



# Annual report

2020





## 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



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# Introduction

There is no doubt that 2020 will be remembered as the year of the COVID-19 pandemic. The COVID crisis has illustrated the disastrous knock-on effects such a pandemic can have, not only on our health but also our economy, the functioning of our supply chains and the future of Europe in general.

Like other livestock sectors, the European poultry meat sector successfully maintained a stable supply of high-quality, safe and affordable food for millions of EU citizens during the COVID-19 pandemic. This is European food security in practice.

The outbreak has reinforced the critical need to strengthen the sustainability and resilience of our societies and the functioning of our economies. This is necessary above all to manage the impact of similar health emergencies in the future, which are more likely to occur as climate and environmental changes escalate. There is no better option for us in health, sanitary and sustainability terms than supporting the European livestock sector. This crisis proved it clearly: the livestock sector is a true European asset.

Within the EU, 2020 will also be remembered as the year the new Green Deal was struck. As part of this, a sustainable Farm to Fork Strategy and Biodiversity Strategy were launched by the European Commission. For AVEC this is really good news – because European poultry meat is a source of affordable, lean, high-value, traceable protein, produced with high standards of food safety, animal welfare and environmental protection. As such, European poultry meat is a part of the solution when it comes to designing a fair, healthy and environmentally friendly food system for the EU.

When deciding on policies for creating this fair, healthy and environmentally friendly food system, AVEC encourages the European Commission to base its policies on science and not emotions; to carry out cumulative impact assessments on all the measures to understand potential side-effects; and to consider the efforts already put in place by the sectors themselves.

It is also of utmost importance to look at imports into the EU. We import a lot of poultry meat from third countries, and to create a level playing field we need to ensure that the imported products have been produced under standards that are identical to those in the EU.

Additionally, to enable consumers to make an informed choice, mandatory labelling of origin (EU/non-EU) should be included on all poultry meat and meat products in all settings, including restaurants and other places where out-of-home consumption takes place.

The EU poultry meat sector has invested heavily in the most stringent standards for food safety, animal health and welfare, and environmental protection. We are committed to investing further in our natural resources according to EU frameworks in order to further improve the resilience and sustainability of our sector, thereby providing EU citizens with probably the best poultry meat in the world.



**Paul Lopez**  
President



**Birthe Steenberg**  
Secretary general

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**Sustainable production**

European poultry meat is a source of affordable, lean, high-value, traceable protein, produced with high standards of food safety, environmental protection and, last but not least, animal welfare. This is why that when it comes to the Farm to Fork Strategy, poultry meat is part of the solution.

”



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

Our members are national organisations representing poultry processors and the poultry trade in 17 EU countries. AVEC's members represent 95% of EU poultry meat production.

## Administrative structure

The AVEC secretariat is based in Brussels, where Secretary general Birthe Steenberg, Senior policy advisor Paul-Henri Lava, and Project officer Federica Chiarella work to serve the European poultry meat sector.

## The presidency and the board

The president of AVEC is Paul Lopez from the French association FIA (Fédération des Industries Avicoles). He chairs AVEC's board meetings and general assembly, and participates in AVEC's working groups. AVEC has four vice-presidents who assist the president:

- Zbigniew Idziaszek, KRD (Poland)
- Paul-Heinz Wesjohann, BVG (Germany)
- Philip Wilkinson, BPC (UK)
- Mario Veronesi, Unaitalia (Italy)

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 working groups undertake technical discussions, the outcomes of which result in positions that serve to advise the board. There are five working groups covering the following key areas:



**Animal health and welfare**



**Food safety and food quality**



**Sustainability**



**Trade/promotion**

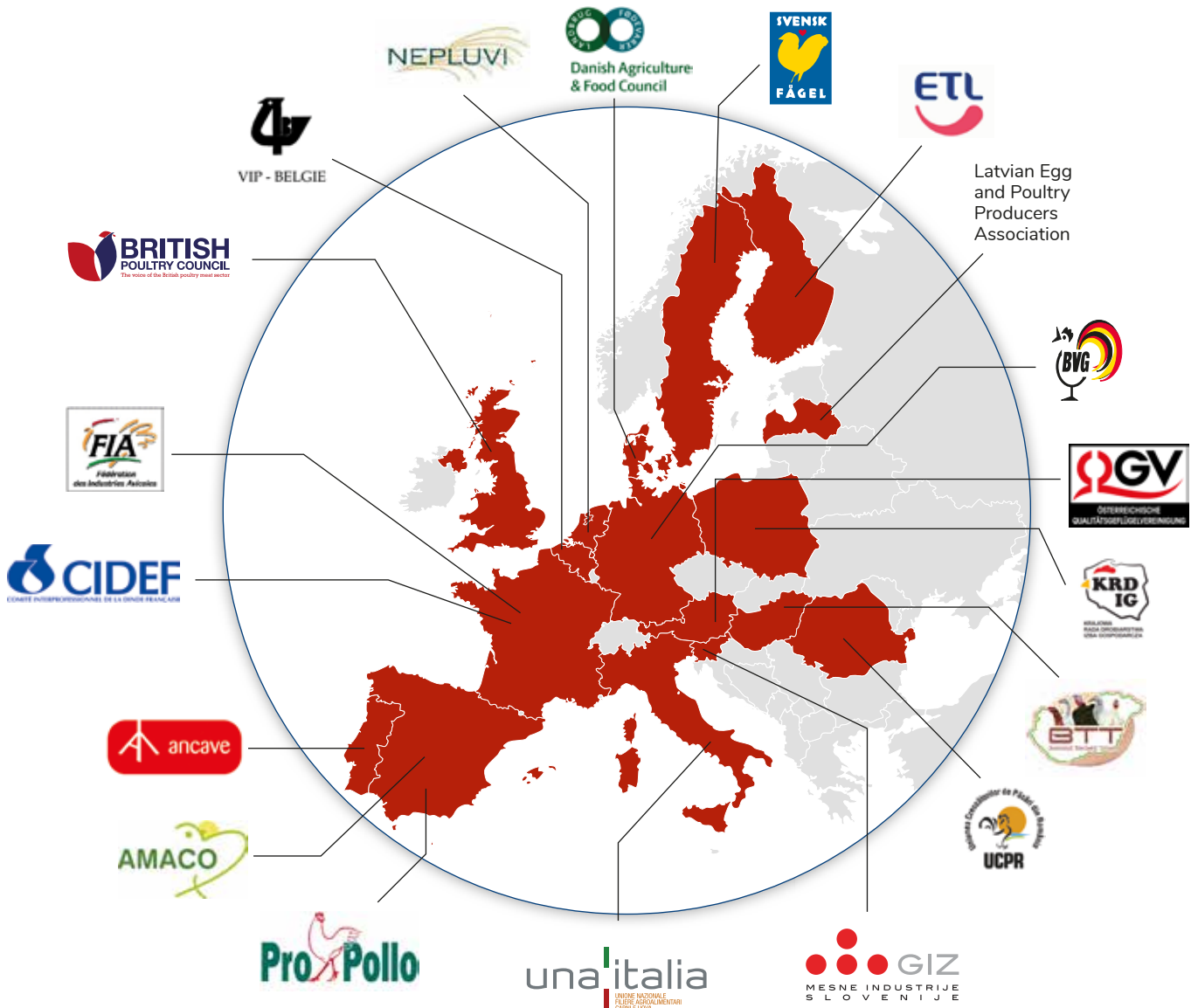


**Communication**



# Our members

AVEC represents the European poultry sector, giving a voice to all players. Our members include national organisations that represent the poultry industry and poultry trade in 17 EU member states.



