**10,874**	**10,997**	**11,096**	**11,275**	**11,233**	**11,430**
United Kingdom	1,630	1,750	1,726	1,779	1,841	1,825
EU 28	**12,539**	**12,782**	**12,892**	**.**	**.**	**.**
Argentina	2,150	2,068	2,171	2,190	2,290	2,320
Brazil	13,612	13,555	13,690	13,880	14,500	14,250
China	11,600	11,700	13,750	14,600	14,700	14,300
India	3,767	4,062	4,344	4,473	3,670	.
Indonesia	3,176	3,838	3,929	3,642	3,844	.
Iran	2,182	2,231	2,332	2,430	1,983	.
Mexico	3,400	3,485	3,600	3,725	3,815	3,940
Russia	4,542	4,543	4,606	4,577	4,725	.
South-Africa	1,335	1,407	1,395	1,537	1,570	1,577
Thailand	2,990	3,170	3,300	3,250	3,220	3,300
USA	18,938	19,361	19,941	20,255	20,391	21,005
World	**111,583**	**114,613**	**117,533**	**120,461**	**121,588**	**122,318**

Notes: Mainly provisional or estimated. Partly contradictory towards 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)

	2017	2018	2019	2020	2021	2022
Austria	14.5	14.9	15.0	15.1	15.4	15.5
France	19.0	19.5	20.1	20.7	21.6	22.6
Germany	13.3	14.3	14.4	14.9	15.3	15.0
Italy	.	.	.	.	.	.
Netherlands	20.4	20.8	21.4	20.6	20.4	.
Portugal	.	.	.	.	.	.
EU 28	**19.2**	**20.2**	**20.8**	**.**	**.**	**.**
United Kingdom	.	.	.	.	.	.
EU 27	**.**	**.**	**20.0**	**20.3**	**20.4**	**20.3**
Third Countries						
Argentina	44.7	46.3	45.1	45.7	47.1	.
Brazil	47.0	46.2	46.2	47.0	48.0	45.6
China	8.1	8.1	9.7	10.4	10.3	9.9
India	2.8	3.0	3.2	2.8	.	.
Japan	21.1	21.9	22.2	22.0	22.9	23.2
Mexico	33.6	34.7	35.7	36.2	37.3	38.0
South Africa	31.4	32.5	31.2	32.6	31.8	31.6
USA	48.7	49.5	50.8	50.6	50.9	52.3

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

“AVEC and its members believe we are ALL part of the solution. Political decisions should strive to achieve the best balance between the three pillars of sustainability: economic, social, and environmental.”

Turkey

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

	2017	2018	2019	2020	2021	2022
Austria	18	18	16	18	20	19
Belgium / Luxembourg	8	7	8	7	7	7
Bulgaria	0	0	0	0	0	0
Croatia	12	14	15	17	17	18
Cyprus	0	0	0	0	0	0
Czech Republic	7	10	10	10	10	10
Denmark	1	1	1	1	1	1
Finland	8	8	8	6	9	9
France	369	338	339	328	305	252
Germany	387	360	388	390	361	335
Greece	3	3	3	3	3	3
Hungary	97	98	96	100	95	98
Ireland	25	27	29	31	33	34
Italy	309	301	301	313	298	215
Malta	0	0	0	0	0	0
Netherlands	28	28	.	.	.	.
Poland	376	384	408	392	368	364
Portugal	40	42	44	47	49	50
Romania	10	14	15	15	15	20
Slovakia	1	1	1	1	1	1
Slovenia	5	5	6	6	8	5
Spain	200	233	236	235	230	225
Sweden	5	5	5	5	5	5
EU 27	**1,907**	**1,896**	**1,956**	**1,954**	**1,863**	**1,698**
United Kingdom	147	157	175	174	129	.
EU 28	**2,054**	**2,052**	**2,103**	**.**	**.**	**.**
Brazil	546	549	551	562	.	.
Canada	171	169	165	159	171	.
Mexico	16	17	17	17	.	.
Russia	100	.	.	.	.	.
South Africa	596	596	596	596	.	.
USA	2,713	2,666	2,639	2,605	2,521	2,369
World	**5,884**	**6,037**	**6,020**	**6,029**	**5,792**	**5,480**

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)

	2017	2018	2019	2020	2021	2022
Austria	4.8	4.7	4.4	4.5	4.6	4.6
France	4.7	4.4	4.4	4.5	4.1	3.6
Germany	5.7	5.9	5.8	5.3	5.1	4.8
EU 28	**4.0**	**4.0**	**4.1**	**.**	**.**	**.**
EU 27	**.**	**.**	**4.0**	**3.9**	**3.8**	**3.7**
USA	7.4	7.3	7.3	7.1	6.9	6.6

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

“The European poultry meat sector is an asset to our economy with regards to trade with non-EU countries. The growing popularity of European poultry meat across the world is creating new opportunities for our producers to strengthen our trade links and secure new markets.”