# Our members

## AUSTRIA

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# Our members

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# Board members, 2019–2020

Country	Board Member	Deputy Board Member
AUSTRIA	Harald Schliessnig	Stefan Weber
BELGIUM	Philip Eeckman	Ann Truyen
DENMARK	Stig Munck Larsen	Kristian Kristensen
FINLAND	Terhi Virtanen	Petri Toivola
FRANCE	Paul Lopez	Yann Brice
GERMANY	Paul-Heinz Wesjohann	Thomas Janning
HUNGARY	Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
LATVIA	Anna Erliha	Solvita Gulbe
NETHERLANDS	Gert Jan Oplaat	Peter Vesseur
POLAND	Zbigniew Idziaszek	Dariusz Goszczyński
PORTUGAL	Avelino Gaspar	Dinis dos Santos
ROMANIA	Ilie Van	Theodora Popa
SLOVENIA	Enver Šišič	Janez Rebec
SPAIN	Antonio Sánchez	Jordi Montfort
SWEDEN	Maria Donis	Magnus Lagergren
UNITED KINGDOM	Philip Wilkinson	Richard Griffiths

“ In recent years, the use of antibiotics in the poultry sector has been drastically reduced by numerous measures across the entire breeding chain. ”

# EU and international key partners

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

## ELPHA and EPB

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

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

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

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



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



Animal health



Meat processors



Farmers and  
cooperatives



Leather



Breeders



Foie gras



Feed



Feed additives



Fur

## AVEC, a member of the International Poultry Council

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



# AVEC's focuses 2019–2020

This section provides an overview of AVEC's main focuses during 2019–2020. You will find a general description of the issues, along 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)

# The Impact of COVID-19 on the EU poultry meat sector

The European poultry meat sector has been significantly impacted by the COVID-19 crisis. As a result of the dedication and hard work of everyone working in the sector, poultry meat has been supplied in sufficient quantities to all customers. Nevertheless, the sector has not emerged unscathed from the crisis.

## Impact on consumption

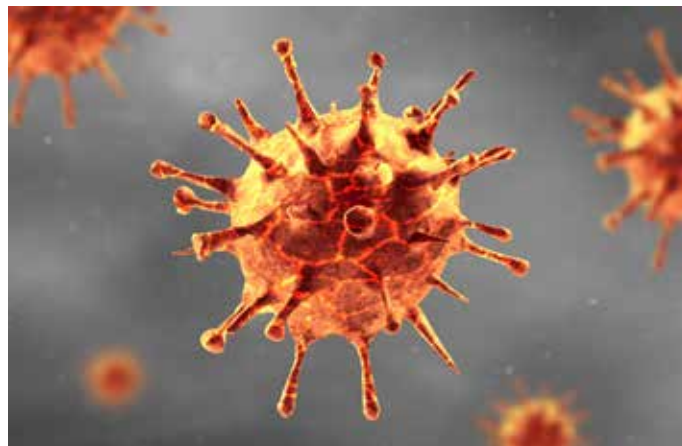
As soon as lockdowns began to be imposed across Europe, a high demand for poultry meat was observed in retail settings. This increase – equating to over 20% – lasted two to three weeks, after which retail sales returned to levels that were similar to normal (only slightly higher than before the lockdown). However, this short-term increase in retail demand was not sufficient to compensate for the loss of the out-of-home consumption market, which normally represents 20–40% of poultry meat consumption, depending on the country.

In terms of species, chicken and turkey benefited most from the increased retail demand during the first few weeks, while other species, such as duck, guinea fowl and quail were hit very hard by the closure of restaurants. In some countries (The Netherlands for example) the duck production stopped completely, and recovery after the crisis will be very hard for these sectors.

## Impact on production

The lack of demand for poultry meat from the HORECA sector resulted in lower production levels at poultry plants which normally produce meat for the food service sector. This was made harder by the difficulty of shifting production from poultry intended for food services to retail production. Furthermore, protective measures to maintain the safety of workers led to an inevitable slowing down of production line speed.

Collectively, these factors created a ‘chain reaction’ which included a lower demand to slaughter poultry at slaughterhouses; less demand for farmers who had to empty barns; and



reduced production at hatcheries, sometimes with the need to depopulate parent stock. The placement of birds on farms decreased by 10–20% across European countries, and prices fell to a very low level.

AVEC has been in regular contact with the European Commission and several Members of the European Parliament to inform them about the situation and to ask them to take measures to support the poultry meat sector. In particular, AVEC has been pushing for the following measures:

### 1. Adjusting imports

As EU producers have reduced production to adapt to lower levels of demand, AVEC has asked the Commission to use its market management power to adjust import levels from third countries in a similar way. This is especially relevant because imported meat is mostly used in the food service channel, which was shut down during the crisis.

### 2. Market measures

AVEC has requested cold storage subsidies to help producers who had to store products that were intended for food services. Almost 500,000 tonnes of poultry meat was put in cold storage during the lockdown, with particularly high levels in

southern European countries. We also asked for compensation revenues for the farmers who had empty barns, resulting in no income. Finally, we asked for support to maintain the parent stocks of small species, which suffered particularly heavily during the crisis, as outlined above.

Unfortunately, none of these measures have been supported by the Commission, which cited budget restrictions and the magnitude of the crisis as reasons for not supporting the poultry meat sector. Nevertheless, AVEC hopes that the sector will benefit from the recovery package that has been put forward by the Commission to assist with modernising operations and preparing them for the future.

### Lessons learned

The poultry meat sector is proud of all those who work in every part of the production chain. COVID-19 suddenly made it clear that these good people are among Europe's most crucial assets when it comes to putting food on people's tables. The credit for maintaining adequate food supply goes to both the companies and their staff, who deserve our sincere appreciation, particularly as they continued to work despite very difficult conditions. The sector has demonstrated both its resilience and its ability to maintain adequate levels of supply, despite the difficulties caused by the virus.

Unfortunately, COVID-19 has not yet been beaten, and at the time of writing the possibility of a 'second wave' is hanging over our heads. The crisis has put the issue of food security at the centre of EU debate. Queues outside supermarkets have reminded everyone that an abundant supply of food should not be taken for granted, and that support for the EU food sector should continue to be a priority for the EU authorities.

AVEC will continue to work with its members to guarantee high-quality EU-produced poultry meat for EU citizens, while contributing to the resilience of the EU food sector.





## 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. As in recent years, there has been a significant focus on animal welfare during 2019 and 2020. When it comes to animal health, avian influenza is unfortunately still posing problems.



Chair, Harald Schliessnig

### Avian influenza in Europe

At the start of 2020, outbreaks of the avian influenza virus H5N8 were confirmed in poultry and wild birds in a variety of EU member states. The first cases were detected in turkeys, then subsequently in layers, broilers, backyard flocks and wild birds. The majority of the cases occurred in waterfowl, especially ducklings. Third countries were quick to impose trade restrictions, which led to severe consequences for the affected EU member states.

At the time of writing, there have been no new cases since the beginning of July 2020, suggesting that the spread of the virus has been effectively stopped. The EU's high biosecurity standards and thorough surveillance systems were key to limiting the spread of the outbreak, and are critical to protecting our flocks.

### The European Council on animal welfare

In a conclusion from December 2019 the European Council found that existing legislation on animal welfare for broilers and laying hens could be further developed or updated, particularly with reference to animal transport, painful procedures and animal welfare indicators. It was also stated that conditions for animal slaughter could be improved, and invited the European Commission to assess the need for and impact of new legislation covering pullets, turkeys and breeding stocks. The EU Council stressed the need to improve the welfare of

animals during transport over long distances, and invited the Commission to assess the need for an EU regulatory framework with criteria for voluntary or compulsory animal welfare labelling schemes.

### Sustainable farm to fork – on animal welfare

The conclusions from the European Council were mirrored in the Sustainable Farm to Fork Strategy unveiled by the European Commission on 20 May 2020. This states that the Commission will revise animal welfare legislation, including animal transport and the slaughter of animals, to align it with the latest scientific evidence. At the same time, it will broaden the legislation's scope and make it easier to enforce, ultimately ensuring a higher level of animal welfare. The legislative process is expected to be completed in 2023.

### Scientific evidence produced by EFSA on animal welfare

The scientific basis for the legislation will principally be established by the European Food Safety Agency (EFSA). As part of this process, EFSA published its scientific opinion on the welfare of poultry at slaughter in November 2019. This details several hazards that give rise to welfare issues – such as pain, thirst, hunger or restricted movement – and proposes preventive and corrective measures where possible.

In July 2020, the European Commission asked EFSA to prepare a scientific opinion on the welfare of broilers, covering all phases of the production cycle, namely:

1. The keeping of day-old chicks (up to 72 hours of age)
2. The keeping of broiler breeders
3. The keeping of chickens for meat production

EFSA has been asked to describe current husbandry systems and practices, as well as provide an analysis of the relevant

welfare consequences, and to put forward recommendations to prevent, mitigate or correct negative welfare consequences. The deadline for EFSA's response is December 2022.

### **Animal welfare labelling**

One of the key priorities for the German Presidency of the EU during the second half of 2020 is to adopt conclusions on EU harmonised legislation for animal welfare labelling. The EU Platform on Animal Welfare, which aims to promote dialogue among competent authorities, businesses, civil society organisations and scientists on animal welfare issues, will launch a subgroup on animal welfare labelling to support this. AVEC has put forward its President Paul Lopez as a candidate to sit on the subgroup.

### **European Reference Centre for the Welfare of Poultry**

In October 2019, the Commission designated a European Reference Centre with responsibility for the welfare of poultry and other small farmed animals. The centre aims to improve the enforcement of EU legislation applicable to laying hens, chickens for meat production and other small farmed animals, including their transport and slaughter protocols.

The centre is a consortium made up of the Agence nationale de sécurité sanitaire de l'alimentation, de l'environnement et du travail (France); the Institut de Recerca I Tecnologia Agroalimentàries (Spain); Institut for Husdyrvidenskab, Aarhus Universitet (Denmark); and Istituto Zooprofilattico Sperimentale della Lombardia e dell'Emilia Romagna (Italy).

The centre commenced its work on 1 February 2020 although its activities have been impacted by the COVID-19 crisis. AVEC will establish close links with the centre in order to achieve the most effective dialogue possible.

### **Antimicrobial resistance and the use of veterinary antibiotics**

The Farm to Fork Strategy launched in May 2020 includes an ambitious target to reduce the use of veterinary antibiotics.

The European Commission will take action to reduce overall sales of antimicrobials for farmed animals by 50% by 2030.

AVEC welcomes this ambitious target on the reduction of the use of antibiotics. Nevertheless, it is important to acknowledge the achievements that have already been made. In several EU countries there has already been a significant reduction in the use of antibiotics in poultry production. The frontrunners should not be penalised for their early and successful action.

### **Animal welfare is already underpinned by EU legislation**

European poultry meat production is known worldwide for its high animal health and welfare standards. The Broiler Welfare Directive was sent out in 2007 and a lot of work has been done over the intervening years to improve animal welfare for broilers.

AVEC is concerned that further new demands on welfare will reinforce the position of third countries to the detriment of EU producers. It is difficult for European producers to accept further demands while cheaper poultry meat – which does not meet the same high EU standards – is imported on a very large scale.

It is of utmost importance that the coming legislation is built on objective facts and science, and that at the same time thorough impact assessments are carried out and all relevant stakeholders are given a voice. AVEC is committed to being a part of the solution when it comes to the creation of a sustainable farm to fork strategy, but believes that sustainability has three pillars: environmental, social and economic. The new framework for poultry meat production based on the Sustainable Farm to Fork Strategy has to be economically realistic so that it will remain possible to earn a living as a poultry meat producer.





## AVEC Working group on food safety and food quality

That food is safe and of good quality are things that the majority of consumers take for granted. Decades of close cooperation between regulators and industry has created a system that both supports the production of safe food and can react quickly when a new issue emerges. Even so, no sector could have been prepared for the challenge that is COVID-19. Demand soared and panic-buying took hold as lockdowns were initiated across Europe, and keeping food supply chains moving became a high priority, close behind health and disease control.



Chair, Richard Griffiths

Suddenly workers in the food production sector were among a nation's most crucial assets, and putting food on everyone's tables was essential. Food systems were shaken by this almost instantaneous change in environment, but they did not break. Years of work, which has established a robust supply chain, meant that systems kept working amidst the chaos; and standards of production – including fundamental food safety – were guaranteed despite the upheaval.

AVEC has quietly but effectively championed food safety throughout its existence. The current members of the Working group on food safety and food quality are proud to have tackled campylobacter, reviewed marketing standards, and implemented the new Official Controls Regulation, and we know that our work will improve those food safety systems. These achievements are dwarfed, however, by the pride we

have for the people in our sector who have kept citizens fed during a pandemic that is unprecedented in our lifetimes.

AVEC will continue to drive the science and technology behind food safety and quality. Our aim is that anyone who picks up a pack of poultry in any supermarket from Copenhagen to Coimbra can have trust and confidence in the food they are choosing for their family. That is what drives us while we talk in detail about water content or meat inspection, and we hope we have contributed in some small way to a strong food production system that has stood up to a pandemic.

I would like to extend my thanks and appreciation to the AVEC members who work so tirelessly to improve food safety, and to the AVEC team who have kept us moving forward together in this most unusual year.





## Promotional campaign: This is European poultry!

In July 2020 a new campaign to promote the benefits of European poultry was launched under the banner 'This is European poultry!'.

Co-financed by the EU, the two-year campaign has been designed by AVEC and five of its members (BVG, CIDEF, KRD-IG, NEPLUVI and UNAITALIA). Its principal aim is to raise awareness of the high standards of poultry meat production in Europe.

The campaign has been granted EUR 5.5m by CHAFEA, the EC Consumers, Health, Agriculture and Food Executive Agency. It forms part of a wider European Commission programme to promote agricultural products which uses the strapline 'Enjoy! It's from Europe!'.

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

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

An event focusing on these topics will take place on 13 October 2020 in partnership with the media network Euractiv. This will bring together high-level speakers in Brussels with a virtual audience to discuss the role of poultry meat in the future EU Farm to Fork Strategy. Poultry snacks will also be offered to participants of the next Brussels 20km race to reward them



for their efforts ... and to strengthen their awareness of the high standards of poultry production in the EU.

Consumers can be confident about buying and consuming EU poultry meat: 'Enjoy! it's from Europe!'. Discover more on our website: [eu-poultry.eu](http://eu-poultry.eu) (available in six languages)



## AVEC Working group on sustainable production

In 2018, AVEC created a working group dedicated to the sustainable production of poultry meat. This focuses on two main topics:

1. The revision of the BREF for slaughterhouses
2. The policies developed by the Commission in relation to the Green Deal



Chair, Christophe Lapasin

### The revision of the BREF for slaughterhouse

The working group is actively participating in the current review of the Best Available Techniques (BAT) reference document for slaughterhouses and animal by-product industries, the main document of Directive (CE)75/2010. This Directive sets the European environmental framework for slaughterhouses with a production capacity of over 50 tons per day, and animal by-product plants producing over 10 tons per day.

AVEC's taskforce is composed of representatives from Belgium, Denmark, France, Germany and the Netherlands. The working group gathered several times in 2019 in order to provide inputs into a questionnaire that has been used to collect information on the existing situation in the EU.

The data collection ended in May 2020 with good participation from European companies, despite the COVID-19 crisis. The working group is now waiting for the Commission's analysis of the data and will follow the next steps very closely until the conclusions of the BAT are determined.