Duck

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

	2017	2018	2019	2020	2021	2022
Austria	0.1	0.4	0.5	0.6	0.9	0.9
Belgium / Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1
Denmark	1.8	1.2	1.5	1.3	1.3	0.1
Finland	0.0	0.0	0.0	0.0	0.0	0.0
France	203.6	227.3	226.3	193.5	176.6	115.4
Germany	40.5	41.4	38.9	30.7	26.3	25.7
Greece	0.1	0.1	0.1	0.1	0.0	0.0
Ireland	5.8	5.8	4.5	5.0	5.5	5.5
Italy	5.5	6.0	4.0	4.0	4.0	3.0
Netherlands	18.0	19.0	.	.	.	.
Portugal	10.1	10.6	10.6	9.7	9.7	9.7
Spain	3.7	3.2	4.6	4.5	4.3	4.1
Sweden	0.0	0.0	0.0	0.0	0.0	0.0
Bulgaria	19.6	23.1	19.8	19.8	19.9	19.9
Cyprus	0.0	0.0	0.0	0.0	0.0	0.0
Czech Republic	11.1	12.2	11.0	12.0	10.3	11.0
Estonia	.	.	.	.	.	.
Hungary	68.0	122.9	118.4	82.5	117.8	115.4
Latvia	.	.	.	.	.	.
Lithuania	0.1	0.1	0.0	0.0	0.0	0.0
Malta	.	.	.	.	.	.
Poland	47.5	45.0	52.2	70.1	57.9	67.8
Romania	.	.	.	.	.	.
Slovakia	0.4	0.4	0.6	0.6	0.6	0.6
Slovenia	.	.	.	.	.	.
EU 27	**475.0**	**555.0**	**550.0**	**500.0**	**495.0**	**445.0**
United Kingdom	30.6	30.4	28.3	22.7	21.3	.
EU 28	**505.6**	**585.4**	**577.9**	**.**	**.**	**.**
World	**4,426.0**	**4,661.0**	**6,072.0**	**6159.0**	**6201.0**	**.**

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

For further data and information:
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Projections

14. a) Poultry meat market balance in the EU, 2023–2032 (‘000 tonnes carcass weight equivalent)

	2023	2024	2025	2026	2027	2028	2029	2030
Gross Indigenous Production	13125	13347	13452	13484	13516	13547	13565	13585
Imports (meat)	990	905	881	876	881	886	892	898
Exports (meat)	2104	2184	2245	2265	2286	2305	2325	2339
Net trade (meat)	1114	1279	1365	1389	1405	1419	1434	1441
Consumption	12012	12068	12087	12095	12111	12128	12132	12144
per capita consumption (kg r.w.e.)*	23,3	23,5	23,6	23,7	23,8	23,9	23,9	24,0
EU market price in EUR/t	2105	2088	2000	1998	2026	2034	2035	2033
World market price in EUR/t	1555	1602	1490	1488	1492	1477	1464	1458
World market price in USD/t	1571	1618	1646	1674	1704	1713	1722	1736

			Difference[a]		Annual growth (%)[b]	
	2031	2032	2022–2012	2032–2022	2012–2022	2022–2032
Gross Indigenous Production	13604	13627	2530	247	2,1%	0,2%
Imports (meat)	904	910	-108	127	-1,3%	1,5%
Exports (meat)	2353	2371	419	174	2,1%	0,8%
Net trade (meat)	1449	1461	527	47	4,8%	0,3%
Consumption	12155	12165	2003	200	1,8%	0,2%
per capita consumption (kg r.w.e.)*	24,0	24,1	3,6	0,7	1,7%	0,3%
EU market price in EUR/t	2036	2057	132	-35	0,7%	-0,2%
World market price in EUR/t	1457	1470	60	27	0,4%	0,2%
World market price in USD/t	1749	1773	-231	158	-1,3%	0,9%

*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 2022–2032, The European Commission, DG AGRI, December 2022 (https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en)

Projections

14. b) Aggregate meat market balance in the EU, 2023–2032 (‘000 tonnes carcass weight equivalent)

	2023	2024	2025	2026	2027	2028	2029	2030
Gross Indigenous Production	43126	43069	42865	42516	42282	42124	42022	41926
Imports of live animals	6	6	6	6	6	6	6	6
Exports of live animals	287	298	293	290	287	280	273	266
Net Production	42846	42777	42578	42232	42002	41850	41755	41666
Imports (meat)	1644	1545	1513	1508	1509	1507	1508	1509
Exports (meat)	6548	6532	6415	6387	6375	6356	6344	6324
Net trade (meat)	4904	4987	4902	4880	4866	4849	4837	4815
Consumption	37946	37786	37665	37353	37138	37003	36919	36851
per capita consumption (kg r.w.e.)*	66,8	66,9	66,9	66,7	66,5	66,3	66,3	66,2
of which Beef and Veal meat	10,3	10,2	10,1	10,0	9,9	9,8	9,7	9,7
of which Sheep and Goat meat	1,3	1,3	1,3	1,3	1,3	1,3	1,3	1,3
of which Pig meat	31,9	31,9	31,9	31,6	31,5	31,4	31,3	31,3
of which Poultry meat	23,3	23,5	23,6	23,7	23,8	23,9	23,9	24,0