### The new Biodiversity and Farm to Fork Strategies

On 20 May 2020 the new Biodiversity and Farm to Fork (F2F) Strategies were released as part of the Green Deal proposed by the European Commission. These strategies come with a package of measures that will be debated and implemented

over the next four years, with the aim of changing the way food is produced in the EU in order to make it more sustainable. AVEC supports the ambition of the European Commission to make food production in the EU more sustainable by designing a fair, healthy and environmentally friendly food system. We are ready to take up the challenge and demonstrate that the European poultry meat sector is part of the solution.

### EU poultry meat sector is part of the solution

Poultry meat has numerous assets when it comes to sustainability, as it has a low carbon footprint, while being both nutritious and affordable. Furthermore, the sector has already achieved good results when it comes to sustainability in areas such as environmental performance, animal welfare, reduction of antibiotic use and biosecurity.

Unfortunately, we sometimes get the impression that this good work has not been fully recognised in the new F2F strategy and by the public in general. There is a tendency to identify the livestock sector as being substantially responsible for climate change, without recognising its benefits. Livestock production



represents less than 6% of total EU emissions. Other sectors outside agriculture, such as energy and transport, contribute a lot more. As a result, AVEC and other livestock-related organisations in Brussels have formed the group European Livestock Voice in order to communicate better and provide reliable information on livestock production. Its work is also challenging myths and false information that are spread in the public domain.

### **The importance of preserving EU food security**

The COVID-19 outbreak has illustrated the critical need to strengthen the sustainability and resilience of our societies. We welcome the fact that the new F2F strategy emphasises the importance of food security. However, we fear that the new set of demands resulting from this initiative will jeopardise the productivity of our farmers and producers, and ultimately reduce EU food security. The absence of a holistic impact assessment that can assess the overall effect of these measures on EU food security is highly problematic, as highlighted by AVEC on many different occasions.

### **Building policies on facts, not emotions**

The European poultry sector is known worldwide for its safety and quality; its high standards of animal health and welfare; the quality of its animal breeding and nutrition; and for its efficient use of resources. We are good at producing more with less. For this to continue it is of the utmost importance that new European legislation is built on objective facts and science. It is also vital that the producers who take care of animals on a daily basis are listened to, and that measures are economically viable and practical to implement in the field.

### **Protecting EU producers from unfair competition**

AVEC is concerned that new trade demands risk reinforcing the position of third countries to the detriment of EU producers. The proposal for 'enhanced cooperation' with trade partners lends weight to this fear. It is difficult for European producers to accept further demands while cheaper poultry meat – which does not meet the same high EU standards

– is imported on a very large scale. The credibility of the EU's commitment to developing a sustainable food system will be assessed on its capacity to prevent imports that do not meet European standards.

### **Improving environmental efficiency**

AVEC has identified three main approaches that could be taken to improve the sector's environmental efficiency:

- working towards carbon neutral production by 2050
- reducing Europe's dependency on soybeans
- creating recycling lines for the plastic trays used in the sector (the EU has announced the implementation of a plastic tax of 0.8€/kg on plastic packaging waste from January 2021, which ties in with this objective)

The EU poultry meat sector is ready to take up the challenge of developing a sustainable food system and is determined to show that we are part of the solution. We are looking forward to assisting the Commission in achieving this goal, and we hope that our contributions will help shape policies that will both enhance sustainable poultry production and build a sustainable future for our children.





## AVEC Working group on trade

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

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



Chair, Stig  
Munck Larsen

### Main trade issues in 2019–20

Over the last year the Working group on trade has had to deal with several issues of major importance for the sector.

#### 1. COVID-19

The COVID-19 pandemic has caused significant disruption to the poultry meat trade. Within the internal market, the reintroduction of border controls by member states caused significant delays to the circulation of goods. Fortunately, this was solved rapidly via good work between the European Commission and the relevant member states, and ultimately the level of disruption to the trade within the internal market was modest.

The global situation has been more complex. It has been characterised by decreased EU trade flows, both with regard to imports and exports. The COVID-19 crisis may not be the only reason for this, as the same trend had been observed before the crisis began in Europe. A lack of availability of containers due to diminution of trade in China may be one reason for this, along with depressed prices of poultry meat at a global level.

Avian influenza outbreaks in Eastern Europe (Poland and Hungary especially) also contributed to a decrease in EU exports

as many third countries imposed country-wide bans and do not recognise regionalisation.

In this context, it appears that COVID-19 accentuated existing difficulties, slowing down trade activities even further. EU trade statistics to May 2020 show a decrease of 17% for exports and 21% for imports.

#### 2. Brexit

On 1 February 2020 the UK officially left the European Union, although the EU and UK authorities agreed on a transition period that ensures the UK remains both in the EU customs union and the single market until 31 December 2020. Negotiations on the future trade relationship are ongoing, and everyone hopes that an agreement will be found before the end of the transition period in order to avoid a hard Brexit.

Regarding poultry meat, AVEC, in agreement with its British member the BPC, has indicated to the EU authorities that it expects duty-free/quota-free access to be maintained on both sides, providing that a level playing field is guaranteed between the EU and the UK. Maintaining the same high levels of food safety, animal welfare, animal health and environmental standards is paramount.

Another important issue is maintaining effective rules of origin to ensure that preferential access benefits only EU and UK operators, and to prevent indirect imports of poultry meat from third countries. Finally, AVEC supports the WTO tariff-rate quotas split between the EU and the UK, based on the methodology agreed between the UK and EU authorities.

In the case of a no-deal situation, a hard Brexit will have a significant negative impact on the EU (and UK) poultry sectors,

as WTO duties will be imposed on both sides, leading to customs duties of 20–30% on traded poultry meat.

### 3. Mercosur

In 2019 the European Commission concluded an agreement with the Mercosur countries, 20 years after negotiations started. While Brazil already had significant access to the EU market (with more than 440,000 tonnes of direct quota), a further 180,000 tonnes (half bone-in/half boneless) were granted to the Mercosur countries, representing precisely double the amount made as part of the previous offer at the end of 2017.

It is clear that the EU poultry sector has been sacrificed in these negotiations, and this is despite the fraud scandals within the Brazilian poultry industry ('Operation Carne Fraca'), along with

audits from DG SANTE revealing major issues with Brazilian poultry production.

With these additional quotas, the EU will import the equivalent of Germany or France's chicken meat production. This additional quota will apply to the EU27 only, since the UK will have left the Union when the agreement begins.

Finally, consumers will have no opportunity to identify the origin of this meat, since these imports will be used in processed products and food services sectors, where labelling of origin is not mandatory. The debate prior to the vote within the EU Parliament and Council is expected to take place in October 2020, and AVEC will firmly defend the interests of EU poultry producers with a view to blocking this agreement.



### 4. South Africa

Despite the fact that the Economic Partnership Agreement (EPA) between the EU and South Africa allows for mutual free market access for poultry meat, South Africa has imposed several measures to protect its local poultry production. This began with the imposition of significant anti-dumping duties affecting companies from the UK, Germany and the Netherlands. It continued with high safeguard duties on imports from all EU countries, along with import bans on several EU countries due to previous outbreaks of avian influenza. These measures are in breach of OIE rules (neither regionalisation nor disease-free status was respected).

The activation of a sunset review designed to prolong the anti-dumping duties (formerly due to expire on 27 February 2020), shows the determination of the South African industry to maintain protectionist measures.

AVEC made clear to the South African authorities that similar products to those exported to South Africa are sold in the EU market and cannot therefore be considered as 'dumped'. We hope that our arguments will be taken into consideration this time.

AVEC is of the firm belief that these obstacles to trade are not in compliance with the agreement and should be addressed accordingly. Despite AVEC's and the European Commission's efforts to facilitate dialogue with the South African poultry sector, South Africa has so far not been willing to find a political solution that would satisfy both sides.

South Africa has free access to the EU market, thanks to the EPA, provided it respects EU legislation regarding its exports. It does not have access to the market in USA and Brazil, which are the main exporters of poultry meat to South Africa.

If a common position respecting the mutual interests of producers and consumers cannot be found, AVEC will strongly encourage the Commission to use the dispute settlement body established under the EPA to contest the measures.

## 5. Ukraine

In February 2020 a new agreement was implemented between the EU and Ukraine. This closes a loophole that Ukrainian exporters had exploited since 2016 to circumvent the quota in the free trade agreement. The concession of 50,000 tonnes is of course a very painful price to pay for settling this matter, but without this agreement there would have been no limit to imports of poultry breast from Ukraine.

We hope this agreement will mark the start of a renewed relationship based on trust and confidence with our Ukrainian counterparts, beginning with the negotiation of an EU certificate to export MSM products and the Ukrainian implementation – as soon as possible – of EU legislation, especially regarding animal welfare, as committed to in the FTA agreement.

## 6. Future EU trade policy

DG Trade has opened a consultation on the EU Trade Policy Review, with the objective of 'building a consensus around a fresh medium-term direction for EU trade policy, responding to a variety of new global challenges and taking into account the lessons learned from the coronavirus crisis'.

AVEC is of the opinion that the COVID-19 crisis has highlighted the importance of self-sufficiency when it comes to strategic sectors, such as food. The fact that 25% of poultry breast meat consumed in the EU comes from third countries demonstrates that the EU has become dependent on these countries for its supply of poultry, especially for the food service sector.

Therefore, we ask the Commission to stop granting additional access for poultry meat to third countries in future trade agreements, knowing that our sector is by far the most open meat sector in the EU.

In more general terms, we would welcome a tougher approach to trade relations with third countries to ensure that trade follows the agreed rules in free trade agreements, and that breaches to the rules have direct and immediate economic consequences.

In relation to that, we very much welcome the initiative from Commission President Ursula von der Leyen to appoint Denis Redonnet as chief trade enforcement officer, to improve compliance and enforcement of the EU's trade agreements. Having a clearly identifiable figurehead who will defend the EU's trade interests when they are abused will certainly help, and we hope that he will be given the resources and power needed to achieve his remit.





“European poultry meat is a source of affordable, lean, high-value, traceable protein, produced to the highest standards of food safety, environmental protection and, last but not least, animal welfare. Standards for animal welfare of poultry in the EU are among the highest in the world.”

# Statistics

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

	2014	2015	2016	2017	2018	2019
Gross indigenous production	13.273	13.797	14.503	14.564	15.260	15.635
Export of meat	1.365	1.388	1.548	1.532	1.593	1.665
Import of meat	821	855	882	789	802	850
Consumption	12.719	13.254	13.829	13.817	14.462	14.813
Consumption per capita, kg	22,0	22,9	23,8	23,7	24,8	25,3
Self-sufficiency, %	104,4	104,1	104,9	105,5	105,5	105,5

**Note:** Partial provisional or estimated.

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

“ EU poultry sector:  
a global player  
with family-based  
structures ”



# Production (updated 2019)

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

	2014	2015	2016	2017	2018	2019
Austria	122	122	129	133	139	140
Belgium / Luxembourg	433	453	461	463	470	491
Bulgaria	102	106	109	107	118	118
Croatia	68	83	81	80	83	85
Cyprus	22	24	20	25	26	26
Czech Republic	175	175	177	183	193	197
Denmark	173	147	156	156	159	169
Estonia	19	20	20	20	19	19
Finland	113	116	121	130	135	142
France	1.827	1.828	1.830	1.857	1.788	1.754
Germany	1.775	1.807	1.817	1.802	1.822	1.833
Greece	190	175	158	153	242	240
Hungary	543	577	620	602	669	680
Ireland	129	125	132	152	160	170
Italy	1.261	1.321	1.388	1.354	1.314	1.317
Latvia	29	30	30	33	34	35
Lithuania	100	111	112	134	134	134
Malta	4	4	4	4	4	4
Netherlands	941	1.057	1.097	1.118	1.119	1.111
Poland	2.022	2.161	2.425	2.511	2.582	2.720
Portugal	327	336	343	337	342	343
Romania	397	411	419	436	480	485
Slovakia	59	58	66	71	77	79
Slovenia	60	59	67	68	69	71
Spain	1.390	1.453	1.526	1.454	1.427	1.374
Sweden	137	145	156	157	155	160
United Kingdom	1.587	1.663	1.739	1.812	1.937	1.937
<b>EU</b>	<b>14.004</b>	<b>14.643</b>	<b>15.302</b>	<b>15.444</b>	<b>15.696</b>	<b>15.832</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.

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

# Production (updated 2019)

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

	2014	2015	2016	2017	2018	2019
Argentina	2.027	2.093	2.055	2.116	2.130	2.171
Brazil	13.273	13.874	13.891	14.003	13.361	13.993
Chile	663	700	727	711	769	782
China	17.508	18.051	17.149	16.634	16.800	18.800
India	2.759	2.889	3.111	3.544	3.707	3.826
Japan	1.494	1.517	1.545	1.575	1.595	1.604
Mexico	2.880	2.972	3.078	3.212	3.296	3.437
Russia	4.161	4.536	4.717	5.050	5.128	5.156
Saudi Arabia	619	621	642	620	670	702
Switzerland	85	87	91	95	102	103
South Africa	1.742	1.745	1.694	1.673	1.694	1.723
Turkey	1.990	2.031	1.983	2.295	2.382	2.481
Ukraine	1.022	1.027	1.067	1.032	1.054	1.079
USA	20.340	20.955	21.422	21.854	22.220	22.480
<b>World Production</b>	<b>110.442</b>	<b>114.337</b>	<b>116.845</b>	<b>118.080</b>	<b>119.205</b>	<b>120.885</b>

**Note:** Partial provisional or estimated. Mostly gross domestic production. Only chicken and turkey meat.

**Sources:** MEG to USDA, FAO and national data. MEG – Marktinfo Eier & Geflügel <http://www.marktinfo-eier-gefluegel.de>

“ As the third-largest poultry meat producer in the world after the USA and China, the European poultry sector plays an important role on the global stage. ”

# Trade

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

	2014	2015	2016	2017	2018	2019	from third countries
<b>Poultry Meat <sup>1)</sup></b>							
Austria	101	102	114	105	103	108	0
Belgium / Luxembourg	240	252	268	305	295	303	2
Bulgaria	98	103	102	111	110	112	0
Croatia	18	20	21	19	21	22	0
Cyprus	9	10	11	11	12	12	0
Czech Republic	99	114	119	109	115	110	.
Denmark	69	66	58	63	73	77	1
Estonia	18	18	21	19	27	22	0
Finland	7	9	9	10	9	8	.
France	396	420	437	442	457	456	2
Germany	597	614	672	694	721	687	22
Greece	79	72	79	80	82	84	.
Hungary	50	36	40	54	54	68	11
Ireland	82	104	90	82	88	74	0
Italy	66	66	59	68	69	70	3
Latvia	30	28	34	40	43	38	0
Lithuania	33	37	35	39	39	42	0
Malta	5	6	6	6	6	6	.
Netherlands	429	396	503	491	573	594	99
Poland	38	36	47	59	79	91	26
Portugal	59	64	67	67	73	75	0
Romania	119	124	137	143	137	121	2
Slovakia	52	48	53	57	83	97	7
Slovenia	15	17	18	18	20	20	.
Spain	116	155	163	182	169	150	19
Sweden	49	52	55	58	55	57	0
United Kingdom	387	409	435	429	445	434	18
<b>EU</b>	<b>152</b>	<b>155</b>	<b>157</b>	<b>161</b>	<b>234</b>	<b>215</b>	<b>215</b>
<b>Salted meat <sup>2)</sup></b>							
Germany	47	47	50	39	28	30	19
Netherlands	173	170	176	141	121	154	143
United Kingdom	55	59	60	45	36	45	36
<b>EU from third countries</b>	<b>256</b>	<b>265</b>	<b>277</b>	<b>211</b>	<b>176</b>	<b>204</b>	<b>204</b>
<b>Preparations of poultry <sup>3)</sup></b>							
<b>EU from third countries</b>	<b>380</b>	<b>387</b>	<b>401</b>	<b>389</b>	<b>338</b>	<b>338</b>	<b>338</b>

**Notes:** 1. Without preparations, livers, salted meat and live poultry. - 2019 partly preliminary. - Data in the Eurostat trade statistics and trade balance are slightly different. 2. Tariff 0210 99 39, almost exclusively poultry. 3. Tariff items 1602 31 .. 1602 32 .. and 1602 39.