			Difference[a]		Annual growth (%)[b]	
	2031	2032	2022–2012	2032–2022	2012–2022	2022–2032
Gross Indigenous Production	41797	41662	3369	-2574	0,8%	-0,6%
Imports of live animals	6	6	4	0	9,3%	-0,7%
Exports of live animals	260	253	73	-50	2,8%	-1,8%
Net Production	41543	41415	3299	-2524	0,8%	-0,6%
Imports (meat)	1511	1512	-221	147	-1,5%	1,0%
Exports (meat)	6344	6349	2036	-1019	3,3%	-1,5%
Net trade (meat)	4833	4837	2256	-1166	4,8%	-2,1%
Consumption	36711	36578	1044	-1360	0,3%	-0,4%
per capita consumption (kg r.w.e.)*	66,1	66,0	1,1	-1,5	0,2%	-0,2%
of which Beef and Veal meat	9,6	9,5	-0,5	-0,8	-0,5%	-0,8%
of which Sheep and Goat meat	1,3	1,3	-0,3	0,0	-1,8%	0,1%
of which Pig meat	31,2	31,1	-1,7	-1,3	-0,5%	-0,4%
of which Poultry meat	24,0	24,1	3,6	0,7	1,7%	0,3%

*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 markets, income and environment 2022-2032, The European Commission, DG AGRI, December 2022 (https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en)

EU27 poultry meat imports by product type, 2022, 2021, 2020, 2015

IMPORTS

Product definition	Quantity (tonnes)				Value €/kg	
	2022	2021	2020	2015	2022	2021
Total Product Groups	851.973	793.194	800.848	958.92	2,35	1,55
Poultry salted meat in brine	246.373	232.133	227.658	315.547	1,93	1,25
Frozen chicken meat	202.869	140.804	176.355	220.626	2,05	1,42
Fresh chicken meat	191.294	213.516	159.74	121.59	1,03	0,72
Poultry preparations	141.672	108.863	114.05	203.286	5,85	4,63
Poultry fats	33.432	39.357	13.953	7.649	1,12	0,87
Chicken offal	21.828	40.404	75.162	46.655	0,52	0,40
Frozen turkey meat	9.937	10.257	21.531	22.496	2,71	2,26
Fresh turkey meat	3.973	6.554	7.413	16.58	1,41	1,18
Turkey offal	329	429	1.643	1.108	0,89	0,84
Duck & goose offal	147	439	313	767	3,01	1,63
Frozen duck & goose meat	97	345	2.24	1.951	3,31	3,25
Fatty duck & goose liver	3	46	35	10	30,42	40,29

Source: Eurostat (Comext) – https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html, July 2023

EU27 poultry meat exports by product type 2022, 2021, 2020, 2015

EXPORTS

Product definition	Quantity tonnes				Value €/kg	
	2022	2021	2020	2015	2022	2021
Total Product Groups	2.045.778	2.239.802	2.511.935	2.133.169	2,20	1,65
Frozen chicken meat	1.097.285	1.296.644	1.504.448	1.264.155	1,23	0,93
Fresh chicken meat	504.147	484.319	446.371	348.600	2,85	2,27
Poultry preparations	180.926	166.199	171.611	145.627	6,32	5,34
Frozen turkey meat	92.470	116.996	134.002	130.798	1,82	1,36
Chicken offal	87.275	77.152	136.152	84.090	0,83	0,60
Fresh turkey meat	32.130	32.586	30.452	39.993	4,13	2,91
Frozen duck & goose meat	19.478	26.227	23.391	32.614	4,37	2,84
Poultry fats	13.917	13.865	17.511	21.911	2,18	1,81
Turkey offal	7.155	7.235	6.776	19.785	1,18	1,01
Poultry salted meat in brine	4.296	6.662	30.662	29.789	1,85	1,46
Fresh duck & goose meat	2.938	4.791	3.019	6.421	6,38	4,37
Other poultry fresh or frozen meat	1.576	1.906	1.783	2.270	4,27	3,58
Duck & goose offal	1.180	2.914	3.924	4.481	3,08	2,70
Fatty duck & goose liver	903	1.990	1.655	2.509	38,33	26,43
Other poultry offal	98	295	150	122	4,29	4,16

Source: Eurostat (Comext) – https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html, July 2023

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