**Source:** MEG to Eurostat and national statistics.

# Trade

## 5. Export of poultry meat by EU countries ('000 tons<sup>1</sup>)

	2014	2015	2016	2017	2018	2019	to third countries
Austria	60	58	57	61	64		1
Belgium / Luxembourg	481	538	576	578	572	503	115
Bulgaria	41	39	41	44	46	43	4
Croatia	6	7	8	8	9	8	4
Cyprus	1	0	1	1	1	1	0
Czech Republic	31	35	37	24	23	18	1
Denmark	77	67	74	86	83	88	44
Estonia	6	6	7	7	7	9	1
Finland	16	17	16	13	14	14	3
France	477	477	433	425	401	362	165
Germany	543	507	494	482	451	466	61
Greece	26	21	21	29	33	35	.
Hungary	204	202	229	183	213	231	51
Ireland	59	69	74	90	87	100	33
Italy	149	154	177	165	158	163	56
Latvia	15	11	13	18	17	16	3
Lithuania	46	49	47	55	51	46	7
Malta	0	0	1	0	0	0	0
Netherlands	1.223	1.150	1.382	1.437	1.495	1.572	448
Poland	714	841	1.025	1.156	1.325	1.453	437
Portugal	20	25	27	42	34	27	11
Romania	59	66	57	59	66	75	8
Slovakia	37	33	30	21	37	36	1
Slovenia	20	17	20	22	23	23	7
Spain	178	198	230	216	245	239	82
Sweden	60	65	76	74	76	84	7
United Kingdom	352	299	296	335	361	383	120
<b>EU</b>	<b>1.331</b>	<b>1.332</b>	<b>1.506</b>	<b>1.483</b>	<b>1.578</b>	<b>1.686</b>	<b>1.686</b>
<b>which were</b>							
Chicken	1.161	1.172	1.323	1.317	1.419	1.525	.
Turkey	138	129	151	140	127	133	.
<b>Preparations of poultry <sup>3)</sup></b>							
<b>EU to third countries</b>	<b>40</b>	<b>38</b>	<b>39</b>	<b>41</b>	<b>44</b>	<b>54</b>	<b>54</b>

**Notes:** 1. Without preparations, livers, salted meat. 2. 2019 partly preliminary. 3. Tariff items 1602 31 .. 1602 32 .. and 1602 39 ..

**Source:** MEG to Eurostat and national statistics.

# Trade

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

	2014	2015	2016	2017	2018	2019
<b>Total imports of poultry meat</b>						
Switzerland	47	47	46	45	45	45
<b>Imports of broiler meat</b>						
Angola	365	240	205	267	260	280
China	260	268	430	311	342	580
Hong Kong <sup>1)</sup>	299	312	344	390	.	.
Iraq	698	625	563	444	527	501
Japan	888	936	973	1.056	1.074	1.076
Russian Federation	444	250	220	225	225	200
Saudi Arabia	762	863	878	711	629	601
United Arab. Emirates	225	277	422	439	579	625
<b>Exports of broiler meat</b>						
Argentina	278	187	158	178	125	.
Belarus	113	135	145	145	.	.
Brazil	3558	3841	3889	3847	3687	3715
Chile	87	99	.	.	.	.
China	430	401	386	436	447	428
Thailand	546	622	690	757	826	881
Turkey	348	292	263	357	418	408
Ukraine	158	158	236	263	317	409
USA	3.359	2.932	3.086	3.137	3.245	3.259

**Sources:** MEG to USDA and national data.

“ AVEC calls on the Commission to apply identical standards on imported products and to reinforce border controls. ”

# Consumption

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

	2014	2015	2016	2017	2018	2019
Austria	21,1	21,3	21,6	21,2	21,7	22,0
Czech Republic	22,5	23,0	23,2	23,5	24,0	25,0
Denmark	24,0	24,7	24,5	23,1	24,0	25,0
Finland	19,2	19,6	20,7	23,1	24,2	24,6
France	26,5	27,1	26,5	28,0	28,9	28,4
Germany	19,5	20,1	20,8	20,8	23,2	23,3
Greece	22,3	20,9	20,0	18,9	19,0	20,0
Hungary	30,5	30,8	31,1	32,0	32,5	33,0
Ireland	30,4	31,7	35,2	34,0	35,0	33,0
Italy	18,8	19,7	20,3	20,7	20,5	20,3
Latvia	19,5	22,0	23,0	22,5	.	23,5
Lithuania	22,8	22,9	23,5	24,0	24,5	26,0
Netherlands	22,5	22,1	22,2	22,1	22,2	22,5
Poland	28,2	27,1	29,2	27,6	29,6	30,0
Portugal	35,1	36,2	37,0	35,1	37,0	35,0
Slovakia	19,8	19,9	20,1	21,0	20,5	22,0
Spain	30,8	31,0	31,4	30,5	31,3	30,0
Sweden	19,8	20,8	21,9	22,0	21,9	.
United Kingdom	28,5	27,3	28,7	28,9	29,7	29,8
<b>EU</b>	<b>22,0</b>	<b>22,9</b>	<b>23,8</b>	<b>23,7</b>	<b>24,8</b>	<b>25,3</b>
Switzerland	18,6	19,0	18,9	17,8	18,4	18,4

**Note:** Partial provisional or estimated.

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

# Consumption

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

	2014	2015	2016	2017	2018	2019
Austria	67	67	68	71	72	73
Czech Republic	72	69	69	68	67	68
Finland	103	99	97	95	98	96
France	105	104	104	99	96	89
Germany	112	110	106	105	95	95
Greece	79	79	75	75	76	80
Hungary	139	143	140	127	130	132
Ireland	99	95	89	93	91	95
Italy	107	107	109	108	107	108
Latvia	64	65	64	70	.	62
Lithuania	115	112	112	115	111	104
Netherlands	196	185	188	186	.	.
Poland	189	211	219	240	245	250
Slovakia	75	75	73	70	.	.
Spain	105	103	105	102	105	107
Sweden	98	99	103	105	115	.
United Kingdom	98	94	93	95	96	97
EU	104	104	105	105	106	106

**Note:** Partial provisional or estimated.

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

“The current standards in place for EU poultry meat are among the highest in the world, with an ongoing focus on improving the quality of production through resource conservation and animal welfare.”

# Broiler

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

	2014	2015	2016	2017	2018	2019
Austria	91	93	108	108	110	114
Belgium / Luxembourg	425	445	453	455	462	465
Bulgaria	80	85	86	87	95	96
Cyprus	23	23	24	25	25	26
Czech Republic	161	160	159	165	170	175
Denmark	173	146	155	154	157	167
Estonia	17	20	20	20	21	21
Finland	106	108	113	122	127	133
France	1.116	1.139	1.133	1.163	1.185	1.173
Germany	1.280	1.285	1.290	1.300	1.345	1.355
Greece	188	173	156	151	185	185
Hungary	329	365	394	409	414	421
Ireland	118	110	160	180	190	200
Italy	872	929	981	1.034	1.001	1.006
Croatia	57	69	67	67	69	70
Latvia	29	30	30	33	34	35
Lithuania	94	105	105	126	127	128
Malta	4	4	4	4	4	4
Netherlands	926	1.046	1.081	1.080	1.080	1.075
Poland	1.568	1.699	.	2.055	2.115	2.230
Portugal	261,6	271	278	287	289	290
Romania	310	350	360	388	415	415
Slovakia	69	70	57	80	80	80
Slovenia	55	54	62	63	64	65
Spain	1.053	1.203	1.268	1.250	1.191	1.133
Sweden	103	113	136	148	150	154
United Kingdom	1.383	1.456	1.535	1.630	1.750	1.749
<b>EU</b>	<b>10.892</b>	<b>11.551</b>	<b>12.092</b>	<b>12.583</b>	<b>12.790</b>	<b>12.964</b>
Argentina	2.110	2.085	2.119	2.150	2.068	2.171
Brazil	12.946	13.547	13.523	13.612	13.555	13.690
China	13.156	13.561	12.448	11.600	11.700	13.750
India	3.930	4.115	3.464	3.767	4.062	.
Indonesia	1.565	1.625	1.640	1.640	.	.
Iran	1.962	1.962	1.963	1.962	.	.
Mexico	3.025	3.175	3.275	3.400	3.485	3.600
Russia	3.958	4.222	4.328	4.680	4.684	4.671
South-Africa	1.497	1.497	1.500	1.335	1.407	1.395
Thailand	2.499	2.692	2.813	2.990	3.170	3.300
USA	17.542	18.208	18.510	18.938	19.361	19.941
<b>World</b>	<b>100.438</b>	<b>103.740</b>	<b>106.639</b>	<b>110.238</b>	<b>114.267</b>	<b>120.000</b>

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

# Broiler

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

	2014	2015	2016	2017	2018	2019
Austria	13,9	14,2	14,6	14,5	14,6	15,0
France	16,9	17,2	18,0	19,0	19,5	20,1
Germany	11,8	12,4	12,9	13,3	15,3	15,6
Italy	11,9	12,5	12,5	.	.	.
Netherlands	20,6	20,3	20,2	20,4	.	.
Portugal	26,0	.	.	.	.	.
United Kingdom	22,5	22,9	23,2	.	.	.
<b>EU</b>	<b>18,0</b>	<b>18,5</b>	<b>19,2</b>	<b>19,2</b>	<b>20,2</b>	<b>20,8</b>

Third Countries						
Argentina	42,6	43,7	44,9	44,7	46,3	.
Brazil	46,0	47,1	46,4	47,0	46,2	46,7
China	9,1	9,4	8,7	7,9	7,9	9,5
India	3,0	3,1	2,6	2,8	3,0	3,2
Japan	19,4	19,6	20,3	21,1	21,7	22,1
Mexico	31,1	32,5	32,9	33,6	34,1	35,1
South Africa	30,9	32,0	32,1	31,4	32,5	31,1
USA	44,8	47,7	48,1	48,7	49,5	50,7

**Note:** Partial provisional or estimated

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

“ The European poultry meat sector is well prepared to meet consumers’ expectations, with production methods that comply with very strict EU rules that are applied throughout the entire production chain – ‘from farm to fork’. ”

# Turkey

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

	2014	2015	2016	2017	2018	2019
Austria	21	20	22	22	25	26
Belgium / Luxembourg	8	8	8	8	7	8
Bulgaria	1	1	0	0	0	0
Croatia	10	13	13	12	14	14
Cyprus	0	0	0	0	0	0
Czech Republic	5	6	9	7	10	10
Denmark	2	1	1	1	1	1
Finland	7	8	8	8	8	9
France	366	355	382	369	338	327
Germany	392	396	407	387	375	378
Greece	3	3	3	3	3	3
Hungary	93	97	101	97	98	102
Ireland	26	26	26	25	27	29
Italy	310	313	331	309	301	298
Malta	0	0	0	0	0	0
Netherlands	28	28	28	28	28	28
Poland	280	312	.	376	384	400
Portugal	37	38	38	40	42	43
Romania	11	12	10	10	14	15
Slovakia	0	0	1	1	1	1
Slovenia	4	5	5	5	5	6
Spain	181	171	187	200	233	236
Sweden	4	4	4	5	5	5
United Kingdom	172	177	164	151	157	158
<b>EU</b>	<b>1.961</b>	<b>1.992</b>	<b>2.096</b>	<b>2.063</b>	<b>2.075</b>	<b>2.094</b>
Brazil	470	480	596	586	576	.
Canada	168	172	183	171	169	.
Mexico	19	19	17	16	17	.
Russia	105	105	110	100	.	.
South Africa	53	.	.	.	.	.
USA	2.611	2.552	2.713	2.713	2.666	2.639
<b>World</b>	<b>5.640</b>	<b>5.656</b>	<b>5.995</b>	<b>5.876</b>	<b>5.901</b>	<b>5.900</b>

**Note:** Partial provisional or estimated.

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

# Turkey

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

	2014	2015	2016	2017	2018	2019
Austria	5,8	5,5	5,5	5,3	5,4	5,4
France	5,1	4,6	4,8	4,7	4,4	4,4
Germany	5,9	5,9	6,0	5,7	5,9	5,8
Italy	4,9	4,9	.	.	.	.
Netherlands	1,1	1,1	.	.	.	.
Portugal	4,9	.	.	.	.	.
United Kingdom	4,1	.	.	.	.	.
<b>EU</b>	<b>3,9</b>	<b>3,9</b>	<b>4,1</b>	<b>4,0</b>	<b>4,0</b>	<b>4,1</b>

Third Countries						
Brazil	1,8	.	.	.	.	.
Canada	4,1	.	.	.	.	.
Mexico	1,4	.	.	.	.	.
Russia	0,8	.	.	.	.	.
USA	7,2	7,3	7,5	7,4	7,3	7,3

**Note:** Partial provisional or estimated.

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

“The EU poultry meat sector sets global standards for sustainability and animal welfare.”

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

	2014	2015	2016	2017	2018	2019
Austria	0,1	0,1	0,1	0,1	0,4	0,5
Belgium / Luxembourg	0,1	0,1	0,1	0,1	0,1	0,1
Bulgaria	22,0	20,3	22,5	19,6	23,2	23,0
Cyprus	0,0	0,0	0,0	0,0	0,0	0,0
Czech Republic	7,3	8,0	9,0	11,1	12,2	11,5
Denmark	3,5	4,0	1,0	1,8	102,0	1,5
Estonia	.	.	.	.	.	.
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	230,1	231,6	206,2	203,6	227,3	221,6
Germany	51,1	50,3	48,5	40,5	41,4	39,1
Greece	0,1	0,1	0,1	0,1	0,1	0,1
Hungary	79,8	84,0	79,5	68,0	122,9	119,0
Ireland	4,5	5,1	5,2	5,8	5,8	5,8
Italy	11,0	9,0	6,9	5,5	6,0	6,0
Latvia	.	.	.	.	.	.
Lithuania	0,1	0,1	0,1	0,1	0,1	0,1
Malta	.	.	.	.	.	.
Netherlands	15,0	16,0	16,0	18,0	19,0	19,0
Poland	41,4	44,6	59,1	47,5	45,0	51,2
Portugal	8,7	9,9	10,0	10,1	10,6	10,4
Romania	.	.	.	.	.	.
Slovakia	0,5	0,4	0,4	0,4	0,4	0,4
Slovenia	.	.	.	.	.	.
Spain	5,0	2,0	4,1	3,7	3,2	4,6
Sweden	0,0	0,0	0,0	0,0	0,0	0,0
United Kingdom	32,1	29,2	30,0	30,6	30,4	29,9
<b>EU</b>	<b>532,0</b>	<b>523,0</b>	<b>510,0</b>	<b>475,0</b>	<b>555,0</b>	<b>550,0</b>
<b>World</b>	<b>4362,5</b>	<b>4297,0</b>	<b>4417,3</b>	<b>4334,5</b>	<b>4464,9</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. Poultry meat market projections for the EU, 2012–2030 ('000 tonnes carcass weight equivalent)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2025	2030
Gross indigenous production	12 716	12 805	13 263	13 788	14 495	14 557	15 252	15 628	15 844	16 170	16 430
Consumption	12 233	12 285	12 719	13 254	13 831	13 814	14 462	14 813	15 052	15 412	15 596
per capita consumption (kg r.w.e.)*	21.3	21.4	22.0	22.9	23.8	23.7	24.8	25.4	25.7	26.3	26.6
Imports (meat)	841	791	821	855	882	789	802	850	858	941	949
Exports (meat)	1 324	1 311	1 365	1 388	1 546	1 532	1 593	1 665	1 650	1 699	1 784
Net trade (meat)	483	520	544	533	664	743	791	814	792	758	835
EU market price in EUR/t	1 955	1 991	1 951	1 914	1 822	1 854	1 909	1 917	1 920	1 929	1 938
World market price in EUR/t	1 503	1 516	1 460	1 480	1 384	1 463	1 314	1 385	1 375	1 501	1 610

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

**Source:** EU Agricultural Outlook, for the agricultural markets and income 2012-2030, The European Commission, DG AGRI, December 2019 ([https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2019-report\\_en.pdf](https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2019-report_en.pdf))

“Consumption of poultry meat in the EU increased by 21% between 2012 and 2020.”

# Projections

## 15. Aggregate meat market projections for the EU, 2012–2030 ('000 tonnes carcass weight equivalent)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2025	2030
Net Production	44 010	43 604	44 403	45 750	47 073	46 958	48 242	48 692	49 157	49 055	48 032
Consumption	41 587	41 168	42 182	43 281	43 848	43 808	44 993	44 821	44 605	44 419	44 998
per capita consumption (kg r.w.e.)*	65.7	64.9	66.3	67.9	68.6	68.4	70.2	69.8	69.7	69.1	68.7
of which beef and veal meat	10.8	10.4	10.5	10.6	10.8	10.8	11.0	10.9	10.8	10.3	10.0
of which sheep and goat meat	1.8	1.8	1.8	1.8	1.8	1.7	1.8	1.7	1.8	1.8	1.8
of which pig meat	31.8	31.3	31.9	32.5	32.2	32.2	32.6	31.8	31.5	30.7	30.2
of which poultry meat	21.3	21.4	22.0	22.9	23.8	23.7	24.8	25.4	25.7	26.3	26.6
Imports (meat)	1 326	1 311	1 332	1 368	1 402	1 261	1 303	1 315	1 329	1 483	1 522
Exports (meat)	3 749	3 747	3 553	3 837	4 627	4 410	4 551	5 186	5 683	6 119	5 556
Net trade (meat)	2 423	2 435	2 221	2 469	3 225	3 150	3 248	3 871	4 355	4 636	4 034

\*retail weight equivalent; Coefficients to transform carcass weight into retail weight are 0.7 for beef and veal, 0.78 for pig meat and 0.88 for both poultry meat and sheep and goat meat.

**Source:** EU Agricultural Outlook, for the agricultural markets and income 2012-2030, The European Commission, DG AGRI, December 2019 ([https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2019-report\\_en.pdf](https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/agricultural-outlook-2019-report_en.pdf))

# EU28 poultry meat import trade, main tariff lines, 2010, 2015, 2018, 2019

## IMPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2018	2019	2018	2019
<b>0207 (poultry)</b>	<b>MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN</b>	1774509	1545115	2333134	2153878	219,97	196,43
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens'	114.059	101.425	160.057	108.187	126,87	126,81
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus domesticus	4.181	84.397	111.844	124.254	251,96	211,80
02071370	Fresh or chilled cuts of fowls of the species Gallus domesticus, with bone in (excl. Halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof)	80	0	555.642	702.251	164,40	133,47
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.018.233	960.827	1.258.201	974.632	252,95	238,37
02071460	Frozen legs and cuts thereof of fowls of the species Gallus domesticus, with bone in	120.717	56.336	35.269	25.532	106,44	125,83
02071470	Frozen cuts of fowls of the species Gallus domesticus, with bone in (excl. Halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof)	30.487	13.476	2.807	2.286	135,23	97,77
02072710	Frozen boneless cuts of turkeys of the species domesticus	144.332	103.235	137.991	119.188	326,94	386,92
<b>02109939</b>	<b>MEAT, SALTED, IN BRINE, DRIED OR SMOKED</b>	1.956.433	2.654.064	1.757.486	2.035.688	269,00	221,89
<b>1602 (poultry)</b>	<b>PREPARED/PRESERVED MEAT</b>	4.287.212	3.866.031	3.381.790	3.381.272	322,01	344,91
160231	<b>TURKEYS</b>	844.277	490.302	133.521	29.487	325,36	427,70
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	796.706	471.960	123.748	21.006	296,99	307,97
160232	<b>GALLUS DOMESTICUS</b>						
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	119.050	143.244	33.434	30.988	249,38	278,90
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	2.329.172	2.416.897	2.746.517	2.920.095	326,20	342,09
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.)	804.552	638.260	284.712	206.466	237,24	304,47
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.)	52.690	18.455	21.284	21.340	321,55	331,39
160239	<b>OTHER</b>	137.470	158.872	162.323	172.896	411,93	440,19
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	132.065	155.799	159.149	168.060	412,37	440,47

Source: Extraction Eurostat, July 2020

# EU28 poultry meat export trade, main tariff lines, 2010, 2015, 2018, 2019

## EXPORTS

CN CODE	Product definition	QUANTITY 100 KG				VALUE €/100kg	
		2010	2015	2018	2019	2018	2019
<b>0207 (poultry)</b>	<b>MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN</b>	11.243.986	13.244.390	15.490.321	16.615.792	90,56	94,38
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	236.445	164.133	145.840	119.624	95,16	100,54
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens',	2.787.185	2.752.743	2.164.184	2.069.073	119,20	121,58
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	1.872.421	2.085.660	3.210.141	3.732.732	46,83	50,96
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	1.077.780	1.587.412	1.779.657	2.047.830	89,70	98,09
02071430	Frozen whole wings, with or without tips of Gallus domesticus	946.828	1.636.215	1.968.165	2.237.338	109,04	117,44
02071460	Frozen legs and cuts thereof of fowls of the species gallus	489.997	989.773	1.331.052	1.438.989	88,13	92,88
02071470	Frozen cuts of Gallus domesticus with bone in (excl. halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof	607.181	773.755	665.657	783.837	92,55	101,43
02072710	Frozen boneless cuts of turkeys of the species domesticus	306.905	229.196	216.872	202.843	102,17	117,73
02072730	Frozen whole wings, with or without tips, of turkeys	217.389	358.435	335.052	293.078	109,51	128,94
0207 other		2.701.855	2.667.068	3.673.701	3.690.448	100,34	101,85
<b>1602 (poultry)</b>	<b>PREPARED/PRESERVED MEAT</b>	451.728	379.993	437.746	541.743	369,66	360,34
16023119	Meat or offal of turkeys "poultry", prepared or preserved, containing- >= 57% by weight of meat or offal of poultry	19.937	40.314	51.816	54.997	401,59	393,12
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	179.980	171.993	215.194	240.942	354,73	357,83
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.)	103.439	60.222	67.516	118.246	356,86	349,10
1602 other		148.372	107.464	103.220	127.558	393,11	361,37

Source: Extraction Eurostat, July 2020

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